

**SARASOTA MILITARY ACADEMY
BOARD OF DIRECTORS
Tuesday, November 18, 2025**

- Call to Order
- Pledge of Allegiance
- Approval of the Minutes -Tab 1
 - September 23, 2025
- Guests
 - Education Foundation: Ms. Jennifer Vigne, Anaya Walker, Diana Berris
 - SMA Radio Program: SMA-CPT John Geimer
 - Mr. David Black
- Head of School Report - -SMA Prep Tab 2
 - Faculty Representative
 - Athletic Director Report
- CEO/Head of School Report – SMA High Tab 3
 - COGNIA Accreditation Renewal Update
 - Phase I Complete
 - Phase II
 - Athletic Director Report
 - Faculty Representative
- SAI Report - Tab 4
- Treasurer’s Report - Tab 5
 - Monthly Financial Report
 - TSIA Plan Approval
- 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 MEETING MINUTES
23 SEPTEMBER 2025

Board of Director Members' Attendance

Present:

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

Absent: SMA-LTC Abby Williams, Assistant Head of High School; SMA-MAJ Charlie Carver, Athletic Director;
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 Caitlin West, Assistant Head of High School
SMA-LTC Bryan Burns, Assistant Head of Middle School (virtual)
MAJ (Ret) Russ Osterfeld, SAI
SMA-LTC Steve Kok, Director of Finance
SMA-MAJ Savannah Kalka, Assistant Director of Finance

Guests in Attendance: CW4 Wes Rinehart, AI; SMA-MAJ Michael Finley, Performing Arts Department Chair;
SMA-MAJ Marsha Umana-Reinig; SMA-CPT Esther Jaffee, HS Faculty Representative (virtual); Amber Martin,
PTCC President; Maria Urrestta, PTCC Treasurer; C/MAJ Sam Bonser; Cadet Sage Rogovin; Mr. Vincent
Tortora, Pellegrino, McFarland & Tortora, PA; Mr. Herb Jones (virtual); Mr. Bob Luger (virtual); 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.

Chair McElheny stated there are three amendments to the agenda including the approval of the workshop minutes, the withdrawal of the school improvement plan, and the alumni recognition after the Treasurer's Report.

COL Ben Knisely moved to approve the amendments to the agenda; Brig Gen Charles Shugg seconded the motion and the board unanimously approved.

Motion to Approve the 26 August 2025 Minutes:

Vice Chair Erica Gregory moved to approve the 26 August 2025 minutes; Mr. Carlos Moreira seconded the motion and the board unanimously approved.

Motion to Approve the 25 August 2025 Workshop Minutes:

Brig Gen Shugg moved to approve the 25 August 2025 workshop minutes; GEN W. Scott Wallace seconded the motion and the board unanimously approved.

SMA-COL Christina Bowman introduced cadet Sage Rogovin to the board who earned the A/P Honor of Distinction Award as a junior cadet for the number of A/P exams she had successfully taken with an average score of 3.5 and above. Sage shared her story of pursuing enrollment into the US Naval Academy to become a fighter pilot.

Chair McElheny introduced Mr. Vincent Tortora of Pellegrino, McFarland and Tortora, P.A. for the audit presentation. Mr. Tortora discussed a few changes, but stated a clean audit would be submitted once approved.

COL Knisely moved to approve the FY 2025 Audit; 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 one factor to cadet success is having families involved and on campus as often as possible, resulting in 80% of new cadets had families attend the epaulet ceremony. Dr. Korwin stated 25 cadets attended the leadership conference in Disney, and cadets were encouraged to attend the Honor Flight Welcome Home at Sarasota/Bradenton International Airport. She mentioned open enrollment beginning on October 1st and that 45% of classes have 25 students or more.

CEO/Head of High School: SMA-COL Christina Bowman provided a read-ahead report. She shared her appreciation with CSM Jack Phinney for building the relationship and growing the Honor Flight Program. SMA-COL Bowman stated the withdrawal of the 2025-26 school improvement plan is to continue revising and the need for approval of the out-of-field instructors on both campuses.

COL Knisely moved to approve the out-of-field instructors for both campuses; Mr. Ron Skipper seconded the motion and the board unanimously approved.

SMA-COL Bowman provided an update on the COGNIA accreditation and beginning phase two, which compiles of surveys from families and cadets. Chair McElheny complimented SMA-COL Bowman with the visit that

morning with district's Dr. Brandon Johnson with an extraordinary presentation given by the regimental staff. He stated that the district has services that can be provided to our cadets and faculty.

Athletics Report: SMA-COL Bowman stated that Athletic Director, SMA-MAJ Charlie Carver, is grateful for the donations and support to the athletic department.

MS Faculty Representative: SMA-MAJ Marsha Reinig-Umana provided a read-ahead report. She discussed the staff's positive comments with the healthcare benefits, collaboration and communication with the administration, creating a collegial atmosphere on campus, and core values presented during first period. SMA-MAJ Reinig-Umana mentioned a few areas of concerns such as the condition of the property, large class sizes, compensation package, and long term plans with both campuses. Chair McElheny responded the board would meet with the staff quarterly to answer any questions directly.

SAI Report: MAJ Russ Osterfeld provided a read-ahead report. He discussed the upcoming events for Color Guard, Drill and Raiders, with mention of the Military Ball in November. C/MAJ Sam Bonser stated that any donations to the military ball would be appreciated and to provide guest speaker recommendations if possible.

Treasurer's Report: SMA-LTC Steve Kok provided a read-ahead report. He discussed balance sheets for both campuses and FTE based on enrollment for both campuses. SMA-LTC Kok explained the increase in expenses for July including textbooks, Windows 11 update to all computers, and additional software update.

Leadership and Ethics Conference Committee: Ms. Michael Tollerton provided an update on the conference. She shared the flyer and introduction letter mailed to Sarasota County's public, private and charter high schools. Ms. Tollerton discussed a conversation with the Education Foundation and shared they were on board and excited about the conference initiative.

