

## General Information

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### Description Area

\* The form will close at 5:00 PM ET on Wednesday, February 1, 2023, and no submissions will be accepted after that time.\*In 1996, the South Carolina Legislature passed the Charter Schools Act, allowing citizens to apply to operate a public school. The focus of charter schools is to provide quality educational choices for parents and students. This application outlines the necessary components to propose, receive approval for, and implement a high-quality charter school. Based on the provided guidance and SCDE template, this application form must be used to develop a complete application for charter schools that plan to open for the 2024–25 school year or later. Applicants who do not use this form will not be eligible to apply for federal Planning and Implementation Grant funding under awards currently held by the South Carolina Department of Education (SCDE). All charter school applications must comply fully with the South Carolina Charter Schools Act, S.C. Code Ann. § 59-40-10 et seq., and the Procedures and Standards for Review of Charter School Applications (2 S.C. Code Ann. Regs. 43-601 (2013)). Application sections must be presented as outlined in this form and labeled accordingly with appropriate questions/headings. It is important to remember that each of the sections relates to one another. For instance, educational program components should align with the proposed budget. Thus, a completed application should readily reflect that all of its sections, irrespective of their individual focus, link together to form a comprehensive and viable plan to open and sustain a high-quality charter school. The application form has multiple pages (9) broken into: Application Cover Page, Executive Summary, Educational Plan and Capacity (part 1 and 2), Organizational Plan and Capacity (part 1 and 2), Business Plan and Capacity, Appendices, and Signature Certification Page. You may begin working on the form, save and return to the form at a later time using the unique link generated at the time the form is saved. Please use the Submission Guide to help you navigate the application.

## Application Cover Page

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**Proposed Sponsor** Charter Institute at Erskine

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## Applicant Information

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**Name of Proposed Charter School** Ethos Academies - Kershaw

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**Name of Applicant Group** Ethos Academies - Kershaw

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**City and Zip Code for Proposed Charter School** Camden 29020

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**FEIN** 92-2039604

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## Contact Information

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**Name of Committee Chair** Mr. DuJuan Council

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**Title/Position** Planning Committee Chair

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**Mailing Address of Committee Chair** 29 Findlay Circle  
Elgin, SC 29045

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**Primary Contact Number** (803) 530-5192

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**Email Address of Committee Chair** dcouncil0@gmail.com

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## Additional Information about Proposed Charter School

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**Is the proposed school a virtual charter school?** No

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**Does the proposed school intend to partner with a charter and/or education management organization (CMO/EMO)?** Yes

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**Proposed Grade Levels** Kindergarten = First Year of Operation, Full Matriculation  
First Grade = First Year of Operation, Full Matriculation  
Second Grade = First Year of Operation, Full Matriculation  
Third Grade = First Year of Operation, Full Matriculation  
Fourth Grade = First Year of Operation, Full Matriculation  
Fifth Grade = First Year of Operation, Full Matriculation  
Sixth Grade = First Year of Operation, Full Matriculation  
Seventh Grade = Full Matriculation  
Eighth Grade = Full Matriculation

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## Executive Summary

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**Executive Summary Upload**

<https://www.formstack.com/admin/download/file/14100830209>

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## Response to Evidence of Need and Support

### 1. Evidence of Support

While members of the planning committee are eager to provide school choice to rural communities, some members of the Kershaw community have misgivings about a public charter school opening in their community. Because there is only one other charter school in Kershaw, this is a new concept that requires educating the public to gain their trust before parents would consider leaving the district schools with which they might not be happy but are familiar. During February and March, the Planning Committee will continue connecting with members of the public to educate them and gauge their interest in enrollment at Ethos Academies. The Committee will send an update before the interview in April.

### 2. Student Recruitment Plan

Ethos Academies will recruit students from among residents of Camden, the larger Kershaw County, and its surrounding districts. When recruiting prospective students, Ethos Academies will focus on Kershaw due to the concentration of average-performing schools and the absence of choices related to classical education.

Kershaw's most recent Report Cards indicate that approximately half of their students are proficient in ELA and Math. However, their proficiency scores are consistently and significantly lower for Black, Disabled, Multilingual Learners, and Pupils in Poverty. Offering a high-quality school choice to Kershaw County will provide parents with a learning model that the county does not currently offer. Further details to substantiate these findings about schools that serve the Kershaw community and the Florence, Orangeburg, Laurens, and Newberry communities are provided in Appendix G - Demographic Data of Targeted Counties.

Ethos Academies will open in Kershaw for the 2024-2025 school year and will open another four schools in rural communities using the same model as the Kershaw campus. Those communities include Florence, Orangeburg, Laurens, and Newberry. Data regarding the current proficiency levels of schools serving these communities can be found in Appendix G - Demographic Data of Targeted Counties.

### 3. Community Outreach

Starting in February and through April, Ethos Academies will participate in community meetings and conduct a social media campaign about the school and provide an update before the application interview.

### 4. Partnerships

Starting in February and through April, Ethos Academies will seek partnerships within the Camden community and define their potential role in the school.

### 5. Public Support

The Ethos Academies Planning Committee has begun initial conversations with community members, parents, and leaders who are potential

supporters of the committee's mission for opening public charter schools in rural, underserved communities throughout South Carolina. After submitting this application, the Planning Committee will continue those conversations to confirm partnerships and develop relationships within the community that will serve students, families, and the larger community.

The Planning Committee will begin a series of community outreach efforts in February, continue to and beyond the capacity hearing in April, and bring evidence of support at that time. The evidence will include a notarized letter certifying that the school has secured at least 250 names of families committed to enrolling their students at Ethos Academies and letters of support from local businesses, non-profit organizations, and local leaders.

We commit to fostering a partnership between parents, teachers, students, and the greater community to create an environment where parents can engage in school activities, teachers are given the freedom to be innovative, and students are given the structure and the opportunity to learn.

Ethos Academies believes that parent engagement is vital to the academic achievement of the student population; therefore, we will create an engaging and inviting parent involvement program that will offer opportunities for them to share a meal, to be informed, or share a skill. For example, every week, parents from a certain grade level will be invited for Family Breakfast where they can eat with their child and his or her teacher; then, when the child goes to class, the parent can stay for a workshop that focuses on a topic chosen through results of a parent survey. This could include parenting skills, resume-building skills, or information on the curriculum. In addition, parents will be invited to contribute their time with the intention of making all parents feel as the vital part of the school community that they are. Some parents will have specific skills and resources to share, while other parents will not. We will endeavor to offer volunteer opportunities that suit every skill level and comfort level. Given the success that Tutelage has had in recruitment and engagement opportunities at Cherokee Charter Academy, Greenwood Charter Academy, and Libertas Academies - Boiling Springs, the school is confident that Ethos Academies will be equally successful in both areas.

#### 6. Parent Engagement

The Planning Committee will begin this work in earnest after the submission of this application and will bring evidence of support through a notarized letter certifying that the school has secured at least 250 names of families committed to enrolling their students at Ethos Academies and letters of support from local businesses, non-profit organizations, and local leaders.

#### 7. Partnerships

Starting in February and through April, Ethos Academies will seek partnerships within the Camden community and define their potential role in

the school.

#### 8. Private School

This question does not apply to Ethos Academies' application.



## Response to Instructional Model

### 1. Introduction and Summary of Educational Program

Ethos Academies is founded on the belief that the Core Knowledge Sequence, which we will utilize in full, will create a rigorous and exciting learning atmosphere that will produce effective communicators, lifelong problem solvers, and engaged and informed American citizens. We will nurture well-rounded, highly educated, successful scholars by delivering a classical curriculum through the Core Knowledge Sequence for reading, science, and social studies instruction and Eureka Math for math instruction. This curriculum is deep and comprehensive in its approach to learning, calls for cross-curricular teaching, and builds on prior knowledge, encouraging teachers to disseminate the content through instructional methods that meet the developmental needs of their scholars.

In addition, Ethos Academies will use a strong character education program, Core Virtues, to raise student performance in all academic areas. A rigorous cross-curricular approach is the only path to academic success. Ethos Academies believes that research and implementation with fidelity demonstrate that Core Knowledge, Core Knowledge Language Arts (CKLA), Eureka Math, and Core Virtues are the bedrock of education.

Alongside rigorous core-subject curricula, Ethos Academies will implement daily PE and enrichment, including Art and Music. These will be available on a rotating basis to ensure that our students can learn about and immerse themselves in other world perspectives, showing them options and interpretations, thereby freeing them to create their own ideas about the world.

Since Latin is a foundation of the English language and classical education in general, Ethos Academies will add Latin I in the 7th grade and Latin II in the 8th grade. These classes will give students high school credit to ensure that the foundational components of English are strong and give our students a head start on much-needed credits and classes.

Developing scholars with a wealth of knowledge and a depth of skills, along with the ability to adapt and apply what they know, is the measure of a successful school. Ethos Academies students will achieve academically because of our core curricula and socio-emotionally because Core Values will allow them to develop an appreciation for other people's perspectives as much as they value their own. In this way, students will feel welcome at the proverbial community table and have ideas, solutions, and actions to contribute. Providing scholars with an education based on problem-solving and the accumulation of content knowledge will prepare them well for the employment opportunities available in and beyond their community.

McKinsey's 2017 report estimates that fully 50% of current work activities have the potential to be automated by technologies by the year 2030. As a result, 400-800 million people could be displaced from their current employment in the next nine years, and the workforce will need to be retrained. We must rethink the education we provide our citizens, starting in

elementary school. We simply cannot train them in the same way we have historically trained scholars because we would be training them for careers that no longer exist. Instead of training scholars for careers involving routine skills and subject-specific knowledge, we need to ensure that they are ready for specialized training for the new economy, which will require workers who have a generalized education and can adapt as tasks change in a highly-automated labor market. Flexible and relational thinking and the ability to grow and adapt will be crucial to success in the automated world. Our job is to develop lifelong learning skills for the next generation of great American citizens.

Ethos Academies' Mission is as follows: "The mission of Ethos Academies is to continuously develop the next generation of American citizens by developing creative, problem-solving minds through the education of the whole student." CKLA perfectly aligns with our mission. Dr. E.D. Hirsch developed CKLA based on background knowledge needs and reveals America's rich history to all students. The Core Knowledge Sequence, Eureka Math, and Core Values provide all students, no matter their background, the essential knowledge and skills that they need to lead successful adult lives.

Ethos Academies will seek to mirror Kershaw County in its student population with the targeted student population, including the following percentages:

#### Race and Percent of Kershaw Population

- American Indian and Alaska Native: .5%
- Asian: .8%
- Black: 24.8%
- Hispanic or Latino: 5.4%
- Native Hawaiian and Other Pacific Islander: .1%
- Two or More Races: 2.1%
- White: 67.3%

In addition, as a public charter school, Ethos Academies understands that it must provide FAPE to all students and adjust the budget to ensure that the school provides all required services and supports.

Many schools are demonstrating positive results with the Core Knowledge Sequence. Their student populations are similar to that of Ethos Academies, including Success at Summit Classical, Belton Prep, and Cherokee Charter Academy. Please find the links to documents that further discuss the efficacy of Core Knowledge here:

-The NYC Core Knowledge Early Literacy Pilot  
<https://drive.google.com/file/d/1dDGRI4XBCyoObliZGXkQS6nZqWfVj2Bc/view>

-How Do We Know This Works?

<https://www.coreknowledge.org/wp-content/uploads/2016/12/How-Do-We->

## 2. Research-Based and Data-Driven Educational Program

For core subjects, Ethos Academies will implement The Core Knowledge Sequence, which we will utilize in full, will create a rigorous, exciting learning atmosphere that will produce effective communicators, lifelong problem solvers, and outstanding American citizens. This curriculum is deep and comprehensive in its approach to learning, calls for cross-curricular teaching, and builds on prior knowledge, encouraging teachers to disseminate the content in various age-appropriate ways. The curriculum also spirals, so scholars revisit in later years the content that they learn about in an earlier grade. The most exciting part about this is that teachers will collaborate within each grade and do so between the grade levels.

Ethos Academies will monitor scholars' progress through various formal and informal assessments. Scholars will be assessed using rubrics, traditional tests, class participation, portfolios, and homework. Teachers in the lower grades will also use running records and anecdotal evidence to provide scholars and parents with a complete picture of their progress. We will also fully participate in the state's accountability models, including all State assessments.

We will offer a rigorous, differentiated approach that gives the scholars real-world experience while building on a core foundation of knowledge that they will use in their future education. The result will be scholars who are not average or below average. Instead, they will be well-educated, culturally literate members of society who will score well above average on the state's accountability tests. Schools implementing the Core Knowledge Sequence with fidelity outperform most public schools in North Carolina (i.e., Thomas Jefferson Classical Academy in Rutherford County).

Additionally, Ethos Academies will use a strong character education program, Core Virtues, to raise student performance in all academic areas. Ethos Academies will improve all scholars' student learning and achievement results by emphasizing high academic expectations, strong character development, and individual responsibility.

## 3. Meeting and Exceeding Performance Standards and Expectations

The Core Knowledge Sequence is a "coherent, cumulative, and content-specific core curriculum" developed by the Core Knowledge Foundation, a nonprofit organization founded by E. D. Hirsch, Ph.D. professor emeritus of education and humanities at the University of Virginia. Dr. Hirsch is the author of *Cultural Literacy* (Vintage, 1988), *The Schools We Need and Why We Don't Have Them* (Anchor, 1999), *The Knowledge Deficit* (Houghton Mifflin Harcourt, 2006), *The Making of Americans: Democracy and Our Schools* (Yale University Press, 2009), and, most recently, *Why Knowledge Matters: Rescuing Our Children from Failed Educational Theories* (Harvard Education Press, 2016).

In alignment with our mission, the Core Knowledge Sequence's innovative and rigorously academic nature will improve scholar learning and achievement results. In studies, the Sequence has consistently produced scholars who score better on tests, are better prepared to address a broad range of topics, and are excited about learning. It also creates an environment of collaboration and collegiality among teachers. This excitement is infectious and helps produce scholars who become lifelong learners and voracious problem solvers.

In keeping with the standards set forth by the Core Knowledge Foundation, we have specifically chosen to teach math standards using Eureka Math. We will place great emphasis on problem-solving and solving multi-step problems. A scholar who has been trained using these methods will be better prepared to look at and solve problems from many different angles.

This curriculum aligns directly with the South Carolina College and Career Ready Standards. To succeed at Ethos Academies, scholars must be classroom leaders and strive for academic achievement through hard work and collaboration with peers. All scholars deserve a fair, equal, and all-encompassing curriculum, and the Core Knowledge Sequence is effective for all scholars. It levels the playing field for scholars of all backgrounds, including low-wealth and at-risk scholars. It has been shown that at-risk and lower academic achieving scholars generally have lower standards and expectations set for them. The Core Knowledge Sequence does not change its standards based on socioeconomic or educational backgrounds. Instead, it holds every scholar to the highest standards and expectations. In conjunction with its higher standards, this curriculum will create scholars who can achieve more and are better prepared to compete and succeed in a global society.

As the core of a school's curriculum, the Core Knowledge Sequence establishes a solid, coherent foundation of learning and embedded flexibility for meeting local needs. While the Sequence serves as the springboard to planning in each classroom, teachers align the Core Knowledge topics with state standards; then, as a school, Ethos Academies will develop a yearlong Curriculum Plan for teaching all requisite topics and standards.

The Core Knowledge curriculum is content-rich, coherent, cumulative, and context-specific. The content-rich curriculum engages students in rigorous English language arts and literacy, mathematics, history and geography, science, visual arts, and music. The content is organized coherently, so knowledge builds upon previously attained knowledge. Content and skills spiral within and through the grades. This cumulative sequencing of content is a crucial strength of Core Knowledge.

