

# The Classical Academy of Sarasota Inc



## SUMMARY

### Mission

The mission of The Classical Academy of Sarasota is to develop the academic potential of each student through a rigorous, content-rich, classical liberal arts education while building in them a virtuous character.

### Contact Information

<b>Primary Address</b>	8751 FRUITVILLE RD SARASOTA, FL 34240-0000
<b>Alternate Address</b>	8751 Fruitville Rd Sarasota FL 34240
<b>Phone</b>	941 925-2153
<b>Email</b>	info@tcasarasota.com
<b>Website</b>	<a href="http://www.tcasarasota.com/">http://www.tcasarasota.com/</a>
<b>Facebook</b>	TCASarasota

### General Information

<b>Nonprofit</b>	The Classical Academy of Sarasota Inc
<b>Tax Exempt Status</b>	Public Supported Charity
<b>Incorporation Year</b>	2014
<b>State Charitable Solicitations Permit</b>	Yes Dec 2018
<b>State Registration</b>	Yes 0

# BACKGROUND & NEEDS

## Impact Statement

### Academic Accomplishments

- Held our first graduation - all our students will be attending college in the fall
- Received accreditation through AdvancED after only our second year in operation
- 29 of our students who took the National Latin Exam finished in the top 5% worldwide
- Formed National Honor Society and inducted five members

### Overall Accomplishments

- Increased enrollment to 290 in the school's fourth year of operation
- Raised \$154,000 toward our capital campaign
- Set aside an additional \$75,000 toward future growth and a rainy day fund
- Added three new sports, including high school basketball

### Goals for the Current Year

- Increase overall student performance on PSAT and ITBS tests
- Continue expanding our theater department and sports program
- Continue the capital campaign to raise funds for a permanent building to allow for future expansion

## Needs Statement

1. Band/orchestra program. Needs include: instruments, music, stands, etc. \$5000
2. We are committed to keeping our education affordable and to helping families with economic need. Many of our families sacrifice and stretch their limited resources to provide their child with an education at TCA. We want to create a scholarship fund for families who desire a classical education but it is not financially accessible. \$500 to \$10,000
3. An Admissions Counselor would better reach out into our community to share what we offer at The Classical Academy. This person would guide parents through the admissions process, coordinate events that would serve to promote the school, and oversee and manage parent satisfaction for superior student retention rates. Part-time position \$18,000

## Background Statement

The Classical Academy of Sarasota (TCA) began six years ago as a dream to bring classical education to Sarasota. The vision of its founders was to create a school committed to a classical liberal arts education emphasizing civic virtue. The founders spent two and a half years working with Hillsdale College, along with several other classical schools, in creating the foundation upon which TCA is built. TCA educates students in the best of the Western tradition, training them to become logic, virtuous citizens, who are equipped to participate in the Great Conversation. Original source documents, classical literature, memorization, Latin, scientific research, geography, and mastery of mathematical concepts become the foundation upon which students understand the world and begin to draw out their own conclusions.

TCA opened its doors in the fall of 2014 with 187 students in grades pre-K through 10th grade. In its fourth year, TCA is serving students in pre-K through 12th grade, and has now reached its capacity of 290 students in its current facility. TCA hopes to continue gaining momentum toward its capital campaign, allowing the school to expand in the summer of 2018, enabling TCA to offer an excellent education to even more students.

We believe the freedom and educational advancement which our school provides will prove to far outweigh the barrier of tuition. TCA's Governing Board is working fervently to fundraise and secure financial scholarships for families who have a genuine need and are committed to classical education. Our school provides for the educational needs of McKay Scholars and provides for many students under the Step-Up program for lower income households. The Governing Board is working to create a budget and set tuition which is fiscally responsible, while keeping tuition costs to a minimum.

## Statement from the Board Chair

*What we obtain too cheap, we esteem too lightly: it is dearness only that gives everything its value. – Thomas*

Paine, *The American Crisis*, Number 1

It is with great pride that I write on behalf of our school, The Classical Academy of Sarasota.

TCA's founders spent two and a half years consulting with Hillsdale College in the creation of the school which has helped establish the strong foundation which TCA will build upon in the coming years.

As a new school there are many challenges that we face. Among the most significant was obtaining Accreditation. I am very happy to say that we have recently gone through the accreditation process successfully. A great accomplishment for a school that has only been in existence for three years!