PTCC Report: Ms. Amber Martin provided a read-ahead report. She stated a successful book fair, PTCC presence at both open houses, and scheduled a meet and greet on 2 October, and starting a committee for Wreaths Across America to ensure success this year.

Chair Report: Chair McElheny discussed meeting with different firms and banks that produced options of school construction, leasing and purchasing.

Alumni Recognition: In an effort to share success stories of past SMA alumni, COL Knisely shared the story of past Regimental Commander, Vaeda Hammond.

Old Business: N/A

New Business: N/A

Public Comments: N/A

Board Comments: Ms. Tollerton stated she would send out a more clarified email on the Leadership and Ethics Conference. She inquired as to the status of adding a cadet to the board specifically, in which SMA-COL

Bowman replied that C/MAJ Sam Bonser would be attending every board meeting. Ms. Tollerton inquired as to whether the cadet has voting ability on the board, to which Chair McElheny recommended SMA-COL Bowman to work out the details.

The next board meeting will be on 14 October 2025 at 2:30pm at the High School campus.

The chair adjourned the meeting at 3:54pm.

Dr. Thomas McElheny, Chair

Date

COL Ben Knisely, Secretary

Date

Sarasota Military Academy Board of Directors

Brief Report: SMA Prep Academic and Behavioral Growth and Campus Updates

Prepared by: Dr. Cheryl Korwin

Date: November 18, 2025

Summary

SMA Prep continues to show strong and sustained growth in academic performance, student behavior, and school culture. These gains are the result of a team deeply committed to the belief that high expectations, consistent support, and meaningful relationships drive lasting student success.

Current enrollment stands at 385 cadets, and interest for next year remains high, with nearly 90 applications already submitted for the 2026–2027 school year.

Highlights and Key Notes

- **Academic and Behavioral Growth:**

Students continue to demonstrate higher levels of academic achievement and responsibility. Failing grades are rare, honor roll numbers continue to rise, and GPA averages remain strong across all grade levels. Behavior referrals have steadily declined, and attendance is more consistent than ever, reflecting a positive, disciplined learning environment.

- **Professional Learning and Leadership Development:**

On October 13, the Leader in Me Lighthouse Team participated in a full day of strategic training focused on integrating culture, leadership, and academics. During this session, the team developed detailed action plans designed to align student leadership opportunities with academic rigor and a supportive campus culture.

At the same time, other teachers engaged in literacy-based professional development through Thinking Maps, with a special emphasis on strategies to support our ESOL population. These efforts are enhancing instructional consistency and deepening student engagement across all classrooms.

- **Enrollment and Family Engagement:**

Our first enrollment meeting, held on October 15, was well attended by prospective families and provided an opportunity to showcase SMA Prep's mission, programs, and culture of excellence. Enrollment for the upcoming year opened at the beginning of October, and interest continues to grow steadily.

- **Upcoming Events:**

The SPIN (Student and Parent Information Night) event is scheduled for January 22. We warmly invite and encourage Board Members to attend, as it provides an excellent opportunity to connect with prospective families and share in SMA Prep's vision for leadership and learning.

Overall Reflection

The continued growth of SMA Prep reflects a powerful combination of academic rigor, intentional leadership, and a nurturing environment that puts relationships at the forefront. Teachers, staff, and leadership teams remain united in the mission to help every cadet thrive—academically, socially, and personally.

SMA Prep □ Faculty Report

To: Sarasota Military Academy Board of Directors

From: SMA–MAJ Marsha Reinig-Umana, SMA Prep Liaison / ESE Instructional Facilitator

Subject: Faculty Report

Meeting Date: November 18, 2025

Executive Highlights □

□ Strong Leadership:

Dr. Korwin's vision continues to drive **academic, leadership, and cultural growth**. The **Leader in Me** program—based on **Stephen Covey's principles** and **David Allen's Getting Things Done**—is now fully integrated into **first-period classes**, reinforcing SMA's **core values** and empowering cadets to excel.

□ Proactive Administration:

Dr. Korwin and SMA–LTC Burns demonstrate **hands-on, visible leadership** through strong **family communication, teacher collaboration**, and a **unified campus culture** that has strengthened **behavior systems** and **student engagement**.

□ Military & Community Connections:

Cadets proudly represented SMA at the **UTC Christmas Parade**, leading the procession with professionalism alongside **Dr. Korwin, SMA–CPT Edwards, and SMA–MAJ Umana**. The leadership team's participation helped highlight cadet pride and community connection. Parade announcers commended SMA for exemplifying **discipline, core values, and leadership excellence**.

□ Community & Innovation:

SMA Prep expanded **community partnerships** through participation in the **Veterans Day Parade, Middle School Fairs, Wreaths Across America**, and the upcoming **Student Art Exhibition (Dec. 5, Island Art Gallery, Bradenton)**—highlighting cadet **creativity, leadership, and civic engagement**.

□ Cadet Spotlight:

At a **Civic Path Author Event**, **Cadet Bonzer**, an SMA Prep alumnus, earned spontaneous applause for his thoughtful question on **youth civic engagement**—a clear example of the **lasting impact** of an **SMA education** and leadership development.

I. Purpose □

On behalf of the **SMA Prep faculty**, thank you for your **ongoing leadership and support**. This report summarizes **key faculty highlights** and **initiatives** reflecting SMA's mission of **academic excellence, character, and service**.

II. Accolades □

□ STEM & Innovation

- **STEM Club:** Students built **functional walkie-talkies**, demonstrating applied **science and communication skills** during **Open House**.
- **HAM Radio Initiative:** Our **8th Grade Science teacher** earned her **HAM Radio License** and is launching the **Prep Campus HAM Station**, connecting **classroom science** to **real-world communication**.

