



Agenda of Regular Meeting

The Board of Trustees Belton Independent School District

A Regular Meeting of the Board of Trustees of Belton Independent School District will be held September 21, 2026, beginning at 6:15 PM in the Pittenger Fine Arts Center, 400 N. Wall Street, Belton, TX 76513. One or more trustees may participate via video conference.

The subjects to be discussed or considered or upon which any formal action may be taken are listed below. Items do not have to be taken in the same order as shown on the meeting notice.

1. Call to Order, Moment of Silence and Pledge of Allegiance

2. Recognitions

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- A. Student Pledges - Lakewood Elementary School
- B. Student Showcase - BeginFin
- C. Second Grade National Math Stars Qualifiers
- D. Third Grade National Math Stars Qualifiers
- E. National Math Stars
- F. Purple Star Campus Designations
- G. Department Showcase - Safety & Security
- H. Community Partner Recognition - American Heart Association & Casey's General Stores

3. Public Comments Regarding Items on the Agenda

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C. Consultation with Attorney - Texas Government Code, Section 551.071	
D. Superintendent's Contract - Texas Government Code Section 551.071	
9. Reconvene in Open Session	
10. Adjourn	

Belton Independent School District
Board of Trustee Meeting Agenda Item
September 21, 2026

Item: Recognitions

Contact Person: Christine Parks

Presented for: ☐ Action ☒ Report Only

Supporting Documents: ☒ None ☐ Attached ☐ Provided Later

District Priority or Strategic Objective:

Priority 1: Students - Ensure exceptional learning experiences that bring our “Journey of a Graduate” to life for each and every student.

Priority 2: Staff - Attract, support, and retain exceptional educators and staff to ensure every student is guided and supported by an outstanding team.

Background Information:

Student Pledges – Lakewood Elementary School

This evening, the pledges were led by first grader Eleanor Graham and fourth grader Hank Swindle from Lakewood Elementary School.

Eleanor's favorite subject is science because she loves doing experiments, especially ones that explode! Outside of school, she enjoys playing on her playground at home. Her friends describe her as kind, sweet and a great friend.

Hank and his brother, Luke, are both new to Lakewood this year after moving from Kansas. Hank's favorite subject is also science because he enjoys using cool tools. Outside of school, he loves eating pizza, spending time with his family and watching TV. His friends describe him as kind, helpful and respectful.

Student Showcase - BeginFin

Tonight's Student Showcase featured Lake Belton High School seniors Vishnu Kakarla, founder, and Kruz Smith, co-founder, creators of BeginFin, a student-created financial literacy platform designed to make personal finance more interactive, accessible and engaging.

What began as preparation for a Business Professionals of America competition has grown into a global resource reaching users in more than 25 countries. BeginFin is now integrated with Google Classroom and has expanded beyond K-12 education, with college professors also using the platform with their students.

The continued growth of BeginFin showcases the innovation, entrepreneurship and real-world problem-solving happening in Belton ISD classrooms.

Second Grade National Math Stars Qualifiers

Tonight, we recognize Belton ISD third-graders whose exceptional performance in mathematics as second graders placed them among the top 5% of students nationally.

Last year, 72 second-graders reached that distinction on the Renaissance Star Assessment in math, qualifying them for the opportunity to apply to the National Math Stars program.

Their achievement is part of a much bigger story in Belton ISD, where exceptional young mathematicians are being identified early and given opportunities to grow their talents.

Third Grade National Math Stars Qualifiers

Belton ISD is also celebrating 89 fourth-graders who earned the opportunity to apply for the National Math Stars program after outstanding performance on the Renaissance Star Assessment in math.

These students scored among the top 5% nationally, contributing to a combined 161 Belton ISD second- and third-graders who reached that level of mathematical achievement this year.

Tonight, we celebrate these students for their hard work and achievement as they continue to be challenged, grow and pursue their talents in mathematics.

National Math Stars

Tonight, we celebrate six Belton ISD elementary students named 2026 National Math Stars finalists: Apollo Barth, Brayden Marin and Hazel Sanderford of Lakewood

Elementary; Brodie Durfee of Joe M. Pirtle Elementary; and Katie He and Yunjae Jeong of Sparta Elementary.

From this group, Apollo and Katie advanced to become National Math Stars, joining just over 600 students selected from nearly 9,000 nationwide. They will receive 10 years of individualized support, including academic advising, tutoring, technology and enrichment opportunities.

From 161 students performing among the top 5% nationally to six finalists and two National Math Stars, Belton ISD is identifying exceptional young mathematicians early and giving them opportunities to see just how far their talents can take them.

Purple Star Campus Designations

Belton ISD is proud to recognize Hubbard Branch Elementary and James L. Burrell Elementary for earning the Purple Star Campus Designation from the Texas Education Agency. As the district's two newest campuses, both earned this distinction less than three years after opening.

The Purple Star designation recognizes schools for their commitment to meeting the unique needs of military-connected students and families. With nearly 30 percent of Belton ISD students identified as military-connected, this recognition reflects the intentional work happening on our campuses to help students feel welcomed, connected and supported.

Hubbard Branch and Burrell join Belton High School, Lake Belton Middle School, High Point Elementary and Charter Oak Elementary as Belton ISD's six currently designated Purple Star campuses, continuing the district's commitment to serving those who serve our nation.

Department Showcase: Safety & Security

Tonight's department showcase highlights the Belton ISD Safety and Security team, which works each day to provide safe and secure learning environments across the district.

Led by Director Doug Taylor, the team includes 34 crossing guards, 10 school resource officers and 19 armed security guards. Beyond campus safety, team members build relationships with students and serve as an important connection between our schools and community.

We thank the Safety and Security team for their commitment to protecting and supporting each and every student.

Community Partner Recognition – American Heart Association & Casey's General Stores

Tonight, we are proud to recognize the American Heart Association and Casey's General Stores for their partnership and investment in the safety of Belton ISD students and staff.

Through our partnership with the American Heart Association and a generous gift from Casey's General Stores, Belton ISD received 12 CPR in Schools Kits valued at more than \$8,700. These kits provide hands-on CPR training resources for campuses across the district, expanding access to lifesaving skills for students and staff.

We are grateful to the American Heart Association and Casey's General Stores for helping equip our schools with resources that can make a difference when every second counts.

Fiscal Implications:

None.

Administrative Recommendation(s):

None.

Belton Independent School District
Board of Trustee Meeting Agenda Item
September 21, 2026

Item: Consider, Discuss, and Take Appropriate Action Regarding Adoption of the 2026-2027 Campus Objectives

Contact Person: Dr. Michael Morgan

Presented for: ☒ Action ☐ Report Only

Supporting Documents: None ☒ Attached ☐ Provided Later

District Priority or Strategic Objective:

Priority 1: Students - Ensure exceptional learning experiences that bring our “Journey of a Graduate” to life for each and every student.

Priority 2: Staff - Attract, support, and retain exceptional educators and staff to ensure every student is guided and supported by an outstanding team.

Priority 3: Community - Grow meaningful engagement and partnerships with parents, staff, and community members in support of our shared vision for each and every learner.

Priority 4: Fiscal Management - Maximize student experiences through transparent, strategic, and sustainable fiscal management.

Background Information:

Texas Education Code 11.251(a) requires the district to develop, review, and revise district and campus goals and objectives each year. The Board of Trustees approved the Strategic Objectives aligned to the Strategic Plan during the April 20, 2026 Board meeting. Campus staff have developed objectives and outlined actions aligned to the District's priorities. The administration will ask the Board to consider, discuss, and take appropriate action on the campus objectives.

Fiscal Implications:

N/A

Administrative Recommendation(s):

To adopt the 2026-2027 campus objectives as presented.



Consider, Discuss, and Take Appropriate Action Regarding Adoption of the 2026-2027 Campus Objectives

BELTON ISD BOARD OF TRUSTEES
REGULAR BOARD MEETING
September 21, 2026





Purpose

Discuss and request approval of the 2026-2027 Campus Objectives.



Destination 2031: Strategic Plan

Vision, Mission, Values & Beliefs, District Priorities

Inspiring **Dreams**. Empowering **Futures**.

Trust

Empowerment

Adaptability

Community

High Expectations

Empower **each and every learner** to pursue their dreams and enrich their communities.

Priority One: Students

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Priority Two: Staff

Priority Three: Community

Priority Four: Financial Management

System Alignment

District Priorities

**District
Performance
Objectives**

Campus Objectives¹²

Campus Objectives

Belton Independent School District

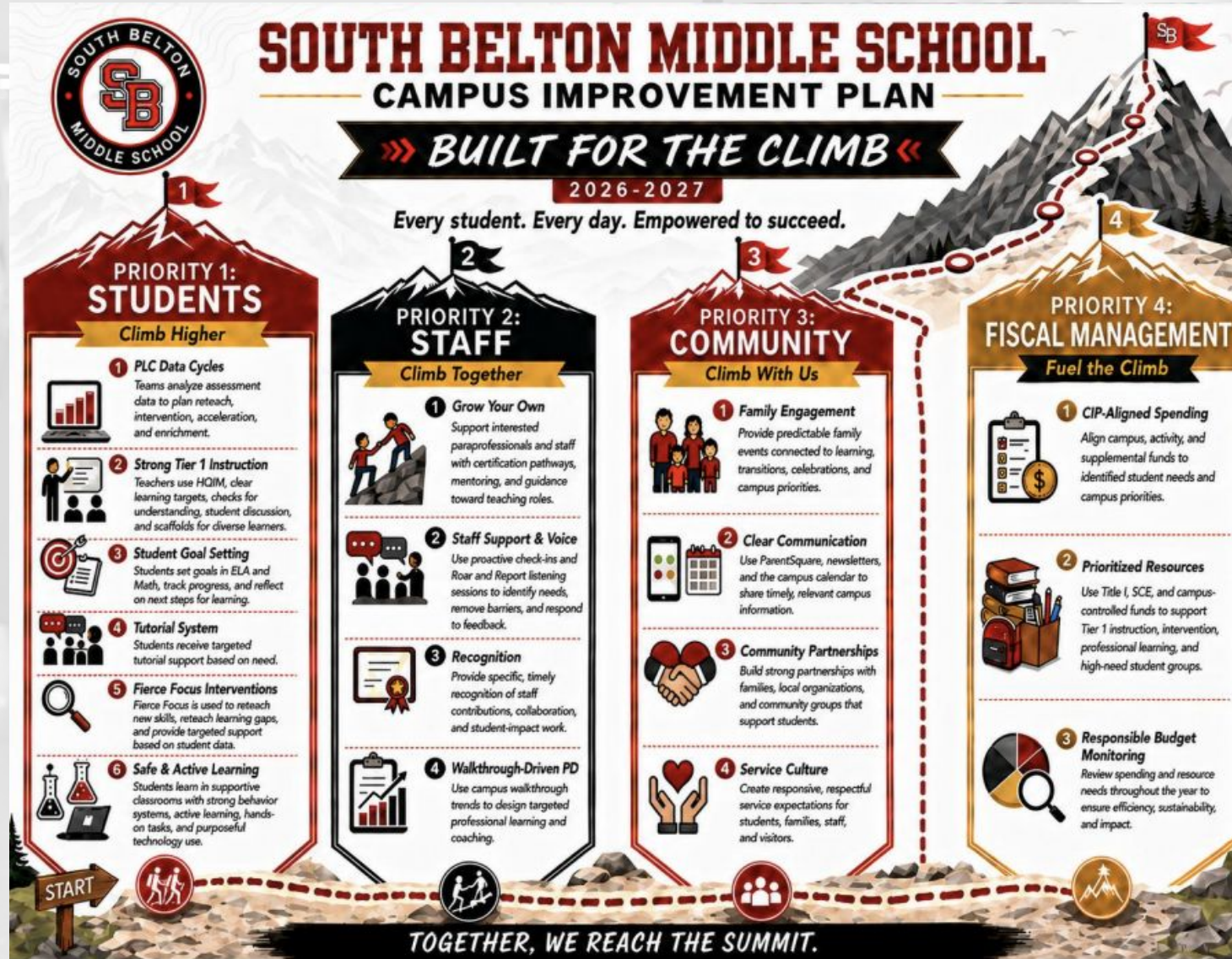
North Belton Middle School

2026-2027 Goals/Performance Objectives/Strategies

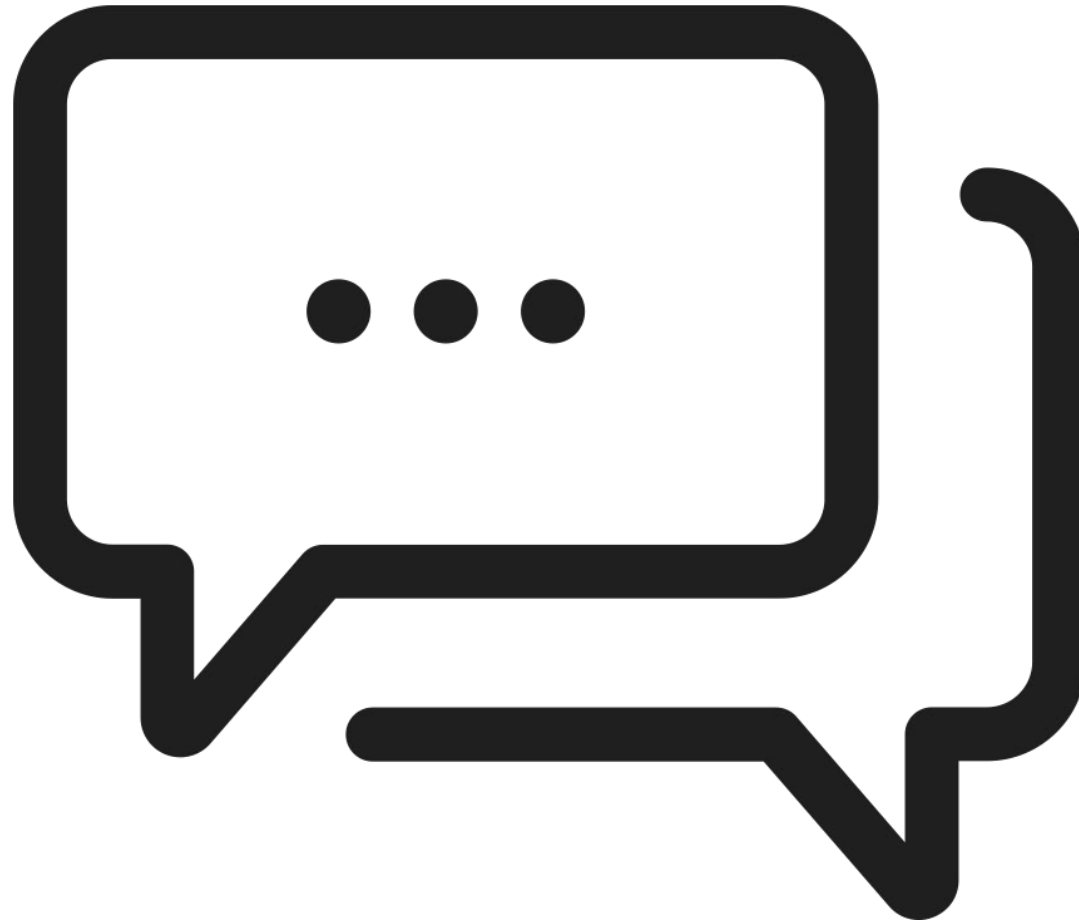


Strategy 1 Details	Reviews			
	Formative			Summative
	Oct	Jan	Apr	June
Strategy 1: Expand real-world learning by extending Career and Technical Education (CTE) in mentorships into middle schools. Strategy's Expected Result/Impact: By May 2027, at least 90% of students participating in CTE mentorships and real-world learning experiences will demonstrate increased awareness of career pathways and the connection between academic learning and future opportunities, as measured by pre- and post-experience student surveys, reflections, and career exploration activities. Additionally, 90% of participating students will be able to identify at least one career pathway and the academic skills or coursework connected to that pathway. Staff Responsible for Monitoring: Principal, Assistant Principals, and Counselors				
No Progress Accomplished Continue/Modify Discontinue				

Campus One-Pager



Discussion



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Belton Independent School District
Board of Trustee Meeting Agenda Item

September 21, 2026

Item: Consider, Discuss, and Take Appropriate Action to Approve Certificate of Compliance with Certain Laws Required by Texas Education Code Section 39.008

Contact Person: Dr. Michael Morgan

Presented for: ☒ Action ☐ Report Only

Supporting Documents: ☐ None ☒ Attached ☐ Provided Later

District Priority or Strategic Objective:

Priority 3: Community - Grow meaningful engagement and partnerships with parents, staff, and community members in support of our shared vision for each and every learner.

Background Information:

Senate Bill 12 (89th Texas Legislature), effective September 1, 2025, added Texas Education Code § 39.008, requiring superintendents to certify annual district compliance with TEC § 11.005 (prohibitions on Diversity, Equity, and Inclusion duties) and TEC § 28.0022 (instructional and parental rights requirements).

To meet the annual September 30 deadline for electronic submission to the Texas Education Agency (TEA), the Board must approve the certification by a majority vote at a public meeting that provides an opportunity for public testimony and is posted on the District website at least seven days prior.

The submitted certification must include descriptions of required compliance policies, procedures, and employee/contractor notifications; details on any policies, programs, procedures, or trainings altered or eliminated to ensure compliance; and any cost savings achieved through these compliance actions.

Following submission, TEA will publish the District's certification on its public website.

Fiscal Implications:

N/A

Administrative Recommendation(s):

Approve the Certificate of Compliance with Certain Laws Required by Texas Education Code Section 39.008, as presented.

Consider, Discuss, and Take Appropriate Action to Approve Certificate of Compliance with Certain Laws Required by Texas Education Code Section 39.008

BELTON ISD BOARD OF TRUSTEES
REGULAR BOARD MEETING
September 21, 2026



Purpose

Provide the Board of Trustees with the compliance details needed to approve and submit Belton ISD's annual TEC § 39.008 Certificate of Compliance to the TEA.

Sec. 39.008 Compliance: Public Notice & Board Approval

- ✓ **Post meeting notice at least 7 days prior to the public meeting.**
- ✓ **Hold a public meeting that allows an opportunity for public testimony.**
- ❑ **Secure approval of the compliance certification by a majority vote of the Board of Trustees or governing body.**

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Sec. 39.008 Compliance: Documentation & Required Contents

- ✓ Include a description of policies and procedures required by Sections 11.005(c) and 28.0022(h).
- ✓ Detail how district/school employees and contractors were notified of these policies and procedures.
- ✓ Identify any existing policies, programs, procedures, or trainings altered to comply with Sections 11.005, 28.0022, or 39.008. 20
- ✓ Document any cost savings resulting from compliance actions taken by the district or school.

Sec. 39.008 Compliance: Official Submission

Next Steps

- ☐ Submit the completed certification electronically to the Texas Education Agency (TEA).
- ☐ Ensure electronic submission is completed no later than September 30 of the current year.

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Discussion



TEC §39.008: Certification of Compliance with Certain Laws Required

Section 1: School System Information

Name of School District: Belton Independent School District

County-District Number (CDN): 014-903

Superintendent/CEO Name: Malinda Golden

Certification School Year: 2026-2027

Section 2: Description of Required Policies and Procedures

The following policies were all updated and board-approved to ensure compliance with TEC, §§11.005(c) and 28.0022(h).

BJA(LEGAL) - Superintendent: Qualifications and Duties

BJCF(LOCAL) - Superintendent: Nonrenewal

BT(LEGAL) - Prohibition on Diversity, Equity, and Inclusion Activities

CJ(LEGAL) and **CJ(LOCAL)** - Contracted Services

CMD(LEGAL) - Equipment and Supplies Management: Instructional Materials Care and Accounting

DF(LEGAL) - Termination of Employment

DG(LEGAL) - Employee Rights and Privileges

DH(LOCAL) - Employee Standards of Conduct

EMB(LEGAL) - Miscellaneous Instructional Policies: Teaching About Controversial Issues

Notification:

Staff Notification 2025: The Belton ISD Board of Trustees adopted a Resolution Regarding Senate Bill 12 and Parental Rights on September 15, 2025. Each Campus and department distributed physical copies of the resolution and emailed the resolution to each employee on September 26, 2025.

Staff Notification 2026: All Belton Independent School District employees received the required Notice to Employees, Contractors, Vendors, and Service Providers by email on September 3, 2026. Each campus and department distributed physical copies to each employee on September 4, 2026.

Vendor, Contractor, and Service Provider Notification: All current vendors, contractors, and service providers received the required Notice to Employees, Contractors, Vendors, and Service Providers by email on September 9, 2026. A physical copy of the notification was mailed to each vendor, contractor, and service provider on September 11, 2026.

Section 3: Policy or Program Changes

Were any existing policies, programs, procedures, or trainings altered to ensure compliance with TEC, §§39.008, 11.005, and 28.0022? **Yes**

If yes, describe or attach a copy of the changes below.

1. **Purchasing and Procurement:** To ensure compliance with Texas Education Code Section 11.005(b) & (c) under SB 12, our organization prohibits all district employees, contractors, and volunteers from assigning, conducting, or engaging in diversity, equity, and inclusion (DEI) duties as required by state or federal law. We actively incorporate these notice and compliance requirements into our bidding and procurement processes for all contractors and vendors. To enforce this, we have adopted procedures to systematically distribute physical and/or electronic copies of this prohibition policy while maintaining formal certification of our adherence to each solicitation.

24 **SB 12 Compliance - Texas Education Code Section 11.005(b) & (c)**

By acknowledging in this attribute, you understand and will comply with the requirements set forth under Texas Education Code Section 11.005(b) & (c).

List of Values

1. Compliance Acknowledgment

- **Diversity, Equity, and Inclusion (DEI) Duties Prohibition:**

I acknowledge that, in accordance with Texas Education Code Section 11.005(b), our organization will not assign diversity, equity, and inclusion duties to any person. We understand that no district employee, contractor, or volunteer is permitted to engage in such duties on behalf of the district unless required by state or federal law.

- **Prohibition of DEI Engagement:**

I acknowledge that our organization will ensure that no district employee, contractor, or volunteer engages in any diversity, equity, or inclusion duties for, at, or on behalf of the district.

2. District Employee and Contractor Policy Acknowledgment

- **Policy and Procedure Adherence:**

I confirm that our organization has reviewed the Texas Education Code Section 11.005(c) and agrees to adopt and enforce a policy and procedure to appropriately discipline any employee, contractor, or volunteer who intentionally or knowingly assigns or engages in diversity, equity, and inclusion duties. This includes potential termination if required.

- **Provision of Policy to Employees and Contractors:**

I confirm that our organization will provide both a physical and electronic copy of the district's DEI duties prohibition policy to all district employees, contractors, or volunteers.

3. Certification

I acknowledge that our organization will comply with all applicable sections of Texas Education Code Section 11.005(b) & (c) regarding the prohibition of diversity, equity, and inclusion duties.

2. **Human Resources:** To ensure compliance with Texas Education Code Section 11.005(b) & (c) under SB 12, our organization prohibits all district employees from assigning, conducting, or engaging in diversity, equity, and inclusion (DEI) duties, except as required by state or federal law. We have actively incorporated these policy requirements into our Employee Handbook on page 34 under the "Prohibition on Diversity, Equity, and Inclusion" section. To enforce this, we updated our standards of conduct and policy procedures (including Policies DF and DH) to state clearly that any employee who intentionally or knowingly engages in or assigns DEI duties will be subject to appropriate disciplinary action, up to and including termination of employment.

Entering Campus or District Offices.....	33
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Dismissal of Non-Contract Employees	33
Discharge of Convicted Employees.....	34
Prohibition on Diversity, Equity, and Inclusion	34
Prohibited Classroom Instruction.....	34

Standard 1.11 The educator shall not intentionally, knowingly, or recklessly misrepresent his or her employment history, criminal history, and/or disciplinary record when applying for subsequent employment.

Standard 1.12 The educator shall refrain from the illegal use, abuse or distribution of controlled substances, prescription drugs and toxic inhalants.

Standard 1.13 The educator shall not be under the influence of alcohol or consume alcoholic beverages on school property or during school activities when students are present.

Standard 1.14 The educator shall comply with the prohibitions on diversity, equity, and inclusion duties in Texas Education Code (TEC), §11.005.

Standard 1.15 The educator shall comply with the prohibitions on assistance with social transitioning in TEC, §11.401.

Standard 1.16 The educator shall comply with the restrictions on instruction regarding sexual orientation and gender identity in TEC, §28.0043.

Standard 1.17 The educator shall comply with the requirements to provide full information to a parent concerning a student in TEC, §26.008.

Standard 1.18 The educator shall not promote, advocate, or encourage, in a manner that is reasonably accessible or visible to students, illegal conduct:

Prohibition on Diversity, Equity, and Inclusion

Policies [DF](#), [DH](#)

Except as required by state or federal law, district employees are prohibited from engaging in diversity, equity, and inclusion activities, including assigning diversity, equity, and inclusion duties to any person. Any employee who intentionally or knowingly engages in or assigns diversity, equity, and inclusion duties to another person will be subject to appropriate discipline, including termination of employment.

- Teaching and Learning:** In response to instructional content prohibitions set forth by Senate Bill 12, specifically the restriction of instruction on sexual orientation and gender identity, our Teaching and Learning team has responded in the following areas. Each area includes supporting links embedded as artifact references.

Instructional Plan Disclosure and Public Access:

- **Website Enhancement:** Updated the Teaching and Learning website to give families easy access to the Year-At-A-Glance documents for each grade level and core subject area.
- **Family Communication Expectations:** Established clear expectations for staff communication, requiring principals to link the curriculum website in newsletters, elementary teachers to include weekly instructional focus areas, and secondary teachers to provide course syllabi.
- **Resource Support:** Developed sample communication templates for educators to personalize when sharing instructional framework resources and expectations with parents.
- **Alignment & Centralization:** Ensured all instructional plans and syllabi align with district policies and required each campus to maintain a central location for plans, accessible upon request.

Content Compliance & Curriculum Review

- **Prohibition Compliance Review:** Conducted a comprehensive review of curriculum and instructional materials in response to instructional content prohibitions regarding sexual orientation and gender identity.
- **Coordinator Verification:** Utilized a tracking system to monitor and confirm that every content coordinator completed their compliance review.

Local Classroom Review & Process Framework

- **Review Pathways:** Outlined formal pathways for local classroom instructional materials reviews to address district-initiated requests, individual parent requests, and classroom petitions.
- **Governance & Escalation Guidelines:** Defined processes for handling petition verification, board reviews, appeals to the superintendent, and formal review submissions to the Education Service Center (ESC) and Texas Education Agency (TEA).

Section 4: Cost Savings

Were there any cost savings resulting from actions taken to comply with TEC, §39.008? **No**

Total cost savings: \$ 0

If yes, describe or attach a copy of the cost savings. **None**

Section 5: Board Approval

Date of Board/Governing Body Meeting: **September 21, 2026**

Meeting notice was posted on LEA website at least seven days in advance: **Yes**

Public testimony opportunity provided during meeting: **Yes**

Certification approved by majority vote: **Yes**

Section 6: Certification Statement

By signing below, the undersigned certifies that the information contained in this document is true and correct

and that the district or charter school is in compliance with the requirements of Texas Education Code §§39.008, 11.005(c), and 28.0022(h).

Superintendent Signature: _____

Date: _____

SWORN TO AND SUBSCRIBED before me on this _____ day of _____, 20____.

Notary Public, State of Texas

Resolution Regarding Senate Bill 12 and Parent Rights

WHEREAS, Senate Bill 12 from the 89th legislative session relates to parental rights in public education, including requirements and prohibitions regarding instruction; diversity, equity and inclusion duties; assistance with District student social transitioning; and student clubs;

WHEREAS, Senate Bill 12 becomes effective on September 1, 2025; and

WHEREAS, local policies relating to matters in Senate Bill 12 will be adopted as soon as practicable, but after the effective date.

