

**SARASOTA MILITARY ACADEMY  
BOARD OF DIRECTORS  
Annual Meeting  
Tuesday August 29, 2023**

- Call to Order
- Pledge of Allegiance
- Approval of the Minutes -Tab 1
  - June 20, 2023
- Introduction of Guests
  - Prospective Board Members
  - Regimental Commander
- Superintendent Report –Tab 2
- Provost Report - Tab 3
  - HR Update
  - Teacher Utilization
- Head of School Report – SMA Prep Tab 4
  - Athletic Director Report
  - Faculty Representative
- Head of School Report – SMA High Tab 5
  - Athletic Director Report
  - Faculty Representative
- SAI Report - Tab 6
- Treasurer’s Report - Tab 7
  - Monthly Financial Report
  - Proposed Budget for SY 2023-2024
- SMA Foundation, Inc. Report Tab 8
- Committee Report
  - Board Member Selection Committee
  - PTCC
- Chairperson’s Report
- Old Business
  - Superintendent Search
  - What kind of school do we want to be?

- New Business
- Public Comment
- Meeting Adjournment

# **Sarasota Military Academy**

## **BOARD OF DIRECTORS**

### **ANNUAL MEETING MINUTES**

**20 JUNE 2023**

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#### **Board of Director Members' Attendance**

##### **Present:**

Thomas J. McElheny, EdD, Capt, USMC (Former Marine), Chair  
Scott Lempe, Lt Col, USAF (Ret), Vice Chair/Treasurer  
Ben Knisely, COL, USA (Ret), Secretary  
Erica Gregory, Lt Col, USAF (Ret)  
Linda Long  
Pete Skokos  
Richard Swoope, COL, USA (Ret) (virtual)

Herb Jones, Chair, SMA Foundation (virtual)  
J. Allison Archbold, Trustee, SMA Foundation Inc. (virtual)

**Absent:** Heather Koester; Brian Crupi, LTC, USAR; Cynthia West, RN Lt, USA (Ret); Jim Tollerton; SMA-LTC Abby Williams, Assistant Head of High School

##### **SMA Administrative Staff in Attendance:**

SMA-COL Christina Bowman, Chief Executive Officer/Head of High School  
SMA-LTC Caitlin West, Assistant Head of High School (virtual)  
SMA-LTC Steve Kok, Director of Finance  
SMA-MAJ Charlie Carver, Athletic Director (virtual)  
SMA-COL Tom Vara, Head of Middle School  
SMA-LTC Cheryl Korwin, Assistant Head of Middle School

**Guests in Attendance:** Dr. David Thompson; Ms. Brenda Canales, PTCC President; SMA-MAJ Ashley Wyka, HS Math Department Chair; SMA-MAJ Michael Finley, Performing Arts Department Chair; Ms. Dottie O'Neill

Location: SMA High School

The chair called the meeting to order at 10:04 am.

Chair Thomas McElheny started the Pledge of Allegiance.

##### **Motion to Approve the 09 May 2023 Minutes:**

Ms. Linda Long moved to approve the 09 May 2023 minutes; COL Ben Knisely seconded the motion and the board unanimously approved.

Chair McElheny stated the resignations of the following board members as Dr. Brian Crupi, Ms. Cynthia West and Mr. Jim Tollerton. He mentioned Vice Chair and Treasurer Scott Lempe would be resigning to be part of staff.

Vice Chair Lempe exited the conference room. Chair McElheny discussed the reorganizational chart to include the roles and responsibilities of the interim superintendent and academy provost. SMA-COL Christina Bowman stated the process of the superintendent search still needs to be defined.

Chair McElheny stated the search committee recommends Vice Chair Lempe as interim part-time superintendent.

**Ms. Erica Gregory moved to approve Vice Chair Scott Lempe as interim, part-time superintendent; Mr. Pete Skokos seconded the motion and the board unanimously approved.**

Chair McElheny stated Mr. Skokos and Ms. Gregory will be part of the superintendent search committee. He welcomed Vice Chair Lempe back into the room to congratulate him with the board. Vice Chair Lempe delivered his resignation from the board.

**CEO/Head of High School Report:** SMA-COL Christina Bowman provided a read-ahead report. She discussed the successful hiring of great staff on both campuses with only a few positions still open. SMA-BG Lempe inquired as to the plans for campus facilities over the summer. SMA-LTC Steve Kok replied the middle school's gym was refinished and deep cleaning is underway along with forty-five interactive televisions installed at the high school as well as deep cleaning, chrome book carts updated, and walkway roofs waiting for millage funds to restore. COL Knisely inquired as to the condition of our busses in which SMA-LTC Kok replied that the motor was built for one bus and need to rebuild another. SMA-COL Bowman stated a meeting with SSAS on the possibility of assisting each other with joint bus drivers. She mentioned the annual conflict of interest form need to be filled out by each board member.

**Ms. Long moved to approve the board-meeting schedule for 2023-24; Ms. Gregory seconded the motion and the board unanimously approved.**

**Head of Middle School Report:** SMA-COL Tom Vara provided a read-ahead report. He discussed the preparation of the middle school facilities and reviewing testing data from previous year.

**SAI Report:** Chair McElheny stated a new SAI to start would be responsible in driving character and leadership development.

**Academy Athletics Report:** N/A

**Treasurer's Report:** SMA-LTC Steve Kok provided a read-ahead report. He discussed the year-to-date profit and loss per campus. SMA-LTC Kok discussed increases in FRS, health insurance and property and casualty insurance along with increase to bus driver pay and increase to fuel. He stated the need for board approval of the tentative budget due to the district by end of month with the actual budget due by end of September.

**COL Knisely moved to approve the 2023-24 tentative budget; Ms. Long seconded the motion and the board unanimously approved.**

SMA-LTC Kok recommended a 2% raise to faculty and staff.