Further, we will weave the character development programs as teachers present the Core Knowledge Sequence. Teachers will use the Core Virtues

program developed by Mary Beth Klee, which focuses on the sixteen habits that create resilient lifelong learners who can communicate effectively and work collaboratively. Core Virtues focuses on these areas:

- persistence,
- finding humor,
- developing empathy,
- thinking flexibly, and
- communicating with clarity and precision.

The lessons will be integrated into the curriculum and result in a student body with a shared vocabulary, common goals, and the tools to succeed in all aspects of life.

For parents, the author of Core Knowledge, E.D. Hirsch, has also developed a book series to support their child's development based on their grade level. For example, beginning in Kindergarten, parents can read What Your \_\_\_\_\_ Grader Needs to Know to guide at-home instruction in both academic and socio-emotional lessons.

#### 4. Adapting the Curriculum and Instruction To Meet the Needs of All Students

Every teacher, staff, and administrative member is dedicated to the success of every Ethos Academies scholar. We believe that all scholars are "at-risk" of falling behind academically and socially. Therefore, Ethos Academies' leadership will use all available resources and tools to ensure that each child receives a strong foundation for their future. We believe every child shall have the opportunity to succeed in every class, every day.

Ethos Academies will implement a progress monitoring intervention system for all scholars utilizing research-based programs that indicate academic deficiencies. Along with the expertise of teachers and other personnel for early identification of scholars who are "at-risk," the primary prevention level includes high-quality instructional practices and implementation of the Sequence with fidelity.

The middle level includes moderate-intensity evidence-based intervention(s) using skills-based instructional tools. Through collaborative efforts, L will implement multiple tiers of increasingly intense instruction/intervention services to support scholar academic proficiency. Teachers will match scholars who need remediation or intensive instructional support with strategic and intensive instruction/interventions based on screening, progress monitoring, and diagnostic assessments.

To ensure scholars do not miss core subject instruction, Ethos Academies will conduct interventions during specific times of the school day, and, if needed, a Saturday Academy. Progress will be monitored through a consistent evaluation process (i.e., timed probes) at a minimum each month. If there is no progress after four weeks of intervention, Ethos Academies will evaluate the intervention implementation for fidelity and consider intensifying intervention time.

The schools will develop a scholar support team composed of our best classroom teachers, instructional coaches, and administrators to collectively brainstorm interventions and solutions to promote scholar success. In addition, we will continue to analyze our school schedules, curriculum, and instructional strategies to foster a more robust learning environment and ensure our teachers have a complete toolbox of strategies to address any issues. We will provide professional development around grammar/word walls, verb tense studies, vocabulary frames, and markup methods.

In addition, we will train the educators on accelerating the development of critical literacy skills, such as reading, writing, and vocabulary, primarily through instruction in specially designed language proficiency standards. Ethos Academies will monitor student progress in language acquisition throughout the year and share the resulting data with parents. Teachers will be trained on using the Assessment and Remediation Guide within CKLA to monitor and provide appropriate support for language acquisition and growth.

All children will participate in multiple formal assessments to establish a baseline and personalized education plan. We will utilize NWEA MAP Assessments for progress monitoring and common formative assessments developed by our teachers. Through our Tutelage School Solutions partnerships, teachers will master the processes of effectively collecting, analyzing, and collaborating to make effective decisions for children.

#### 5. At-Risk Students

Annually, as adopted in Ethos Academies policy, the schools' requirements for promotion will be evaluated by each grade level and the schools' Directors to create a culture of rigor high achievement opportunities for all. Ethos Academies will communicate these requirements to parents and scholars throughout the academic year.

Because of the Sequence's intentional development towards scholar mastery, the sequential building of knowledge will provide a clear path for all teachers to assess and analyze any potential gaps that so often characterize current education.

Ethos Academies will utilize nationally normed, standards-based formative assessments from NWEA at least three times per year. The data derived from these assessments will guide conversations with children and families regarding the scholar's strengths, opportunities, and specific concepts to master for promotion. Ethos Academies has designed our instructional program to accommodate children with different learning capacities.

The primary purpose of the proposed schools is to increase learning opportunities for all scholars. The educational program, instructional plan, and promotion requirements are designed to successfully transition each

scholar to the next grade. The comprehensive curriculum plan will prepare scholars academically through a rigorous and relevant curriculum and ensure that scholars have appropriate personal/social skills.

Teacher professional development will focus on techniques for delivering the Core Knowledge Sequence in a way that elicits both excitement and a sense of ownership on the part of the scholars. This development plan calls for a three-year, in-depth professional development series that will take teachers from understanding the tenets of the Core Knowledge Sequence to being true collaborators and creators of content-rich units. Teachers will also learn to act as facilitators of learning, guiding scholars to discover truths through kinesthetic, auditory, and visual learning.

To assist teachers with the continual improvement of their instructional practices, Ethos Academies will hire an instructional coach who will provide teachers with the necessary training and coaching in Core Knowledge, Core Knowledge Language Arts, Eureka Math, and a variety of instructional delivery methods. The coach will also work side-by-side with the teachers to model lessons, increase content and skill retention, increase rigor, and develop a learning environment conducive to growth throughout the school year.

We will also offer summer learning opportunities. These opportunities will include supplemental reading programming for our 3rd graders who are not proficient readers.

#### 6. High School Grades

This does not apply to the Ethos Academies - Kershaw application.

#### 7. Replication Schools

This does not apply to the Ethos Academies - Kershaw application.



## Response to Educational Structure

### 8. Unique Features

The unique features of Ethos Academies include a longer school day (7.5 hours vs. traditional 7 hours, students will attend from 8 am until 3:30 pm), a focus on content knowledge, and the skills necessary to use that knowledge, everyday PE, Music or Art every day, and character education.

At Ethos Academies, students will participate in daily Core Virtues lessons, a practical, non-sectarian approach to character education from kindergarten to sixth-grade level. Teachers highlight a critical intellectual, moral, or civic virtue each month, such as respect, responsibility, diligence, honesty, generosity, or perseverance. Another difference includes the schoolwide policy of no homework, and that Ethos Academies will have a small school feel with four classes of 25 students each for grades K-2 and three classes of 25 students each for grades 3-5.

### 9. Grade Levels

Ethos Academies will open grades K-5 with 700 students, with 100 students per grade. We will roll up a grade each year for three years until the school is fully enrolled with students in grades K-8.

### 10. Size at Full Capacity

At full capacity, Ethos Academies - Kershaw will enroll 900 students in grades K-8. Ethos Academies' first facility will serve 700 students in grades K-6. Whether on the same campus or another campus, Ethos Academies will complete a second building at the end of year 3. Each grade will ultimately have four sections, with 25 students in each class.

### 11. Basic Learning Environment

We aim to recruit the best connectors and content educators for each teaching position. Ethos Academies' teacher : student ratio is 18:1, allowing all teachers to learn each scholar's strengths and weaknesses, helping them be more effective when designing class-based instruction and independent study projects.

In keeping with the school's philosophy, Ethos Academies will equip all classrooms with manipulatives and materials appropriate to the lesson being taught. Teachers within grade levels will collaborate on lesson preparation and classroom set-up. Classrooms will be arranged so scholars feel a sense of order and purpose. Displays will be presented in such a way as to complement, not compete with, the instruction being given. All materials will be ready for exploration and manipulation as determined by the day's lessons.

### 12. School Day and School Week Structure

The school day for scholars will run from 8 am until 3:30 pm. Teachers will arrive at 7:30 am and remain at work until 4:00 pm, which comprises a 42.5-hour work week. Non-instructional positions will have a 40-hour work week. The PE, Music, and Art Instructors will be placed with different grade levels from 9:00 am to 9:55 am each day to assist with needed instruction

and remediation. The Music and Art Instructors will collaborate with classroom teachers to determine which classes need additional work on extra days each month.

13. Optimizing Student Learning and Supporting the School's Mission  
As a "coherent, cumulative, and content-specific core curriculum," The Core Knowledge Sequence is in alignment with our mission because it will bring about results in improved student learning and achievement results called for in Ethos Academies' mission statement. By better equipping our scholars, they will have the critical thinking skills and the requisite skill set to not only perform all grade-level tasks but to also apply what they've learned in school to the world outside of school.

The Core Knowledge Sequence has been shown to be effective for all scholars and creates an educational environment that welcomes and meets the needs of scholars of all backgrounds, including low-wealth and at-risk scholars.

#### 14. Average School Day: Student

Because of the innovative instructional techniques that challenge scholars at every level of proficiency and character education, Ethos Academies create learning environments that inspire the individual to develop into the best possible version of themselves while learning the right action that the group does can be successful. With the addition of everyday PE and music or art education, we are offering programming that will spark the interest of every child in at least one extracurricular area, provide daily opportunities for exercise, and provide inspiration that correlates to their core subject areas.

#### 15. Lesson Planning Process

Teachers will deliver high-quality lesson plans to the administration weekly. To support teachers in this process, the school will provide teachers with professional development workshops that will focus on techniques for delivering the Core Knowledge Sequence in a way that elicits both excitement and a sense of ownership on the part of the scholars. This approach involves working with teachers to understand the tenets of the Core Knowledge Sequence and assisting them in being true collaborators and creators of content-rich units. Teachers will also learn to act as facilitators of learning, guiding scholars to discover truths through kinesthetic, auditory, and visual learning.

To assist teachers with the continual improvement of their instructional practices, the school will provide on-site support with an instructional coach. The instructional coach will provide teachers with the necessary training in Core Knowledge, Core Knowledge Language Arts, Eureka Math, and various instructional delivery methods. The coach will also work with the teachers to model lessons, increase content and skill retention, increase rigor, and develop a learning environment conducive to growth.

To that end, we will provide teachers with the following levels of support:

- Focused and specific instructional coaching of educators in strategies, pedagogy, behavior management, and best practices.

- Professional development, tailored to the needs of each staff from Core Knowledge to CKLA to rigor to behavior management to data analysis.

- Two planning periods per day, per classroom teacher, with one of those planning periods aligned with every teacher on that grade level.

#### 16. Typical Day: Teacher

The school day for scholars will run from 8 am until 3:30 pm. Teachers' work days will run from 7:30 am until 4:00 pm, comprising a 42.5-hour work week. Core Virtues will start each school day and run for 20-30 minutes. CKLA will then be taught across all grade levels until approximately 10:20. The remainder of the day will be made up of PE (45-minute period), Math (115-minute average), rotating Music or Art (45-minute period, over ten school days, five periods of Music and five periods of Art), Lunch (30-minute period), and a final 30-45 minute period for data-driven review groups. We will not give homework in grades K-5 but will encourage 20 minutes of leveled reading of each scholar's choice each evening.



## Response to Professional Development 17. Responsible Position

The person responsible for overseeing the professional development of teachers will be the School Director, who could delegate portions of that responsibility to the Instructional Coach and/or lead teachers. Tutelage School Solutions will also have outside school individuals assess all data streams.

## 18. Professional Development Plan: Core Components

Teacher professional development will focus on techniques for delivering the Core Knowledge Sequence in a way that elicits both excitement and a sense of ownership on the part of the scholars. This development plan calls for a three-year, in-depth professional development series that will take teachers from understanding the tenets of the Core Knowledge Sequence to being true collaborators and creators of content-rich units. Teachers will also learn to act as facilitators of learning who guide scholars to discover truths through kinesthetic, auditory, and visual learning.

In addition to the aforementioned professional development opportunities, teachers will participate in the Great Minds Conference and Teach Like a Champion workshops in person if available.

Ethos Academies will ensure that all curriculum maps ensure that all SC College and Career Ready Standards are taught by providing educators with focused and specific instructional coaching in strategies, pedagogy, behavior management, and best practices. Teachers will also be given two planning periods per day, with one of those planning periods aligned with every teacher on that grade level.

## 19. Professional Development: Schedule and Explanation

Ethos Academies will provide 12 days of professional development for teachers and support staff to provide the necessary skills and understanding they will need for the new year. Here is a brief description of the topics and times of our professional development offerings:

- Core Knowledge and CKLA: 3 full days.
- Eureka Math: 2 days.
- Core Virtues: 1 day.
- Teach Like a Champion Classroom Management: 1.5 days.
- School Policy and procedures: 2 days.
- First Aid: .75 days.
- School Director discretion: 1.75 days.

## 20. Number of Days/Hours for Professional Development

Each teacher will have two 45-minute planning periods per day; one of those periods will align with all other teachers in the same grade. In addition, there will be a half-day of school every 4.5 weeks. Ethos Academies will tailor professional development to provide support in the areas where data indicate that additional training is needed. The half-days total four full days each school year.

### 21. Professional Development Alignment

The professional development offerings align with Ethos Academies' educational plan (CK, CKLA, Eureka Math, and Core Virtues). Ethos Academies will evaluate professional development through data derived from assessments and teacher evaluations. Teachers will have common planning times each day and will be expected to work together to develop rigorous lesson plans that meet the individual needs of their students. Grade-level teachers will have two meetings per week with one of those meetings with the Instructional Coach and/or School Director. Collaboration is vital in instructional timing and developing and practicing strategies to provide the instruction scholars need to achieve academically.

### 22. Facilitation

Times are suggested for full implementation with fidelity for Core Knowledge, CKLA, Eureka Math, and Core Virtues by grade as provided by the developers of each of the named programs. Ethos Academies' schedules will include every minute recommended by the curricula developers and allow for time spent on programming that will meet the unique needs of the Kershaw community, such as everyday PE, instructional coaching, and art and music instruction.

### 23. Replication Schools

This question does not apply to the Ethos Academies - Kershaw application.



## Response to Serving Students with Disabilities

### 1. Types and Size of Special Populations

Every teacher, staff, and administrative member is dedicated to the success of every Ethos Academies scholar. We believe that all scholars are "at-risk" of falling behind academically and socially. Therefore, Ethos Academies leadership will use all available resources and tools to ensure that each child receives a strong foundation for their future. We believe every child shall have the opportunity to succeed in every class, every day.

Ethos Academies will implement a progress monitoring intervention system for all scholars utilizing research-based programs that indicate academic deficiencies. Along with the expertise of teachers and other personnel for early identification of " at-risk " scholars, the primary prevention level includes high-quality instructional practices and implementation of the Sequence with fidelity.

The middle level includes moderate-intensity evidence-based intervention(s) using skills-based instructional tools. Through collaborative efforts, Ethos Academies will implement multiple tiers of increasingly intense instruction/intervention services to support scholar academic proficiency. Ethos Academies will match scholars needing remediation or intensive instructional support to strategic and intensive instruction/interventions based on screening, progress monitoring, and diagnostic assessments.

To ensure scholars do not miss core subject instruction, Ethos Academies will implement these interventions shall occur during specific times of the academic day, possibly extended school, and, if needed, a Saturday Academy. Ethos Academies will monitor progress through a consistent evaluation process (i.e., timed probes) at a minimum each month. If there is no progress after four weeks of intervention, Ethos Academies will evaluate the implementation for fidelity and decide to modify the intervention time or elements of the intervention.

The schools will develop a scholar support team composed of our best classroom teachers, instructional coaches, and administrators to collectively brainstorm interventions and solutions to promote scholar success. We will continue to analyze our schedules, curriculum, and instructional strategies to foster a more robust learning environment and ensure our teachers have a complete toolbox of strategies to address any issues. We will provide professional development around grammar/word walls, verb tense studies, vocabulary frames, and markup methods.

