

**SARASOTA MILITARY ACADEMY
BOARD OF DIRECTORS
Tuesday
August 25, 2026**

- Call to Order
- Pledge of Allegiance
- Approval of the Minutes -Tab 1
 - June 23, 2026
- Introduction of Visitors
 - SMA-CPT John Geimer
- Head of School Report - -SMA Prep Tab 2
 - Faculty Representative
 - Athletic Director Report
- CEO/Head of School Report – SMA High Tab 3
 - Athletic Director Report
 - Faculty Representative
- SAI Report - Tab 4
- Treasurer’s Report - Tab 5
 - Monthly Financial Report
- Committee Report – Tab 6
 - Strategic Planning Committee
 - 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

23 JUNE 2026

Board of Director Members' Attendance

Present:

Dr. Thomas J. McElheny, Former Capt, USMC, Chair
Ben Knisely, COL, USA (Ret), Secretary
Pete Skokos, Treasurer
David Black
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
W. Scott Wallace, GEN, USA (Ret)

Absent: Erica Gregory, Lt Col, USAF (Ret), Vice Chair; MAJ (Ret) Russ Osterfeld, SAI; SMA-CPT Jared Lauther, MS Athletic Director

SMA Administrative Staff in Attendance:

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

Guests in Attendance: SMA-CPT Mick Fallis, HS Athletic Director; SMA-MAJ Marsha Reinig-Umana, MS Faculty Representative; SMA-MAJ Dawn Sudbury, MS Department Chair; SMA-CPT Kathy Simon, MS Office Manager (virtual); Fred Starling, The Starling Group; Chris Verville, The Starling Group; David Perry, Michael Saunders and Company; Simon Bacon, Michael Saunders and Company; Emmalee Legler, Jon Swift Construction (virtual); Jason, Jon Swift Construction (virtual); Adam Barker, OSports (virtual); Tristan Hermanson, Entech US (virtual); Samuel Bonser; Nikki Orth (virtual)

Location: SMA High School

The chair called the meeting to order at 2:29 pm.

Chair Thomas McElheny started the Pledge of Allegiance.

Chair McElheny requested to amend the agenda with a presentation and consolidation blueprint by Mr. Fred Starling of The Starling Group to present first. He also addressed other priorities of the board to

move forward with the consolidation, the sale of the high school campus, and securing Michael Saunders and Company as the listing realtor.

Mr. Starling and Mr. Chris Verville presented to the board the three buildout options of the SMA Prep Middle School campus, explaining in detail the new athletic field, additional parking, and the plan for the storm water drainage. Mr. Starling discussed zoning with the county, traffic study, wetlands, and the needed next steps to ensure remaining on schedule. He further discussed the breakdown of the proposed budget.

Chair McElheny introduced Mr. David Perry and Mr. Simon Bacon of Michael Saunders and Company to discuss the plans on listing the high school campus. Mr. David Black explained the process of interviewing multiple firms to manage the sale of the high school campus. Mr. Perry shared the extensive research and time his team has put forth to provide potential buyers the many options the property can become.

Mr. Black mentioned his successful meeting with the team lead, Mr. Lee DeLieto, and stated he is comfortable in the recommendation of this team for the sale of the property. BG Jerry Neff inquired as to their thoughts on sale with a leaseback, to which Mr. Perry replied that it would be part of the negotiations as it could take anywhere from 18-24 months for permits. Mr. Bacon stated a developer can borrow zoning within one mile and the potential of this property can be eighteen stories of protected views to the bay, including 40% affordable housing. Chair McElheny commended Mr. Black in steering this initiative, utilizing his extensive expertise.

Chair McElheny introduced Ms. Emmalee Legler and her team from Jon Swift Construction to discuss options for the athletic field, along with bleachers, turf and lights. Ms. Legler explained that although Jon Swift Construction has much experience in completed school projects, they outsource all athletic fields to OSports. She introduced Adam Barker of OSports to explain options and costs to athletic fields. Mr. Barker discussed the range of costs with turf variations, and a possible track. He explained the process starting with hiring a design team to provide a field design that maximizes the space as NFHS certified, to include bleachers and/or a track.

Chair McElheny stated this decision to move forward does have a risk, but not doing anything would hold a bigger risk of losing the school. He directed the board with a 10-minute break.