**COL Knisely moved to approve the 2% salary raise for 2023-24; Ms. Gregory seconded the motion and the board unanimously approved.**

**Staff Representatives:** N/A

**PTCC Report:** N/A

**Chair Report:** Chair McElheny thanked the board for their efforts this year and proceeded with the board nominations.

**COL Knisely moved to approve the nomination of Ms. Linda Long as the Assistant Secretary; Chair McElheny seconded the motion and the board unanimously approved.**

**Ms. Long moved to approve the nomination of COL Ben Knisely as the Secretary; Mr. Skokos seconded the motion and the board unanimously approved.**

**Chair McElheny moved to approve the nomination of Ms. Erica Gregory as the Vice Chair; COL Knisely seconded the motion and the board unanimously approved.**

**COL Knisely moved to approve the nomination of Dr. Thomas McElheny as the Chair; Ms. Gregory seconded the motion and the board unanimously approved.**

**Chair McElheny moved to approve the nomination of Mr. Peter Skokos as the Treasurer; Ms. Long seconded the motion and the board unanimously approved.**

Chair McElheny stated for board members who may need to renew the course for Sunshine Laws to comply. He mentioned the need to identify priorities in creating goals for the future of the academy. Chair McElheny encouraged the board to attend with him and his table to the Operation Patriot Support's event, *Evening with Heroes*, on 7 September at The Grove in Lakewood Ranch to support fellow board member's Mr. Skokos' cause.

**CEO/Head of High School Evaluation:** Chair McElheny discussed the process of the chair to evaluate the CEO and Head of High School position. He stated that both evaluations would be shared at the next board meeting and welcomes feedback for full transparency.

**Old Business:** N/A

**New Business:** N/A

**Public Comments:** N/A

The next board meeting will be on 29 August 2023 at 2:30 pm at the High School campus.

The chair adjourned the meeting at 11:26 am.

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Dr. Thomas McElheny, Chair

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Date

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COL Ben Knisely, Secretary

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Date



From: Superintendent

To: Chair, SMA Board of Directors

Subject: Superintendent's Report

Date: August 24, 2023

Opening of school this year was one of the smoothest I've ever seen. Some highlights of our preparation follow:

**Enrollment:** Enrollment is down. As of the 5-day count total academy enrollment was 1103 (491 at Prep and 612 at HS). 2022/2023 school year 5-day count was 1233 (576 at Prep and 657 at HS). We built our 2023/2024 budget on an enrollment of 1192. The Board will see the impacts of these numbers in their budget.

**Staffing:** High school opened fully staffed. Prep has vacancies in Computer Science and Science.

**Teacher Staff Development:** Professional development focused on the use of Thinking Maps and, at Prep, Classroom Discipline. Teachers also received training on the use of their new Interactive TVs. Administrators and staff attended a presentation by law enforcement from Nashville, TN where they shared lessons from the Covenant School mass shooting.

**Transportation:** We are fully staffed in drivers with 5 full time drivers. We also have two subs plus Director of Transportation. There are six buses in fleet leaving 1 for emergencies and odd time field trips. The District is also fully staffed so for us that means buses are back on time and all routes are being covered.

**Food Service:** There was a change in the delivery model. A retirement of an SMA staff member meant either hiring another staff member or including serving lunch in our contract with the District. They now provide a server as well as POS staff. We're currently waiting for a report on our Free or Reduced Lunch numbers.

**Technology:** Thirty nine interactive TVs were hung and programmed by ITS. Teachers had several trainings on the use of them and have committed to learning how to use them. Seventy five Chromebooks and 3 carts were purchased and programmed for use at the prep.

**Facilities:** Rooms needing repairs or paint were completed. Projectors and whiteboards were removed and dismantled and given to other charter schools. Thirty nine of 42 interactive TVs were hung and put on our network. The large stump at Prep blown over by Ian was removed and an oak tree replanted. All classrooms and learning spaces were deep cleaned before students returned.

**Safety:** A new security system was installed at the high school replacing an antiquated system. This dovetails with the system at the prep, so a teacher going to both campuses will have access to both campuses with the same card/fob. We are continuing to make upgrades to

the new system. As of today Steve Kok has access to control the 2 driving gates and the breezeway walk through gate from his PC. Eventually all security and admin personnel will have the program on their phones to control the access gates. This will allow anyone to open the gate by the touch of their phone and lock them open in the event of an emergency

Head of School Report  
For August, 2023

**Enrollment**

Grade 6: 157  
Grade 7: 176  
Grade 8: 161  
Total: 494

**Campus Life/Events**

- 8/3-Teacher training week
- 8/8-New Family Orientation @ 5pm
- 8/9-Basic Training: New Cadet Orientation
- 8/10-First day of classes
- 8/10-Formation was conducted on day one
- 8/11-Grade level meeting to discuss expectations
- 8/18-Full campus lockdown drill
- 8/21-Girls volleyball try-outs
- 8/22-Golf try-outs
- 8/22-FAST testing
- 8/25-Fire Drill
- 8/29-Board of Directors meeting 2:30 @ HS

**Cadet Highlights**

- Cadets of the Month: Program starts in September

**Parent and Community Highlights:**

- Orientation for 6<sup>th</sup>-grade and new parents
- We called several parents to assist their cadets with registration and signing into our school email
- Email and text messages were sent to parents alerting them of important dates, important information, and directing them to our website

**Team Meetings**

- 8/8-Department Chair
- 8/9-New Teacher
- 8/18-Prep Administration
- 8/21-School Improvement Plan + Goals
- 8/30-Threat Assessment + Safety team



**Security:**

- Threat assessment team to meet on August 30th
- Safety team reviewed meeting dates for 23-24
- Review of all state mandates that has occurred throughout the summer
- Two security drills conducted with our staff during training week  
August 4 + August 7

**Attention Items:**

- 6 new staff members hired to the Prep
- Daily safety procedures were established and reviewed with our staff
- Prep is establishing Academy and school based goals to address student achievement and enrollment.