In addition, we will train the educators to accelerate the development of critical literacy skills such as reading, writing, and vocabulary through instruction in specially designed language proficiency standards. Ethos Academies will monitor students' progress in language acquisition throughout the year, and the information obtained will be shared with parents. Ethos Academies will provide training to teachers on using the Assessment and Remediation Guide within CKLA to monitor and provide

appropriate support for language acquisition and growth.

All children will participate in multiple formal assessments to establish a baseline and personalized education plan. We will use NWEA MAP Assessments and Edgenuity for progress monitoring and common formative assessments developed by our teachers. Through our Tutelage School Solutions partnerships, teachers will master the processes of effectively collecting, analyzing, and collaborating to make effective decisions for children.

Regardless of their unique needs, each scholar deserves the chance to grow and learn in a safe, engaging, and rigorous environment. Scholars with disabilities will receive all services required by their Individualized Education Plan (IEP). However, these same scholars still need to be exposed to the rich content within the Core Knowledge curriculum. The classroom and EC educators will work together to ensure that the Core Knowledge content will be delivered in a modified form so that students with IEPs are still exposed to the knowledge within the curriculum.

Ethos Academies will provide educational opportunities to scholars with disabilities in the least restrictive environment with the full continuum of alternative placements, as appropriate. At least one Exceptional Children's teacher on staff will implement IEPs and monitor scholars' progress. In the Kershaw County School District, 506 girls and 913 boys are in special education and receive related services through IEPs under the coverage of the IDEA, 2004, for the 2020-2021 school year as reported in Child Count and on the SC Department of Education website.

This represents 13.04% of the 10,853 Total Enrolled Student population as reported on the Kershaw County School District Website. We anticipate that our enrollment will reflect a minimum of 13.04% of students in special education and related services and a maximum of 28.19% because of the Child Find Demographic Summary for the 2020-2021 school year for students aged 3-21. In that report, Kershaw County School District reported the following categories for Children with Disabilities:

- Autism Spectrum Disorder: 10.6%
- Deaf and Hard of Hearing: 1.3%
- Deaf-Blindness: 0%
- Developmental Delay: 8.1%
- Emotional Disability: 1.5%
- Intellectual Disability: 6.69%
- Multiple Disabilities: 0%.

Whether Children with Disabilities reflect 3.4% or 14.37% of our total enrollment, Ethos Academies will ensure a Free and Appropriate Public Education as required by their IEPs and will work to identify all students needing special education who have not yet been identified.

## 2. Meeting Diverse Needs of Special Populations

Classrooms will be equipped with the necessary materials to ensure access to the curriculum. Specially designed instruction will be provided to each student as defined by their individual education programs.

Quarterly, the EC teacher will meet with scholars' classroom teacher(s) to discuss progress and determine if a parental meeting is necessary. On an annual basis, parents, the EC teacher, one regular education teacher, a school administrator, and an individual who can interpret any evaluation data will meet to review the scholar's IEP and make any necessary changes or recommendations. Parents may request an IEP meeting at any time.

The school will hire and/or contract any necessary to meet the needs of all students with disabilities to provide a Free Appropriate public education FAPE and will add contracted staff or hire part- or full-time employees according to all student special populations' needs.

#### Multilingual Learners:

To ensure that all students are screened as Multilingual Learners, Ethos Academies will request the records of every enrolled student; the records request will include the student's home language survey. The school will conduct a new home language survey when the student is enrolling for the first time in a public school and will assign a staff member available to handle all referrals for the Multilingual Learner Program.

To ensure that every Multilingual Learner receives individualized and expert instruction, the school will employ a Multilingual Learner-certified staff member to administer the WIDA and work with teachers to identify the appropriate means of instruction and modifications and/or accommodations. Ethos Academies will follow all procedures as established by the sponsor and SC Department of Education for Multilingual Learners.

In coordination with the Multilingual Learner-certified staff member, teachers will work to differentiate and individualize lessons for Multilingual Learners. The school will secure and ensure that teachers have access to appropriate materials to meet the needs of Multilingual Learners and ensure that they can meet grade-level proficiency standards.

In the classroom, teachers will provide instruction that builds on social and academic performance, which is essential for students who are learning a second language. We will intentionally create opportunities for cooperative learning and clear communication for Multilingual Learners. Doing so helps the students become comfortable and not feel isolated. It also helps to reduce the stress those students sometimes feel when learning a second language.

Partnering them with other students helps to provide an opportunity to advocate for themselves with the assistance of someone with whom they

are familiar. Again, tending to their social and emotional needs gives them the hope and confidence to be successful.

Teachers will be trained on the Sheltered Instruction Observation Protocol (SIOP). SIOP is a research-based instruction model used to assist Multilingual Learners. Teachers use SIOP to address the academic and linguistic needs of students. Some of SIOP's components are building background knowledge and providing practice and interaction. In turn, each identified student will be taught with SIOP, leading to high achievement and their ability to perform well on district and state assessments. Furthermore, the school will incorporate visuals and active prior knowledge within instructional delivery.

#### Gifted and Talented Students:

Ethos Academies will adhere to the state standards for defining and identifying Gifted and Talented students. To that end, students will be identified using a standardized assessment (CoGat) at the end of 2nd grade. The Core Knowledge curriculum is structured to support advanced learning and differentiation, which allows individual students to advance within the bounds of the regular classroom.

In addition, Gifted and Talented students will participate in enrichment for 30 minutes a day during the school-based enrichment period. Teachers will collaborate to create high-performance lessons engaging the learning in deep critical thinking, which is essential for Gifted and Talented students. Gifted and Talented students must be engaged in analysis, evaluation, creative synthesis of data and information, and generating new ideas; therefore, Ethos Academies teachers will work on challenging them in these areas.

#### Migrant Students:

Ethos Academies recognizes the unique challenges that many migrant students face, including mobility, language barriers, poverty, and social-emotional concerns. To address these issues, Ethos Academies will take steps to acclimate every new child at Ethos Academies, address language challenges through the Multilingual Learner Program, provide access to enrollment opportunities for low-income families, and fully engage the MTSS process to ensure their academic and social-emotional success.

#### Homeless Students:

Ethos Academies recognizes that homeless students, whether they are homeless when they enroll or they become homeless while enrolled at Ethos Academies, have unique challenges. It is the school's responsibility to ensure that those challenges don't prevent the student from a FAPE.

Ethos Academies will take all necessary steps to ensure that the student does not experience a disruption to his or her education and provide transportation and all related services essential to ensure success at

school. This includes providing access to the same educational programs and services in the classroom as their permanently housed peers and the same access to early intervention, tutoring, counseling, before- and after-school programs, extracurricular programs, and state and local food programs.

#### Students of Military Families:

Ethos Academies understands that students of military families have experienced changes in schools, peers, health care professionals, and religious institutions and, due to those changes, bring with them challenges and assets. They will benefit from a welcoming school environment where any skill or social-emotional gaps will be met with understanding and developmentally appropriate instruction.

The school will implement the guiding principle included in the Military Child Education Coalition, which includes:

1. Fostering awareness and understanding of the experiences of military-connected students.
2. Preparing educators to meet the social, emotional, and learning needs of military-connected students.
3. Creating environments responsive to the social, emotional, and learning needs of military-connected students that honor military families.

#### 3. Providing a Continuum of Services

Ethos Academies will ensure that all scholars with disabilities have access to free and appropriate public education and that a continuum of services is provided to all students with disabilities. We will focus on their special education and related services needed to ensure that they acquire the best possible education and are being prepared for further education, employment, and independent living. We will follow all federal and state laws and regulations regarding the education of scholars with disabilities. All staff will be educated about the contents and implications of these laws.

We will contract with appropriate related service providers, including occupational, physical, and speech therapists. Global Teletherapy is one such service provider that one of our sister schools successfully uses. Global Teletherapy is willing and able to go into a client-based relationship with Ethos Academies. If Ethos Academies enrolls students who are eligible for one or more of Global Teletherapy's services, an agreement will be completed at the time of enrollment. Ethos Academies desires to provide Special Education services in-house as much as possible.

Ethos Academies has built remediation time into the school day, so all children will have access to remediation if their families cannot provide transportation for before- or after-school support opportunities. If children need additional access to remediation outside of the school day, Ethos Academies will work with our after-school provider to ensure that students receive skill-based remediation from adequately trained staff. The school will also provide transportation for families whose children are in need of

remediation but aren't able to provide transportation themselves for after-school care.

#### 4. Roles and Responsibilities

As allowed, Ethos Academies will partner with sponsors to provide for the needs of scholars who are members of a special population. The responsibility for ensuring access to FAPE within the least restrictive environment lies with Ethos Academies. At the same time, the actual services would be provided in collaboration with the sponsor and/or outside service providers with whom Ethos Academies selects as partners. Ethos Academies understands that its South Carolina sponsor is the LEA and will comply with all policies and procedures as required by law.

## Goals, Objectives, and Assessment Plan

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## Response to Goals, Objectives, and Assessment Plan

### 1. SMART Goals

Ethos Academies' goals have been adopted with a five-year vision to be the highest-performing public school of choice within each county in which we serve students. Also, the Planning Committee developed goals that would ensure the academic, operational, governance, and fiscal success of the school.

#### Academics:

-By 2026, the percentage of proficient scholars in grades 3 - 8 who are proficient will be at least 20 percent over the district average.

-Ethos Academies will meet or exceed academic growth annually.

-Our subgroups' (ELL, EC, FRL, African American, and Hispanic) academic achievement gap will decrease by 5% each year per subgroup (Overall school proficiency in an area vs. subgroup proficiency).

#### Specific Academic Objectives:

-Establish clear prevention and intervention plan within the first 30 days of school that identifies scholars performing below grade level.

-Establish a successful tiered education program that provides specific strategies and content to scholars performing below grade level (month 6).

-Have an annual curriculum and instruction audit performed by the Core Knowledge experts to enhance teacher delivery and development.

#### Enrollment:

-The school will meet annual enrollment goals based on the first five-year ADM projection. Our goal is to secure 825 applications for enrollment to achieve our Year 1 goal of serving 700 scholars.

-Our annual scholar attrition rate will decrease annually to be less than 10% in years one and two.

#### Parent Satisfaction:

-According to survey data, our parent and family satisfaction scores will remain above 95%.

#### Finances:

-Ethos Academies will build a cash surplus of \$400,000 by year 2.

#### Governance:

-The Ethos Academies board will participate in four hours of professional development annually.

-Ethos Academies will also participate in professional development opportunities provided by the Authorizer.

#### Communication:

The school leader will regularly report student academic progress to the Ethos Academies board with his or her plan to implement changes as necessary. This will include personnel changes, including shifting the Instructional Coach's time to provide additional support to teachers with students who are not consistently proficient in reading or math and considering additional instructional supports, such as professional development, teaching tools, or outside experts.

The board will adopt a strategic outcomes-based calendar to allow the board to provide substantial oversight to the school. All organization goals adopted by the board will have specific deliverables (adopted into policy) that will inform the board of the school's progress toward attaining its mission, vision, and goals. These monthly reports will be available electronically to the general public. In addition to monthly board reports, Ethos Academies will provide an annual report to families, stakeholders, and community partners disseminating the state of Ethos Academies. Furthermore, Ethos Academies will inform parents about the school's progress monitoring, scholar progression, and reporting processes that include progress reports (minimum quarterly) that are instructional skills specific and parent-friendly.

On an annual basis, Ethos Academies will ensure that it meets or exceeds academic growth. Ethos Academies will conduct benchmark testing with NWEA MAP a minimum of three times each school year to understand which Standards have been learned and which Standards need to be re-taught to allow students to achieve mastery. Teachers will use the data to direct their lesson planning, small group instruction, and individualized instruction to ensure that all students consistently progress academically.

Test results will be published with parents, board members, and stakeholders as they become available. Formative NWEA MAP assessments will be shared with the board three times a year, at the close of each testing period. Ethos Academies administration will communicate the data concerning State assessments to the governing board, parents, and other stakeholders yearly. Further, a "State of the School" will be published each fall. The school's lead administrator and the governing board will share with parents and other community stakeholders the school's achievement and strategic planning. This document will provide those concerned with knowledge of where the school has been and a vision of the school's future.

The school will implement MTSS to provide a framework for ensuring student success. In addition, the Special Education teacher/coordinator will train staff and faculty at the beginning of the year to ensure everyone understands and can fully implement the process.

## 2. Summarized Data

For the Kershaw County School District, the percentage of students who

met or exceeded grade level expectations on SC Ready English Language Arts was 47.4% for the 2021-2022 school year. For Math, it was 33.7%. Ethos Academies aim to be a high-performing public school serving the Kershaw community.

Kershaw County School District had a Chronic Absenteeism Rate of 20% for the 2021-2022 school year, which is up from 7.7% during the 2020-2021 school year. This includes any student in grade K-12 who misses fifty percent or more of the instructional day for any reason for ten percent (or more) of the enrollment period. With Ethos Academies' intense focus on character development and an increased focus on bridging the gap between home life and school life, Ethos Academies' goal is to drastically decrease the chronic absenteeism rate.

### 3. Strategies

The governing boards of Ethos Academies will be integrally involved in assessing how the program meets the school's mission. As part of the planning year process, the board will work with the lead administrator and collaborate with the school's EMO (i.e., Tutelage School Solutions) to ensure the school's alignment toward achieving the adopted goals. This process will entail the development of an outcomes-based board calendar and strategic plan for approval by the Board that provides specific action to achieve each performance goal.

The boards will receive ongoing resources, recommendations, support, and training from The Charter Institute at Erskine, Tutelage School Solutions, and other governance experts made available to the organization.

To provide effective oversight, the board will appoint committees that measure and analyze the school's desired outcomes around Academics, Finances, Operations, Development, and Governance. Committee members may include board members, parents, community members, field experts, and teachers. Each committee will have specific roles and responsibilities to analyze the deliverable data from the operational oversight and program evaluations. The school's goals (previous section) will be assigned to specific committees for oversight, data analysis, and solutions to identified issues. Committees will analyze evaluation data to identify trends; flag unacceptable results; and make adjustments to the education plan, curriculum, instructional methods, and school operations as necessary.

According to the outcomes-based board calendar, the committees will provide specific scheduled reports (seven days in advance) to the board. These reports and strategic questions will drive the discussion and board action to navigate the organization toward its mission. The lead administrator will be responsible for developing plans of action and solutions. Some actions may require board approval (i.e., curriculum, staffing, academic calendars).

Ethos Academies will also gauge mission success by demand within the community for spaces in the school and its overall organizational health. The School Directors will keep the boards apprised continuously of the number of scholars enrolled and the number of scholars on the waiting list. Scholars, parents, and community members will be encouraged to share observations with the School Director, formally during a yearly survey process and informally, as concerns and suggestions arise. The School Director will report the results of this survey at the first regularly scheduled board meeting after the survey's close. Other suggestions and concerns will be communicated as the need arises. In addition, the board will analyze data annually to determine organizational health through school community surveys, student attrition data, teacher turnover, and partnership feedback.

#### 4. Assessments

Educators will use NWEA MAP data to plan laser-focused and specific lessons for scholars based on their individual needs to ensure that each scholar can grow, learn, and achieve. NWEA MAP data can be used to ascertain the exact state standards and skills that each scholar needs to master to be able to grow along with the RIT bands within NWEA. Using the Classroom Breakdown Grid and the Learning Continuum within the NWEA MAP portal, scholars can be provided with individual and small group instruction, allowing the educator to differentiate instruction. This approach ultimately creates a scaffolded form of instruction where skills are built upon.

