

**SARASOTA MILITARY ACADEMY
BOARD OF DIRECTORS
Tuesday, August 26, 2025**

- Call to Order
- Pledge of Allegiance
- Approval of the Minutes -Tab 1
 - June 24, 2025
- Head of School Report – SMA Prep Tab 2
 - Faculty Representative
- CEO/Head of School Report – SMA High Tab 3
 - 2025-2026 Employee Handbook Approval
 - Athletic Director Report
 - Faculty Representative
- SAI Report - Tab 4
- Treasurer’s Report - Tab 5
 - Monthly Financial Report
- Committee Report – Tab 6
 - Nominating Committee
 - Facilities Committee
 - PTCC
- Chairperson’s Report
- Old Business
- New Business
- Public Comment
- Meeting Adjournment

SARASOTA MILITARY ACADEMY

BOARD OF DIRECTORS ANNUAL MEETING MINUTES

24 JUNE 2025

Board of Director Members' Attendance

Present:

Dr. Thomas J. McElheny, Former Capt, USMC, Chair
Erica Gregory, Lt Col, USAF (Ret), Vice Chair
Ben Knisely, COL, USA (Ret), Secretary
Pete Skokos, Treasurer (virtual)
Scott Lempe, Lt Col, USAF (Ret) (virtual)
Jerry Neff, BG, USA (Ret)
Charles Shugg, Brig Gen, USAF (Ret)
Ron Skipper, Former Capt, USAF
Richard Swoope, COL, USA (Ret)
Michael Tollerton, Former CPT, USA

Absent: Brent Bogart, Former LT, USN; Heather Koester, Former SGT, USAR; Carlos Moreira, 1st Sgt, USMCR; MAJ (Ret) Russ Osterfeld, SAI; SMA-MAJ Charlie Carver, Athletic Director; SFC Ernesto Ramirez, HS Faculty Representative; SMA-CPT Ellie De Murias, MS Faculty Representative

SMA Administrative Staff in Attendance:

SMA-COL Christina Bowman, CEO/Head of High School
Dr. Cheryl Korwin, Head of Middle School
SMA-LTC Bryan Burns, Assistant Head of Middle School (virtual)
SMA-LTC Caitlin West, Assistant Head of High School;
SMA-LTC Abby Williams, Assistant Head of High School (virtual)
SMA-LTC Steve Kok, Director of Finance

Guests in Attendance: Regt S1 Samuel Bonser; Ms. Nikki Orth

Location: SMA High School

The chair called the meeting to order at 2:30 pm.

Chair Thomas McElheny started the Pledge of Allegiance.

Motion to Approve the 29 April 2025 Minutes:

COL Ben Knisely moved to approve the 29 April 2025 minutes; BG Jerry Neff seconded the motion and the board unanimously approved.

Head of Middle School Report: Dr. Cheryl Korwin provided a read-ahead report. She mentioned filling positions and making positive changes for the upcoming school year. Dr. Korwin stated one positive change is to focus more on the military culture with emphasis to military core values and the Leadership in Me values. Chair McElheny requested additional information on the Leadership in Me program.

CEO/Head of High School: SMA-COL Christina Bowman provided a read-ahead report. She mentioned currently filling up a few more positions, as well as addressing campus needs to be completed during the summer prior to first day. SMA-COL Bowman mentioned site visits from Mussman Architects went well and anticipating a first draft on campus improvements.

SAI Report: N/A

Treasurer's Report: SMA-LTC Steve Kok provided a read-ahead report. He discussed balance sheets for both campuses using the new budget format and FTE based on enrollment for both campuses. SMA-LTC Kok discussed the additional expenses with upgrading technology and air-conditioning units. Chair McElheny discussed the possibility of a salary raise based on final enrollment numbers. Brig Gen Charles Shugg stated to consider a raise if it is substantial, more than 1%. COL Knisely inquired as to a bonus over a raise, to which SMA-LTC Kok replied that a bonus was given utilizing ESSER funds, but that has since stopped so a raise would have to be decided.

SMA-LTC Kok presented the standard profit and loss budget to the board for approval.

Mr. Ron Skipper moved to approve the standard profit and loss budget; Mr. Pete Skokos seconded the motion and the board unanimously approved.

PTCC Report: SMA-COL Bowman stated she met with the new PTCC President and Treasurer to discuss the events for the school year with focus on Wreaths Across America and other community outreach.

Chair Report: Chair McElheny discussed the purpose on deriving the cost of building a new campus or upgrading the existing one and through additional research has decided to step back from Michael Saunders and the pursuit of new campus at this time. He mentioned discussions on different funding approaches that would be available. Chair McElheny stated the need to schedule a board workshop on the future of SMA in August. He discussed the two elements that will dictate the success of SMA for the future; first being student achievement, and second a formalized, synchronized, coordinated military base character and leadership development program.

COL Ben Knisely moved to approve the nominations of current board members and positions for next fiscal year; Mr. Skipper seconded the motion and the board unanimously approved.

SMA-COL Bowman presented the renewal of the annual conflict of interest policy.

Mr. Skipper moved to approve the proposed 2025-26 SMA Board Meeting Schedule; Ms. Michael Tollerton seconded the motion and the board unanimously approved.

Mr. Skipper moved to approve the 2025-26 Mental Health Allocation plan for submission to the district; BG Neff

Mr. Skipper moved to approve the 2025-26 draft Comprehensive Evidence-Based Reading plan for submission to the district; BG Neff seconded the motion and the board unanimously approved.

Old Business: N/A

New Business: N/A

Public Comments: Regt S1 Samuel Bonser shared the current needs of the athletic program and ways the board can provide support.

Board Comments:

The next board meeting will be on 25 August 2025 at 2:30pm at the High School campus.

The chair adjourned the meeting at 3:19pm.

Dr. Thomas McElheny, Chair

Date

COL Ben Knisely, Secretary

Date

SMA Prep Read Ahead

Board of Directors Meeting

August 25, 2025

From: Dr. Cheryl Korwin, Head of School – Middle School

Enrollment

6th Grade: 123

7th Grade: 126

8th Grade: 138

Total: 387

Due to staffing allocations, we are operating on a **waiting list system**, meaning a cadet must withdraw before a new cadet may enroll.

School Year Launch

- The **opening of the school year** was smooth and well-received.
- **Clear backpacks** have been highly effective, contributing to both safety and efficiency.
- **New schedule** implementation has been positive, with the first **period dedicated to Character, Leadership, and the Army Core Values**.
- Instruction in **Leader in Me principles** and **Executive Skills** has been seamlessly integrated into the morning curriculum.
- All cadets received direct instruction on the **Cadet Handbook** and **use of their agenda**, ensuring clarity of expectations and organizational skills.
- **Orientation Nights: Approximately 75% of families attended.**
 - Families received a clear overview of SMA's expectations, standards, and academic programs.
 - Staff members generously volunteered additional time to support these events.
 - **Cadet Boot Camp:** Provided new cadets with essential orientation in SMA culture, formation, and behavioral standards—setting them up for early success.
- Cadets are demonstrating **greater responsibility** in caring for their environment:
 - Lunch areas are cleaner.
 - Trash is being disposed of properly.
 - Restrooms are better managed with the implementation of **SmartPass**.
- The implementation of **three separate lunches** has been highly effective:
 - Reduced wait times.
 - Elimination of tardiness following lunch.
 - Maximized instructional time.

Staffing

New team members include: Math Teacher, ELA Teacher, AgriScience & Math Teacher, Front Desk Administrative Support Professional

Academic Updates

- **Progress Monitoring (FAST) Testing** begins next week in both **Mathematics** and **Reading**.

Overall Outlook: SMA Prep has launched the 2025–26 school year with budgeted enrollment, smooth operations, and a culture of excellence. Engagement from families, alignment with SMA's core values, and early academic focus ensure a positive trajectory for the year.

High School Head of School
CEO Report
August 26, 2025

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:**
 - Academy Enrollment 962/SCSB 970 (-8)
 - 2025-2026 Budget 944 (+18)
 - High School: 575/SCSB 582 (-7)
 - Class Size: 22
 - 2024-2025 20
 - SCF Fall Semester: 15 13 FT 2 PT
 - STC: 24
 - OJT: 6
 - Prep: 387/SCSB 388 (-1)
 - Class Size: 22
 - 2024-2025 19
 - 60 % 8th Grade to 9th Grade
- **College, Careers, and Citizenship**
 - 2024-2025 School Grade: C
 - Academy Goals: Tentative
 - Met 2024-2025 Goal to Increase ELA Learning Gains Lowest 25th Percentile from 56%-60%
 - 2025-2026 Goal to Increase ELA Learning Gains Lowest 25th Percentile by 4% from 60% to 64%
 - Did not meet 2024-2025 Goal to Increase Math Lowest 25th Percentile from 56% to 60%
 - 2025-2026 Goal to Increase Math Lowest 25th Percentile from 46% to 56%

- **Character and Leadership Development**

- Medal of Honor Conference

- August 1, 2025

- Attendees: Dr. McElheny, Ron Skipper, Angela Cohen, Major Osterfeld, Dr. Korwin, Billie Hodges

Communication/Community Outreach:

- Labor Day: September 1, 2025 Campuses Closed

- Veterans Day Parade: November 11, 2025

- Next Meeting: September 23, 2025 2:30 pm High School Campus

Sarasota Military Academy Employee Handbook



2025 - 2026

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Sarasota Military Academy, Inc.

Employee Handbook

Section 1: Basics

OUR MISSION

Combining extraordinary academics with the highest military principles of camaraderie, focus, leadership, integrity, compassion, poise, honor and respect, SMA's mission is to graduate young men and women who will confidently define their personal and unique goals for success in a multi-cultural and globalized world.

OUR VALUES

HONOR SMA Cadets embrace the challenge of bringing honor to themselves, their families, their communities and the United States of America.

INTEGRITY We share a fundamental belief that doing the right thing is always the right choice. To SMA Cadets, accountability for behavior and decision-making is an expectation that is embraced.

RESPECT Our cadet culture instills personal, social and patriotic respect, demonstrated with confidence through courtesy, politeness, kindness, and consideration for others.

THANK YOU. Thank you for being part of the Sarasota Military Academy (the Academy). We hope your career is enjoyable and rewarding. We understand the value of your work and appreciate your commitment to our Academy and the cadets' success.

HANDBOOK BASICS. The Academy provides this handbook or policy manual as an overview of the Academy's employment-related policies and philosophies.

Specific departmental or personnel policies also apply and provide additional relevant information. Some of these policies are required by the Sarasota County Public School District ("District"). Some are required by the Department of Education ("DOE"). Others are specific to the Academy. Please read this handbook and any additional departmental or personnel policies provided to you.

Everyone. The handbook applies to all employees of the Academy. The handbook is intended to clearly communicate the expectations and basic requirements of our work together.

Please Read and Understand. It is important that you read and understand each personnel policy.

OPEN DOOR POLICY

Sarasota Military Academy is committed to administering policies, procedures and work operations fairly. Your questions, concerns, or problems about issues that affect your work are important to us.

Direct, professional communications are the most likely to succeed and build professional relationships. You are encouraged to talk to your immediate supervisor/manager about any problem or concern that is related to your work. Many concerns can be addressed and resolved by open communication with your supervisor/manager. It is important to try and to resolve issues as soon as they arise, so concerns don't escalate.

If you are not comfortable addressing a concern with your supervisor or manager, you should discuss the situation with your Head of School. If the concern still needs to be addressed further, you should reach out to the CEO. It is important to follow the steps of who to discuss concerns with first before escalating issues to a higher level.

Always Improving. We have not anticipated every situation or question. Unwritten practices also develop. The Academy endeavors to adapt employment policies to changing needs. Therefore, we reserve the right to amend, supplement, or rescind any policy or any provision as deemed appropriate, whether or not in writing. We strive to provide notice within a reasonable period of time following a policy change. Until you receive notice of a change, you should comply with the most recent, most specific policy. This handbook replaces all prior employee handbooks. Feel free to direct any policy questions to CEO.

At-Will. Providing these written policies is an attempt to be clear and fair regarding basic expectations and practices. The handbook does not list every condition and requirement of employment, does not promise to employ anyone for a set length of time or pursuant to set terms, conditions, or benefits, does not affect the at-will nature of employment, and is not an employment contract. Under Florida law, at-will employment means that you or the Academy may terminate the employment relationship at any time, for any reason that is not prohibited by law, with or without notice, and with or without cause. The Academy will comply with all legal requirements regarding the termination of employees and will not make employment decisions on any basis that is prohibited by law.

Follow the Law, Charter, and District Requirements. The handbook and all policies of the Academy should always be interpreted to require full compliance with the law, the Charter, and applicable District policies in every situation at every level. If there is ever a question regarding the application of a District policy, please see the CEO.

Right to Modify. The Academy retains the right to lawfully modify, alter, delete, add, or waive any and all employment policies at its sole discretion, with or without notice. No revision will result in SMA's violation of laws protecting employee rights.

Please Sign the Form. It is required that each employee sign the attached acknowledgement form at the end of this handbook acknowledging that you have read, understand, and intend to comply with these policies.

Any Questions? If there is ever a question about the status or interpretation of a particular policy, whether written or unwritten, please ask. Unless otherwise stated, the Academy leadership administers the policies in this handbook. Throughout this handbook, employees are directed to communicate with various Academy representatives. The titles, names, and contact information for the referenced representatives are listed on Appendix 1 to this handbook and updated in the Office and on the website. If anyone referenced is unavailable, please contact the CEO for assistance in identifying the correct person to address your concern.

Section 2:

BUILDING AND RETAINING OUR TEAM

RECRUITING

Recruiting and retaining talented, committed, and engaged staff members in the right roles is critical to our Cadets' and to the Academy's continued success. The focus is on hiring the most qualified person for each role and ensuring that decisions are based on appropriate considerations and not motivated by protected characteristics or protected conduct (as defined below). Everyone involved in recruiting or hiring on the Academy's behalf must understand and comply with this our Equal Employment Opportunity Policy.

EQUAL EMPLOYMENT OPPORTUNITY

The Academy values and is dedicated to equal employment opportunity. It is the continuing policy of the Sarasota Military Academy to promote equal opportunity for all employees and applicants for employment. To this end, the Academy will continue to recruit, hire, train and promote the most qualified persons in all job classification without regard to race, color, religion, gender, national origin, marital status, age, disability, genetic information or sexual orientation.

Employees or job candidates who are or become disabled within the meaning of the Americans with Disabilities Act will be reasonably accommodated if such accommodations will otherwise permit the employee or candidate to perform the essential functions of the job which the employee holds or the candidate seeks.

Employment and promotional decisions will be made in accordance with the principles of equal employment opportunity, which afford equal opportunity by imposing only valid, job-related tests and requirements for employment or promotion. Personnel actions, including compensation, benefits, transfers, layoffs, return from layoff, *Academy sponsored training, education, discipline and evaluation, are administered without regard to protected characteristics or protected conduct* (defined below).

- **Protected Characteristics.** As used in this policy, *protected characteristic* means:
 - Race,
 - Color,
 - Religion,
 - Gender,
 - National origin,
 - Marital status,
 - Age,
 - Disability,
 - Genetic information,
 - Sexual orientation, or
 - Any other characteristic protected by federal, state, or local law or ordinance.

- **Protected Conduct.** As used in this policy, *protected conduct* means the good faith exercise of legal rights, including:
 - Taking legally protected leave, including military, jury duty, workers' compensation or other legally protected leave,
 - Engaging in whistleblower conduct,
 - Seeking or receiving an accommodation provided by law,
 - Filing a workers' compensation claim relating to a work-related illness or injury,
 - Filing bankruptcy,
 - Military service,
 - Engaging in protected concerted activity, or
 - Any other conduct protected by federal, state or local law.

GENETIC INFORMATION NON-DISCRIMINATION

The Academy will not request, require, or consider genetic information from employees, candidates, applicants, or their family members for purposes of making employment-related decisions.

EMPLOYMENT REPRESENTATIONS

Employment representations must be truthful.

Our credibility and success as an Academy are dependent upon our employees' credibility and success. Honesty and candor relating to qualifications, experience, skills, performance, absences, status of work, interactions with Cadets, compliance with policies, and any other business matters are imperative. Any misrepresentation or material omission in violation of this policy constitutes Misconduct.

DISABILITY ACCOMMODATION

The Academy requires full compliance with the Americans with Disabilities Act (ADA). The Academy prohibits discrimination against disabled applicants and employees and seeks to provide reasonable accommodations of all qualified applicants and employees' disabilities where doing so does not result in undue hardship on the Academy.

Reasonable Accommodation Requests We invite applicants and employees to request reasonable accommodations and engage in an interactive process to try to identify reasonable accommodations that may be available. Requests for reasonable accommodations will be evaluated according to the requirements of the Americans with Disabilities Act (ADA).

- If a reasonable accommodation is needed to perform the essential functions of your position, please initiate your request through the CEO.

Response. If a response is not received in 7 days, or you disagree with the response, please provide the request in writing to the CEO.

Genetic Information. If providing medical information to the Academy, please review and comply with the Genetic Information Non-Discrimination policy.

RELIGIOUS ACCOMMODATION

The Academy prohibits discrimination against and seeks to provide reasonable accommodations of all qualified applicants' and employees' sincerely held religious beliefs. For example, an accommodation may include taking an unscheduled day off for a religious holiday, or a modification to our dress code.

In accordance with federal and state laws, the Academy prohibits discrimination on the basis of religion. The Academy provides reasonable accommodations for employees' sincerely held religious beliefs or practices unless doing so would impose an undue hardship on the Academy. A reasonable religious accommodation is any adjustment to the work and/or *academic environment that will allow the individual to practice his/her religion without undue hardship* to SMA. "*Undue hardship*" is a practice, procedure, or financial cost which unreasonably interferes with business operations at the Academy.

A sincerely held religious belief is defined as a belief or practice that is sincerely held with the strength of traditional religious views, including moral or ethical beliefs as to what is right and wrong. Personal preferences and social, political, or economic philosophies that do not meet this definition would not qualify. If you have sincerely held religious beliefs that may require an accommodation, please contact the Director of Human Resources or the CEO.

IMMIGRATION COMPLIANCE

The Academy is committed to compliance with immigration laws. Under immigration law, we are able to employ only United States citizens and non-citizens who are authorized to work in the United States.

The Academy does not discriminate on the basis of citizenship or national origin.

In compliance with the Immigration Reform and Control Act of 1986, each new employee, as a condition of employment, must complete the Employment Eligibility Verification Form I-9 and present documentation establishing identity and employment eligibility. Employees who are not US citizens or permanent residents and who used documents with expiration dates to establish their right to work in the United States, will be required to recertify their right to work based on such expiration dates.

Former employees who are rehired must also complete the form if they have not completed an I-9 with the Academy in the past three years or if their previous I-9 is no longer retained or valid. Employees may raise questions or complaints about immigration law compliance without fear

of reprisal. Please also review the Anti-Discrimination policy contained in this handbook for related information.

POSITION DESCRIPTION

Each position in the Academy has a written job description. The description includes the: purpose of the position, areas of duty and responsibilities, to whom the position reports, and the required qualifications. If any employee perceives a need to update a job description, please communicate the details to be updated to the CEO.

