



# Board of Trustees Agenda Item Information Form

Date Submitted: May 4, 2026

Meeting Type	Agenda Placement	Code	Agenda Placement	Code
<input checked="" type="checkbox"/> Regular Meeting	<input type="checkbox"/> Public Hearing	PH	<input type="checkbox"/> Administrative Report	AR
<input type="checkbox"/> Special Meeting/Workshop	<input type="checkbox"/> Executive Session	ES	<input checked="" type="checkbox"/> Consent Agenda	CA
	<input type="checkbox"/> Recognition	R	<input type="checkbox"/> Action Item	AI
	<input type="checkbox"/> Program Spotlight	PS	<input type="checkbox"/> Information/Discussion	ID
	<input type="checkbox"/> Community Input	CI		

Meeting Date: May 18, 2026

**District Strategies (Check all that apply):**

- Students and staff will thrive in a secure environment, build connections and community, and become resilient leaders.
- Each student will engage in world-class learning experiences that foster curiosity, develop talents, guide exploration, and fuel achievement.
- We will cultivate innovation through strategic collaboration and responsive organizational stewardship.

**Subject:**

Consider Approval of Investment Training Providers

**Background:**

In accordance with the Texas Public Funds Investment Act, each investment officer of the District must attend an investment training session not less than once in a two year period and receive not less than eight hours of instruction relating to investment responsibilities from an independent source approved by the governing body of the local government.

Daily investment decisions are handled by the Controller (primary investment officer) based on guidance and recommendations from the District Investment Management Advisors, Hilltop Securities. Alternate investment officers include the Chief Financial Officer and Assistant Director of Treasury Management.

See attachment A for a list of recommended training providers.

**Fiscal Impact Statement**

**Cost:** \$0.00

- Recurring
- One-Time

**Funding Source:**

- General Fund
- Grant Fund
- Other Funds (specify)

Fiscal Year: 2025 / 2026

Amendment Required: N/A

Bond Funds (program year): N/A

**Superintendent's Recommendation:**

It is the recommendation of the Superintendent that the Board of Trustees approve the attached list of Investment Training Providers.

**Department Submitting Form:** Finance

**Cabinet Member's Approval:** Alice Benzaia