



School Governance and Leadership

Jared L. Taylor

Jared L. Taylor is a second-generation charter school operator. His father, Earl Taylor, was a first-year charter operator in Arizona and mentored Jared for eight years before retiring. Jared has a Bachelor's degree in Management (with concentration in human resource management) and Master of Business Administration (MBA) degree from Arizona State University. He also has formal training and certifications in Six Sigma and LEAN programs. Jared had a rich corporate career, including more than a decade in HR technology, operations management, staffing, and team building at Honeywell and Motorola, before becoming Heritage Academy Schools' business manager in 2009.

Experience is a major asset that Jared brings to Heritage Academy Schools' growth management and replication plans. Expanding our educational opportunities to include preschool with Liberty Kids, answers the call by families for early learning with the Heritage Academy mission. Jared was the chief architect of one of the first District-Charter partnerships to build a strong academic and career technical education experience specifically to address the growing crisis with our youth experiencing foster care. This year, Heritage Academy Schools celebrate 30 years of success in education. Implementing success metrics, championing good citizenship to build good character in our scholars so they can contribute meaningfully to our community is the mission carried out daily, impassioned by Jared's leadership.

Enjoying service, you will see Jared active in his community in many capacities. He volunteered and served on the board of several nonprofits and in 2012 was elected to the Gilbert Town Council, where he served in one of the fastest-growing cities/towns in the U.S. with more than 260,000 residents. Jared was reelected to the Town Council in 2016 and was also appointed by Arizona Governor Doug Ducey to serve on the Arizona State Board of Education in 2015. With Jared's experience in building teams, operations, finance, community and municipal planning, Heritage is uniquely positioned to be successful in operating as a not for profit group of 501(c)3 charter schools.

Proceeds of Giving

Heritage Academy Schools maintain public school charter status and receive government funding, however, the funds received via Giving will enhance our schools providing the following goals: Student Scholarships (Academics, the Arts and Athletics), Teacher Rewards, Debt Reduction, Enhanced Technology, Enhanced Facilities and Innovative Learning Programs. Giving is gratefully received via cash, credit card, stocks, Donor Advised Funds, Charitable Remainder Trusts, Legacy Giving, Tax Credits, Individual Retirement Accounts, assets and long term partnerships via Raise a Generation. Distressed assets may not be transferred without prior permission.

Decision Making

Primary decision-making authority on all academic and operational matters resides with each school's Governing Board. The Governing Board at Heritage Academy Inc, Heritage Academy Schools: Gateway, Laveen, Mesa, Pointe, Pinnacle, Liberty Kids and Paul Revere Academy, formulates the policies for the school – scholar, fiscal, and employee – and provides direction on many topics including financial statements, curriculum development, and other administrative matters. Annual budgets, financial audits, and compliance processes

provided to the AZ State Charter Board are reviewed and accepted by the Governing Board with a majority vote. Open Meeting Laws are strictly followed. Robert's Rules enable a free flow of discussion and decision making within the Governing Board. Copies of the meeting notes are made publicly available on demand. All members of the Governing Body are required to have a current Fingerprint Clearance Card issued by the Arizona Department of Public Safety.

Fiscal Accountability

The success of Heritage Academy Schools, Liberty Kids and Paul Revere Academy's education model is found in the creation of a sustainable system with formalized processes to provide adequate human, material, and fiscal resources to implement educational programs in a long-term, sustainable manner, as evidenced by 30 years of existence of the school and the successful renewal of its charter contract.

Fiscal Resources

The Governing Board has the responsibility for the financial viability of the school. The Board will oversee formulating financial policies, approving the procedures, and monitoring the implementation of all major financial decisions, which will ensure that the administration and management will operate the school in a fiscally responsible and accountable way. Those policies and procedures would also target the development of organizational culture sensitive to the use of public finance and taxpayer dollars, and proper understanding that such resources should be invested with the ultimate goal to return excellence in education and high level of scholar achievement and to prepare responsible citizens. Any procurement of goods and services will be made in the best interest of the school, considering cost effectiveness and best fit to the school needs. The Board will follow federal and state guidelines, rules, and requirements when contracting for services for federally or state-funded projects

Annually, the Board will adopt a detailed budget with anticipated categories and amounts of expenditures; it will also oversee and monitor the budget's implementation.

- The Board will review all major financial projections and reports – audit (annually), AFR (annually), monthly cash flows, balance sheet, and income statements (semi-annually).
- The Board will review the report and decide on the most cost-efficient allocation of resources in support of the educational model.
- The Board will direct development of procedures and processes to monitor the school finances and their management.
- The Board will perform periodic evaluation of fiscal policies and procedures and will revise and adopt new ones upon identified needs.
- The Board will arrange for an independent financial audit to be conducted by a licensed independent auditing firm annually as required by the charter contract.
- The Board will ensure that the charter authorizer receives the auditor's report for review by the prescribed deadline.
- The Board will review and understand all state and local policies and legislative processes that have an impact on the school's finances.
- The Board will establish fundraising, philanthropic Giving policies which are conducted via our Giving pages on all our Heritage Academy, Liberty Kids and Paul Revere Academy website.

Heritage Academy Inc are not tax or financial advisors. The information provided is general information readily publicly available. It is recommended you consult your legal advisor or lawyer for advice specific to your needs.