**SMA Prep PTCC**

- The SMA Prep PTCC is currently working with administration for the 2023-2024 calendar and events. We are currently planning several activities for the beginning of the school year.

SMA Prep Faculty Representative: SMA-CPT Leslie Smith

High School Head of School Report  
August 29, 2023

**Mission:**

Within a culture where every cadet is valued, Sarasota Military Academy is committed to: Preparing students for College, Careers, & Citizenship; Developing tomorrow's Leaders; and Cultivating Character based on the steadfast values of Honor, Integrity, and Respect.

**Strategic Plan Goals:**

- **Resources:**
  - Increase retention of rising 9<sup>th</sup> Graders by 5% each year for the next five years.
  - Goal: 61% Actual: 53%
  - Increase High School enrollment by 25 FTEs for SY 2023-2024
  - Goal: 655 Actual: 619
  - Met with PTCC Vice President to reflect on SY and begin planning for SY 2023-2024
    - Increase parent, cadet and staff participation by 10%
- **College, Careers, and Citizenship**
  - Acquire and retain quality staff.
    - Superintendent
    - HS: 2 AI, 1 SAI; Instructors: 5; Support Staff: 3
    - MS: Assistant Head of School: 2; Instructors: 6
    - Shared: 1 (Band)
  - Support Professional Development
    - HS: Thinking Maps; 7 Instructors attended 18 hour training and then trained staff. Already observing use of Thinking Maps in lessons. Will train and implement on Middle School Campus for SY 2024-2025.
    - MS: Classroom Management; 6 Hours
    - Youth Mental Health Assistance Training: ALL employees must complete every 3 years. Majority of the staff must complete this year.

- **Character and Leadership Development**

- Create programming, staff training, climate and culture that integrates the Seven Core Values of the United States Army and Leadership Development consistently from grades 6-12.
  - Implement with fidelity and consistency for SY 2023-2024
  - Reviewed expectations with faculty and staff
  - Reviewed expectations with cadets
  - Completed walkthroughs in every three days in a row
    - Makeup work and late work policy
    - Cell phone policy
    - Uniform
    - Summer assignments
      - 80% submitted on time
      - Saturday School for those that did not submit

**Communication/Community Outreach:**

- Tiger Bay
  - 7 September 12:00 pm-1:30 pm
  - 2 Adults, 6 Cadets
- Operation Patriot Support Evening with Heroes
  - 7 September 6:00 pm-9:00 pm
- The Grove
- Congressman Steube's Service Academy Fair
  - 9 September 10:00 am-12:00 pm
  - HS Gymnasium
- Spin Night
  - 13 September 5:30 pm -7:30 pm
- Next Meeting: September 26, 2023 4:30 pm Prep

**SARASOTA COUNTY**SARASOTA MILITARY ACADEMY - 007  
2024 - 1

SIS Live.

SIS &gt; Enrollment &gt; View

[Options](#) | [H](#)

## Enrollment by Race

## Majority/Minority Section

Grade Level	Majority		Minority		Total
	MALE	FEMALE	MALE	FEMALE	
06	42	22	57	37	158
07	53	22	67	34	176
08	42	37	42	40	161
09	45	28	60	35	168
10	52	28	47	45	172
11	58	18	45	28	149
12	39	14	33	36	122
TOTAL	331	169	351	255	1106

A - ASIAN(OLD PACIFIC ISLANDER), Minority

B - BLACK/AFRICAN-AMERICAN, Minority

I - AMERICAN INDIAN/ALASKA NATIVE, Minority

P - NATIVE HAWAIIAN / PACIFIC ISLANDER, Minority

W - WHITE, Majority

## Primary Race Section

Grade Level	MALE						FEMALE						Total
	I	A	B	H	M	W	I	A	B	H	M	W	
06		6	1	44	6	42		3	6	24	4	22	158
07		3	4	55	5	53		1	5	25	3	22	176
08		1	3	29	9	42	1		1	33	5	37	161
09	1	3	4	49	3	45		1	7	25	2	28	168
10		2	5	30	10	52			10	34	1	28	172
11		2	6	36	1	58		1	2	23	2	18	149
12			5	25	3	39			3	29	4	14	122
TOTAL	1	17	28	268	37	331	1	6	34	193	21	169	1106

[illegible]

Grade	504	ELL (LY, LF)	ESE	Gifted	Totals	Students	Percent	Prep
6	18	34	16	3	71	124	57%	
7	23	30	36	4	93	176	53%	
8	27	19	11	3	60	161	37%	
	68	83	63	10	224	461		
	14.75%	13.67%	13.67%	2.17%	48.59%			
ELL								
Arabic	2							
Tagalog	2							
Portuguese	17							
Vietnamese	5							
Spanish	57							
other	2							
Small Group	142	30.80%						
Oral Presentation	66	14.32%						
These are from testing documents numbers and can be off a bit. I will double check after testing is over and enrollment is more solidified								





The School Board of Sarasota County, Florida  
**Parental Authorization for Deviation from Student's Legal Name -  
2023-2024**

Student ID#	Student First Name	MI	Last Name	Birth Date	School
Parent/Guardian First Name		Last Name		Phone Number	Relationship to Student

**Florida Administrative Code 6A-1.0955: Education Records**, requires school districts to develop a form to obtain parental consent whereby parents may specify the use of any deviation from their child's legal name in school. Without this consent, school personnel are obligated to use your student's legal name as it appears on their birth certificate.

