



## BOARD OF TRUSTEES RATIONALE/ABSTRACT (Item sheet)

### AGENDA ITEM TITLE: **2024 Annual Investment Review and Resolution**

Reports/Information  Presentation/Discussion  Consent  Action

**PRESENTER:** Grant Miller

**MEETING DATE:** February 10, 2025

#### **RECOMMENDATION:**

The Kaufman ISD Board of Trustees vote to adopt the resolution approving the investment policy and strategies of the district, as recommended by the administration.

#### **Motion Language:**

***"I move that the Kaufman ISD Board of Trustees vote to adopt the resolution approving the investment policy and strategies of the district, as recommended by the administration."***

#### **BACKGROUND:**

According to Policy CDA (Legal) and CDA (Local), an annual report shall be presented to the Board of Trustees regarding the investment program, investment activities, and strategy. Investments in the State of Texas are governed by Chapter 2256 of the Texas Government Code. All investments made by the District shall comply with the Public Funds Investment Act and all federal, state, and local statutes and regulations. The Board of Trustees must act upon an annual review of the District's investment policy and strategies.

#### **POLICY:**

CDA (Legal) and CDA (Local)

#### **BUDGET IMPACT:**

#### **GOALS:**

- Goal 1:** Improve Student Achievement
- Goal 2:** Improve Student Career and College Readiness
- Goal 3:** Recruit, Retain, & Train Fully Certified and Highly Qualified Principals, Teachers, and Staff
- Goal 4:** Improve Student Programs & Services
- Goal 5:** Provide a safe and orderly learning environment

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**PREPARATION ★ PURPOSE ★ PRIDE**