

Terrell Independent School District

Executive Summary Report

Date	District Objective	
September 21, 2026	Goal 4: Organizational Efficiency: Develop a resource allocation plan and long-term facilities plan that supports and maintains the financial stability of the district, is aligned with identified priorities, addresses future growth and facility improvement needs, and represents being good stewards of taxpayer funds.	

Agenda Item: Consider Resolution Approving Independent Sources of Training Relating to Investment Responsibilities

Summary:

In accordance with Board Policy CDA (LEGAL) Other Revenue: Investments, all District investment officers must complete initial and on-going investment training requirements from Board approved investment training providers.

The independent sources of instruction relating to investment responsibilities were reviewed by staff and are being recommended for approval as presented in the attached resolution.

Attachments:

Resolution Approving Independent Sources of Training Relating to Investment Responsibilities

Administrative Recommendation:

It is the recommendation of the Superintendent that the Board of Trustees executes the resolution approving independent sources of training relating to investment responsibilities.

Budget/Funding

N/A