Another accomplishment is that our student body grew to a total of 290 students after just three years in existence. This speaks volumes for the community's desire for our approach to education.

We offer a classical liberal arts based curriculum with a great deal of emphasis on the four virtues; prudence, fortitude, temperance, and justice. We have fourteen "habits" that help students and staff inculcate these virtues. We can relate all of this to current behavior and personal growth. The aim of classical education, and consequently TCA, is to teach children to spend time with, enjoy, discuss and think about the good, the beautiful, and the true. This includes how students spend their leisure time, the books they read, the music they listen to, the movies they watch, and the people with whom they spend time. Our students will study the diverse opinions within the great ideas of history and literature, and will be readily able to decipher what is good, what is beautiful, and what is true.

At TCA we have a wonderful patriotic approach to things. For example, students start the day by saying the Pledge of Allegiance. My fourth grade son learned and memorized the Gettysburg Address the first week of school and my sixth grade son learned and memorized the Declaration of Independence.

Currently we are renting space from Faith Baptist Church. We would like to own our own facility. We have formed a building committee to begin the work that is needed to accomplish this goal.

We are very proud of having 290 students enrolled in our school, and although our current space can accommodate the students, we need to expand our facilities. We would like to realize this expansion in the next year. We feel we are the best kept secret in town and as the word gets out we should be able to reach this goal.

Even though we are new school we have had extracurricular sports since our first year. These have been for the Lower and Middle School in the form of soccer, cross country and basketball. We have added volleyball, flag football, and high school basketball. We plan to add tennis, golf, and high school volleyball this year.

We have a multitude of clubs and would like to expand these. We are very proud of our Latin Club which recently had over a dozen students rank in the top 5% in the world.

The amount of work for our Principal and Registrar continues to grow. This makes the need for an Administrative Assistant critical. Although we are a relatively low tech school, we do need an IT network with a central server. As you can imagine the uses for this are great, but so is the expense.

## Statement from the CEO/Executive Director

The Classical Academy of Sarasota reflects the heart of the American spirit. The school began as a dream my wife and I had to bring a classical liberal arts school to Sarasota. As we shared our vision for the school, parents became excited about a back to basics education, a return to the fundamentals. An education rooted in history, teaching the events of the past, from a first source perspective, where kids read the greatest works mankind has produced. An education where the mind is elevated above technology, where great conversations are fostered and kids are taught to think. An education grounded in the classical virtues of temperance, prudence, justice and fortitude, where kids are taught habits which ultimately built a virtuous heart. An education where students memorize great works, study the mysteries and facts of science, read the classics, and learn Latin.

TCA is a school which believes in American exceptionalism and that there are Natural Laws which guide us all. It is an understanding of these truths which makes TCA unique and which has caused the school's explosive growth. As we look to the future we hope to be able to offer this education to many more students. We would love to have you come by the school for a visit!

## Areas Served

FL- Sarasota

## Service Categories

**Primary Organization Type**

Education

# PROGRAMS

## Parent Information and Enrichment Night (PIE Night)

<b>Description</b>	Each semester the administration and staff of TCA host 2 or 3 Parent Information and Enrichment Nights (PIE Nights) for parents and community members. The purpose of these nights is to educate parents on the heart and philosophy of TCA. Topics include; the importance of reading, the effects of technology and the screen on a child's brain, the birds and the bees, and intentional gift giving. These nights provide a great opportunity to stimulate conversation and build community.
<b>Budget</b>	\$1,500.00
<b>Category</b>	Education, General/Other Education, General/Other
<b>Program Linked to Organizational Strategy</b>	Yes
<b>Population Served</b>	Adults Adults Adults
<b>Short Term Success</b>	Parents and community members will leave with a better understanding of the philosophy and heart of TCA. Also parents will be better equipped to raise their children to reflect the virtues and habits taught at TCA.
<b>Long Term Success</b>	Ultimately, TCA will create a community of parents and community members who give great thought to raising the next generation of citizens. These parents will understand the importance of raising virtuous and logical children who will make a difference in their community.
<b>Program Success Monitoring</b>	Parents and community members continue to attend and express the gratitude they feel for the program.
<b>Program Success Examples</b>	May parents have sent emails and letters to the school expressing gratitude for the changes they have seen in their families because they implemented the things discussed during a PIE Night.