***This consent authorizes school personnel to use the parent/guardian approved name/nickname, as indicated below, for my student. I understand that this name/nickname will be entered into the Student Information System***

***I, \_\_\_\_\_ authorize my student, \_\_\_\_\_ to be referred to by the following approved name/nickname.***

\_\_\_\_\_

Parent Signature: \_\_\_\_\_

Date: \_\_\_\_\_



# OPERATION PATRIOT SUPPORT (OPS)

PRESENTS AN

## EVENING WITH HEROES

WITH FEATURED SPEAKER

TUSKEGEE AIRMAN AND THREE WAR COMBAT VETERAN

### LT. COL. (RET.) GEORGE HARDY



## September 7th, 2023 6:00–9:00 PM

**at The Grove** 10670 Boardwalk Loop, Lakewood Ranch, FL 34202

Dinner, cocktails, raffles, great prizes See reverse side or visit [www.operationpatriotssupport.org](http://www.operationpatriotssupport.org)



George entered active-duty military service in July 1943, entered Aviation Cadet Training, at Tuskegee Army Airfield, in December 1943, and graduated as a pilot in September 1944. George was assigned to the 99th Fighter Squadron, 332nd Fighter Group in Italy and flew 21 combat missions over Germany prior to his discharge in 1946.

George was recalled to active duty 1948, assigned to the 301st Fighter Squadron, 332nd Fighter Group. Following Airborne Electronics Officers School George was transferred to the 28th Bomb Squadron, 19th Bomb Group (B-29s). In 1950, he flew 45 combat missions over Korea in B-29 aircraft. From 1951 – 1962 George served in Squadrons in the Strategic Air Command as Maintenance Officer and Squadron Commander and received his Command Pilot Rating in 1959.

In 1964, George received his graduate engineering degree and in 1966 he was assigned as Chief of Engineering/Program Manager for high level Comms Systems. In 1970, George transferred to the 18th Special Operations Squadron (Vietnam) as pilot in AC-119K Gunship and served as Operating Location Commander at Udorn Air Base, and at Da Nang Air Base. George flew 70 combat missions and returned from Vietnam in April 1971 and retired from the USAF in November 1971.

Decorations include: Distinguished Flying Cross, Air Medal w/11 Oak Leaf Clusters, and Commendation Medal w/1 Oak Leaf Cluster.





**SARASOTA MILITARY ACADEMY**

Senior Army Instructor  
801 North Orange Avenue  
Sarasota, Florida 34236

24 August 23

MEMORANDUM FOR GOVERNING BOARD, SARASOTA MILITARY ACADEMY  
THROUGH Superintendent Sarasota Military Academy

SUBJECT: Significant Activities Report

Significant activities this past summer:

- Rifle team finished 1<sup>st</sup> in the Junior Nationals Scholastic Division
- Leadership camp 2023 sets tone for the upcoming school year (33 cadets tested on the Cadet Challenge)
- Military Ball date locked in for 14 Dec 2023 1830 to 2200

Significant activities next thirty days:

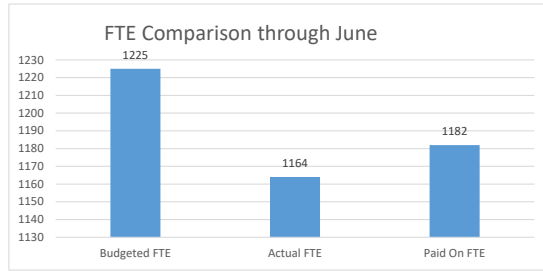
- Bridge building with the Prep
  - ~ My initial trip to the prep happened on the 18<sup>th</sup> of this month
  - ~ Developing plan to go down there possibly two times a week which supports their A and B schedule in order to get to meet all of the cadets
  - ~ Regimental staff working on a Service Learning project that will be centered around the United States Flag history and retirement. This will be done primarily with the rising 7<sup>th</sup> and graders.
- Color Guard performances
  - ~ 7 Sep, Operation Patriot Support to be held at 10670 Boardwalk Loop
  - ~ 9 Sep, Service Academy Fair to be held at SMA
  - ~ 11 Sep, Shrine Temple, to be held at the Shrine Temple
  - ~ 13 Sep, COL Mark Tillman Event, to be held at the Van Wezel Performing Arts Hall
  - ~ 14 Sep, Sarasota Ducks Unlimited Dinner, to be held at Gold Coast Eagle Distributing

Respectfully,

JN

JAMES A. NELSON  
LTC (Retired), U.S. Army  
JROTC, Senior Army Instructor

# Profit and Loss Pie Charts through June 2023



Income		
3100 Federal Direct	\$	232,655
3200 Federal through State & Local	\$	76,219
3300 Revenue from State Sources	\$	9,325,526
3400 Revenue from Local Sources	\$	4,688,904
3741 Insurance Loss Recovery	\$	7,993

**Total Revenue \$14,331,297**

3430 Change in Value of Interest Rate Swap **\$172,938**

**Total Revenue without SWAP \$14,158,359**

Expenses	
4100 Salaries	\$7,419,828
4200 Employee Benefits	\$2,302,417
4300 Purchased Services	\$1,714,547
4400 Energy Services	\$283,737
4500 Materials & Supplies	\$381,405
4600 Capital Outlay	\$240,993
4700 Other Expenses (less depreciation)	\$753,221