NOW, THEREFORE, BE IT RESOLVED that the Board of Trustees of Belton Independent School District directs all staff and contractors to comply with the following requirements and directives:

1. All policies shall be implemented and followed;
2. Parental rights, including the right to direct the moral and religious training of the parent's child, make decisions concerning the child's education, and consent to medical, psychiatric, and psychological treatment of the parent's child will not be infringed unless required by law or to provide life-saving care to the child;
3. Except as required by state or federal law, employees and contractors may not assign diversity, equity, and inclusion duties to any person, and the District hereby prohibits a District employee, contractor, or volunteer from engaging in diversity, equity, and inclusion duties at, for, or on behalf of the District;
4. An employee or contractor who intentionally or knowingly engages in or assigns to another person diversity, equity, and inclusion duties or engages in prohibited instruction will be appropriately disciplined, up to and including termination;
5. Employees of the District are prohibited from assisting a student enrolled in the District with social transitioning, including providing any information about social transitioning or providing guidelines intended to assist a person with social transitioning;
6. No information about a parent's child may be withheld from the parent unless required by law, and parents are entitled to access all written records of the District concerning the parent's child, including library records and health records. Information may be withheld if disclosure is likely to result in the student suffering abuse or neglect;
7. Information regarding a parent's right to access records relating to the parent's child shall be posted on the District's home page of the internet website;
8. Instructional plans or course syllabi for each class offered in the District for a semester must be posted on the District's internet website at the beginning of each semester;
9. The Superintendent is directed to provide for an internet portal through which parents of students enrolled in the District may submit comments to campus or District administrators and the Board;
10. The Board shall prioritize public comments by hearing comments at the beginning of each Board meeting;
11. The Board will only hold Board meetings outside of typical work hours;

12. Parents are entitled to notice no later than one school business day after the date an employee first suspects that a criminal offense has been committed against the parent's child;
13. Employees are not prohibited from providing parents with information regarding a student's mental, emotional, or physical health or well-being or a change in services provided to or monitoring of the student related to the student's mental, emotional, or physical health or well-being;
14. No employee will encourage or have the effect of encouraging a student to withhold from the student's parent information about the student's mental, emotional, or physical health or well-being;
15. Employees may not discourage or prohibit parental knowledge of or involvement in critical decisions affecting a student's mental, emotional, or physical health or well-being;
16. Unless authorized by law, no employee may disclose a child's health or medical information to any person other than the child's parent;
17. Unless authorized by law, no employee may collect, use, store, or disclose to any person other than the child's parent a child's biometric identifiers;
18. Unless authorized by law, no employee will provide health care services or medication or conduct a medical procedure to a student;
19. All grievances received by the District on or after September 1, 2025, will comply with the legal requirements in Texas Education Code Chapter 26A;
20. Before a student may be provided with human sexuality instruction, the District must obtain the written consent of the student's parent in the manner prescribed by law;
21. No employee may provide or allow a third party to provide instruction, guidance, activities, or programming regarding sexual orientation or gender identity to students enrolled in prekindergarten through grade 12;
22. Each parent will be provided at least two opportunities for in-person conferences with the child's teacher during each school year;
23. No student club authorized or sponsored by the District may be based on sexual orientation or gender identity;
24. Written parental consent is required before a student may participate in a student club authorized or sponsored by the District or campus;
25. The Superintendent is directed to provide a copy of this resolution to all District employees and contractors electronically and physically.

Adopted this 15 (date) day of September (month), 2025 (year), by the Board.

Board President's signature: _____

Board Secretary's signature: _____



Al-Ahmadi, Rebecca <becca.alahmadi@bisd.net>

Partnering with Families

1 message

Communications, Belton ISD <communications@bisd.net>
Bcc: allbisdstaff@bisd.net

Fri, Sep 26, 2025 at 11:43 AM

Staff-

One of our district's deepest beliefs is that strong partnerships with families are essential to maximizing a student's learning experience. A parent or guardian's insights and support are truly invaluable in helping their child thrive, both academically and personally.

This core commitment to involving our parents was recently highlighted and strengthened by the [SB 12 Resolution](#) adopted by the Board of Trustees. It serves as a reminder of our shared responsibility to offer families meaningful ways to join their child's educational journey.

Thank you for your tireless commitment to our students, their families, and the broader BISD community.

--

Belton ISD Communications
254-215-2067



DATE: September 3, 2026
TO: All Employees, District Contractors, Independent Service Providers, and Vendors
FROM: Malinda Golden, Superintendent
SUBJECT: Notification of District Policies and Procedures Related to SB12

As part of Belton ISD's implementation of Senate Bill 12 and in accordance with Texas Education Code §11.005(c) and §28.0022(h), I am providing required notice of updated school board policies and procedures related to prohibited Diversity, Equity, and Inclusion (DEI) duties and prohibited classroom instruction and activities. Statutory requirements include notifying all employees and contractors of responsibilities, expectations, prohibited activities, and applicable employment consequences and procedures.

Relevant policies include:

[BJA\(LEGAL\)](#) - Superintendent: Qualifications and Duties
[BJCF\(LOCAL\)](#) - Superintendent: Nonrenewal
[BT\(LEGAL\)](#) - Prohibition on Diversity, Equity, and Inclusion Activities
[CJ\(LEGAL\)](#) and [CJ\(LOCAL\)](#) - Contracted Services
[CMD\(LEGAL\)](#) - Equipment and Supplies Management: Instructional Materials Care and Accounting
[DF\(LEGAL\)](#) - Termination of Employment
[DG\(LEGAL\)](#) - Employee Rights and Privileges
[DH\(LOCAL\)](#) - Employee Standards of Conduct
[EMB\(LEGAL\)](#) - Miscellaneous Instructional Policies: Teaching About Controversial Issues

All employees, contractors, vendors, and service providers are expected to review and comply with all applicable school board policies and procedures. You can also access these policies online at [Belton ISD Board Policy Online](#). The District provides physical copies of these policies and procedures to each employee and contractor at the central administration office front desk.

If you have questions about these requirements or how they apply to your role, please reach out to michael.morgan@bisd.net or me.

Sincerely,

Dr. Malinda Golden

Malinda Golden, Ph.D.
Superintendent of Schools
Belton Independent School District



DATE: September 9, 2026

TO: All Employees, District Contractors, Independent Service Providers, and Vendors

SUBJECT: Notification of District Policies and Procedures Related to SB12

121 Towing & Recovery
8515 W FM 93
Belton, TX 76513

As part of Belton ISD's implementation of Senate Bill 12 and in accordance with Texas Education Code §11.005(c) and §28.0022(h), I am providing required notice of updated school board policies and procedures related to prohibited Diversity, Equity, and Inclusion (DEI) duties and prohibited classroom instruction and activities. Statutory requirements include notifying all employees and contractors of responsibilities, expectations, prohibited activities, and applicable employment consequences and procedures.

Relevant policies include:

[BJA\(LEGAL\)](#) - Superintendent: Qualifications and Duties

[BJCF\(LOCAL\)](#) - Superintendent: Nonrenewal

[BT\(LEGAL\)](#) - Prohibition on Diversity, Equity, and Inclusion Activities

[CJ\(LEGAL\)](#) and [CJ\(LOCAL\)](#) - Contracted Services

[CMD\(LEGAL\)](#) - Equipment and Supplies Management: Instructional Materials Care and Accounting

[DF\(LEGAL\)](#) - Termination of Employment

[DG\(LEGAL\)](#) - Employee Rights and Privileges

[DH\(LOCAL\)](#) - Employee Standards of Conduct

[EMB\(LEGAL\)](#) - Miscellaneous Instructional Policies: Teaching About Controversial Issues

All employees, contractors, vendors, and service providers are expected to review and comply with all applicable school board policies and procedures. You can also access these policies online at [Belton ISD Board Policy Online](#). The District provides physical copies of these policies and procedures to each employee and contractor at the central administration office front desk.

If you have questions about these requirements or how they apply to your role, please reach out to michael.morgan@bisd.net or me.

Sincerely,

A handwritten signature in black ink that reads "Dr. Malinda Golden". The signature is written in a cursive, flowing style.

Malinda Golden, Ph.D.
Superintendent of Schools
Belton Independent School District

SUPERINTENDENT
QUALIFICATIONS AND DUTIES

BJA
(LEGAL)

Qualifications

A person may not be employed as a superintendent unless the person holds an appropriate certificate or permit.

The commissioner may waive the requirement for certification of a superintendent if requested by a district as provided by Education Code 7.056 [see BF]. The commissioner may limit the waiver of certification in any manner the commissioner determines is appropriate.

A person who is not certified as a superintendent may not be employed by a district as the superintendent before the person has received a waiver of certification from the commissioner. A person may be designated to act as a temporary or interim superintendent for a district, but the district may not employ the person under a contract as superintendent unless the person has been certified or a waiver has been granted.

Education Code 21.003

Duties

A superintendent is the educational leader and chief executive officer of a district. *Education Code 11.201(a)*

The duties of a superintendent include:

1. Assuming administrative responsibility and leadership for the planning, organization, operation, supervision, and evaluation of the education programs, services, and facilities of a district and for the annual performance appraisal of the district's staff.
2. Except as provided by Education Code 11.202 (duties of principal) [see DK and DPA], assuming administrative authority and responsibility for the assignment, supervision, and evaluation of all personnel of a district other than the superintendent.
3. Overseeing compliance with the standards for school facilities. [See CS]
4. Initiating the termination or suspension of an employee or the nonrenewal of an employee's term contract. [See DF series]
5. Managing the day-to-day operations of a district as its administrative manager, including implementing and monitoring plans, procedures, programs, and systems to achieve clearly defined and desired results in major areas of district operations.
6. Preparing and submitting to a board a proposed budget and administering the budget.

SUPERINTENDENT
QUALIFICATIONS AND DUTIES

BJA
(LEGAL)

7. Preparing recommendations for policies to be adopted by a board and overseeing the implementation of adopted policies.
8. Developing or causing to be developed appropriate administrative regulations to implement policies established by a board.
9. Providing leadership for the attainment and, if necessary, improvement of student performance in a district based on the state's student achievement and quality of learning indicators and other indicators as may be adopted by the commissioner or the board. [See AIA]
10. Organizing a district's central administration.
11. Consulting with the district-level committee. [See BQA]
12. Ensuring:
 - a. Adoption of a Student Code of Conduct [see FO] and enforcement of that Code of Conduct; and
 - b. Adoption and enforcement of other student disciplinary rules and procedures as necessary.
13. Submitting reports as required by state or federal law, rule, or regulation, and ensuring that a copy of any report required by federal law, rule, or regulation is also delivered to the Texas Education Agency (TEA).
14. Providing joint leadership with a board to ensure that the responsibilities of the board and superintendent team are carried out; and
15. Performing any other duties assigned by action of a board.

Education Code 11.201(d)

In addition, a superintendent shall, on a day-to-day basis, ensure the implementation of the policies created by the board. *Education Code 11.1512(a)*

**Collaboration with
the Board**

A board and a superintendent shall work together to:

1. Advocate for the high achievement of all district students;
2. Create and support connections with community organizations to provide community-wide support for the high achievement of all district students;
3. Provide educational leadership for a district, including leadership in developing the district vision statement and long-range educational plan [see AE];

SUPERINTENDENT
QUALIFICATIONS AND DUTIES

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4. Establish district-wide policies and annual goals that are tied directly to the district's vision statement and long-range educational plan;
5. Support the professional development of principals, teachers, and other staff; and
6. Periodically evaluate board and superintendent leadership, governance, and teamwork.

Education Code 11.1512(b)

**Prohibited
Interference**

A superintendent may not interfere with an appearance or testimony of specified district personnel required by the board. *Education Code 11.1511(d)* [See BAA]

**Certification of
Compliance With
Certain Laws**

Do Not Hire
Registry

Each year, the superintendent shall certify to the commissioner that the district has complied with the requirements of Education Code 22A.151 (registry of persons not eligible for employment in or provision of services to educational entities). *Education Code 22A.151(g)*

Diversity, Equity,
and Inclusion and
Instructional
Prohibitions

Not later than September 30 each year, the superintendent shall certify to TEA that the district is in compliance with Education Code 39.008, 11.005, and 28.0022. *Education Code 39.008(a)* [See BT(LEGAL) for provisions related to certification requirements.]

**Testimony Before
SBOE**

If the commissioner finds against a school district under Education Code 7.057 in at least five grievances to which that section applies involving the district during the school year, the superintendent must appear before the SBOE to testify regarding the commissioner's findings and the frequency of grievances against the district. *Education Code 26A.004*

SUPERINTENDENT
NONRENEWAL

BJCF
(LOCAL)

Reasons

The Board's decision not to renew the Superintendent's contract shall not be based on the Superintendent's exercise of Constitutional rights or based unlawfully on race, color, religion, sex, gender, national origin, age, disability, or any other basis prohibited by law. Reasons for the nonrenewal of the Superintendent's contract shall be:

1. Deficiencies pointed out in evaluations, supplemental memoranda, or other communications.
2. Failure to fulfill duties or responsibilities.
3. Incompetency or inefficiency in the performance of duties.
4. Insubordination or failure to comply with Board directives.
5. Failure to comply with Board policies or administrative regulations.
6. Failure of the District to make measurable progress toward the goals stated in the District improvement plan. [See BQ]
7. Conducting personal business during school hours when it results in neglect of duties.
8. Drunkenness or excessive use of alcoholic beverages; or possession, use, or being under the influence of alcohol or alcoholic beverages while on District property, while working in the scope of the employee's duties, or while attending any school- or District-sponsored activity.
9. The illegal possession, use, manufacture, or distribution of a controlled substance, a drug, a dangerous drug, hallucinogens, or other substances regulated by state statutes.
10. Failure to meet the District's standards of professional conduct.
11. Failure to report to the Board any arrest, indictment, conviction, no contest or guilty plea, or other adjudication for any felony, any crime involving moral turpitude, or other offense listed at DH(LOCAL). [See DH]
12. Conviction of or deferred adjudication for any felony, any crime involving moral turpitude, or other offense listed at DH(LOCAL); or conviction of a lesser included offense pursuant to a plea when the original charged offense is a felony. [See DH]
13. Failure to comply with reasonable District requirements regarding advanced coursework or professional improvement and growth.

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NONRENEWAL

BJCF
(LOCAL)

14. Disability, not otherwise protected by law, that prevents the Superintendent from performing the essential functions of the job, with or without reasonable accommodation.
15. Any activity, school-connected or otherwise, that, because of publicity given it or knowledge of it among students, faculty, or the community, impairs or diminishes the Superintendent's effectiveness in the District.
16. Any breach by the Superintendent of an employment contract or any reason specified in the Superintendent's employment contract.
17. Failure to maintain an effective working relationship, or maintain good rapport, with parents, the community, staff, or the Board.
18. Behavior that presents a danger of physical harm to a student or other individuals.
19. Assault on a person on District property or at a school-related function, or on an employee, student, or student's parent regardless of time or place.
20. Use of profanity in the course of performing any duties of employment, whether on or off District premises, in the presence of students, staff, or members of the public, if reasonably characterized as unprofessional.
21. Falsification of records or other documents related to the District's activities.
22. Falsification or omission of required information on an employment application.
23. Misrepresentation of facts to the Board or other District officials in the conduct of District business.
24. Failure to fulfill or maintain requirements for Superintendent certification, unless granted a waiver by the commissioner of education.
25. Any attempt to encourage or coerce a child to withhold information from the child's parent or from other District personnel.
26. Any reason that makes the employment relationship void or voidable, such as a violation of federal, state, or local law.
27. Engaging in or assigning to another individual, whether intentionally or knowingly, an instruction, guidance, activities, or programming prohibited by law. [See EMB]

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NONRENEWAL

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(LOCAL)

28. Engaging in or assigning to another individual, whether intentionally or knowingly, diversity, equity, and inclusion duties prohibited by law.
29. Any reason constituting good cause for terminating the contract during its term.

**Notice of Proposed
Nonrenewal**

If the Board determines that the Superintendent's contract should be considered for nonrenewal, the Board shall deliver to the Superintendent written notice of the proposed nonrenewal in accordance with law.

Request for Hearing

If the Superintendent desires a hearing after receiving notice of the proposed nonrenewal, the Superintendent shall notify the Board in writing not later than the 15th day after receiving the notice. When the Board receives a timely request for a hearing on proposed nonrenewal, the hearing shall be held not later than the 15th day after receipt of the request, unless the parties mutually agree to a delay. The Superintendent shall be given notice of the hearing date as soon as it is set.

Hearing Procedure

Unless the Superintendent requests that the hearing be open, the hearing shall be conducted in closed meeting with only the members of the Board, the Superintendent, their chosen representatives, and such witnesses as may be called in attendance. Witnesses may be excluded from the hearing until called to present evidence. The Superintendent and the Board may each be represented by a person designated in writing to act for them. Notice, at least five days in advance of the hearing, shall be given by each party intending to be represented, including the name of the representative. Failure to give such notice may result in postponement of the hearing.

The conduct of the hearing shall be under the presiding officer's control and shall generally follow the steps listed below:

1. After consultation with the parties, the presiding officer shall impose reasonable time limits for presentation of evidence and closing arguments.
2. The hearing shall begin with the Board's presentation, supported by such proof as it desires to offer.
3. The Superintendent may cross-examine any witnesses for the Board.
4. The Superintendent may then present such testimonial or documentary proofs, as desired, to offer in rebuttal or in general support of the contention that the contract be renewed.

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NONRENEWAL**

**BJCF
(LOCAL)**

5. The Board may cross-examine any witnesses for the Superintendent and offer rebuttal to the testimony of the Superintendent's witnesses.
6. Closing arguments may be made by each party.

A record of the hearing shall be made so that a certified transcript can be prepared, if required.

Board Decision

The Board may consider only such evidence as is presented at the hearing. After all the evidence has been presented, if the Board determines that the reasons given in support of the recommendation to not renew the Superintendent's contract are lawful, supported by the evidence, and not arbitrary or capricious, it shall so notify the Superintendent by a written notice not later than the 15th day after the date on which the hearing is concluded. This notice shall also include the Board's decision on renewal, which decision shall be final.

No Hearing

If the Superintendent fails to request a hearing, the Board shall take the appropriate action and notify the Superintendent in writing of that action not later than the 30th day after the date the notice of proposed nonrenewal was sent.

PROHIBITION ON DIVERSITY, EQUITY, AND INCLUSION ACTIVITIES

BT
(LEGAL)

Definitions

“Diversity, equity, and inclusion duties” means:

1. Influencing hiring or employment practices with respect to race, sex, color, or ethnicity except as necessary to comply with state or federal antidiscrimination laws;
2. Promoting differential treatment of or providing special benefits to individuals on the basis of race, color, or ethnicity;
3. Developing or implementing policies, procedures, trainings, activities, or programs that reference race, color, ethnicity, gender identity, or sexual orientation, except for the purpose of student recruitment efforts by colleges and universities designated as historically black colleges and universities in collaboration with school districts, or as necessary to comply with state or federal law;
4. Compelling, requiring, inducing, or soliciting any person to provide a diversity, equity, and inclusion statement or giving preferential consideration to any person based on the provision of a diversity, equity, and inclusion statement.

Education Code 11.005(a)

Prohibited Activities

Except as required by state or federal law, a district may not assign diversity, equity, and inclusion duties to any person and must prohibit a district employee, contractor, or volunteer from engaging in diversity, equity, and inclusion duties at, for, or on behalf of the district.

Discipline Policy

The district shall adopt a policy and procedure for the appropriate discipline, including termination, of a district employee or contractor who intentionally or knowingly engages in or assigns to another person diversity, equity, and inclusion duties. The policy and procedure adopted by the district must ensure that an employee or contractor receives adequate due process and an opportunity to appeal disciplinary actions, including termination, in the same manner provided for other disciplinary actions.

Notice

The district shall provide a physical and electronic copy of the policy and procedure to each district employee or contractor.

Education Code 11.005(b)-(d)

Activities Not Prohibited

Nothing in this policy may be construed to:

1. Limit or prohibit a district from contracting with historically underutilized businesses or businesses owned by members of a minority group or by women in accordance with applicable state law;

PROHIBITION ON DIVERSITY, EQUITY, AND INCLUSION ACTIVITIES

BT
(LEGAL)

2. Limit or prohibit a district from acknowledging or teaching the significance of state and federal holidays or commemorative months and how those holidays or months fit into the themes of history and the stories of this state and the United States of America in accordance with the TEKS adopted under Education Code, Subchapter A, Chapter 28;
3. Affect a student's rights under the First Amendment to the U.S. Constitution or Section 8, Article I, Texas Constitution;
4. Limit or prohibit a school district from analyzing school-based causes and taking steps to eliminate unlawful discriminatory practices as necessary to address achievement gaps and differentials described by Education Code 39.053; or
5. Apply to:
 - a. Classroom instruction that is consistent with the TEKS adopted by the State Board of Education;
 - b. The collection, monitoring, or reporting of data;
 - c. A policy, practice, procedure, program, or activity intended to enhance student academic achievement or postgraduate outcomes that is designed and implemented without regard to race, sex, color, or ethnicity; or
 - d. A student club that is in compliance with the requirements of Education Code 33.0815.

Education Code 11.005(e)

**Certification
Required**

Not later than September 30 of each year, the superintendent of a school district shall certify to the Texas Education Agency (TEA) that the district is in compliance with Education Code 11.005 (prohibition on diversity, equity, and inclusion duties) and the instructional requirements and prohibitions under Education Code 28.0022 [see EMB]. The certification shall be submitted electronically. TEA shall post each certification received under Education Code 39.008(a) on TEA's website.

Requirements

The certification must include:

1. A description of the policies and procedures required by Education Code 11.005(c) and 28.0022(h) and the manner in which district employees and contractors were notified of those policies and procedures;
2. Any existing policies, programs, procedures, or trainings that were altered to ensure compliance with Education Code 39.008, 11.005, or 28.0022; and

PROHIBITION ON DIVERSITY, EQUITY, AND INCLUSION ACTIVITIES

BT
(LEGAL)

3. Any cost savings resulting from actions taken by the school district to comply with this section.

Board Approval

The certification required by Education Code 39.008(a) must be approved by a majority vote of the board at a public meeting that includes an opportunity for public testimony and for which notice was posted on the district's website at least seven days before the date on which the meeting is held.

Education Code 39.008

CONTRACTED SERVICES

CJ
(LEGAL)

**Employment
Assistance
Prohibited**

A district that receives Title I funds shall have regulations or policies that prohibit any individual who is a school employee, contractor, or agent, or a district, from assisting a school contractor or agent in obtaining a new job, apart from the routine transmission of administrative and personnel files, if the individual or district knows, or has probable cause to believe, that such contractor or agent engaged in sexual misconduct regarding a minor or student in violation of the law.

This requirement shall not apply if the information giving rise to probable cause has been properly reported to a law enforcement agency with jurisdiction over the alleged misconduct; and has been properly reported to any other authorities as required by federal, state, or local law, including Title IX of the Education Amendments of 1972 (20 U.S.C. 1681 et seq.) and the implementing regulations under Part 106 of Title 34, Code of Federal Regulations, or any succeeding regulations; and:

1. The matter has been officially closed or the prosecutor or police with jurisdiction over the alleged misconduct has investigated the allegations and notified school officials that there is insufficient information to establish probable cause that the contractor or agent engaged in sexual misconduct regarding a minor or student in violation of the law;
2. The contractor or agent has been charged with and acquitted or otherwise exonerated of the alleged misconduct; or
3. The case or investigation remains open and there have been no charges filed against, or indictment of, the contractor or agent within four years of the date on which the information was reported to a law enforcement agency.

20 U.S.C. 7926 [See also DC]

Severance Pay

A district that enters into a contract or employment agreement, or renewal or renegotiation of an existing contract or employment agreement, that contains a provision for severance pay with an independent contractor must include:

1. A requirement that severance pay that is paid from public money may not exceed the amount of compensation, at the rate at the termination of the contract, the independent contractor would have been paid for 20 weeks, excluding paid time off or accrued vacation leave; and
2. A prohibition of the provision of severance pay when the independent contractor is terminated for misconduct.

CONTRACTED SERVICES

CJ
(LEGAL)

A district shall post each severance agreement in a prominent place on its internet website.

“Misconduct” means an act or omission by a contractor in the performance of the contractor’s duties that the board determines to be misconduct, including any finding of criminal conduct.

“Severance pay” means dismissal or separation income paid on termination of the contract of an independent contractor that is in addition to the contractor’s usual compensation as prescribed by the contract.

[For provisions related to severance agreements for district employees, see DEA.]

Local Gov’t Code 180.011

**Prohibition on
Diversity, Equity,
and Inclusion**

A district shall adopt a policy and procedure for the appropriate discipline, including termination, of a district contractor who intentionally or knowingly engages in or assigns to another person diversity, equity, and inclusion duties. The district shall provide a physical and electronic copy of the policy and procedure to each district contractor.

The policy and procedure adopted by a district must ensure that a contractor receives adequate due process and an opportunity to appeal disciplinary actions, including termination, in the same manner provided for other disciplinary actions. [See BT]

Education Code 11.005(c)-(d) [See also DF]

**Prohibited
Classroom
Instruction**

A district shall adopt a policy and procedure for the appropriate discipline, including termination, of a district or school contractor who intentionally or knowingly engages in or assigns to another person an act prohibited by Education Code 28.0022 (Certain Instructional Requirements and Prohibitions). The district shall provide a physical and electronic copy of the policy and procedure to each district or school contractor. *Education Code 28.0022(h)* [See also DF, EMD]

**Sexual Orientation
and Gender Identity**

A district or district employee may not allow a third party to provide instruction, guidance, activities, or programming regarding sexual orientation and gender identity to students enrolled in prekindergarten through 12th grade.

This provision may not be construed to:

1. Limit a student’s ability to engage in speech or expressive conduct protected by the First Amendment, U.S. Constitution or by Section 8, Article I, Texas Constitution, that does not result in material disruption to school activities;

CONTRACTED SERVICES

CJ
(LEGAL)

2. Limit the ability of a person who is authorized by the district to provide physical or mental health-related services to provide the services to a student, subject to any required parental consent; or
3. Prohibit an organization whose membership is restricted to one sex and whose mission does not advance a political or social agenda from meeting on a district campus.

Education Code 28.0043 [See also EMB]

CONTRACTED SERVICES

CJ
(LOCAL)

**Employment
Assistance
Prohibited**

No District employee shall assist a contractor or agent of the District or of any other school district in obtaining a new job if the employee knows, or has probable cause to believe, that the contractor or agent engaged in sexual misconduct regarding a minor or student in violation of the law. Routine transmission of an administrative file does not violate this prohibition.

No District contractor or agent shall assist an employee, contractor, or agent of the District or of any other school district in obtaining a new job if the contractor or agent knows, or has probable cause to believe, that the individual engaged in sexual misconduct regarding a minor or student in violation of the law. Routine transmission of an administrative or personnel file does not violate this prohibition.

[See also DC for prohibitions relating to employees.]

**Prohibited
Classroom
Instruction or
Activities**

A District contractor is prohibited from intentionally or knowingly engaging in or assigning to another individual instruction, guidance, activities, or programming prohibited by law [see EMB(LEGAL)]. Violation of this policy shall result in termination of the contract. A District contractor shall be permitted to appeal this action in accordance with GF(LOCAL).

**Prohibition on
Diversity, Equity,
and Inclusion**

A contract is subject to termination if the District contractor intentionally or knowingly:

- Engages in diversity, equity, and inclusion (DEI) duties.
- Assigns to another individual DEI duties.

A District contractor shall be permitted to appeal this action in accordance with GF(LOCAL).

[See BT(LEGAL)]

EQUIPMENT AND SUPPLIES MANAGEMENT
INSTRUCTIONAL MATERIALS CARE AND ACCOUNTING

CMD
(LEGAL)

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INSTRUCTIONAL MATERIALS CARE AND ACCOUNTING

CMD
(LEGAL)

Note: For provisions regarding selection and adoption of instructional materials, see EFA.

**Instructional
Materials and
Technology
Furnished Without
Cost to Students**

Instructional materials selected for use in the public schools shall be furnished without cost to the students attending those schools. Except as provided by Education Code 31.104(d), a district may not charge a student for instructional material or technological equipment purchased by the district with the district's technology and instructional materials allotment. *Education Code 31.001*

Each instructional material, including electronic instructional material only to the extent of any applicable licensing agreement, purchased as provided by Education Code Chapter 31 for a district is the property of the district. *Education Code 31.102(a)-(b)*

**Instructional
Materials and
Technology
Allotment**

A district is entitled to an allotment each biennium from the state instructional materials and technology fund for each student enrolled in the district on a date during the last year of the preceding biennium specified by the commissioner of education. The commissioner shall determine the amount of the allotment per student each biennium on the basis of the amount of money available in the state instructional materials and technology fund to fund the allotment. The allotment shall be transferred from the state instructional materials and technology fund to the credit of the district's instructional materials and technology account as provided by Education Code 31.0212. *Education Code 31.0211(a)*

The commissioner shall, as early as practicable during each biennium, notify each district of the estimated amount to which the district will be entitled during the next fiscal biennium. *Education Code 31.0215(a)*

The commissioner shall determine the amount of the Instructional Materials and Technology Allotment for a district based on PEIMS student enrollment data from the fall snapshot collection of the school year preceding the first year of each biennium.

The amount of the allotment determined by the commissioner is final and may not be appealed.