High-level MAP data can and will be used to drive developmental grouping within and even amongst grade levels, further ensuring targeting needs and aligning levels. This same data can be used to report to the board and hold the school leader/leadership team accountable for growing the scholars at 1.5 years or more, according to the 2015 NWEA MAP Progress Assessment Normative Scores.

Edgenuity (formerly known as Compass/Odyssey Learning) is an educational software directly linked to a scholar's performance on the NWEA MAP Progress Assessment. Each scholar's "backpack" is filled with interactive lessons, activities, and assessments at each scholar's RIT range. Educators can manipulate the "backpacks" by adding items either below or above a scholar's level in addition to the "on-level" materials already there. Edgenuity is a powerful tool to build background knowledge for scholars and enrich what they already know. Regardless of a scholar's RIT level, they can each be pushed towards achieving mastery of skills.

#### 5. Plan to Monitor Progress

Teachers will be given professional development and common planning time to horizontally and vertically articulate to create common assessments and checks for understanding across grade levels. These assessments and checks will align with the Core Knowledge curriculum, the Core Knowledge Language Arts program, and Math standards, aligning with the South Carolina state standards. These assessments and checks will measure all

scholars on what they must learn, know, and do; these assessments will give the educators data to either remediate or enrich based on the results.

With the implementation of MTSS, teachers will carry through the three-tiered system to ensure that all scholars receive the instruction they need to make continued progress toward performing on grade level in all core subjects. First, all scholars will be provided Tier 1 instruction. Next, teachers will provide Tier II instruction for scholars who score below expectations in one or more critical areas. This approach provides additional instruction designed to supplement, enhance and support Tier 1 for scholars. Finally, Tier III services will be offered to scholars who are not showing sufficient progress in Tier II. Tier III services include intensive, individualized interventions and supports.

To ensure that parents and employees are involved with the school, Ethos Academies will focus on clear and consistent communication. The school will use a multi-format communication tool that allows the school to send messages, voice calls, texts, and emails. This will be done on a persistent basis since consistent and brief communications are proven to be the most effective way of engaging all people, including families. The communication will come from the school leader, but teachers will be very regular in their communication to families. Teachers will share things to show that this is a team atmosphere and that parents are just as important and involved as the students and staff.

Teachers will be encouraged to build an open relationship with families, so the students' support team is broad and deep. The communication will be 2-way as teachers will ask families to share information about the students so the team is aware of home support and dynamics and events that could impact the student's school life. Parents will have the option to "join in" set up by the school leadership and the teacher. Parents are more likely to "join in" when that door is open and inviting. Communication between the school must be overwhelmingly positive. Issues, of course, arise and will be communicated promptly, but if the communication is primarily positive in nature, the staff and families are much more likely to stay engaged. This direction will be led and modeled by our School Director.

#### 6. Resources Needed:

Computers equipped with Edgenuity's software will serve as the teacher's primary resource for assessing scholar achievement. Along with the instructional coach and the school director, this team will analyze and interpret data to create lesson plans that ensure that scholars are taught materials that will result in grade-level proficiency. Teachers will be responsible for communicating the achievement data to parents. The school director will be responsible for communicating the school's overall achievement data to both the parents and the board of directors.

#### 7. Replication Schools:

This question does not apply to the Ethos Academies - Kershaw

application.



## Response to Governing Board

### 1. Planning Committee

The Planning Committee for Ethos Academies is a diverse, accomplished group. It includes the following members:

-Dr. Geoffrey Alpert: An Affiliate Professor with the South Carolina School of Law, Dr. Alpert has dedicated his career to the criminal justice system as a university professor and researcher in multiple states, including South Carolina, Florida, Colorado, Texas, Washington, and Georgia. He is currently developing a Police Pursuit Policy and Training for the Police Executive Research Forum in Washington, DC and will serve Ethos Academies well in ensuring the safety of every student and staff member. He earned a Bachelor's and Master's degree from the University of Oregon and attended law school there as well. Subsequently, he earned a Ph.D. from Washington State University.

-Mr. DuJuan Council: A former board member at SC Whitmore School and an alumni of Camden High School in Kershaw County, Mr. Council serves as a Gang Investigator with the Orangeburg County Sheriff's Department. He studied Law at South University and Elementary Education at Claflin University. He resides in Kershaw County.

-Mr. Ben Trammel: Helping educational institutions modernize their document management, print customization, E-forms and workflow automation with cloud-based Enterprise Content Management solutions, he is a Southeast Region Sales Executive with Softdocs. He earned a Bachelor's of Science degree in Marketing from the Wilbur O. and Ann Powers College of Business at Clemson University and a Master's of Business Administration, Entrepreneurship. He resides in Richland County.

-Dr. Josie White: A lifelong learner with a passion for teaching and helping others, she is the Supervisor of Curriculum and Content at SC Whitmore School. She has the opportunity to work with teachers to provide tailored instruction to students to help them reach mastery of skills. Most of her career has been spent teaching high school English, but she has always loved curriculum and the science of instructional design. She constantly seeks new, exciting ways to make learning fun and engaging for students and teachers. She holds a Bachelor of Arts in Secondary Education (English) from Clemson University, a Master of Arts in Curriculum and Instruction from Saint Xavier University, and a Doctorate of Education in Curriculum and Instruction with a concentration in Administration from the University of South Carolina. She resides in Charleston County.

-Ms. Leslie Wilson: A Senior Vice President with The Cornerstone Project, she is the owner of Delta Consulting Services and is a community consensus builder experienced with organizational management, building strategy, creating supportive operational objectives, and delivering results. Strong discipline around execution and moving initiatives and strategy from conception to implementation. Proficient in all aspects of organizational support from hiring, staff development, budget development, data collection

and oversight, to creating programs and services, and managing strategic partnerships on federal, state, and local levels. Dr. White is a CARF consultant/advisor and a frequent speaker. She holds a Bachelor's of Science degree in Physical Education from Benedict College and a Master's of Arts in Rehabilitation Counseling from South Carolina State University. She resides in Sumter County.

## 2. The Decision to Form a School

This group of individuals came together in an attempt to bring academically rigorous school choice to all students in the Kershaw County community and throughout South Carolina's rural communities.

## 3. Governance Model

The Planning Committee understands that the Board of Directors does not carry out management roles or responsibilities. However, we function as a team of like-minded, skilled community members who are responsible for the school's overall success and failures. We make decisions based on the provided information and what is best to move the organization toward its ultimate vision and goals.

Our key responsibilities are to work with our EMO, Tutelage School Solutions:

1. To ensure the school's academic program is successful, measured by both internal and external assessments;
2. The school's operational programs are faithful to the terms of its charter, including compliance with statutory and regulatory requirements; and
3. The school is a viable organization, which includes, among other things, that it is financially solvent and has competent and professional staff.

Before Ethos Academies opens, the board's primary responsibilities will be working with our EMO, Tutelage School Solutions, building solid relationships in the community, recruiting families, and ensuring our facility will provide a safe and secure learning environment. We will establish engaged committees and partnerships that will embrace and enhance the school's mission and offer strict financial oversight, as called for by a fiduciary responsibility to the school. Once the school opens, we will shift from a founding board to a governing board.

The board will annually set the overall scholar outcomes; establish policy that is fair to all constituents and creates the operational boundaries; evaluate our partnership with the management company; approve substantial third-party agreements and staff contracts; set the organization's vision and goals; evaluate the effectiveness of the school's operational plans; develop a sustainable governance model that recruits effective leaders; oversee the school's finances; and grow as an organization.

Our duties as a board revolve around three words: care, loyalty, and obedience. As stewards of the charter, we must exercise reasonable care when making decisions, understand the finances, and participate in its governance. We must also attend all board and committee meetings and participate in decision-making and policy-setting while actively participating in risk assessment and strategic planning.

Our duty of Loyalty means that we will never use information obtained as a member for personal gain. We will always act in the organization's best interest by being aware of our conflict of interest policy and avoiding transactions that may result in financial gain.

Finally, our duty of Obedience ensures we will act in a consistent manner with the organization's central goals. This means we ensure the organization complies with all applicable laws and regulations and with its own internal documents and policies.

Through our EMO, Ethos Academies will recruit a School Director who leads with the highest leadership qualities. Tutelage School Solutions organization has a strong reputation for developing highly effective public charter school leaders with experience in developing high-quality Core Knowledge schools. The Ethos Academies board will approve the hiring of the School Director.

Before making our final decision regarding our School Director, we expect to spend time with the candidates in school settings, community events, and interviews to ensure this leader knows and understands the challenges he/she will face as a founding charter school principal.

Supervision of the school leader will occur through a strong relationship between he/she, Tutelage School Solutions, and the governing board. Tutelage School Solutions and the board will agree on specific measurables, channels of communication, and what items he/she will need to report to the board formally and informally. This will take intentional action and trust between both parties but is critical to the organization's long-term success.

#### 4. Governance Structure

The board will consist of eleven members with four officers. We aim to develop committees to assist with the more profound work of the board. As a like-minded governing board, we have skill sets in Community Activism, Legal, Education, Religion, Business, and Real Estate.

In alignment with the organizational goals, the leadership team will present tangible evidence that the board will adopt to be the specific deliverables that demonstrate the progress toward each organizational goal. According to the Outcomes Based Calendar, the school leader and each standing committee will collect and analyze specific data and report to the board based on the schedule. The lead administrator will create a plan based on

the data analysis. In addition, the board will host an annual retreat to gather to analyze yearlong data and program evaluations to determine if the school is making adequate progress.

Our board, and partnering EMO, believe the purpose of an evaluation is to promote personal and professional growth. Therefore, the Ethos Academies School Director will be evaluated based on the progress towards the organizational goals, management of the school's budget, development and navigation of the organization, progress towards a successful charter renewal, and good standing with the authorizer and community as noted in the prior section. Ultimately, the school's success shall correlate to the school leader's ability to lead the school effectively. This evaluation will occur formally every six months. The Governance Committee will be assigned to perform this responsibility.

The board's composition will ensure active and effective representation of critical stakeholders by including business and community members. We will continue to strike a similar balance on future boards as the founding board members' term ends. We will also engage parents and other key stakeholders when engaging in fundraising and strategic long and short-term planning.

#### 5. The Transition from Planning Committee to the Board

While the Planning Committee has five (5) members, it will seek additional members. Therefore, when the Planning Committee operates as the Board of Directors, it will have the eleven (11) members outlined in the Bylaws.

To ensure that Board members understand their fiduciary responsibilities as Board members of a public charter school, all board members will participate in Board Member Roles and Responsibilities Training. They will also participate in professional development offerings to help them understand the Sunshine Law and Robert's Rules of Order. Each committee will participate in training specifically related to that committee's work. For example, the Finance Committee will undergo budgeting training. The Governance Committee will undergo policy development training and board evaluation training.

As described in Article IV, Section 2, Qualifications and Tenure, elected Board members will serve a term of one year and may serve additional consecutive terms. Terms for elected members will commence on July 1 of a given year, and terms for appointed members will commence on July 1 of a given year, or as soon as possible thereafter upon appointment by the Board. All expiring terms will conclude on June 30th of a given year.

Fifty percent (50%) of the Board members must be individuals with a background in K-12 education or business. The board shall appoint these members to serve two-year terms. The employees and the parents or guardians of scholars enrolled in Ethos Academies shall elect the other fifty percent of the board. Parents or guardians shall have one vote for each

scholar enrolled.

All members must be residents of the State of South Carolina. After the election, the term of a director may not be reduced. Directors shall take office on the next scheduled meeting following the meeting at which they are elected. Ethos Academies' employees are prohibited from serving on the Board during their employment. A person who has been convicted of a felony is not eligible to serve on the Board of Directors.

## 6. Membership

The founding board members were recruited and selected for their varied backgrounds and shared concern for providing educational choices and quality education to the scholars of Kershaw County and South Carolina as a whole. Several meetings were held that were open to all interested community members. From those meetings, leaders who wanted to take further action emerged and were selected to be on the Planning Committee. Additional members were recruited based on the need for their specific areas of expertise. The board has been working diligently to secure strong standing and credibility in the community to establish this public school of choice.

Board recruitment will be ongoing. A succession plan will be in place that will include each member recruiting one to three potential new members that match their skill sets. These potential members will be added to a standing committee until a board seat is available. We will work closely with these partnering stakeholders and hope to recruit many of them to join our board full-time. New members may be elected within three months of the vacancy (based on the need) or at the scheduled annual meeting if a position becomes vacant. Members will be recruited based on the board's needs at the time and chosen based on recommendations from the Nominating Committee.

## 7. Building Board Capacity

New board members will be assigned a mentor when elected to the board. That mentor will review the resource binder created by the founding board. The binder includes a copy of the charter application, the charter agreement with the state, the board's bylaws and policy manual, a copy of the Open Meetings Laws, a copy of all charter and public school laws, the expectations of a board member, and a calendar of monthly scheduled meetings. Most importantly, they will get an overview of the board's goals, successes, and current challenges. Hopefully, this new member will have spent time on a committee and have a strong understanding of the organization.

Every board member will be required to attend a minimum of four hours of governance training annually. Tutelage School Solutions provides funding for board members to attend governance training. In addition, board members will have the opportunity to collaborate with board members from other Tutelage School Solutions partner schools, share best practices, and

receive information on Core Knowledge, Math Standards, NWEA MAP assessments, and Edgenuity. Additional training could include attending trainings delivered by subject-matter experts and state-provided sessions that provide insight into legal matters, strategic planning, and nonprofit best practices. Board members will also dedicate personal time spent reading about how effective boards operate and then sharing insights gained from that reading.

Tutelage School Solutions or the Core Knowledge Foundation will also provide professional development to the faculty and staff. This will ensure the continuity of our mission and create open lines of communication between the board and the school community. In addition, we plan to retain legal counsel familiar with public school law to assist with training on open meetings/public records, compliance with our bylaws, and other pertinent legal matters dealing with education.

#### Specific Training Topics:

**Financial:** After completion of training, participants will demonstrate knowledge of creating, presenting, monitoring, and implementing a sound financial plan and an approved budget. Participants will identify overall financial strength and viability; the school's return on investment through financial planning; and revenue growth through enrollment projections

**Roles and Responsibilities:** This annual training will ensure our members understand that their role is to govern how well the plans of the operations team are meeting the needs of the scholars, staff, and stakeholders. The operations team determines how they will meet the needs of the scholars, staff, and stakeholders.

**Legal Compliance:** This session will review our organization's most critical documents and federal, statutory, and regulatory requirements (including the Freedom of Information Act).

#### 8. Governing Board Relationships

The primary decision-making process the Board will use is deliberation as an authorized group (full-Board or committees) based on research, analysis, counsel feedback, and experiences in monthly regular or special meetings to address the issues regarding the school's operation and compliance. We will also work in partnership with Tutelage School Solutions and its experts. This will be the only way for the board to be truly effective when making important decisions. The meetings will be organized to invite debate and discussion and manage conflict and problems resulting from the healthy debate. The board will work with key stakeholders (parents, community members, and lead administrator) to gain a well-rounded perspective concerning school policies. Additionally, the board will reach out to other successful charter school boards to utilize their perspective and wisdom concerning school policies. As with all the decisions made by the board, paramount is the fact that these policies support the mission and goals of Ethos Academies.

Our policies will be value-oriented and product-driven; legal and do not deny constitutional rights; communicated to ALL stakeholders; and written within the scope of the FULL board's authority. The policies will be adopted with the full authority of the board.

In developing school policies, initial recommendations will come from committees, the School Director, and parents based on whether our policies meet our desired purpose and the law. The process will be as follows:

1. A need will be identified.
2. Data will be collected.
3. Recommendations will be made.
4. Policy will be drafted.
5. Policy will be introduced for stakeholder input.
6. Policy will be presented to the board for discussion and a vote.
7. Policy will be embedded into the school's manual, disseminated, and communicated.
8. Policy will be reviewed annually as needed.