**Total Operating Expenses \$13,096,148**

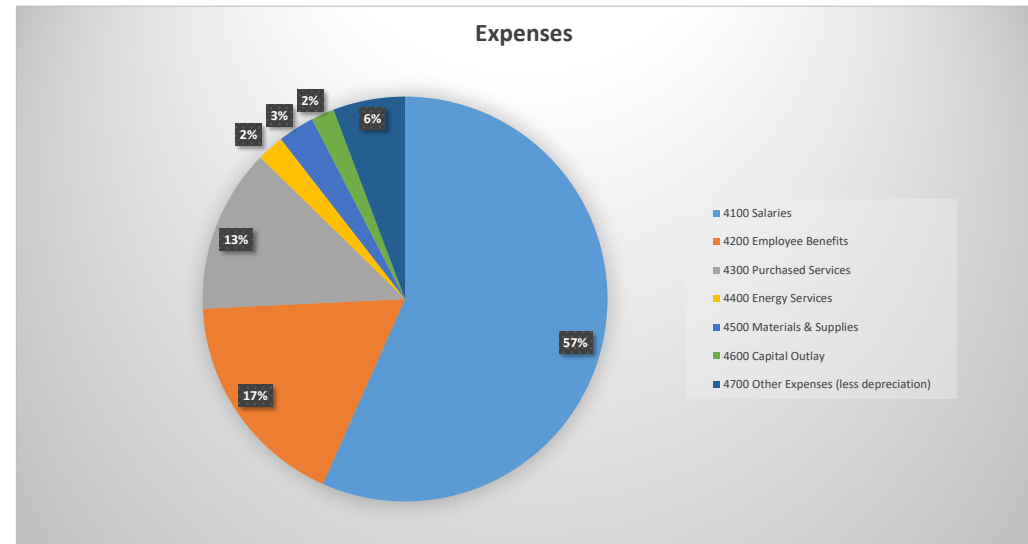
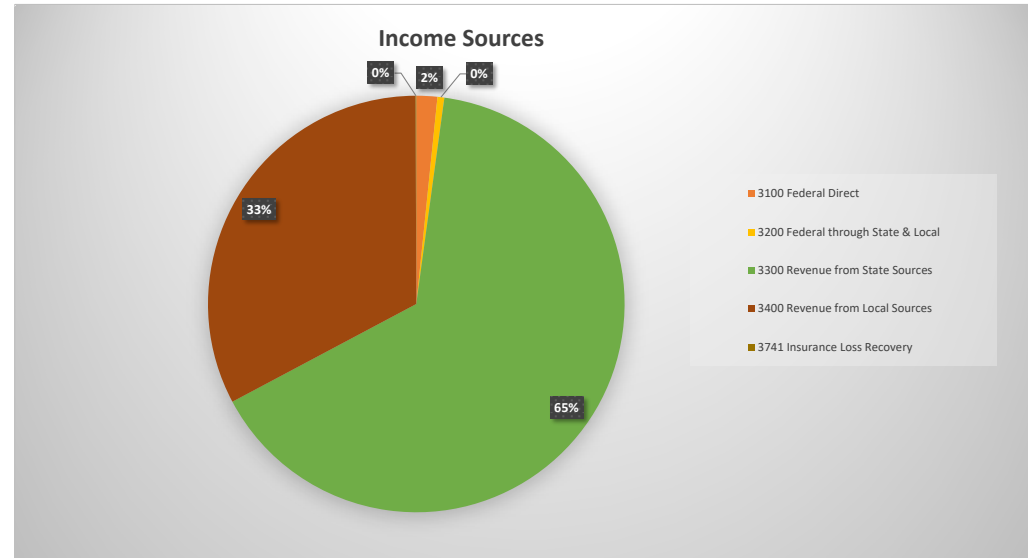
**Net Operating Income \$1,235,149**

**Depreciation Expense \$670,389**

**Net Income \$564,760**

**Net Income without SWAP \$391,822**

**Salaries & Benefits Equal 74 % of Operating Budget**



**Sarasota Military Academy  
Balance Sheet- By Campus  
As of June 30, 2023**

	<u>Total</u>
<b>ASSETS</b>	
<b>Current Assets</b>	
<b>Bank Accounts</b>	
1110 Cash and cash equivalents	1,531,380
8-1111 Sport Team Bank Accounts	57,596
<b>Total Bank Accounts</b>	<b>\$ 1,588,976</b>
<b>Other Current Assets</b>	
1220 Due from Other Governments	320,631
1230 Prepaids	6,353
<b>Total Other Current Assets</b>	<b>\$ 326,984</b>
<b>Total Current Assets</b>	<b>\$ 1,915,960</b>
<b>Total Fixed Assets</b>	<b>\$ 18,853,351</b>
<b>TOTAL ASSETS</b>	<b>\$ 20,769,311</b>
<b>LIABILITIES AND EQUITY</b>	
<b>Liabilities</b>	
<b>Current Liabilities</b>	
Total Accounts Payable	<b>\$ 47,109</b>
Total Credit Cards	<b>\$ 61,333</b>
Total Other Current Liabilities	<b>\$ 1,097,720</b>
<b>Total Current Liabilities</b>	<b>\$ 1,206,162</b>
<b>Total Long-Term Liabilities</b>	<b>\$ 9,377,762</b>
<b>Total Liabilities</b>	<b>\$ 10,583,924</b>
<b>Equity</b>	
3010 Invested In Capital Assets, Net	8,901,910
3020 Temporarily Restricted Net Asse	28,337
3030 Unrestricted Net Assets	690,380
Net Income	564,760
<b>Total Equity</b>	<b>\$ 10,185,387</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$ 20,769,311</b>

Friday, Aug 18, 2023 11:29:10 AM GMT-7 - Accrual Basis

$\$1,915,960 - \$1,206,162 = \$709,798$  Working Capital; Up \$84,812 from April- \$624,986

Ratio of Assets to Liabilities =  $\$1,915,960 / \$1,206,162 = 1.59$ ; Up 0.08 from April- 1.51





# Sarasota Military Academy

## Profit and Loss - YTD - By Campus

July 2022 - June 2023

	HS	PREP	TOTAL
Income			
3100 Federal Direct	232,655		\$232,655
3200 Federal Through State & Local	59,314	16,905	\$76,219
3300 Revenue from State Sources	5,104,028	4,221,498	\$9,325,526
3400 Revenue from Local Sources	2,794,812	1,894,092	\$4,688,904
3741 Insurance Loss Recovery		7,993	\$7,993
<b>Total Income</b>	<b>\$8,190,808</b>	<b>\$6,140,488</b>	<b>\$14,331,296</b>
GROSS PROFIT	<b>\$8,190,808</b>	<b>\$6,140,488</b>	<b>\$14,331,296</b>
Expenses			
4100 Salaries	4,076,632	3,343,197	\$7,419,828
4200 Employee Benefits	1,233,262	1,069,155	\$2,302,417
4300 Purchased Services	973,094	741,453	\$1,714,547
4400 Energy Services	112,020	171,717	\$283,737
4500 Materials & Supplies	222,792	158,613	\$381,405
4600 Capital Outlay	134,210	106,783	\$240,993
4700 Other Expenses	958,569	465,041	\$1,423,610
<b>Total Expenses</b>	<b>\$7,710,579</b>	<b>\$6,055,958</b>	<b>\$13,766,537</b>
NET OPERATING INCOME	<b>\$480,229</b>	<b>\$84,530</b>	<b>\$564,760</b>
NET INCOME	<b>\$480,229</b>	<b>\$84,530</b>	<b>\$564,760</b>