Adjourned: 3:49pm.

Back to Order: 4pm.

Chair McElheny authorized the board to move forward with the process of consolidating both campuses to the SMA Prep Middle School campus, serving grades 6-12.

Mr. Ron Skipper moved to approve the consolidation of both campuses at the SMA Prep campus to serve grades 6-12 and to move forward in the process in the execution of the first phase allowing Mr. Fred Starling of The Starling Group to proceed in the rezoning; COL Ben Knisely seconded the motion and the board unanimously approved.

Mr. Skipper moved to approve the allocation of 250k needed to execute phase one of the campus consolidation; COL Knisely seconded the motion and the board unanimously approved.

Mr. Black moved to approve to engage Michael Saunders and Company as listing agent of the high school campus effective immediately and the agreed 3% in listing agreement; Mr. Skipper seconded the motion and the board unanimously approved. Mr. Pete Skokos recused himself from vote due to a conflict of interest.

Motion to Approve the 19 April 2026 Minutes:

Brig Gen Charles Shugg moved to approve the 19 April 2026 minutes; Mr. David Black seconded the motion and the board unanimously approved.

Head of Middle School: Dr. Cheryl Korwin provided a read-ahead report.

MS Faculty Representative: SMA-MAJ Marsha Reinig-Umana provided a read-ahead report.

MS Athletics Report: SMA-CPT Jared Lauther provided a read-ahead report.

CEO/Head of High School Report: SMA-COL Bowman provided a read-ahead report.

Brig Gen Shugg moved to approve the 2026-27 Comprehensive Evidence Based Reading Plan submitted annually to the district; Mr. Skipper seconded the motion and the board unanimously approved.

Mr. Black moved to approve the 2026-27 Board Meeting Schedule; BG Neff seconded the motion and the board unanimously approved.

HS Faculty Representative: SMA-CPT Esther Jaffee provided a read-ahead report.

HS Athletics Report: Coach Mick Fallis provided a read-ahead report.

Cadet Report: N/A

SAI Report: MAJ Osterfeld provided a read-ahead report.

Treasurer's Report: SMA-MAJ Savannah Kalka provided a read-ahead report. She discussed the projected budget on 846 FTE, with the district projecting 869 FTE.

Mr. Black moved to approve the 2026-27 proposed budget based on 846 FTE; BG Neff seconded the motion and the board unanimously approved.

Nominating Committee Report: N/A

Facilities Committee Report: N/A

Chair Report: N/A

PTCC Report: N/A

Alumni Recognition: N/A

Old Business: N/A

New Business: Chair McElheny stated approvals are needed of the 2026-27 Board Leadership.

COL Knisely moved to approve Dr. Thomas McElheny remain as board chair; Mr. Skokos seconded the motion and the board unanimously approved.

COL Knisely moved to approve Ms. Erica Gregory remain as board vice chair; Mr. Skokos seconded the motion and the board unanimously approved.

COL Knisely moved to approve Mr. Peter Skokos remain as board treasurer; Brig Gen Shugg seconded the motion and the board unanimously approved.

Mr. Skipper moved to approve COL Ben Knisely remain as board secretary; Mr. Skokos seconded the motion and the board unanimously approved.

Public Comments: N/A

Board Comments: N/A

The next board meeting will be on 25 August 2026 at 2:30pm at the High School campus.

The chair adjourned the meeting at 4:17pm.

Dr. Thomas McElheny, Chair

Date

COL Ben Knisely, Secretary

Date

SMA PREP

Board of Directors Read-Ahead

August 25, 2026

Dr. Cheryl Korwin, Head of School

Enrollment

Current Enrollment: 329 Cadets

SMA Prep has begun the 2026–2027 school year with a positive start. Our focus this year is not simply on maintaining enrollment, but on ensuring that every cadet who enters SMA Prep is known, challenged, supported, and given meaningful opportunities to lead.

Orientation & Family Engagement

Approximately **75–80% of our families were on campus prior to the first day of school** through orientation opportunities. This gave cadets the opportunity to locate classrooms, meet teachers, become familiar with campus expectations, and begin the year with greater confidence.

It also provided an important opportunity to strengthen the school-family partnership before the academic year began.

2026–2027 Theme: Rooted to Rise

Our schoolwide theme this year is **Rooted to Rise**.