#### 9. Advisory Bodies

To ensure that the needs of individual schools are presented to and understood by the Ethos Academies Board of Directors, each school will elect an advisory board, and the advisory board will elect a representative to serve on the Board of Directors of Ethos Academies. Advisory board members are determined locally and could include teachers, staff members, parents, and community members. Teachers and staff members will not be eligible to serve on the Board of Directors of Ethos Academies

The board will also form local Parent-Teacher Organizations and committees that will advise the board in four primary areas: governance, academics, finances, and personnel. Although the board will seriously consider input from the following advisory bodies, only the board has the authority to make decisions and take action in these four areas:

1. Parent-Teacher Organization: The role of the PTO is to support the teachers and staff in their mission at each individual school. They will be an entity unto themselves and report to the School Director.
2. The Nominating Committee: The Nominating Committee will consist of board members who will recruit and nominate new members.
3. The Academic Committee: The Academic Committee will consist of board members and Core Knowledge experts from elementary and middle school. The Academic Committee will ensure that the school's mission is being realized in the classroom by analyzing test data, completing site observations, and gathering input from the school community. They will report their findings and make recommendations to the board.
4. The Finance Committee: The Finance Committee will consist of board

members. The members of this committee should possess a solid financial background. They will review and make recommendations on the budget proposed by Tutelage School Solutions and other major financial decisions impacting the school. They will report directly to the board.

5. The Personnel Committee: This committee will consist of board members and work with the School Director on personnel matters. The School Director will recommend the hiring of staff and teachers. The final hiring and firing decisions rest with the board. They will also work with the Finance Committee regarding employee compensation and benefits.

Finally, Ethos Academies proposes to enter into an EMO contract with Tutelage School Solutions. They will be provided:

- Marketing and scholar recruitment support.
- Academic programming support.
- Scholar accounting.
- Oversee 3rd-party financial services.
- Access to the experience of Tutelage School Solutions network schools.
- Lesson plans for the entire school year.

Tutelage School Solutions is a managing partner with the Ethos Academies board. They will be responsible for planning and implementing the school's mission. In addition, they will collaborate with the board to ensure the overall school mission, purpose, and fundamental tenets of the education plan are implemented with fidelity throughout the learning organization.

#### 10. Replication Schools

This question does not apply to the Ethos Academies - Kershaw application.



## Response to EMO/CMO Contracts

### 1. Partnership

The Ethos Academies Planning Committee partnered with Tutelage School Solutions because of its success in the charter school industry. Members of the Planning Committee visited and talked with leadership at Cherokee Charter Academy in Cherokee, SC. They were impressed with the school's operations and curriculum implementation. Seeing Core Knowledge instruction firsthand, the Planning Committee members knew that Tutelage would support this effort to open charter schools supporting rural South Carolina communities.

In addition to a strong academic model, Tutelage School Solutions has extensive experience in governance, operations, and academics.

The planning committee preferred Tutelage School Solutions' model to other models for the following reasons:

1. They do not require participating boards to purchase their facility from the EMO or use sweep accounts.
2. Their 10% fee is transparent as it is a fixed fee based upon revenue not excluded by State law.
3. The Educational Plan was direct and results-based. Data-driven values are a top priority.

Because Tutelage School Solutions has a proven educational model that aligns with our goals and community, we are confident that together we can operate a successful school that effectively teaches scholars and reaches its stated mission. Tutelage School Solutions will assist during the planning months, and they will recruit and recommend hiring the School Director. They will provide financial and scholar support services, website, logo, mascot, marketing, and scholar recruitment support. Tutelage School Solutions will be an excellent partner. The team members will support us in the facility development process but did not require us to work with them directly on the facility. Their core values line up with our values and goals, and we are confident that it is the best fit for Ethos Academies. Together, we are excited about educating the next generation of great American citizens.

### 2. Oversight and Evaluation Methods

The Board will approve all contracts for teachers and staff. Tutelage School Solutions will recommend the School Director, and the board will approve. The School Director will recommend, and the board will approve all employee contracts. All teachers are employees of the school and not the EMO.

#### Selection of the CMO:

Ethos Academies elected to partner with Tutelage School Solutions (TSS) as our CMO to reduce risk and maximize student achievement for the students of Kershaw County. TSS has a proven track record of success. The Planning Committee visited Cherokee Charter Academy (CCA) to see a school managed by TSS. The Planning Committee was impressed with

the rigorous academic instruction, the collegiality of the school culture, and the calm classroom environments. In addition to how impressed the Planning Committee was with CCA, the Planning Committee was also impressed with the governance, operations, and financial support that TSS provided CCA.

The TSS model is superior to other CMO models for the following reasons:

-First, TSS doesn't require that participating board purchase their facility from the CMO, nor do they use sweep accounts.

-Second, TSS's fee is transparent since it is a fixed fee based upon revenue not excluded by State law.

Because they have a proven educational model that aligns with our goals and with our vision for a school community, the Ethos Academies Planning Committee is confident that together we can operate a successful school that effectively teaches students and reaches its mission.

### 3. Independent Legal Representation

Ethos Academies is working toward securing an agreement with Wyche, PA, to provide independent legal representation.

### 4. Existing or Potential Conflicts

No conflicts are present at this time.

### 5. Subsidiaries or Related Entities

None at this time, but a discussion has occurred.

### 6. Documentation of Potential Resources

A potential loan for cash flow is reflected in the budget and documented in the attachments.

### 7. Operation in the Event of Termination

We understand that the State of South Carolina grants the charter to the Board of Directors. We are responsible for the governance and oversight of the school, and we cannot delegate that authority. We will set up measures to monitor the financial and academic performance of the school. We are entering into a contract with Tutelage School Solutions to recommend hiring the School Director and operating the school. We will be active and not passive board members. We live in this community and want to provide parents with the educational freedom to select the best educational setting for their scholars. We want Ethos Academies to be a destination of choice for scholars and teachers.

### 8.a. Outside Agreements

This question does not apply to Ethos Academies' application.

### 8.b. Financial Responsibilities

Property purchased with public funds will be the school's property, not the

EMO's. While the EMO will oversee the operating and capital expenditures, the Board of Directors is ultimately responsible. The EMO must stay the course of the budget as set by the Board. The School Director may move up to \$2,000 per line item between Board meetings if the funds are available. A full finance report for each budget line and each allocated dollar each month must be given. The Board will have a finance committee, meeting regularly to oversee the school's finances.

#### 9. EMO's Success

Tutelage School Solutions has found success with its first school, Cherokee Charter Academy. It's academic achievements are found in Question 11 in this section. Although there has been a change in leadership, the school has maintained steady enrollment and is compliant in all areas, including health and safety, operations, governance and finances.

#### 10. Current EMO Schools

Ethos Academies will ultimately include five schools, which will be part of a total of seventeen schools in South Carolina operating under the Tutelage School Solutions EMO model. Tutelage School Solutions will assist with start-up costs, including hiring the School Director, marketing, website, social media, logo design, ready-to-open process, policy and procedure development, financial services, scholar support services, furniture, curriculum technology, etc.

Tutelage currently operates one other school with The Charter Institute at Erskine as the authorizer. Cherokee Charter Academy opened in 2020 and is led by Jason Byrd. His email address is [schooldirector@cherokee.education](mailto:schooldirector@cherokee.education), and the school is located at 3206 Cherokee Avenue, Gaffney, SC 29340. They currently enroll 500 students. Erskine's contact information is as follows: Phone: 803-849-2464 and Email: [eassistant@erskinecharters.org](mailto:eassistant@erskinecharters.org).

Tutelage is slated to open two schools with The Charter Institute at Erskine, including Greenwood Charter Academy and Libertas Academies - Boiling Springs.

#### 11. Accountability Data

Tutelage School Solutions is a newly formed EMO and currently operates one school in South Carolina, Cherokee Charter Academy (CCA). In the fall of 2023, Tutelage will open two new schools, Libertas Academies - Boiling Springs and Greenwood Charter Academy. CCA has been in existence for two years, and state testing data for CCA 2021-2022 school year is listed below. As a public charter school, CCA welcomes all students, meets them where they are, and provides academic and socio-emotional support to ensure they progress.

CCA's second-year results, shared below, show that CCA students are outperforming the Cherokee School District average in every grade in both

ELA and Math, except fifth-grade Math. This performance in the school's second year of operation demonstrates the effectiveness of our school model. Because Cherokee County and Kershaw County have similar demographics, we expect that we will achieve similar results in Kershaw County as we have achieved in Cherokee County.

CCA and Cherokee School District Results for the 2021-2022 School Year:

SC Ready English Language Arts - Percentage that Meets or Exceeds Expectations

CCA:

3rd Grade: 50%  
4th Grade: 46.4%  
5th Grade: 39.7%  
6th Grade: 44.4%

Cherokee School District:

3rd Grade: 35.3%  
4th Grade: 37.2%  
5th Grade: 37%  
6th Grade: 33.5%

SC Ready Math -Percentage that Meets or Exceeds Expectations

CCA:

3rd Grade: 50.8%  
4th Grade: 34.8%  
5th Grade: 20.7%  
6th Grade: 42.9%

Cherokee School District

3rd Grade: 36%  
4th Grade: 26.5%  
5th Grade: 25%  
6th Grade: 23.9%

Source: <https://ed.sc.gov/data/test-scores/>

#### 12. Contract Terminations

Tutelage School Solutions has not experienced any management contract terminations or any charter revocations, non-renewals, or withdrawals/non-openings.

#### 13. Current or Past Litigation

Tutelage School Solutions has not been involved in any current or past litigation.

#### 14. Replication Applications:

This question does not apply to the Ethos Academies application.





## Response to Administrative Structure/Building Leadership

### 1. Administrative Structure

The School Director (SD) is the lead administrator, and all employees report to the SD. The Instructional Coaches report to the SD and have authority over the academic implementation of the instructors. The Special Education Director and the Guidance Counselor are members of the administration.

### 2. School Leadership Capacity and Experience

Ethos Academies' staff will be held to high-quality standards by daily carrying out the Ethos Academies mission. All staff members are expected to communicate clear expectations and goals, uphold all legal, professional, and ethical requirements of the profession, and create an environment conducive to learning. Clear expectations for key roles are outlined below:

#### School Director:

- Hold a Master's Degree in Administration or equivalent experience and must have five years of leadership experience.
  
- Ensure that the Core Knowledge Sequence aligns with the South Carolina College- and Career--Readiness Standards are being implemented in the classroom daily.
  
- Supervise and manage the Ethos Academies' staff and report on the school's overall operation to the Ethos Academies' board of directors every month.
  
- Responsible for handling scholar and staff conduct per Ethos Academies' scholar and staff handbooks.
  
- Will be active in coordinating Ethos Academies' professional development plan.
  
- Oversee the creation and implementation of the school's marketing plan.
  
- Ensure that the school operates within the budget and be responsible for all fiduciary requirements.

#### Office Manager:

- Hold a bachelor's degree.
  
- Coordinate and maintain the teacher licensure program.
  
- Have two years or more of administrative experience.
  
- Assist in coordinating the professional development plan.
  
- The lead person to whom all contract positions report is the point of contact for the PowerSchool administrator.

- Report to the School Director.

- Assist in marketing.

Core Content areas, EC, Music, Physical Education, Technology, and Art:

- Hold a bachelor's degree or equivalent education experience.

- Teach the Core Knowledge Sequence in alignment with the South Carolina College- and Career-Readiness Standards.

- Create a classroom climate conducive to learning.

- Create open lines of communication with parents.

- Offer tutoring and enrichment activities to scholars as needs arise.

- Communicate clear expectations, goals, and grading requirements to parents and scholars.

- Differentiate lesson plans to fit the needs of individual scholars.

- Maintain and keep current records on all scholars, including portfolio work and grades.

Content Coaches:

- Must hold a Bachelor's Degree

- Coordinate the school's Core Knowledge program

- Train new teachers in Core Knowledge

- Assist teachers in Core Knowledge

Office Assistant:

- Hold an Associate's degree or equivalent experience.

- Have at least two years of experience as an administrative assistant.

- Coordinate and run the Ethos Academies' front office and adhere to all duties encompassed therein.

- Coordinate school volunteers.

- Assist the assistant administrator and the lead administrator as the need arises.

### 3. Hiring Lead Administrator and Transition of Leadership

The School Director (SD) position will be advertised and sought from a

wide area, including SC, NC, and GA. Tutelage School Solutions will narrow the list and interview candidates. After interviews, a candidate will be presented to the Board of Directors for review and approval. Tutelage School Solutions will not hire an SD the board does not fully support. Because of the support of the EMO, the transition from board to SD leadership will be seamless. This Planning Committee clearly understands that day-to-day operations are handled by the SD and overseen by the EMO.

#### 4. Nature and Extent of Involvement

Ethos Academies will engage parents and residents through community meetings, the use of the news media, online social media, religious organizations, preschools, promotional videos, and building strong relationships with the local business community. There has already been an organized effort by parents and community leaders to notify the public about Ethos Academies. Locally, we have distributed surveys to the community and sent letters to leadership throughout the State. Board meetings will be transparent and maintain a section of time built for public comments. We will also schedule town hall meetings to allow the community to express their more significant concerns.

Ethos Academies will engage parents early and frequently in the school year and encourage them to volunteer and play an active role in their child's education. Through the school's intense focus on character development, there will be an increased focus on bridging the gap between home life and school life. Bridging this gap will include several interactive lessons that build on parental involvement. These lessons will be presented at evening events, opened to the public, displaying scholars' work, varying from the arts to core subjects, including science and technology. Parents will be invited to participate in the Core Knowledge Domain Celebrations.

Ethos Academies will also develop a strong Parent Teacher Organization with parents and teachers working closely together to carry out the school's mission. The board will encourage open and transparent communication with parents and encourage parents to become a part of the fabric of Ethos Academies. Leadership will write monthly newsletters to provide the state of the charter and new happenings. At the end of the year, the leadership team will collaborate with PTO to write the "State of the Charter" address. This document will be utilized to write grants and request outside funding to further support the school's needs. One intentional parental engagement tool will be family breakfasts and consistent and clear communication between the administration and individual teachers. Parents will be made aware of volunteer opportunities by email, social media, and newsletters.

#### 5. Capacity Building Plan

All leadership positions are clearly reflected in the budget in Year One as 1 School Director, 1 Content Coaches, 1 Guidance Counselor, and 2 EC Teachers (One will serve as the director). By Year Five, the leadership positions will grow to 1 School Director, 2 Content Coaches, 1 Guidance

Counselor, and 4 EC Teachers (One will serve as the director). The EC department will grow as described, but modifications may be made due to the need and number of scholars who qualify for services.

#### 6. School Leader and EMO Evaluation

Our board, and partnering EMO, believe the purpose of an evaluation is to promote personal and professional growth. Therefore, the Ethos Academies School Directors will be evaluated based on the progress towards the organizational goals, management of the school's budget, development and navigation of the organization, progress towards a successful charter renewal, and good standing with the authorizer and community as noted in the prior section. Ultimately, the school's success shall correlate to the School Director's ability to lead the school effectively. This evaluation will occur formally every six months. The Governance Committee will be assigned to perform this responsibility.

The Board of Directors will evaluate the EMO relationship on results of scholars, finance, enrollment, and compliance with all SC state laws and regulations. While ongoing, a formal evaluation will occur at the Board's yearly retreat.