# CARLOS J. MOREIRA

(347) 489-8399

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[www.linkedin.com/in/carlosjmoreira](http://www.linkedin.com/in/carlosjmoreira)

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## PROFESSIONAL SUMMARY

*An effective leader, well versed in planning, management, budgeting, and fund-raising. I am very familiar with the community and have developed extensive relationships in the academic, veteran, local government, and industrial communities.*

## CORE COMPETENCIES

- Bilingual fluent, English & Spanish
- Cost & Data Analysis
- Risk Analysis
- Attention to Detail
- Logistics & Operations
- Communication Skills
- Strategic Thinking
- Training and Development
- Organizational Leadership
- Lean & Six Sigma
- Contract Management

## EDUCATION, TRAINING, & CERTIFICATIONS

### University of South Florida (AACSB Accredited)

- |  |               |
|--|---------------|
| • Master's in Business Administration (MBA), GPA 3.80                    | Sarasota, FL  |
| • Bachelor of Science: Risk Management & Insurance, (Cum Laude) GPA 3.61 | December 2019 |
| • Bachelor of Science: Finance, (Cum Laude) GPA 3.59                     | May 2018      |
|  | December 2017 |

### National Defense University, Joint Forces Staff College

- |   |             |
|---|-------------|
| • Senior Enlisted Joint Professional Military Education | Norfolk, VA |
|   | April 2011  |

### Training / Qualifications

- |  |               |
|--|---------------|
| • Critical and Creative Design Thinking Certification (Sarasota, FL)   | November 2021 |
| • Diversity, Equity and Inclusion in the Workplace Certificate (Sarasota, FL)  | May 2021      |
| • Safe Zone Ally (LGBTQIA) Training (Sarasota, FL)   | July 2020     |
| • Title IX Responsible Employee Training (Sarasota, FL)  | April 2019    |
| • Prevent Sexual Harassment Training (Sarasota, FL)  | October 2018  |
| • Communication and Consultative Selling Skills (T1) (San Diego, CA)   | August 2016   |
| • Effective Communication Skills (ECS) (San Diego, CA)   | August 2016   |
| • Legal & Installation Command Support Seminar (Camp Pendleton, CA)  | April 2013    |
| • Family Advocacy Command Representative Orientation & Incident Determination Committee (IDC) Training with Counseling Services (Camp Pendleton, CA) | March 2013    |
| • Operational Stress Control and Readiness (OSCAR) Team Member (Beaufort, SC)  | December 2011 |

### United States Marine Corps, Service Schools and Certifications

- |   |               |
|---|---------------|
| • Staff Non-Commissioned Officer's Advanced Leadership Academy (Quantico, VA) | July 2019     |
| • Career Planner (Human Resources) Course (San Diego, CA)                     | August 2016   |
| • Command Financial Specialist (CFS) Course (Camp Pendleton, CA)              | June 2015     |
| • Continuous Process Improvement, Lean & Six Sigma (Camp Pendleton, CA)       | January 2015  |
| • Common Logistics Command & Control System (CLC2S) (Camp Pendleton, CA)      | December 2012 |
| • Career Leadership & Management Academy (Camp Lejeune, NC)                   | June 2012     |
| • Certified, Equal Employment Opportunity                                     | October 2010  |
| • Subsistence Supply & Financial Analyst Course (Fort Lee, VA)                | July 2000     |

## WORK EXPERIENCE

### **Program Director, Office of Regional Chancellor** **University of South Florida Sarasota-Manatee**

**Jul 2018 • Present**  
**Sarasota, FL**

- As Director of Campus Engagement, directly in charge of the Office of Veteran Success and Alumni Affairs. Additionally, work with the Office of Innovation and Business Development on program and certification initiatives and work on Diversity, Inclusion and Equal Opportunity (DIEO) initiatives
- Raised \$95,000+ for programs and scholarships assistance through events, grants, and fundraising
- Office of Veteran Success:
  - Chief connector with state and national government officials, county commissioners, city officials, and the Florida Department of Veterans Affairs on all issues pertaining to veterans
  - Serve as the chair for SALUTE Veterans National Honor Society for all three campuses
  - Oversee the scholarship process and awards for student veterans
  - Provide oversight for the Office of Veterans Success programs and services related to the academic and career success of the Veteran student population at the University of South Florida Sarasota-Manatee campus, including current, prospective, and alumni in the Veteran community
  - Plan, coordinate, and supervise the logistical and administrative requirements for all programs and events conducted by the Office of Veteran Success
- Alumni Affairs: Serve as the USF Alumni Engagement Officer
  - Develop engagement strategies for the Sarasota-Manatee Alumni Association
  - Connect with recent USF graduates (5-10 years out of college) to assess their interest in engaging with the campus
  - Build affinity groups and programming (past SGA leaders, retired faculty/staff, council leaders, etc.) to cultivate a base of support for the campus
  - Solicit entry-level gifts (\$1,000-\$50,000); oversee stewardship efforts for the entry-level gifts
  - Plan and facilitate Alumni events to serve the Alumni needs, USF branding, and connections
- Innovations & Business Development:
  - Work with the Assistant Vice President for Innovation and Business Development to connect with community groups, other business leaders, organizations, and students to engage with the Critical Thinking Program and Student Consulting Course
  - Help recruit companies and students to design opportunities for students to connect with corporate leadership to help solve particular problems or develop a vision for a new activity within the organization
  - Design and launch innovative programs that provide new opportunities for expanding the relationships between USF's internal and external stakeholders
- Advisor to the Regional Chancellor on DIEO in relations to veterans and the Latin community
  - Work with the Interim Vice President for Institutional Equity and Senior Advisor to the President and Provost for Diversity and Inclusion on USF programs and initiatives
  - Connect with community organizations representing Sarasota and Manatee counties to promote USF activities
  - Connect with internal USF Latin organizations (LASA, Sol, Alianza Latina, ISLAC)
  - Represent the Sarasota Manatee campus as the USF presidential advisory committee member for faculty, staff, and the community and in the Chancellor's Advisory Council on Diversity, Equity, and Inclusion
  - Provide training to faculty, staff, and students as the USF Safe Zone Facilitator team member (LGBTQ+)