The concept is simple: **strong growth requires strong roots**. At SMA Prep, those roots include relationships, character, accountability, leadership, academic habits, perseverance, and a sense of belonging.

Throughout the year, we will continue connecting our academic and leadership initiatives back to this theme. Before cadets can “rise” academically, socially, and as leaders, we must intentionally strengthen the foundations that allow that growth to occur.

Staff Professional Development: Rooted to Rise & the Invisible Backpack

Our pre-school professional development centered on **Rooted to Rise** and the concept of the **Invisible Backpack**.

Every student and adult enters school carrying experiences that may not be immediately visible—strengths, responsibilities, fears, family circumstances, previous successes or failures, and expectations about school.

Staff examined how these “invisible backpacks” can influence behavior, motivation, relationships, and learning. The emphasis was not on lowering expectations, but on understanding what a cadet may be carrying so that we can provide the appropriate support while continuing to hold every cadet to high standards.

This work supports our goal of creating a school where **grace and accountability work together**.

Academic Intervention & Progress Monitoring

We are continuing to strengthen our ability to identify and address individual academic deficiencies rather than waiting until formal testing reveals gaps.

Our instructional support programs include:

- **Progress Learning** – being utilized across content areas to identify deficiencies, provide targeted practice, and monitor progress.
- **IXL** – continuing in Math and ELA for individualized skill development and remediation.
- **Lexia** – supporting our English Language Learners.
- **Reading Plus** – providing additional literacy intervention and support for students needing intensive reading assistance.
- **Algebro** – added this year as a proactive FAST preparation resource, particularly to strengthen mathematics readiness.
- **Getting Things Done (GTD)** – continuing as a pilot this year for research purposes, helping cadets develop organization, planning, prioritization, and personal accountability skills.

The goal is to use data proactively—**finding the gap, addressing the gap, and monitoring whether the intervention is working.**

Department Mission Statements & SMART Goals

Each academic department is developing a **department mission statement** aligned with the overall mission of SMA Prep.

Departments are also establishing measurable **SMART goals** connected to our schoolwide academic target of reaching **at least 65% proficiency in all state-tested areas.**

These goals are intended to move our improvement work from broad aspirations to specific actions that can be measured throughout the year.

Monthly Data-Driven PLCs

Academic departments will participate in **monthly Data-Driven Professional Learning Communities with Administration.**

These meetings will focus on:

- Current student performance data
- Progress toward department SMART goals
- Students and standards requiring additional intervention
- Effectiveness of current instructional strategies
- Progress Learning and other diagnostic information
- Adjustments needed before the next assessment cycle

The emphasis will be on using data as a tool for **instructional decision-making rather than simply reporting results after the fact.**

Advisory: Cadet Goal Setting

Advisory will have an increased focus on individual cadet ownership of academic progress.

Cadets will establish and monitor goals related to their **grades and PM3 performance**. Classrooms will visibly track progress toward goals, and cadets will regularly revisit where they are, where they want to be, and what specific actions are needed to close the gap.

Our objective is for cadets to understand that academic data belongs to them—not just to their teachers.

Monthly Leadership Day

Once each month, SMA Prep will hold a dedicated **Leadership Day** designed to ensure that leadership is something cadets actively practice rather than simply study.

Our goal is for **every cadet to have a meaningful leadership role or area of service**. Opportunities will include Interact, grade-level leadership, Cadet Council, STEM, campus beautification, library leadership, Enrollment Day ambassadors, and additional roles as the program develops.

Leadership Days will also incorporate lessons from the **Medal of Honor Character Development Program**, using the experiences and values demonstrated by Medal of Honor recipients to explore concepts such as courage, commitment, integrity, sacrifice, citizenship, and personal responsibility.

The larger goal is to help cadets understand that **leadership is not a title—it is action, service, character, and responsibility**.

Clubs & Cadet Opportunities

SMA Prep is expanding opportunities for cadets to connect with school beyond the classroom. Current or planned clubs include:

Business • Weightlifting • Jiu-Jitsu • Archery • Bible Club • Cadet Council • STEM • Gaming • SWAT (Students Working Against Tobacco)

Additional clubs may be added as student interests and staff sponsorship develop.