- **Grant Submissions:** Funding proposals include **GeoChron Digital Pro 4K** and the **Student Rocket Launch Program** to enhance **STEM integration** and **hands-on experimentation**.
- **Curriculum Integration:** Projects align with **NGSS Standards**, emphasizing **waves, energy, and data applications** across science classes.

□ **Athletics & Wellness**

- **Volleyball:** Successful season with **strong student and parent support**.
- **Golf:** Team finished strong with a **3rd-place performance** by **Hudson Murray**.
- **Boys Basketball:** Earned **first win in three years**, featuring a **buzzer-beater** by **Richard Aguilar**.
- **Cross Country:** Hosted a **home meet** through a **partnership with Bethel Church**.
- **Pickleball Club:** Launching **2nd semester** with a goal to form a **competitive team** next year.
- **Weight Lifting Club:** Growing participation, emphasizing **strength, discipline, safety, and leadership** while promoting **lifelong fitness habits**.

□ **Student Leadership & Wellness (SWAT):**

Now part of **Superintendent Connor’s Vaping Task Force**, SWAT members are leading **community awareness events** and creating an **on-campus art project** honoring lives lost to **tobacco-related illness**—amplifying **student voice and advocacy**.

□ **Gaming Club:**

Expanding **teamwork** and **strategic thinking** through tabletop and strategy games like **Magic: The Gathering** and **Warhammer 40K**. **Club spirit shirts** debut before the holidays

IV. Invitation □

You’re invited to the **SMA Prep Student Art Exhibition** on **December 5** at the **Island Art Gallery (Downtown Bradenton)**—a celebration of **cadet creativity** and **community engagement**.

V. Conclusion ☑

The **SMA Prep faculty** remains steadfast in its **commitment to excellence, leadership, and community partnership**. With measurable success across **STEM, athletics, wellness, and civic engagement**, SMA Prep continues to embody its mission of developing **confident, capable, and compassionate leaders**. We look forward to continued collaboration with the **Board** as we build upon this momentum and shape a **bright future** for SMA Prep.

High School Head of School
CEO Report
November 18, 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.

2025-2026 Approvals:

- Teacher Salary Increase Allocation Plan

COGNIA Accreditation:

- Phase I Complete and Approved
- Phase II
 - Staff, Student and Parent Surveys with Analysis
 - Learning Environment Observations
 - Stakeholder Feedback Survey and Analysis
 - Student Performance Analysis
 - Draft Due: December 17, 2025

Strategic Plan Goals:

- **Resources:**
 - 2026-2027 Enrollment Projection
 - Provided
 - Mussman Architects
 - Meeting Scheduled for November 17, 2025 Postponed
 - New Date TBD
 - SMA High must complete approximately eight hours of background work prior to the meeting. The exercise will prove to be helpful but ample time is needed in order to complete the work to include administration and staff members. Tentative date for completion of the exercise is January 5, 2025, a professional development day.

- **College, Careers, and Citizenship**
 - Education Foundation Impact Report
 - Report Provided
 - Cadet Placed First in the Congressional Debate Competition
 - Letter Provided

- **Character and Leadership Development**
 - Veterans Day Parade
 - Cadets and Staff Marched Proudly and Met SMA Expectations
 - Bradenton Kiwanis Letter Commending SMA JROTC Honor Guard
 - Letter Provided
 - SMA High School Teacher of the Year
 - Dr. Cecilia Ferradino
 - Medal of Honor Training
 - August 3, 2025
 - Implementation for the 2026-2027 School Year

Communication/Community Outreach:

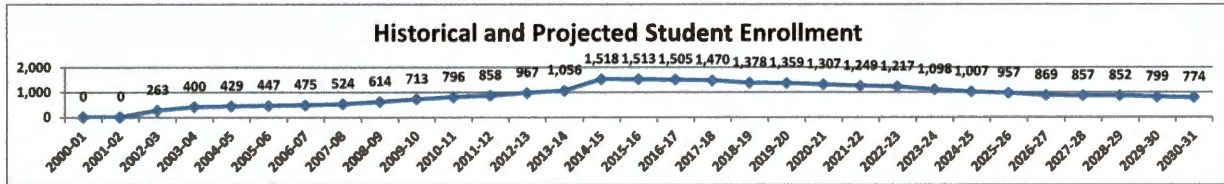
- High School Admissions Tour
 - November 19, 2025 7:00am
- Military Ball
 - November 20, 2025 5:30pm-10:00pm
 - Lakewood Ranch Country Club
- High School Show Choir Musical
 - December 15, 2025 6:00pm
- High School Winter Concert
 - December 16, 2025 6:00pm
- Next Meeting: December 16, 2025 2:30 pm High School Campus

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	57.92%
School Web Site:	sarasotamilitaryacademy.com	Title One School	No

Student Enrollment by Grade Level										
Grade Level	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027	2027-2028	2028-2029	2029-2030	2030-2031
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	177	197	158	124	124	109	109	109	109	109
Seventh	184	196	175	152	126	117	109	109	109	109
Eighth	207	177	158	168	138	112	117	109	109	109
Ninth	182	191	167	142	178	134	112	117	109	109
Tenth	173	172	171	151	133	162	134	112	117	109
Eleventh	171	138	147	141	138	115	162	134	112	117
Twelfth	155	146	122	129	120	120	115	162	134	112
Total by Grade	1,249	1,217	1,098	1,007	957	869	857	852	799	774
Students by Program funded through the Florida Education Finance Program										
Basic Education	940	894	816	675	641	582	575	571	535	519
E.S.O.L.	32	31	39	82	77	70	69	69	65	63
Students with Disabilities k-3	0	0	0	0	0	0	0	0	0	0
Students with Disabilities 4-8	98	111	77	87	83	75	74	74	69	67
Students with Disabilities 9-12	126	118	100	88	83	76	75	74	70	67
ESE Level 4	0	0	0	0	0	0	0	0	0	0
ESE Level 5	0	0	0	1	1	0	0	0	0	0
Career Education	14	28	35	31	30	27	27	26	25	24
Total Students by Program	1,210	1,182	1,066	963	915	830	820	814	764	740



Principal's Certification

"I have reviewed the above student enrollment projection for the school year 2026-2027"

Signature and Date Christine Bowman

I am in agreement with the 2026-2027 projection Circle One Yes No



EDUCATION
FOUNDATION
OF SARASOTA COUNTY



GET READY.
GO FURTHER.