## Veterans Day Ceremony

<b>Description</b>	Each year on Veterans Day TCA hosts an all school assembly to honor the men and women who have defended our great country. We know that our freedoms are not free and we pause each year to thank our veterans for their sacrifice and dedication. We invite a community member who is a retired or active military veteran to speak to our students. This is an important way for us to practically demonstrate and introduce our students to the men and women who have fought to safeguard our rights and freedoms. We ask TCA families to submit pictures of loved ones who have served and we play a slide show at the end of the ceremony.
<b>Budget</b>	\$500.00
<b>Category</b>	Education, General/Other Education, General/Other
<b>Program Linked to Organizational Strategy</b>	Yes
<b>Population Served</b>	Children and Youth (0 - 19 years) Adults Adults
<b>Short Term Success</b>	This program will give TCA students a greater appreciation of the sacrifice made by our military veterans. Our students will understand that their freedom was bought with a price and that it is important that we pause to honor those who have given so much.
<b>Long Term Success</b>	The long term success will be determined by the appreciation demonstrated by our students to veterans in the years to come. We want members of the community to be a part of our ceremony and for our students to meet these men and women. TCA would love for this ceremony to become a hallmark in the Sarasota community.
<b>Program Success Monitoring</b>	The students sit with rapt attention and listen to the guest speaker, they ask to write thank you cards and letters to veterans, and parents and community members write to the school to express their gratitude.
<b>Program Success Examples</b>	The Veterans Day Ceremony has grown in attendance each year we have hosted it. This growth came from community members and parents taking time out of their day to attend.

## Theater

<b>Description</b>	The first two years for our theater department were a huge success!! Last year we put on a production of Sleepy hollow, in December, and a musical production of The Jungle Book, in May. Both productions included students from multiple grade levels and showcased the talents of our students. Parents and community members packed the auditorium on the nights of the show. We anticipate many more productions in the years to come and look forward to expanding our theater department.
<b>Budget</b>	\$10,000.00
<b>Category</b>	Arts, Culture & Humanities, General/Other Theater
<b>Program Linked to Organizational Strategy</b>	Yes
<b>Population Served</b>	Children and Youth (0 - 19 years) Adults Families
<b>Short Term Success</b>	In our first year we produced, A Christmas Carol, with over 70 students involved along with multiple staff and parents. In the spring of 2016 we produced Alice in Wonderland, with over 50 students were involved. Last year TCA saw the productions of Sleepy Hollow and The Jungle Book. Each of the productions allowed our students to showcase their talents. The productions also help promote TCA throughout the community. Each of the four productions had over 400 parents and community members in attendance.
<b>Long Term Success</b>	We anticipate our theater department growing to further expand the talents of the students along with the reach of the arts into the Sarasota community. We hope to host Shakespeare plays and Broadway musicals in the future.
<b>Program Success Monitoring</b>	Our theater director is constantly seeking feedback and advise from those around her. The program is under consistent evaluation and has made improvements for the upcoming school year.
<b>Program Success Examples</b>	Each of the productions was attended by over 400 parents and community members. We were able to offer an excellent night's entertainment for a very affordable price.

# MANAGEMENT

## CEO/Executive Director

<b>CEO/Executive Director</b>	Mr. Josh Longenecker
<b>CEO Term Start</b>	May 2014
<b>CEO Email</b>	josh@tcasarasota.com

### Experience

Mr. Josh Longenecker is the founder and principal of The Classical Academy of Sarasota. He and his wife Harmony worked with Hillsdale College, along with several other classical schools, for two and a half years in the creation of TCA. Prior to becoming the principal Mr. Longenecker taught 5th grade for 7 years; 3 years in Sarasota and 4 years in Colorado Springs, CO at a classical school. Before beginning his career in education Mr. Longenecker owned and operated a landscape company, managing over 40 employees. Mr. Longenecker holds a bachelor's degree in Pastoral Ministry and an M.Ed. in Administration and Leadership.