#### 7. Replication Schools:

This question does not apply to the Ethos Academies - Kershaw application.



## Response to Employees

### 1. Hiring Criteria

Ethos Academies will be able to recruit through a national and local network. We will attend and potentially host job fairs in and around Kershaw. We will also work with regional colleges and universities to help identify qualified and interested candidates for our available positions. We also anticipate using online human resources sites, such as Indeed.com, to be vital for recruitment.

Ethos Academies will focus on people first and provide an atmosphere of respect for all faculty and staff members. Our decision-making processes will intentionally include staff to help guide the school's leadership in accomplishing the mission. Teachers will be supported professionally through learning communities, high-level professional development, instructional coaches, and an internal mentoring system. We aim to provide teachers with a competitive benefits package that will be paid commensurate with their experience. The school will offer all full-time employees a 401(k) plan. This type of plan, a defined contribution plan, versus the state's defined benefit plan, is more flexible for most teachers and is portable. In addition, the plan will provide for an employer match of up to 4% of employee annual contributions.

Full-time employees will also receive health insurance with employee coverage paid in substantial part by the school and life insurance and disability benefits. The school is planning to forgo the state retirement and health plans but will make that decision final upon the charter approval. The school will incur the costs of mandatory unemployment and workers' compensation insurance. Our Assistant Teachers will serve as a built-in recruiting source for new teachers. Many will be certified or working toward certification and candidates for open teaching positions.

### 2. Recruitment Strategies

Ethos Academies will recruit nationally as well as locally. We will also attend and potentially host job fairs in and around Kershaw County and work with regional colleges and universities to help identify qualified and interested candidates for our available positions.

Ethos Academies will focus on people first and provide an atmosphere of respect for all faculty and staff members. Our decision-making processes will intentionally include staff to help guide the school's leadership in accomplishing the mission. Teachers will be supported professionally through learning communities, high-level professional development, instructional coaches, and an internal mentoring system. We aim to provide teachers with a competitive benefits package that will be paid commensurate with their experience. The school will offer all full-time employees a 401(k) plan. This type of plan, a defined contribution plan, versus the state's defined benefit plan, is more flexible for most teachers and is portable. In addition, the plan will provide for an employer match of up to 4% of employee annual contributions.

Full-time employees will also receive health insurance with employee coverage paid in substantial part by the school and life insurance and disability benefits. The school is planning to forgo the state retirement and health plans but will make that decision final upon the charter approval. The school will incur the costs of mandatory unemployment and worker's compensation insurance. Our Assistant Teachers will serve as a built-in recruiting source for new teachers. Many will be certified or working toward certification and candidates for open teaching positions.

### 3. Assurances

At least one administrative staff member will hold a current SC certification of administration or have at least one year of experience in the field of school-based administration.

### 4. Teacher Evaluation Process

Ethos Academies will adopt the ADEPT Evaluation System to evaluate teachers.

### 5. Policy Communication

We have reserved professional development time for the School Director or their designee to address all employment policies fully. Each employee will receive a complete electronic copy of all policies and acknowledge the receipt by electronic signature. All updates to policies will be electronically communicated to all employees within 30 days of the change and before the change begins.

### 6. Grievance and Termination Procedures

Ethos Academies will follow these procedures when hiring or terminating the School Director:

1. Tutelage School Solutions will recommend the hiring of the School Director.
2. The board will have the discretion to approve or disprove the recommendation.
3. Tutelage will bring candidates for the board's consideration until the board selects a satisfactory candidate.
4. The School Director will recommend hiring and dismissing the teachers and staff.
5. The board will approve the recommendations.

In the unlikely event that Tutelage recommends terminating the School Director, the board of Ethos Academies will evaluate the recommendation and make the final decision.

The hiring process will include practices to understand how each employee is exemplary in communication, relationship building, and collaboration. In addition, we will hire teachers who are coachable, hungry to learn, and socially savvy. Ethos Academies will recruit faculty that embrace our mission to foster scholar learning and achievement and inspire scholars to become independent thinkers, effective communicators, and contributing

citizens of a global society.

Our required applications will contain:

- a sealed college/university transcript, indicating a cumulative GPA of 3.0 or higher;
- a clean National Criminal Background Investigation Check;
- three letters of reference documenting leadership and community service;
- submission of sample teaching video;
- demonstration of superior writing skills through submission of writing samples; and
- teaching portfolio with sample units.

Our hiring process will include:

1. Initial screening interview.
2. Teaching observation to observe abilities to engage, educate, and communicate.
3. Formal interview to debunk any theories.
4. Participation in school events to determine how the candidate interacts with others.

Our School Director will be responsible for implementing the evaluation tool, providing effective feedback, and utilizing experts to help educators to grow. An employee may be placed on an action plan before recommendation for dismissal; however, no one is more important than the school's overall culture.

The board may need to approve the dismissal of staff members based on their actions as recommended by the School Director. The board may verify these processes were carried out with fidelity through an internal committee or external review.

If an employee has a concern or complaint involving any aspect of his or her employment, including a termination decision, then the employee may follow the steps outlined below:

1. Concerns and complaints should be communicated to the School Director. When appropriate, the School Director will reach out to the EMO for advice regarding the grievance.
2. If the matter concerns the School Director or remains unresolved after the meeting with the School Director, then the employee may follow the board's policy and grievance process, which includes communicating in writing with the Board Chair. A Governance committee will be appointed specifically to respond to grievances. This committee will contact the EMO for insight and guidance regarding the grievance.

The Grievance and Termination Procedure:

1. To create, sustain, and continually develop a positive learning environment for all stakeholders, the board encourages open dialogue among employees, administrators, and board members. However, there

might be instances where grievances arise among members of the school community whereby a teacher, staff member, or member of the administration has violated a school policy; therefore, the board has developed a grievance policy to effectively and fairly respond to an aggrieved person.

2. If an employee has a grievance, he or she will work in a good faith effort to resolve the grievance by taking the following steps:

a. Determine a mutually agreeable time to meet and discuss the perceived grievance with the teacher or other employee related to the grievance.

b. If this initial meeting does not result in a resolution, the employee is to communicate the perceived grievance in written format to the School Director; electronic or paper are both acceptable forms of communication. The School Director may choose to assemble and lead a meeting with the members of the initial party. As an employee of the board, when appropriate, the School Director would reach out to the board chair to simultaneously alert him or her of the concern and seek advice regarding the grievance.

c. If there is no resolution to the issue following the meeting with the School Director, the employee may file a grievance by following the board's policy and grievance process.

d. The board or appointed committee will receive the grievance and determine the next steps, which may include contacting the school's attorney for legal advice.

3. If an employee has a grievance, then the employee is to take the steps outlined below:

a. Grievances should be communicated to the School Director. As an employee of the board, when appropriate, the School Director would then reach out to the board chair to simultaneously alert him or her of the concern and seek advice regarding the grievance.

b. If the matter concerns the School Director or remains unresolved after the meeting with the School Director, then the employee may follow the board's policy and grievance process, which includes communicating the perceived grievance in writing to the Board Chair. The Board Chair may contact the school's attorney for insight and guidance regarding the filed grievance if deemed necessary and convene the Executive Committee to deliberate and decide upon the next steps. Ultimately, the board makes the final decision regarding any response to or action steps required because of the filed grievance.



## Response to Enrollment

### 1. Enrollment Policies and Procedures

Immediately following the preliminary approval of our charter, Ethos Academies will conduct open enrollment. We will inform interested parties of the enrollment process and timelines in community information sessions and social media posts. The application will be available to fill out online and in print format. It will be available in both English and Spanish. Immediately following the closing of the enrollment period, Ethos Academies will determine if a lottery is needed. If a lottery is not needed, all applicants will be accepted, and parents and guardians will be notified. Parents and guardians need to respond about their scholar's attendance at Ethos Academies within the timeframes outlined in our enrollment policy. If a lottery is necessary, a date will be set for the lottery, which will take place up to two weeks from the close of the enrollment period and will only include the names from the enrollment period noted above. Parents and guardians of applicants will be notified of the date and time of the lottery.

The lottery will be open to the public, and names will be decided by a computerized randomization system per the policies adopted in South Carolina's Code of Laws. Once the names are chosen, the parent or guardian must respond within the timeframes outlined in our enrollment policy. Ethos Academies will abide by the following:

-Children of the committee members and full-time staff members will receive priority admission, up to 20% of the total enrollment.

We anticipate developing a waitlist of scholars. If a scholar withdraws, the next name on the waiting list will be offered a seat, and that scholar's parent or guardian will be given one business day to respond. The School Director will develop a process to maintain effective scholar records and transfer documentation in a timely manner.

We will utilize community meetings and open forums before the admissions process begins. These are to inform the public of the enrollment period and share our vision and mission with interested parents and community members.

If a scholar withdraws from the school, the parent or legal guardian should immediately notify the school. Ethos Academies will verify the withdrawal of the scholar by letter. Once the letter is submitted, that seat will be open, and if needed, the waiting list will be utilized. Any family who chooses to withdraw their scholar(s) will be asked for an exit interview and sent a survey. The family's decision will be honored, and the scholar will be released in PowerSchool promptly within one school day.

Proposed Timeline for Reaching a Diverse Student Population:

In Year 1, Ethos Academies will be located in Camden, a diverse Kershaw County School District community. Our advertising campaign to educate the population will be diverse in its presentation. Billboards will be strategically placed in locations for the most significant number of views

and intentionally placed to ensure African American and other underserved communities have full exposure. Social media ads will be pinpointed to communities and reviewed regularly to adjust. Community Information sessions will be held in all areas of the community. We will seek community groups and churches to enable Ethos Academies to speak to a wide range of the population of Kershaw County. Our EMO's existing schools have been very successful in attracting students and being a strong reflection of the community to include on a racial demographic base. The Planning Committee is prioritizing its efforts so that Ethos Academies reflects the community, and the committee will work to ensure that outreach efforts reflect that priority.

## 2. Recruitment Strategies

To ensure that each community within Kershaw is made aware of Ethos Academies, the school will conduct a robust outreach effort, including a social media campaign because it provides an easy method to educate and onboard prospective families, regular community-based events because it provides a welcoming, low-risk opportunity for parents to learn about the school, and easy enrollment processes because that removes barriers to enrollment.

## 3. Communication Processes

Ethos Academies understands that to be successful as a charter school, we must maintain full enrollment of scholars in our first year and implement a lottery and enrollment process that is open to every eligible student in South Carolina. This will be accomplished through the teamwork of the Ethos Academies board, the School Director, and the EMO. Tutelage School Solutions will also provide a website to communicate with potential scholars and parents. We will also utilize social media such as Facebook to advertise and educate the general public. In addition, we will participate in community events and hold community information sessions. To reach and maintain full enrollment, we plan to implement an ongoing marketing plan that includes, but is not limited to, the following:

Charter Application Phase: Gather additional information regarding the educational need or interest for a public charter school from 400 families; recruit additional committee members; and add five potential community partnerships.

The board will participate in community events during this phase, visit daycare facilities, and hold community information sessions. Conduct a series of public relations endeavors to publicize the school to the community so interested parties will be aware of the school's upcoming application submission. Strengthen the social media presence, email blasts, and communication with the local community regarding application submission dates and processes. Receive interest forms from parents.

Planning Year: Obtain 200 Letters of Intent (LOI). Educate parents that Letters of Intent cannot serve as substitutions for enrollment applications;

instead, their purpose is to provide the board insight into the level of interest in the school in the Kershaw area. We will collect contact information utilizing LOI format and recruit prospective volunteers and board members. We will use host community gatherings, public charter school town hall meetings, and potential employment fairs. We will also ask committed families to host gatherings in their homes to share the mission of Ethos Academies with prospective families. The Board of Directors will visit local preschools, daycares, churches, other child-related organizations, and community organizations to distribute information.

Once the School Director is in place, he or she will perform this duty in conjunction with board members. We will also speak at local civic meetings, such as Rotary Club, Kiwanis Club, Civitan Club, etc. To ensure that we reach all demographics, we will conduct community meetings open to the public throughout Kershaw at branches of the local public library and churches. We will use a PowerPoint presentation at these meetings to provide information about the school and the application process. One of our board members and one of our consultants are bilingual and will assist in interpreting during the meeting and translating brochures and fliers. In addition, a representative of Ethos Academies will attend community events to promote the school.

Final Planning Period: Secure 825 applications for enrollment by sending a direct mailing to households in specific zip codes. After the lottery, we will utilize our best marketing tool, our enrolled families, and use them to host community gatherings, public charter school town hall meetings, and potential employment fairs.

First 20 Days of School: We will build and sustain a waitlist that is 25% or above capacity per grade. After testing marketing strategies that worked best over the past 18 months, we will focus our attention on the top two strategies and continue to promote them in the community.

#### 4. Notification Processes

Immediately following preliminary approval of our charter, Ethos Academies will conduct open enrollment. We will make interested parties aware of the enrollment process and timelines in community information sessions and social media posts. The application will be available to fill out online and in print format. It will be available in both English and Spanish. Parents and guardians need to respond about their scholar's attendance at Ethos Academies within the timeframes outlined in our enrollment policy.

After closing of the enrollment period, Ethos Academies will determine if a lottery is needed. If a lottery is needed, a date will be set, which will take place no more than two weeks from the close of the enrollment period and will only include the names from the enrollment period noted above. Parents and guardians of applicants will be notified of the date and time of the lottery. The lottery will be open to the public, and a computerized randomization system will decide names. Once the names are chosen, the

parent or guardian will have to respond within the timeframes outlined within our enrollment policy. If a lottery is not needed, all applicants will be accepted, and parents and guardians will be notified.

#### 5. Enrollment Priorities

Children of employees and the Board of Directors will have enrollment priority. Siblings of admitted scholars will also have enrollment priority. As mandated by state regulation, the total number of priority students will not outnumber 20%.

#### 6. Out-of-District Students

This question does not apply to the Ethos Academies application since we are applying with the Charter Institute at Erskine.

#### 7. Reflecting the Local School District

Ethos Academies will be located in the heart of Kershaw County. Transportation will be offered but only within the county. With the feedback we've received from community members regarding their interest and support of a new charter school in Kershaw, we firmly believe that 90% or more of our scholar population will be Kershaw County residents.



## **Response to Student Conduct, Rights, and Responsibilities**

### **1. Handbook and Policy Development**

During Ethos Academies' planning year, a scholar handbook and related policies will be developed by members of the Planning Committee with education and legal experience. This will ensure that the handbook and all policies comply with the Family Education Rights and Privacy Act and are in accordance with best practices, providing the teaching and administrative team the framework necessary to ensure that the school meets its mission.

### **2. Student Rights and Responsibilities**

Scholars are expected to follow all behavioral guidelines outlined in the Scholar Handbook. In addition, our character development programs will play a role in helping scholars control their behavior and solve problems without teacher intervention. As the Core Knowledge Sequence builds on prior knowledge, we believe this educational model allows scholars to recognize appropriate behaviors that have been previously taught and modeled. Just as scholars will build on prior knowledge academically, they will be expected to do so socially and emotionally as well.

We will implement strategies to support the socio-emotional needs of scholars, including teaching The Core Virtues program daily during Morning Circle. This will meet the scholars' socio-emotional needs and develop their moral, civic, and intellectual virtues. With each scholar having a common understanding and shared expectations for working with and alongside classmates and doing what's expected, so much more can be accomplished than is typical between August and June.

Our referral program will give teachers a clear referral path for scholars exhibiting struggles with behavior. The guidance counselor will use the MTSS process related to behavior and offer the support that the scholar needs to return to the highest tier of functionality possible. In addition, the guidance counselor will consider environmental factors that could influence a scholar's decision-making process and impact his or her overall effectiveness at school. The guidance counselor and teacher will then coordinate the effort to implement services and/or interventions.