IMPACT REPORT 2024-2025

PREPARED EXCLUSIVELY FOR:
SARASOTA MILITARY ACADEMY

GET READY. GO FURTHER.

At **Sarasota Military Academy (SMA)**, senior year is a pivotal moment. For many students, it's not just about applying to college, it's about seeing a future as possible and attainable. Through our continued partnership last year, students received one-on-one, in-person coaching throughout the school year. Our Student Success Coaches provided personalized guidance to navigate postsecondary pathways, including college, military enlistment, or workforce entry. This work went beyond forms and applications; together, we walked alongside students as they made some of the biggest decisions of their lives and mapped out their next steps.



Coaching Focus Areas

- Scholarship navigation and application support
- FAFSA and financial aid guidance
- Resume and job readiness coaching
- Postsecondary planning and military enlistment preparation

Formal Events and Workshops

- State College of Florida and University of South Florida admissions presentations
- FAFSA Open House
- Career chats with Sarasota Memorial Hospital
- CommonApp and college essay workshops

STUDENT OUTCOMES

TOTAL SENIORS SERVED

92%

113 out of 123 seniors received personalized coaching.

POSTSECONDARY EDUCATION

77%

95 students, secured a college, trade school, or technical program plan.

MILITARY ENLISTMENT

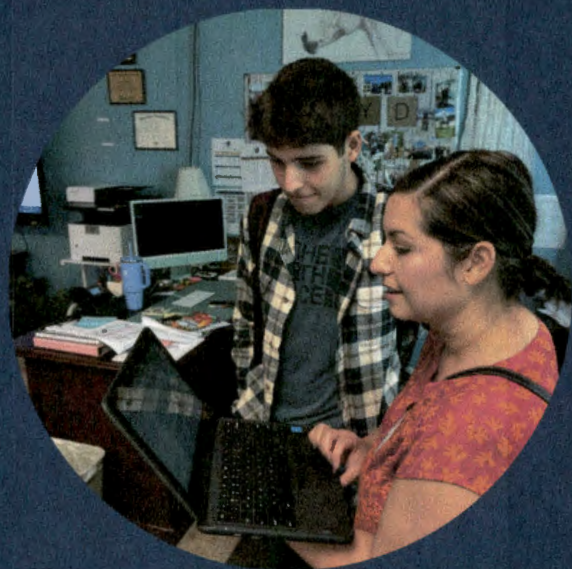
15%

18 students, enlisted with full support and understanding of benefits and pathways.

COACHING SESSIONS

98%

of all sessions were conducted in-person, allowing students to engage in real-time conversations about their goals, challenges, and next steps.



IMPACT HIGHLIGHTS

With the support of our Student Success Coaches, one senior preparing to attend Embry-Riddle Aeronautical University came into the program feeling overwhelmed by the prospect of balancing five college classes and a lab. Through personalized coaching, he developed a time management strategy tailored to his rigorous schedule, secured housing, and successfully completed a scholarship interview—laying the foundation for a strong start to his college career.

Another senior, who was working full-time and initially unsure how to continue his education, engaged with a coach to explore his options. With guidance, he enrolled at State College of Florida while continuing to work, and together they built a long-term transfer plan to Florida A&M University. The coaching helped him see his current employment as a stepping stone rather than a limitation, giving him both immediate direction and a vision for his future.

Our Student Success Coaches also provided support to underclassmen throughout the year to help them envision and plan for their futures by beginning to build habits and skills necessary to succeed in high school and beyond: self-advocacy, decision-making, and resilience.

Through our partnership, where the SMA's insights and resources work hand-in-hand with our personalized coaching, students at SMA have been empowered to take ownership of their futures.

THANK YOU!

Let's Get Future-Ready!



JOIN THE FUTURE-READY SCHOLARS PROGRAM TODAY!

Are you a Sarasota County high school student thinking about life after graduation? Future-Ready Scholars Program helps you explore your goals and build a plan for college, career, or both with real-world support, mentoring, and resources.

Who should join:

- Motivated high school students attending Sarasota County Schools.
- Students seeking personalized guidance with creating a plan for life after high school - this could include college, a career, or even the military!

What you'll gain:

- Free college tours and career excursions
- One-on-one support from coaches with college and job applications.
- Connect with peers through monthly workshops and events.
- Access to SAT/ACT prep, Resume Writing, Financial Literacy, and more.
- Opportunity to earn scholarships.

Apply now!

<https://shorturl.at/BeGtY>



Want to learn more about what we offer?

Get in touch at coaching@edfoundationsrq.org to learn more and get Future-Ready!

Visit our website: edfoundationsrq.org



W. GREGORY STEUBE
17TH DISTRICT, FLORIDA



HOUSE COMMITTEE
ON WAYS AND MEANS

HOUSE PERMANENT SELECT
COMMITTEE ON INTELLIGENCE

WASHINGTON OFFICE
2457 RAYBURN HOUSE OFFICE BUILDING
WASHINGTON, DC 20515
(202) 225-5792

Congress of the United States
House of Representatives
Washington, DC 20515-0917

October 10, 2025

Dr. Cecilia Ferradino
801 N Orange Ave
Sarasota, FL 34236-4116

Dear Dr. Ferradino,

Congratulations on being named the Teacher of the Year by the Sarasota Military Academy. This is a true testament to your leadership, hard work and dedication to the community. Thank you for all you have done.

Once again, please accept my most sincere congratulations on being recognized as the Teacher of the Year. If I may be of any assistance, please do not hesitate to contact my Congressional office at (941) 499-3214. God Bless.