19 TAC 67.1001(a), (d)

**Allotment
Adjustment
*Change in
Enrollment***

Not later than May 31 of each school year, a district may request that the commissioner adjust the number of students for which the district is entitled to receive an allotment on the grounds that the number of students attending school in the district will increase or decrease during the school year for which the allotment is provided. The commissioner may also adjust the number of students

EQUIPMENT AND SUPPLIES MANAGEMENT
INSTRUCTIONAL MATERIALS CARE AND ACCOUNTING

CMD
(LEGAL)

for which a district is entitled to receive an allotment, without a request by the district, if the commissioner determines a different number of students is a more accurate reflection of students who will be attending school in the district. The commissioner's determination is final. *Education Code 31.0211(e)*

*High Enrollment
Growth*

Each year the commissioner shall adjust the instructional materials and technology allotment of districts experiencing high enrollment growth. *Education Code 31.0214(a)*

Permitted
Expenditures

The allotment funds may be used to purchase or pay for:

1. Instructional materials, regardless of whether the instructional materials are on the list of approved instructional materials maintained by the State Board of Education (SBOE) under Education Code 31.022;
2. Consumable instructional materials;
3. Instructional materials for use in bilingual education classes, as provided by Education Code 31.029;
4. Instructional materials for use in college preparatory courses under Education Code 28.014, as provided by Education Code 31.031;
5. Supplemental instructional materials;
6. OER instructional materials, as provided by Education Code Chapter 31, Subchapter B-1;
7. Instructional materials and technological equipment under any continuing contracts of the district in effect on September 1, 2011;
8. Technological equipment necessary to support the use of any instructional materials purchased with an allotment under this provision;
9. Inventory software or systems for storing, managing, and accessing instructional materials and analyzing the usage and effectiveness of instructional materials;
10. Services, equipment, and technology infrastructure necessary to ensure internet connectivity and adequate bandwidth;
11. Training educational personnel directly involved in student learning in the appropriate use of instructional materials and for providing for access to technological equipment for instructional use;

EQUIPMENT AND SUPPLIES MANAGEMENT
INSTRUCTIONAL MATERIALS CARE AND ACCOUNTING

CMD
(LEGAL)

12. Training personnel in the electronic administration of assessment instruments;
13. The salary and other expenses of an employee who provides technical support for the use of technological equipment directly involved in student learning;
14. Costs associated with distance learning, including services, equipment, and technology such as Wi-Fi, internet access hotspots, wireless network service, broadband service, and other services and technological equipment necessary to facilitate internet access;
15. Costs associated with providing parental access to the district's library materials catalog and the ability to submit a list of library materials that the parent's child is not allowed to access as required by Education Code 33.023. [See EFB]
16. Formats of instructional materials that are fully accessible to students with disabilities;
17. Activities related to the local review and adoption of instructional materials;
18. Software for analyzing the use and effectiveness of instructional materials;
19. Software for analyzing the appropriateness of instructional materials necessary for the teaching of, instruction in, or demonstration of knowledge of the essential knowledge and skills adopted under Education Code 28.002; and
20. Costs associated with complying with Education Code 33.023, relating to parental access to library catalog and access by the parent's child to certain library materials.

Education Code 31.0211(c), 33.023(d); 19 TAC 67.1001(e)

Prohibited
Expenditures

The allotment funds may not be used to purchase instructional material that:

1. Contains obscene or harmful content or would otherwise cause the district to which the funds were allotted to be unable to submit the certification required under Education Code 31.1011(a)(1)(B) [see Certification of Instructional Materials, below]; or
2. Is on the list of rejected instructional materials maintained by the SBOE.

Education Code 31.0211(f)

EQUIPMENT AND SUPPLIES MANAGEMENT
INSTRUCTIONAL MATERIALS CARE AND ACCOUNTING

CMD
(LEGAL)

Allotment funds may not be used to pay for:

1. Services for installation;
2. The physical conduit that transmits data, such as cabling and wiring, or electricity;
3. Office and school supplies;
4. Items that are not directly related to student instruction, such as furniture, athletic equipment, extension cords, temporary contractors, or video surveillance equipment;
5. Travel expenses;
6. Equipment used for moving or storing instructional materials;
7. Instructional material that contains obscene or harmful content or would otherwise cause the district to be unable to submit the certification required under Education Code 31.11011(a)(1)(B); or
8. Instructional material that incorporates three-cueing in the phonics curriculum required under Education Code, Chapter 28.

19 TAC 67.1001(f)

A district may not adopt or otherwise use instructional material included on the list of rejected instructional materials maintained by the SBOE. *Education Code 31.024*

Technological
Equipment

In purchasing technological equipment, a district shall:

1. Secure technological solutions that meet the varying and unique needs of students and teachers in the district; and
2. Consider both the long-term cost of ownership of the technological equipment and flexibility for innovation.

Education Code 31.0211(d)

**Instructional
Materials and
Technology Account**

The commissioner shall maintain an instructional materials and technology account for each district. In the first year of each biennium, the commissioner shall deposit the district's allotment in the account. The commissioner shall pay the cost of instructional materials requisitioned by a district under Education Code 31.103 using funds from the district's instructional materials and technology account.

Money deposited in a district's instructional materials and technology account during each state fiscal biennium remains in the account and available for use by the district for the entire biennium.

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At the end of each biennium, a district with unused money in the district's account may carry forward any remaining balance to the next biennium.

A district shall provide to TEA the title and publication information for any instructional materials requisitioned or purchased by the district with the district's instructional materials and technology allotment.

Education Code 31.0212(a)-(d)

Availability of
Allotment Funds

The allotment for each biennium will be made available for district use through EMAT as early as possible in the fiscal year preceding the beginning of the biennium for which the funds have been appropriated.

A district may access its allotment funds for an upcoming school year after submitting to the commissioner:

1. Certification that the school district or open-enrollment charter school has instructional materials that cover all the required TEKS, except those for physical education, as required by Education Code 31.1011;
2. Certification that the school district or open-enrollment charter school has used its allotment for only allowable expenditures; and
3. Information regarding the instructional materials used by the district during the previous school year, including the cost of each material as required by Education Code 31.1012.

Upon completion of the requirements, a district may access its allotment funds by correctly providing all the information required in the state ordering system.

Information required in the state ordering system may include verification of TEKS coverage for certain disbursement requests.

19 TAC 67.1001(g)-(j)

Additional State Aid

For State-Approved
Instructional
Materials

For each student enrolled in the district, a school district is entitled to additional state aid for each school year in an amount equal to \$40, or a greater amount provided by appropriation, to procure instructional material that has been reviewed by the Texas Education Agency (TEA); placed on the SBOE list of approved instructional materials; designated by the SBOE as being included or capable of being included in an instructional materials parent portal; and acquired from a publisher, manufacturer, or other entity that has not been found to violate Education Code 31.151. *Education Code 48.307(a)*

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A district is entitled to the amount of state aid provided by 19 Administrative Code 67.1003(a) each school year, regardless of whether the district uses the amount during the school year for which the amount was provided. *19 TAC 67.1003(i)*

For Open Education
Resource
Instructional
Materials

Subject to Education Code 31.0751 (Open Education Resource [OER] transition plan), a district is entitled to additional state aid for each school year in an amount not to exceed \$20 for each student for the costs incurred or for which the district is obligated to pay during the school year in which the aid is provided for the printing and shipping of OER instructional material made available under Education Code Chapter 31, Subchapter B-1. *Education Code 48.308(a)*

*Amount of
Additional State
Aid*

The commissioner of education shall determine the amount of the additional state aid for OER instructional materials for a district based on PEIMS student enrollment data from the fall snapshot collection of the current school year.

Before PEIMS student enrollment data from the fall snapshot collection of the current school year is available, a district will have an expected allotment amount that is based on 90 percent of the PEIMS student enrollment data from the fall snapshot collection of the previous school year.

Funds may only be used for the costs incurred or for which a district is obligated to pay during the school year in which the aid is provided.

Requisitions

Requisitions for funding must be submitted in TEA's online requisition and disbursement system (EMAT) before August 31 of the fiscal year in which the aid is provided.

The entitlements for each year will be made available for district use through EMAT as early as possible in the fiscal year for which the funds have been appropriated.

*Permissible Use
of Additional
State Aid*

The additional state aid for OER instructional materials may be used to purchase:

1. OER instructional material placed on the list of approved materials outlined in Education Code 31.022, including any non-text components of the approved product, such as manipulative kits; and
2. OER instructional material components placed on the list of approved materials outlined in Education Code 31.022, only after an initial purchase of all components of the product.

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The additional state aid for OER instructional materials may not be used to purchase or reimburse for:

1. Instructional material or material components not on the list of approved instructional materials;
2. Instructional material placed on the rejected list of instructional materials;
3. Instructional material that promotes three-cueing as defined in Education Code 28.0062(a-1); or
4. Printing of SBOE-approved OER material, which may be otherwise procured through a requisition in EMAT.

The commissioner may grant a waiver to exempt a district from an initial purchase of each component of an approved product if the district can demonstrate that it already possesses an identical or near-identical component for each student and/or teacher as indicated by the product design.

19 TAC 67.1004

Purchasing Method

A district is not required to use a method provided by Education Code 44.031(a) to purchase instructional materials that have been reviewed by TEA and included on the list of approved instructional materials maintained by the SBOE. *Education Code 31.102(d)*

Requisitions, Use, and Distribution

Delegation of Authority

The board may delegate to an employee the authority to requisition, distribute, and manage the inventory of instructional materials, consistent with Education Code Chapter 31 and rules adopted under that chapter. *Education Code 31.104(a)*

Local Funds

A district may use local funds to purchase any instructional materials in addition to those selected under Education Code Chapter 31. *Education Code 31.106*

Online Requisition Program

A district shall make a requisition for instructional materials using EMAT. A district may requisition instructional materials for grades above the grade level in which a student is enrolled. *Education Code 31.103(b)-(c)*

Distribution

The board shall distribute printed instructional materials to students in the manner that the board determines is most effective and economical. *Education Code 31.102(c)*

OER Instructional Materials

A district may adopt OER instructional material at any time. A district may only adopt or otherwise use an OER instructional material that is not included on the list of rejected instructional materials maintained by the SBOE.

OER Transition
Plan

Except as otherwise provided by the Education Code, the commissioner may not require a district to adopt or use an OER instructional material. A district may not be charged for a cost associated with the selection of an OER instructional material, except for the cost of printing copies of the material. *Education Code 31.073*

To qualify for additional state aid under Education Code 48.308, the board must adopt an OER instructional material transition plan to assist classroom teachers in the district who will be using an OER instructional material in a specific subject or grade level for which the teacher has not previously used an OER instructional material.

The plan must ensure that OER instructional materials are used in a manner that maintains the instructional flexibility of a classroom teacher to address the needs of each student.

A district that participates in the program developed and maintained by TEA under Education Code 31.0752 is not required to adopt a transition plan under this provision. [See OER Instructional Material Support Program, below]

Education Code 31.0751

The OER instructional material transition plan shall be submitted in a format determined by the commissioner.

A district is required to have a locally maintained OER transition plan that complies with 19 Administrative Code 67.1315 to access funding allotted under Education Code 48.308.

A district is required to submit an OER instructional material transition plan only when:

1. First adopting an SBOE-approved OER product for a grade level or subject/course; or
2. Expanding implementation of an SBOE-approved OER product to additional campuses and/or grade levels.

The OER instructional material transition plan adopted by the board of trustees shall include the plan of the district to ensure the following:

1. Clear communication and stakeholder change management plans and timelines;
2. Timely access to print materials and related manipulatives through OER procurement and distribution;

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3. Sufficient planning and instructional time evidenced by instructional calendars and master schedules aligned to the requirements of the materials;
4. Clear expectations for the implementation of:
 - a. Instructional materials;
 - b. Internalization and student work analysis protocols; and
 - c. Curriculum-embedded assessments;
5. Processes for stakeholder communication and public posting, as outlined in Education Code 26.006, if materials have been modified by the district;
6. The maintenance of instructional flexibility through clear guidance for acceptable teacher modifications to instructional pacing, sequencing, and lesson content to address the needs of each student; and
7. Sufficient professional learning and development for school leaders, instructional coaches, and teachers, including:
 - a. Pre-service product onboarding and orientation; and
 - b. Ongoing, job-embedded, curriculum-based professional learning, including cycles of observation and feedback.

The commissioner may request and review OER instructional material transition plans before funding is released and reject a plan subsequent to review.

19 TAC 67.1315

OER Instructional
Material Support
Program

TEA shall develop and maintain a program to assist school districts in adopting and using OER instructional material, including by assisting districts to:

1. Maintain the instructional flexibility of classroom teachers to address the needs of each student; and
2. Schedule instructional periods in a manner that allows classroom teachers sufficient time to effectively prepare and present instructional material within the teacher's normal work day.

TEA shall engage in efforts to meet the demand from districts that request assistance for the 2024-25 or 2025-26 school year. Until September 1, 2027, a school district may apply assistance received to offset the payment of costs related to implementing OER

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instructional material, regardless of whether the district incurred the cost before receiving the assistance.

Education Code 31.0752

Requisition

A district that selects OER instructional material shall requisition a sufficient number of printed copies for use by students unable to access the instructional material electronically unless the district provides to each student:

1. Electronic access to the instructional material at no cost to the student; or
2. Printed copies of the portion of the instructional material that will be used in the course.

Education Code 31.103(d)

Parent Portal

An entity that hosts an instructional materials parent portal must comply with requests regarding parental access to the portal made by a district in compliance with Education Code 31.154 or Education Code 26.006 [see EFA]. *Education Code 31.154(e)*

[For more information regarding the requirements for certain entities that supply instructional materials to host a parent portal, see Education Code 31.154.]

**Bilingual
Instructional
Materials**

A district shall purchase with its allotment or otherwise acquire instructional materials for use in bilingual education classes. *Education Code 31.029*

**Certification of
Instructional
Materials**

Prior to the beginning of each school year, a district shall submit to the SBOE and commissioner certification that the district:

1. For each subject in the required curriculum under Education Code 28.002, other than physical education, and each grade level:
 - a. Provides each student with instructional materials that cover all elements of the essential knowledge and skills adopted by the SBOE for that subject and grade level; and
 - b. In the provision of instructional materials, the district protects students from obscene or harmful content as necessary for compliance with the Children's Internet Protection Act (Pub. L. No. 106-554) [see CQ], Education Code 28.0022 [see EMB], Penal Code 43.22, and any other law or regulation that protects students from obscene or harmful content [see EFA]; and

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2. The district used money allocated to the district or school under the instructional materials and technology allotment only for purposes allowed under Education Code 31.0211.

To determine whether each student has instructional materials that cover all elements of the essential knowledge and skills, a district may consider:

1. Instructional materials adopted by the SBOE;
2. Instructional materials developed, purchased, or otherwise acquired by the district; and
3. OER instructional materials and other electronic instructional materials included in the repository under Education Code 31.0722.

Education Code 31.1011

Annual Report

Each district shall annually report to TEA information regarding the instructional materials used by the district during the previous school year, including the cost of each material. *Education Code 31.1012*

Ownership

Except as otherwise provided, a student must return all instructional materials to the teacher at the end of the school year or when the student withdraws from school. At the end of the school year for which OER instructional material that a district does not intend to use for another student is distributed, the printed copy of the OER instructional material becomes the property of the student to whom it is distributed.

This provision does not apply to an electronic copy of OER instructional material.

Education Code 31.104(c), (g)-(h)

**Responsibility for
Instructional
Materials and
Equipment**

Each student or the student's parent or guardian is responsible for all instructional material and technological equipment not returned in an acceptable condition by the student. A student who fails to return in an acceptable condition all instructional materials and technological equipment forfeits the right to free instructional materials and technological equipment until all instructional materials and technological equipment previously issued but not returned in an acceptable condition are paid for by the student, parent, or guardian.

As provided by board policy, a district may waive or reduce the payment required if the student is from a low-income family. [See FP] The district shall allow the student to use instructional materials and technological equipment at school during each school day.

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If instructional materials or technological equipment is not returned in an acceptable condition or paid for, a district may withhold the student's records. A district may not prevent the student from graduating, participating in a graduation ceremony, or receiving a diploma. [See FL and GBA regarding student and parental right to access records; and FD, FFAB, and FL regarding a district's duties to provide records to another district]

The board may not require an employee of the district who acts in good faith to pay for instructional materials or technological equipment that is stolen, misplaced, or not returned by a student. [See DG]

These provisions do not apply to an electronic copy of OER instructional material.

Education Code 31.104(d), (e), (h) [See also EFA]

Acceptable
Condition

Printed instructional materials are considered to be in acceptable condition if:

1. The cover, binding, pages, spine, and all integral components of the instructional materials are wholly intact and the instructional materials are fully usable by students; and
2. No component of the instructional materials is soiled, torn, or damaged (whether intentionally or by lack of appropriate care) to the extent that any portion of the content is too disfigured or obscured to be fully accessible to other students.

Electronic instructional materials are considered to be in acceptable condition if:

1. All components or applications that are a part of the electronic instructional materials are returned;
2. The electronic materials perform as they did when they were new;
3. The electronic instructional materials do not contain computer code (e.g., bug, virus, worm, or similar malicious software) that has been designed to self-replicate, damage, change, or otherwise hinder the performance of any computer's memory, file system, or software; and
4. The electronic instructional materials have not been installed with plug-ins, snap-ins, or add-ins without the prior approval of the district.

Technological equipment is considered to be in acceptable condition if:

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1. The equipment is returned with the software and hardware in their original condition unless the district authorized changes; and
2. The physical condition of the equipment is fully usable as it was originally intended to be used.

19 TAC 66.1310

Lost or Damaged
Instructional
Materials

A district may order replacements for instructional materials that have been lost or damaged directly from the publisher of the instructional materials or any source for a printed copy of OER instructional material. *Education Code 31.104(b)*

Sale or Disposal

The board shall determine how the district will dispose of discontinued printed instructional materials, electronic instructional materials, and technological equipment.

Sale

The board may sell printed instructional materials on the date the instructional material is discontinued for use in the public schools by the SBOE or the commissioner. The board may also sell electronic instructional materials and technological equipment owned by the district.

Use of Proceeds

Any funds received by a district from a sale must be used to purchase instructional materials and technological equipment allowed under Education Code 31.0211.

Disposal

The board may dispose of printed instructional material before the date the instructional material is discontinued for use in the public schools by the SBOE if the board determines that the instructional material is not needed by the district and the board does not reasonably expect that the instructional material will be needed. A district must notify the commissioner of any instructional material the district disposes of under this provision.

Education Code 31.105

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Note: For a detailed treatment of termination and nonrenewal of educator contracts, see policies DF AA and DF AB (Probationary Contracts), and DF BA and DF BB (Term Contracts).

Withholding Information

An attempt by any district employee to encourage or coerce a child to withhold information from the child's parent is grounds for discharge or suspension under Education Code 21.104 (probationary contracts) and 21.211 (term contracts) or by the State Board for Educator Certification (SBEC), if applicable. *Education Code 26.008(b)*

Registry of Persons Not Eligible for Employment

A district shall discharge, or refuse to hire, or terminate, a person listed on TEA's registry of persons who are not eligible to be employed. [See DBAA] *Education Code 22A.151(b)*

Discharge of Convicted Employees

A district shall discharge or refuse to hire an employee or applicant for employment if the district obtains information through a criminal history record information (CHRI) review that the employee or applicant has been:

1. Convicted of or placed on deferred adjudication community supervision for:
 - a. An offense requiring registration as a sex offender under Code of Criminal Procedure Chapter 62;
 - b. An offense under Penal Code 21.12, Improper Relationship Between an Educator and a Student, or Penal Code 43.24, Sale, Distribution, or Display of Harmful Material to a Minor;
 - c. A felony offense under Penal Code Chapter 43, Public Indecency;
 - d. A felony offense involving school property; or
 - e. An offense under the laws of another state or federal law that is equivalent to items a, b, c, or d; or
2. Convicted of:
 - a. A felony under Title 5, Penal Code; or
 - b. An offense under the laws of another state or federal law that is equivalent to an offense under item 2a, above.

Exception

However, a district is not required to discharge an employee if the person committed an offense under Title 5, Penal Code, and:

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1. The date of the offense is more than 30 years before the date the person's employment will begin; and
2. The employee satisfied all terms of the court order entered on conviction.

Education Code 22A.157(a)-(b), 22A.201(a) [See DBAA]

Certification to
Commissioner

Each school year, a superintendent shall certify to the commissioner that the district has complied with the above provisions. *Education Code 22A.157(f)*

Sanctions

SBEC may impose a sanction on an educator who does not discharge an employee if the educator knows or should have known, through a criminal history record information review, that the employee has criminal history described in Discharge of Convicted Employees, above. *Education Code 22A.157(e)*

Termination for
Failure to Disclose

A district may discharge an employee if the district obtains information of the employee's conviction of a felony or of a misdemeanor involving moral turpitude that the employee did not disclose to SBEC or the district. An employee so discharged is considered to have been discharged for misconduct for purposes of Labor Code 207.044 (unemployment compensation). *Education Code 22A.157(d)*

**Certain Offenses
Against Students**

Mandatory
Termination

If a district receives notice that SBEC has revoked the certificate of a person based on the offenses listed at Discharge of Convicted Employees, the district shall:

1. Immediately remove the person whose certificate has been revoked from campus or from an administrative office, as applicable, to prevent the person from having any contact with a student; and
2. For a person employed under a Chapter 21 probationary or term contract, with the approval of the board or its designee:
 - a. Suspend the person without pay;
 - b. Provide the person with written notice that the person's contract is void [see Notice to Employee, below]; and
 - c. Terminate the employment of the person as soon as practicable.

Education Code 22A.201(a), (c)

Discretionary
Termination

If a district becomes aware that a person employed by the district under a probationary or term contract under Chapter 21 has been convicted of or received deferred adjudication for a felony offense, and the person is not subject to the mandatory termination provi-

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sion above, the district may, with the approval of the board or its designee:

1. Suspend the person without pay;
2. Provide the person with written notice that the person's contract is void [see Notice to Employee, below]; and
3. Terminate the employment of the person as soon as practicable.

Education Code 22A.201(d)

Notice to Employee

A person's probationary or term contract under Chapter 21 is void if, with the approval of the board or its designee, the district provides written notice to the person, under the mandatory or discretionary termination provisions above, that the person's contract is void. *Education Code 22A.201(e)*

No Appeal

Action taken by a district under the mandatory or discretionary terminations provisions above is not subject to appeal under Education Code Chapter 21 and the notice and hearing requirements of Chapter 21 do not apply to the action. *Education Code 22A.201(g)*

**Invalid or Expired
Certification**

An employee's probationary or term contract is void if the employee:

1. Does not hold a valid certificate or permit issued by SBEC;
2. Fails to fulfill the requirements necessary to renew or extend the employee's temporary, probationary, or emergency certificate or any other certificate or permit issued under Education Code Chapter 21, Subchapter B; or
3. Fails to comply with any requirement under Education Code Chapter 22, Subchapter C [criminal history review, see DBAA], if the failure results in suspension or revocation of the employee's certificate.

Education Code 21.0031(a)

A certificate or permit is not considered to have expired if:

1. The employee has completed the requirements for renewal of the certificate or permit;
2. The employee submitted the request for renewal before the expiration date; and

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3. The date the certificate or permit would have expired is before the date SBEC takes action to approve the renewal of the certificate or permit.

Education Code 21.0031(f)

District's Options

If a district has knowledge that an employee's contract is void under Education Code 21.0031(a), the district may:

1. Terminate the employee;
2. Suspend the employee with or without pay; or
3. Retain the employee for the remainder of the school year on an at-will employment basis in a position that does not require a contract under Education Code 21.002, at the employee's existing rate of pay or at a reduced rate.

The employee is not entitled to the minimum salary prescribed by Education Code 21.402.

Education Code 21.0031(b)

Exception

A district may not terminate or suspend an employee under 21.0031(b) because of the employee's lack of a valid certificate or permit, or failure to renew or extend a certificate or permit, if:

1. The employee requests an extension from SBEC to renew, extend, or otherwise validate the employee's certificate or permit; and
2. Not later than the 10th day after the date the contract is void, the employee takes necessary measures to renew, extend, or otherwise validate the employee's certificate or permit, as determined by SBEC.

Education Code 21.0031(b-1)

No Appeal or
Chapter 21 Hearing

A school district's decision under Education Code 21.0031(b) is not subject to appeal under Education Code Chapter 21, and the notice and hearing requirements of that chapter do not apply to the decision. *Education Code 21.0031*

Applicability

These void contract provisions do not affect the rights and remedies of a party in an at-will employment relationship and do not apply to a certified teacher assigned to teach a subject for which the teacher is not certified. *Education Code 21.0031; Nunez v. Simms, 341 F.3d 385 (5th Cir. 2003)*

Report to SBEC

A superintendent shall report the educator's termination to SBEC if the conditions set forth at Education Code 22A.051 exist. [See DHB]

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**Report to
Superintendent**

A principal shall report the educator's termination to the superintendent if the conditions set forth at Education Code 22A.051 exist. [See DPA]

**Falsification of
Military Record**

A district may discharge an employee, regardless of whether the employee is employed under an employment contract, if the district determines, based on a reasonable factual basis, that the employee, in obtaining the employee's employment or any benefit relating to the employee's employment, falsified or otherwise misrepresented any information regarding the employee's military record in a manner that would constitute an offense under Penal Code 32.54.

An employment contract entered into by a district with an employee discharged by the employer under Labor Code Chapter 105 is void and unenforceable as against public policy. [See DF series]

Labor Code Ch. 105

**Prohibition on
Diversity, Equity,
and Inclusion**

A district shall adopt a policy and procedure for the appropriate discipline, including termination, of a district employee or contractor who intentionally or knowingly engages in or assigns to another person diversity, equity, and inclusion duties. The district shall provide a physical and electronic copy of the policy and procedure to each district employee or contractor.

The policy and procedure adopted by a district must ensure that an employee or contractor receives adequate due process and an opportunity to appeal disciplinary actions, including termination, in the same manner provided for other disciplinary actions. [See BT]

Education Code 11.005(c)-(d)

**Prohibited
Classroom
Instruction**

A district shall adopt a policy and procedure for the appropriate discipline, including termination, of a district or school employee or contractor who intentionally or knowingly engages in or assigns to another person an act prohibited by Education Code 28.0022 (Certain Instructional Requirements and Prohibitions). The district shall provide a physical and electronic copy of the policy and procedure to each district or school employee or contractor. [See EMB] *Education Code 28.0022(h)*

EMPLOYEE STANDARDS OF CONDUCT

DH
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Each District employee shall perform his or her duties in accordance with state and federal law, District policy, and ethical standards. The District holds all employees accountable to the Educators' Code of Ethics. [See DHA(LEGAL)]

Each District employee shall recognize and respect the rights of students, parents, other employees, and members of the community and shall work cooperatively with others to serve the best interests of the District.

An employee wishing to express concern, complaints, or criticism shall do so through appropriate channels. [See DGBA]

**Violations of
Standards of
Conduct**

Each employee shall comply with the standards of conduct set out in this policy and with any other policies, regulations, and guidelines that impose duties, requirements, or standards attendant to his or her status as a District employee. Violation of any policies, regulations, or guidelines, including intentionally making a false claim, offering a false statement, or refusing to cooperate with a District investigation, may result in disciplinary action, including termination of employment. [See DCD, DCE, and DF series]

Weapons Prohibited

The District prohibits the use, possession, or display of any firearm, location-restricted knife, club, or prohibited weapon, as defined at FNCG, on District property at all times.

Exceptions

No violation of this policy occurs when:

1. Use or possession of a firearm by a specific employee is authorized by Board action [see the CKE series];
2. A District employee who holds a handgun license in accordance with state law stores a handgun or other firearm in a locked vehicle in a parking lot, parking garage, or other parking area provided by the District, provided the handgun or other firearm is not in plain view; or
3. The use, possession, or display of an otherwise prohibited weapon takes place as part of a District-approved activity supervised by proper authorities. [See FOD]

**Electronic
Communication**

Use with Students

A certified employee, licensed employee, or any other employee designated in writing by the Superintendent or a campus principal may use electronic communication, as this term is defined by law, with currently enrolled students only about matters within the scope of the employee's professional responsibilities.

Unless an exception has been made in accordance with the employee handbook or other administrative regulations, an employee

EMPLOYEE STANDARDS OF CONDUCT

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shall not use a personal electronic communication platform, application, or account to communicate with currently enrolled students.

Unless authorized above, all other employees are prohibited from using electronic communication directly with students who are currently enrolled in the District. The employee handbook or other administrative regulations shall further detail:

1. Exceptions for family and social relationships;
2. The circumstances under which an employee may use text messaging to communicate with individual students or student groups;
3. Hours of the day during which electronic communication is discouraged or prohibited; and
4. Other matters deemed appropriate by the Superintendent.

In accordance with ethical standards applicable to all District employees [see DHA(LEGAL)], an employee shall be prohibited from using electronic communications in a manner that constitutes prohibited harassment or abuse of a District student; adversely affects the student's learning, mental health, or safety; includes threats of violence against the student; reveals confidential information about the student; or constitutes an inappropriate communication with a student, as described in the Educators' Code of Ethics.

