



Board of Trustees Agenda Item

Date:	September 15, 2025
Agenda Item	Annual Investment Policy Review
Policy Reference	CDA (Legal / Local)
Strategic Goal	Fiscal Responsibility
Department	Finance Division

Recommendation

The Superintendent recommends the Board of Trustees approve no recommendations to update board policy CDA Local as presented.

Summary

The Board shall review and adopt by resolution this investment policy and investment strategies not less than annually and shall document its review in writing, which shall include in the resolution any changes made to either the investment policy or investment strategies.

Rationale

Policy has been reviewed by Wesley Scott, Chief Financial Officer. No changes are recommended at this time.

Recommended by: Dr. Kristin Craft - Superintendent

Submitted by: Wesley Scott – Chief Financial Officer

Suggested Motion

The Board of Trustees approve the recommendation to investment policy CDA Local as presented.