These opportunities support our Rooted to Rise philosophy by helping cadets discover interests, develop relationships, practice leadership, and find meaningful ways to belong to the SMA Prep community.

Excellent Staff – Our Strongest Root

One of SMA Prep's greatest strengths continues to be our **staff**.

We have begun the year with an excellent team that is willing to collaborate, adjust when challenges arise, support one another, and maintain high expectations for cadets. Staff members have embraced our Rooted to Rise focus and understand that academic improvement, leadership development, character, and school culture cannot operate as separate initiatives.

Our work this year is intentionally connected:

Strong relationships → Strong expectations → Strong instruction → Strong leadership → Stronger outcomes for cadets.

We have had an excellent start to the school year and will continue focusing on strengthening our roots so that **every cadet has the opportunity to rise**.



ROOTED **TO** **RISE**

Strong Foundations. Deep Roots. Bright Futures. 

BACKPACK *What They Bring*



EVERY STUDENT
WALKS IN CARRYING
SOMETHING.

Experiences
Emotions
Strengths
Challenges
Dreams

FOUNDATION *What We Build*



WE CREATE A SAFE,
CONSISTENT, PURPOSEFUL
ENVIRONMENT.

Trust
Consistency
High Expectations
Belonging
Grace & Boundaries

ROOTS *What Grows Within*



STRONG ROOTS GROW
DEEP—EVEN WHEN NO
ONE IS WATCHING.

Character
Resilience
Integrity
Curiosity
Self-Discipline
Hope

TREE *Who They Become*



THESE ROOTS
PRODUCE VISIBLE
GROWTH.