An employee shall have no expectation of privacy in electronic communications with students. Each employee shall comply with the District's requirements for records retention and destruction to the extent those requirements apply to electronic communication. [See CPC]

Personal Use	All employees shall be held to the same professional standards in their public use of electronic communication as for any other public conduct. If an employee's use of electronic communication violates state or federal law or District policy, or interferes with the employee's ability to effectively perform his or her job duties, the employee is subject to disciplinary action, up to and including termination of employment.
Reporting Improper Communication	In accordance with administrative regulations, an employee shall notify his or her supervisor when a student engages in improper electronic communication with the employee.
Disclosing Personal Information	An employee shall not be required to disclose his or her personal email address or personal phone number to a student.

EMPLOYEE STANDARDS OF CONDUCT

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Prohibited Classroom Instruction or Activities	An employee is prohibited from intentionally or knowingly engaging in or assigning to another individual instruction, guidance, activities, or programming prohibited by law [see EMB].
Prohibited Diversity, Equity, and Inclusion Duties	An employee shall be subject to disciplinary action, including termination of employment, if the employee, intentionally or knowingly: • Engages in diversity, equity, and inclusion (DEI) duties. • Assigns to another individual DEI duties. [See BT(LEGAL)]
Social Transitioning	An employee shall be prohibited from assisting a District student with social transitioning, as the term is defined in law. This prohibition includes providing any information to a District student about social transitioning or guidelines intended to assist a District student with social transitioning.
Safety Requirements	Each employee shall adhere to District safety rules and regulations and shall report unsafe conditions or practices to the appropriate supervisor.
Use of Profanity Prohibited	No employee shall direct profane language at a student, parent, visitor, or another District employee.
Harassment or Abuse	An employee shall not engage in prohibited harassment, including sexual harassment, of: 1. Other employees. [See DIA] 2. Students. [See FFH; see FFG regarding child abuse and neglect.] While acting in the course of employment, an employee shall not engage in prohibited harassment, including sexual harassment, of other persons, including Board members, vendors, contractors, volunteers, or parents. An employee shall report child abuse or neglect as required by law. [See FFG]
Relationships with Students	An employee shall not form romantic or other inappropriate social relationships with students. Any sexual relationship between a student and a District employee is always prohibited, even if consensual. As required by law, the District shall notify the parent of a student with whom a District employee or person acting as a service provider for the District is alleged to have engaged in certain misconduct.

EMPLOYEE STANDARDS OF CONDUCT

DH
(LOCAL)

[See FFF for parent notification requirements and DHB and DHC for reporting requirements.]

**Tobacco and
Nicotine Products
and E-Cigarettes**

An employee is prohibited from possessing or using any type of tobacco product, e-cigarette, or any other electronic vaporizing device while on school property, in a District vehicle, or while attending an off-campus school-related activity. An employee is also prohibited from possessing or using any type of nicotine product, including nicotine pouches, regardless of whether the product contains tobacco, while on District property, in a District vehicle, or while attending an off-campus school-related activity.

An employee's supervisor is authorized to approve an exception to this policy for a smoking cessation product.

**Alcohol and Drugs /
Notice of Drug-Free
Workplace**

As a condition of employment, an employee shall abide by the terms of the following drug-free workplace provisions. An employee shall notify the Superintendent in writing if the employee is convicted for a violation of a criminal drug statute occurring in the workplace in accordance with Arrests, Indictments, Convictions, and Other Adjudications, below.

An employee shall not manufacture, distribute, dispense, possess, use, or be under the influence of any of the following substances during working hours while on District property or at school-related activities during or outside of usual working hours:

1. Any controlled substance or dangerous drug as defined by law, including but not limited to marijuana, any narcotic drug, hallucinogen, stimulant, depressant, amphetamine, or barbiturate.
2. Alcohol or any alcoholic beverage.
3. Any abusable glue, aerosol paint, or any other chemical substance for inhalation.
4. Any other intoxicant or mood-changing, mind-altering, or behavior-altering drug.

An employee need not be legally intoxicated to be considered "under the influence" of a controlled substance.

Exceptions

It shall not be considered a violation of this policy if the employee:

1. Manufactures, possesses, or dispenses a substance listed above as part of the employee's job responsibilities;
2. Uses or possesses a controlled substance or drug authorized by a licensed physician prescribed for the employee's personal use; or

EMPLOYEE STANDARDS OF CONDUCT

DH
(LOCAL)

3. Possesses a controlled substance or drug that a licensed physician has prescribed for the employee's child or other individual for whom the employee is a legal guardian.

Sanctions

An employee who violates these drug-free workplace provisions shall be subject to disciplinary sanctions. Sanctions may include:

1. Referral to drug and alcohol counseling or rehabilitation programs;
2. Referral to employee assistance programs;
3. Termination from employment with the District; and
4. Referral to appropriate law enforcement officials for prosecution.

Notice

Employees shall receive a copy of this policy.

**Arrests, Indictments,
Convictions, and
Other Adjudications**

An employee shall notify his or her principal or immediate supervisor within three calendar days of any arrest, indictment, conviction, no contest or guilty plea, or other adjudication of the employee for any felony, any offense involving moral turpitude, and any of the other offenses as indicated below:

1. Crimes involving school property or funds;
2. Crimes involving attempt by fraudulent or unauthorized means to obtain or alter any certificate or permit that would entitle any person to hold or obtain a position as an educator;
3. Crimes that occur wholly or in part on school property or at a school-sponsored activity; or
4. Crimes involving moral turpitude, which include:
 - Dishonesty; fraud; deceit; theft; misrepresentation;
 - Deliberate violence;
 - Base, vile, or depraved acts that are intended to arouse or gratify the sexual desire of the actor;
 - Felony possession or conspiracy to possess, or any misdemeanor or felony transfer, sale, distribution, or conspiracy to transfer, sell, or distribute any controlled substance defined in Chapter 481 of the Health and Safety Code;
 - Felony driving while intoxicated (DWI); or
 - Acts constituting abuse or neglect under the Texas Family Code.

EMPLOYEE STANDARDS OF CONDUCT

DH
(LOCAL)

Dress and Grooming An employee's dress and grooming shall be clean, neat, in a manner appropriate for his or her assignment, and in accordance with any additional standards established by his or her supervisor and approved by the Superintendent.

MISCELLANEOUS INSTRUCTIONAL POLICIES
TEACHING ABOUT CONTROVERSIAL ISSUES

EMB
(LEGAL)

**Exemption from
Instruction**

A parent or person standing in parental relation is entitled to remove the parent's child from a class or other school activity that conflicts with the parent's religious or moral beliefs if the parent presents or delivers to the teacher of the parent's child a written statement authorizing the removal of the child from the class or other school activity.

A parent or person standing in parental relation is not entitled to remove the parent's child from a class or other school activity to avoid a test or to prevent the child from taking a subject for an entire semester. This provision does not exempt a child from satisfying grade level or graduation requirements in a manner acceptable to the district and the Texas Education Agency (TEA).

Education Code 26.002, .010

See also *Mahmoud v. Taylor*, 145 S.Ct. 2332 (2025) (holding that the introduction of certain public school instruction, without parental notice and an opportunity to opt out, would likely burden parents' right to free exercise of religion).

**Instructional
Requirements and
Prohibitions**

Controversial
Topics

The following provisions under Education Code 28.0022(a) apply to any course or subject, including an innovative course, for a grade level from kindergarten through grade 12.

A teacher may not be compelled to discuss a widely debated and currently controversial issue of public policy or social affairs.

A teacher who chooses to discuss a topic described above shall explore that topic objectively and in a manner free from political bias.

Education Code 28.0022(a)(1)-(a)(2)

Sexual Orientation
and Gender Identity

A district or district employee may not provide or allow a third party to provide instruction, guidance, activities, or programming regarding sexual orientation and gender identity to students enrolled in prekindergarten through 12th grade.

This provision may not be construed to:

1. Limit a student's ability to engage in speech or expressive conduct protected by the First Amendment, U.S. Constitution or by Section 8, Article I, Texas Constitution, that does not result in material disruption to school activities;
2. Limit the ability of a person who is authorized by the district to provide physical or mental health-related services to provide the services to a student, subject to any required parental consent; or

MISCELLANEOUS INSTRUCTIONAL POLICIES
TEACHING ABOUT CONTROVERSIAL ISSUES

EMB
(LEGAL)

3. Prohibit an organization whose membership is restricted to one sex and whose mission does not advance a political or social agenda from meeting on a district campus.

Education Code 28.0043

Political Activism
and Advocacy
Participation

A district or teacher may not require, make part of a course, or award a grade or course credit, including extra credit, for a student's:

1. Work for, affiliation with, or service learning in association with any organization engaged in:
 - a. Lobbying for legislation at the federal, state, or local level, if the student's duties involve directly or indirectly attempting to influence social or public policy or the outcome of legislation; or
 - b. Social policy advocacy or public policy advocacy;
2. Political activism, lobbying, or efforts to persuade members of the legislative or executive branch at the federal, state, or local level to take specific actions by direct communication; or
3. Participation in any internship, practicum, or similar activity involving social policy advocacy or public policy advocacy.

Education Code 28.0022(a)(3)

The above provisions do not apply to a student's participation in:

1. Community charitable projects, such as building community gardens, volunteering at local food banks, or other service projects;
2. An internship or practicum:
 - a. For which the student receives course credit under a career and technology education program or under the P-TECH program established under Education Code 29.553; and
 - b. That does not involve the student directly engaging in lobbying, social policy advocacy, or public policy advocacy; or
3. A program that prepares the student for participation and leadership in this country's democratic process at the federal, state, or local level through the simulation of a governmental process, including the development of public policy.

Education Code 28.0022(b)

MISCELLANEOUS INSTRUCTIONAL POLICIES
TEACHING ABOUT CONTROVERSIAL ISSUES

EMB
(LEGAL)

Concepts Prohibited A teacher, administrator, or other employee of a district may not require or make part of a course inculcation in the concept that:

1. One race or sex is inherently superior to another race or sex;
2. An individual, by virtue of the individual's race or sex, is inherently racist, sexist, or oppressive, whether consciously or unconsciously;
3. An individual should be discriminated against or receive adverse treatment solely or partly because of the individual's race or sex;
4. An individual's moral character, standing, or worth is necessarily determined by the individual's race or sex;
5. An individual, by virtue of the individual's race or sex, bears responsibility, blame, or guilt for actions committed by other members of the same race or sex;
6. Meritocracy or traits such as a hard work ethic are racist or sexist or were created by members of a particular race to oppress members of another race;
7. The advent of slavery in the territory that is now the United States constituted the true founding of the United States; or
8. With respect to their relationship to American values, slavery and racism are anything other than deviations from, betrayals of, or failures to live up to the authentic founding principles of the United States, which include liberty and equality.

A teacher, administrator, or other employee of a district may not teach, instruct, or train any administrator, teacher, or staff member of a state agency, school district, or open-enrollment charter school to adopt a concept listed above.

A teacher, administrator, or other employee of a district may not require an understanding of The 1619 Project.

Education Code 28.0022(a)(4)

*Student
Discussion*

A district may not implement, interpret, or enforce any rule in a manner that would result in the punishment of a student for reasonably discussing the concepts described above in school or during a school-sponsored activity or have a chilling effect on reasonable student discussions involving those concepts in school or during a school-sponsored activity. *Education Code 28.0022(d)*

MISCELLANEOUS INSTRUCTIONAL POLICIES
TEACHING ABOUT CONTROVERSIAL ISSUES

EMB
(LEGAL)

Employee or
Contractor
Discipline Policy

A district shall adopt a policy and procedure for the appropriate discipline, including termination, or a district employee or contractor who intentionally or knowingly engages in or assigns to another person an act prohibited by Education Code 28.0022. The district shall provide a physical and electronic copy of the policy and procedure to each district employee or contractor. *Education Code 28.0022(h)*

Limitations on
Statute

Education Code 28.0022 may not be construed as limiting the teaching of or instruction in the essential knowledge and skills adopted under Education Code Chapter 28, Subchapter A.

Education Code 28.0022 does not create a private cause of action against a teacher, administrator, or other employee of a district.

Education Code 28.0022 may not be construed as prohibiting a teacher employed by a district from directing a classroom activity that involves students communicating with an elected official so long as the district, school, or teacher does not influence the content of a student's communication.

Education Code 28.0022(e)-(g)

Priority 1 - Academic Progress Report

BELTON ISD BOARD OF TRUSTEES

Regular Meeting

September 21, 2026

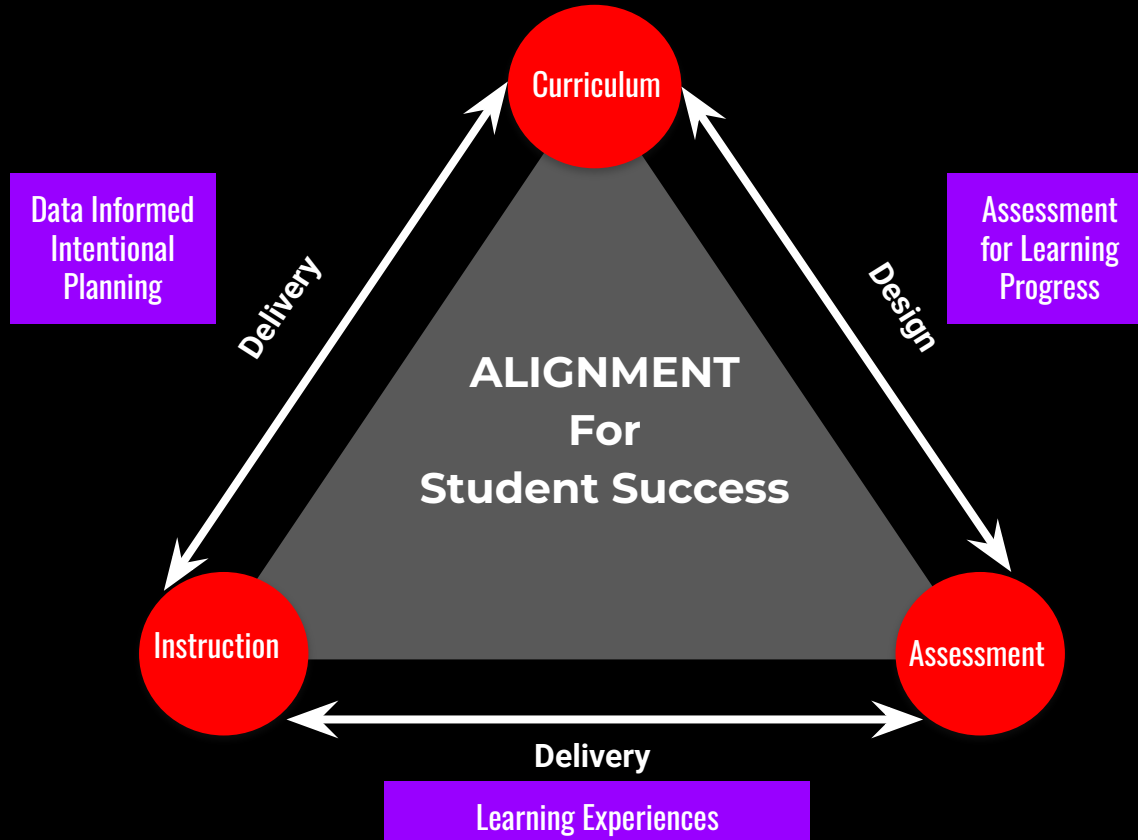


Purpose



To provide a report on our beginning of school year student performance baselines and the strategies to ensure each and every student meets their individual student growth targets.

Alignment

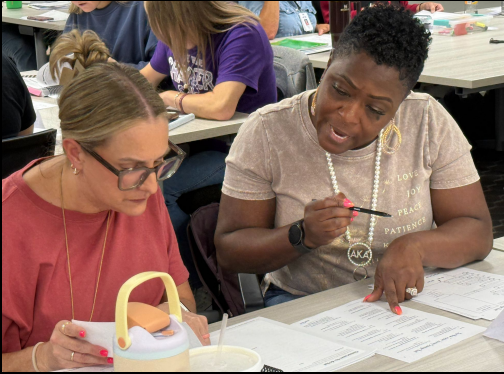


STAR Renaissance

Universal Screener
Diagnostic
Progress Monitoring

Beginning-of-year screeners establish baselines and generate Student Growth Projections, which serve as the foundation for our targeted academic support plans.

Focus



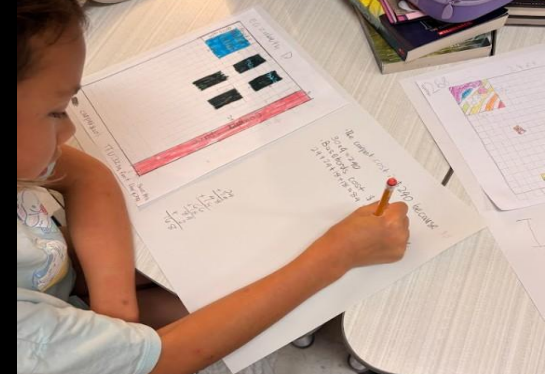
Refining Professional Learning Communities

Using standardized protocols that ensure focus on evidence of student learning in planning.



Leverage High Quality Instructional Materials

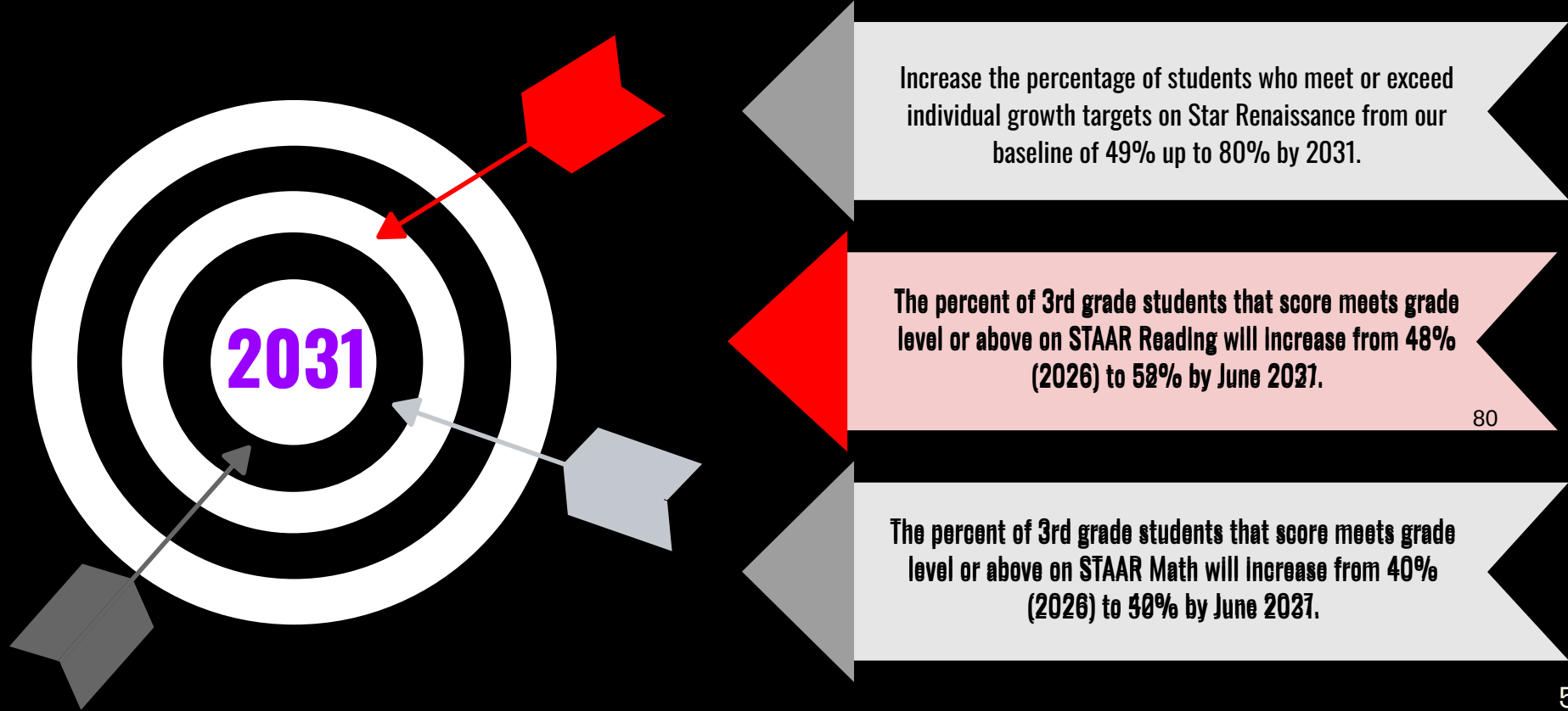
To guarantee intentional and rigorous learning experiences that are responsive and timely to student needs.



Student Growth & Achievement

Through tiered support systems, with a district wide focus on student growth.

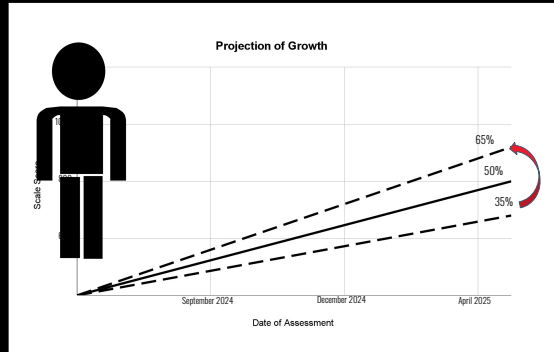
HB 3 Targets



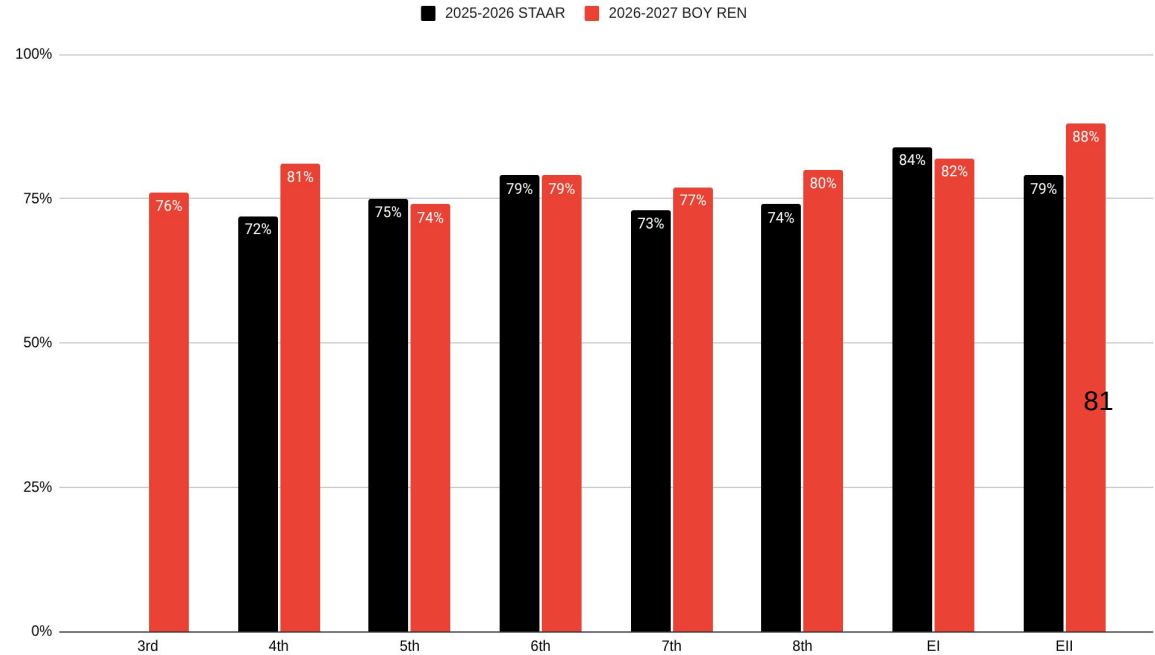
Reading Screening

52%

Current Student
Growth Percentile



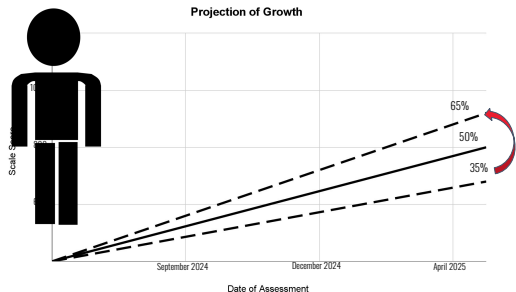
25-26 STAAR VS 26-27 BOY REN COHORT



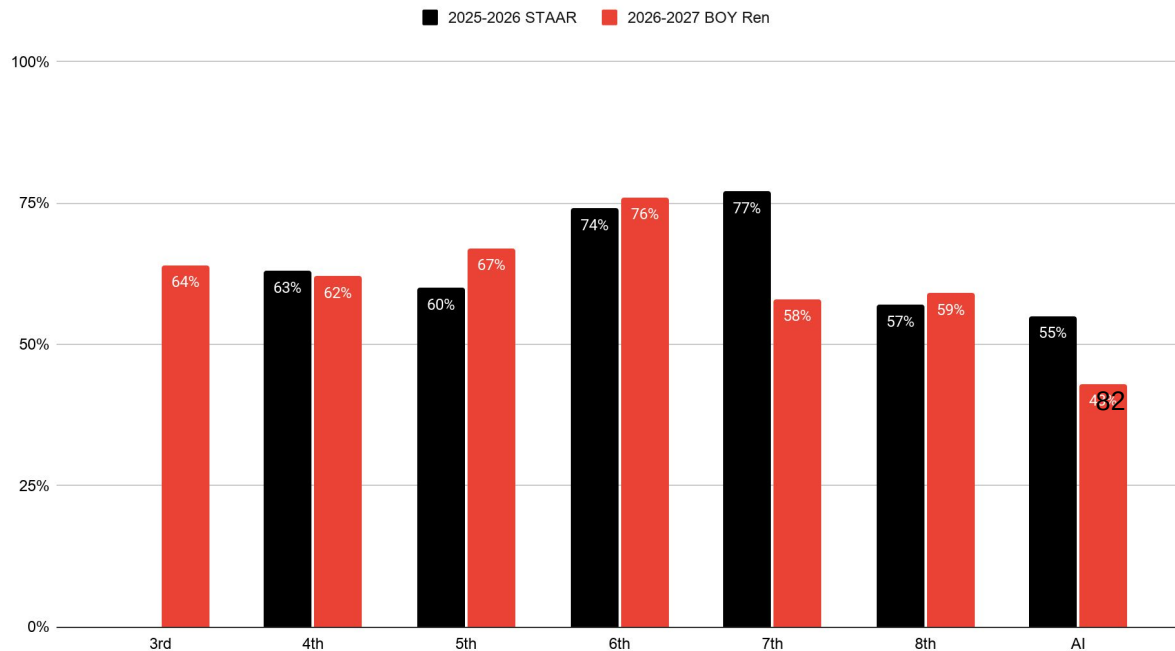
Math Screening

44%

Current Student
Growth Percentile



25-26 MATH STAAR VS 26-27 BOY REN COHORT APPROACHES & ABOVE

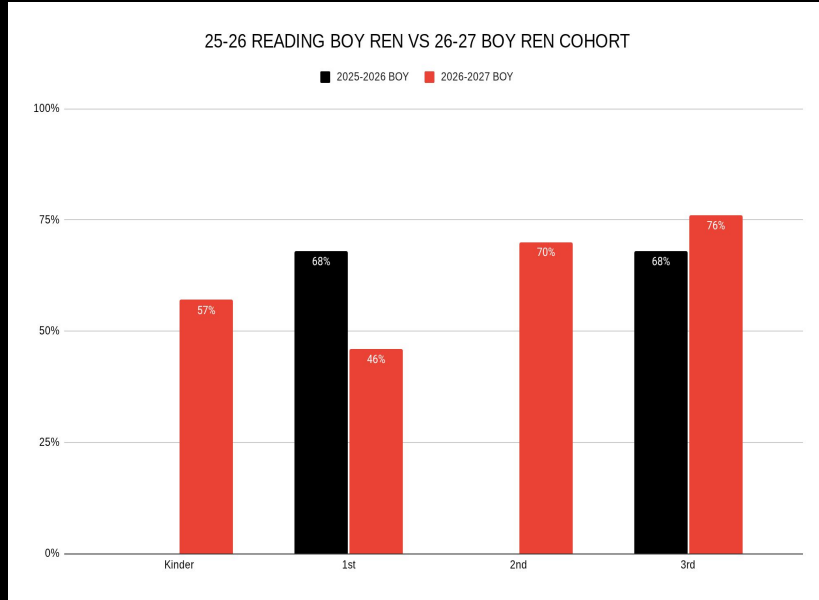


*Data Source: 2025-2026 and 2026-2027 STAR Renaissance Data

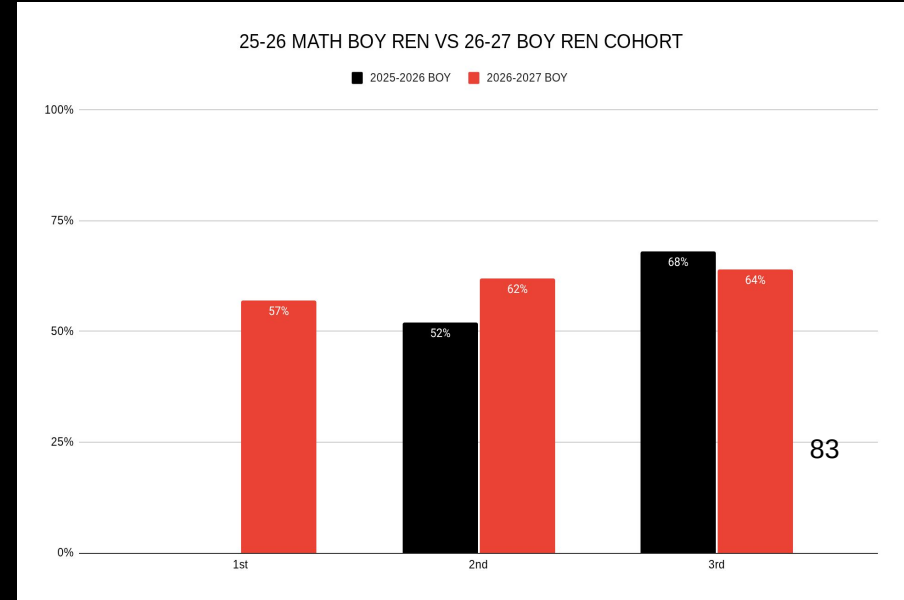
*Note: 1st grade took a different screener in kindergarten (Renaissance Early Literacy)

*Note: Algebra I in 25-26 are a different set of students testing, since some current 9th graders are in Geometry

Early Literacy & Numeracy



Reading



Math

Leveraging Data



COLLABORATE

Teams utilize standardized process to analyze this data and plan instructional responses for students in need of intervention and acceleration.