INTERNAL HIRING PROCESS

Sarasota Military Academy is committed to the professional growth and development of our employees. We prefer to give our employees the first opportunity to be considered for a job that becomes available within our Academy. When a new or open position is identified, the Director of Human Resources sends an email to all employees at both SMA campuses notifying all staff of the job opening. It will include the job description for the position along with any other relevant information (hours, days, location). The job will be posted internally for 5 business days (one work week). Internal candidates must be employed with SMA for at least 6 months before posting for another job. When interested in a newly posted position, the employee must first notify the employee's Head of School of the desire to apply. External advertising for the position may begin during the internal posting period, but qualified internal candidates will be considered and interviewed prior to interviewing external candidates.

If an employee has an interest in the position they must submit a cover letter, resume and if necessary a Teaching Certificate, Temporary Certificate, or Letter of Eligibility (for all teaching positions) by 5:00 p.m. on the closing date of the posting. Exceptions to the deadline will not be allowed, unless there are extenuating circumstances. Once candidates apply and are qualified, the appropriate school personnel will offer the opportunity to interview. The employee candidate will be provided advance notice of the date, time and location of the interview.

Employees seeking new positions within SMA should be prepared to interview for the desired positions. Internal candidates should present as professional applicants, including wearing interview attire and being on time for interviews. SMA dress uniforms are acceptable for interviews.

SMA interviewers are required to make employment recommendations and decisions based only on lawful considerations. SMA's goal in hiring is to hire the most qualified candidate with the greatest likelihood of success in the position.

If an internal candidate is selected, the Head of School will communicate an offer. If the candidate accepts the offer, the candidate should be released from his or her current position within 1 month (unless there are extenuating circumstances). If there is any change in compensation, the change would be effective upon completely transitioning to the new position. There will be a 90 day probationary period in the new position. The employee's job performance in the new position will

be formally evaluated after completion of the 90 day probationary period.

Any internal candidates who are not selected for an open position for which the candidate interviewed will be offered a meeting with the Head of School to discuss the decision and actions the employee could take (educationally, additional training, etc.) to be qualified for other positions.

EMPLOYEE REFERRAL PROGRAM

SMA knows that our own employees are the best source of knowing who would be a person with the skills and experience we look for in new employees. To further that end, SMA has an Employee Referral Program that provides employees a Referral Bonus if all of the following conditions are met.

1. The referring employee refers a Successful Candidate to SMA by delivering an Employee Referral Form, the candidate's cover letter, and the candidate's resume to the Director of Human Resources before SMA receives any communications from or regarding the candidate.
2. When the candidate applies for the position, the candidate mentions the referring employee's name.
3. SMA hires the referred candidate for the position sought and both the hired candidate and the referring employee remain employed at SMA in good standing on the Referral Bonus Payment Dates.

Referral Bonus Amounts:

- For each Successful Candidate hired into non-exempt (hourly) position, the referring employee will receive \$125.00.
- For each Successful Candidate hired into a salaried position, the referring employee will receive \$250.00.
- Referral Bonus Payment Dates.
 - 50% of the Referral Bonus will be paid three (3) months after the start date of the referred employee.
 - 50% will be paid upon the new hire completing six (6) months of service.

RELATIONSHIPS OUTSIDE OF WORK/NEPOTISM

The Academy strives to provide a workplace free of favoritism and is committed to avoiding conflicts associated with romantic and family relationships in the workplace. There is no desire to interfere with the private lives of its employees or their off-duty conduct that does not impact SMA. However, where such conduct or relationship is determined to negatively impact the work environment or have the potential for doing so, the Academy reserves the right to make all changes deemed appropriate to address and resolve the issue.

All employees are responsible for maintaining a professional environment and reporting any familial or romantic/dating/ or similar relationships with Academy employees or contractors.

Employees or contractors who are related or are involved in a romantic/dating/or similar relationship are prohibited from having a direct or indirect supervisory relationship over the other. Such an intimate relationship between individuals who have direct or indirect supervisory relationships is highly inappropriate. If such a situation develops, each involved employee must immediately advise the CEO.

The Academy retains complete discretion to determine whether an outside relationship impacts or has the potential for impacting the Academy and to make any changes in the employment of the Academy employees, including rejecting an application, changing the duties, or potentially ending the employment of an employee, depending on the circumstances.

Violating of this policy, including failing to timely report the covered relationship, constitutes Misconduct, and will result in disciplinary action up to and including termination of employment

FACULTY PROFESSIONAL CERTIFICATION AND DEVELOPMENT

Faculty members are required to meet all state and local District hiring criteria, including having a bachelor's degree, and a current teaching certificate or an approved letter of eligibility. Copies of certification certificates and letters of eligibility will be maintained in personnel files.

In cases where the instructor is considered an "expert in their field" and is teaching a specialty class, the Academy CEO will consider whether hiring is consistent with the Mission and Charter.

All staff members are encouraged to continue to learn through professional development.

SMA does not pay for or compensate team members for unapproved or *personal* professional development. Any team member seeking unapproved or personal (not SMA-provided or supported) development, should do so on their time at their personal expense; if time is needed during the duty day, PTO should be requested in advance.

OUTSIDE EMPLOYMENT

Prior to accepting outside employment other than employment that is protected by law such as military duty, please communicate with the CEO to ensure that the outside employment will not negatively affect your work at the Academy.

NEW EMPLOYEE ORIENTATION

All employees must attend orientation prior to teaching at the Academy.

The CEO, or designee, will conduct New Employee Orientation with each newly hired staff member to collect required paperwork, present information regarding benefits, and to go over the Employee Handbook. All employees will be required to read the employee handbook and sign the final page indicating they have read and agree to comply with all points covered in the Employee Handbook.

SUBSTITUTE ASSIGNMENTS

All substitutes must have a complete resume and cover letter on file along with all required employment forms. Substitutes are required to complete a criminal background check and drug test prior to employment. The drug test must have a negative result and the background check results must demonstrate that the substitute's background is acceptable to be employed by SMA in the position sought. Each new employee must attend New Employee Orientation. Substitutes shall perform the major functions and duties of the classroom teacher in a professional manner. Faculty members are requested to provide candid feedback regarding substitutes to the Heads of Schools.

Section 3:

EMPLOYMENT CATEGORIES & CLASSIFICATIONS

EMPLOYMENT CATEGORIES

Introductory Employee

An Introductory Employee is an employee who has not completed the Introductory Period (the first 90 days of employment) with the Academy.

- The 90-day Introductory Period is intended as a trial basis for both the Academy and the employee to determine whether each meets the other's expectations.
- Full-time Introductory Employees are entitled to participate in the Academy's benefit programs pursuant to the requirements of the various plans.
- An Introductory Employee is entitled to resign at any time, and the Academy may terminate an Introductory Employee's employment at any time.
- Introductory Employees may be salaried or hourly depending on the position.
- Completion of the Introductory Period does not guarantee the employee any specific duration of employment. The employee remains an at-will employee during the entire employment relationship with the Academy.

Temporary Employee and Substitutes

A Temporary Employee (including a Substitute) is an employee hired to temporarily replace an employee on leave, to temporarily supplement the work force, or to assist in the completion of a specific project with an anticipated ending point.

- Unless expressly notified of a change in employment status, employment beyond any initially planned period does not imply a change in temporary employment status.
- While Temporary Employees receive legally mandated benefits (such as Social Security and Workers' Compensation Insurance), Temporary Employees are ineligible for the Academy's other benefit programs unless they otherwise meet the benefit plan's specific written requirements.
- Temporary Employees are compensated as hourly/non-exempt employees and are eligible for overtime.
- Employment assignments in this category are of a limited duration.
- A substitute teacher working in excess of four consecutive weeks in the same classroom is referred to as a "Long-term Substitute" and is provided benefits to the extent described in the applicable plans in effect.

Full-Time Employee

A Full-Time Employee is an employee who is not a Temporary Employee, has completed the 90 day Introductory Period, and regularly works thirty hours or more per week.

- All policies in this handbook apply to Full-Time Employees unless otherwise stated.
- Full-Time Employees may be salaried or hourly depending on the position.

Under the Fair Labor Standards Act employees are categorized as either exempt or non- exempt. Exempt employees are salaried employees and not eligible for overtime. Further information can be found in the Exempt and Non-exempt Classification Requirements in this handbook. Non-exempt (hourly) employees are paid overtime.

Part-Time Employee

A Part-Time Employee is an employee who is not a Temporary Employee, has completed the 90 day Introductory Period, and does not regularly work the hours required to qualify as a Full-Time Employee,

- While Part-Time Employees receive legally mandated benefits (such as Social Security and Workers' Compensation Insurance), Part-Time Employees are ineligible for all of the Academy's other benefit programs unless they are scheduled to consistently work thirty or more hours weekly and otherwise meet the particular benefit plan's written requirements.
- If a Part-Time Employee perceives that the employee's regular work hours have increased to define the employee as a Full-Time Employee, the employee should immediately notify the Director of Human Resources of the perceived change.
- Part-Time Employees may be salaried or hourly depending on the position.

Inactive Employee

An Inactive Employee is an employee who is not actively working for the Academy, is on an approved extended leave, and has not been dismissed or reassigned.

- Inactive employment status expires on the earlier of the end of the approved leave or one year unless otherwise required by law.
- Upon expiration of Inactive status, the employee must either request in writing to return to work in a particular position, submit the request and be approved by the Director of Human Resources to be permitted to return to an active position wherein the employee performs the essential functions of the position as required, with or without accommodation, or the employee will be considered to have resigned in good standing.
- Assignments in this category are of limited duration and where applicable in compliance with Federal and State law.
- Other than as required by applicable law, such as the FMLA, or provided in writing and signed by the CEO, an Inactive Employee's leave or status does not constitute protected leave (requiring that the position be held). Depending on the circumstances, an Inactive Employee seeking to return to active status may need to identify and apply for an available position.

Minors

The employment of children under 18 years old must comply with all laws relating to the employment of minors.

Volunteering at Sarasota Military Academy

The Academy appreciates the services performed by its valued volunteers.

To ensure compliance with labor laws the Academy has established the following compliance requirements related to those who volunteer their services to the Academy:

1. Volunteers must be freely offering their services out of a humanitarian, civic, or charitable desire to contribute to SMA or to help the cadets.
2. Employees of the Academy cannot volunteer to perform services similar to their duties.
3. Volunteers are unpaid and not compensated in any other way by the Academy.
4. Volunteers must complete and pass a Level II background check each year and upon request.

Section 4:

DUTIES, CONDUCT AND COMPLIANCE

ESSENTIAL DUTIES OF EACH EMPLOYEE

Each Academy employee is required to strictly comply with the Academy's Conduct and Compliance policies. Failure to comply with each of these Compliance and Compliance policies constitutes Misconduct and may have further disciplinary action up to and including termination of employment.

CONDUCT

Compliance expectations. As an integral member of the SMA team, each employee is expected to comply with all SMA policies, including this Conduct Policy.

Code of Conduct. Each employee has an obligation to manage his or her individual behavior at and relating to work in a manner that

- complies with SMA policies;
- encourages the highest performance standards;
- respects others' rights; and
- enhances and does not detract from the education and environment provided to cadets/students.

Misconduct. Certain conduct is or has the potential to be so detrimental to SMA, employees, or cadets that a single occurrence is likely to result in the immediate termination of the employment relationship. SMA cannot anticipate each such instance, but provides this Misconduct list as clear written notice that each of the following constitutes Misconduct and is a basis for termination of employment, which means that the termination may occur without additional notice or warning.

- Abuse, assault, battery, or threats
- Engaging in criminal conduct, fighting, intimidation, horseplay or provoking a fight toward anyone relating to work;
- Engaging in extortion or other unlawful or unethical conduct;
- Defamation;
- Willful destruction or recklessness relating to SMA or cadet property;
- Insubordination or refusal to comply with guidelines, policies, or procedures of SMA;
- Neglect of duty;
- Breach of essential duties, including the teamwork requirements;
- Lack of application or effort on the job;
- Excessive tardiness or absenteeism or violation of the Attendance Policy;
- Spending unnecessary, unproductive time away from duties during scheduled work, other than time allotted for a designated lunch or break;

- Any willful act resulting in, or creating a risk of, injury to any employee, vendor, cadet/applicant or guest including oneself, or resulting in, or risk of, damage to SMA property;
- Failing to comply with requirements relating to sensitive or Confidential Information;
- Unlawful possession of firearms, weapons, or explosives on SMA property unless the law requires otherwise (SMA may require you to provide proof of lawful possession);
- Use of abusive or obscene language while working, on SMA property, or near cadets;
- Theft or unauthorized possession of SMA property or the property of fellow employees or cadets; unauthorized possession or removal of any SMA property from the premises without prior permission; unauthorized use of SMA equipment or property for personal reasons;
- Dishonesty, falsification, or misrepresentation in connection with employment, including on an application for employment or other work records; alteration of SMA records or other SMA documents;
- Any action that tends to negatively reflect upon SMA's reputation unless such action is legally protected conduct;
- Failure to observe safety rules or regulations, including "horseplay" and the failure to wear proper safety equipment;
- Failure to maintain the qualifications for the position;
- Conducting personal business on SMA time;
- Unauthorized solicitation, posting, distribution, removal, alteration, or defacing of SMA material on SMA property or in any manner; this includes SMA Cadets or families.
- Communicating to or about co-workers, Management, or cadets in an unprofessional, aggressive, or disrespectful manner while at work.
"Moonlighting" on SMA property, during SMA work hours, or using SMA equipment for personal use, without the express authorization of the CEO.
- Breach of any agreement with SMA; and
- Reporting to work unfit for duty or otherwise violating any drug or alcohol policy;
- Failing to exercise control over behavior;
- Inefficiency, unsatisfactory performance, lack attention, or negligent or reckless conduct;
- Violation of any employment policy expressly stating the violation constitutes misconduct
- Failing to meet overall performance expectations; and
- Violation of any other SMA policy or instruction.

Notice/Examples. Please note that the specific forms of Misconduct listed above are examples intended to provide employees with clear written notice regarding these specific acts of Misconduct. It is not an exhaustive list and does not alter at-will employment status.

SMA'S RESPONSE TO EMPLOYEE PERFORMANCE DEFICIENCIES OR MISCONDUCT

Overview. SMA values its team and encourages respectful communications and thoughtful decisions that support SMA's Mission and Values.

This Policy summarizes tools and the framework for exercising administrative discretion regarding employee performance deficiencies or Misconduct.

The steps and processes are available when it is deemed likely to be successful in helping an employee meet expectations and avoid Misconduct. When SMA determines in good faith that an employee's skills, performance, or conduct are inconsistent with success at SMA, SMA may make an immediate change. Employment is at-will and no step, tool, or process removes SMA's discretion to make lawful employment decisions in the best interest of the Academy.

Administration's Role. SMA Administrators and supervisors are responsible for enforcing SMA policies and standards, including monitoring employee performance.

Steps. Outlined below are the steps of the Discipline Policy and procedure. Sarasota Military Academy reserves the right to skip, combine or change steps depending upon the facts of each situation and the nature of the conduct. The level of disciplinary intervention may vary depending on the facts. Some of the factors that will be considered include whether or not the conduct is repeated despite coaching, counseling and/or training, the employee's work record and the impact of the conduct and performance issues have on our school.

Step 1: Counseling and a Verbal Warning

Step 2: Written Warning and/or Performance Improvement Plan

Step 3: Suspension and/or a Final Written Warning/ Performance Improvement Plan

Step 4: Termination of Employment

Unlawful Conduct

In the event an employee violates the law, discretion is removed from the supervisory level and accelerated to the Director of Schools for handling. Unlawful conduct may be reported to the appropriate authorities.

Documentation

Employees should be provided copies of Written Warnings, Performance Improvement Plans, and other disciplinary communications.

Employees should sign copies of this documentation acknowledging receipt and understanding of the corrective action outlined in the documentation. Employees are invited to provide written feedback, including an explanation of any disagreement with the documentation. Employees seeking to remain employed at SMA should not simply refuse to sign disciplinary documentation without providing a specific written objection or request.

If additional time is needed, please request a specific, reasonable amount of time, and return the document with your comments within the allotted time frame.

The employee's request and response should be documented.

The disciplinary action is in effect when delivered to the employee. Failure to return or sign the documentation does not delay or alter the effect of the documentation.

Copies of the disciplinary documents, including the employee's response, will be placed in the employee's personnel file and will remain in the file during the employee's employment with Sarasota Military Academy. Employees may obtain copies of any disciplinary document signed by the employee.

RESPONSIBILITY FOR WORK/ ASSIGNMENTS

The school Administration is responsible for assigning work. However, each employee is responsible for communicating regarding workload and capacity to take on additional work. Each staff member is accountable and responsible for:

- Understanding all aspects of the staff member's work assignments,
- Asking questions when something is unclear,
- Producing high quality work, and
- Ensuring that all time is used productively.

FEEDBACK AND EVALUATIONS

We urge each employee to discuss performance and expectations openly with supervisors, managers, and Administrators at any time and to request feedback throughout the year. Additionally, more formal annual performance evaluations will be conducted. Annual evaluations will be discussed in a private meeting. Dialogue is encouraged at this meeting. Employees are required to sign written evaluation as an indication of understanding of all of the expectations stated therein.

Employees should sign copies of this documentation acknowledging receipt and understanding of the feedback. Employees are invited to provide written feedback in response, including an explanation of any disagreement with the documentation. Employees seeking to remain employed at SMA should not simply refuse to sign evaluations without providing a specific written objection or request. If additional time is needed, please request a specific, reasonable amount of time, and return the document with your comments within the allotted time frame.

CHILD ABUSE REPORTING

Administration. If any employee suspects that a child has been abused or neglected should immediately communicate the details of the concern to the Heads of School and the CEO.

Legal Reporting Requirement. Any individual who suspects that a child has been abused by any person is required to make a report to the Florida Abuse Hotline.

Any allegations a child was abused or neglected by a caregiver will be investigated by the Department of Children and Families, while allegations of child abuse by someone other than a caregiver will be accepted at the Hotline and immediately electronically transferred to the appropriate local law enforcement agency where the child lives.

The Florida Abuse Hotline accepts reports 24 hours a day and 7 days a week of known or suspected child abuse, neglect, or abandonment and reports of known or suspected abuse, neglect, or exploitation of a vulnerable adult. To make a report you can -

- **report online at <https://reportabuse.dcf.state.fl.us/>**
- **call 1-800-962-2873**
- **Florida Relay 711 or TTY 800-955-8771**
- **fax your report to 800-914-0004**

If you suspect or know of a child or vulnerable adult in immediate danger, call 911.

Reporters. Pursuant to Florida Statutes, any person, including, but not limited to any SMA employee or volunteer who knows, or has reasonable cause to suspect, that a child is abused, abandoned, or neglected. Nothing in this policy should be interpreted to eliminate any individual's obligation to ensure that a report is made to the Florida Department of Children and Families in compliance with law.

Outside FL. The Central Abuse Hotline will accept any reports involving perpetrators who reside outside the state of Florida so long as the victim is residing in the county in Florida where the report is being made.

Confidentiality. Reports made to the Central Abuse Hotline are governed by statutory rules of confidentiality and exemption from public records.

Violation. A person who is required by Florida Statutes to report known or suspected child abuse or neglect and who knowingly and willfully fails to do so, or who knowingly and willfully prevents another person from doing so, is subject to criminal prosecution. Penalties for those who suspect a child is being abused but fail to report it have been increased from a misdemeanor to a felony. Financial penalties also have increased.