Confidence
Leadership
Kindness
Problem Solving
Responsibility
Perseverance

FRUIT *What They Give*

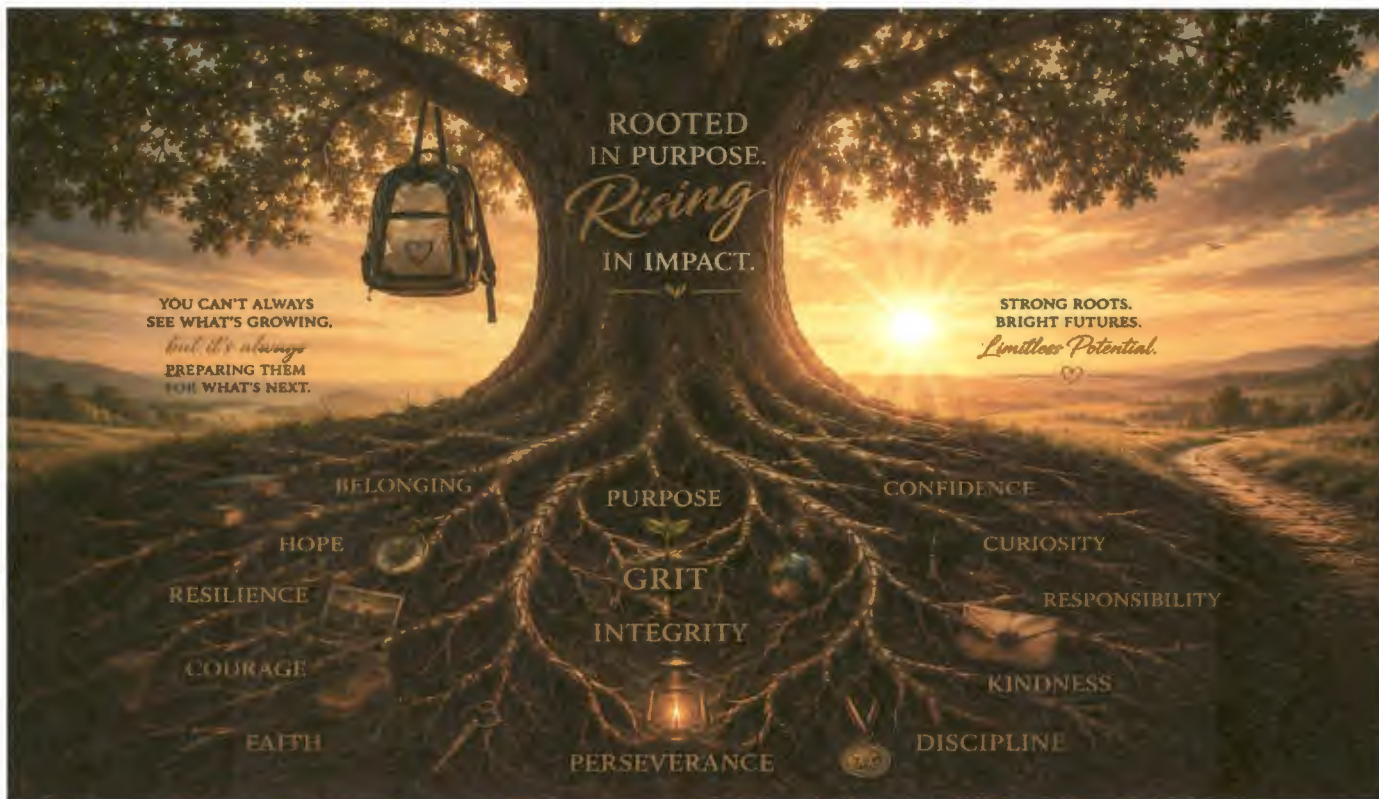


FRUIT THAT IMPACTS
LIVES AND CHANGES
THE WORLD.

Purpose
Service
Empathy
Leadership
Positive Impact



WE DON'T JUST TEACH. **WE PLANT.** WE CULTIVATE LIVES. TOGETHER, WE HELP STUDENTS RISE. 



SMA PREP

Every Root Matters.
Every Action Counts.
Every Cadet Can Grow.

ROOTED TO RISE

HONOR ★ INTEGRITY ★ RESPECT

THE DEEPEST ROOTS
PRODUCE THE HIGHEST
CANOPIES.

*Rooted Today.
Rising Tomorrow.*



Why We Are Rooted to Rise

- Because every cadet deserves to grow.
- Because our school is stronger together.
- Because beliefs build foundations.
- Because we cannot pour from an empty cup.
- Because when we grow, our students rise.
- Because we are called to make a lasting impact.

Our Canopy THE IMPACT WE CREATE TOGETHER



When our roots are strong, our canopy provides
shade, shelter, and strength for others.



Creating Goals That Grow

- START WITH PURPOSE – Know why it matters.
- SET YOUR ROOTS – Personal growth and professional growth.
- FOCUS ON WHAT MATTERS MOST – Choose your WIGS.
- TAKE INTENTIONAL ACTION – Small steps. Consistent effort.
- STAY ACCOUNTABLE – We rise higher when we rise together.
- CELEBRATE & REFLECT – Growth is a journey, not a destination.

The Backpacks We Carry



We cannot change every backpack, but we can choose
which ones we carry and how we respond.

Our Roots OUR FOUNDATION



OUR SCHOOL GOAL

65% OR BETTER
IN EVERY AREA
WE ARE MEASURED.

It takes all of us.
Every root. Every action. Every day.



Our Commitment



WE ARE THE ROOTS. *Together, Our Cadets Rise.*

When our roots go deep, storms
will not stop us—they will *strengthen* us.

BE THE ROOT. | CHANGE EVERYTHING.

Thank you for being the roots that make
SMA Prep a place where cadets rise.

Commissioned

TO CULTIVATE. TO LEAD. TO CHANGE LIVES.



- I WILL SEE** | Every cadet as capable, valuable, and born to lead.
- I WILL SOW** | Hope, challenge, and belonging in every classroom I enter.
- I WILL CULTIVATE** | Roots of character, curiosity, and confidence.
- I WILL STAND FIRM** | In consistency, compassion, and high expectations.
- I WILL COLLABORATE** | With colleagues, families, and our community to build one strong canopy.
- I WILL KEEP GROWING** | So I can help others grow even more.

**WE ARE NOT JUST
TEACHERS.
WE ARE GARDENERS
OF POTENTIAL.
WE ARE BUILDERS
OF LEADERS.
WE ARE SMA PREP.**

Go plant something extraordinary.
OUR CADETS. OUR SCHOOL. OUR LEGACY.