SET TARGETS

Teachers use BOY Student Growth Projections to set personalized, academic goals with students.



DELIVER & MONITOR

Teachers must deliver high quality instruction aligned to needs and actively reflect on evidence of learning with students to ensure steady progress toward targets.

ALL SUPPORTED THROUGH HIGH QUALITY PROFESSIONAL LEARNING

Progress Monitoring

MOY (WINTER)

Mid-year progress check to
adjust interventions and track
goal trajectory.

SUMMER

Strategic review by leadership
to refine district-wide
instructional plans.

BOY (FALL)

Assess baselines, generate
growth projections, and set
individual targets.

EOY (SPRING)

Final measure of student growth
against the learning targets.

Discussion





SUPERINTENDENT'S REPORT

Empower **each** and **every** learner to pursue their dreams and enrich their communities.

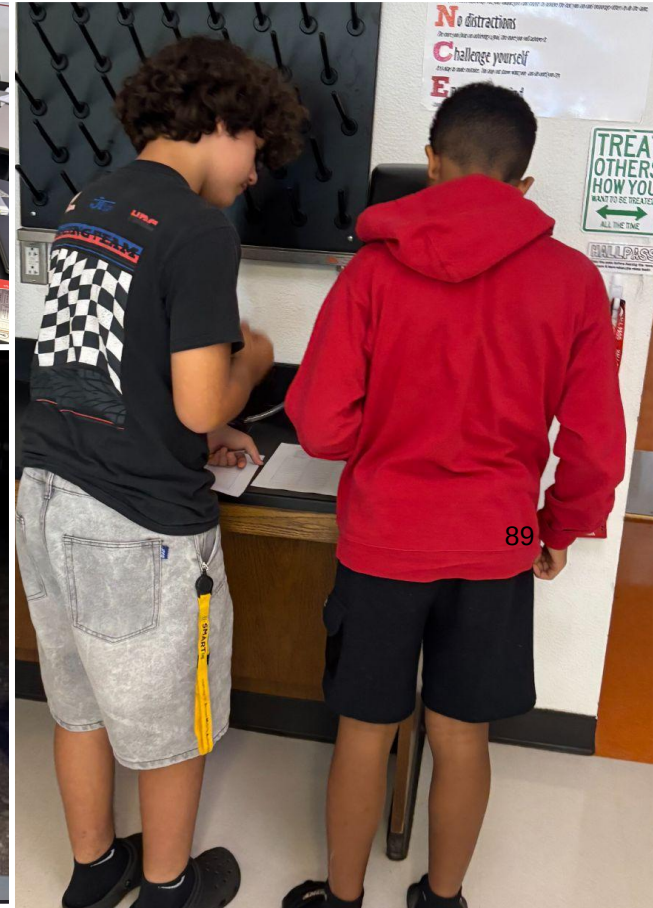
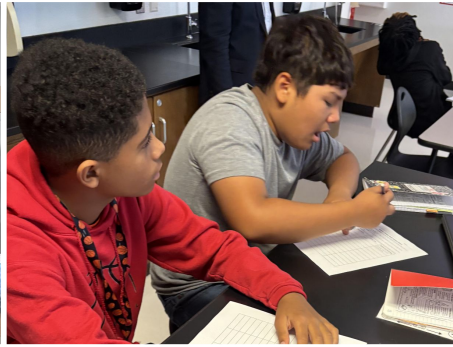
MISSION

Empower each and every learner to pursue their dreams and enrich their communities.



Priority 1 - Students

3



89



Priority 2 - Staff



Priority 3 - Community



FutureU

EARLY COLLEGE ELEMENTARY DAY

EXPLORE • LEARN • BELONG • BECOME

Belton ISD 3rd graders will launch into career connected learning while building early awareness of post-secondary opportunities that can shape their futures.

Hosted in partnership with Temple College, FutureU provides an immersive, age-appropriate experience where students participate in interactive rotations that introduce a variety of career pathways aligned with the Belton Career Builders programs of study. Students will also explore the college environment to begin envisioning themselves as future college students.

Together, the immersive learning experiences and the exploration of the college environment foster curiosity, inspire dreams, and connect education to future possibilities - reinforcing the importance of learning, goal setting, and future readiness from an early age.



Campus Visit Schedule

Day 1 - Friday, October 23rd

Leon Heights
Southwest
Tarver
Chisholm
Charter Oak
Burrell

Day 2 - Friday, November 6th

Lakewood
Sparta
Pirtle
High Point
Hubbard



Buses will pick up at 9:00am and leave Temple College at 2:00pm.



Students will need to bring a sack lunch from home or pick up a sack lunch from the cafeteria before loading the bus at 9:00am.



Future-ready starts here.

Today Explorers. Tomorrow Leaders.



DREAM EXPLORE LEARN GROW

SAME STEPS & BIGGER HORIZONS





SUPERINTENDENT'S REMARKS



92

Inspiring Dreams. Empowering Futures

Belton Independent School District

Workshop Meeting Minutes

Board Workshop Meeting, August 17, 2026 - 5:00 p.m.

Dragon Room, 400 N. Wall Street, Belton TX, 76513

Board Members Present:

Chris Flor

Erin Bass

Rucker Preston

Brandon Bozon

Manuel Alcozer

Jeff Norwood

Riley Beck

Board Members Absent:

1. Call to Order:

Chris Flor, Board President, called the workshop meeting of the Belton Independent School District Board of Trustees to order at 5:00 p.m. He stated that a quorum of Board Members was present, that the meeting had been duly called, noting that he was joining the meeting remotely, and that notice of the meeting had been posted in accordance with the Texas Open Meetings Act, Texas Government Code Chapter 551.

2. Public Comments:

None.

3. Board Workshop

A. Priority 4: 2026-2027 Proposed Budget & Tax Rate

Ms. Melissa Lafferty, Chief Financial Officer, reviewed the general fund 2025-2026 original budget, final amended budget, the estimated actual budget, along with the 2026-2027 proposed budget. Ms. Lafferty highlighted a projected surplus for the previous fiscal year, which bolstered the district's financial reserves to 23%. Key priorities in the new proposal include a 1.5% staff salary increase and nearly \$1.8 million dedicated to special education positions. The board also reviewed a lower total tax rate compared to previous years, noting that property values remained stagnant and the district avoided a tax increase. Additional discussions covered mandatory accelerated instruction funding, debt service management, and the school nutrition program's strategy for handling its fund balance. Through collaborative planning, the district successfully moved from past fiscal concerns to a stable financial position while addressing essential facility and instructional needs.

Adjourn: There being no further business, the meeting was adjourned at 5:30 p.m.

Chris Flor, Board President

Rucker Preston, Board Secretary

Belton Independent School District

Regular Board Meeting Minutes

Regular Board Meeting, August 17, 2026 - 6:15 p.m.

Pittenger Fine Arts Center, 400 N. Wall Street, Belton, TX 76513

Board Members Present:

Chris Flor
Erin Bass
Rucker Preston
Brandon Bozon

Manuel Alcozer
Jeff Norwood
Riley Beck

Board Members Absent:

1. Call to Order, Moment of Silence, and Pledge of Allegiance

Chris Flor, Board President, called the regular meeting of the Belton Independent School District Board of Trustees to order at 6:15 p.m. He stated that a quorum of Board Members was present, that he was joining the meeting remotely, that the meeting had been duly called, and notice of the meeting had been posted in accordance with the Texas Open Meetings Act, Texas Government Code Chapter 551.

In order to ensure an effective meeting, President Chris Flor yielded the chair to Vice President Erin Bass, who presided over the remainder of the meeting.

2. Recognitions

Student Pledges – Chisholm Trail Elementary School

This evening, the pledges were led by third graders Charlotte Bohannon and Emma Gresham from Chisholm Trail Elementary School.

Student Showcase - Belton High School Drumline

The evening's showcase featured the Belton High School Drumline, bringing the energy, precision and passion that make percussion a crowd favorite.

Under the direction of Ian Smith, this year's ensemble is the largest Belton High School drumline in the past 10 years. Last season, the group was the highest-scoring 5A high school at the Drums in the Heartland percussion contest and earned the Best Front Ensemble award.

National History Day National Qualifiers

The Board congratulated the Lake Belton Middle School and Lake Belton High School documentary teams for their outstanding accomplishments at the National History Day Contest.

Both teams were selected to present their research during the National History Day Documentary Showcase at the Smithsonian's National Museum of African American History and Culture in Washington, D.C., an honor awarded to only 22 documentary teams from across the country.

The celebration continued as the Lake Belton Middle School team captured the National History Day Junior Group Documentary national championship, earning first place in the nation.

Department Showcase: Teaching and Learning

The evening's department showcase highlighted the Belton ISD Teaching and Learning team, which supports students and educators across all 20 campuses.

The Board thanked the Teaching and Learning team for their dedication to supporting our schools and helping students succeed.

Community Partner – CGI

The District recognized CGI as a valued community partner for its continued investment in Belton ISD students.

From providing backpacks and school supplies through Project Heartbeat to donating Christmas gifts for McKinney-Vento students, CGI helps remove barriers and support students when they need it most.

3. Public Comments Regarding Items on the Agenda

None.

4. Public Hearing

A. Priority 4: Public Hearing Regarding 2026-2027 Budget and Proposed Tax Rate

Melissa Lafferty, Chief Technology Officer, presented the proposed 2026-2027 Accelerated Instruction budget, the fiscal year budget, and the proposed 2026-2027 tax rate.

There being no public hearing commenters, Ms. Erin Bass opened and closed the public hearing at 6:34 p.m.

5. Action Items

A. Consider, Discuss, and Take Appropriate Action Regarding Adoption of the Budget for Accelerated Instruction for the 2026-2027 School Year

Jeff Norwood made a motion, seconded by Rucker Preston, to adopt the budget for accelerated instruction for the 2026-2027 school year as presented. The motion passed unanimously, (7-0).

B. Priority 4: Consider, Discuss, and Take Appropriate Action Regarding Adoption of the Budget for the 2026-2027 School Year

Brandon Bozon made a motion, seconded by Riley Beck, to adopt the fiscal year budget for 2026-2027 as presented. The motion passed unanimously, (7-0).

C. Consider, Discuss, and Take Appropriate Action Regarding Resolutions Adopting the Tax Rate for the 2026-2027 School Year.

Brandon Bozon made a motion to approve the resolution adopting a maintenance and operations tax rate of \$0.7552 and a debt service tax rate of \$0.3625 for a total tax rate of \$1.1177. Rucker Preston seconded the motion. The motion passed unanimously, (7-0).

D. Consider, Discuss, and Take Appropriate Action Regarding Naming a Delegate and Alternate to the 2026 TASB Delegate Assembly.

Jeff Norwood made a motion to nominate Rucker Preston as TASB Delegate, and Erin Bass as Alternate, to the 2026 Delegate Assembly in October. The motion was seconded by Riley Beck. The motion passed unanimously, (7-0).

E. Priority 3 & 4: Consider, Discuss, and Take Appropriate Action Regarding Commission of a Citizens Bond Advisory Committee

Rucker Preston made a motion, seconded by Manuel Alcozer, to commission a Citizens Bond Advisory Committee as presented. The motion passed unanimously, (7-0).

6. Reports:

A. Priority 4: Bond & Capital Projects Report

Dr. Michael Morgan, Deputy Superintendent, provided an update to the Board on the 2022 Bond Projects.

2022 Bond Projects 100% Completion: All projects scheduled under the \$168 million Proposition A (passed in May 2022) have been successfully completed.

Reinvestment of Remaining Bond Funds

Over \$2 Million Invested: Leftover funds from the completed 2022 bond projects were reinvested into additional safety and MEP initiatives across the district.

Maintenance and Operations (M&O) Capital Projects

\$2.8 Million Investment: The district dedicated \$2.8 million of its M&O funds to address several crucial, non-bond facility needs like roof replacements at the Transportation and DAEP, cloud-based security camera upgrades at LBHS playground equipment replacement at Pirtle Elementary, turf replacement and new LED stadium lighting at Tiger Field and updating the district's facility master plan and educational specifications.

Direct Input-Driven Summer Projects

Impact & Budget: Utilizing a dedicated summer projects budget, the district spent \$275,000 of an allocated \$300,000 to complete projects across 12 campuses. These quick-turnaround projects included security and accessibility enhancements, hallway and common space painting, adding a second staff restroom at DAP, and power washing and restriping fire lanes at all campuses.

Future Outlook & Next Steps

\$3.6 Million in Available Funding: Belton ISD conservatively estimates \$2.8 million in remaining 2022 bond funds. Combined with capital and summer project budgets, this will provide approximately \$3.6 million to address upcoming capital needs.

B. Priority 1: Strategic Plan Report

Dr. Morgan shared with the Board that Belton ISD has officially launched its five-year "Destination 2031" strategic plan, which was celebrated and introduced to over 2,100 staff members during the recent district convocation. Developed through extensive community and staff input, the roadmap is built around four key priorities: students, staff, community, and financial management. Having finalized the year-one objectives over the summer, the district is now moving into the execution phase and will present campus improvement plans aligned with these goals next month. See report.

C. Priority 1: Academic Progress Report

Gabi Nino, Assistant Superintendent of Teaching & Learning, shared with the Board that Belton ISD has maintained its overall state accountability rating of a "B" for the second consecutive year, building on progress from previous years of "C" ratings. Key academic highlights include a graduation rate of just under 98%, an "A" rating (94) in College, Career, and Military Readiness, and 11 campus distinctions earned across the district. To drive further growth and address gaps in student group performance, the district is introducing the new "Bluebonnet Math" curriculum, implementing common unit assessments, and enhancing teacher coaching. See report.

D. Board Committee Reports

1. Policy Committee

Ms. Erin Bass shared that 6 policies from Policy Update 127 were reviewed and are on the evening's consent agenda for 2nd reading, and that CDA(LOCAL) underwent its annual review and discussion as well.

2. Budget Committee

Mr. Rucker Preston provided a summary of the Budget Committee Meeting that included the aforementioned budget related action items.

E. Superintendent's Report

Dr. Malinda Golden, Superintendent, celebrated the District's annual convocation, which successfully brought together over 2,100 staff members and highlighted student accomplishments, including Belton ISD boasting the third largest FFA program in Texas. She also praised staff for one of the smoothest starts to a school year in her career, reporting high student engagement across all 21 campuses alongside excellent coordination from the transportation, custodial, and school nutrition teams.

F. Board Highlights

The Board shared that during their back-to-school campus visits, Trustees witnessed heartwarming student welcomes, including Mary Hardin-Baylor basketball players high-fiving students at Southwest Elementary and a board member personally guiding a lost freshman. They also highlighted vibrant high school traditions like Lake Belton's community-driven senior parking spot painting with LED projectors and Belton High's emotional "Tiger Mom" football camp. Finally, the board celebrated the success of the western-themed district convocation.

7. Consent Agenda: Consider and Take Appropriate Action

A. Minutes of Previous Meetings:

1. July 13, 2026 - Special Board Meeting
2. July 20, 2026 - Workshop Meeting
3. July 20, 2026 - Regular Meeting

B. Unaudited Financial Report for the Month Ending July 31, 2026

C. Gifts, Grants, and Bequests

D. Budget Amendment #11 for 2025-2026

E. Expenditures over \$100,000

1. Renewal of Renaissance for Nearpod, Freckle Math/Reading, STAR Literacy & Math Assessments

F. Supply, Equipment, and Service Bids

1. RFP #2065-275-419 Special Education Contracted & Consulting Services

G. Gate and Roadway Easement Agreement with WBW Single Development Group LLC

H. Resolution Regarding Designation of 2027 Non-Business Days for the Texas Public Information Act

I. Annual Resolution Regarding CDA(LOCAL) - Other Revenues: Investment

J. Renewal of Memorandum for Juvenile Justice Alternative Education Program (JJAEP)

K. Policy Update 127 - 2nd Reading

1. BJCF(LOCAL): Superintendent: Non-Renewal
2. DC(LOCAL): Employment Practices
3. DH(LOCAL): Employee Standards of Conduct
4. DP(LOCAL): Personnel Positions (Delete)
5. DPA(LOCAL): Personnel Position: Principals (Add)
6. DPB(LOCAL): Personnel Positions: Other Positions (Add)

Mr. Manuel Alcozer pulled item G. for discussion. Vice President Erin Bass proceeded onward for a motion, excluding item G.

Rucker Preston made a motion, seconded by Chris Flor, to approve the Consent Agenda, excluding item G., as presented. The motion passed unanimously, (7-0).

Dr. Malinda Golden provided more information on Consent Item G. Gate and Roadway Easement Agreement with WBW Single Development Group LLC. This allows safer transportation in and out of the Three Creeks Subdivision, funding approved by the County Commissioner.

Riley Beck made a motion, seconded by Brandon Bozon, to approve item G. as presented. The motion passed unanimously, (7-0).

8. Public Comments Regarding Non-Agenda Items

None.

9. Closed Session (Texas Government Code, Subchapters D and E)

The Board convened in closed session at 7:59 p.m.

- A. Student Disciplinary Matter - Texas Government Code, Section 551.082
- B. Personnel - Texas Government Code, Section 551.074
- C. Consultation with Attorney - Texas Government Code, Section 551.071
- D. Superintendent's Contract - Texas Government Code Section 551.071

10. Reconvene in Open Session

The Board reconvened in open session at 8:30 p.m.

11. Adjourn

There being no further business, the meeting was adjourned at 8:46 p.m.

Chris Flor, Board President

Rucker Preston, Board Secretary

Belton Independent School District
Board of Trustee Meeting Agenda Item
September 21, 2026

Item: Unaudited Financial Report for the Month Ending August 31, 2026

Contact Person: Melissa Lafferty

Presented for: ☒ Action ☐ Report Only

Supporting Documents: ☐ None ☒ Attached ☐ Provided Later

District Priority or Strategic Objective:

Priority 4: Fiscal Management - Maximize student experiences through transparent, strategic, and sustainable fiscal management.

Background Information:

Attached are the monthly financial and quarterly investment reports for the District. The reports represent the financial activity as of the close of the prior month for the General Fund 199, the Child Nutrition Fund 240, the Debt Service Fund 599, and the 2022 Bond Fund 622. These are unaudited figures, and an independent financial audit will be performed for the period ending August 31, 2026, and presented under separate cover.

The monthly financial and quarterly investment reports provide information on the District's cash and investment accounts including balances and investment transactions as of the close of the noted month in accordance with CDA(LEGAL).

Fiscal Implications:

For informational purposes only.

Administrative Recommendation(s):

Accept the monthly financial and quarterly investment reports as presented.



FINANCIAL STATEMENTS & INVESTMENT REPORT

TABLE OF CONTENTS

Description

- Financials – Unaudited Statements of Revenues and Expenditures
 - General Operating – 199
 - School Nutrition – 240
 - Debt Service – 599
- Project Summary for 2022 Bond Fund
- Investment Report – Monthly
- Investment Report - Quarterly

BELTON ISD
Statement of Unaudited Revenues and Expenditures Budget VS. Actual
General Fund (199)
As of August 31, 2026

		Adopted Budget	Amended 2025-26	Y-T-D Actual	Balance	Percent of Total
Revenues						
5700	Local Sources	\$ 50,511,930	\$ 49,643,418	\$ 49,528,978	\$ 114,440	99.8%
5800	State Sources	101,422,971	104,378,897	101,236,830	3,142,067	97.0%
5900	Federal Sources	1,375,000	1,879,000	1,879,980	(980)	100.1%
	Total Revenues	\$ 153,309,901	\$ 155,901,315	\$ 152,645,788	\$ 3,255,527	97.9%
Expenditures						
11	Instruction	\$ 82,233,007	\$ 84,452,758	\$ 83,983,963	\$ 468,795	99.4%
12	Instructional resources & media	1,771,816	1,500,728	1,373,946	126,782	91.6%
13	Curriculum & staff development	3,895,773	3,887,015	3,654,263	232,752	94.0%
21	Instructional leadership	2,695,954	2,341,760	2,236,454	105,306	95.5%
23	School leadership	9,571,864	9,470,492	9,312,175	158,317	98.3%
31	Guidance, counseling, & evaluation	6,513,322	6,819,737	6,689,377	130,360	98.1%
32	Social work services	264,611	199,011	188,258	10,753	94.6%
33	Health services	2,266,148	2,392,358	2,340,103	52,255	97.8%
34	Student transportation	6,708,711	6,362,765	5,994,711	368,054	94.2%
35	School Nutrition	-	-	-	-	0.0%
36	Cocurricular/extracurricular	5,704,747	5,777,159	5,568,895	208,264	96.4%
41	General administration	4,292,262	4,211,666	3,992,817	218,849	94.8%
51	Plant maintenance and operations	17,184,660	15,854,672	14,645,532	1,209,140	92.4%
52	Security and monitoring services	3,271,775	3,629,910	3,400,029	229,881	93.7%
53	Data processing services	5,037,698	5,994,091	4,884,453	1,109,638	81.5%
61	Community services	-	-	-	-	0.0%
71	Debt Service	356,810	996,810	308,384	688,426	30.9%
81	Facilities acquisition & construction	-	1,878,137	1,044,540	833,597	55.6%
93	Payments to fiscal agent	-	-	-	-	0.0%
95	Payments to JJAEP	15,743	10,743	-	10,743	0.0%
97	Tax Increment	750,000	490,000	489,092	908	99.8%
99	Intergovernmental Charges	775,000	755,000	751,899	3,101	99.6%
	Total Expenditures	\$ 153,309,901	\$ 157,024,812	\$ 150,858,892	\$ 6,165,920	96.1%
Other Sources & Uses						
	Other sources	-	1,133,767	10,767		
	Other uses	-	-	-		
	Total Other Sources (Uses)	-	1,133,767	10,767		
	Excess (Deficiency) of Revenues over Expenditures	\$ -	10,270	1,797,663		
	Fund Balance (audited), 8-31-2025	\$ 33,606,061	\$ 33,606,061	\$ 33,606,061		
	Fund Balance, Ending	\$ 33,606,061	\$ 33,616,331	\$ 35,403,724		

BELTON ISD
Statement of Unaudited Revenues and Expenditures Budget VS. Actual
Child Nutrition (240)
As of August 31, 2026

		<u>Adopted Budget</u>	<u>Amended 2025-26</u>	<u>Y-T-D Actual</u>	<u>Balance</u>	<u>Percent of Total</u>
Revenues						
5700	Local Sources	\$ 2,605,000	\$ 2,405,000	\$ 2,327,954	\$ 77,046	96.8%
5800	State Sources	35,000	142,075	137,980	4,095	97.1%
5900	Federal Sources	5,600,000	5,600,000	4,302,722	1,297,278	76.8%
	Total Revenues	<u>\$ 8,240,000</u>	<u>\$ 8,147,075</u>	<u>\$ 6,768,655</u>	<u>\$ 1,378,420</u>	<u>83.1%</u>
Expenditures						
35	Food Services, Child Nutrition	\$ 9,471,432	\$ 9,378,507	\$ 8,263,846	\$ 1,114,661	88.1%
	Total Expenditures	<u>\$ 9,471,432</u>	<u>\$ 9,378,507</u>	<u>\$ 8,263,846</u>	<u>\$ 1,114,661</u>	<u>88.1%</u>
Other Sources & Uses						
	Other sources	-	-	-		
	Other uses	-	-	-		
	Total Other Sources (Uses)	<u>-</u>	<u>-</u>	<u>-</u>		
	Excess (Deficiency) of Revenues over Expenditures	(1,231,432)	(1,231,432)	(1,495,190)		
	Fund Balance (audited), 8-31-2025	<u>\$ 3,900,130</u>	<u>\$ 3,900,130</u>	<u>\$ 3,900,130</u>		
	Fund Balance, Ending	<u><u>\$ 2,668,698</u></u>	<u><u>\$ 2,668,698</u></u>	<u><u>\$ 2,404,940</u></u>		

BELTON ISD
Statement of Unaudited Revenues and Expenditures Budget VS. Actual
Debt Service Fund (511)
As of August 31, 2026

		Adopted Budget	Amended 2025-26	Y-T-D Actual	Balance	Percent of Total
Revenues						
5700	Local Sources	\$ 22,479,530	\$ 22,379,530	\$ 22,379,530	\$ -	100.0%
5800	State Sources	3,924,820	3,772,820	3,772,820	-	100.0%
5900	Federal Sources	-	-	-	-	0.0%
	Total Revenues	\$ 26,404,350	\$ 26,152,350	\$ 26,152,350	\$ -	100.0%
Expenditures						
71	Debt Service	\$ 25,233,326	\$ 25,193,197	\$ 25,170,677	\$ 22,520	99.9%
	Total Expenditures	\$ 25,233,326	\$ 25,193,197	\$ 25,170,677	\$ 22,520	99.9%
Other Sources & Uses						
	Other sources	-	12,671,190	12,671,190		
	Other uses	-	(12,757,170)	(12,757,170)		
	Total Other Sources (Uses)	-	(85,981)	(85,981)		
	Excess (Deficiency) of Revenues over Expenditures	1,171,024	873,173	895,693		
	Fund Balance (audited), 8-31-2025	\$ 16,339,981	\$ 16,339,981	\$ 16,339,981		
	Fund Balance, Ending	\$ 17,511,005	\$ 17,213,154	\$ 17,235,674		