Failure to comply with this Policy constitutes Misconduct.

Professional Conduct Requirements in Education

All team members must comply with the applicable Principles of Professional Conduct for the Education Profession in Florida, as updated from time to time, and all applicable laws.

- Violation of any of these principles shall subject the individual to revocation or suspension of the individual educator's certificate, or the other penalties as provided by law and constitute Misconduct.

Obligation to the Cadet requires that the individual:

- Shall make reasonable effort to protect the Cadet from conditions harmful to learning and/or to the Cadet's mental and/or physical health and/or safety.
- Shall not unreasonably restrain a Cadet from independent action in pursuit of learning.
- Shall not unreasonably deny a Cadet access to diverse points of view.

- Shall not intentionally suppress or distort subject matter relevant to a Cadet's academic program.
- Shall not intentionally expose a Cadet to unnecessary embarrassment or disparagement.
- Shall not intentionally violate or deny a Cadet's legal rights.
- Shall not harass or discriminate against any Cadet on the basis of race, color, religion, sex, age, national or ethnic origin, political beliefs, marital status, handicapping condition, sexual orientation, or social and family background and shall make reasonable effort to assure that each Cadet is protected from harassment or discrimination.
- Shall not exploit a relationship with a Cadet for personal gain or advantage.
- Shall keep in confidence personally identifiable information obtained in the course of professional service, unless disclosure serves professional purposes or is required by law.

Obligation to the public requires that the individual:

- Shall take reasonable precautions to distinguish between personal views and those of any educational institution or Academy with which the individual is affiliated.
- Shall not intentionally distort or misrepresent facts concerning an educational matter in direct or indirect public expression.
- Shall not use institutional privileges for personal gain or advantage.
- Shall accept no gratuity, gift, or favor that might influence professional judgment.
- Shall offer no gratuity, gift, or favor to obtain special advantages.

Obligation to the profession of education requires that the individual:

- Shall maintain honesty in all professional dealings.
- Shall not on the basis of race, color, religion, sex, age, national or ethnic origin, political beliefs, marital status, handicapping condition if otherwise qualified, or social and family background deny to a colleague professional benefits or advantages or participation in any professional organization.
- Shall not interfere with a colleague's exercise of political or civil rights and responsibilities.
- Shall not engage in harassment or discriminatory conduct, which unreasonably interferes with an individual's performance of professional or work responsibilities or with the orderly processes of education, which fosters a hostile, intimidating, abusive, offensive, or oppressive environment; and further, shall make reasonable effort to assure that each individual is protected from such harassment or discrimination.
- Shall not make malicious or intentionally false statements about a colleague.
- Shall not use coercive means or promise special treatment to influence professional judgment of colleagues.
- Shall not misrepresent one's own professional qualifications.
- Shall not submit fraudulent information on any document in connection with professional activities.
- Shall not make any fraudulent statement or fail to disclose a material fact in one's own or another's application for a professional position.
- Shall not withhold information regarding a position from an applicant or misrepresent an assignment or conditions of employment.
- Shall provide upon the request of the certificated individual, a written statement of specific reason for recommendations that lead to the denial of increments, significant changes in employment, or termination of employment.

- Shall not assist entry into or continuance in the profession of any person known to be unqualified in accordance with these Principles of Professional Conduct of the Education Profession in Florida and other applicable Florida Statutes and State Board of Education Rules.
- Shall self-report within 48 hours to appropriate authorities (as determined by district) any arrests/charges involving the abuse of a child or the sale and/or possession of a controlled substance. Such notice shall not be considered an admission of guilt nor shall such notice be admissible for any purpose in any proceeding, civil or criminal, administrative or judicial, investigatory or adjudicatory. In addition, shall self-report any conviction, finding of guilt, withholding of adjudication, commitment to a pretrial diversion program, or entering of a plea of guilty or Nolo Contendere for any criminal offense other than a minor traffic violation within forty-eight hours after the final judgment. When handling sealed and expunged records disclosed under this rule, school districts shall comply with the confidentiality provisions of Sections 943.0585(4) (c), Florida Statutes.
- Shall report to appropriate authorities any known allegation of a violation of the Florida School Code or State Board of Education Rules as defined in Section 1012.795(1), Florida Statutes.
- Shall seek no reprisal against any individual who has reported any allegation of a violation of the Florida School Code or State Board of Education Rules as defined in Section 1012.795(1), Florida Statutes.
- Shall comply with the conditions of an order of the Education Practices Commission.
- Shall, as the supervising administrator, cooperate with the Education Practices Commission in monitoring the probation of a subordinate.

ANTI-DISCRIMINATION, ANTI-HARASSMENT, AND ANTI-RETALIATION POLICY

The Academy is committed to equal employment opportunity and providing a workplace free of employment discrimination, harassment, and retaliation. This policy prohibits unlawful conduct and conduct that is inconsistent with a culture of respect.

Discrimination

Employment discrimination is prohibited. As used in this policy, employment discrimination means discrimination in any employment-related activity or term or condition of employment because of a *protected characteristic or protected conduct*.

- As used in this policy, **employment-related activities** means:
 - Recruiting, advertising, and interviewing
 - Hiring and selection,
 - Education and training,
 - Advancement/promotion,
 - Compensation,
 - Benefits and benefit administration,
 - Enforcement of policies,
 - Discipline and termination, and
 - All other terms and conditions of employment.

- **Protected Characteristics.** As used in this policy, *protected characteristics* mean:
 - Race,
 - Color,
 - Religion,
 - Gender,
 - National origin,
 - Marital status,
 - Age,
 - Disability,
 - Genetic information,
 - Sexual orientation, or
 - Any other characteristic protected by federal, state, or local law or ordinance.

- **Protected Conduct.** As used in this policy, *protected conduct* means the good faith exercise of legal rights, including:
 - Taking legally protected leave, including military leave, jury duty, workers' compensation or other legally protected leave
 - Engaging in whistleblower conduct,
 - Seeking an accommodation provided bylaw,
 - Filing a workers' compensation claim relating to a work-related illness or injury.
 - Military service,
 - Filing bankruptcy,
 - Engaging in protected concerted activity, or
 - Any other conduct protected by federal, state or local law.

Harassment

Harassment relating to employment is prohibited.

Definition. As used in this policy, prohibited **harassment** means both unlawful harassment and all other unwelcome and negative employment-related treatment relating to a person's *protected characteristics or protected conduct*:

- Prohibited harassment is not restricted to one particular type of verbal or physical conduct, but could include any of the following forms of unwelcome conduct when the conduct is because of a *protected characteristic or protected conduct*:
 - Derogatory comments, slurs, epithets, jokes, labels, or physical conduct or communications that depict or negatively reference a protected characteristic or protected conduct;
 - Subtle or overt pressure for sexual favors, offering of benefits in exchange for sexual conduct, or threatening reprisals after a negative response to such advances;
 - Derogatory or vulgar statements regarding sexuality or gender or other protected characteristic;
 - Unwelcome or offensive touching; patting; pinching; whistling; leering, or physical assault;
 - Turning work discussions into sexual topics;

- Displaying sexually suggestive visual material, cartoons, pictures or other displays of objects depicting sex;

Sexual Harassment

Sexual harassment is a form of prohibited harassment.

- **Definition.** As used in this policy, prohibited sexual harassment means unwelcome conduct of a sexual nature (sexual advances, requests for sexual favors, or other verbal or physical conduct of a sexual nature) that:
 - Explicitly or implicitly affects an individual's terms and conditions of employment, or
 - Unreasonably interferes with an individual's work or creates an intimidating, hostile, or offensive work environment.
- **Examples.** Prohibited sexual harassment could be found in a variety of circumstances:
 - By individuals of either sex and between individuals of the same sex or of different sexes.
 - By a co-worker, supervisor, or other agent of the employer, or a non-employee with whom the employee interacts relating to work.
 - Whether or not economic injury to or discharge of the victim has occurred.

Bullying and Cyber Bullying

It is the Academy's policy that employees and Cadets have an educational setting that is safe, secure, and free from bullying of any kind. The Academy will not tolerate bullying. Conduct that constitutes bullying, as defined below, is strictly prohibited:

Bullying includes cyber bullying and means systematically and chronically inflicting physical hurt or psychological distress on one or more Cadets or employees.

It is further defined as unwanted and repeated written, verbal, or physical behavior, including any threatening, insulting, or dehumanizing gesture, by a Cadet or adult, that is severe or pervasive enough to foster an intimidating, hostile, or offensive educational environment; or to cause discomfort or humiliation and unreasonably interfere with the individual's school performance or participation.

Such behavior may involve but is not limited to: teasing, social exclusion, threat, intimidation, stalking, physical violence, theft, sexual, religious, or racial harassment, public or private humiliation, and destruction of property.

Cyber bullying means bullying through the use of technology or any electronic communication, which includes, but is not limited to, any transfer of signs, signals, writing, images, sounds, data or intelligence of any nature transmitted in whole or in part by a wire, radio, electromagnetic system, photo-electronic system, or photo-optical system, including, but not limited to, electronic mail, internet communications, instant messages, or facsimile communications. Cyber bullying includes making a webpage or weblog in which the designer assumes the identity of another person, or the knowing impersonation of another person as the author of posted content or messages, if the designer or impersonation fosters any of the conditions enumerated in the definition of bullying. Cyber bullying also includes the distribution by electronic means of a communication to more than one person or the posting of material on an electronic medium that

may be accessed by one or more persons, if the distribution or posting fosters any of the conditions enumerated in the definition of bullying.

Bullying includes any threatening, insulting, or dehumanizing gesture, use of data or computer software, or written, verbal or physical conduct directed against a Cadet or school employee that

- Places a Cadet or school employee in reasonable fear of harm to his or her person or damage to his or her property;
- Has the effect of substantially interfering with a Cadet's educational performance, opportunities, or benefits; or
- Has the effect of substantially disrupting the orderly operation of the school.

Perpetuation of conduct listed in the definition of bullying by an individual or group with intent to demean, dehumanize, embarrass, or cause emotional or physical harm to a Cadet or school employee by:

- Incitement or coercion;
- Accessing or knowingly and willingly causing or providing access to data or computer software through a computer, computer system, or computer network within the scope of the district school system, and
- Acting in a manner that has an effect substantially similar to the effect of bullying.

Cyber stalking as defined means to engage in a course of conduct to communicate, or to cause to be communicated, words, images, or language by or through the use of electronic mail or electronic communication, directed at a specific person, causing substantial emotional distress to that person and serving no legitimate purpose.

Prevention of Bullying

The Academy shall work to sustain a healthy, positive, and safe learning environment for all Cadets and employees. It is important for every employee to actively foster the appropriate social climate of the school and the social norms with regard to bullying. This requires the efforts of everyone in the school environment: teachers, administrators, support staff, school nurses, parents/legal guardians, and Cadets.

Retaliation Prohibition

Retaliation against any individual who objects to a violation of this policy, reports a good faith concern or complaint of a violation of this policy or who cooperates in an investigation relating to this policy is prohibited.

Retaliation is a violation of this policy and should be reported in the same manner as any other violation of this policy.

Scope

This policy prohibiting employment discrimination, harassment, retaliation, and bullying applies to all employment-related activities, whether inside or outside the school/workplace, including:

- Recruiting, advertising, and interviewing
- Hiring and selection,
- Education and training,
- Assignment of duties
- Advancement/promotion,
- Compensation,
- Benefits and benefit administration,
- Enforcement of policies,
- Discipline and termination,
- Post-employment references, and
- Other terms and conditions of employment.

When and How to Report Prohibited Conduct

Under no circumstance should anyone submit to or ignore violations of this policy. Each employee has the right, and is strongly encouraged; to immediately tell the offender the conduct is unwelcome and should stop.

Everyone who is aware of the conduct is under an obligation to report it to the Head of School or CEO.

- The purpose of having several persons to whom complaints may be made is to provide various avenues of complaint and allow individuals the opportunity to complain to someone other than the subject of the complaint.
- Reports should contain sufficient information to allow the Academy to investigate and address the issue.

Any person, including a Cadet, employee, volunteer, or parent/legal guardian, may file a report in person, by phone, or by email. Reports may be signed or anonymous, written or verbal. However, if a report is anonymous, it is more difficult to investigate without sufficient details.

Response to Reports/Violations

The Academy is committed to taking all reasonable steps to prevent employment discrimination, harassment, retaliation, and bullying from occurring and will promptly investigate reports.

- Reports will be handled with sensitivity and discretion and the confidentiality allowed by the circumstances and the law. This usually means that during the investigation the information about the report is communicated only to the extent appropriate to conduct an effective investigation and resolution.
- Depending on the allegations and issues, the Academy may need to interview people known to have or likely to have relevant information. Cooperation with investigators to allow for an effective investigation and resolution is required of all employees.
- If there is a reasonable need for a temporary transfer, investigatory leave, or change in work schedule, the employee seeking such relief should communicate the request to the individual addressing the initial report.
- Upon completion of the investigation, the Academy will communicate with the reporting employee to the extent appropriate under the circumstances.
- Violation of this policy constitutes Misconduct.

- Although the Academy's ability to discipline a non-employee is limited by the degree of control, if any, the Academy has over the non-employee, if a violation of this policy is found, the Academy will take appropriate action to prevent any further violation.
- Falsely accusing another of a violation of this policy or knowingly or in a malicious manner or making any misrepresentation during an investigation constitutes Misconduct.

Request for Review/Appeal

If anyone directly involved in a report or investigation pursuant to this policy is dissatisfied with the handling, outcome or resolution, that individual has the right to appeal the decision by submitting a detailed written request in a timely manner to the CEO. If an employee is unsatisfied with the resolution, a written request should be submitted to the Board Audit Committee. Information on who is the Board Audit Chair can be found on the SMA website under "Board of Directors" or a document may be delivered to the SMA office marked "Board of Directors Audit Chair."

Maintaining a Culture of Respect

The Academy seeks to have all members of our team working together to maintain a culture of respect in all interactions. When an individual's lawful conduct related to the Academy is determined to be inconsistent with the Academy's culture of respect or standards, the Academy maintains complete discretion to address such conduct as determined appropriate under the circumstances. This includes requiring higher expectations than required by law. Harassment, discrimination, bullying, or other inappropriate conduct toward co-workers will not be tolerated.

WORKPLACE VIOLENCE PREVENTION

The Academy is committed to preventing workplace violence and to maintaining a safe work environment. The following requirements are intended to prevent intimidation, harassment or other threats of (or actual) violence relating to work.

NO THREATS OR VIOLENT BEHAVIOR

Threats, verbal belligerence, and physically aggressive or violent behavior, whether directed at a person or property are strictly prohibited.

Reporting Requirement

Any threat of (or actual) violence, both direct and indirect, should be reported as soon as possible to the Head of School.

The Academy encourages employees to bring their disputes or differences with other employees to the attention of the CEO before the situation escalates into potential violence.

No Retaliation

All reports will be taken seriously. Retaliation against anyone making a good faith report or cooperating in an investigation under this policy is prohibited and constitutes Misconduct.

No Weapons

No employee of any school shall have a weapon in his or her possession while on school property or at a school activity. Guns, whether operable or inoperable, loaded or unloaded, facsimile weapons or antique weapons may not be brought on to school property including the parking lot or to a school activity. Any weapon confiscated shall be immediately turned over to the Head of School or designee who shall turn the weapon over to the proper authorities. Authorized law enforcement officers may have weapons in their possession while on duty.

Notwithstanding, this policy does not prohibit (i) armed law enforcement officers, including school resource officers (SROs), from following department policy in compliance with law, (ii) an employee's exercise of rights that may not lawfully be limited by an employer, such as maintaining a locked weapon in a vehicle trunk, (3) written exceptions expressly authorized and signed by the Head of School or CEO and which are determined to not endanger any person, such as educational instruction using an air rifle relating to military or JROTC weaponry.

THEFT

Theft from the Academy, a Cadet, employee, or other person related to the Academy or unauthorized possession or removal of Academy property without prior permission, unauthorized use of equipment or property for personal reasons or using association equipment for profit, or submitting a false time report is prohibited.

GAMBLING

The Academy seeks to comply with all federal, state and local laws. Gambling while at work is prohibited.

FITNESS FOR DUTY AND DRUG FREE WORKPLACE

- **Self-Assessment.** Each employee is responsible for ensuring the employee's own fitness for duty at all times the employee is scheduled to work or actually working. Being fit for duty means being capable of safely, thoughtfully and effectively performing the job without the influence of illegal drugs, legal medication that prevents that fitness, or alcohol.
- **Reporting Lack of Fitness for Duty.** It is each employee's responsibility to immediately report any lack of fitness for duty to the CEO and to perform no work while unfit. Required documentation will need to be submitted to substantiate the lack of fitness for duty.

- **Alcohol and Drug Free Workplace Controlled Substances Act.** Our campuses are a drug-free workplace. No employee shall possess, consume, sell, distribute, dispense, use or be under the influence of any alcohol or controlled substance at any time, including while driving an Academy vehicle.

As a condition of employment, each employee will abide by the terms of this policy and must take a drug and alcohol test prior to employment. The test must result in a negative result. To the extent permitted by law, SMA may also require the submission to additional permissible testing under the circumstances, including post-injury testing, reasonable suspicion testing, and if appropriate, random testing.

Notice Requirement. Within 48 hours of a criminal drug statute arrest or conviction, an employee must notify the CEO.

An employee showing signs of impairment of cognitive functions suggestive of alcohol or drugs will be required to undergo drug and or alcohol testing. Refusal to submit to lawfully requested alcohol/drug testing constitutes Misconduct.

- **Controlled Substances.** Possessing, using, consuming, purchasing, distributing, manufacturing, dispensing or selling controlled substances or having controlled substances in your system without a lawful medical authorization, or being unfit due to a lawfully prescribed medication, during work hours, on the Academy premises, or while working from any location is prohibited.
- **Legal Medication.** Working or being at work while under the influence of a legally prescribed medication that results in your unfitness for work duty is prohibited. Intentional misuse of prescribed medications is also prohibited.
- **Medical Marijuana.** Any state law decriminalizing marijuana for those with a prescription has no impact on this policy prohibiting the possession or use of marijuana at work, being under the influence of marijuana at work or having any detectable level of marijuana in your system. Federal law does not require employers to permit the medical use of marijuana.

Reasonable Suspicion/Post Accident Testing

The Academy has established testing procedures to enforce the fitness for duty requirements.

When reasonable suspicion has been established that an employee is under the influence of alcohol or illegal substance(s) at work, the Head of School or CEO will arrange for transportation to a testing facility. Employment may be temporarily suspended pending the receipt and review of test results, which, in the event of violation, may result in termination of employment.

Other than any legal notices or forms that may be provided in conjunction with testing, no advance notice other than this policy is required for testing.

The laboratory that conducts these tests may require blood, saliva and/or urine samples for reasonable suspicion/post-accident testing. Refusal to submit to drug testing, providing a false or adulterated sample, failing to provide a requested sample suitable for testing or submitting to a test resulting in a positive screen, which may result in termination of employment.

Violation. Violation of this Policy constitutes Misconduct.

Questions. Any questions regarding this policy may be directed to the Head of School or CEO.

SMOKE FREE WORKFORCE

The Academy prohibits the use of any form of tobacco. The use of e-Cigarettes is also prohibited. This policy applies to the campus property as well as any Academy vehicles.