Teachers and support staff will be trained to evaluate scholars in key social-emotional learning competencies, including self-awareness, relationship skills, and responsible decision-making. This will enable teachers to identify scholars who need services. The School Improvement Team will manage these cases according to the scholar services plan and provide accountability reports to demonstrate that scholar progress is being monitored, evaluated, and changed as necessary.

A Code of Conduct contract will be provided to parents and scholars before the start of the school year. It outlines and defines the infractions that may lead to in-school consequences, suspension, and expulsion. Depending on the severity and situation of each case, there is a range of offenses that may lead to a consequence, ranging from in-school disciplinary action to

long-term suspension and expulsion:

Infractions of class/school rules

- ? Contraband items (i.e. lighters, matches)
- ? Integrity (i.e. cheating, forgery)
- ? Trespassing
- ? Inappropriate interpersonal/sexual behavior (including harassment)
- ? Disrespect and noncompliance
- ? Use of electronic devices
- ? Gambling
- ? Harassment, abusive, offensive language
- ? Bullying Hazing
- ? Physical, written, or verbal aggression, or threat of
- ? Unjustified activation of a fire alarm or other system
- ? Theft or destruction
- ? Possession of tobacco, narcotics, alcohol, or controlled substance
- ? Possession of a weapon, including a firearm.

### 3. Appeal Process

Scholars will be granted due process rights, including the opportunity for a hearing before the Board, per the state law for suspensions and expulsions.

The Appeal Process for Students Recommended for Expulsion:

Students recommended for expulsion may appeal the suspension beyond the School Director to the Ethos Academies Board of Directors. The latter will determine the final decision unless the expulsion warrants the involvement of the judiciary system. This appeal must be made within five school days of the expulsion notice. The appeal shall be in writing and focus on the issues raised regarding the suspension. The Ethos Academies Board shall make a reasonable effort to hear the appeal within seven days of the request. At a minimum, two Board members shall hear the appeal and record the decision.

### 4. Addressing IDEA Compliance

While it may be necessary for scholars with disabilities to be suspended or expelled from the school, before those scholars can be suspended for more than ten (10) school days in a given school year, a manifestation determination meeting must be held by the IEP team to decide if the scholar's disability caused the misbehavior. The outcome may impact any further disciplinary action taken related to the scholar to ensure the scholar will not be denied FAPE per federal law.

### 5. Protecting Students' Rights and Due Process

To Ethos Academies, due process serves two goals:

1. Through the use of fair procedures, to create more accurate results.

2. Ensure that all parties are treated fairly by allowing them to share their side of the story.

At Ethos Academies, we will ensure that all scholars receive due process and that during that process, the school will endeavor to achieve those two goals. A scholar will always be treated with fundamental fairness, remain fully informed about his or her alleged breach of behavior, and be provided with an opportunity to respond to such charges. Our procedures comply with State law, ensure a fair process to all parties, and include an opportunity for all parties to be heard.

To ensure that scholars with disabilities are not disproportionately affected by the discipline policy, we will be vigilant in the monitoring of IEP's to ensure that both academic and behavioral goals are being met consistently and accurately reflect the current and ongoing needs of the scholars in an effort to address behaviors that have the potential to become problematic and result in a suspension.

A discipline hearing will be conducted for scholars who have been suspended, expelled for more than ten (10) school days. The Board shall appoint members to a Discipline Hearing Committee that will be charged with the following responsibilities:

- hearing individual cases;
- preparing and disseminating the minutes of each meeting;
- setting the time, place, and date for each hearing;
- notifying appropriate persons of each meeting within forty-eight (48) hours of receiving notification of the suspension/expulsion; and
- signing and maintaining a copy of minutes of the meeting.

Each hearing shall be conducted by at least three (3) members of the Discipline Hearing Committee. The hearing must be held, a decision must be rendered, and notification of the decision must be provided to the parents and/or scholar and the School Director no later than ten (10) days after the beginning of the suspension/expulsion. Notification of the decision shall include a statement of the right of either party within five (5) days after receiving the decision to request a review by the Board.

The discipline Hearing Committee may take the following disciplinary actions:

1. Affirm the decision of the School Director;
2. Order removal of the suspension/expulsion unconditionally;
3. Order removal of the suspension/expulsion upon such terms and conditions as it deems reasonable;
4. Suspend or Expel the student for a specified period of time.

If a review of the hearing is requested by either the scholar or School Director, the Board shall review the record or grant a second hearing. If the Board chooses to review the record, it shall:

1. Affirm the decision of the hearing authority; or
2. Modify the decision to a lesser penalty; or
3. Grant a hearing before the Board.

If the Board chooses to grant a hearing, it may:

1. Affirm the decision of the hearing authority; or
2. Modify the decision in any manner; or
3. Impose a more severe penalty than that of the hearing authority.

# Transportation

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## Response to Transportation

### 1. Bus Transportation

Our plan will consist of various offerings to ensure that all enrolled scholars choose how they will arrive at school each day. We plan to purchase two used school buses and build a strategic cluster stop system to transport children. We will utilize a program such as Google Fusion (based on student addresses) to determine the best location for a cluster stop. Over the next year, we will select how scholars will qualify for transportation. Since we want to ensure we are meeting the needs of all of our children, factors may include the distance from the school, economic status, and special circumstances. Transportation will not be a barrier for any scholar attending Ethos Academies.

Student transportation costs are based on the per-student rates determined by the School Transportation News Service. The school anticipates purchasing two used buses (\$10K each) in the first year and an additional bus in the second and third operating years. We also reserve the right to contract with a transportation provider using these funds.

### 2. Transportation Contract

This question does not apply to the Ethos Academies application.

### 3. Addressing Transportation Needs

As the school grows, we aim to purchase more school buses and potentially replace these original buses with a higher-quality model to reduce maintenance. We also again reserve the decision to contract with a company.

If a child is enrolled in the school and has related services based on their IEP, we will independently contract with a provider to ensure the school provides the scholar transportation to school. These funds to pay for such a service may be requested from a special state reserve or identified in our budget if needed.





## Response to Budget and Finance

### 1. Individual and Collective Qualifications

The EMO will recommend a third-party to provide financial management services to the Board of Directors, which include accounting and managing internal controls. While fundraising is not a budgeted item, it will be conducted once the school is operational and the school and the larger community demonstrate its commitment.

The planning committee members sought out Tutelage School Solutions to start a charter school because of the needs in Kershaw. Individually, the Planning Committee members have various skills, expertise, and experiences that culminate in a highly effective planning committee, and, ultimately, the board. The backgrounds of the planning committee include:

The planning committee is working with Tutelage School Solutions, which has a history of successful implementation of financial processes and systems, accounting and reporting, internal controls, and fundraising in charter schools throughout the United States, including South Carolina. Tutelage's ownership includes a licensed CPA with over 25 years of experience in charter school financial management in North Carolina, South Carolina, and Georgia.

Tutelage has been consulting with and will continue to work with Prestige School Solutions to develop and implement effective operational and functional level internal controls and fiscal management policy consistent with the authorizer's local requirements and the SCDOE.

#### Planning Committee's Finance Experience:

-Mr. Ben Trammel is a Southeast Region Sales Executive with Softdocs. He earned a Bachelor's of Science degree in Marketing from the Wilbur O. and Ann Powers College of Business at Clemson University and a Master's of Business Administration, Entrepreneurship.

-Ms. Leslie Wilson is a Senior Vice President with The Cornerstone Project and is the owner of Delta Consulting Services. She is proficient in all aspects of organizational support from hiring, staff development, budget development, data collection and oversight, to creating programs and services, and managing strategic partnerships on federal, state and local level.

### 2. Supportive Proposed Budget

The budget aligns with the school's mission. As evidence, approximately 60% of our funding is allocated to academic programming, instructional personnel, instructional resources, and professional development. The budget reflects our commitment to investing as much as possible in the school's instructional priorities.

With the significant investment in our curriculum, our start-up budget and our 5- and 10-year budgets reflect those investments as our school's priorities. As a result, there is a replacement rotation of curricular items

throughout the budgetary process to ensure all items are replaced and up to date.

NWEA MAP testing is a significant part of our assessment process. This test will be given at least three times yearly, fall, winter, and spring, with a possibility of a fourth test if deemed necessary by the administration in collaboration with Tutelage School Solutions academic leaders. The data from these assessments are critical to addressing our scholars' educational needs, meeting a scholar where they are, and growing the individual. A growth model of only one year per school year is not a successful model for scholars who are not on grade level. Our data-driven model serves to grow the scholars for at least one and one-half years per school year.

Core Knowledge, Core Knowledge Language Arts, Eureka Math, and Core Virtues materials will be provided for all scholars and teachers. In addition, there will be other costs with items for Music, Art, Physical Education, instructional computers, software technology, and equipment. The full budget for Year One is \$551,850 for instruction, including supplies, textbooks, technology and software, FFE, and computers. This expense decreases significantly in Years Two through Five, with an average cost for Y2-Y5 of \$133,871.75.

We understand that the needs of a rural community increase the need to allow for budgetary consideration for our anticipated population. This includes funds to meet transportation and lunch needs. Based on the county population and location of the school, we anticipate close to one-fourth of our population needing transportation to ensure their daily attendance. Therefore, we are budgeting approximately \$32,000 to cover the costs of transportation in Year One, whether that be contracted or purchases of used buses to be operated by the school. This number was based on estimates from multiple public charter school budgets regarding transportation. This expense decreases significantly in Years Two through Five, with an average cost in Y2-Y5 of \$12,927.50.

Ethos Academies will secure a bond for the purchase of the facility. There will be an 18-month window before payments begin, and Ethos Academies predicts that payment will begin in January of 2025. As a result, for the 2024-2025 budget, the cost estimate for Debt Principal and Interest payments is zero. In the 2025-2026 budget, the cost estimate is \$1,694,365, and in the 2026-2027 budget, the cost estimate is \$1,819,385. These estimates reflect 19.7% of the budget in 2025-2026 and 18.6% of the 2026-2027 budget. These percentages continue to decline in Y4 and Y4 to 17.68% and 17.60%, respectively.

### 3. Budget Assumptions, Calculations, and Revenue Estimates

Enrollment is allocated across standard and special weightings using a pro-rata percentage of 2020-2021 45-day weightings for Kershaw County School District. These weightings remain constant throughout the 10-year period.

Fundraising efforts are estimated at \$25 per student per year for Contributions and Donations and \$20 per student per year for Fundraising.

We estimate an annual cost of \$75 per student for Instructional Supplies. For Textbooks and Instructional Technology, we estimate annual costs of \$85 and \$35 per student, respectively. For Instructional Equipment and Computers, we estimate annual costs of \$18 and \$250 per student, respectively, which does not include the initial cost of the computer.

Many of these capital purchases may be provided by loaned funds through the EMO partnership; a lease agreement could procure the remaining needs. Also, we have not shown any E-rate reimbursement to reduce these costs. Therefore, we plan to purchase a blend of new and used furniture and fixtures and avoid leasing or financing.

Facility costs are based on 700 scholars at approximately 50,000 square feet. We expect to build or renovate the school's long-term home and plan to build a permanent facility or expand in the original building by year three.

While not reflected in the budget, Ethos Academies will apply for and expect to receive the Federal Charter School Program Start-Up Grant. We will also secure funding for our building project from Charter lenders.

EFA base funding is \$10,616.90 per student (at 1.00x) and is presented net of the 2% authorizer fee. Allocation of student classifications and weightings is based on the 45-day weighting of the local school district, as the school believes that the existing local school population is the best assumption upon which to base the representative, planned enrollment in the charter school.

The following assumptions have been made as we formulated the budget:

-The fringe benefits employer contribution is based on \$725.84 per WPU.

-Where appropriate, we have applied a rate of increase for many expense categories at 2% over the prior year except for food costs and insurance, with respective rates of increase of 6% and 5%.

-Student transportation costs are based on the per-student rates determined by the School Transportation News Service. The school anticipates purchasing two used buses (\$10K each) in the first year and an additional bus in the second and third operating years.

Year 1 Assumptions:

1. The average instructional classroom teacher salary is anticipated to be \$45,000. Instructional salaries are assumed to increase at a rate of 2% per year. The School plans to annually contribute \$7,860 (representing the single employee health insurance premium) to employees eligible for health insurance coverage and contribute 4% of gross salary to employees

eligible for retirement benefits.

2. Employment tax rates are based on the current established rate by the applicable taxing authority. Worker Compensation rates are based on an average of current policies in effect in comparable charter schools of \$5.60 per \$1,000 in compensation.

3. The school will procure fiscal management and back-office services.

Employment of the school leader:

1. The school will pay for the school leader's salary.

2. The only monies that Ethos Academies will owe Tutelage School Solutions are outlined in totality in Appendix O, the EMO/CMO Documentation.

4. State and Federal Money

The budget includes only a nominal amount (<1%) of contributions, donations, fundraising, and other revenues for its operations; however, we expect contributions, donations, and fundraising to be realized substantially higher. The budget does not rely upon realizing funds beyond the EFA/EIA per-pupil allocation.

The School will source the working capital debt service internally (through Tutelage) and will source FF&E financing through established relationships with existing lenders.

5. Negotiated Services

The school will draft, implement and maintain a number of operational and functional level internal financial controls, bookkeeping practices, and best-practices accounting procedures in accordance with Generally Accepted Accounting Principles. The board will exercise regular oversight of the school's annual budget and monthly revenues and expenses compared to the budget via the provision of timely and accurate information and reporting to the school's finance committee and board from school leadership and the external back-office provider. Board oversight includes the following areas:

- PowerSchool and Student Accounting
- Financial Services -Cash Management
- Invoicing
- Payroll
- Lead in Audit Preparation for Independent Auditor
- Operations and School Management Oversight
- Teacher Recruiting, Hiring, and Development
- Curriculum Support
- Leadership Development
- Governance support and development
- Marketing expertise
- Web Site Management

We will rely on our partner, Tutelage School Solutions, to vet potential service providers properly for any other services. The process may include a formed committee consisting of Tutelage School Solutions representatives, the School Director, and board members to seek and vet vendors. The committee or team will make a recommendation to the board for a vote. Third-party contracts will be evaluated annually to ensure a strong return on investment. The School Director will be an employee of the EMO.

The Board will develop and approve a fiscal policy manual before the school's opening. The finance committee will, in collaboration with established charter school accounting consultants, draft specific processes based on these set policies, which include multiple check signers, separation of duties, clear guidelines on expenditure approval limits (i.e., over 5k needs a vote), safeguarding of assets and high-level criminal background checks for anyone with bank access, and invoice processing. In addition, the finance committee, in collaboration with established charter school accounting consultants, will develop systems for payroll, accounts receivable, donations and fundraisers, petty cash, and credit card usage.

Furthermore, vendors and all third-party contracts will be evaluated annually to ensure the school receives the best possible fiscal and other services delivery. By policy, board members, school leaders, and staff will be required to disclose any known or possible related party transactions (including a description of the relationship and transaction and an estimate of the dollars involved). Finally, salary negotiations for school administration members will be established using published and other readily-available comparative data to ensure that compensation is properly aligned with the marketplace.

#### Terms of Loan Agreements:

-Multiple lenders are willing to include initial start-up costs of up to \$495,000 into the school's loan. These lenders include Bay Point and DA Davidson.

#### 6. Compliance

The board (finance committee), EMO, and school leadership will maintain several internal financial controls and bookkeeping practices that provide fiscal control and accounting procedures in accordance with Generally Accepted Accounting Principles.