## Staff & Volunteer Statistics

<b>Full Time Staff</b>	29
<b>Part Time Staff</b>	6
<b>Staff Retention Rate %</b>	90
<b>Professional Development</b>	Yes
<b>Contractors</b>	0
<b>Volunteers</b>	65
<b>Management Reports to Board</b>	Yes
<b>CEO/Executive Director Formal Evaluation</b>	Yes
<b>Senior Management Formal Evaluation</b>	N/A
<b>NonManagement Formal Evaluation</b>	No

## Collaborations

Not Applicable

## Comments

### Management Comments by Organization

We are so fortunate to have so many families seek out the education our school can provide. We are challenged with our educational space. We are challenged by trying to keep tuition affordable. We are challenged to provide the organizational infrastructure necessary to competitively run our school. We are challenged in attracting and retaining staff that are trained to teach classically and that are willing to make a financial sacrifice to teach at our school. AND we consider all of these to be opportunities! To begin a brand new approach to education. To seek to be bolder in asking for funding. To seek out staff for whom Classical Education is a personal mission. And to prepare your people from our area with a virtues based education akin to that of our Founding Fathers!

# GOVERNANCE

## Board Chair

<b>Board Chair</b>	Dr. David Sugar
<b>Company Affiliation</b>	Sugar Orthopaedics
<b>Board Term</b>	Apr 2016 to Apr 2017
<b>Board Chair Email</b>	dsugar@drsugar.md

## Board Co-Chair

<b>Board Co-Chair</b>	Dr. Joseph Penge
<b>Company Affiliation</b>	Penge Chiropractic
<b>Board Term</b>	Apr 2016 to May 2019
<b>Board Co-Chair Email</b>	drpenge@comcast.net

## Board Members

<b>Name</b>	<b>Affiliation</b>	<b>Status</b>
Mr. Wayne Carr	Route Transportation & Logistics, Inc.	Voting
Mr. Harry Lambroussis	Retired	
Dr. Joseph Penge	Penge Chiropractic	Voting
Dr. David Sugar	Sugar Orthopaedics	Voting

## Board Demographics - Ethnicity

<b>African American/Black</b>	0
<b>Asian American/Pacific Islander</b>	0
<b>Caucasian</b>	4
<b>Hispanic/Latino</b>	0
<b>Native American/American Indian</b>	0
<b>Other</b>	0 0

## Board Demographics - Gender

<b>Male</b>	4
<b>Female</b>	0
<b>Not Specified</b>	0

## Governance

<b>Board Term Lengths</b>	1
<b>Board Term Limits</b>	99
<b>Board Orientation</b>	No

<b>Number of Full Board Meetings Annually</b>	8
<b>Board Meeting Attendance %</b>	98
<b>Board Self-Evaluation</b>	Yes
<b>Written Board Selection Criteria</b>	No
<b>Percentage of Board Making Monetary Contributions</b>	100
<b>Percentage of Board Making In-Kind Contributions</b>	100
<b>Constituency Includes Client Representation</b>	Yes

## Standing Committees

Capital Campaign  
Campus Planning and Development  
Parents

## Comments

### **Governance Comments by Organization**

Now in its fourth year, TCA has established itself within the Sarasota community. The teachers and staff are fully dedicated to the mission and philosophy of TCA and classical education. As classical education has a resurgence across the United States, TCA is honored to offer this time-honored approach to education to Sarasota and surrounding communities.

As we begin our fourth year the possibilities are limitless. We look forward to partnering with individuals who believe in the principles our great country was founded upon. Individuals who desire to see the next generation of students become citizens steeped in constitutional and historical truths.

# FINANCIALS

## Current Financial Info

<b>Fiscal Year Begins</b>	2017
<b>Fiscal Year Ends</b>	2018
<b>Projected Revenue</b>	\$1,794,050.00
<b>Projected Expenses</b>	\$1,682,053.00
<b>Total Projected Revenue includes "in-kind" contributions/ donations</b>	
<b>Endowment Value</b>	\$0.00
<b>Spending Policy Percentage</b>	0
<b>Tax Credits</b>	No

## Capital Campaign

<b>In a Capital Campaign</b>	Yes
<b>Campaign Purpose</b>	To fund a downpayment for our own property and educational structure.
<b>Campaign Goal</b>	500000
<b>Dates</b>	Apr 2017 to Apr 2019
<b>Raised To Date</b>	160000 as of 0

## IRS Form 990s

[2015 990](#)