BELTON ISD
Bond Project Summary
Bond Fund (622)
As of August 31, 2026

Local	Project	Proposition Budget	Expenditures 8/31/2026	Open Purchase Orders	Available Budget
E12	Elementary #12	\$ 40,064,028	\$ 37,418,971	\$ 26,140	\$ 2,618,917
E13	Elementary #13	\$ 43,567,482	\$ 39,863,493	\$ 11,400	\$ 3,692,589
DPF	Delta Program Facility	\$ 2,500,000	\$ 4,498,146	\$ -	\$ (1,998,146)
SWE	Southwest Elementary Addition	\$ 13,300,000	\$ 15,144,415	\$ 3,130	\$ (1,847,545)
			\$ -		\$ -
MEP	MEP, Roofing and Interior Finishes	\$ 8,942,812	\$ 12,786,758	\$ 318,099	\$ (4,162,045)
			\$ -		\$ -
SAF	Campus Safety + Security Upgrades	\$ 6,041,040	\$ 8,267,705	\$ 253,169	\$ (2,479,834)
			\$ -		\$ -
BHS	BHS Additions & Renovations	\$ 28,524,414	\$ 29,905,522	\$ 78,658	\$ (1,459,766)
			\$ -		\$ -
BNT	BNT Facility Upgrades	\$ 2,000,000	\$ -	\$ -	\$ 2,000,000
			\$ -		\$ -
LND	Land Acquisition	\$ 7,000,897	\$ 7,369,991	\$ -	\$ (369,094)
			\$ -		\$ -
LBM	Fine Arts & Locker Room Addition	\$ 8,582,703	\$ 10,296,362	\$ 8,083	\$ (1,721,741)
			\$ -		\$ -
TEC	Technology Infrastructure	\$ 676,624	\$ -	\$ -	\$ 676,624
			\$ -		\$ -
BUS	New Buses	\$ 5,625,000	\$ 5,472,293	\$ -	\$ 152,707
			\$ -		\$ -
AGR	Agriculture Facility	\$ 2,000,000	\$ 3,831,423	\$ -	\$ (1,831,423)
		<u>\$ 168,825,000</u>	<u>\$ 174,855,079</u>	<u>\$ 698,678</u>	<u>\$ (6,728,756)</u>
DEV	Technology Devices	\$ 5,000,000	\$ 4,999,771	\$ -	\$ 229
		<u>\$ 173,825,000</u>	<u>\$ 179,854,850</u>	<u>\$ 698,678</u>	<u>\$ (6,728,528)</u>
	Investment Earnings (unspent)		\$ 14,968,289		\$ 14,968,289
	Available Funds Remaning				<u>\$ 8,239,761</u>

Belton ISD

Investment Report

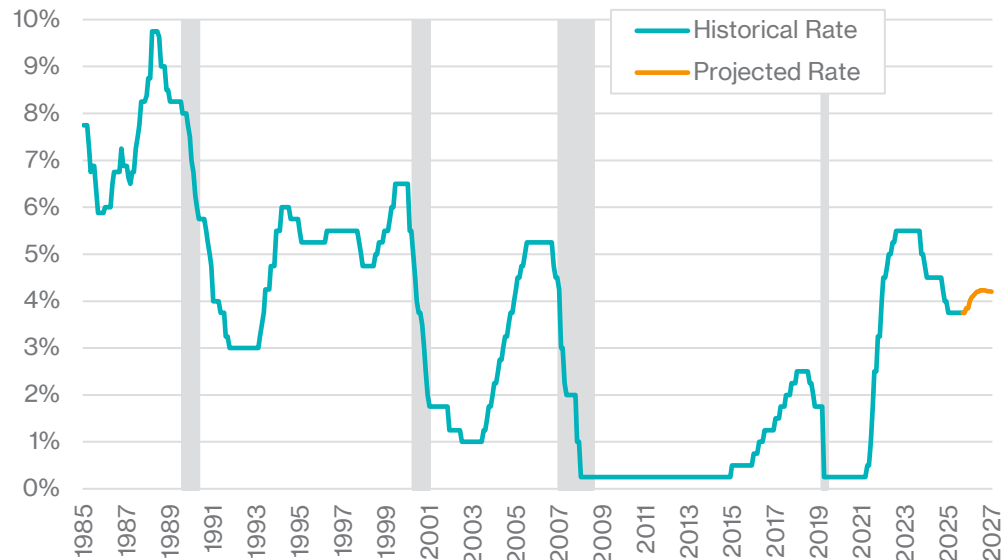
As of August 31, 2026



- Fed Chair Warsh said financial conditions are accommodative, but inflation is too high
- Interest rates across the yield curve were mixed for July and higher year to date
- Labor market data continued its general “no hire, no fire” posture, low unemployment
- The 30-year U.S. Treasury bond hit its highest rate in 19 years on debt/inflation worries

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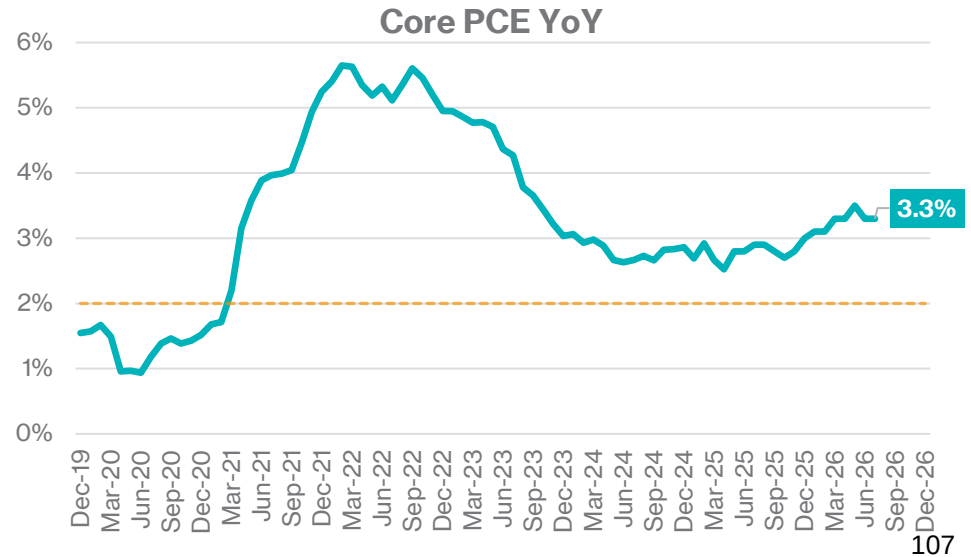
Fed Funds History and Futures' Projection



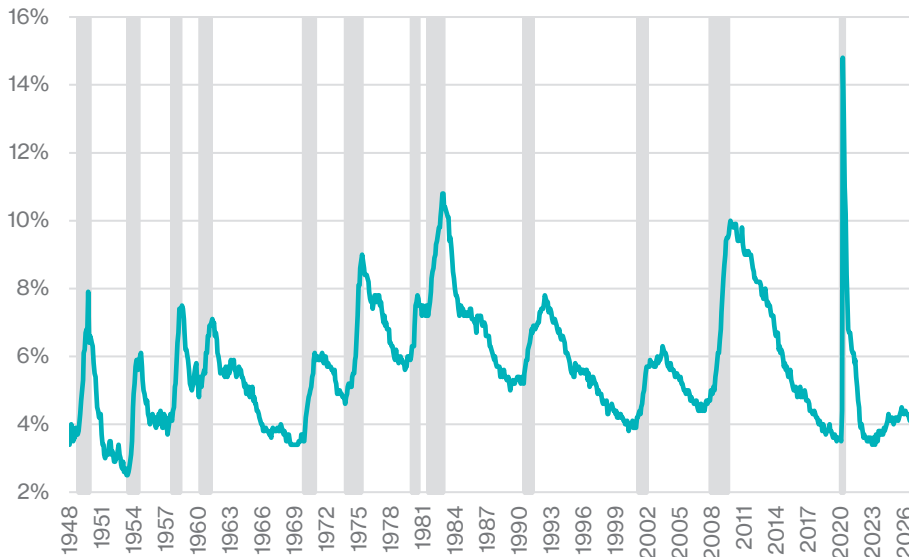
- The Fed has lowered the Fed Funds rate by 1.75% this cycle from 5.5% to 3.75%.
- At the end of August, the futures market was pricing in about two .25% hikes by the end of 2027.
- In contrast, at the end of February (right before the Iran conflict started), the futures market was pricing in about two .25% Fed cuts by the end of 2026.

- Core Personal Consumption Expenditure YoY is the Fed's preferred inflation gauge.
- Core excludes food and energy components.
- It's been above the Fed's 2% target for 64 consecutive months.
- Economists expect Core PCE YoY to remain above the Fed's target for the foreseeable future.

SOURCE: BLOOMBERG



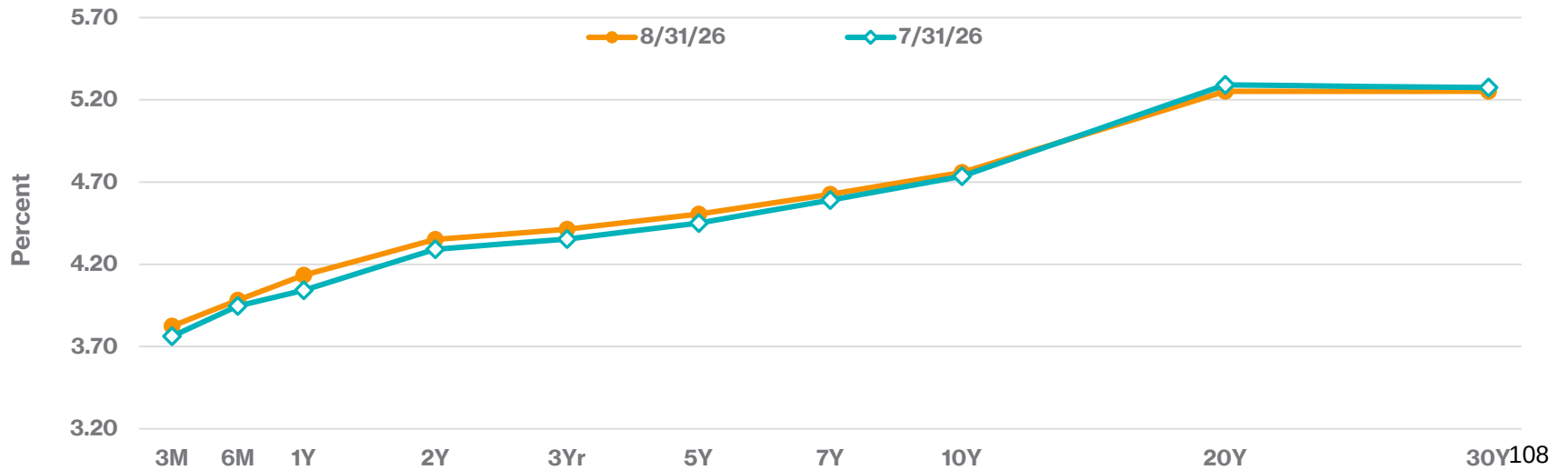
U.S. Unemployment Rate



- The current unemployment rate of 4.1% has declined slightly from earlier this year and remains low by historical standards.
- The Federal Reserve's NAIRU (Non-Accelerating Inflation Rate of Unemployment) is the lowest percentage of unemployment that an economy can have before inflation starts to speed up.
- 4.2% is the median long-run estimate of the NAIRU.

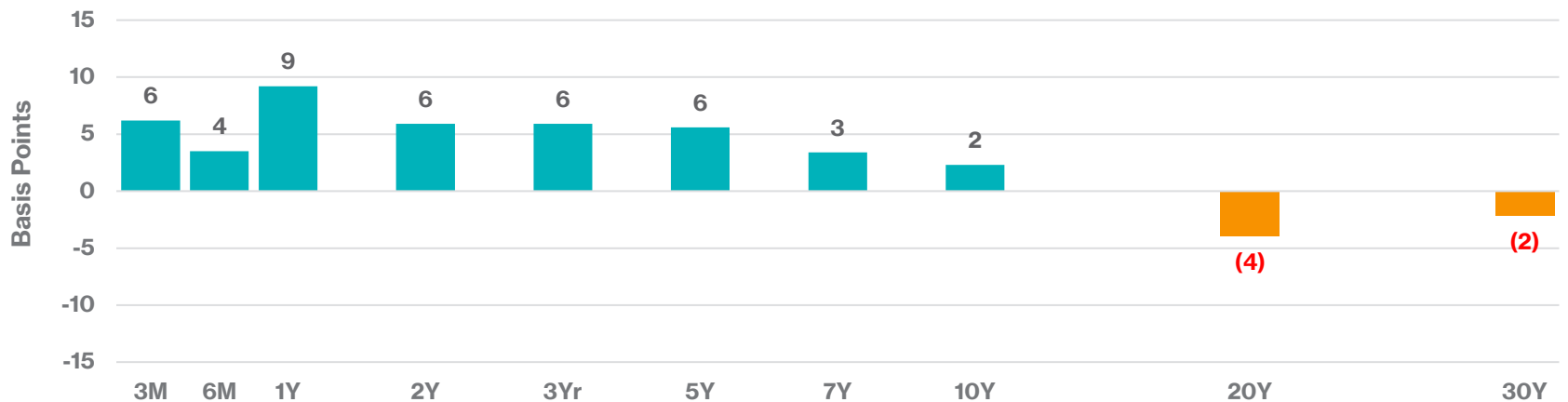
SOURCE: BLOOMBERG, FEDERAL RESERVE

U.S. Treasury Yield Curve Change



SOURCES: BLOOMBERG

Basis Point Change



SOURCES: BLOOMBERG

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Earnings by Fund	17	

Portfolio Summary

3.42

Weighted Average Yield to Maturity

0.00

Weighted Average Maturity (Years)

0.00

Portfolio Effective Duration (Years)

0.00

Weighted Average Life (Years)

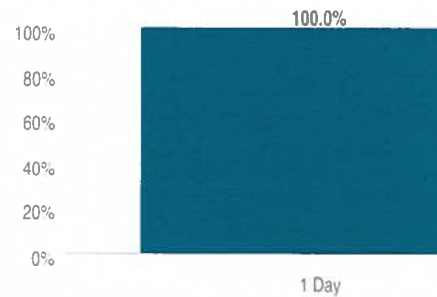
AAA

Average Credit Rating

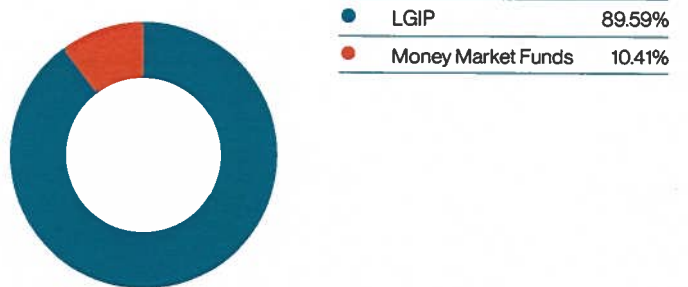
Portfolio Position

Par Value	\$79,589,470
Principal Cost	\$79,589,470
Book Value	\$79,589,470
Market Value	\$79,589,470
Unrealized Gain/Loss	\$0 ₁₁₀
Accrued Interest	\$0

Maturity Distribution



Sector Allocation



Melissa Lafferty
Melissa Lafferty, CFO

Carol Malcik
Carol Malcik, Director of Finance

9.8.26
Date

9.8.26
Date

Portfolio Overview

SECURITY TYPE	PAR VALUE	MARKET VALUE	BOOK VALUE	% OF PORTFOLIO	DAYS TO MATURITY	YIELD
LGIP	71,300,380.22	71,300,380.22	71,300,380.22	89.59%	1	3.82
Money Market Funds	8,289,089.91	8,289,089.91	8,289,089.91	10.41%	1	0.00
TOTAL	79,589,470.13	79,589,470.13	79,589,470.13	100.00%	1	3.42

CASH AND ACCRUED INTEREST						
Purchased Accrued Interest		0.00	0.00			
TOTAL CASH AND INVESTMENTS	79,589,470.13	79,589,470.13	79,589,470.13		1	3.42

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TOTAL EARNINGS		
	CURRENT MONTH	FISCAL YEAR TO DATE
	238,752.92	3,804,155.02

Summary by Type

SECURITY TYPE	# OF SECURITIES	PAR VALUE	BOOK VALUE	% OF PORTFOLIO	YIELD	DAYS TO FINAL MATURITY
2022 BOND FUND						
LGIP	3	8,749,743.62	8,749,743.62	10.99	3.82	1
Money Market Funds	1	385,860.16	385,860.16	0.48	0.00	1
TOTAL	4	9,135,603.78	9,135,603.78	11.48	3.66	1
2026 BOND FUND						
LGIP	1	6,100,889.71	6,100,889.71	7.67	3.86	1
TOTAL	1	6,100,889.71	6,100,889.71	7.67	3.86	1
CONSTRUCTION FUNDS						
Money Market Funds	1	462.00	462.00	0.00	0.00	112
TOTAL	1	462.00	462.00	0.00	0.00	1
DEBT SERVICE FUNDS						
LGIP	3	17,450,394.19	17,450,394.19	21.93	3.85	1
Money Market Funds	1	72,410.59	72,410.59	0.09	0.00	1
TOTAL	4	17,522,804.78	17,522,804.78	22.02	3.83	1
GENERAL FUND						
LGIP	6	38,999,352.70	38,999,352.70	49.00	3.80	1
Money Market Funds	2	7,830,357.16	7,830,357.16	9.84	0.00	1
TOTAL	8	46,829,709.86	46,829,709.86	58.84	3.17	1
GRAND TOTAL	18	79,589,470.13	79,589,470.13	100.00	3.42	1



Position Statement

CUSIP	DESCRIPTION	TRADE DATE SETTLE DATE	PAR VALUE	PRINCIPAL COST PURCHASED INTEREST	TOTAL COST	YIELD TO MATURITY	MATURITY DATE	DAYS TO MATURITY	MARKET PRICE MARKET VALUE	UNREALIZED GAIN/LOSS BOOK VALUE	% OF MV	MOODY'S S&P RATING
2022 BOND FUND												
LGIP												
LSCOP	Lone Star Invest Pool - Corp Overnight Plus Fund	08/31/2026 08/31/2026	3,286,123.47	3,286,123.47 0.00	3,286,123.47	3.89		1	1.00 3,286,123.47	0.00 3,286,123.47	4.13	AAA
TEXSTAR	TexSTAR	08/31/2026 08/31/2026	2,392,159.89	2,392,159.89 0.00	2,392,159.89	3.69		1	1.00 2,392,159.89	0.00 2,392,159.89	3.01	AAA
TXCLASS	Texas CLASS	08/31/2026 08/31/2026	3,071,460.26	3,071,460.26 0.00	3,071,460.26	3.86		1	1.00 3,071,460.26	0.00 3,071,460.26	3.86	AAA
LGIP TOTAL			8,749,743.62	8,749,743.62 0.00	8,749,743.62	3.82		1	1.00 8,749,743.62	0.00 8,749,743.62	10.99	AAA
MONEY MARKET FUNDS												
46-8635-0176	PNC Government Checking Account	08/31/2026 08/31/2026	385,860.16	385,860.16 0.00	385,860.16	0.00		1	1.00 385,860.16	0.00 385,860.16	0.48	113 NA NA
MONEY MARKET FUNDS TOTAL			385,860.16	385,860.16 0.00	385,860.16	0.00		1	1.00 385,860.16	0.00 385,860.16	0.48	NA
2022 BOND FUND TOTAL			9,135,603.78	9,135,603.78 0.00	9,135,603.78	3.66		1	0.00 9,135,603.78	0.00 9,135,603.78	11.48	AAA
2026 BOND FUND												
LGIP												
TXCLASS	Texas CLASS	08/31/2026 08/31/2026	6,100,889.71	6,100,889.71 0.00	6,100,889.71	3.86		1	1.00 6,100,889.71	0.00 6,100,889.71	7.67	AAA
LGIP TOTAL			6,100,889.71	6,100,889.71 0.00	6,100,889.71	3.86		1	1.00 6,100,889.71	0.00 6,100,889.71	7.67	AAA
2026 BOND FUND TOTAL			6,100,889.71	6,100,889.71 0.00	6,100,889.71	3.86		1	0.00 6,100,889.71	0.00 6,100,889.71	7.67	AAA
CONSTRUCTION FUNDS												
MONEY MARKET FUNDS												
49-4234-4745	PNC Corporate Busi- ness Account	08/31/2026 08/31/2026	462.00	462.00 0.00	462.00	0.00		1	1.00 462.00	0.00 462.00	0.00	NA NA
MONEY MARKET FUNDS TOTAL			462.00	462.00 0.00	462.00	0.00		1	1.00 462.00	0.00 462.00	0.00	NA
CONSTRUCTION FUNDS TOTAL			462.00	462.00 0.00	462.00	0.00		1	0.00 462.00	0.00 462.00	0.00	NA



Position Statement

CUSIP	DESCRIPTION	TRADE DATE SETTLE DATE	PAR VALUE	PRINCIPAL COST PURCHASED INTEREST	TOTAL COST	YIELD TO MATURITY	MATURITY DATE	DAYS TO MATURITY	MARKET PRICE MARKET VALUE	UNREALIZED GAIN/LOSS BOOK VALUE	% OF MV	MOODY'S S&P RATING
DEBT SERVICE FUNDS												
LGIP												
TEXSTAR	TexSTAR	08/31/2026 08/31/2026	2,542,547.34	2,542,547.34 0.00	2,542,547.34	3.69		1	1.00 2,542,547.34	0.00 2,542,547.34	3.19	AAA
TEXPRIME	TexPool Prime	08/31/2026 08/31/2026	6,363,655.50	6,363,655.50 0.00	6,363,655.50	3.85		1	1.00 6,363,655.50	0.00 6,363,655.50	8.00	AAA
LSCOP	Lone Star Invest Pool - Corp Overnight Plus Fund	08/31/2026 08/31/2026	8,544,191.35	8,544,191.35 0.00	8,544,191.35	3.89		1	1.00 8,544,191.35	0.00 8,544,191.35	10.74	AAA
LGIP TOTAL			17,450,394.19	17,450,394.19 0.00	17,450,394.19	3.85		1	1.00 17,450,394.19	0.00 17,450,394.19	21.93	AAA 114
MONEY MARKET FUNDS												
49-4026-8128	PNC Corporate Busi- ness Account	08/31/2026 08/31/2026	72,410.59	72,410.59 0.00	72,410.59	0.00		1	1.00 72,410.59	0.00 72,410.59	0.09	NA NA
MONEY MARKET FUNDS TOTAL			72,410.59	72,410.59 0.00	72,410.59	0.00		1	1.00 72,410.59	0.00 72,410.59	0.09	NA
DEBT SERVICE FUNDS TOTAL			17,522,804.78	17,522,804.78 0.00	17,522,804.78	3.83		1	1.00 17,522,804.78	0.00 17,522,804.78	22.02	AAA

GENERAL FUND

LGIP												
TEXSTAR	TexSTAR	08/31/2026 08/31/2026	8,646,709.42	8,646,709.42 0.00	8,646,709.42	3.69		1	1.00 8,646,709.42	0.00 8,646,709.42	10.86	AAA
TXCLASS	Texas CLASS	08/31/2026 08/31/2026	1.03	1.03 0.00	1.03	3.82		1	1.00 1.03	0.00 1.03	0.00	AAA
LSGO	Lone Star Invest Pool - Government Overnight	08/31/2026 08/31/2026	74.86	74.86 0.00	74.86	3.67		1	1.00 74.86	0.00 74.86	0.00	AAA
TEXPRIME	TexPool Prime	08/31/2026 08/31/2026	1,400,198.31	1,400,198.31 0.00	1,400,198.31	3.85		1	1.00 1,400,198.31	0.00 1,400,198.31	1.76	AAA
LSCOP	Lone Star Invest Pool - Corp Overnight Plus Fund	08/31/2026 08/31/2026	20,631,868.37	20,631,868.37 0.00	20,631,868.37	3.89		1	1.00 20,631,868.37	0.00 20,631,868.37	25.92	AAA
TEXPOOL	TexPool	08/31/2026 08/31/2026	8,320,500.71	8,320,500.71 0.00	8,320,500.71	3.70		1	1.00 8,320,500.71	0.00 8,320,500.71	10.45	AAA



Position Statement

CUSIP	DESCRIPTION	TRADE DATE SETTLE DATE	PAR VALUE	PRINCIPAL COST PURCHASED INTEREST	TOTAL COST	YIELD TO MATURITY	MATURITY DATE	DAYS TO MATURITY	MARKET PRICE MARKET VALUE	UNREALIZED GAIN/LOSS BOOK VALUE	% OF MV	MOODY'S S&P RATING
LGIP TOTAL			38,999,352.70	38,999,352.70 0.00	38,999,352.70	3.80		1	1.00 38,999,352.70	0.00 38,999,352.70	49.00	AAA
MONEY MARKET FUNDS												
49-4026-8136	PNC Corporate Business Account	08/31/2026 08/31/2026	4,447,111.67	4,447,111.67 0.00	4,447,111.67	0.00		1	1.00 4,447,111.67	0.00 4,447,111.67	5.59	NA NA
49-4026-8101	PNC Corporate Business Account	08/31/2026 08/31/2026	3,383,245.49	3,383,245.49 0.00	3,383,245.49	0.00		1	1.00 3,383,245.49	0.00 3,383,245.49	4.25	NA NA
MONEY MARKET FUNDS TOTAL			7,830,357.16	7,830,357.16 0.00	7,830,357.16	0.00		1	1.00 7,830,357.16	0.00 7,830,357.16	9.84	NA
GENERAL FUND TOTAL			46,829,709.86	46,829,709.86 0.00	46,829,709.86	3.17		1	46,829,709.86	0.00 46,829,709.86	58.84	AAA
GRAND TOTAL			79,589,470.13	79,589,470.13 0.00	79,589,470.13	3.42		1	79,589,470.13	0.00 79,589,470.13	100.00	115 AAA

Cash Reconciliation Report

Transaction Statement

NO ACTIVITY DURING
CURRENT PERIOD

Amortization Schedule

CUSIP	DESCRIPTION	PAR VALUE	PRINCIPAL COST	ORIGINAL PREMIUM OR DISCOUNT	BEGINNING BOOK VALUE	CURRENT PERIOD AMORT	ENDING BOOK VALUE	TOTAL AMORTIZATION	UNAMORTIZED BALANCE
GRAND TOTAL		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00



Accrued Interest Schedule

IDENTIFIER	DESCRIPTION	SETTLE DATE	PAR VALUE	PRINCIPAL COST	BEGINNING ACCRUED INTEREST	PURCHASED INTEREST	CURRENT PERIOD ACCRUAL	INTEREST RECEIVED	ENDING ACCRUED INTEREST
2022 BOND FUND									
LSCOP	Lone Star Invest Pool - Corp Overnight Plus Fund	2026-08-31	3,286,123.47	3,286,123.47	0.00	0.00	10,745.95	10,745.95	0.00
46-8635-0176	PNC Government Checking Account	2026-08-31	385,860.16	385,860.16	0.00	0.00	0.00	0.00	0.00
TEXSTAR	TexSTAR	2026-08-31	2,392,159.89	2,392,159.89	0.00	0.00	8,240.83	8,240.83	0.00
TXCLASS	Texas CLASS	2026-08-31	3,071,460.26	3,071,460.26	0.00	0.00	13,758.70	13,758.70	0.00
TOTAL			9,135,603.78	9,135,603.78	0.00	0.00	32,745.48	32,745.48	0.00
2026 BOND FUND									
TXCLASS	Texas CLASS	2026-08-31	6,100,889.71	6,100,889.71	0.00	0.00	19,834.86	19,834.86	0.00
TOTAL			6,100,889.71	6,100,889.71	0.00	0.00	19,834.86	19,834.86	19.83
CONSTRUCTION FUNDS									
49-4234-4745	PNC Corporate Business Account	2026-08-31	462.00	462.00	0.00	0.00	0.00	0.00	0.00
TOTAL			462.00	462.00	0.00	0.00	0.00	0.00	0.00
DEBT SERVICE FUNDS									
LSCOP	Lone Star Invest Pool - Corp Overnight Plus Fund	2026-08-31	8,544,191.35	8,544,191.35	0.00	0.00	27,940.36	27,940.36	0.00
49-4026-8128	PNC Corporate Business Account	2026-08-31	72,410.59	72,410.59	0.00	0.00	0.00	0.00	0.00
TEXPRIME	TexPool Prime	2026-08-31	6,363,655.50	6,363,655.50	0.00	0.00	24,274.32	24,274.32	0.00
TEXSTAR	TexSTAR	2026-08-31	2,542,547.34	2,542,547.34	0.00	0.00	7,868.96	7,868.96	0.00
TOTAL			17,522,804.78	17,522,804.78	0.00	0.00	60,083.64	60,083.64	0.00
GENERAL FUND									
LSCOP	Lone Star Invest Pool - Corp Overnight Plus Fund	2026-08-31	20,631,868.37	20,631,868.37	0.00	0.00	67,424.63	67,424.63	0.00
LSGO	Lone Star Invest Pool - Government Overnight	2026-08-31	74.86	74.86	0.00	0.00	0.23	0.23	0.00
49-4026-8136	PNC Corporate Business Account	2026-08-31	4,447,111.67	4,447,111.67	0.00	0.00	0.00	0.00	0.00
49-4026-8101	PNC Corporate Business Account	2026-08-31	3,383,245.49	3,383,245.49	0.00	0.00	0.00	0.00	0.00
TEXPOOL	TexPool	2026-08-31	8,320,500.71	8,320,500.71	0.00	0.00	26,892.19	26,892.19	0.00