### **Department of Veterans Affairs, Work-Study** **University of South Florida Sarasota-Manatee**

**Jun 2017 • June 2018**  
**Sarasota, FL**

- Assisted 200+ student veterans, dependents, and families obtain & maximize all facets of G.I. Bill benefits



- Aided over 50 students with the filing of claims for VA benefits while explaining the process such as VA Form 22-1990, VA Form 22-1990t, VA Form 22-1995, VA Form 22-5490, and VA Form 22-5495
- Administered veteran students' educational benefits for all different chapters of the GI Bill, while making sure they understand the differences and assist them in completing the paperwork correctly

**Department of Veterans Affairs, Work-Study**

**Sep 2015 • Jun 2017**

**Department of Veteran Affairs Vet-Center**

**Sarasota, FL**

- Assisted with the preparation, completion, and filing of VA intake forms, documents, and folders for clients
- Provided information to veterans, dependents, caregivers, and fiduciaries on the different services provided by the Vet Center, including eligibility requirements
- Provided referrals and connections to other VA or community resources, benefits, and services

**Chief Financial Officer, Student Government Association**

**Jun 2016 • May 2017**

**University of South Florida Sarasota-Manatee**

**Sarasota, FL**

- Directly responsible for a budget of \$1,195,106.00 for over 30 clubs and organizations
- Managed the budget for purchasing, expenses, and allocations of funds by approving 500-payment requests, and adjusting over 100 requests totaling \$283,000

**United States Marine Corps**

**Company First Sergeant**

**Jan 2016 • Present**

- Senior enlisted advisor in charge of one company comprised of three service departments
- In charge of 40 supervisors and managers. Responsible for the professional development, career progression, education benefits, and transition readiness for over 280 Marines active and Reserve

**Command Financial Specialist advisor/counselor (collateral duty)**

**Jan 2015 • Present**

- Instructed 624 Marines on financial education in order to achieve personal wealth and financial stability

**Lean & Six Sigma Project Manager & Trainer (collateral duty)**

**Jan 2015 • Present**

- Conducted three projects as a lead Green Belt. Expedited customer support, increasing efficiency and performance of personnel by 55%. Identified and removed over \$500,000 of goods for relocation via DLA, and 20,000 lbs. of scrap gear/equipment
- Instructed ten classes and certified over 260 students to Yellow Belt Lean & Six-Sigma

**Assistant Operations & Training Manager / Logistics & Budget Planner**

**Sept 2014 • Sept 2015**

- Developed and implemented strategies and plans for logistics services support for a military exercise of over 13,000 personnel and \$2.5M worth of equipment

**Director of Logistics & Operations, Regional Senior Manager**

**Aug 2013 • Aug 2014**

- Advisor to the Commanding General on tactical logistics support to over 25,000 personnel, to include top-secret level briefings and status reports from approximately 20 organizations and 6 General Service's capabilities
- Task organized and managed 3 dining facilities throughout Regional Command South West Afghanistan sustaining 3000+ US & coalition forces, & DoD civilian enablers

**Assistant Director of Logistics & Operations**

**Jan 2013 • Aug 2013**

- Senior Leader & Advisor to the company Director with over 250 employees
- Mentored and instructed 20 managers and 150 workers on all aspects of their professional development and responsibilities

**Human Resource Manager**

**Jun 2012 – Jan 2013**

- Assisted and advised the Company Commander and 1stSgt in planning, coordinating, and supervising activities which support Food Service Company's Mission
- Successfully ensured that all annual training standards were met for 180+ Marines.

**Operations & Training Manager and Logistics Planner**

**Jun 2011- Jun 2012**

- Generate and submit to higher headquarters' all operational requests and administrative requirements for students, permanent personnel and employees

- Tracks permanent personnel records to ensure all are current in required annual training, qualification, and Professional Military Education (PME)
- Served as a group leader for 86 students during their final training event

**Senior Trainer & Instructor**

**Sept 2008- Jun 2011**

- Responsible for the overall performance, proficiency, and conduct of training of over 261 recruits
- Supervised the platoon's academic training achieving an overall platoon average of 99.17%, 90.66%, exceeding the Regimental average for Final Academic Testing

## **VOLUNTEER**

**Board Member & Chair**

**Sarasota County Veterans Commission**

**Dec 2015 • Present**

**Sarasota, FL**

- Supported and collaborated with Gulf Coast Community Foundation, Affordable Housing Initiatives Fund, Concerned Veterans of America, SRQ Vets, and St. Vincent De Paul for the City of Sarasota to convey the title of City-owned Parcels to St. Vincent De Paul CARES for the development and subsequent rental of apartment units to low-income veterans, housing 10-20 veterans
- Provide direct or indirect support and assistance to homeless veterans
- Provide assistance and support to all veterans, dependents, and veteran organizations within Sarasota
- Conduct board meetings and public meetings to inform the community on any changes and/or updates to include benefits affecting veterans coming from the city, county, federal agencies, and the VA
- Establish and maintain the budget, expenses, and distribution of funds, including fundraising and grants
- Organized, planned, and managed both the Memorial Day and Veterans Day Parade
- Planned and managed Veterans week, job fairs, conferences, symposiums, ceremonies, and events that support our veteran and community population
- Involved in the Veterans Stand Down for both Sarasota County and Manatee County
- Extensive direct involvement with community partners, groups, and organizations across the Sarasota, Manatee, and Tampa area
- Communicate with government officials, governors, senators, congressman, state representatives, county and commissioners, and the Florida Department of Veterans Affairs and all issues pertaining to veterans



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## MICHAEL A. TOLLERTON

### PROFESSIONAL SUMMARY

Motivated, highly ambitious, and detail-oriented leader with solid experience managing all levels of large-scale projects and personnel. Technologically-savvy with outstanding relationship building and networking skills.