For Freedom!

A large, stylized handwritten signature in blue ink, appearing to read 'W. Gregory Steube'. The signature is written over the typed name and title.

W. Gregory Steube
Member of Congress

Paid for by official funds authorized by the House of Representatives.

PUNTA GORDA OFFICE
226 TAYLOR ST.
SUITE 230
PUNTA GORDA, FL 33950
(941) 499-3214

SARASOTA OFFICE
7590 FRUITVILLE RD.
SUITE 102
SARASOTA, FL 34240
(941) 499-3214
STEUBE.HOUSE.GOV

VENICE OFFICE
401 WEST VENICE AVE.
SUITE 157
VENICE, FL 34285
(941) 499-3214

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W. GREGORY STEUBE
17TH DISTRICT, FLORIDA



HOUSE COMMITTEE
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HOUSE PERMANENT SELECT
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WASHINGTON OFFICE
2457 RAYBURN HOUSE OFFICE BUILDING
WASHINGTON, DC 20515
(202) 225-5792

Congress of the United States
House of Representatives
Washington, DC 20515-0917

October 10, 2025

Leah Trotter
801 N Orange Ave
Sarasota, FL 34236-4116

Dear Leah,

Congratulations on placing first in Congressional Debate at a debate competition at Strawberry Crest High School. This is an outstanding accomplishment that speaks to your hard work and dedication. I look forward to following your continued success in the future.

Once again, please accept my most sincere congratulations on placing first in Congressional Debate. If I may be of any assistance, please do not hesitate to contact my Congressional office at (941) 499-3214. God Bless.

For Freedom!

W. Gregory Steube
Member of Congress

Paid for by official funds authorized by the House of Representatives.

PUNTA GORDA OFFICE
226 TAYLOR ST.
SUITE 230
PUNTA GORDA, FL 33950
(941) 499-3214

SARASOTA OFFICE
7590 FRUITVILLE RD.
SUITE 102
SARASOTA, FL 34240
(941) 499-3214
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VENICE OFFICE
401 WEST VENICE AVE.
SUITE 157
VENICE, FL 34285
(941) 499-3214

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Bradenton Kiwanis®



Please Reply To 3602 29th Avenue W, Bradenton, FL 34205-2014. Call 941-224-1030

6 November 2025

Col. Christina Bowman
Sarasota Military Academy
801 N Orange Ave
Sarasota FL 34236

Dear Col. Bowman:

On behalf of President Dr. Jon Mullis and the Board of the Bradenton Kiwanis Club, and the Veterans Committee, we want to thank you and Sarasota Military Academy for coming to our rescue at the last minute when USF ROTC Honor Guard was unable to present the Colors for our Annual Veterans Appreciation Luncheon.

SGM Kenneth Lee and his four JROTC members did an excellent job as they presented the colors in excellent fashion, with great execution of this important honor. We were happy that they arrived early so that they could see the lay out they had to work with, practice their procedures, and even get a bite to eat, thanks to Mission BBQ.

We are always happy to see your fine young people doing exceptional work at Sarasota National Cemetery for many events, and it makes me proud to see these young people supporting these events.

Thank you once again, and we wish you and Sarasota Military Academy continued success as you build young people to be great and successful American citizens.

With Best Regards,

A handwritten signature in black ink, appearing to read 'E. Cleveland'.

EDWARD A CLEVELAND, EFO
Fire Chief (Retired)
US Air Force SSgt (Veteran)
Veterans Committee Co-Chair

SARASOTA MILITARY ACADEMY

Senior Army Instructor
801 North Orange Avenue
Sarasota, Florida 34236

18 November 2025

MEMORANDUM FOR GOVERNING BOARD, SARASOTA MILITARY

ACADEMY THRU: Superintendent Sarasota Military Academy

SUBJECT: Significant Activities Report (SAR)

Significant Activities (NOV 2025):

- **1 NOV 2025: Raiders:** Area 5 Raider Meet (Bayside Church, Bradenton, FL)
- **4 NOV 2025: Color Guard:** Veterans Appreciation Luncheon (Manatee Performing Arts Center)
- **9 NOV 2025: Color Guard:** Tribute to Heroes Parade (Lakewood Ranch, FL)
- **11 NOV 2025: JROTC** Sarasota County Veterans Day Parade (Sarasota, FL)
- **14 NOV 2025: Color Guard** Armed Forces Cup Golf Tournament (Sarasota, FL)
- **15 NOV 2025: Color Guard:** Pines of Sarasota Veterans Day Parade (Sarasota, FL)
- **15 NOV 2025: Raiders:** State Raider Meet (Brooksville, FL)
- **20 NOV 2025: JROTC SMA** Military Ball (Lakewood Ranch Golf & Country Club)

Significant Activities (DEC 2025):

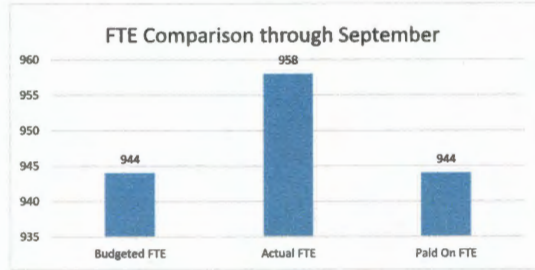
- **6 DEC 2025: Color Guard:** Sarasota Holiday Parade (Sarasota, FL)
- **13 DEC 2025: Color Guard:** Orange Bowl Basketball Tournament (Miami, FL)

SAI Summary and Outlook:

