**Agenda IV.B.2.**
**November 12, 2026**

**To:** Board of Education
Dr. Chris Bellmont, assistant superintendent

**From:** Tyler Dehne, director of finance

**Date:** November 12, 2026

**Re:** Approve, on a First Reading Basis, Changes to Policy 705.2: *Other Post-Employment Employee Benefits (OPEB) Investments*

**Recommendation**: That the Board of Education approve, on a first reading basis, changes to Policy 705.2: *Other Post-Employment Employee Benefits (OPEB) Investments.*

## Notes:

- PTMA Financial Solutions presented information regarding the OPEB Trust assets and future liabilities at a board work session in May 2026
- Policy 705.2 was reviewed during the October 20, 2026 Policy Review Committee
- The recommended change is to increase the maximum equity portion of the OPEB Trust portfolio from 31% to 57%