EMERGENCY SCHOOL CLOSING

In case of an emergency, the CEO is authorized to close any school or both schools and to dismiss a school(s) prior to the regular daily dismissal hour. In the absence of the CEO, the Head of School may dismiss the school when an extreme emergency exists which could endanger the health, safety, or welfare of Cadets, faculty, and staff.

- In a declared state of emergency, school personnel shall maintain control of Cadets until the Cadets are released from school or in the case of transported Cadets, until they depart from the school bus.
- The CEO and Heads of School shall cooperate with emergency preparedness authorities during a natural or man-made disaster. If a civil disturbance or similar situation occurs, the Heads of School shall cooperate with the law enforcement authorities.

VEHICLES/DRIVING

Anyone operating a vehicle within the scope of employment with the Academy (“Work- Related Driving”) must comply with the Work Related Driving Rules attached to this handbook.-

VISITORS IN THE WORKPLACE

Administrative permission is required for all campus visitors. Visitors are required to sign in and obtain a visitor’s badge in the main office. A valid driver’s license or approved government identification is required to sign in on campus.

COMPUTERS, NETWORKS, AND INFORMATION SYSTEMS

Computer technologies have undergone a significant shift, particularly in the ways that information may be accessed, communicated, and transferred. These technological shifts can offer the opportunity to successfully enhance and promote educational instruction and Cadet learning. It is our intent to determine if these significant developments can translate into an innovative and more effective learning environment for our Cadets. The purpose of this policy is to define guidelines for Cadet, staff and visitors for the use of the computers, email, calendar, and access to Internet resources. These services provide:

- Access to district and global electronic mail with the ability to communicate within the district and globally;

- Access to various computerized information resources through the Academy's network consisting of software, hardware, online services, and the internet;
- Access to district and the Academy's resources from home or from an off-site premise in support of education and/or research consistent with academic goals; and
- Discussion groups on a wide variety of topics.

The benefits for staff, cadets, and visitors to such information access are obvious, but there are potential problems. These concerns include using email privileges to maliciously harm the reputation of another person; accessing network resources to acquire material not considered to have educational value; and using network resources for destructive purposes.

Violation of any of these procedures constitutes Misconduct and may result in revocation of employment offers, removal of access to electronic information services, cadet discipline, or employee reprimand or termination.

Acceptable Uses

Acceptable use of computers and electronic information services supports learning and teaching in the Academy. Any use of computers and electronic information services, which does not support learning and teaching in the Academy, is an unacceptable use of school equipment. The following actions constitute acceptable use:

- Computer equipment and internet use shall be consistent with Academy policies;
- Use of the internet, computer equipment and technology devices to promote the Cadet learning environment or improve the Academy's ability to operate; and
- Sending and receiving files for curriculum purposes.

Unacceptable Uses

The following actions constitute unacceptable use of computers and electronic information services, but are not limited to:

- Using e-mail to maliciously harm or injure the reputation of others;
- Using network access to alter or destroy information belonging to others;
- Using profanity, obscenity, or objectionable language which may be offensive to another user; or using impolite, abusive, or objectionable language in email messages;
- Copying or forwarding personal communications to others with malicious intent;
- Copying another's work without the original author's permission; using other copyright protected material in violation of law; or copying software or downloading copyright material without written permission from the owner;
- Using the network for any illegal activity (such as chain letters), non-school related activities or for commercial purposes;
- Using the network for any private purpose, including the sending of private e-mail or the viewing of adult-oriented websites;
- Spreading computer viruses deliberately or by importing files from unknown sources;
- Malicious attempts to harm or destroy data of another user;
- Storing personal images/photographs, or files dangerous to the integrity of network resources;

- Using any computer or program in a manner other than that which was intended;

Please note that any employee who has a network account is responsible at all times for its proper use. If you have any questions about the guidelines or procedures, please contact the Director of Human Resources.

DISCLOSURE, ETHICS AND CONFLICTS

Because the Academy requires strict adherence to ethical standards and the law, all employees must understand and comply with this policy and sign a separate conflicts disclosure form.

Duty to Report and Prohibition against Interference

All employees must immediately report all Conflicts of Interest, Disclosure Events, violations of laws, rules, regulations and ethical norms, and violations of this policy to the Head of School or CEO. Any effort to prohibit, discourage, or retaliate against anyone for complying with this duty to report or from cooperating in a review of a report is strictly prohibited and constitutes Misconduct. Reports of interference or retaliation must be directed to the Head of School, CEO or a member of the Board's Audit Committee.

Conflicts Of Interest and Disclosures

- **Definition of Conflict of Interest.** A reportable "Disclosure Event" or "Conflict of Interest" occurs when an individual's private interests may reasonably be viewed as inconsistent with, in tension with, or likely to interfere with the Academy's interests. The Academy requires various public employee disclosures and statements.
- **Reporting of Disclosure Events and Conflicts of Interest.** Any individual who becomes aware of an actual Conflict of Interest or a Disclosure Event must immediately report all relevant facts to the CEO.
- **Prohibition on Conflicts of Interest.** Disclosure Events that are determined by the Academy to constitute Conflicts of Interest shall be prohibited or limited by the Academy. Disclosure Events that are determined to not give rise to a Conflict of Interest may be permitted or waived following review. All actual conflicts of interest are strictly prohibited unless the CEO has approved them after reviewing all relevant facts.
- **Gifts and Solicitation.** Employees, shall not accept, directly or indirectly, gifts or gratuities valued at more than \$25 from vendors or potential vendors which might influence or appear to influence purchasing decisions. Employees should report offers from vendors and potential vendors to the CEO.
- **Political Activities Florida Statute 104.31**
 - No employee shall use his or her position to interfere with an election or coerce anyone's vote or coerce anyone to contribute, lend money to, or participate in political causes.
 - Political posters shall not be displayed in schools.
 - Political literature shall not be distributed in schools or on school property.
 - Solicitations for votes or contributions shall not be conducted in schools or on school

property.

- Students shall not be required or requested to distribute campaign literature.
- Employees shall refrain from participation in politics while on duty or while on school property during the hours school is in session.
- **Prohibition on Retaliation.** Any efforts to prohibit, discourage, or retaliate against anyone for reporting or cooperating in a review of an actual or potential conflict of interest is strictly prohibited and constitutes Misconduct. Reports of such interference or retaliation shall be directed to the Head of School.

Examples of Conflicts of Interest and Disclosure Events

- **Using Position or Relationships.** Using or allowing one's relationship with the Academy, including relationships with the Academy's Cadets, business associates or affiliates, to advance the financial interest of an employee, family member, relative, domestic partner, friend, or any other person or entity. (Acting in good faith to advance the Academy's interests or to fulfill one's duties for the benefit of the Academy would not constitute a Disclosure or actual Conflict of Interest.) See the Academy's Relationships Outside of Work/Nepotism Policy.
- **Diverting Academy Opportunities.** Failing to advance the Academy's interests when the opportunity arises in an effort to save the opportunity for another or to divert the opportunity to another.
- **Using Property or Information.** Using Academy property or information in any manner other than in the furtherance of the Academy's legal and ethical goals.
- **Soliciting Academy Business Associates.** Using confidential information or relationships gained through your work at the Academy to directly or indirectly solicit any Academy Business associates for any business other than that of the Academy.
- **Accepting Gifts/Anything of Value.** Accepting personal gifts, money, or entertainment (other than standard business meals or entertainment invitations) from a Cadet, contractor, supplier, or other person or entity doing business with or seeking to do business with the Academy valued at greater than \$25 in the aggregate.
- **Relationships.** Personal relationships of any sort with any Cadet are never allowed and all employees should ensure that their actions and behaviors with Cadets do not imply otherwise.
 - Employees of the Academy must avoid personal relationships with other employees of the Academy that might interfere with the exercise of impartial judgment in educational or employment-related decisions affecting the Academy or its business
- **Harassment, Discrimination, Retaliation, Bullying.** Engaging in conduct that violates employee rights, including prohibited harassment, discrimination, retaliation, bullying, or using another employee's time for personal benefit or engaging in any personal romantic relationship with an employee.
- **Using Information.** Using proprietary or confidential Academy information for any reason other than the ethical and authorized furtherance of your duties on behalf of the Academy

or as other required by law.

- **Financial Interest.** Having a direct or indirect financial interest in a contractor, supplier, or individual or entity otherwise doing business with or seeking to do business with the Academy. Except, however, owning less than a 5% interest in a publicly traded entity shall not be a reportable Conflict of Interest.
- **Property Interest.** Acquiring any interest in property or assets of any kind for the purpose of selling, renting or leasing it to the Academy or a Cadet.
- **Support to Others.** Committing the Academy to give its financial or other support to any outside activity or association without authority.
- **Kickback or Gift.** Receiving a personal benefit (other than the employee's regular wages) from a transaction or Academy relationship over which the employee has any influence or involvement.
- **Benefit to Third Party.** A relative or a close personal friend of an employee receiving a personal benefit from a transaction or relationship involving the Academy or a Cadet when the employee has exercised input, influence or involvement with the transaction, product, or relationship.

COMPLIANCE WITH LAW, RULES, REGULATIONS, AND ETHICAL NORMS

The Academy requires strict compliance with all laws, rules, and regulations. The Academy also requires its employees and agents to act in an ethical manner. No violations are permitted.

Any concerns regarding potential violations must be reported to the Head of School, CEO or a member of the Board of directors' Audit Committee immediately. Any efforts to prohibit, discourage, or retaliate against anyone for complying with a law, rule, regulation or ethics standard or cooperating with a review of an actual or potential violation is strictly prohibited. Reports of interference or retaliation must also be directed to the CEO or a member of the Board of Directors' Audit Committee.

- **Communications, Recording and Reporting of Information.** All communications, recordings and reporting of information relating to the Academy must be accurate.
- **Unfair Practices.** Unfair or deceptive practices are strictly prohibited. Such practices include, but are not limited to, misusing proprietary information, misrepresenting facts or misleading anyone.

COMPLIANCE WITH PUBLIC RECORDS LAW AND EXEMPTIONS

Every employee of the Academy must comply with the Florida Public Records Law and maintain a copy of all documents considered under the law to be public records. The District maintains copies of the Academy's email accounts. Any requests relating to the Public Records Act should be submitted to the CEO for review of exemptions, coordination with the District, and response.

Exemptions/Confidential Information. It is very important to be aware of confidential records that are exempt from disclosure and to protect confidential information from disclosure. Most student records, for example, are confidential and exempt from disclosure.

INFORMATION SECURITY - "SENSITIVE INFORMATION"

The Academy collects and processes data for a variety of educational and employment related purposes. On occasion, the information may include personal data that can be used directly or indirectly to identify an individual and may include sensitive information. The Academy is committed to complying with the applicable privacy and data protection laws.

SOCIAL MEDIA – ACCEPTABLE USE

Not on Academy Time or Device. Participating in social media while on worktime, or on an Academy-provided device, unless it is work-related, is prohibited.

Prohibitions. Employees may not post confidential and legally protected information relating to the Academy, employees, cadets or any other person affiliated with the Academy. For example, no postings involving cadets or student records shall be made without express approval due to the legal confidentiality of student records.

Reputational. Employees may not post obscenities, slurs or personal attacks that would otherwise violate an Academy policy, including the policy prohibiting discrimination, harassment, retaliation, and bullying. When posting on social media sites, employees must use the disclaimer when discussing Academy-related matters, "The opinions stated on this site are my own and do not necessarily reflect that of Sarasota Military Academy.

Monitoring. Sarasota Military Academy monitors Internet use at work and may review publicly available information.

Questions. If you have any questions regarding confidential and legally protected information, or regarding this policy, please contact the CEO.

Violations. Policy violations constitute Misconduct.

PROTECTION OF ACADEMY PROPERTY AND ASSETS

Individuals with access to the Academy's property, including property of Cadets, shall limit such use to authorized, safe, legal, ethical, reasonable, and Academy-related purposes. Any requests for waivers of this policy must be directed to the Head of School or CEO.

RETALIATION /WHISTLEBLOWER POLICY

It is the policy of the Academy to foster an environment of openness and fair dealing, to be good stewards of public funds, and to comply with all applicable laws. To that end, the Academy and

its board of directors strictly prohibit retaliation against anyone engaging in protected whistleblower conduct as described by Florida law.

The Academy expressly prohibits the taking of retaliatory action against anyone who reports to the Academy violations of law that create a substantial and specific danger to the public's health, safety, or welfare.

The Academy further prohibits retaliatory action against any person who discloses information to the Academy alleging improper use of governmental office, gross waste of funds, or any other abuse or gross neglect of duty on the part of the Academy, a public officer, or an employee.

Prohibited retaliation includes taking adverse personnel action including discharge, suspension, transfer, or demotion of any employee or the withholding of bonuses, the reduction in compensation or benefits, or any other adverse action taken against an employee within the terms and conditions of employment.

- **Reporting Obligation.** In the event any staff member, parent or Cadet perceives any violation of law or other wrongful act relating to the Academy (whether or not such conduct constitutes whistleblower conduct under Florida law) the staff member, parent or Cadet should immediately report the issue to the Head of School or CEO or to a member of the Board of Directors' Audit Committee.
- **Cooperation in Investigation.** Upon the Board or Administration's request, all staff members, Cadets and administrators are required to participate in the Academy's investigation of wrongful conduct.
- **Protected Activity.** Good faith reports and statements made to investigators constitute protected activity under this policy regardless of whether they constitute protected activity under Florida law.
- **Not Protected Activity.** A bad faith report or any misrepresentation to an investigator of a potential Whistleblower policy violation does not constitute protected activity and constitutes Misconduct.
- **Violations.** Violation of this policy may constitute misconduct and result in further disciplinary action up to and including termination of employment.

Section 5:

SCHEDULES AND ATTENDANCE

ATTENDANCE & PUNCTUALITY

Essential Job Duty

Because every employee has an important role in the Academy's Mission, working when needed is an essential duty of each position. Each position has a typical schedule within regular office or school hours, but must be flexible to meet Academy needs. Each staff member is responsible for knowing his or her schedule and being aware of changes made to address Academy needs.

Schedules

Faculty Schedules and Attendance

Each faculty member's schedule and duty day includes required attendance and participation in the following (unless excused in advance by email request and response from the Head of School or designee):

- Daily Formation
- Entire School Day (on Campus)
- The standard high school hours are from **0700 to 1430**
- SMA Prep hours are from **0900 to 1630**
- Academy Special Events and Activities for the Staff Member's School
- Monthly Faculty Meetings

Hourly and Non-Faculty Employees' Work Schedules

Non-faculty employees, who are hired for alternative work schedules, and hourly employees must check with their supervisor, manager, Head of School or Administration to determine your specific schedule.

Reporting Absences

Employees who need to be absent from work unexpectedly, should give notice as far in advance as possible to allow for adequate coverage or to arrange a substitute if needed. Employees who will be away from their normal place of work during normal duty hours are required to report their absences and submit a written request within 3 business days of returning to work to the Attendance Clerk. Except in cases of emergency or illness, absences should be arranged in advance and requested/approved on the appropriate forms. To the extent possible, faculty is responsible for

providing lessons plans, attendance forms, and seating charts during their absence. If lessons plans are not available, emergency plans are to be utilized.

Planned Absences/Changes

The Academy provides various forms of time off. Unplanned absences are particularly disruptive and have a negative impact. Consequently, any staff member requesting more than the accrued number of sick days must request approval of any such request and include documentation from a licensed medical provider certifying the medical need and the associated time away from work. Taking unapproved leave without required medical documentation and approval may constitute Misconduct.

Return to Work Note. If an employee is away from work for more than 5 business days for medical reasons, the employee must provide a doctor's note indicating the medical need for the absence and the medical clearance (and any remaining restrictions) to the CEO prior to returning to work.

The CEO may waive this requirement.

Last Minute Absences/Tardiness

The Academy requires all employees to be present and ready to perform their duties at the start of their duty day and to remain present for their entire duty day, unless they have the prior written approval of their supervisor. Other than in rare, extenuating circumstances, failure to contact the Department chair or Head of School prior to being tardy may constitute misconduct and result in further disciplinary action, up to and including termination of employment.

Return to Work

It is important to keep the Attendance Clerk informed as to when you will return to work. Please ask whether a medical care provider note will be required to return to work. Employees on an approved leave of absence should contact the CEO regarding return to work.

Section 6: DRESS CODE

Uniform Use. Academy/Prep uniforms are to be worn while on duty or representing SMA at any event or function.

Uniform Standards. Uniforms are to be worn in strict compliance with this policy. When off duty, employees may change out of their uniforms. Employees choosing to remain in their uniforms while off duty must continue to strictly comply with all uniform requirements.

Part-Time Employees and Substitutes. The Academy/Prep **polo uniform**–Monday through Friday.

Full-Time Employees. The Academy dress uniform (**Class B**)-Monday through Thursday; however, Friday is an optional polo day **or professional attire day**.

Dress Uniform is also called the **Class B Uniform**

- White Dress Shirt may be purchased at Children’s World or at another location but must be approved, as long as the shirt looks similar in style and cut, and has epaulets on the shoulders.
- Long, black professional pants. No cargos, capris, or tight fitted pants.
- The nameplate, crest, black belt with buckle, star (**High School only**), and epaulets must **be attained at the Academy school store**.
- Black socks and black, closed toe shoes must be worn. Heels are not to exceed 2 inches.

Males

- Nameplate is centered on the right pocket flap.
- Gold star is centered ¼” above the right-pocket flap.
- The Academy crest is centered 1/8” above the gold star.
- Belt tip is worn to the left side of the buckle.
- Rank is to be worn on the shoulder epaulets.

Females

- Nameplate is centered on the right side of the uniform so that the bottom of the nameplate is even with the top of the first visible button. Some blouses are missing the first button; in which case, place your nameplate 1-2” above the first button.
 - Gold Star is centered ¼” above the nameplate.
 - SMA Crest: is centered 1/8” above the gold star.
 - Belt is worn with the tip of the belt to the right side of the buckle.
 - Rank is worn on the shoulder epaulets.

Polo Uniform

- The blue and gold Academy polo shirt and the black belt **are available exclusively at Children’s World**.
- Only Black or khaki dress pants or uniform shorts may be worn. No zippers, cargo, capris, jeans, or tight fitted pants are authorized.
- Shorts/pants must rest at the natural waist no more than 2” below the navel.

- Shorts must not extend below the knee and must be hemmed no more than 4" above the knee.
- Shorts/pants must have at least 1" of free play (without pulling) in the garment at the hips and legs.
- The bottom button of the polo shirt must be buttoned.
- Only plain white undergarments may be worn under the polo shirt. The wearing of an undershirt or camisole is optional.
- No long sleeve shirts may be worn under the polo shirt.
- Only athletic shoes or boat shoes are to be worn. All colors are allowed.
- Black socks must be worn and must be visible.
- The Academy zippered hoodie is the only approved hoodie. The hood must be worn down. The Academy hoodie is not to be worn with the Class B uniform.

Physical Activity Uniform

- PE instructors must wear black socks, athletic shoes, and black athletic shorts or pants with an authorized athletic shirt.
- JROTC instructors must wear black socks, athletic shoes, and Army PFUs.

The Academy Sweater, Jacket, and Hoodie

- Only the black Academy sweater and jacket are authorized to be worn with the Academy uniforms other than the polo uniform.
- The Academy hoodie may be worn over the polo uniform.

Combining with Civilian Attire Outside of School.