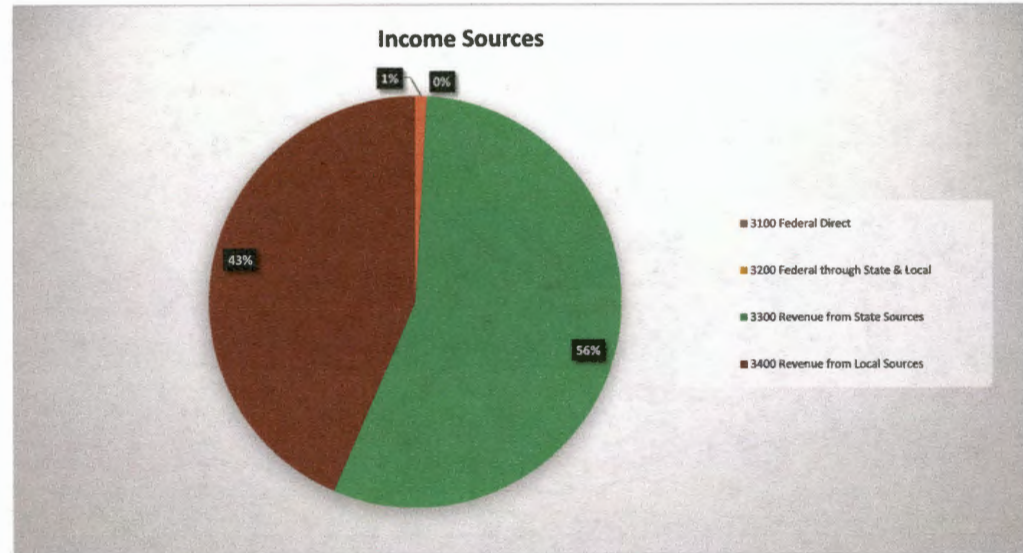
• **Summary:** SMA JROTC Department wraps up November with a successfully executed Veterans Day Parade, multiple Color Guard events and competition at the Florida State Raider Meet in Brooksville. We are also hosting our Annual SMA Military Ball held at Lakewood Ranch Country Club on 20 NOV 2025. Wishing you all a wonderful Thanksgiving and start to the Holiday Season.

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

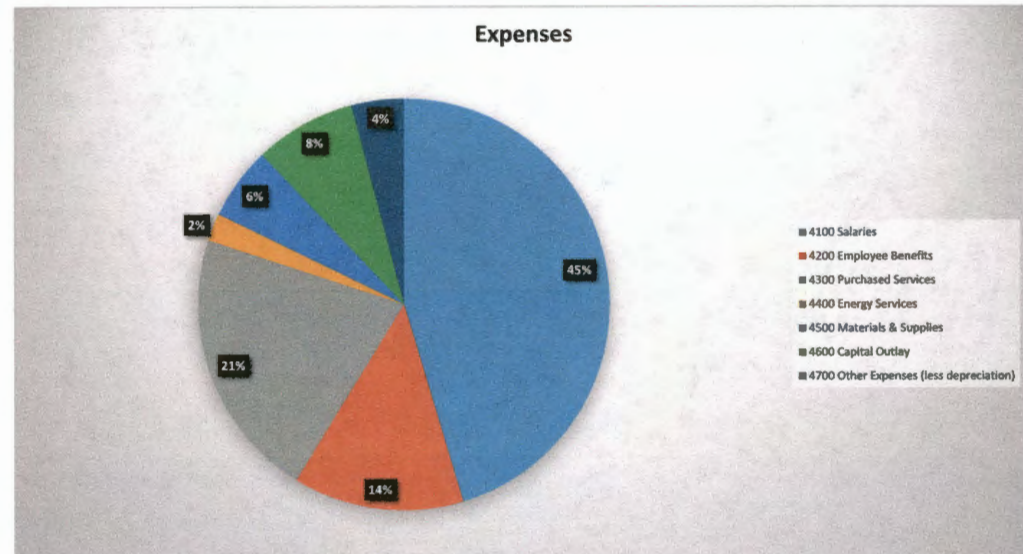
Profit and Loss Pie Charts through September 2025



Income		
3100 Federal Direct	\$	30,082
3200 Federal through State & Local	\$	-
3300 Revenue from State Sources	\$	1,814,161
3400 Revenue from Local Sources	\$	1,420,817
Total Revenue		\$3,265,060



Expenses		
4100 Salaries	\$1,438,840	
4200 Employee Benefits	\$424,098	
4300 Purchased Services	\$675,940	
4400 Energy Services	\$68,374	
4500 Materials & Supplies	\$181,974	
4600 Capital Outlay	\$251,545	
4700 Other Expenses (less depreciation)	\$130,731	
Total Operating Expenses	\$3,171,502	
Net Operating Income	\$93,558	
Depreciation Expense	\$175,782	
Net Income	-\$82,224	



Salaries & Benefits Equal 59 % of Operating Budget

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

	Total
ASSETS	
Current Assets	
Bank Accounts	
1110 Cash and cash equivalents	1,647,989
8-1111 Sport Team Bank Accounts	32,010
Total Bank Accounts	\$ 1,679,999
Other Current Assets	
1130 Accounts Receivable	8,659
1210 Deposits	50,846
1220 Due from Other Governments	531,737
Total Other Current Assets	\$ 591,241
Total Current Assets	\$ 2,271,241
Total Fixed Assets	\$ 18,359,906
TOTAL ASSETS	\$ 20,631,147
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Total Accounts Payable	\$ 96,954
Total Credit Cards	\$ 76,589
Total Other Current Liabilities	\$ 1,434,768
Total Current Liabilities	\$ 1,608,311
Total Long-Term Liabilities	\$ 8,154,045
Total Liabilities	\$ 9,762,356
Equity	
3010 Invested In Capital Assets, Net	8,812,050
3020 Temporarily Restricted Net Assets	70,304
3030 Unrestricted Net Assets	2,068,662
Net Income	(82,225)
Total Equity	\$ 10,868,791
TOTAL LIABILITIES AND EQUITY	\$ 20,631,147

