

Grand Prairie ISD Board of Trustees

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Topic: Investment Officer Training Sources

Submitted by: Tracy Ray, Deputy Superintendent of Business Operations

Approved for Transmittal: *George Aneduto*

Board Meeting Date: 7/18/2024

Recommendation:

The Public Funds Investment Act (Government Code 2256.008) requires that investment officers of the District attend at least one training session from an independent source approved by the governing body of the District as provided for in the investment policy of the District and containing at least 10 hours of instruction relating to the investment officer's responsibilities within 12 months of taking office or assuming duties. In addition, investment officers of the District are required to receive a minimum of 8 hours of instruction relating to investment responsibilities every two years.

Rationale:

The Administration recommends that the Board approve the following investment officer training sources:

Weaver & Tidwell, LLP	AICPA	TASB
Deloitte & Touche, LLP	ASBO	TASBO
Education Services Centers	FDIC	TexasCLASS
Patterson & Associates	GFOA	TexasTERM
Texas Comptroller of Public Accounts	GTOT	TexStar
Texas State Board of Public Accountancy	LOGIC	TexPool
The PFM Group	TASA	Lone Star (First Public)
UNT Center for Public Management	Texas Municipal League (TLM)	
North Central Texas Council of Governments		

Budget Information:

Board Policy Reference and Compliance:

Policy CDA(LEGAL) and CDA(LOCAL)