



Gregory-Portland Independent School District

BOARD MEMORANDUM

TO: DR. MICHELLE CAVAZOS

FROM: DR. ISMAEL GONZALEZ III

CC: BOARD OF TRUSTEES
PENNY ARMSTRONG
DR. MICHAEL NORRIS
MICHAEL THIEME
DEBORAH GARZA

DATE: Monday, July 21, 2025

SUBJECT: CONSIDER APPROVAL OF A RESOLUTION ON ANNUAL REVIEW OF INVESTMENT POLICIES AND STRATEGIES

PRIORITIES

PRIORITY 1: EXCEPTIONAL STUDENT PERFORMANCE

N/A

PRIORITY 2: HIGH PERFORMING AND ENGAGED WORKFORCE

N/A

PRIORITY 3: QUALITY SERVICE AND IMPACTFUL COMMUNITY ENGAGEMENT

N/A

PRIORITY 4: EFFICIENT AND EFFECTIVE DISTRICT AND CAMPUS OPERATIONS

4.2 Maintain fiscal viability; stewardship; and improve staff knowledge of sustainable budgeting processes

BACKGROUND INFORMATION:

Type: Consent

The board shall review its investment policy and investment strategies not less than annually. The board shall adopt a written instrument by rule, order, ordinance, or resolution stating that it has reviewed the investment policy and investment strategies and that the written instrument so adopted shall record any changes made to either the investment policy or investment strategies. Gov't Code 2256.005(e).

RECOMMENDATION:

Administration recommends the Board approve a resolution on annual review of Investment Policies and Strategies which includes changing the maximum allowable stated maturity of any one investment to not exceed three years from the time of purchase; current policy limits the stated maturity to one year. This recommendation aligns with Priority 4.2 and 4.3 of the district's Balanced Score Card which will allow for strategic laddering of investments that are conducive to current market conditions while maintaining standards of care in accordance with Gov't Code 2256.006.

FINANCIAL IMPACT:

N/A

BOARD RELATED POLICY:

CDA(LEGAL), CDA(LOCAL

ACTION ITEM SUGGESTED MOTION (if applicable):

N/A