□ Sarasota Military Academy Prep

Board of Directors Read-Ahead | August 25, 2026

SMA Prep Board of Directors Liaison Report | MAJ Umana

□ Rooted to Rise | Building Leaders & Strengthening Culture | Rising through Leadership

As we begin the **2026–2027 school year**, SMA Prep is continuing to strengthen a culture centered on **character, leadership, accountability, and student ownership**. Through Advisory, classroom initiatives, Athletics, and ESE support, our faculty and staff are creating meaningful opportunities for cadets to **learn, lead, serve, and grow**.

□ Advisory | Rooted to Rise & Leader in Me

Through **Advisory**, SMA Prep is building upon the **Leader in Me** framework to establish a strong foundation of **character, leadership, accountability, and consistent school-wide procedures**. Cadets are developing the habits and mindsets needed for personal and academic success while learning not only **what** is expected, but **why** those expectations matter. The intentional focus on consistency, responsibility, and student ownership is helping to **strengthen and transform our school culture**.

□ Social Studies | National History Day

The Social Studies Department is launching **SMA Prep's first-ever participation in National History Day**, giving cadets an opportunity to develop **research, critical thinking, creativity, and presentation skills**.

This year's theme is "**Innovation in History: Impact, Influence, Change**." Cadets are already generating project ideas, and SMA Prep may advance up to **18 cadets**. The department is excited to establish this new tradition and showcase our cadets' work beyond the classroom.

□ Science | SOAR

The Science Department is implementing **SOAR — Be Safe, On Task, Act Responsibly, and Show Respect** — to strengthen positive behaviors and personal responsibility. Through **discussion, reflection, goal setting, and "I WILL" commitments**, cadets identify what expectations look and sound like and take ownership of their choices. SOAR complements **Leader in Me and Rooted to Rise** by developing responsible, respectful, and self-directed leaders.

☐ Athletics | Expanding Opportunities

SMA Prep Athletics is expanding opportunities through **new training, partnerships, teams, camps, and fundraising initiatives.**

- Exploring **D1 Strength Training** for sport-specific strength and conditioning throughout the year.
- Planning a **Ken Culuko Basketball Camp** for students in grades 4–12, featuring NBA trainer and D1 Hall of Famer Ken Culuko.
- Launching a **Pickleball Team** this school year.
- Producing athletic booklets through a **zero-cost partnership** projected to generate approximately **\$2,000 for Athletics.**
- Adding **food trucks at outdoor sporting events** to create additional fundraising opportunities.
- Hosting a **Cross Country home meet on November 9**, expected to bring approximately 7–8 schools to campus.

These initiatives expand opportunities for cadets while strengthening **community partnerships, school spirit, and support for student programs.**

☐ ESE Department | Year 5: Growing Stronger Together

Entering **Year 5**, the ESE Department continues to build on a strong foundation of **collaboration, individualized support, and high expectations.**

Our ESE team works closely with **cadets, families, and general education teachers** to communicate student needs, identify barriers, implement appropriate supports, and improve student performance. This collaborative approach allows us to respond proactively and ensure cadets are **known, supported, challenged, and empowered to succeed.**

This year, we are continuing to strengthen **IEP implementation, family communication, teacher collaboration, and student ownership of learning.**

☐ Interact Club

SMA Prep will also launch an **Interact Club**, facilitated by **MAJ Umana**, providing cadets with opportunities to develop **leadership, service, teamwork, character, and responsibility.** Additional updates will be shared as the club develops.

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 849/SCSB 869 (-20)
 - 2026-2027 Budget 846 (+3)
 - High School: 520/SCSB 531 (-11)
 - Class Size: 20.48
 - 2025-2026 22
 - SCF Fall Semester: 5 FT 10 PT
 - STC: 16
 - OJT: 7
 - Prep: 329/SCSB 338 (+1))
 - Class Size: 18.52
 - 2025-2026 22
 - 55% 8th Grade to 9th Grade
 - 2025-2026 60%
 - Transportation Coordination with SMA and SSAS
 - A huge thank you to SMA-LTC Williams, SMA-LTC Burns and SSAS for their amazing teamwork! Bus routes are finalized and on time.
 - Professional Development plans are being completed by all instructional staff. Form provided.
- **College, Careers, and Citizenship**
 - Additional Career and Technical (CTE) courses have been implemented in order to increase the High School College and Career Acceleration rate for school grade.
 - Environmental Science/Ducks Unlimited CTE
 - Required for all freshmen
 - Creative Photography/Adobe CTE
 - Entrepreneurship/Business Ownership CTE