- Academy hoodies may be worn with the polo uniform and with civilian attire.
- Academy sweaters, jackets, and other uniform attire may not be worn over civilian attire.
- NO civilian attire may be worn with the Academy uniforms.

All DRESS CODE REQUIREMENTS APPLY INCLUDING: TATOOS, JEWELRY, COSMETICS AND NAIL POLISH REQUIREMENTS WHILE WEARING THE REQUIRED SMA CLASS B UNIFORM OR SMA POLO UNIFORM ON OR OFF CAMPUS.

Any employee who has questions about Dress Code requirements please contact the Head of School or CEO for clarification.

Tattoos (regardless of gender):

- Tattoos or brands, regardless of subject matter, are prohibited on the head, face, neck (anything above the t-shirt neckline to include on or inside the eyelids, mouth, and ears), below the wrist bone, and hands.
- In addition, regardless of the location, tattoos that are considered in violation of SMA's policies, such as involving sexist, racist, or otherwise indecent or offensive material are prohibited if revealed to anyone.
- Note that it is insufficient to temporarily cover prohibited tattoos or brands with bandages or make up.
- Any potentially disqualifying tattoos or brands should be discussed with Human Resources.

Piercing Standards for ALL Uniforms:

- **Females.** Females may wear post-type earrings in gold, silver, white pearl, or diamond. The earrings will not exceed 6mm or ¼" in diameter. Earrings must be unadorned and

spherical (round). The earrings may only be worn in the lowest piercing in the ear lobe. No other earrings are authorized.

- **Males.** Males may not wear earrings while in uniform. Any piercing other than ears may not be visible, tongue piercing and ear gauges are strictly prohibited.

Necklaces/Bracelets/Rings/Watches

- Both males and females may wear necklaces IF they are NOT visible in the uniform.
- No bracelets are allowed while in uniform.
- Both males and females may wear one ring per hand (engagement ring and wedding band count as one ring) and a wristwatch.
- These pieces must be conservative and not detract from the appearance of the uniform (no large or colorful rings and watches). Only black, gold, or silver watches are appropriate. They should not be oversized or ornate.

Cosmetic and Nail Polish Standards for all Uniforms:

Males: Clear nail polish is allowed, fingernails may not extend past the tip of the finger, and makeup is prohibited.

Females: Females may wear cosmetics that are conservative and complement the uniform and are natural in tone. **Distracting (including eccentric, exaggerated, glittery, bright, or trendy)** cosmetic styles and colors are inappropriate with the uniform and are prohibited.

Nails are to be neatly trimmed and avoiding overly long or elaborately decorated. Employees will not wear shades of lipstick and nail polish that are extreme and present an unprofessional appearance. Employees cannot apply designs to nails or apply two-tone or multi-colors to nails, however, they do have the option to wear an American manicure, a two-tone nail style that maintains a natural appearance.

Haircut and Shaving Standards for ALL Uniforms: Males

Employees must keep their hair trimmed to present a neat appearance, and the bulk cannot be excessive. Further, the hair must not touch the ears or the collar of the dress shirt. In any case, the length cannot exceed 2" (or less if hair is thick). Inappropriate styles that result in shaved portions of the scalp (other than the neckline) or designs cut into the hair are prohibited.

Facial Hair Policy for Teachers and Staff

As part of maintaining the professional standards all faculty and staff members are required to adhere to the following guidelines regarding facial hair:

1. **Well-Groomed Appearance:** Beards, mustaches, or other facial hair must be fully grown, neatly trimmed, and well-maintained prior to the start of the academic semester or the commencement of employment.
2. **No In-Process Growth:** Staff members are not permitted to grow out beards or mustaches during the school year. This ensures a consistent and professional appearance in alignment with our institutional values.

3. **Maintenance Standards:** All facial hair must be kept clean, trimmed, and present a tidy appearance at all times. Any facial hair that is deemed unkempt or inconsistent with professional standards will need to be addressed promptly.
4. **Sideburns:** If worn, sideburns will not extend below the bottom of the ear opening. Mustaches are permitted but must be neatly trimmed and tapered. No portion of the mustache will cover the upper lip line or extend sideways beyond the corners of the mouth. If employee uses dyes, tints or bleaches, use only dyes that result in natural hair colors and the new color must go from the scalp to the end of the hair (no highlighted tips). Prohibited colors include, but are not limited to, purple, blue, pink, green, orange, bright red, and fluorescent or neon colors. Any questions about hair color should be addressed to an administrator or JROTC instructor.
5. **Exceptions:** Accommodations for facial hair based on medical or religious reasons will be considered on a case-by-case basis and must be pre-approved through the appropriate administrative channels.

By maintaining these standards, we uphold the professionalism and decorum that reflect the Academy's commitment to excellence.

Hair Standards for all Uniforms: Females

Many female hairstyles are acceptable, as long as they are neat and conservative. Extreme, eccentric, or trendy haircuts or hairstyles are not authorized. If employee uses dyes, tints or bleaches, use only dyes that result in natural hair colors. Hair is to be neatly groomed and the length and bulk of the hair are not to be excessive. Hair will not present a ragged, unkempt, or extreme appearance. Females may wear braids as long as the braided style is conservative, the braids lie closely on the head, and any hair-holding devices comply with the standards below.

Hair will not fall over the eyebrows or extend below the bottom edge of the collar. Long hair that falls naturally below the bottom edge of the collar, to include braids, will be neatly and inconspicuously fastened or pinned, so no free-hanging hair is visible. Styles that are lopsided or distinctly unbalanced are prohibited. Ponytails, pigtails, or braids that are not secured to the head or are widely spaced with individual hanging locks and other extreme styles that protrude from the head are prohibited.

Hair-holding devices are authorized only for the purpose of securing the hair. Employees will not place hair-holding devices in the hair for decorative purposes. All hair-holding devices must be plain and of a color as close to the employee's hair as is possible or clear (e.g., a blonde may wear brown or clear hair-holding devices). Authorized devices include, but are not limited to, barrettes, combs, pins, clips, or elastic bands. Devices that are conspicuous, excessive, or decorative are prohibited. Some examples of prohibited devices include, but are not limited to, "scrunches," beads, bows, headbands, and barrettes with butterflies, flowers, sparkles, gems, or scalloped edges or in colors not closely matching the hair.

The following are standards adopted for the 2024-2025 school year:

- Hair must be neatly and inconspicuously fastened or secured to either a bun, single ponytail, two braids, or a single braid.
- Multiple locks, braids, twists or cornrows may come together in one or two braids or a single ponytail.
- Braids and single ponytails may be worn down the center of the back in all uniforms, but length will not extend past the bottom of the shoulder blades while at the position of attention.
- If worn, bangs may not fall below the eyebrows, may not interfere with the wear of all headgear, must lie neatly against the head, and not be visible underneath the front of the headgear. The width of the bangs may extend to the hairline at the temple.
- There is no minimum length for the wear of a ponytail or braid.
- Faddish and exaggerated styles, to include shaved portions of the scalp other than the neckline, designs cut in the hair, and unbalanced or lopsided hairstyles are prohibited.
- Hair will be styled so that it does not interfere with the proper wear of all military headgear. All headgear will fit snugly and comfortably around the largest part of the head without bulging or distortion from the intended shape of the headgear and without excessive gaps. When headgear is worn, hair should not protrude at distinct angles from under the edges. Hairstyles that do not allow the headgear to be worn in this manner are prohibited.
- Pigtails and widely spaced individual hanging locks, and other extreme styles that protrude from the head are prohibited.
- Dreadlocks are unauthorized.
- "Twists" are unauthorized (except French Twists.)
- Hair extensions are authorized, however, they must have the same general appearance as the natural hair and conform to the above regulations.

Exception to the Rule: Hair may be worn down **only** with the polo uniform and **only** on Fridays. Headbands and non-decorative pins may be worn as long as they match the hair color.

DRESS-DOWN DAY DRESS CODE

All clothing must be tasteful and appropriate

- No inappropriate writing or signs on clothing
- No drug, alcohol, profanity, nudity, or anything controversial
- Clothing may not be ripped, torn, or have holes
- Pants, shorts, and skirts must sit at the waist
- No flip-flops or slippers. Sandals and open-toe shoes are allowed
- No pajamas
- No hats
- No spaghetti straps, muscle shirts, or tank tops
- Shoulders and back must be covered
- No mid-drifts or cleavage showing
- Skirts and shorts cannot be higher than 4" above the knee
- No baggy pants
- Leggings must be worn with a dress or shorts at an appropriate length
- No skin-tight clothing
- If wearing the authorized Academy hoodie, do not use the hood to cover the head.

Failure to comply with Dress Code standards may result in disciplinary action up to and including termination of employment.

Section 7:

COMPENSATION AND RECORDING TIME

COMPENSATION AMOUNT

Employees will be paid a compensation amount commensurate with the policy and scale recommended by the CEO and adopted by the Academy's Board of Directors, which is in the form of a compensation scale based primarily upon the District compensation guideline, where applicable. Any compensation questions may be addressed to the CEO.

Salaried employees pay is computed and paid on a 24 pay period cycle, which goes from August 15th through July 31st each year and follows the Sarasota County School Board District Calendar.

Advanced Degree Supplement. SMA values advanced education and awards all Department of Education certified individuals who attain Qualifying Degrees in their areas of certification with the following pro-rated salary supplement:

- Amount:
 - MA: \$,5000; and
 - PhD: \$5,000
- Qualifying Degree: MA and PhD (or similar degree with approval) in an area in which the staff member maintains an active DOE certification, and which is conferred on or before the start of the school year (August 1). Any otherwise qualifying degree conferred after August 1 would be considered in subsequent employment years.

Hourly (non-exempt) employees are paid for actual time worked.

DIRECT DEPOSIT

SMA employees are paid bi-monthly (2 times a month). All pay will be direct deposited on the 15th and the last business day of the month, unless those dates fall on a weekend or holiday in which case payroll will be deposited the business day prior to the weekend or holiday.

FORM OF COMPENSATION (Salary or Hourly)-

Compensation is paid on either a salary or hourly basis.

- **Salaried (Exempt).** Being salaried means that an employee regularly receives a set amount of compensation for each week in which the employee works. While the salary amount takes

into account the overall ability, skill, effort and commitment required to perform the duties, the salary amount does not vary each week in response to the quantity or quality of work performed. Salaried employees work the hours needed to ensure the duties are performed, which may regularly exceed 40 hours in a work week. The number of hours worked in an individual work week does not alter that week's salary or result in overtime compensation

- **Deductions.** Deductions from salary in any particular week may only be made in compliance with Fair Labor Standards Act (FLSA) rules.

- **Hourly.** Receiving pay on an hourly basis means that all time worked must be accurately recorded and submitted for payment at the specified rate. Hourly employees will always be paid overtime when they work more than 40 hours in a given work week.

FLSA TIME KEEPING AND COMPENSATION REQUIREMENTS FOR NON-EXEMPT EMPLOYEES ONLY

In compliance with wage and hour laws (including the Fair Labor Standards Act), the Academy maintains accurate records of all hours worked, pays at least minimum wage, and pays overtime for all hours worked in excess of 40 hours in a workweek.

Paid Hourly. Hourly (non-exempt) employees are paid for all hours worked.

- **Record All Hours Worked.** Each employee in a non-exempt (hourly) position is required to clock in and out on one of the SMA time clocks. There is a time clock at each school location.
- **Hours Worked.** The record of hours worked must capture all of the time actually spent performing services for the Academy.
 - Each employee must personally record all start and end times worked each day, before and after uninterrupted breaks of at least 30 minutes and any other absences during scheduled work, whether scheduled or a deviation from the schedule, and whether authorized or not. The Academy will determine whether unauthorized time constitutes hours worked based on FLSA regulations.
 - **Hourly employees will receive one 10 minute paid break for every 4 hours worked.**
 - **Hourly employees are expected to be away from the work area only 10 minutes (or 30 minutes for lunch break) and return promptly.**
- **Prohibitions.** The following actions are prohibited:
 - Performing duties without pay (working off the clock).
 - Volunteering any time for performing duties for which you are an employee.
 - Encouraging any Academy employee to violate this policy or the FLSA.
 - Failing to record hours worked for any reason (including to appear more efficient or to avoid discipline because the time was worked without the required permission).
 - Making up time during a different work week than scheduled ("Comp Time").
- **Non-Compensable Time.** Hours worked do not include unpaid time or "non-compensable time" such as the following:
 - Any uninterrupted break that is 30 minutes or longer.
 - Personal, non-work-related activities outside of work.
 - Purely voluntary participation in community or professional events unrelated to the

- Academy or outside of work hours.
- Travel to and from home to work unless the initial and final work locations require extensive travel during regular working hours or are expressly approved as paid time.
- Attending Academy social events outside of your duty day or regular schedule on a purely voluntary basis without performing duties similar to your position.
- When on an approved leave of absence such as FMLA

Questions. Any questions regarding recording hours worked and should be directed to the Academy Finance Office.

Addressing Errors.

- **In the event there is an error in your time records,** it is your obligation to immediately (within 24 hours of becoming aware of the error) provide notice of the error and an explanation to the Academy Finance Office that processes payroll.

Minimum Wage. The Academy compensates employees for all hours worked and pays rates that satisfy all minimum wage requirements in the State of Florida.

Overtime.

- **Overtime for Non-Exempt (Hourly) Positions.** The Academy pays overtime rates for non-exempt positions in compliance with the Fair Labor Standards Act (FLSA) as follows
 - **Over 40 Hours.** Overtime is paid for all hours worked in excess of forty (40) hours in a single workweek. There is no “comp time” or saving of overtime hours for another workweek. If a non-exempt employee works more than 40 hours in a single workweek, overtime will be paid for all hours worked over 40.
 - **Rate.** The overtime rate is one and one half times the employee's regular rate of pay.
 - **Prior Approval Required.** Due to the budget impact of overtime expenses, Academy employees in non-exempt positions are required to obtain approval from the employee's supervisor prior to working in excess of 40 hours in a workweek. **Working unauthorized overtime will be handled as a disciplinary issue.**
- **Reporting and Correcting Errors.** Any employee who perceives that a classification or compensation error may have occurred must immediately advise the CEO of the details. The CEO will review the concern and determine whether an error was made. If an error was made, an immediate correction will be made. If the matter has not been corrected to your satisfaction within 5 days of your initial report, immediately notify the Audit Committee Chair of the Board of Directors of the details in writing (or by email with evidence of delivery) for further review. Retaliation against anyone who reports an error is prohibited.

Access to Pay Records

The Academy provides complete access to your own pay records including hours worked. Any questions regarding access to such records should be directed to the Academy Finance Office.

Violations

Violation of this timekeeping and compensation requirements policy constitutes Misconduct and may be grounds for further disciplinary action, up to and including termination of employment.

DEDUCTIONS FROM COMPENSATION

The Academy may deduct from paychecks as follows:

Legally required deductions.

- Federal, state, and local income taxes, if any, and the employee's contribution to Social Security and Medicare. These deductions will be itemized on pay stubs or receipts.
- Any other mandatory deductions, such as court-ordered garnishments or attachments.
- All amounts the employee owes to the Academy to the extent permitted by law.
- Any other deductions authorized by the employee and approved by the Academy.

Any questions or concerns about deductions should be directed to the Academy Finance Office.

GARNISHMENTS AND SUPPORT ORDERS

The Academy will comply with all valid claims against the wages of employees. If a wage garnishment, child support order or other legally valid claim is received against wages, the Academy will be required to comply with the provisions of the garnishment notice or order, as soon as practical after it is received. The Academy reserves the right to charge the state-allowed fee to collect a garnishment. The Academy Finance Office is responsible for processing these garnishments. Any questions should be directed to that office.

CHANGES IN PERSONAL INFORMATION

Changes in personal information, which affect Compensation or Benefits, including any change in name, address, marital status, or number of exemptions, must be reported to the Academy Finance Office and the CEO immediately.

VIDEO SURVEILLANCE

The Academy has determined that the use of surveillance cameras is necessary to ensure the safety and protection of Cadets, employees, visitors, and Academy property. Surveillance cameras are located throughout both SMA campuses and on all Academy owned school buses. The use of surveillance cameras is expected to improve safety and security by deterring acts of theft, violence and other criminal activity, and increasing the likelihood that perpetrators of these acts will be identified. The Academy uses video surveillance camera with audio recording capability on all SMA owned school buses.

Section 8:

BENEFITS & LEAVE

BENEFITS

As of the date of publication of the handbook, employees of the Academy are entitled to benefits listed below pursuant to the individual plan requirements. The benefits are also outlined on the Benefits online system.

The summary plan descriptions in place contain summaries of each plan. The Benefits brokers have additional information.

Subject to legal restrictions and notice requirements, the Academy reserves the right to alter or discontinue plans as determined appropriate. However, at the time of drafting of this Handbook, the following were in effect. Please consult the Director of Finance for the in effect Summary Plan Descriptions at any given time, as this Handbook is not updated each time benefits change.

Employee Eligibility

Benefit eligible employees are provided an opportunity to participate in the Sarasota Military Academy sponsored benefits program after satisfying the new hire waiting period and annually during open enrollment. You are eligible for benefits the first of the month following date of hire if you are a full-time salaried or hourly employee regularly scheduled to work 30 or more hours per week. **Note: The New Hire waiting period is the first of the month following 30 days from the date of hire.**

The benefits package includes the following:

- Employee Medical Insurance
- Employee Dental Insurance Plan
- Employee Vision Care Plan
- Employee Life/Accidental Death and Dismemberment insurance of \$50,000.

****Optional family/dependent medical /dental/vision plans are available. The employee will be responsible for the payment of the premiums required for that type of coverage.**

- Voluntary employee paid Short Term Disability Plan
- Voluntary employee paid Long Term Disability Plan
- Voluntary employee paid supplemental Life Insurance
- Participation in the Florida Retirement System (FRS) is required and 3% is deducted each pay period from each paycheck. There is no option to increase or decrease this amount.
- Optional tax-deferred 403b retirement plan. There is no Academy contribution and all employee contributions are voluntary.

The Florida Retirement System (FRS) offers two retirements plans: the FRS Pension Plan and the FRS Investment Plan. Each employee is required to select one plan. For new participants in the plan there are deadlines to enroll.** If is the Employee's responsibility to determine which plan is the most appropriate. Any questions regarding the Florida Retirement System plans should be directed to the Florida Retirement System at 844-377-1888.

****If no plan is selected before the deadline, the employee will default to the investment plan. The deadline at the time of drafting this Handbook is the last business day of the 8th month following your month of hire. Be sure to check the current deadline.**

NOTE:

Insurance when separating during the school year. Typically, any in-effect employee benefits apply only when actively employed and meeting plan requirements. However, because group health plan payments are paid monthly, SMA requests its insurer to provide departing employees any applicable and paid insurance through the end of the final month of employment, regardless of the separation date.

Insurance when separating after the school year. Employees completing their employment with SMA through the completion of the school year, and whose payment schedules provide for pay through July 31, and who are not scheduled to return to SMA the following school year, would retain in effect insurance benefits through the end of July – unless a particular plan requirement provides otherwise.

*****FRS for Qualified Part-Time Employees.** Qualified part-time employees participate in the Florida Retirement System (FRS) through automatic deduction, which at the time of drafting this Handbook, is 3% per pay period. The FRS does not provide an option to increase or decrease this amount.

Questions. Any questions concerning SMA benefit plans should be directed to the Director of Human Resources or CEO.