Accrued Interest Schedule

IDENTIFIER	DESCRIPTION	SETTLE DATE	PAR VALUE	PRINCIPAL COST	BEGINNING ACCRUED INTEREST	PURCHASED INTEREST	CURRENT PERIOD ACCRUAL	INTEREST RECEIVED	ENDING ACCRUED INTEREST
TEXPRIME	TexPool Prime	2026-08-31	1,400,198.31	1,400,198.31	0.00	0.00	4,532.12	4,532.12	0.00
TEXSTAR	TexSTAR	2026-08-31	8,646,709.42	8,646,709.42	0.00	0.00	27,239.77	27,239.77	0.00
TXCLASS	Texas CLASS	2026-08-31	1.03	1.03	0.00	0.00	0.00	0.00	0.00
TOTAL			46,829,709.86	46,829,709.86	0.00	0.00	126,088.94	126,088.94	0.00
GRAND TOTAL			79,589,470.13	79,589,470.13	0.00	0.00	238,752.92	238,752.92	0.00



Earnings by Fund

CUSIP	DESCRIPTION	ENDING PAR VALUE	BEGINNING BOOK VALUE	ENDING BOOK VALUE	FINAL MATURITY	COUPON RATE	YIELD	INTEREST EARNED	NET AMORTIZATION/ACCRETION INCOME	NET REALIZED GAIN/LOSS	ADJUSTED INTEREST EARNINGS
2022 BOND FUND											
46-8635-0176	PNC Government Checking Account	385,860.16	336,172.91	385,860.16	08/31/2026	0.00	0.00	0.00	0.00	0.00	0.00
LSCOP	Lone Star Invest Pool - Corp Overnight Plus Fund	3,286,123.47	3,275,377.52	3,286,123.47	08/31/2026	0.00	3.89	10,745.95	0.00	0.00	10,745.95
TEXSTAR	TexSTAR	2,392,159.89	3,983,919.06	2,392,159.89	08/31/2026	5.30	3.69	8,240.83	0.00	0.00	8,240.83
TXCLASS	Texas CLASS	3,071,460.26	4,557,701.56	3,071,460.26	08/31/2026	0.00	3.86	13,758.70	0.00	0.00	13,758.70
TOTAL		9,135,603.78	12,153,171.05	9,135,603.78		1.39	3.66	32,745.48	0.00	0.00	32,745.48
2026 BOND FUND											
TXCLASS	Texas CLASS	6,100,889.71	6,081,054.85	6,100,889.71	08/31/2026	0.00	3.86	19,834.86	0.00	0.00	19,834.86
TOTAL		6,100,889.71	6,081,054.85	6,100,889.71		0.00	3.86	19,834.86	0.00	0.00	19,834.86
CONSTRUCTION FUNDS											
49-4234-4745	PNC Corporate Business Account	462.00	458.00	462.00	08/31/2026	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL		462.00	458.00	462.00		0.00	0.00	0.00	0.00	0.00	0.00
DEBT SERVICE FUNDS											
49-4026-8128	PNC Corporate Business Account	72,410.59	29,241.84	72,410.59	08/31/2026	0.00	0.00	0.00	0.00	0.00	0.00
LSCOP	Lone Star Invest Pool - Corp Overnight Plus Fund	8,544,191.35	8,516,250.99	8,544,191.35	08/31/2026	0.00	3.89	27,940.36	0.00	0.00	27,940.36
TEXPRIME	TexPool Prime	6,363,655.50	13,487,847.84	6,363,655.50	08/31/2026	4.50	3.85	24,274.32	0.00	0.00	24,274.32
TEXSTAR	TexSTAR	2,542,547.34	2,534,678.38	2,542,547.34	08/31/2026	5.30	3.69	7,868.96	0.00	0.00	7,868.96
TOTAL		17,522,804.78	24,568,019.05	17,522,804.78		2.40	3.83	60,083.64	0.00	0.00	60,083.64
GENERAL FUND											
49-4026-8101	PNC Corporate Business Account	3,383,245.49	787,838.96	3,383,245.49	08/31/2026	0.00	0.00	0.00	0.00	0.00	0.00
49-4026-8136	PNC Corporate Business Account	4,447,111.67	1,148,086.77	4,447,111.67	08/31/2026	0.00	0.00	0.00	0.00	0.00	0.00
LSCOP	Lone Star Invest Pool - Corp Overnight Plus Fund	20,631,868.37	23,885,021.93	20,631,868.37	08/31/2026	0.00	3.89	67,424.63	0.00	0.00	67,424.63
LSGO	Lone Star Invest Pool - Government Overnight	74.86	74.63	74.86	08/31/2026	0.00	3.67	0.23	0.00	0.00	0.23

Earnings by Fund

CUSIP	DESCRIPTION	ENDING PAR VALUE	BEGINNING BOOK VALUE	ENDING BOOK VALUE	FINAL MATURITY	COUPON RATE	YIELD	INTEREST EARNED	NET AMORTIZATION/ ACCRETION INCOME	NET REALIZED GAIN/LOSS	ADJUSTED INTEREST EARNINGS
TEXPOOL	TexPool	8,320,500.71	8,678,504.57	8,320,500.71	08/31/2026	5.34	3.70	26,892.19	0.00	0.00	26,892.19
TEXPRIME	TexPool Prime	1,400,198.31	1,395,666.19	1,400,198.31	08/31/2026	4.50	3.85	4,532.12	0.00	0.00	4,532.12
TEXSTAR	TexSTAR	8,646,709.42	9,419,469.65	8,646,709.42	08/31/2026	5.30	3.69	27,239.77	0.00	0.00	27,239.77
TXCLASS	Texas CLASS	1.03	1.03	1.03	08/31/2026	0.00	3.82	0.00	0.00	0.00	0.00
TOTAL		46,829,709.86	45,314,663.73	46,829,709.86		2.06	3.17	126,088.94	0.00	0.00	126,088.94
GRAND TOTAL		79,589,470.13	88,117,366.68	79,589,470.13		1.90	3.42	238,752.92	0.00	0.00	238,752.92

Disclosure

Meeder provides monthly statements for its investment management clients to provide information about the investment portfolio. The information should not be used for audit or confirmation purposes. Please review your custodial statements and report any inaccuracies or discrepancies.

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BELTON ISD

Quarterly Investment Report

AS OF AUGUST 31, 2026



MEEDER

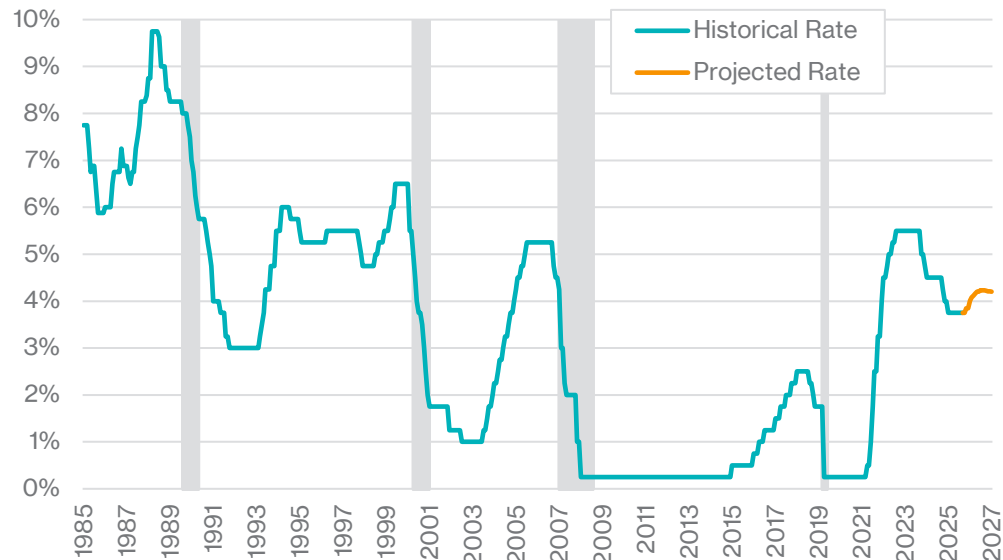
PUBLIC FUNDS



- Fed Chair Warsh said financial conditions are accommodative, but inflation is too high
- Interest rates across the yield curve were mixed for July and higher year to date
- Labor market data continued its general “no hire, no fire” posture, low unemployment
- The 30-year U.S. Treasury bond hit its highest rate in 19 years on debt/inflation worries

125

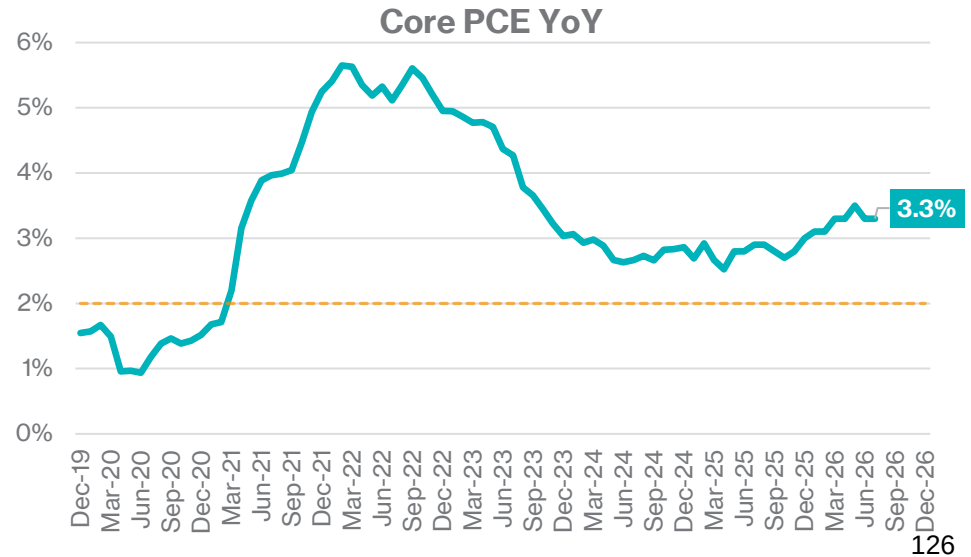
Fed Funds History and Futures' Projection



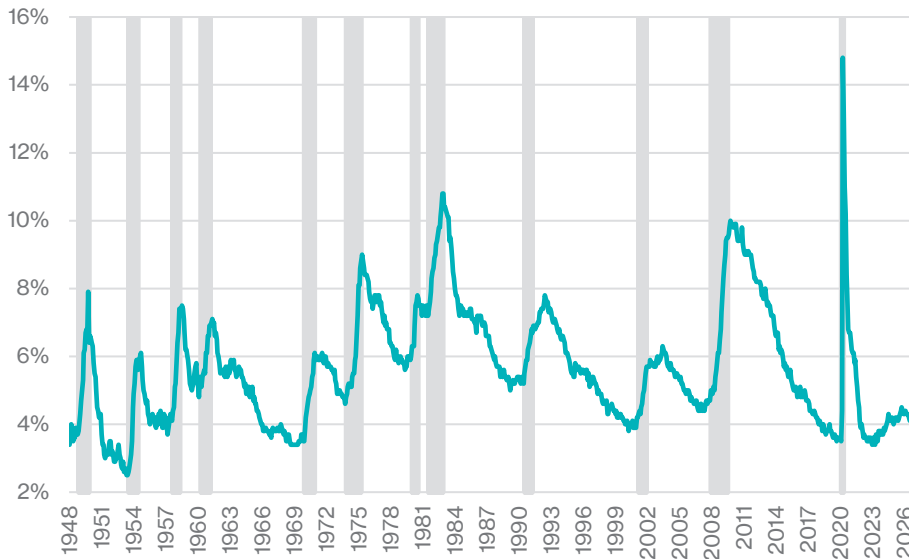
- The Fed has lowered the Fed Funds rate by 1.75% this cycle from 5.5% to 3.75%.
- At the end of August, the futures market was pricing in about two .25% hikes by the end of 2027.
- In contrast, at the end of February (right before the Iran conflict started), the futures market was pricing in about two .25% Fed cuts by the end of 2026.

- Core Personal Consumption Expenditure YoY is the Fed's preferred inflation gauge.
- Core excludes food and energy components.
- It's been above the Fed's 2% target for 64 consecutive months.
- Economists expect Core PCE YoY to remain above the Fed's target for the foreseeable future.

SOURCE: BLOOMBERG



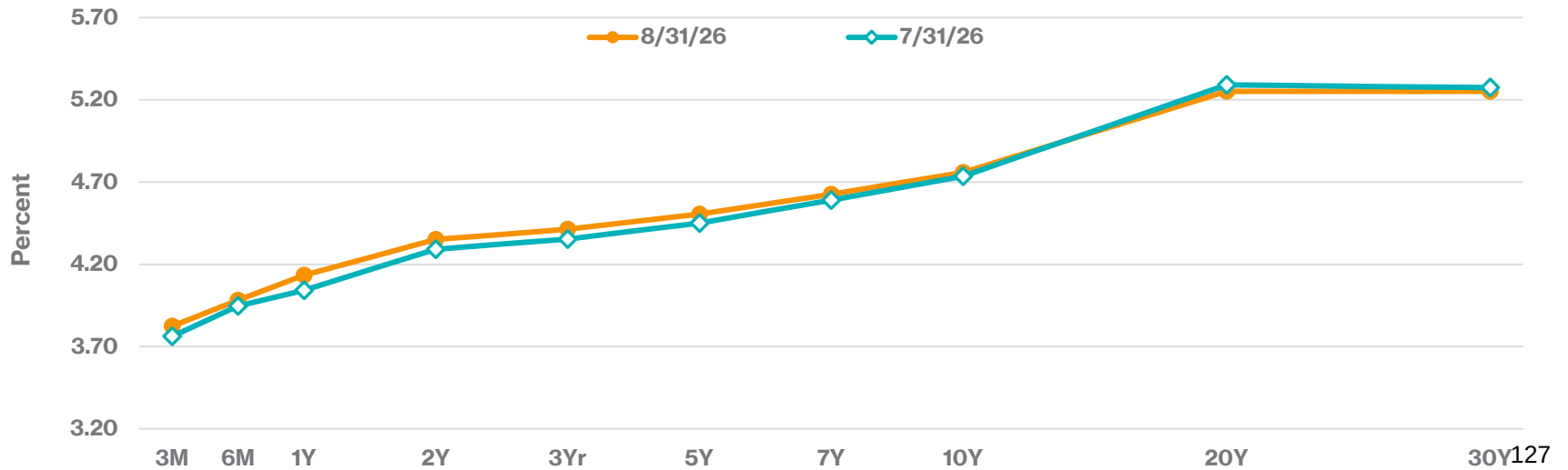
U.S. Unemployment Rate



- The current unemployment rate of 4.1% has declined slightly from earlier this year and remains low by historical standards.
- The Federal Reserve's NAIRU (Non-Accelerating Inflation Rate of Unemployment) is the lowest percentage of unemployment that an economy can have before inflation starts to speed up.
- 4.2% is the median long-run estimate of the NAIRU.

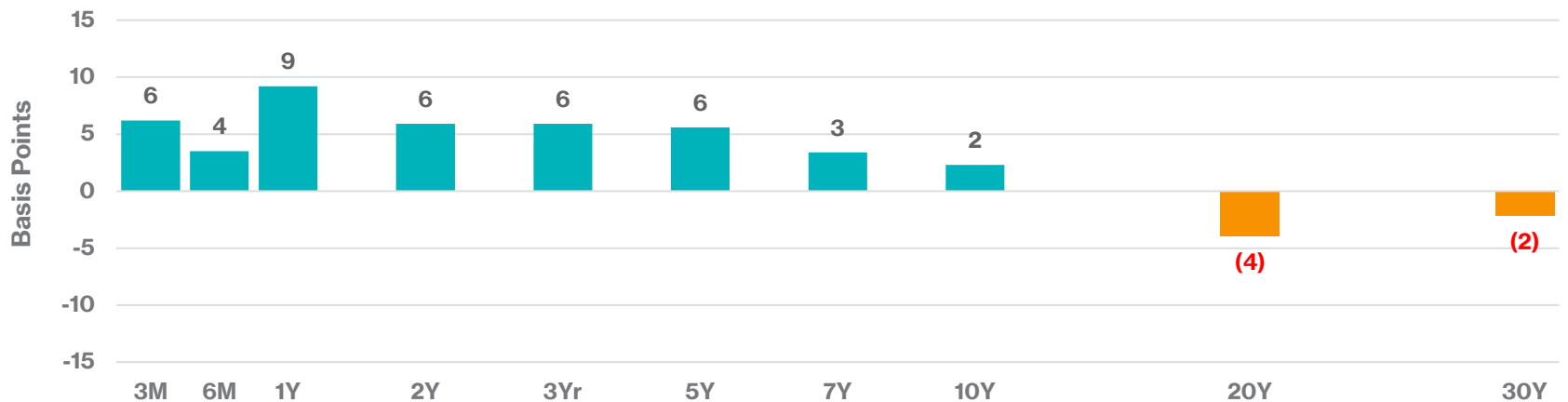
SOURCE: BLOOMBERG, FEDERAL RESERVE

U.S. Treasury Yield Curve Change



SOURCES: BLOOMBERG

Basis Point Change



SOURCES: BLOOMBERG

Compliance Certification

The undersigned acknowledge they have reviewed this quarterly investment report for the period ending August 31, 2026. Officials designated as investment officers by this entity's Investment Policy attest that all investments comply with the Texas Public Funds Investment Act and this entity's Investment Policy.



Melissa Lafferty, CFO



Carol Malcik, Director of Finance

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Portfolio Statistics

3.42

Weighted Average Yield to Maturity

0.00

Weighted Average Maturity (Years)

0.00

Portfolio Effective Duration (Years)

0.00

Weighted Average Life (Years)

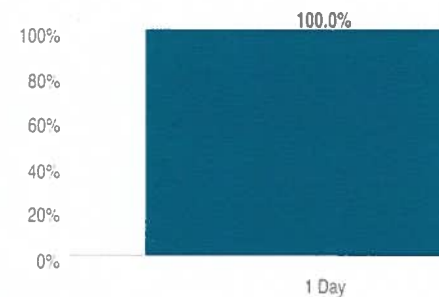
AAA

Average Credit Rating

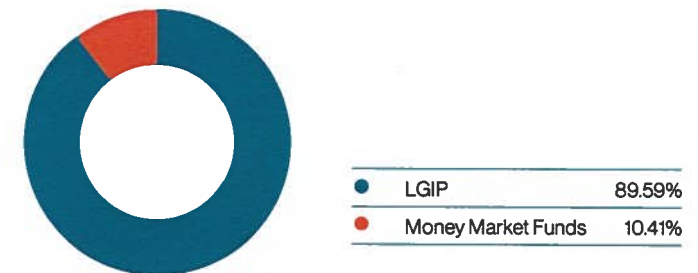
Portfolio Position

Par Value	\$79,589,470
Principal Cost	\$79,589,470
Book Value	\$79,589,470
Market Value	\$79,589,470
Unrealized Gain/Loss	\$0 ₁₃₀
Accrued Interest	\$0

Maturity Distribution



Sector Allocation



Melissa Lafferty
Melissa Lafferty, CFO

Carol Malcik
Carol Malcik, Director of Finance

9.8.26
Date

9.8.26
Date

Quarterly Portfolio Summary

This quarterly report is prepared in compliance with the Investment Policy and the Strategy of this entity and the Public Funds Investment Act (Chapter 2256, Texas Government Code).

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Portfolio as of May 31, 2026

BEGINNING BOOK VALUE	\$90,463,009.12
BEGINNING MARKET VALUE	\$90,463,009.12
UNREALIZED GAIN/(LOSS)	\$0.00
WEIGHTED AVERAGE MATURITY (YEARS)	0.00
WEIGHTED AVERAGE YIELD	3.52

Portfolio as of August 31, 2026

ENDING BOOK VALUE	\$79,589,470.13
ENDING MARKET VALUE	\$79,589,470.13
INVESTMENT INCOME FOR THE PERIOD	\$760,476.40
UNREALIZED GAIN/(LOSS)	\$0.00
CHANGE IN UNREALIZED GAIN/(LOSS)	\$0.00
WEIGHTED AVERAGE MATURITY (YEARS)	0.00
WEIGHTED AVERAGE YIELD	3.42

Quarterly Portfolio Summary By Fund

PORTFOLIO MARKET VALUE BY FUND	05/31/2026	08/31/2026	CHANGE	INTEREST EARNED
2022 BOND FUND	14,275,668.52	9,135,603.78	-5,140,064.74	115,710.14
2026 BOND FUND	6,042,823.35	6,100,889.71	58,066.36	58,066.36
CONSTRUCTION FUNDS	434.00	462.00	28.00	0.00
DEBT SERVICE FUNDS	24,308,200.35	17,522,804.78	-6,785,395.57	214,466.51
GENERAL FUND	45,835,882.90	46,829,709.86	993,826.96	372,233.39
TOTAL	90,463,009.12	79,589,470.13	-10,873,538.99	760,476.40

Portfolio Overview

SECURITY TYPE	PAR VALUE	MARKET VALUE	BOOK VALUE	% OF PORTFOLIO	DAYS TO MATURITY	YIELD
LGIP	71,300,380.22	71,300,380.22	71,300,380.22	89.59%	1	3.82
Money Market Funds	8,289,089.91	8,289,089.91	8,289,089.91	10.41%	1	0.00
TOTAL	79,589,470.13	79,589,470.13	79,589,470.13	100.00%	1	3.42

CASH AND ACCRUED INTEREST						
Purchased Accrued Interest		0.00	0.00			
TOTAL CASH AND INVESTMENTS	79,589,470.13	79,589,470.13	79,589,470.13		1	3.42
						133

TOTAL EARNINGS		
	CURRENT QUARTER	FISCAL YEAR TO DATE
	760,476.40	3,804,155.02



Summary by Type

SECURITY TYPE	# OF SECURITIES	PAR VALUE	BOOK VALUE	% OF PORTFOLIO	YIELD	DAYS TO FINAL MATURITY
2022 BOND FUND						
LGIP	3	8,749,743.62	8,749,743.62	10.99	3.82	1
Money Market Funds	1	385,860.16	385,860.16	0.48	0.00	1
TOTAL	4	9,135,603.78	9,135,603.78	11.48	3.66	1
2026 BOND FUND						
LGIP	1	6,100,889.71	6,100,889.71	7.67	3.86	1
TOTAL	1	6,100,889.71	6,100,889.71	7.67	3.86	1
CONSTRUCTION FUNDS						
Money Market Funds	1	462.00	462.00	0.00	0.00	134 ₁
TOTAL	1	462.00	462.00	0.00	0.00	1
DEBT SERVICE FUNDS						
LGIP	3	17,450,394.19	17,450,394.19	21.93	3.85	1
Money Market Funds	1	72,410.59	72,410.59	0.09	0.00	1
TOTAL	4	17,522,804.78	17,522,804.78	22.02	3.83	1
GENERAL FUND						
LGIP	6	38,999,352.70	38,999,352.70	49.00	3.80	1
Money Market Funds	2	7,830,357.16	7,830,357.16	9.84	0.00	1
TOTAL	8	46,829,709.86	46,829,709.86	58.84	3.17	1
GRAND TOTAL	18	79,589,470.13	79,589,470.13	100.00	3.42	1



Position Statement

CUSIP	DESCRIPTION	TRADE DATE SETTLE DATE	PAR VALUE	PRINCIPAL COST PURCHASED INTEREST	TOTAL COST	YIELD TO MATURITY	MATURITY DATE	DAYS TO MATURITY	MARKET PRICE MARKET VALUE	UNREALIZED GAIN/LOSS BOOK VALUE	% OF MV	MOODY'S S&P RATING
2022 BOND FUND												
LGIP												
LSCOP	Lone Star Invest Pool - Corp Overnight Plus Fund	08/31/2026 08/31/2026	3,286,123.47	3,286,123.47 0.00	3,286,123.47	3.89		1	1.00 3,286,123.47	0.00 3,286,123.47	4.13	AAA
TEXSTAR	TexSTAR	08/31/2026 08/31/2026	2,392,159.89	2,392,159.89 0.00	2,392,159.89	3.69		1	1.00 2,392,159.89	0.00 2,392,159.89	3.01	AAA
TXCLASS	Texas CLASS	08/31/2026 08/31/2026	3,071,460.26	3,071,460.26 0.00	3,071,460.26	3.86		1	1.00 3,071,460.26	0.00 3,071,460.26	3.86	AAA
LGIP TOTAL			8,749,743.62	8,749,743.62 0.00	8,749,743.62	3.82		1	1.00 8,749,743.62	0.00 8,749,743.62	10.99	AAA
MONEY MARKET FUNDS												
46-8635-0176	PNC Government Checking Account	08/31/2026 08/31/2026	385,860.16	385,860.16 0.00	385,860.16	0.00		1	1.00 385,860.16	0.00 385,860.16	0.48	135A NA
MONEY MARKET FUNDS TOTAL			385,860.16	385,860.16 0.00	385,860.16	0.00		1	1.00 385,860.16	0.00 385,860.16	0.48	NA
2022 BOND FUND TOTAL			9,135,603.78	9,135,603.78 0.00	9,135,603.78	3.66		1	9,135,603.78	0.00 9,135,603.78	11.48	AAA
2026 BOND FUND												
LGIP												
TXCLASS	Texas CLASS	08/31/2026 08/31/2026	6,100,889.71	6,100,889.71 0.00	6,100,889.71	3.86		1	1.00 6,100,889.71	0.00 6,100,889.71	7.67	AAA
LGIP TOTAL			6,100,889.71	6,100,889.71 0.00	6,100,889.71	3.86		1	1.00 6,100,889.71	0.00 6,100,889.71	7.67	AAA
2026 BOND FUND TOTAL			6,100,889.71	6,100,889.71 0.00	6,100,889.71	3.86		1	6,100,889.71	0.00 6,100,889.71	7.67	AAA
CONSTRUCTION FUNDS												
MONEY MARKET FUNDS												
49-4234-4745	PNC Corporate Busi- ness Account	08/31/2026 08/31/2026	462.00	462.00 0.00	462.00	0.00		1	1.00 462.00	0.00 462.00	0.00	NA NA
MONEY MARKET FUNDS TOTAL			462.00	462.00 0.00	462.00	0.00		1	1.00 462.00	0.00 462.00	0.00	NA
CONSTRUCTION FUNDS TOTAL			462.00	462.00 0.00	462.00	0.00		1	462.00	0.00 462.00	0.00	NA



Position Statement

CUSIP	DESCRIPTION	TRADE DATE SETTLE DATE	PAR VALUE	PRINCIPAL COST PURCHASED INTEREST	TOTAL COST	YIELD TO MATURITY	MATURITY DATE	DAYS TO MATURITY	MARKET PRICE MARKET VALUE	UNREALIZED GAIN/LOSS BOOK VALUE	% OF MV	MOODY'S S&P RATING
DEBT SERVICE FUNDS												
LGIP												
TEXSTAR	TexSTAR	08/31/2026 08/31/2026	2,542,547.34	2,542,547.34 0.00	2,542,547.34	3.69		1	1.00 2,542,547.34	0.00 2,542,547.34	3.19	AAA
TEXPRIME	TexPool Prime	08/31/2026 08/31/2026	6,363,655.50	6,363,655.50 0.00	6,363,655.50	3.85		1	1.00 6,363,655.50	0.00 6,363,655.50	8.00	AAA
LSCOP	Lone Star Invest Pool - Corp Overnight Plus Fund	08/31/2026 08/31/2026	8,544,191.35	8,544,191.35 0.00	8,544,191.35	3.89		1	1.00 8,544,191.35	0.00 8,544,191.35	10.74	AAA
LGIP TOTAL			17,450,394.19	17,450,394.19 0.00	17,450,394.19	3.85		1	1.00 17,450,394.19	0.00 17,450,394.19	21.93	AAA
MONEY MARKET FUNDS												136
49-4026-8128	PNC Corporate Business Account	08/31/2026 08/31/2026	72,410.59	72,410.59 0.00	72,410.59	0.00		1	1.00 72,410.59	0.00 72,410.59	0.09	NA NA
MONEY MARKET FUNDS TOTAL			72,410.59	72,410.59 0.00	72,410.59	0.00		1	1.00 72,410.59	0.00 72,410.59	0.09	NA
DEBT SERVICE FUNDS TOTAL			17,522,804.78	17,522,804.78 0.00	17,522,804.78	3.83		1	1.00 17,522,804.78	0.00 17,522,804.78	22.02	AAA