[2014 990](#)

[2014 990](#)

[Form 990](#)

## Audit/Financial Documents

[Financial Statement](#)

## Solvency

### Short Term Solvency

<b>Fiscal Year</b>	<b>2016</b>	<b>2015</b>	<b>2014</b>
<b>Current Ratio: Current Assets/Current Liabilities</b>	1.00	--	--

### Long Term Solvency

<b>Fiscal Year</b>	<b>2016</b>	<b>2015</b>	<b>2014</b>
<b>Long-Term Liabilities/Total Assets</b>	0%	0%	0%

## Historical Financial Review

**Revenue and Expenses**

Fiscal Year	2016	2015	2014
Total Revenue	\$1,526,676	\$619,213	\$641,588
Total Expenses	\$1,499,614	\$452,774	\$418,834

**Revenue Sources**

Fiscal Year	2016	2015	2014
Foundation and Corporation Contributions	\$0	\$0	\$0
Government Contributions	\$0	\$0	\$0
Federal	\$0	\$0	\$0
State	\$0	\$0	\$0
Local	\$0	\$0	\$0
Unspecified	\$0	\$0	\$0
Individual Contributions	\$39,967	\$33,293	\$55,176
Indirect Public Support	\$0	\$0	\$0
Earned Revenue	\$1,414,013	\$519,862	\$583,795
Investment Income, Net of Losses	\$35	\$14	\$0
Membership Dues	\$0	\$0	\$0
Special Events	\$71,958	\$66,044	\$2,617
Revenue In-Kind	\$0	\$0	\$19,672
Other	\$703	\$0	\$0

**Expense Allocation**

Fiscal Year	2016	2015	2014
Program Expense	\$1,376,973	\$432,558	\$414,069
Administration Expense	\$82,607	\$5,383	\$0
Fundraising Expense	\$40,034	\$14,833	\$4,765
Payments to Affiliates	\$0	\$0	\$0
Total Revenue/Total Expenses	1.02	1.37	1.53
Program Expense/Total Expenses	92%	96%	99%
Fundraising Expense/Contributed Revenue	36%	15%	8%

**Assets and Liabilities**

Fiscal Year	2016	2015	2014
Total Assets	\$1,756,998	\$393,173	\$226,733
Current Assets	\$1,577,677	\$337,043	\$177,840
Long-Term Liabilities	\$0	\$0	\$0
Current Liabilities	\$1,582,123	\$0	\$0
Total Net Assets	\$174,875	\$393,173	\$226,733

**Top Funding Sources**

Fiscal Year	2016	2015	2014
Top Funding Source & Dollar Amount	Tuition \$1,362,867	Tuition \$501,047	Tuition \$575,925
Second Highest Funding Source & Dollar Amount	Fundraising \$71,958	Fundraising \$66,044	Contributions, gifts, grants \$55,176
Third Highest Funding Source & Dollar Amount	Student Activities \$51,146	Contributions, gifts, grants \$33,293	Application Fees \$7,870

**Comments****Financial Comments by Organization**

We successfully completed our first financial audit for the 15-16 fiscal year. The school engaged an independent firm to conduct the audit. TCA is in great financial standing and looking forward to continued success in the future. We are in the middle of a capital campaign with a goal of raising \$500,000. We have already raised \$160,000 toward our goal and hope to break ground on a new building in the spring of 2018.

**Financial Comments by Foundation**

Financial information taken from Federal 990-EZ and 990. Contributions may include foundation and corporate support as they are not separately stated.

# PLANS, POLICIES & LICENSES

## Plans

<b>Fundraising Plan</b>	No
<b>Communication Plan</b>	No
<b>Strategic Plan</b>	No
<b>Management Succession Plan</b>	No
<b>Continuity of Operations Plan</b>	No

## Policies

<b>Organizational Policies and Procedures</b>	No
<b>Written Conflict of Interest Policy</b>	Yes
<b>Nondiscrimination Policy</b>	Yes
<b>Directors and Officers Insurance Policy</b>	No
<b>Whistle Blower Policy</b>	No
<b>Document Destruction Policy</b>	No

## Government Licenses

**Is your organization licensed by the Government?**

## Planning & Policies Comments

**Planning & Policies Comments by Organization**

**Planning & Policies Comments by Foundation**