PAID TIME OFF (PTO)

Flexibility. In order to support work-life balance and flexibility, SMA has adopted a paid time off (PTO) policy. Under this policy, sick time and personal time are combined into a single bank of time for employee paid time off (PTO). This PTO policy creates a pool of time that you may use at your discretion throughout the year. PTO must be scheduled in advance with your supervisor or manager (or Human Resources if there are concerns), and only in an emergency should you have to call off work. This PTO policy is very versatile and it gives you the responsibility and flexibility for managing your time off. Remember- under the PTO policy you earn a fixed pool of paid time off to use as needed and as you deem necessary. However, once the pool is used up, an employee cannot borrow PTO time that has not been accrued. Any additional approved time off would be taken without pay.

PTO Amount and Accrual.

Regular Full Time Employees. Annual PTO for regular full-time employees (not Long-term Substitutes) is as follows:

- **11 month employees** (220 days) receive 11 days of PTO per year, pro-rated as described below.
- **12 month employees** (240 days) receive 12 days PTO per year, pro-rated as described below.

(Employee must work one workday over ½ month to earn a day for that month.)

Timing of Accrual/Use of PTO for full-time employees

- **Upon Hire.** On the first day of employment full-time employees will receive 4 days of PTO which may be used immediately. The 4 days of PTO is included in the number of days above, (it is not in addition to the days above).
- **After 4 Months.** Beginning the 5th month, a full-time employee will earn 1 PTO day a month for each month worked.

PTO for 10-month employees and Army Instructors. All benefit-eligible 10-month (196 days) employees and all benefit-eligible Army Instructors (whether 11 or 12-month employees) receive 10 days of PTO per year, pro-rated.

Long-Term Substitutes. Long term substitute teachers will begin earning LT Sub pay and PTO days, after completing four consecutive, full-time, weeks of service (20 days). One day of PTO will be earned for each of the next four consecutive weeks of full-time service thereafter.

Regular Part-Time Employees and Temporary Employees (Other than Long-Term Substitutes): Regular Part-Time Employees and Temporary Employees other than Long-Term Substitutes do not earn or receive PTO, and do not receive holiday pay.

- 1. No Advances or Negative Balances.** Employees may not obtain advances or borrow more PTO time than is accrued. Any additional approved time off will be unpaid.
- 2. Request for Approval.** Any time an employee is absent from work, the employee must request approval for the absence. Use of PTO is subject to approval by the supervisor or manager and using the appropriate leave request form which should be approved and submitted to the Attendance Clerk.
- 3. Carry Over/ Pay-Out of Unused, Accrued PTO.** At the end of each fiscal year (July1- June 30), employees may choose to carry over unused PTO days within the permitted CAP or be paid out any remaining unused PTO. Full-time employees may carry over up to three 3 years of unused PTO time into the next calendar year as follows (CAP):
 - 10 month (196 day) employees may carry over up to 30 days
 - 11 month (220 day) employees may carry over up to 33 days
 - 12 month (240 day) employees may carry over up to 36 days

Rather than carry-over unused and accrued PTO time, employees may obtain a pay out as follows: The payout amount is 1 work day of pay for each 3 days of unused/accrued PTO time.

4. Transfer of PTO to Co-Worker. An employee may authorize the transfer of some or all of the employee's accumulated Paid Time Off (PTO) time to another employee at SMA. The transfer of PTO time is completely voluntary on the part of the donating employee. The PTO time may only be transferred when the receiving employee has fully exhausted all of his or her existing PTO leave accrual and must be used at the time of transfer. The receiving employee must be on an approved leave status or have other extenuating circumstances that require them to be absent from work. No employee may donate PTO time from anywhere other than SMA or transfer PTO time to anyone other than an SMA employee.

- Employees who are separating employment may not transfer PTO time to another employee.
- Any donated PTO days that are in excess of what is needed will be pro-rated and returned to the donor.
- Employees who are separating employment may not extend their service using PTO days. Any remaining days will be paid out in the format stated above.
- Spouses or significant others may only donate PTO days to the other if the stipulations in number four above are satisfied.
- If the donor or recipient of PTO have considerably different compensation, SMA may adjust the donation amount to reflect this difference.

5. Planning Periods and PTO Time. The planning period is part of the workday; if an employee seeks to take time off during a planning period, PTO should be requested in advance.

BEREAVEMENT LEAVE

Employees shall be entitled to bereavement leave with pay for two (2) days in the event of a death in the employee's immediate family. This time off is not charged against your PTO time. Members of the employee's immediate family are considered to be:

Mother or Father

Spouse or Domestic Partner

Child or Grandchild

Brother or Sister

Grandmother or Grandfather

Legal Guardian

Counterparts by marriage or domestic partner relationships

JURY DUTY

SMA recognizes and values jury duty service. Employees will be excused from work to perform this civic duty.

If you are summoned to appear for jury duty or you appear in court or appear on behalf of SMA, you will be excused from work and paid your regular pay for up to five days. This time will not be charged against your PTO pool.

If you appear in court for personal reasons, the time will be deducted from your accrued and unused PTO time or it will be unpaid. All other time off for jury or witness duty will be unpaid

unless otherwise required by applicable law or unless you elect to use accrued/unused PTO time.

If you are summoned for jury duty or are subpoenaed as a witness, you are expected to present the summons or subpoena to the CEO as soon as possible. Prompt (and, where possible, advance,) notice of your expected time off work is mandatory so that necessary assignment changes can be arranged to accommodate for your absence. When you return from jury or witness duty you will be required to give to the CEO a statement from the court certifying the dates and times you were performing your service for the court.

Employees will not be reimbursed for meals, travel expenses, or lodging incurred while serving as a juror.

BREAKS

Nursing Mother's Break Time

The Academy will provide a clean, private (non-bathroom) area and reasonable time for nursing mothers to express milk during the workday. Please advise the CEO or the Head of School of the need and arrange break time with your supervisor.

LEAVE

Military Leave

Employees who serve in the U. S. military or state national guards may take the necessary time off to fulfill this obligation, and will retain all of their legal rights for continued employment under existing laws. Non-exempt employees have the option of taking the leave without pay or applying any available paid time off to the leave.

Military leave for exempt employees will be paid (although their salary may be offset by any military pay received) unless the leave is for a full week or more; if the leave is unpaid, exempt employees will have the option of applying any accrued and unused PTO.

This policy hereby incorporates USERRA and its requirements and does not provide any greater or lesser benefits than provided by law. Please see <http://www.osc.gov/userra.htm> for detailed information of USERRA. An employee who learns of the need to be absent from work for military duty must advise and present a copy of the orders to report for service to the CEO on the next working day. However, if an employee is unable to provide prior notice due to an emergency, the employee is required to provide verbal notice as soon as possible, and the orders must be submitted upon the employee's return to work.

Domestic Violence Leave

An employee who has been employed by the Academy for three months or more and is a victim of domestic violence or has a family or household member who is a victim of domestic violence may be eligible for unpaid leave of up to three working days in a rolling twelve-month period for the following reasons:

- To seek an injunction for protection against domestic violence, repeat violence, dating violence, or sexual violence;
- To obtain medical or mental health care for themselves or a family/household member to address injuries resulting from domestic violence;
- To seek services from a victim-service association, such as a shelter or rape crisis center;
- To make the employee's home secure from the perpetrator of domestic; and/or
- To seek legal assistance for issues arising from domestic violence or attending or preparing for court related proceedings arising from the act of domestic violence.

Requests for Domestic Violence Leave should be made to the CEO with at least two days advance notice, when possible. Where there is imminent danger to the health or safety of the employee, family, or a household member, an exception may be made to this notice requirement. Employees must exhaust any accrued and unused Paid Time Off (PTO) prior to utilizing unpaid Domestic Violence Leave. Documentation of the need to take Domestic Violence Leave may be required. All information obtained by the Academy will be kept confidential to the extent possible.

If you require an extended leave beyond the 3 days described in this policy, please contact the Head of School or CEO.

Should you perceive any violations of this policy including any retaliation relating to this Leave, notify the CEO in writing of the details immediately.

The Family and Medical Leave Act (FMLA) Policy

Pursuant to the Family and Medical Leave Act (FMLA) eligible employees may take up to twelve weeks of unpaid, job protected leave of absence for qualified family or medical reasons, during a twelve-month period. The period in which FMLA leave may be taken is a rolling 12-month period measured backward from the date an employee commences any leave. Military Family Leave may provide up to 26 weeks of job-protected leave in one single 12-month period, under qualifying circumstances. Leave may be taken on a continuous or intermittent basis if medically necessary.

Impact of leave.

- **Continuous Service.** FMLA leave periods, whether unpaid or covered by other pay category, will be treated as continuous service (i.e. no break-in-service) for purposes of vesting and eligibility to participate in the retirement plan.
- **When Leave is Unpaid. (This does not apply to portions of FMLA leave for which the employee is receiving pay pursuant to a paid leave policy).**

Consistent with SMA's policy for all types of leave, employees retain and are permitted to use any applicable leave, but do not accrue or receive additional vacation while on unpaid FMLA leave. The leave's impact on benefits will be determined by the plan document. If the plan document is silent, benefits will not accrue during unpaid leave. During unpaid leave, employees do not receive paid holiday.

Family Medical Leave Act (FMLA) Eligibility Requirements

To be eligible for FMLA, as of the first day of the requested leave period,

- you must have worked at the Academy for at least twelve months (which need not be consecutive)
- you must work at a location with at least fifty employees within seventy-five miles; and

- you must have worked a minimum of 1,250 hours within the previous twelve-month period.

FMLA Leave Entitlement Types of Qualified FMLA Leave

Qualified FMLA leave may be requested for the following conditions:

- For the birth or adoption of a child, or placement of a foster child, if leave is concluded within twelve months of the birth, adoption or placement. (In any case where both father and mother are employed by the Academy, they shall be granted up to a combined total of twelve weeks of time away from their jobs to care for their newborn or newly placed child.)
- For the care of a spouse, parent or child (under 18 years of age or disabled) with a serious health condition.
- For your own health care if you have a serious health condition that makes you unable to perform the functions of your job.

Definition of a “Serious Health Condition”

A “serious health condition” is an illness, injury, impairment, or physical or mental condition that involves either an overnight stay in a medical care facility, or continuing treatment by a health care provider for a condition that either prevents you from performing the functions of your job, or prevents a qualified family member from participating in school or other daily activities.

Continuing Treatment

Subject to certain conditions, the continuing treatment requirements may be met by:

1. A period of incapacity of more than three consecutive calendar days combined with at least two visits to a health care provider (first visit within seven days of first day of incapacity and second visit, directed by health care provider, within thirty days) or one visit (within seven days of first day of incapacity) and a regiment of continuing treatment, or
2. Incapacity due to pregnancy, including prenatal care, or incapacity due to a chronic condition requiring continuing care by a licensed health care provider (at least two visits in a year) for a long term or chronic health condition that is incurable or so serious that, if not treated, would result in a period of incapacity of more than three calendar days.

FMLA Leave Request and Approval Process Requests for FMLA Leave

To ensure that the Academy is informed of your leave in advance (or in some cases, i.e., unforeseeable leave), you need to complete a “**Request for Family Leave form.**” You may obtain this form from the CEO.

Foreseeable Leave

For leaves that are foreseeable (more than thirty days away - i.e., births or planned medical procedures), you are required to request leave at least thirty days prior to the requested starting date of your leave by completing the **Request for Family Leave form.** Requests for FMLA leave

should be discussed with the CEO.

If less than thirty days' advance notice is provided, you may be required to respond to the Academy's request for an explanation for the lack of notice.

Depending on the circumstances, failure to provide sufficient advance notice may result in the delay of your leave for thirty days after notice is provided. If your leave became foreseeable less than thirty days from the requested start date, you would be required to request leave as soon as the leave date is known. Failure to provide such advance notice may result in delay of leave.

Unforeseeable Leave

If a need for leave was unforeseeable, the employee or authorized designee must advise the Head of School or CEO as soon as practicable and complete the **Request for Family Leave form**.

"As soon as practicable" ordinarily means notice of the need for leave at least prior to the start of your scheduled work period, as required by the Academy's attendance policy.

Notice of Eligibility and Rights & Responsibilities

Upon receipt of a request for Family Leave Form notifying SMA of the need for leave, or when the Academy becomes aware a leave may be for an FMLA-qualifying reason, within five business days, absent extenuating circumstances, the Academy will provide you with a **Notice of Eligibility and Rights & Responsibilities form** that explains whether or not you are eligible to take FMLA. The form will give an employee information on whether or not they qualify for a FMLA job protected leave of absence. In addition, the form will notify employees of rights and responsibilities and any consequences of failure to meet employee obligations

In order for the Academy to be on notice that you may qualify for an FMLA leave, each employee must provide sufficient information.

Each employee must provide a doctor's certification that provides the Academy sufficient information to determine if the absence is FMLA-qualifying.

No additional medical documentation is required following childbirth delivery (without complications), adoption, or placement of a foster child. A medical release to return to work note will be required to be received by the CEO prior to returning to work so it can be determined if there have been any medical restrictions. SMA needs to review the note to see if medical restrictions are required if they are able to be accommodated based upon the requirements of the job.

Where the provided documentation is not clear, is incomplete, or is questionable in nature, the Academy may, in certain circumstances and only the CEO may, contact the health care provider to verify that the information contained on the certification form was completed and authorized by the health care provider signing the document. The Academy may also seek clarification from the health care provider to understand the handwriting on the form or understand the meaning of a response.

Military Family Leave Entitlements

The FMLA also provides for eligible employees to take leave for certain reasons relating to a covered family member's service in the U.S. Armed Forces (including National Guard or Reserves). Except as specifically mentioned below, the provisions of the general FMLA leave policy noted above govern any rights to and obligations under Military Family Leave.

Eligible employees may take qualified FMLA leave for any one, or for a combination, of the following reasons:

"Qualifying Exigency" Leave

Qualifying exigency leave applies when your spouse, son, daughter or parent is a military member on "covered active duty status" (or has been notified of an impending call or order to covered active duty) in the Reserve component of the Regular Armed Forces and you need to address certain qualifying exigencies.

"Covered Active Duty"

Eligible employees may take FMLA leave for a qualifying exigency while the military member is on covered active duty, called to covered active duty status, or has been notified of an impending call or order to covered active duty.

- For members of the Regular Armed Forces, covered active duty is duty during deployment of the member with the Armed Forces to a foreign country.
- For members of the **Reserve components** of the Armed Forces (members of the National Guard and Reserves), covered active duty is duty during **deployment of the member with the Armed Forces to a foreign country under a call or order to active duty in a contingency operation.**

"Deployment to a Foreign Country"

Deployment to a foreign country means deployment to areas outside of the United States, the District of Columbia, or any Territory or possession of the United States. It also includes deployment to international waters.

"Contingency Operation" Definition

A contingency operation generally includes an operation that relates to combat operations, national emergency, or an operation that is designated as such by the Secretary of Defense.

After obtaining and completing a **Request for Family Leave Form** obtained from the Director of Human Resources requesting Qualifying Exigency Leave, employees are required to submit a **Certification of Qualifying Exigency for Military Family Leave Form** within fifteen calendar days, including certain written documentation confirming a military member's "covered active duty."

Types of “Qualifying Exigency”

- Short-notice deployment,
- Military events and related activities,
- Childcare and school activities (such as for arranging alternative childcare),
- Financial and legal arrangements,
- Counseling,
- Rest and recuperation,
- Post-deployment activities (such as reintegration briefings),
- Caring for the parents of the military member on covered active duty,
- Additional activities to address other events which arise out of the covered military member’s active duty or call to active duty status, provided you and the Academy agree that such leave qualifies as an exigency, and agree to both the timing and duration of leave.

If the qualifying exigency leave is requested to meet a covered individual, the CEO may contact such third party to verify that the information provided is accurate.

Injured/Ill Service member Leave

If you are the spouse, son, daughter, parent, or next of kin of a military service member who has suffered a combat injury or illness (a “covered service member”), you may be eligible for leave.

After obtaining the **Request for Family Leave Form from the Director of Human Resources, and completing it** requesting such leave, you are required to submit a **Certification for Serious Injury or Illness of Covered Service member** completed by a health care provider qualified to provide such certifications, within 15 calendar days.

Note: the FMLA definition of a serious illness or injury for current Armed Forces members and covered Veterans are distinct from the definition of “serious health condition” applicable to leave to care for a family member or your own illness or injury.

“Covered Service member” and Covered Veteran Definitions

A “covered service member” is a current member of the Armed Forces, including a member of the National Guard or Reserves, who is undergoing medical treatment, recuperation, or therapy, is otherwise in outpatient status, or is on the temporary retired list, for a serious injury or illness. These individuals are referred to in this policy as “current members of the Armed Forces.” “Covered service member” also includes veterans who are:

- Discharged or released from military service under conditions other than dishonorable at any time during the five year period prior to the first date you take FMLA leave to care for the covered veteran, and
- Undergoing medical treatment, recuperation or therapy for a serious injury or illness.

These individuals are referred to in this policy as “covered veterans.”

“Serious Injury or Illness” Definition

“Serious injury or illness” means:

- In the case of a current member of the Armed Forces, including a member of the National Guard or Reserves -- an injury or illness that was incurred by the covered service member in the line of duty on active duty in the Armed Forces or that existed before the beginning of the member’s active duty and was aggravated by service in the line of duty on active duty in the Armed Forces, and that may render the member medically unfit to perform the duties of the member’s office, grade, rank or rating; and
- In the case of a covered veteran -- an injury or illness that was incurred by the member in the line of duty on active duty in the Armed Forces (or existed before the beginning of the member’s active duty and was aggravated by service in the line of duty on active duty in the Armed Forces) and manifested itself before or after the member became a veteran, and is:
 - A continuation of a serious injury or illness that was incurred or aggravated when the covered veteran was a member of the Armed Forces and rendered the service member unable to perform the duties of the service member’s office, grade, rank, or rating; or
 - A physical or mental condition for which the covered veteran has received a U.S. Department of Veterans Affairs Service-Related Disability Rating (VASRD) of 50 percent or greater, and such VASRD rating is based, in whole or in part, on the condition precipitating the need for military caregiver leave; or
 - A physical or mental condition that substantially impairs the covered veteran’s ability to secure or follow a substantially gainful occupation by reason of a disability or disabilities related to military service, or would do so absent treatment;
 - An injury, including a psychological injury, on the basis of which the covered veteran has been enrolled in the Department of Veterans Affairs Program of Comprehensive Assistance for Family Caregivers.

Duration of Military Family Leave

Qualifying Exigency Leave: You may take up to twelve workweeks of leave during any twelve-month period, including on an intermittent basis. If you request qualifying exigency leave to spend time with a military member on Rest and Recuperation leave, you may take up to fifteen calendar days of leave.

Injured or Ill Service member Leave: You may take up to twenty-six workweeks of leave during a single twelve-month period to care for a service member. The single twelve-month period begins on the first day you take leave to care for the service member. Leave to care for any injured or ill service member, when combined with other FMLA-qualifying leave, may not exceed twenty-six weeks in a single twelve-month period.

