



Board Action Required ☒

No Action Required ☐

To: Coppell ISD Board of Trustees

From: Diana Sircar

Date: September 29, 2025

cc: Mr. Doug Williams, Ms. Erica Devould

Re: 2025-2026 Annual review of CDA Legal and Local, and adoption of a resolution regarding Investment Policy and Strategies for CDA Local.

The Public Funds Investment Act, Section 2256.005(e) of the Texas Government Code requires the Board of Trustees to annually review and approve the district's local investment policy and strategies.

The investment policies must primarily emphasize safety of principal and liquidity; address investment diversification, yield, and maturity and the quality and capability of investment management; and include a list of the types of authorized investments in which the district's funds may be invested.

Policy CDA (Legal) is dated 10/30/2023. Policy CDA (Local) is dated 1/8/2025 and was adopted by the Board on 2/24/2025.

RECOMMENDATION: Board of Trustees approves the resolution for CDA Local policy as presented.