Thursday, Nov 06, 2025 05:32:49 AM GMT-8 - Accrual Basis

\$2,271,241 - \$1,608,311 = \$662,930 Working Capital

Ratio of Assets to Liabilities = \$2,271,241 / \$1,608,311 = 1.41

Sarasota Military Academy

Budget vs. Actuals: FY26 Budget - FY26 P&L

July - September, 2025

3 Months in should be at 25%

	TOTAL		
	ACTUAL	BUDGET	% OF BUDGET
Income			
3100 Federal Direct	30,082	210,080	14.00 %
3200 Federal Through State & Local		6,980	
3300 Revenue from State Sources	1,814,161	7,167,048	25.00 %
3400 Revenue from Local Sources	1,420,817	5,896,069	24.00 %
Total Income	\$3,265,060	\$13,280,177	25.00 %
GROSS PROFIT	\$3,265,060	\$13,280,177	25.00 %
Expenses			
4100 Salaries	1,438,840	5,937,623	24.00 %
4200 Employee Benefits	424,098	2,104,544	20.00 %
4300 Purchased Services	675,940	2,018,404	33.00 %
4400 Energy Services	68,374	244,590	28.00 %
4500 Materials & Supplies	181,974	360,572	50.00 %
4600 Capital Outlay	251,545	337,854	74.00 %
4700 Other Expenses	306,513	1,328,302	23.00 %
Total Expenses	\$3,347,284	\$12,331,889	27.00 %
NET OPERATING INCOME	\$-82,225	\$948,288	-9.00 %
NET INCOME	\$-82,225	\$948,288	-9.00 %

We decided, for internal reporting only, to allocate the anticipated millage revenue evenly over each month until it is received in January because we are fronting a number of capital projects right now.

We anticipate receiving \$1,078,937 at the end of January (67% of our total millage for the year). Split over 7 months (July-Jan) would be \$154,133 per month in receivables.

Sarasota Military Academy

Profit and Loss - YTD - By Campus

July - September, 2025

	HS	PREP	TOTAL
Income			
3100 Federal Direct	30,082		\$30,082
3300 Revenue from State Sources	1,072,504	741,657	\$1,814,161
3400 Revenue from Local Sources	886,626	534,191	\$1,420,817
Total Income	\$1,989,212	\$1,275,848	\$3,265,060
GROSS PROFIT	\$1,989,212	\$1,275,848	\$3,265,060
Expenses			
4100 Salaries	857,410	581,429	\$1,438,840
4200 Employee Benefits	238,235	185,863	\$424,098
4300 Purchased Services	382,631	293,309	\$675,940
4400 Energy Services	30,201	38,173	\$68,374
4500 Materials & Supplies	119,432	62,542	\$181,974
4600 Capital Outlay	155,923	95,622	\$251,545
4700 Other Expenses	202,496	104,017	\$306,513
Total Expenses	\$1,986,328	\$1,360,957	\$3,347,284
NET OPERATING INCOME	\$2,884	\$ (85,109)	\$ (82,225)
NET INCOME	\$2,884	\$ (85,109)	\$ (82,225)

**2025-26 SALARY INCREASE ALLOCATION
CHARTER DISTRIBUTION PLAN TEMPLATE
DUE OCTOBER 1, 2025**

Instructions: Use this template only if you are submitting a plan for a charter school. School districts should use the district-specific template. Complete the following sections in order, then review the error report at the end of the survey. DO NOT modify this template. Enter data as directed, as any modification will result in the need for a resubmission.

Boxes with this color indicate that data should be entered. Do not modify other cells.

Sponsoring District Name (From the Charter Plan Tab)	Sarasota
Charter School Number	74
Charter School Name	ota Military Academy, Inc.

SECTION A - Allocation Data

A1	Charter proportionate share of the Maintenance Allocation (do not include charter school funds).	\$341,739
A2	Charter proportionate share of the Growth Allocation (do not include charter school funds).	\$27,667
A3	Charter proportionate share of the Salary Increase Allocation from 2025-26 FEFP Conference Calculation.	\$369,406

SECTION B - Maintenance Allocation: Used to maintain the salary increases provided through the Salary Increase Allocation in previous fiscal years. If the cost to maintain these increases is greater than the charter's Maintenance Allocation, other funding sources must be used to cover this difference. If the cost to maintain these increases is less than the charter's Maintenance Allocation, the remaining funds will be combined with the charter's Growth Allocation. See FAQs Q1 through Q4.

B1	Funds available for the maintenance of prior year Salary Increase Allocation increases.	\$341,739
B2	Total cost to maintain the salary increases provided through the Salary Increase Allocation in previous years (enter the total cost here, even if it exceeds the allocation).	\$373,167

B3	Funds remaining from the charters's share of the 2025-26 Maintenance Allocation.	\$0
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SECTION C - Growth Allocation: Provided for increased personnel compensation costs or to provide salary increases to full-time classroom teachers and certified prekindergarten teachers funded in the Florida Education Finance Program with at least two years of full-time teaching experience in a Florida public school and/or other instructional personnel defined in s. 1012.01(2)(a)-(d), F.S. See FAQs Q5 through Q9.

c1	Funds available from the growth allocation and remaining maintenance allocation (A2+B3).	\$27,667
Increased Personnel Compensation Cost		
c2	Total planned expenditures of <u>Salary Increase Allocation funds</u> used for increased employer retirement contribution.	\$21,866
c3	Total planned expenditures of <u>Salary Increase Allocation funds</u> used for increased health insurance costs.	\$0
c4	Total planned expenditures of <u>Salary Increase Allocation funds</u> used for other increased compensation costs.	\$5,801
c5	Total planned expenditures of <u>Salary Increase Allocation funds</u> used for increased compensation costs.	\$27,667
Minimum Base Salary Figures		
c6	Minimum base salary for teachers as defined in s. 1012.01(2)(a), F.S., including certified prekindergarten teachers funded in the FEEP, prior to any salary increases provided in the 2025-26 year.	\$50,250
c7	Adjusted minimum base salary for 2025-26 for full-time classroom teachers as defined in s. 1012.01 (2)(a), F.S., after implementation of the Salary Increase Allocation and any additional funding sources used.	\$50,250
c8	Increase in the minimum base salary, if any, as a result of the Salary Increase Allocation (Item C7 minus Item C6) and any additional fund sources.	\$0
Minimum Base Salary Expenditures		
c9	Total planned expenditure of funds from the Salary Increase Allocation , if any, used to increase salaries for full-time classroom teachers (with at least two years of full-time teaching experience in a Florida public school) to the minimum base salary listed in item C7.	\$0