- Previous and current courses:
 - Game and Simulation Foundations CTE
 - Game and Simulation Design CTE
 - Game and Simulation Programmer CTE
- Goal for 2026-2027 60% (one year lag for school grade)

- **Character and Leadership Development**
 - Medal of Honor
 - Instructional leaders are working with departments to determine assigned lessons.
 - All cadets will participate in Introductory Lessons A1-A11

Communication/Community Outreach:

- Labor Day: September 7, 2026 Campuses Closed
- Veterans Day Parade: November 11, 2026
- Next Meeting: September 22, 2026 2:30 pm High School Campus



Sarasota Military Academy
Professional Improvement Plan

Name: _____ Dept./Subject: _____ School Year: _____

Professional Plan	Detailed Outline	Admin and Staff Initials
Specific Area of Improvement		Admin: Staff:
Professional Growth Objective		Admin: Staff:
Expected Student Outcomes		Admin: Staff:
Professional Development Activities		Admin: Staff:
Evaluation of Professional Development Activities		Admin: Staff:
Collaborating Personnel		Admin: Staff:

Initial Review Meeting Date: _____

Final Review Meeting Date: _____

- Improvement goal must be a measurable data point based on the previous school year's performance.
- Professional Development Growth Objective must be clearly defined (i.e. implementing strategies for student growth, mapping specific data points, common assessments with collaborative analyzation, etc.)
- Student Outcomes must be measurable through data points collected throughout the school year (or one semester).
- Professional Development Activities may include workshops, study groups, action research, coaching, reading resources, classroom visits, self study, data analysis, school and district provided training).
- Evaluation of Professional Development Activities will utilize student performance data to demonstrate objective accomplishment.

Athletic Department Report Board Meeting – August 25, 2026

SMA athletics is back in full swing with our fall sports seasons (Golf and Cross Country). Golf will have their first match of the year on September 3rd vs. Imagine School of North Port at our home course, Tatum Ridge Golf Club. Cross Country has their first run at the Lemon Bay Invitational on Saturday August 22nd. Participation numbers for both sports are solid.

We are continuing to push fundraising through our crowd funding platform and looking to secure advertising and sponsorship commitments to bolster our financial stability. It is an ongoing process. Rental of our gymnasium to outside groups is a key avenue to generate revenue as well.

Finally, paperwork is being completed per request by several student-athletes who are playing at other schools for sports we do not offer at SMA. I believe this is further evidence to support the Boards directive to make Athletics a priority to promote and develop as we move forward. Parents and students alike are choosing schools based upon what those schools are offering. It can only help us long term to solidify this aspect of our institution.

SARASOTA MILITARY ACADEMY

Senior Army Instructor
801 North Orange Avenue
Sarasota, Florida 34236

25 August 2026

MEMORANDUM FOR GOVERNING BOARD, SARASOTA MILITARY ACADEMY

THRU: Superintendent Sarasota Military Academy

SUBJECT: Significant Activities Report (SAR)

Significant Activities (AUG 2026):

- **3-6 AUG 2026: SMA JROTC DEPT:** JROTC Cadet Leadership Camp (SMA H.S. Campus)
- **15 AUG 2026: SMA JROTC DEPT:** Raider Tryouts (SMA H.S. Campus)
- **17 AUG 2026: SMA JROTC DEPT:** Inaugural Archery Team Meeting (SMA H.S. Campus)
- **24 AUG 2026: SMA JROTC:** Service Academy / ROTC Scholarship Cohort Meeting (SMA H.S. Campus)
- **25 AUG 2026: SMA Color Guard:** Veterans Brunch (Sarasota, FL)

Significant Activities (SEP 2026):

- **1-4 SEP 2026: 6th BDE JROTC:** Contract Workshop (Hunter Army Airfield, GA)
- **9 SEP 2026: SMA Color Guard:** West Coast Black Theater Troop Founders Event (Sarasota, FL)
- **19 SEP 2026: SMA Color Guard:** Annual Life Story 5K/10K @ Nathan Benderson Park (Sarasota, FL)
- **19 SEP 2026: SMA JROTC Raiders:** Braden River Rumble (Bradenton, FL)
- **26 SEP 2026: SMA JROTC Raiders:** SMA Raider Invitational @ Riverview H.S. (Sarasota, FL)