The EMO will act as the finance and student accounting company providing oversight of the school's leadership team, which consists of the School Director and an Instructional Coach. They (the EMO and Team) will provide timely and accurate information and report to the school's finance committee and board.

The Board will develop and approve a fiscal policy manual before the

school's opening. The finance team will write specific processes based on these set policies, which include (multiple check signers, clear guidelines on expenditure approval limits (i.e., over 5k needs a vote), safeguarding of assets, high-level criminal background checks for anyone with bank access, and invoice processing).

In addition, in collaboration with Tutelage School Solutions, our financial experts on the board will develop systems for payroll, accounts receivable, donations and fundraisers, petty cash, and credit card usage. Our vendors and third-party contracts will be evaluated annually to ensure we receive the best return on investment and are effective partners. They will provide any known or possible related party transactions (relationship, description of transaction, and estimated dollars involved).

Secondly, our partnership with Tutelage School Solutions does not provide direct funding through grants. They may provide a credit to purchase devices and access a system to utilize their marketing tools and website; however, no direct funding is exchanged.

Tutelage School Solutions, LLC will recommend third parties to the Ethos Academies Board to consider as service providers; however, the Ethos Academies Board retains all rights to approve of all contracts and may choose to select a third-party contractor not recommended by Tutelage.

The scope of work and responsibilities of TSS is spelled out in the contract listed as Appendix O, EMO/CMO Documentation, in the application, and it includes the following areas of support:

- Responsible and accountable to the Board for the administration and operation of School in accordance with its charter and its mission.

- Shall implement the educational program approved in the charter in a manner designed to achieve superior academic performance.

- Complete delegated management authority.

- Complete purchases requested by the Board.

- Grant an exclusive license to the School for proprietary material.

- Work with the Board on student recruitment.

- Recommend rules, regulations, and procedures.

- Ensure delivery of special education services

- Notify the Board of any anticipated or known issues.

## 7. GAAP and Internal Controls

The Finance Committee will be responsible for the oversight of the school's financial accounting and audit functions. Duties will include:

- Working with school leadership to draft and submit an annual budget for approval of the board.

- Meeting with the School Director and the business manager monthly to review the budget report, cash flow, and financial performance.

- Establishing fiscal policy and procedure in accordance with generally accepted accounting principles.

- Issuing the RFP and overseeing the selection process for an annual, independent auditor.

- Establishing the audit timeline and schedule for fieldwork.

- Reviewing and presenting the annual audit results to the Board of Directors for approval.

- Draft the Management Discussion and Analysis ("MD&A") that accompanies the audit report.

- Contribute to the preparation and review of the annual Form 990.

- Review potential financing/leasing instruments.

- Draft and oversee implementation of organizational and functional level internal controls.

Through its management organization, the School Director will oversee the fiscal operations of the school. He or she will be responsible for ensuring compliance with generally accepted fiscal management standards and overseeing the day-to-day implementation of fiscal policy and procedure. The School Director will also be responsible for all compliance functions and reporting.

The school will maintain accurate financial records and limit risk to ensure diligence in the expenditure of public funds. It will maintain, reconcile and monitor its financial accounts daily. The board will receive a monthly financial report that will consist of:

- Income statement (revenue and expenses) with budget comparison.

- Bank Statement and Reconciliation Report reflecting outstanding as well as cleared deposits and payments.

- Payment by vendor reports.

- General ledger summary report with account detail.

Internal controls will be reviewed and evaluated annually by an independent auditor in accordance with generally accepted audit standards.

In addition, the school will maintain an internal control checklist that the finance committee and board can refer to on a monthly basis that includes the following questions:

1. Are accounting records kept up-to-date and reconciled regularly?
2. Is the SCDOE uniform chart of accounts being utilized?
3. Are monthly financial statements issued in a timely manner, and do they adequately and accurately convey the school's financial position?
4. Are revenues being collected as and when expected?
5. Are expenses being maintained as an acceptable revenue percentage based on industry standards and the progression of the fiscal year to date?

#### 8. Outside Providers

Ethos Academies plans to subcontract with a number of outside providers for the following services:

- Audit
- Janitorial Services
- Speech
- OT
- Maintenance
- Technology Support
- Physical Therapy
- Meal Services

#### 9. Contracting with a CPA

The school will obtain a list of all Certified Public Accountants with a reliable record and history of conducting charter school audits in South Carolina and issue an RFP for audit services, which the finance committee will use to thoroughly vet the CPA firms and recommend an independent auditor to the Board.

#### 10. Retirement Benefits

The school is currently planning to forego the state retirement plan; however, the school will participate in the State Health Plan. The school will incur the costs of mandatory unemployment and workers' compensation insurance. Our Assistant Teachers will serve as a built-in recruiting source for new teachers. Many will be certified or working toward certification and candidates for open teaching positions.

#### 11. Contingency Plans

In addition to the submitted budget plan, the applicant has created a stress-test budget based on 80% enrollment. This budget is available on

request.

In the event that unforeseen circumstances occur that negatively affect revenues, two strategies will be employed depending upon the cause:

1. Assuming a shortage arising from under-enrollment, the school will increase marketing efforts and use every available resource to improve enrollment, including expanded outreach to the community, seeking referral partners, and increased exposure and visibility through advertising.

2. Assuming changes in student funding, the school will charge its finance committee with presenting a plan to reduce costs in the following order:

-1st: Reduce or eliminate non-essential fixed costs and renegotiate leases and non-instructional contracts.

-2nd: Reduce or eliminate any non-essential, non-instructional variable costs (including non-instructional and administrative salaries and benefits).

-3rd: Analyze and strategically reduce, consolidate, or combine expendable, non-essential instructional costs.

## 12. Annual Operating Budget

After careful study of data, we will base any change of direction from the original budget on facts of the school's needs. First and foremost, the academic needs of the scholars must be met. Each budget will reflect the full needs of our scholars. We will conservatively and carefully budget for all our financial obligations every year. Tutelage School Solutions will be involved with the School Director to develop a budget to present to the Finance Committee of the Board of Directors well before the end of the fiscal year for their direction, desires, and input.

The budget will be carefully monitored from month to month. It will also be regularly used as a reflective tool to measure whether or not outcomes are realistic based on actual operations. Occasionally, based on the school's financial performance, modifications to the budget may be required. In doing so, meeting the instructional needs of the students will be the top priority.

At the time of the application, the plan is to allow the School Director to move small amounts of funds between budget lines of \$2,000.00 or less. The governing board can amend that assumption anytime, but it has proved a valuable tool in managing a larger school budget.

The board will conservatively and with due care cast a budget that contemplates fulfilling all financial obligations of the school. The finance committee will manage the annual budget and begin in January or February preceding the end of the fiscal year. Budget development will also include the School Director. A draft (and subsequent drafts) of the budget will be presented to the board by the Finance Committee with the

expectation that a board vote will pass a budget for the next fiscal year by April 1st.

The finance committee will propose any significant changes or amendments to the budget and discussed and approved by the Board.

How Student Achievement Data and Mission Drive Priorities Drive Annual Budget Process:

-The academic plan for Ethos Academies is well-prepared and has been successfully used in multiple schools across the country. Even with that rock foundation in place, it is clear that each school is different, and Ethos Academies will evaluate regularly. NWEA MAP testing data will allow the development of a Student Recovery Plan for those students who do not meet or are approaching proficiency. The students on grade level or surpassing expectations will also be served and evaluated to continue to soar. These factors will be the first points considered in the budget process. Staff is essential to developing a high-achieving school culture. We will add additional Reading and Math Coaches as data reveals the needs. Our special education department will be staffed off of data to make sure all needs of all levels of students are served. These levels will be monitored and updated each year.

-The mission of Ethos Academies is to continuously develop the next generation of American citizens by developing creative, problem-solving minds through the education of the whole student. Our school will have a challenging learning environment with high expectations set in a creative and caring atmosphere to grow all individuals' intellectual, character, physical, social, and emotional sides. This mission is at the forefront of all Ethos Academies will do. The budget process will include all the needed curricula to inform students of the history and citizenship of America and be updated every year to ensure a full and rich process of development is available. The staffing process of the budget will continue to support the focus on a full education by making sure positions such as Guidance, Music, Art, and PE are not just fully staffed in year one, but the focus continues on growing those staff positions as the student body and grade levels grow. Training the staff not just on the academic side but also on the character education side will be paramount in the budget each year.

### 13. Contingency Plan

Two strategies will be employed depending upon the cause if revenue projections are not met:

1. Assuming a shortage arising from under-enrollment, the school will increase marketing efforts and use every available resource to improve enrollment, including expanded outreach to the community, seeking referral partners, and increased exposure and visibility through advertising.

2. Assuming changes in student funding, the school will charge its finance committee with presenting a plan to reduce costs in the following order:

-1st: Reduce or eliminate non-essential fixed costs and renegotiate leases and non-instructional contracts.

-2nd: Reduce or eliminate any non-essential, non-instructional variable costs (including non-instructional and administrative salaries and benefits).

-3rd: Analyze and strategically reduce, consolidate, or combine expendable, non-essential instructional costs.



## Response to Facilities

### 1. Facilities Requirements

In year one, we would need 28 regular classrooms (average 600 square feet in size), one Special Education classroom, one music room, one art room, one full gym, one office space, and storage. The classroom and overall facility needs will grow each year. For example, in Year 2, we need 25 regular education classes; in Year 3, we need 29 regular education classes; in Year 4, we need 33 regular education classes; and in year 5, we need 36 regular education classes. Our projected enrollment is as follows:

- Year 1: Grades K-6/100 scholars per grade = 700 scholars enrolled.

- Year 2: K-7/100 scholars per grade = 800 scholars enrolled.

- Year 3: K-8/100 scholars per grade = 900 scholars enrolled.

We reserve the right to grow to full capacity during or any time after Year 3 if applications/waitlist allows and if allowable by the Charter Institute at Erskine.

### 2. ADA Compliance

The school will be fully ADA-compliant. The school will also meet and exceed all square footage requirements as set forth by the state.

### 3. Virtual Schools

This question does not apply to the Ethos Academies - Kershaw application.

### 4. Identified Facility

This question does not apply to the Ethos Academies - Kershaw application.

### 5. Facility Plan

Ethos Academies intends to work with DA Davidson and True North to either stick-build a new facility or renovate an existing structure. True North would assist with facility development, and DA Davidson would provide financial services.

### 6. Facilities Plan Alignment with Enrollment

The initial building will be suitable for 800 scholars. An additional building or structure will be completed by year 3, whether on the existing campus or another campus located conveniently for all families.

#### Facility:

- Classrooms will be of a size to reflect the needs of the students and staff. The goal is for each classroom to have a minimum of 30 feet per student.

- Technology will be available in each room and throughout our building. "Smart Board" type equipment will be in each classroom with document cameras. Wireless internet will be more than sufficient throughout the building for the needs of students and staff.

-Each aspect of the school will equal or surpass all Office of School Facilities regulations.

-Natural light will be in each room in our facility used by students.

-Smaller meeting rooms for individual instruction will also be scattered on the complex.

-A complete camera system will be installed by the end of year one to allow for both hallway and classroom monitoring by approved administration at all times.

-Outdoor classroom opportunities will also be available.



## Appendices and Additional Information

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**Evidence of Support (Appendix Item C)** <https://www.formstack.com/admin/download/file/14100830225>

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**School Calendar and Daily Schedule for the Academic Year (Appendix Item F)** <https://www.formstack.com/admin/download/file/14100830226>

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**Support Documents for the described Educational Plan (Appendix Item G)** <https://www.formstack.com/admin/download/file/14100830227>

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**List of Teaching Positions (Appendix Item H)** <https://www.formstack.com/admin/download/file/14100830228>

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**Charter Committee (Appendix Item K)** <https://www.formstack.com/admin/download/file/14100830229>

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**Bylaws (Appendix Item L)** <https://www.formstack.com/admin/download/file/14100830230>

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**Articles of Incorporation (Appendix Item M)** <https://www.formstack.com/admin/download/file/14100830231>

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**Organizational Chart (Appendix Item N)** <https://www.formstack.com/admin/download/file/14100830232>

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**Sample Job Descriptions (Appendix Item P)** <https://www.formstack.com/admin/download/file/14100830233>

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**School Start-Up Plan (Appendix Item Q)** <https://www.formstack.com/admin/download/file/14100830234>

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**Draft Discipline Policy (Appendix Item T)** <https://www.formstack.com/admin/download/file/14100830235>

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**Student Enrollment Projection Form (Appendix Item V)** <https://www.formstack.com/admin/download/file/14100830236>

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**Five Year Budget [must be in Excel] - (Appendix Item X)** <https://www.formstack.com/admin/download/file/14100830237>

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**Ten Year Budget [must be in Excel] - (Appendix Item Y)** <https://www.formstack.com/admin/download/file/14100830238>

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**Documentation of Any "Soft Funds" (Appendix Item AA)** <https://www.formstack.com/admin/download/file/14100830239>

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**Applicable Insurance Documentation (Appendix Item FF)** <https://www.formstack.com/admin/download/file/14100830240>

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**Description Area**

Additional Appendix Items The remaining appendix items listed below, are required \*as applicable. You may combine multiple files into one upload by compressing/"zip" them into one folder/file. Please view the resource guide on tips how to do so. (Appendix Item B) Evidence of Notification (to both the local school board of trustees and local delegation)\* (Appendix Item D) Conversion School Support\* (Appendix Item E) Private School Documentation\* (Appendix Item I) Virtual School List of Courses\* (Appendix Item J) Agreement with Sponsoring District for Special Education Services\* (Appendix Item O) EMO/CMO Documentation\* (Appendix Item R) Letter of Agreement from Sponsor Regarding Compliance with S.C. Code Ann. § 59-25-410 et seq. (2004)\* (Appendix Item S) Letter(s) from Sponsoring District Regarding Desegregation Plan or Order\* (Appendix Item U) Transportation Services Contract\* (Appendix Item Z) Memorandums of Agreement for Negotiated Services\* (Appendix Item BB) Floor Plan of Identified Facility\* (Appendix Item CC) Proposed Lease or Rental Agreement\* (Appendix Item DD) Documentation from the SCDE's Office of School Facilities\* (Appendix Item EE) Documentation from the SCDOT School Traffic Engineering\*

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**Additional Appendix Items - upload attachments \*as applicable.**

<https://www.formstack.com/admin/download/file/14100830241>

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**Additional Appendix Items - upload attachments \*as applicable.**

<https://www.formstack.com/admin/download/file/14100830242>

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## Addenda for the Charter Institute at Erskine (CIE)

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**Please upload the Racial Composition Addendum here.** <https://www.formstack.com/admin/download/file/14100830243>

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**Has your planning team applied for a charter in the past?** No

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**Will your Charter School be an Alternative Education Campus (AEC)?** No

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**Does your school plan to enter a contract or lease agreement with a church or other religious organization?** No

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## Signature Certification Page

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**Name of Proposed Charter School** Ethos Academies - Kershaw

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**City, State, and Zip Code for Proposed Charter School** Camden, SC 29020

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**Name of charter and/or education management organization (CMO/EMO)** Tutelage School Solutions

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**Proposed Sponsor** Charter Institute at Erskine

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**Description Area** Certification: I hereby certify that, to the best of my knowledge, the information and data contained in this application are true and correct. The applicant's governing body has duly authorized this application and documentation, and the applicant will comply with the South Carolina Public Charter School Statement of Assurances if the charter school is approved.

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**Signature of Charter School Committee Chair**

  
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**Date** February 01, 2023

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