c10	Total planned expenditure of funds from sources other than the Salary Increase Allocation, if any, used to increase salaries for full-time classroom teachers to the minimum base salary listed in item C7.	\$0
General Salary Increases		
c11	Total planned expenditure of Salary Increase Allocation funds used to provide salary increases to full-time classroom teachers with at least two years of full-time teaching experience in a Florida public school.	\$0
c12	Total planned expenditure of Salary Increase Allocation funds used to provide salary increases to increase full-time instructional personnel as defined by s. 1012.01(2)(b)-(d), F.S.	\$0
c13	Total dollar amount of unused funds (Item C1 minus Item C4, C9, C11 and C12). This cell should be zero.	\$0

Section D - Error Report: <i>The following items will indicate whether there is an error with the data entered on the report or if some data should be verified for accuracy. Do not submit this report unless item D3 in this section is marked YES.</i>		
D1	Data entered in all fields (if "No," verify that all orange boxes contain data, even if 0).	Yes
D2	The minimum base salary is greater than or equal to the previous year (if "No," please correct, as the minimum base cannot be lower than what was the previous amount).	Yes
D3	If the minimum base salary does not have an increase, there should be no cost under "Minimum Base Salary Expenditures."	Yes
D4	C9 equals zero.	Yes
D3	2025-26 Salary Increase Allocation Distribution Plan ready to submit?	Yes



DAVID W. BLACK

PROFESSIONAL SUMMARY OF LEGAL & CORPORATE EXPERIENCE:

David Black is the owner and CEO of Bella Luna Investments, Inc. a private real estate investment firm focused on large multifamily projects in Florida and Texas.

David has over 40 years of investment and private legal practice and corporate general counsel experience, including 10 years as General Counsel, Corporate Secretary and Chief Compliance Officer of two Fortune 500 global NYSE and NASDAQ companies (Affiliated Computer Services (ACS), and BearingPoint, formerly known as KPMG Consulting).

He is a proven General Counsel and Corporate Secretary of private and public companies from start-up to multi-billion dollars in sales, with general legal & cross functional administrative and operational leadership expertise (e.g., corporate facilities, corporate security, risk management and insurance procurement, and corporate philanthropic foundations) globally across multiple industries.

He led the 2nd largest IPO in the history of NASDAQ at that time (\$2.3 Billion), multiple public and private secondary debt and equity offerings, and more than 150 mergers and acquisitions globally.

David has provided counsel to companies across various industries and sectors, including information technology outsourcing and business process outsourcing, software licensing and development, hardware leasing, commercial banking and lending, manufacturing, distribution, retail, wholesale, telecommunications, cable television, health care, real estate investment and development and financing.

With substantial experience in successfully addressing legal challenges facing the banking and banking technology industries, David testified before the U.S. Senate Committee on Banking, Housing & Urban Affairs in Washington, D.C., along with other prominent leaders from the banking industry and the ATM industry. The inquiry, covered and broadcast on CSPAN, related to proposed Federal regulation of the banking industry and ATM providers and ATM fees.

David was appointed by Florida Governor Ron Desantis to the Board of Directors of Florida Foundation For Correctional Excellence, where he served from September 2021 through September 2024.

He is a widely published author and speaker on business and legal topics.

David's experience includes Corporate Governance & Compliance; Corporate Finance & Securities Transactions; Corporate Secretary; Mergers & Acquisitions; VC & Private Equity; Joint Ventures; Strategic Alliances; Technology Outsourcing & BPO; Technology Licensing and Transfers; Commercial Real Estate; Litigation, Arbitration and Mediation Management; Risk Management; Employment Relations; Stock Option Plans; Intellectual Property Portfolio; and Legislative Affairs.

PROFESSIONAL EXPERIENCE

BELLA LUNA INVESTMENTS, INC

2006-Current

Owner, President and CEO

Private investment firm focused on large multifamily projects in Florida and Texas.

GREENBERG TRAURIG, LLP

2017-2019

Partner / Shareholder

Corporate partner in one of the largest global business law firms in the world, representing national and international clients in corporate and commercial real estate transactions.

CARRINGTON & COLEMAN, LLC

2016-2017

Partner

Corporate partner with a national and international Fortune 500 and Family Office practice.

BEARINGPOINT, INC. (formerly KPMG CONSULTING, INC.)

2000-2006

Executive Vice President, General Counsel, Corporate Secretary, Chief Compliance Officer & Managing Director With Responsibility for over 150 Operational Facilities

BearingPoint was a Fortune 500, NYSE listed, and one of the world's largest management consulting, systems integration, professional staffing, business process outsourcing (BPO) and managed services firms, serving global and national businesses and government agencies, with annual sales exceeding \$3.5 billion and 18,000 employees globally.

AFFILIATED COMPUTER SERVICES, INC. ("ACS")

1995-2000

EVP, General Counsel, Corporate Secretary & Member of Board Directors

ACS was a Fortune 500 company (formerly NYSE listed), with annual sales exceeding \$3 billion and 36,000 employees globally. ACS, acquired by Xerox in 2010, provides a full range of information technology services.

GEARY, GLAST AND MIDDLETON, P.C.

1986-1995

Partner 1991-1995; Associate 1986-1991

Dallas based regional law firm with a national client base, with over 120 attorneys (at that time, one of the largest Texas firms).