Reinstatement Following Leave

You must keep the Head of School and CEO informed in writing of your expected return date and make any requests for extensions of leave in writing, with a new medical certification showing the need for extension in appropriate circumstances. Approval of any extensions will also be in writing. If your anticipated return to work date changes and it becomes necessary for you to take more or less leave than originally anticipated, you must

provide the Academy with reasonable notice (i.e., within two business days) of your changed circumstances and new return to work date. If you give the Academy unequivocal written notice of your intent not to return to work, you will be considered to have voluntarily resigned and the Academy's obligation to maintain health benefits (subject to COBRA requirements) and restore you to your position will cease.

Reinstatement to Former Position

Upon return to work from FMLA leave on the specified date, you will be restored to your former position (provided you would have retained that position if leave were not taken), or to an equivalent position.

Failure to Return to Work from Leave

Failure to return to work from a leave on the specified date may be considered a voluntary resignation. If you are on a personal medical leave other than for childbirth (without complications), adoption, placement of a foster child or to care for a family member, you will be required prior to returning to work to present to the CEO a **Certification of Fitness to Return for Duty** that you are released to return to work, with or without restrictions and that you are able to perform the essential functions of your job with or without a reasonable accommodation. This release must be reviewed by the CEO prior to an employee's return to guarantee that the Academy is able to provide any required accommodations or restrictions.

Denial of Reinstatement

An employer is not required to reinstate an employee to the same or similar position if:

- The leave was fraudulent obtained;
- The employee would have been laid off regardless of the leave;
- The employee was unable to perform an essential function of the position with or without a reasonable accommodation because of a physical or mental health condition;

or

- The employee is a "key" employee (salaried and among the highest paid ten percent of the Academy's employees employed within seventy-five miles of the worksite), and reinstatement would cause substantial and grievous economic injury to the Academy's operations.

Coordination of FMLA Leave with Other Leave Policies

The FMLA does not affect any federal, state or local law prohibiting discrimination, or supersede any State or local law that provides greater family or medical leave rights. Prohibition against Retaliation

The Academy prohibits anyone from:

- Interfering with, restraining, or denying the exercise of any right provided under FMLA; or
- Discharging or discriminating against any person for opposing any practice made unlawful by FMLA or involvement in any proceeding under or relating to FMLA.

If you believe your FMLA rights have been violated, you should contact the CEO immediately. The Academy will investigate any FMLA complaints and take prompt and appropriate remedial action to address and/or remedy any FMLA violation.

FMLA Policy Questions

Any questions regarding this policy should be directed to the CEO. Report any perceived violations of this policy including any retaliation relating to this Leave to the CEO.

Leaves of Absence.

In the event an employee is permitted to take any other leave of absence for any reason, the employee must also take any applicable paid leave at the same time if paid leave is available other than in the rare circumstances that the laws prohibits the enforcement of such policies for particular leaves of absence, for example, the military leave law. At the conclusion of the leave, if the employee is unable to return to work and perform the essential functions of the job with or without a reasonable accommodation the employee will be terminated from the Academy. Employees seeking leave related accommodations, including following expiration of an approved leave, should submit requests in writing to the CEO.

DISCRETIONARY UNPAID LEAVE OF ABSENCE

If extenuating circumstances have occurred where an employee is not eligible for any other leave the Academy, will review the need for such leave on a case-by-case basis. Such leave it typically not job-protected leave and the employee may need to identify an open position for which the employee is qualified and apply for the position.

Consistent with Company policy for all types of leave, one will not accrue PTO days or other benefits while on unpaid FMLA leave. Additionally, one will not be paid for holidays that occur during the leave. However, the leave period will be treated as continuous service (i.e., no break-in-service) for purposes of vesting and eligibility to participate in the Company's retirement plan.

Section 9:

GRIEVANCES WHILE EMPLOYED BY SMA, TERMINATION APPEALS AND LEAVING THE ACADEMY

GRIEVANCES WHILE EMPLOYED BY SMA

The Academy reserves the right to terminate an employee's employment at SMA at any time, for any lawful reason, with or without notice and with or without cause. At times, and in lieu of termination, the Academy may implement disciplinary actions or make other changes to an employee's working environment or other employment related circumstances. In these cases, employees seeking to change or appeal some action of the Academy relating to the employee's employment should comply with this Grievance policy.

Step One. Speak to the supervisor or manager one-on-one regarding the details of the Grievance and the specific request, referencing this policy. If the grievance is not resolved then proceed to Step Two.

Step Two. If Step One is unsuccessful or is determined by the employee to be inappropriate under the circumstances, the employee should contact the Head of School regarding the details of the Grievance and the specific request, referencing this policy for resolution.

Step Three. If Step Two is unsuccessful or is determined by the employee to be inappropriate under the circumstances, the employee should set up a time to meet with the CEO. The employee will speak with the CEO about their concerns and work to find a resolution to the issues.

Step Four. If the employee is still dissatisfied, the Employee may prepare a written summary of the employee's position. The written grievance should include the specific details of the Grievance and reference this policy and present it to the Audit Chair of the Board of Directors.

TERMINATION OF EMPLOYMENT APPEALS

If an employee's employment at SMA is terminated, the employee will be provided a letter of termination and an appeal form. The employee will have 15 calendar days to return the appeal form to the CEO. Once the appeal is received, the CEO will review the information provided and make a final determination as to whether the termination decision shall be upheld or revised.

LEAVING THE ACADEMY

GIVING NOTICE/RESIGNATION

We hope that you will continue to enjoy and benefit from your employment with the Academy. We realize that you may choose to leave your position and you have the right under Florida statute to terminate your employment relationship with the Academy at any time, for any reason, with or without cause, and with or without notice.

- Any employee who wishes to resign is requested to submit his/her resignation in writing addressed to the Head of School. We request that SMA is given at least a two week notice. During that two week notice period, departing employees may not use accrued and unused PTO time to take time off during the notice period.

RETURN OF ACADEMY PROPERTY

Any Academy property in your control or possession, such as keys, ID badges, phones, computers, passwords, files, cadet documents, Academy documents, or other property must be returned at the time of your separation, or whenever requested by the Head of School or CEO. You may be responsible for paying for any lost or damaged items. The value of any property issued and not returned may be deducted from your paycheck only in compliance with the Fair Labor Standards Act.

EXIT INTERVIEWS

If you choose to leave the Academy, we ask that you share your reasons for leaving and/or any other impressions you may have about the Academy during an Exit Interview with the CEO or designee. It is hoped that this exit interview will help the Academy provide insights into possible improvements.

YOUR FINAL CHECK

You will be paid your final wages in the same manner paid during employment. It will be paid on your next regularly scheduled pay date, in accordance with the Fair Labor Standards Act.

EMPLOYMENT REFERENCE CHECKS

Any reference check request should be directed to the CEO. Other employees should not provide reference check information. The Academy provides verification of positions worked and dates of employment. The Academy will require a signed authorization form to provide any compensation information.

Retirement

Any employee who plans to retire shall concurrently submit his/her written resignation notice to the Head of School and his/her application to the Florida Retirement System to claim benefits earned. One month advance notice is requested.

APPENDIX 1

REPORTING STRUCTURE AND ACADEMY CONTACT INFORMATION

The Academy desires to provide employees with the correct information necessary to communicate with various Academy representatives.

The titles, names and contact information of the Administrators are found below. In the event that the referenced individual(s) is/are unavailable, an employee should communicate with another listed member of Senior Administration or, if appropriate, a member of the Board or Director's Audit Committee. Information about who is on the Board of Directors Audit Committee is located on the Sarasota Military Academy's website under Board of Directors.

Senior Administration means:

CEO and Head of School (High School)

Name: SMA-COL Christina Bowman

Phone: 941-926-1700 ext. 287

Address: 801 N. Orange Ave. Sarasota, Fl. 34236

Email: Christina.Bowman@oursma.org

Assistant Head of School (High School)

Name: SMA-LTC Caitlin West

Phone: 941-926-1700 ext. 235

Address: 801 N. Orange Ave. Sarasota, FL 34236

Email: Caitlin.West@oursma.org

Assistant Head of School (High School)

Name: SMA-LTC Abby Williams

Phone: 941-926-1700 ext. 289

Address: 801 N. Orange Ave. Sarasota, Fl. 34236

Email: Abby.Williams@oursma.org

Head of School (Middle School)

Name: SMA-COL Cheryl Korwin

Phone: 941-877-7737 ext. 3110

Address: 3101 Bethel Lane, Sarasota, FL 34240

Email: Cheryl.korwin@oursma.org

Assistant Head of School (Middle School)

Name: SMA-LTC Bryan Burns

Phone: 941-877-7737 ext. 3104

Address: 3101 Bethel Lane, Sarasota, Fl. 34240

Email: Bryan.burns@oursma.org

APPENDIX 2

WORK-RELATED DRIVING RULES

Pre-Driving Requirements. Prior to each Work-Related Driving, employee shall:

- **Confirm License and driving record.** Ensure employee has a good and safe driving record.
- **Authorized Passengers.** Allow only Authorized Passengers. “Authorized Passengers” are (i) Academy employees, (ii) Academy related individuals, including Cadets, who are being driven for Academy-related reasons, or (iii) others expressly designated in writing by the Head of School or CEO. Without express permission from the Head of School or CEO the employee shall not transport any family member, pet, hitchhiker, or un-authorized passenger.

OPERATING REQUIREMENTS

- Employees shall drive safely at all times and strictly comply with the following Operating Requirements for Work-Related Driving:
- **Safe vehicle.** Refrain from operating a vehicle that appears unsafe.
- **Laws.** Comply with all licensure, traffic and driving laws, rules and ordinances.
- **Speed Limit.** Drive within the speed limit and at speeds that are safe for road conditions.
- **Roadways.** Drive only on suitable roadways.
- **Seatbelts.** Refrain from driving unless everyone in the vehicle is properly restrained with a seatbelt.
- **Device Use.** Remove all distractions, which includes refraining from using a cellular phone, smart phone, tablet, computer or texting or other communication, reading or research device.
- **Maps/Directions.** Refrain from touching or viewing electronic or other mapping devices. In the event employee perceives the need to view an electronic mapping device while driving, safely pull over to a safe place prior to reading such device. Devices providing oral instructions are permitted so long as the device is activated prior to employee driving.
- **Eating.** Refrain from eating while driving.
- **Other Distractions.** Refrain from engaging in any activities that could conceivably distract employee from driving safely.
- **Smoking.** Comply with the Academy’s no smoking policy while in inside a vehicle.
- **Accidents and Injuries.** Report any accidents promptly to the local law enforcement agency, and as soon as possible report the accident to the Director of Finance.
- Refrain from speaking to any insurance company or attorney representing anyone other than the employee or the Academy with regard to an accident or injury without express direction from employee’s own insurance company, attorney, or the Head of School.

Please turn to the last page for acknowledgement and signature.

Acknowledgement of Receipt and Responsibility to Read and Understand

I understand that it is my responsibility to read and become familiar with this handbook and to recognize and comply with the Academy’s policies, rules and guidelines. I also understand that these policies do not create a contract, but that reading each is one of my job duties. I agree to read the handbook within thirty days of receipt and to direct any questions that I have to the CEO. I understand that the information contained in the handbook is important.

Please sign below to acknowledge that you understand and will comply with the Academy’s policies.

Printed Name: _____

Signature: _____

Date: _____

Return this completed signature page to your Head of School.

W4SMA Donations and Grants

Running List

Grants

- September 2024: ARDC (Amateur Radio Digital Communications) - \$29,875: W4SMA Tower, HF Beam and VHF/UHF Diamond and M2 Satellite-Tracking Antennas, Main W4SMA Station Transceivers and Related Equipment
- October 2024: Donors Choose - \$798: Oscilloscope, Multimeters, Rechargeable Batteries
- May 2025: Donors Choose - \$1211: Class Set of Transceivers, Base Stations
- August 2025: ARRL (American Radio Relay League) - \$3,179: W4SMA Lab Station SDR (Software Defined Radio) Receiving Stations and Corresponding Antennas, Lab Soldering Stations

Donations

- September 2024: George Slade Cargill - ~\$1,500: ICOM Transceiver, Power Supply, Antenna Tuner with Antennas
- January 2025: George T. Becht - ~\$1,000: Antenna Rotator, 6m Beam
- February 2025: Leland Bedwell - \$500: Classroom Toolboxes and Toolsets
- May 2025: Sunlife Amateur Radio Club (AZ) - \$500 and Materials Donation of Handheld Transceivers, Mesh Antenna Systems, Repeater

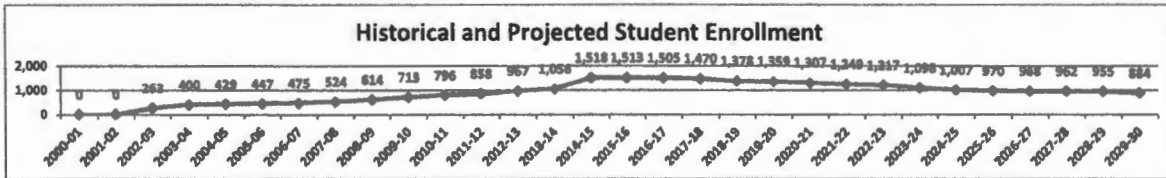
Rough Estimate of Funds Raised / Received: \$38,563 (August 2025)

The School Board of Sarasota County, Florida
Student Enrollment for the Period 2019-2020 through 2029-2030
Historical Student enrollment by Grade level information (Based upon October of each school year)

Sarasota Military - Charter School (consolidated)

School Principal:	Christine Bowman	Year School Opened	2002
School Address:	801 Orange Avenue Sarasota, FL 34236	Buildings and Property owned by charter	
School Phone:	(941) 926-1701	Free / Reduced Lunch Percentage	55.76%
School Web Site:	sarasotamilitaryacademy.com	Title One School	No

Student Enrollment by Grade Level										
Grade Level	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028	2028-2029	2029-2030
Pre Kindergarten NON FEFP	0	0	0	0	0	0	0	0	0	0
Pre Kindergarten FEFP (ESE)	0	0	0	0	0	0	0	0	0	0
Kindergarten	0	0	0	0	0	0	0	0	0	0
First	0	0	0	0	0	0	0	0	0	0
Second	0	0	0	0	0	0	0	0	0	0
Third	0	0	0	0	0	0	0	0	0	0
Fourth	0	0	0	0	0	0	0	0	0	0
Fifth	0	0	0	0	0	0	0	0	0	0
Sixth	200	177	197	158	124	124	124	124	124	124
Seventh	208	184	196	175	152	118	124	124	124	124
Eighth	206	207	177	158	168	146	118	124	124	124
Ninth	176	182	191	167	142	196	146	118	124	124
Tenth	191	173	172	171	151	130	196	146	118	124
Eleventh	173	171	138	147	141	131	130	196	146	118
Twelfth	153	155	146	122	129	125	131	130	196	146
Total by Grade	1,307	1,249	1,217	1,098	1,007	970	968	962	955	884
Students by Program funded through the Florida Education Finance Program										
Basic Education	1,012	940	894	816	748	721	719	714	710	657
E.S.O.L.	33	32	31	39	36	34	34	34	34	31
Students with Disabilities k-3	0	0	0	0	0	0	0	0	0	0
Students with Disabilities 4-8	81	98	111	77	71	68	68	67	67	62
Students with Disabilities 9-12	129	126	118	100	91	88	88	87	87	80
ESE Level 4	0	0	0	0	0	0	0	0	0	0
ESE Level 5	0	0	0	0	0	0	0	0	0	0
Career Education	18	14	28	35	32	31	31	30	30	28
Total Students by Program	1,274	1,210	1,182	1,066	978	942	940	934	928	858



Principal's Certification

"I have reviewed the above student enrollment projection for the school year 2025-2026"

Signature and Date *Christina Bowman*

I am in agreement with the 2025-2026 projection Circle One Yes No

DISTRICT SCHOOL	2024-25 Actual Count (day specific)													2025-26 Budgeted Enrollment													2025-26 Actual Count (day specific)													Dif vs Budget	Dif vs LY				
	KG	1	2	3	4	5	6	7	8	9	10	11	12	Total	KG	1	2	3	4	5	6	7	8	9	10	11	12	Total	KG	1	2	3	4	5	6	7	8	9	10			11	12	Total	
College Prep Academy At Wellen Park	64	66	50	48	36	56	39	45						404	65	70	66	51	49	40	57	40	44					482	79	64	75	55	49	45	61	37	30						495	13	91
Dreamers Academy	103	103	96	102	64	43								511	108	108	108	110	108	66	45							653	107	104	104	92	81	59	37								584	-69	73
Imagine School At North Port	92	88	89	96	89	93	109	118	111	90	83	76	70	1204	83	87	86	93	94	99	114	115	117	96	83	83	74	1218	108	114	94	97	96	94	131	124	130	97	83	65	66	1298	80	94	
Imagine School At Palmer Ranch	38	40	51	37	39	48	37	65	55					410	37	36	36	56	43	37	55	41	68					409	32	30	35	48	43	35	46	28	54					351	-58	-59	
Innovation Academy SRQ	12	23	12	21	16	15								99	12	11	21	12	11	13								80	10	11	16	11	8	17								73	-7	-26	
Island Village Montessori School	56	69	70	52	62	70	53	48	46					526	54	62	74	74	64	62	56	44	45					535	40	63	74	66	61	57	53	51	38					503	-32	-23	
Sarasota Academy Of The Arts	23	12	16	19	13	22	27	31	32					195	23	25	14	17	21	14	31	28	30					203	14	24	16	18	17	16	33	22	28					188	-15	-7	
Sarasota Military Academy						124	150	168	143	152	138	122	997						124	118	146	196	130	131	125	970							123	126	137	180	135	134	111	946	-24	-51			
Sarasota School Of Arts/Sciences						252	250	241					743						255	245	243					743							254	246	229				729	-14	-14				
Sarasota Suncoast Academy	83	78	78	89	87	80	103	100	110				808	77	92	85	78	92	88	108	108	107					835	59	76	77	75	87	87	94	106	102				763	-72	-45			
Sky Academy Englewood						110	110	109					329						125	126	129						380							124	122	108				354	-26	25			
Sky Academy Venice						89	98	104					291						88	88	99						275							125	87	99				311	36	20			
State College Of Fla Coll School-Venice										93	83	0	0	176									93	88	66	61	308										99	93	0	1	193	-115	17		
Student Leadership Academy						110	110	107					327						110	110	110						330							110	110	110				330	0	3			
CHARTER SCHOOL TOTAL	471	479	462	464	406	427	1053	1125	1083	326	318	214	192	7020	459	491	490	491	482	413	1168	1063	1138	385	301	280	260	7421	449	486	491	462	442	410	1191	1059	1065	376	311	199	178	7119	-302	99	

SARASOTA MILITARY ACADEMY

Senior Army Instructor
801 North Orange Avenue
Sarasota, Florida 34236

26 August 2025

MEMORANDUM FOR GOVERNING BOARD, SARASOTA MILITARY ACADEMY

THRU: Superintendent Sarasota Military Academy

SUBJECT: Significant Activities Report (SAR)

Significant Activities AUG 2025:

- **5-7 AUG 2025:** SMA Leadership Camp (SMA HS Campus).
- **8 AUG 2025:** SMA New Student orientation
- **16 AUG 2025:** SMA Raider Try-Outs (SMA Prep Campus).
- **15 AUG 2025:** First Formation AY 2025-2026 (SMA H.S. Campus)
- **25 AUG 2025:** SMA Service Academy Cohort Information Brief (SMA H.S. Campus).
- **27 AUG 2025:** SMA Service Academy Cohort Physical Training (SMA H.S. Campus).
- **29 AUG 2025:** SMA Service Academy Cohort Writing Lab (SMA H.S. Campus).