### EDUCATION

#### **Florida State University (2022)**

MBA- Business Analytics Concentration

#### **United States Military Academy at West Point, NY (2011)**

**Bachelor of Science:** International Relations (Computer Science)

### EXPERIENCE

#### **RISK CONTROL OPERATIONS (FEB 2021-Present)**

**FCCI Insurance Group, Sarasota, FL**

- Provide governance and corporate oversight for Risk Control Department activities across six regions.
- Provide data analysis, metric development and create reports to achieve business objectives.
- Accountable for planning and allocating resources, preparing budgets, monitoring progress, and reporting on all process improvement projects as project manager.
- Selected to join a 3-person team to implement new Excess and Surplus product line.

#### **PRODUCTION SUPERVISOR (JAN 2019-DEC 2020)**

**Georgia-Pacific, Albay, GA**

- Lead and trained operations team of 15 personnel to meet production KPIs during lumber mill start-up. Team produced profit within the first quarter with only 64% staffing.
- Assisted plant leadership to strategically forecast inventory and manage the supply chain. Leads cross functional teams in cost reduction, quality, and efficiency improvements.
- Established Combustible Dust compliance program for the start-up of GP Lumber mill. Ensured safety and environmental compliance are within governmental and corporate standards.

#### **OPERATIONS LEADER (JAN 2017-DEC 2018)**

**Conmed, Largo, FL**

- Led four medical device factories and oversaw quality, productivity, cost, safety, and employee engagement to achieve key business initiatives with cross functional teams.



- Managed factory budget for the Business Unit Manager, considering thresholds for PO approval, head count, and expense projections, and budget attainment (absorption, efficiency, variance, scrap, overtime, earned hours material expense)
- Managed training compliance and talent development for over 100 direct reports.
- Planned, designed, and lead three business process improvement projects totaling \$100,000 in savings.

#### **OPERATIONS OFFICER (JUL 2015-JAN 2017)**

**US Army, Lawton, OK**

- Responsible for the coordinating logistical and administrative operations for 6 basic training units (1500 personnel). Manager of a 5-person team that researched, prepared, and published operational plans, taskings, and official presentations for the organization.
- Created and managed outreach program with local schools, military programs, and recruiters to improve community relationships and inspire future leaders.
- Served as key advisor and subject matter expert for Senior Manager of 800 personnel unit on all operations, training, and initiatives within the unit.

#### **BUDGET COMPTROLLER (OCT 2014-JUL 2015)**

**US Army, FT. Lewis, WA**

- Chosen from 3 candidates to serve as principal advisor to the Senior manager of 1500 personnel and his staff on budget preparation and resource management.
- Developed, evaluated, and maintained responsibility for \$3.1MM budget and Program Objective Memorandum (POM), a recommendation to the Secretary of Defense concerning resource allocation.
- Established policies and procedures for developing and implementing the command budget within fiscal/regulatory constraints, ensuring a surplus in Q4, allowing the unit to lead all other base units.

#### **US AIR MOVEMENT OFFICER (JUN 2013-OCT2014)**

**US Army, United Arab Emirates**

- Responsible for training and supplying a 320 person unit, during deployment and redeployment, with equipment valued over \$30MM with zero losses or damages.
- Coordinated 5 joint international live fire exercises with personnel, equipment, and ammunition that directly increased US readiness and foreign relations while building relationships with foreign staff and militaries to ensure strategic objectives.
- Created standard operating procedures for preparation, coordination, compliance, and execution of US Army movements on the coalition joint airbase.

#### **ARTILLERY ROCKETS AND AMMUNITION PLATOON LEADER (JAN 2012 – JUL 2013)**

**US Army, FT. Lewis, WA**

# Parent Teacher Cadet Council



## 2023/24 Council Members

<b>Staff Representative:</b>	Angela Cohen	<b>Cadet Council Program Liaison:</b>	Jeannie Whipple
<b>President:</b>	Brenda Canales	<b>Volunteer Coord:</b>	<b>Open</b>
<b>Vice Presidents:</b>	<b>Open</b>	<b>Merchandise Coord.:</b>	Amber Martin
<b>Secretary/Grant Coord:</b>	<b>Open</b>	<b>Calendar/Events Coord.:</b>	Nathalie Knipfer
<b>Treasurer:</b>	Liz Bonnett	<b>Event Assistant:</b>	Holly Wesner
<b>Social Media:</b>	Karen Medina		
<b>Cadet:</b>	Hannah Monahan (HS)		

### What's New:

- **Recruiting for PTCC Members** for 23/24 Year - Currently we have 70 interested parents to reach out to.
- **Cadet Council Program-** Operating as the student body in leading events.

### Event Recap:

- Spirit Wear Sales are booming!

### Upcoming Events:

#### September

- **SPIN Night** - High School Campus
- **Cross Country Meet** - SMA Middle

#### October

- **Wreaths Across America Campaign**

Stay tuned for more planned events.

### Grant and Donation Summary:

#### Approved by Grant Committee (December)

Proposed Annual Budget = \$13,000  
(\$500ea per semester/per Dept.)

Location	Requested	Approved
High	1	1
Middle	0	0

**Total Amount for FY'23/24: \$500.00**

*NOTE: All grants are forwarded to the Finance Dept. for final approval.*

August 25, 2023