SAI Summary and Outlook:

• **Summary:** The SMA JROTC Department started off the 2026-2027 School Year w/ our annual Cadet Leadership camp from 3-6 August. Leaders conducted physical assessments and brushed up on Academy standards as well as their roles as student leaders. The department is currently preparing for our JROTC Program for Accreditation (JPA) evaluation in March. We are also refining our supply operations w/ our new supply tech Maria Urressta. Additionally we've added a JROTC Archery Team that will be competing this fall along with our Raider Team. We've also requested new drone equipment to field a drone and robotics team here at SMA.

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

Sarasota Military Academy Budget Comparison

	July '26 Actual	Annual Budget	% of Budget
Income			
FEFP Funding	789,234	9,211,197	8.57%
Capital District Funding	47,116	1,068,027	4.41%
Millage District Funding	164,931	1,342,465	12.29%
Federal Funds	-	221,571	0.0%
Contributions and Grants	2,850	80,240	3.55%
Interest, Gains/Losses	1,673	21,692	7.71%
Other Income	12,019	576,277	2.09%
Total Income	1,017,823	12,521,469	8.13%
Expenses			
Payroll and Benefits	539,342	8,221,880	6.56%
Supplies	11,432	246,054	4.65%
Curriculum	1,640	43,741	3.75%
Student Activities	9,747	228,342	4.27%
Technology	34,607	130,555	26.51%
Professional Services	84,042	1,193,785	7.04%
Transportation Operations	-	986	0.0%
Facilities & Occupancy	-	13,795	0.0%
Utilities	24,244	439,458	5.52%
Insurance	228,759	416,760	54.89%
Repairs & Maintenance	46,741	165,440	28.25%
Equipment & Furniture	520	85,911	0.61%
Debt Service	24,707	319,636	7.73%
Depreciation	58,594	845,601	6.93%
Total Expenses	1,064,375	12,351,945	8.62%
Operating Gain/Loss	(46,551)	169,524	-27.46%

Notes:

1 month in should be at 8.3%

Insurance Premiums \$228k

Campus Repair Work \$36k

Dear Colleagues

I have recommended that the Strategic Planning Committee advance four outcome-focused priorities to strengthen SMA's fiscal health, student achievement, institutional identity, and leadership continuity during campus consolidation. These priorities are intentionally presented as preliminary frameworks for the Committee and Board to refine, own, and implement.

1) Continue to improve and maintain The Academy's fiscal health

Current plans to sell the High School property, consolidate SMA on the Prep campus coupled with thoughtful fiscal management going forward will accomplish this most important Board function as defined by the state legislature.

2) Hold Administration strictly accountable for achieving a B rating for The Academy for the '26-'27 school year while improving student achievement test scores.

SMA has received a C rating for three successive school years, while its student achievement scores remain among the lowest in the county. Reaching a B rating and materially improving achievement should therefore be the Administration's top priority, supported by monthly Board review of defined actions, accountable owners, leading indicators, and progress against each rating component.

3) Establish clear agreement about who SMA is and which priorities will turn that identity into measurable results while sharpening our Public identity.

Although the Board and administration already use common language, we have yet to clearly define or publicly share that differentiation nor the actions, measures, responsibilities and accountability required to make that identity successful.

A possibility for consideration: SMA could evaluate becoming Florida's premier public academy for leadership and character development, using our military traditions as a means of delivering the mission rather than as the mission itself. Military traditions and JROTC can be powerful tools for advancing this mission without positioning SMA primarily as a military pipeline or unfortunately as much of the public now defines us, as a "reform" academy.

4) **Develop both Board and Administration Succession Plans**

Over the next 12 months, I recommend the Board assess the leadership structure required to oversee academy-wide character and leadership development, including whether to initiate a search for a JROTC Commandant. I believe a true leadership professional is needed.

Any resulting role design should clarify responsibilities, reporting relationships, decision rights, and how the structure would strengthen JROTC programming and **SMA's differentiation** while preserving the current SAI's position and contributions.

Over the next 24 months I also recommend the Board establish succession plans for the Board Chair and Academy CEO, with both selections focused on continuing the strengthening and refined direction of The Academy.

Respectfully

Tom McElheny