Significant Activities (FEB 2025):

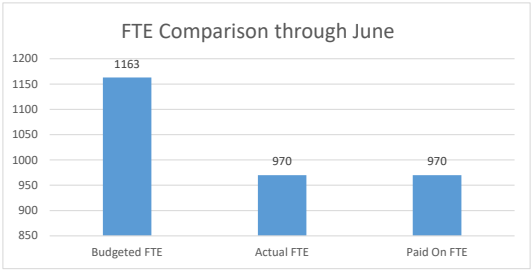
- **20 SEP 2025:** SMA Raiders: Braden River Rumble (Braden River High School)
- **27 SEP 2025:** SMA Raider Invitational (SMA Prep Campus)

SAI Summary and Outlook:

- **Summary:** The SMA JROTC Department has had a fantastic start to the School Year. Our First Semester emphasis is on SMA Standards of Conduct & Appearance. The department's 1st QTR Mission is cultivating the SMA Ethos which will drive the end product of a professionally formed and disciplined unit that reflects the values imbued in Our Personal Mission Statement_ "A Lifetime of Service." Our Raider Team is currently in full season, and preparing for upcoming meets at Braden River and SMA Prep. We have finalized the venue for the 2025 SMA Military Ball. The event will be hosted from 5:30-10:00 PM at the Lakewood Ranch Country Club. We are looking forward to a first class event to celebrate our outgoing Senior Class.
- **Outlook:** SY 2025-2026 began with a full complement of tasks and excitement for the SMA JROTC Department. We have a strong team of dedicated cadre ready to serve the school and its outstanding Cadet Body by emulating and enforcing the standards of professionalism that are at the heart of our mission at SMA.

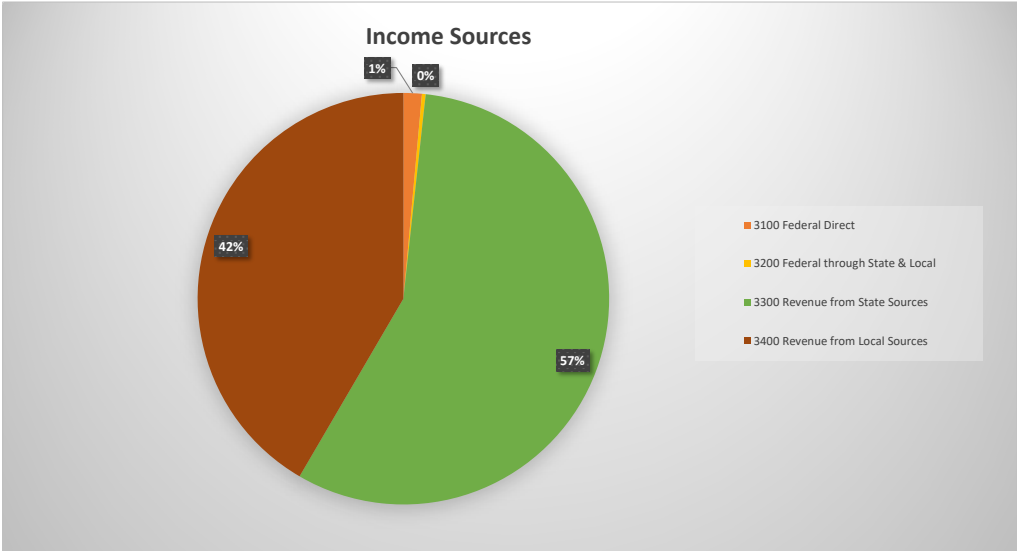
RUSSELL R. OSTERFELD
MAJ (Retired), U.S. Army
JROTC, Senior Army Instructor

Profit and Loss Pie Charts through June 2025



Income		
3100 Federal Direct	\$	199,163
3200 Federal through State & Local	\$	40,353
3300 Revenue from State Sources	\$	7,831,357
3400 Revenue from Local Sources	\$	5,744,708

Total Revenue \$13,815,581



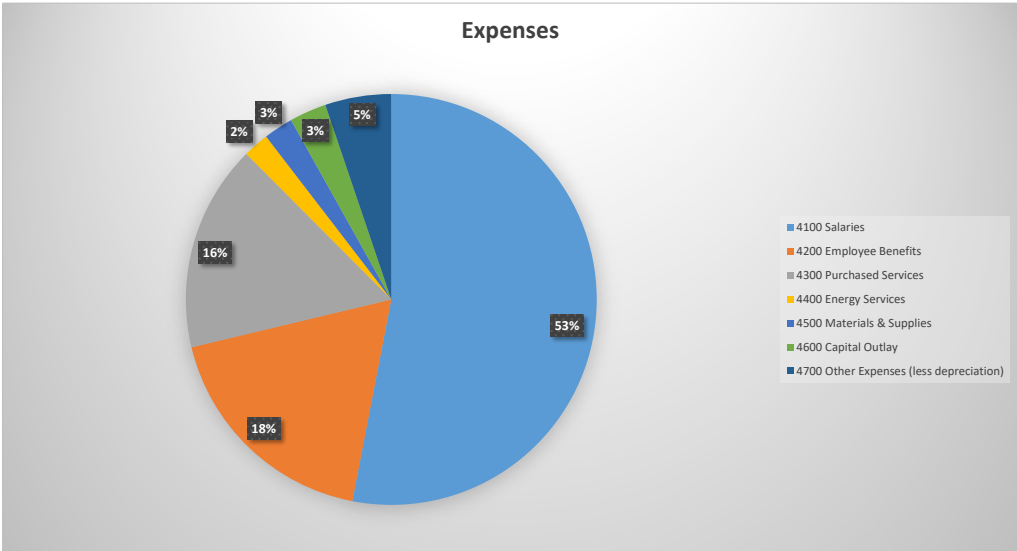
Expenses		
4100 Salaries	\$6,490,182	
4200 Employee Benefits	\$2,228,865	
4300 Purchased Services	\$1,990,857	
4400 Energy Services	\$250,130	
4500 Materials & Supplies	\$282,957	
4600 Capital Outlay	\$356,319	
4700 Other Expenses (less depreciation)	\$636,624	

Total Operating Expenses \$12,235,934

Net Operating Income \$1,579,647

Depreciation Expense \$703,129

Net Income \$876,518



Salaries & Benefits Equal 71 % of Operating Budget

Sarasota Military Academy
Balance Sheet- By Campus
As of June 30, 2025

	Total
ASSETS	
Current Assets	
Bank Accounts	
1110 Cash and cash equivalents	2,082,229
8-1111 Sport Team Bank Accounts	29,186
Total Bank Accounts	\$ 2,111,415
Other Current Assets	
1210 Deposits	44,483
1220 Due from Other Governments	14,759
1230 Prepaids	403,729
Total Other Current Assets	\$ 462,971
Total Current Assets	\$ 2,574,386
Total Fixed Assets	\$ 18,415,056
TOTAL ASSETS	\$ 20,989,442
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Total Accounts Payable	\$ 57,073
Total Credit Cards	\$ 68,891
Total Other Current Liabilities	\$ 1,063,731
Total Current Liabilities	\$ 1,189,695
Total Long-Term Liabilities	\$ 8,302,479
Total Liabilities	\$ 9,492,174
Equity	
3010 Invested In Capital Assets, Net	8,812,050
3020 Temporarily Restricted Net Asse	71,194
3030 Unrestricted Net Assets	1,737,506
Net Income	876,517
Total Equity	\$ 11,497,268
TOTAL LIABILITIES AND EQUITY	\$ 20,989,442

Tuesday, Aug 19, 2025 10:10:37 AM GMT-7 - Accrual Basis

\$2,574,386 - \$1,189,695 = \$1,384,691 Working Capital

Ratio of Assets to Liabilities = \$2,574,386 / \$1,189,695 = 2.16

Sarasota Military Academy

Budget vs. Actuals: FY25 Budget - FY25 P&L

July 2024 - June 2025

12 Months in should be 100%

	TOTAL		
	ACTUAL	BUDGET	% OF BUDGET
Income			
3100 Federal Direct	199,163	211,080	94.00 %
3200 Federal Through State & Local	40,353	41,218	98.00 %
3300 Revenue from State Sources	7,831,357	8,122,101	96.00 %
3400 Revenue from Local Sources	5,744,708	5,427,321	106.00 %
Total Income	\$13,815,580	\$13,801,720	100.00 %
GROSS PROFIT	\$13,815,580	\$13,801,720	100.00 %
Expenses			
4100 Salaries	6,490,182	6,656,556	98.00 %
4200 Employee Benefits	2,228,865	2,427,922	92.00 %
4300 Purchased Services	1,990,857	2,070,461	96.00 %
4400 Energy Services	250,130	284,532	88.00 %
4500 Materials & Supplies	282,957	301,843	94.00 %
4600 Capital Outlay	356,319	237,721	150.00 %
4700 Other Expenses	1,339,753	1,338,449	100.00 %
Total Expenses	\$12,939,063	\$13,317,484	97.00 %
NET OPERATING INCOME	\$876,517	\$484,236	181.00 %
NET INCOME	\$876,517	\$484,236	181.00 %

1/4 Penny Tax (new this year) bolstered up our income to get us to 100% budgeted income.

Sarasota Military Academy

Profit and Loss - YTD - By Campus

July 2024 - June 2025

	HS	PREP	TOTAL
Income			
3100 Federal Direct	199,163		\$199,163
3200 Federal Through State & Local	23,022	17,331	\$40,353
3300 Revenue from State Sources	4,309,924	3,521,433	\$7,831,357
3400 Revenue from Local Sources	3,342,682	2,402,026	\$5,744,708
Total Income	\$7,874,790	\$5,940,790	\$13,815,580
GROSS PROFIT	\$7,874,790	\$5,940,790	\$13,815,580
Expenses			
4100 Salaries	3,665,294	2,824,888	\$6,490,182
4200 Employee Benefits	1,232,546	996,319	\$2,228,865
4300 Purchased Services	1,054,396	936,461	\$1,990,857
4400 Energy Services	103,605	146,524	\$250,130
4500 Materials & Supplies	188,270	94,688	\$282,957
4600 Capital Outlay	215,937	140,382	\$356,319
4700 Other Expenses	879,386	460,367	\$1,339,753
Total Expenses	\$7,339,432	\$5,599,630	\$12,939,063
NET OPERATING INCOME	\$535,358	\$341,160	\$876,517
NET INCOME	\$535,358	\$341,160	\$876,517

Mainly due to the unexpected 1/4 penny tax of over \$700K

William Scott Wallace
15805 Castle Park Terrace
Lakewood Ranch, FL 34202
scottwallace9@gmail.com
757-880-5886(mobile)

Presentation of Qualifications

A former 4-star General Officer. A US Army leader with extensive experience at the operational and strategic levels of leadership with 39 ½ years of military experience spanning five decades. A visionary senior executive and manager with a record of excellence in military operations, large-scale organizational management, and innovative leadership who has successfully applied those skills in the civilian sector. Over thirty-nine years of experience in positions of responsibility - shaping strategy, identifying requirements, structuring and leading organizations to compete effectively, producing outstanding results. A 2015 Board of Directors Governance Fellow of the National Association of Corporate Directors (NACD). Named a Distinguished Graduate of the United States Military Academy at West Point (2018), Member of the Fort Leavenworth Hall of Fame (2018). Maintains a Top Secret security clearance.

Experience and Work History

Independent Director and Consultant

(Dec 2008 – Present)

- Board of Directors of CACI International, Inc. Membership on the company's Audit, Security and Risk, Culture, and Strategic Assessment Committees. Chairman of CACI's investor Relations Committee. (2009-2024)
- Board of Directors of FLYER Next, LLC.
- Board of Directors of Oshkosh Corporation, Inc. Membership on the company's Human Relations Committee. (2010-2019)
- Member of MITRE Corporation's five-person Army Advisory Board. (2009-2018)
- Senior Advisor and lead faculty member for Leader Development and Education for Sustained Peace (LDESP) program of the Naval Post Graduate School (2008-2012).
- Provides expert military and defense consultation to General Dynamics Mission Systems Inc., AeroVironment Inc., Raydon Inc., Flyer Defense and others (2009-2023)
- Member of the Executive Advisory Council of Mission Readiness - promoting youth health, fitness and education. (2010-2023)
- Member of the National Security Advisory Council of the US Global Leadership Coalition - dedicated to strengthening America's national security via increased use of non-military power.
- Chairman of the Senior Executive Associates of the Army Aviation Association of America (Quad-A). (2012-2022)

Commanding General, US Army Training and Doctrine Command

(Oct 2005 – Dec 2008)

- Responsible for recruiting, training and educating the Soldiers of the US Army; developing its leaders; supporting training in units; developing doctrine; establishing materiel requirements; establishing individual and organizational standards for the Army. Additionally responsible for Army JROTC and ROTC programs across the United States.
- Directly responsible for 50,000 Soldiers and Department of the Army Civilian employees across 33 Army schools on 16 installations in the US. Responsible for the efficient and effective management of a \$5.2 billion organizational budget.
- Architect of the continuing wartime reorganization of the US Army; developing the organizational, technical, and war fighting requirements for Army modernization; responsible for streamlining

processes and procedures to include the reorganization of the Command to comply with Base Realignment and Closure legislation.

Command General, US Army Combined Arms Center

(Jul 2003 – Oct 2005)

- Responsible for the resident and non-resident intellectual development of Army leaders across all cohorts (officer, warrant officer, non-commissioned officer, and civilian).
- Responsible for support to organizational training and combat mission rehearsal training of Army organizations through the Army's Combat Training Center program.
- Responsible for the collection of lessons from ongoing operations and the development of new and emergent Army and Joint doctrine, providing the intellectual foundation for leader and organizational development under highly complex, uncertain and ever-changing conditions.

Commanding General, Fifth United States Corps

(Jun 2001 – Jun 2003)

- Commander of a US Army Corps in the Republic of Germany. Responsible for over 95,000 soldiers and family members, thousands of pieces of equipment, and an annual operating budget of \$250 million.
- Commander of Fifth US Corps during Operation Iraqi Freedom (OIF). Lead the Corps' 4 divisions and 140,000 Soldiers in the liberation of Baghdad; subsequently directed the occupation of western and northern Iraq and transition to stability operations.
- Incorporated new equipment, mission command systems, and techniques into the Corps' operations prior to and during OIF resulting in unprecedented speed, situational understanding and combat effectiveness.

Commander, Joint Warfighting Center, Joint Forces Command

(Jun 1999 – Jun 2001)

- Responsible for world-wide Joint training support to regional and functional Combatant Commanders.
- Responsible for the development and maintenance of Joint-capable models and simulations for use in Joint training and Joint exercises.
- Responsible for the development and distribution of Joint training policy and Joint doctrine.
- Responsible for the development and conduct of Joint flag officer education and training during the National Defense University's CAPSTONE curriculum via the Joint Operations Module.

Commanding General, 4th Infantry Division, Ft. Hood, Texas

(Jun 1997 – Jun 1999)

- Commander of the US Army's first "digitized" division; incorporated new C4ISR technology into Division operations. Developed techniques and procedures for the integrated use of new technology through observation and experimentation.
- Responsible for the split-based operations a division consisting of 17,000 Soldiers, 7000 pieces of equipment worth \$4 Billion, and with an annual operating budget of \$110 Million.

Commanding General, National Training Center

(Jun 1995 – Jun 1997)

- Responsible for the development and execution of tough, realistic training for each of the Army's US-stationed combat brigades.
- Responsible for the maintenance of the National Training Center's combat instrumentation system, and development of a vision and the requirements for its modernization.
- Insured absolute stewardship of 643,000 acres of environmentally sensitive training land in the high Mojave Desert, effectively balancing training use and environmental sensitivity.
- Responsible for quality of life programs for the Fort Irwin military and civilian community of over 6000 soldiers and family members. Dramatically expanded housing and services to the remote community.

Education

Bachelor of Science, United States Military Academy, 1969

Master of Science, Operations Research, US Naval Post Graduate School, 1977
Master of Arts, International Relations, Salve Regina College, 1989
Master of Arts, National Security Affairs, United States Naval War College, 1989



William S. Wallace, General, US Army (Retired)

General Wallace retired from active duty on 1 January, 2009 after 39 ½ years of active service that spanned 5 decades. Since his retirement General Wallace has served as an independent defense consultant operating out of his home in Lakewood Ranch, Florida. Additionally, he has served on the Board of Directors of FLYER Next, LLC. And is a past member of the Boards of Directors of Oshkosh Corporation (2010-2021) and CACI International (2009-2024).

General Wallace was born in Chicago, Illinois on 31 December, 1946. He was commissioned as an Armor officer from the United States Military Academy in 1969. General Wallace holds Masters Degrees from the Naval Postgraduate School in Operations Research, Salve Regina University in International Relations, and from the Naval War College in National Security Affairs.

General Wallace's last US Army assignment was as Commander, US Army Training and Doctrine Command (TRADOC) where he was responsible for 32 Army schools across 16 installations and for recruiting, training and educating Army Soldiers; developing its leaders; supporting training in units; developing doctrine; establishing standards; and building the future Army.

General Wallace has commanded at every level from platoon to Corps and on two separate occasions led Soldiers in combat. In 2003 as the V Corps Commander, General Wallace led 140,000 soldiers in the coalition attack to Baghdad in Operation Iraqi Freedom. In 1972, he served as a military advisor to the Vietnamese Army in Bac Lieu Province.

General Wallace's first assignment was as a platoon leader and a troop executive officer in the 6th Armored Cavalry Regiment at Fort Meade. After returning from his first combat tour, he commanded a tank company and held staff positions in the 82nd Airborne Division's light tank battalion.

He served a total of 9 years in the Federal Republic of Germany. During the Cold War with the 2nd Armored Cavalry Regiment he served in various staff assignments and as the Commander of the Regiment's 3rd Squadron. Following an assignment as the Senior Armor Trainer and Chief of Staff of the National Training Center (NTC) at Fort Irwin, California, General Wallace returned to Germany in 1992 to command the 11th Armored Cavalry Regiment in Fulda. He returned to Fort Irwin in 1994 as the Commander of the NTC's Operations Group and later became the Commander of the NTC.

In 1997, General Wallace took command of the Army's Experimental Force (EXFOR) and the 4th Infantry Division at Fort Hood, Texas. Following division command, he served as Commander, Joint Warfighting Center and Director, Joint Training J-7, in US Joint Forces Command. In 2001, General Wallace Returned to Germany to assume command of V Corps. Following Corps command, General Wallace commanded the Army's Combined Arms Center at Fort Leavenworth, Kansas.

General Wallace is a graduate of numerous military schools to include the Army's Command and Staff College and the Naval War College. His awards include the Defense Distinguished Service medal, the Distinguished Service Medal with two oak leaf clusters, the Legion of Merit with four oak leaf clusters, the Bronze Star, foreign awards from the Federal Republic of Germany, the Republic of Vietnam and the Republic of Korea, the Combat Infantryman's Badge, the parachutist Badge, and the Ranger Tab.

In 2018 General Wallace was named a Distinguished Graduate of the United States Military Academy. Later that same year he was inducted into the US Army's Fort Leavenworth Hall of Fame, and the US Army Armor School honored him by hanging his portrait in the halls of the school as an Armored Force leader of distinction.