GENERAL FUND												
LGIP												
TEXSTAR	TexSTAR	08/31/2026 08/31/2026	8,646,709.42	8,646,709.42 0.00	8,646,709.42	3.69		1	1.00 8,646,709.42	0.00 8,646,709.42	10.86	AAA
TXCLASS	Texas CLASS	08/31/2026 08/31/2026	1.03	1.03 0.00	1.03	3.82		1	1.00 1.03	0.00 1.03	0.00	AAA
LSGO	Lone Star Invest Pool - Government Overnight	08/31/2026 08/31/2026	74.86	74.86 0.00	74.86	3.67		1	1.00 74.86	0.00 74.86	0.00	AAA
TEXPRIME	TexPool Prime	08/31/2026 08/31/2026	1,400,198.31	1,400,198.31 0.00	1,400,198.31	3.85		1	1.00 1,400,198.31	0.00 1,400,198.31	1.76	AAA
LSCOP	Lone Star Invest Pool - Corp Overnight Plus Fund	08/31/2026 08/31/2026	20,631,868.37	20,631,868.37 0.00	20,631,868.37	3.89		1	1.00 20,631,868.37	0.00 20,631,868.37	25.92	AAA
TEXPOOL	TexPool	08/31/2026 08/31/2026	8,320,500.71	8,320,500.71 0.00	8,320,500.71	3.70		1	1.00 8,320,500.71	0.00 8,320,500.71	10.45	AAA
LGIP TOTAL			38,999,352.70	38,999,352.70 0.00	38,999,352.70	3.80		1	1.00 38,999,352.70	0.00 38,999,352.70	49.00	AAA
MONEY MARKET FUNDS												

Position Statement

CUSIP	DESCRIPTION	TRADE DATE SETTLE DATE	PAR VALUE	PRINCIPAL COST PURCHASED INTEREST	TOTAL COST	YIELD TO MATURITY	MATURITY DATE	DAYS TO MATURITY	MARKET PRICE MARKET VALUE	UNREALIZED GAIN/LOSS BOOK VALUE	% OF MV	MOODY'S S&P RATING
49-4026-8136	PNC Corporate Business Account	08/31/2026 08/31/2026	4,447,111.67	4,447,111.67 0.00	4,447,111.67	0.00		1	1.00 4,447,111.67	0.00 4,447,111.67	5.59	NA NA
49-4026-8101	PNC Corporate Business Account	08/31/2026 08/31/2026	3,383,245.49	3,383,245.49 0.00	3,383,245.49	0.00		1	1.00 3,383,245.49	0.00 3,383,245.49	4.25	NA NA
MONEY MARKET FUNDS TOTAL			7,830,357.16	7,830,357.16 0.00	7,830,357.16	0.00		1	1.00 7,830,357.16	0.00 7,830,357.16	9.84	NA
GENERAL FUND TOTAL			46,829,709.86	46,829,709.86 0.00	46,829,709.86	3.17		1	46,829,709.86	0.00 46,829,709.86	58.84	AAA
GRAND TOTAL			79,589,470.13	79,589,470.13 0.00	79,589,470.13	3.42		1	79,589,470.13	0.00 79,589,470.13	100.00	AAA

Cash Reconciliation Report

Transaction Statement

No activity during current
period

Amortization Schedule

CUSIP	DESCRIPTION	PAR VALUE	PRINCIPAL COST	ORIGINAL PREMIUM OR DISCOUNT	BEGINNING BOOK VALUE	CURRENT PERIOD AMORT	ENDING BOOK VALUE	TOTAL AMORTIZATION	UNAMORTIZED BALANCE
GRAND TOTAL		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00



Accrued Interest Schedule

IDENTIFIER	DESCRIPTION	SETTLE DATE	PAR VALUE	PRINCIPAL COST	BEGINNING ACCRUED INTEREST	PURCHASED INTEREST	CURRENT PERIOD ACCRUAL	INTEREST RECEIVED	ENDING ACCRUED INTEREST
2022 BOND FUND									
LSCOP	Lone Star Invest Pool - Corp Overnight Plus Fund	2026-08-31	3,286,123.47	3,286,123.47	0.00	0.00	31,616.75	31,616.75	0.00
46-8635-0176	PNC Government Checking Account	2026-08-31	385,860.16	385,860.16	0.00	0.00	0.00	0.00	0.00
TEXSTAR	TexSTAR	2026-08-31	2,392,159.89	2,392,159.89	0.00	0.00	41,680.49	41,680.49	0.00
TXCLASS	Texas CLASS	2026-08-31	3,071,460.26	3,071,460.26	0.00	0.00	42,412.90	42,412.90	0.00
TOTAL			9,135,603.78	9,135,603.78	0.00	0.00	115,710.14	115,710.14	0.00
2026 BOND FUND									
TXCLASS	Texas CLASS	2026-08-31	6,100,889.71	6,100,889.71	0.00	0.00	58,066.36	58,066.36	0.00
TOTAL			6,100,889.71	6,100,889.71	0.00	0.00	58,066.36	58,066.36	1440
CONSTRUCTION FUNDS									
49-4234-4745	PNC Corporate Business Account	2026-08-31	462.00	462.00	0.00	0.00	0.00	0.00	0.00
TOTAL			462.00	462.00	0.00	0.00	0.00	0.00	0.00
DEBT SERVICE FUNDS									
LSCOP	Lone Star Invest Pool - Corp Overnight Plus Fund	2026-08-31	8,544,191.35	8,544,191.35	0.00	0.00	82,206.16	82,206.16	0.00
49-4026-8128	PNC Corporate Business Account	2026-08-31	72,410.59	72,410.59	0.00	0.00	0.00	0.00	0.00
TEXPRIME	TexPool Prime	2026-08-31	6,363,655.50	6,363,655.50	0.00	0.00	109,121.22	109,121.22	0.00
TEXSTAR	TexSTAR	2026-08-31	2,542,547.34	2,542,547.34	0.00	0.00	23,139.13	23,139.13	0.00
TOTAL			17,522,804.78	17,522,804.78	0.00	0.00	214,466.51	214,466.51	0.00
GENERAL FUND									
LSCOP	Lone Star Invest Pool - Corp Overnight Plus Fund	2026-08-31	20,631,868.37	20,631,868.37	0.00	0.00	185,850.06	185,850.06	0.00
LSGO	Lone Star Invest Pool - Government Overnight	2026-08-31	74.86	74.86	0.00	0.00	0.68	0.68	0.00
49-4026-8136	PNC Corporate Business Account	2026-08-31	4,447,111.67	4,447,111.67	0.00	0.00	0.00	0.00	0.00
49-4026-8101	PNC Corporate Business Account	2026-08-31	3,383,245.49	3,383,245.49	0.00	0.00	0.00	0.00	0.00
TEXPOOL	TexPool	2026-08-31	8,320,500.71	8,320,500.71	0.00	0.00	89,072.53	89,072.53	0.00

Accrued Interest Schedule

IDENTIFIER	DESCRIPTION	SETTLE DATE	PAR VALUE	PRINCIPAL COST	BEGINNING ACCRUED INTEREST	PURCHASED INTEREST	CURRENT PERIOD ACCRUAL	INTEREST RECEIVED	ENDING ACCRUED INTEREST
TEXPRIME	TexPool Prime	2026-08-31	1,400,198.31	1,400,198.31	0.00	0.00	13,322.72	13,322.72	0.00
TEXSTAR	TexSTAR	2026-08-31	8,646,709.42	8,646,709.42	0.00	0.00	83,987.40	83,987.40	0.00
TXCLASS	Texas CLASS	2026-08-31	1.03	1.03	0.00	0.00	0.00	0.00	0.00
TOTAL			46,829,709.86	46,829,709.86	0.00	0.00	372,233.39	372,233.39	0.00
GRAND TOTAL			79,589,470.13	79,589,470.13	0.00	0.00	760,476.40	760,476.40	0.00



Earnings by Fund

CUSIP	DESCRIPTION	ENDING PAR VALUE	BEGINNING BOOK VALUE	ENDING BOOK VALUE	FINAL MATURITY	COUPON RATE	YIELD	INTEREST EARNED	NET AMORTIZATION/ ACCRETION INCOME	NET REALIZED GAIN/LOSS	ADJUSTED INTEREST EARNINGS
2022 BOND FUND											
46-8635-0176	PNC Government Checking Account	385,860.16	341,635.04	385,860.16	08/31/2026	0.00	0.00	0.00	0.00	0.00	0.00
LSCOP	Lone Star Invest Pool - Corp Over-night Plus Fund	3,286,123.47	3,254,506.72	3,286,123.47	08/31/2026	0.00	3.89	31,616.75	0.00	0.00	31,616.75
TEXSTAR	TexSTAR	2,392,159.89	6,150,479.40	2,392,159.89	08/31/2026	5.30	3.69	41,680.49	0.00	0.00	41,680.49
TXCLASS	Texas CLASS	3,071,460.26	4,529,047.36	3,071,460.26	08/31/2026	0.00	3.86	42,412.90	0.00	0.00	42,412.90
TOTAL		9,135,603.78	14,275,668.52	9,135,603.78		1.39	3.66	115,710.14	0.00	0.00	115,710.14
2026 BOND FUND											
TXCLASS	Texas CLASS	6,100,889.71	6,042,823.35	6,100,889.71	08/31/2026	0.00	3.86	58,066.36	0.00	0.00	58,066.36
TOTAL		6,100,889.71	6,042,823.35	6,100,889.71		0.00	3.86	58,066.36	0.00	0.00	58,066.36
CONSTRUCTION FUNDS											
49-4234-4745	PNC Corporate Business Account	462.00	434.00	462.00	08/31/2026	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL		462.00	434.00	462.00		0.00	0.00	0.00	0.00	0.00	0.00
DEBT SERVICE FUNDS											
49-4026-8128	PNC Corporate Business Account	72,410.59	34,461.84	72,410.59	08/31/2026	0.00	0.00	0.00	0.00	0.00	0.00
LSCOP	Lone Star Invest Pool - Corp Over-night Plus Fund	8,544,191.35	8,461,985.19	8,544,191.35	08/31/2026	0.00	3.89	82,206.16	0.00	0.00	82,206.16
TEXPRIME	TexPool Prime	6,363,655.50	13,292,345.11	6,363,655.50	08/31/2026	4.50	3.85	109,121.22	0.00	0.00	109,121.22
TEXSTAR	TexSTAR	2,542,547.34	2,519,408.21	2,542,547.34	08/31/2026	5.30	3.69	23,139.13	0.00	0.00	23,139.13
TOTAL		17,522,804.78	24,308,200.35	17,522,804.78		2.40	3.83	214,466.51	0.00	0.00	214,466.51
GENERAL FUND											
49-4026-8101	PNC Corporate Business Account	3,383,245.49	3,740,837.31	3,383,245.49	08/31/2026	0.00	0.00	0.00	0.00	0.00	0.00
49-4026-8136	PNC Corporate Business Account	4,447,111.67	1,307,059.92	4,447,111.67	08/31/2026	0.00	0.00	0.00	0.00	0.00	0.00
LSCOP	Lone Star Invest Pool - Corp Over-night Plus Fund	20,631,868.37	17,921,055.52	20,631,868.37	08/31/2026	0.00	3.89	185,850.06	0.00	0.00	185,850.06
LSGO	Lone Star Invest Pool - Government Overnight	74.86	74.18	74.86	08/31/2026	0.00	3.67	0.68	0.00	0.00	0.68

Earnings by Fund

CUSIP	DESCRIPTION	ENDING PAR VALUE	BEGINNING BOOK VALUE	ENDING BOOK VALUE	FINAL MATURITY	COUPON RATE	YIELD	INTEREST EARNED	NET AMORTIZATION/ ACCRETION INCOME	NET REALIZED GAIN/LOSS	ADJUSTED INTEREST EARNINGS
TEXPOOL	TexPool	8,320,500.71	12,124,284.15	8,320,500.71	08/31/2026	5.34	3.70	89,072.53	0.00	0.00	89,072.53
TEXPRIME	TexPool Prime	1,400,198.31	1,379,848.77	1,400,198.31	08/31/2026	4.50	3.85	13,322.72	0.00	0.00	13,322.72
TEXSTAR	TexSTAR	8,646,709.42	9,362,722.02	8,646,709.42	08/31/2026	5.30	3.69	83,987.40	0.00	0.00	83,987.40
TXCLASS	Texas CLASS	1.03	1.03	1.03	08/31/2026	0.00	3.82	0.00	0.00	0.00	0.00
TOTAL		46,829,709.86	45,835,882.90	46,829,709.86		2.06	3.17	372,233.39	0.00	0.00	372,233.39
GRAND TOTAL		79,589,470.13	90,463,009.12	79,589,470.13		1.90	3.42	760,476.40	0.00	0.00	760,476.40

Projected Cashflows
For the Period September 01, 2026 to February 28, 2027

CUSIP	DESCRIPTION	POST DATE	TRANSACTION TYPE	AMOUNT
GRAND TOTAL				



Change in Value

IDENTIFIER	ISSUER PAR VALUE	YIELD	TRADE DATE MATURITY DATE	INTEREST ACCRUAL INTEREST RECEIVED	BEGINNING BOOK VALUE BEGINNING MARKET VALUE	PURCHASES/ ADDITIONS	REDEMPTIONS	CHANGE IN BOOK VALUE CHANGE IN MARKET VALUE	ENDING BOOK VALUE ENDING MARKET VALUE
2022 BOND FUND									
46-8635-0176	PNC Government Checking Account 385,860.16	0.00	08/31/2026	0.00 0.00	341,635.04 341,635.04	68,331.40	(24,106.28)	44,225.12 44,225.12	385,860.16 385,860.16
TEXSTAR	TexSTAR 2,392,159.89	3.69	08/31/2026	41,680.49 41,680.49	6,150,479.40 6,150,479.40	0.00	(3,758,319.51)	(3,758,319.51) (3,758,319.51)	2,392,159.89 2,392,159.89
LSCOP	Lone Star Invest Pool - Corp Over- night Plus Fund 3,286,123.47	3.89	08/31/2026	31,616.75 31,616.75	3,254,506.72 3,254,506.72	31,616.75	0.00	31,616.75 31,616.75	3,286,123.47 3,286,123.47
TXCLASS	Texas CLASS 3,071,460.26	3.86	08/31/2026	42,412.90 42,412.90	4,529,047.36 4,529,047.36	28,654.20	(1,486,241.30)	(1,457,587.10) (1,457,587.10)	3,071,460.26 3,071,460.26
TOTAL		3.66		115,710.14 115,710.14	14,275,668.52 14,275,668.52	128,602.35	(5,268,667.09)	(5,140,064.74) (5,140,064.74)	9,135,603.78 9,135,603.78

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2026 BOND FUND									
TXCLASS	Texas CLASS 6,100,889.71	3.86	08/31/2026	58,066.36 58,066.36	6,042,823.35 6,042,823.35	58,066.36	0.00	58,066.36 58,066.36	6,100,889.71 6,100,889.71
TOTAL		3.86		58,066.36 58,066.36	6,042,823.35 6,042,823.35	58,066.36	0.00	58,066.36 58,066.36	6,100,889.71 6,100,889.71

CONSTRUCTION FUNDS									
49-4234-4745	PNC Corporate Business Account 462.00	0.00	08/31/2026	0.00 0.00	434.00 434.00	28.00	0.00	28.00 28.00	462.00 462.00
TOTAL		0.00		0.00 0.00	434.00 434.00	28.00	0.00	28.00 28.00	462.00 462.00

DEBT SERVICE FUNDS									
LSCOP	Lone Star Invest Pool - Corp Over- night Plus Fund 8,544,191.35	3.89	08/31/2026	82,206.16 82,206.16	8,461,985.19 8,461,985.19	82,206.16	0.00	82,206.16 82,206.16	8,544,191.35 8,544,191.35
49-4026-8128	PNC Corporate Business Account 72,410.59	0.00	08/31/2026	0.00 0.00	34,461.84 34,461.84	43,168.75	(5,220.00)	37,948.75 37,948.75	72,410.59 72,410.59
TEXSTAR	TexSTAR 2,542,547.34	3.69	08/31/2026	23,139.13 23,139.13	2,519,408.21 2,519,408.21	23,139.13	0.00	23,139.13 23,139.13	2,542,547.34 2,542,547.34



Change in Value

IDENTIFIER	ISSUER PAR VALUE	YIELD	TRADE DATE MATURITY DATE	INTEREST ACCRUAL INTEREST RECEIVED	BEGINNING BOOK VALUE BEGINNING MARKET VALUE	PURCHASES/ ADDITIONS	REDEMPTIONS	CHANGE IN BOOK VALUE CHANGE IN MARKET VALUE	ENDING BOOK VALUE ENDING MARKET VALUE
TEXPRIME	TexPool Prime 6,363,655.50	3.85	08/31/2026	109,121.22 109,121.22	13,292,345.11 13,292,345.11	195,502.73	(7,124,192.34)	(6,928,689.61) (6,928,689.61)	6,363,655.50 6,363,655.50
TOTAL		3.83		214,466.51 214,466.51	24,308,200.35 24,308,200.35	344,016.77	(7,129,412.34)	(6,785,395.57) (6,785,395.57)	17,522,804.78 17,522,804.78

GENERAL FUND

LSCO	Lone Star Invest Pool - Government Overnight 74.86	3.67	08/31/2026	0.68 0.68	74.18 74.18	0.68	0.00	0.68 0.68	74.86 74.86
49-4026-8101	PNC Corporate Business Account 3,383,245.49	0.00	08/31/2026	0.00 0.00	3,740,837.31 3,740,837.31	2,595,406.53	(2,952,998.35)	(357,591.82) (357,591.82)	3,383,245.49 3,383,245.49
TEXPOOL	TexPool 8,320,500.71	3.70	08/31/2026	89,072.53 89,072.53	12,124,284.15 12,124,284.15	0.00	(3,803,783.44)	(3,803,783.44) (3,803,783.44)	8,320,500.71 8,320,500.71
TEXPRIME	TexPool Prime 1,400,198.31	3.85	08/31/2026	13,322.72 13,322.72	1,379,848.77 1,379,848.77	20,349.54	0.00	20,349.54 20,349.54	1,400,198.31 1,400,198.31
LSCOP	Lone Star Invest Pool - Corp Over- night Plus Fund 20,631,868.37	3.89	08/31/2026	185,850.06 185,850.06	17,921,055.52 17,921,055.52	5,963,966.41	(3,253,153.56)	2,710,812.85 2,710,812.85	20,631,868.37 20,631,868.37
49-4026-8136	PNC Corporate Business Account 4,447,111.67	0.00	08/31/2026	0.00 0.00	1,307,059.92 1,307,059.92	4,372,145.83	(1,232,094.08)	3,140,051.75 3,140,051.75	4,447,111.67 4,447,111.67
TXCLASS	Texas CLASS 1.03	3.82	05/31/2023 08/31/2026	0.00 0.00	1.03 1.03	0.00	0.00	0.00 0.00	1.03 1.03
TEXSTAR	TexSTAR 8,646,709.42	3.69	08/31/2026	83,987.40 83,987.40	9,362,722.02 9,362,722.02	56,747.63	(772,760.23)	(716,012.60) (716,012.60)	8,646,709.42 8,646,709.42
TOTAL		3.17		372,233.39 372,233.39	45,835,882.90 45,835,882.90	13,008,616.62	(12,014,789.66)	993,826.96 993,826.96	46,829,709.86 46,829,709.86

GRAND TOTAL		3.42		760,476.40 760,476.40	90,463,009.12 90,463,009.12	13,539,330.10	(24,412,869.09)		79,589,470.13 79,589,470.13
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Disclosure

Meeder provides monthly statements for its investment management clients to provide information about the investment portfolio. The information should not be used for audit or confirmation purposes. Please review your custodial statements and report any inaccuracies or discrepancies.

Certain information and data has been supplied by unaffiliated third parties. Although Meeder believes the information is reliable, it cannot warrant the accuracy of information offered by third parties. Market value may reflect prices received from pricing vendors when current market quotations are not available. Prices may not reflect firm bids or offers and may differ from the value at which the security can be sold.

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Belton Independent School District
Board of Trustee Meeting Agenda Item
September 21, 2026

Item: Gifts, Grants, and Bequests

Contact Person: Melissa Lafferty

Presented for: ☒ Action ☐ Report Only

Supporting Documents: ☐ None ☒ Attached ☐ Provided Later

District Priority or Strategic Objective:

Priority 4: Fiscal Management - Maximize student experiences through transparent, strategic, and sustainable fiscal management.

Background Information:

The District accepts gifts, grants, and bequests from many different sources each school year for the benefit of its students and programs. Policy CDC(LOCAL) gives authority to the Superintendent to accept most gifts, grants, or bequests.

Fiscal Implications:

Attached for your information is a list of donations that have been accepted. Budget amendments required for the expenditure of these funds will be presented as needed.

Administrative Recommendation(s):

Information only.

Gifts, Grants, and Bequests
September 21, 2026

Source of Other Revenue/In Kind Donations	Type	Amount/ Value	Date	District, Campus, or Program	Intended Use
Athletic Booster Club	Check	\$10,000.00	8/17/2026	Lake Belton High School - Athletics	Funds to help cover HUDL
Athletic Booster Club	Check	\$3,831.30	8/17/2026	Lake Belton High School - Football	Funds to help cover knee braces
Miso Pick & Mix	Check	\$500.00	8/25/2026	South Belton Middle School - Cheer	Equipment, uniforms, and competition fees
Extreme Cheer-N-Tumble LLC	Check	\$250.00	8/25/2026	South Belton Middle School - Cheer	Equipment, uniforms, and competition fees
Carter Blood Care	Check	\$1,500.00	8/28/2026	Belton High School - HOSA	HOSA activities
Charter Oak PTA	Check	\$3,500.00	9/1/2026	Charter Oak Elementary	Funds to help cover Capturing Kids Hearts and Freckle
High Point PTA	Check	\$5,000.00	9/1/2026	High Point Elementary	Funds to help cover Capturing Kids Hearts
Lakewood PTA	Check	\$8,000.00	9/1/2026	Lakewood Elementary	2026-2027 Field Trips

Belton Independent School District
Board of Trustee Meeting Agenda Item
September 21, 2026

Item: Budget Amendment #1 for 2026-2027

Contact Person: Melissa Lafferty

Presented for: ☒ Action ☐ Report Only

Supporting Documents: ☐ None ☒ Attached ☐ Provided Later

District Priority or Strategic Objective:

Priority 4: Fiscal Management - Maximize student experiences through transparent, strategic, and sustainable fiscal management.

Background Information:

The TEA Financial Accountability System Resource Guide sets forth guidelines on budget amendments. Budget amendments are required by the State to reclassify appropriations at the level at which the budget is adopted. Belton ISD adopts budgets for the required funds at the functional level. Amendments which reclassify appropriations from one functional level to another should be approved by the Board. The budget may also be amended by the Board for changes in the level of its Revenue and Expenditures in accordance with CE(Legal/Local). Amendments are recorded in the District's Board minutes.

Budget amendments are presented monthly, as needed. The changes are described below.

Fiscal Implications:

General Fund

Expenditures:

- **Instruction (11): (\$557,862)**
 - (\$557,562): *Reallocation of Innovation Specialists salaries*
 - (\$300): *Redistribution of funds for various needs*
- **Library & Media Services (12): \$557,562**
 - \$557,562: *Reallocation of Innovation Specialists salaries*
- **Guidance & Counseling Services (31): \$300**
 - \$300: *Redistribution of funds for various needs*

The net effect of these amendments to the general fund balance is \$0.

Debt Service

Expenditures:

- **Debt Service (71): \$557,273**

- \$557,273: *Bond issuance cost related to the 2017 bond refinancing*

Resources and Uses:

- **Other Resources:**
 - \$61,736,219: *Bond proceeds related to the 2017 bond refinancing*
- **Other Uses:**
 - (\$61,174,864): *Bond disbursements related to the 2017 bond refinancing*

The net effect of these amendments to the debt service fund balance is an increase of \$4,082.

Administrative Recommendation(s):

Approve amendments as presented.

2026-27 Budget Amendment Proposed For Adoption By The Board Of Trustees
Belton ISD - September 21, 2026

Function	General Fund			
	Original Adopted Budget	Previously Amended Budget	Summary of Proposed Amendments	Proposed Amended Budget
REVENUES				
Local	\$ 47,718,341	\$ 47,718,341	-	47,718,341
State	103,346,320	103,346,320	-	103,346,320
Federal	1,405,000	1,405,000	-	1,405,000
	152,469,661	152,469,661	-	152,469,661
EXPENDITURES				
11 Instruction	86,455,648	86,455,648	(557,862)	85,897,786
12 Library & Media Services	378,699	378,699	557,562	936,261
13 Curriculum & Staff Development	2,990,253	2,990,253	-	2,990,253
21 Instructional Leadership	2,371,124	2,371,124	-	2,371,124
23 School Leadership	9,698,560	9,698,560	-	9,698,560
31 Guidance and Counseling Services	6,881,771	6,881,771	300	6,882,071
32 Social Work Services	192,653	192,653	-	192,653
33 Health Services	2,459,497	2,459,497	-	2,459,497
34 Student Transportation	6,280,986	6,280,986	-	6,280,986
35 School Nutrition	-	-	-	-
36 Co-curricular Activities	5,550,310	5,550,310	-	5,550,310
41 General Administration	4,161,788	4,161,788	-	4,161,788
51 Facilities Maintenance & Operations	14,983,173	14,983,173	-	14,983,173
52 Security and Monitoring	3,312,548	3,312,548	-	3,312,548
53 Data Processing Services	5,013,651	5,013,651	-	5,013,651
61 Community Services	-	-	-	-
71 Debt Service	314,000	314,000	-	314,000
81 Facilities Acquisition & Construction	-	-	-	-
93 Payments to fiscal agent	-	-	-	-
95 Payments to JJAEP	-	-	-	-
97 Tax Increment	650,000	650,000	-	650,000
99 Other Intergovernmental Charges	775,000	775,000	-	775,000
Total Expenditures	152,469,661	152,469,661	-	152,469,661
Revenues Over (Under) Expenditures	-	-	-	-
Other Sources	-	-	-	-
Other Uses	-	-	-	-
Budgeted/Estimated Change in Fund Balance	\$ -	\$ -	\$ -	\$ -

Budget amendments for these funds are required to be adopted by the Board of Trustees.

2026-27 Budget Amendment Proposed For Adoption By The Board Of Trustees
Belton ISD - September 21, 2026

Function	Debt Service			
	Original Adopted Budget	Previously Amended Budget	Summary of Proposed Amendments	Proposed Amended Budget
REVENUES				
Local	\$ 22,139,396	\$ 22,139,396	-	\$ 22,139,396
State	6,736,424	6,736,424	-	\$ 6,736,424
Federal	-	-	-	\$ -
	28,875,820	28,875,820	-	28,875,820
EXPENDITURES				
71 Debt Service	28,240,770	28,240,770	557,273	28,798,043
Total Expenditures	28,240,770	28,240,770	557,273	28,798,043
Revenues Over (Under) Expenditures	635,050	635,050	(557,273)	77,777
Other Resources	-	-	61,736,219	61,736,219
Other Uses	-	-	(61,174,864)	(61,174,864)
Budgeted/Estimated Change in Fund Balance	\$ 635,050	\$ 635,050	\$ 4,082	\$ 639,132

Budget amendments for these funds are required to be adopted by the Board of Trustees.

Belton Independent School District
Board of Trustee Meeting Agenda Item
September 21, 2026

Item: Expenditures over \$100,000

Contact Person: Melissa Lafferty

Presented for: ☒ Action ☐ Report Only

Supporting Documents: ☒ None ☐ Attached ☐ Provided Later

District Priority or Strategic Objective:

Priority 4: Fiscal Management - Maximize student experiences through transparent, strategic, and sustainable fiscal management.

Background Information:

Board Policy CH(LOCAL) requires that any single budgeted purchase of goods or services that costs \$100,000 or more requires Board approval before a transaction may take place. The following list of proposed purchases is submitted for your consideration:

Renewal of Insights Investments, LLC for Lightspeed Filtering

Lightspeed Systems is an internet filtering program. The agreement carries an annual cost of \$140,000 over a five-year term, for a total contract value of \$700,000. Lightspeed Systems participates in the Choice Partners Contract.

Game One for Nike Partnership

Belton ISD is renewing a 5-year exclusive partnership agreement with Game One for athletic equipment, uniforms, and branded apparel. All seven district athletic campuses will use Game One and Nike as their exclusive apparel provider. This agreement will include discounts on Uniforms (40%), Footwear (35%), Unbranded Apparel (30%), Nike Accessories (25%) and Equipment/Hardgoods (Preferred Plus Pricing). The total annual cost will be approximately \$160,000. Game One is an approved vendor.

Fiscal Implications:

Insights Investments LLC and Game One will be funded by the General Fund.

Administrative Recommendation(s):

Approve the requested expenditures as presented.

Belton Independent School District
Board of Trustee Meeting Agenda Item

September 21, 2026

Item: RFP #2606-125-415 for Awards, Trophies, Plaques and Related Items

Contact Person: Tammy Shannon

Presented for: ☒ Action ☐ Report Only

Supporting Documents: ☐ None ☒ Attached ☐ Provided Later

District Priority or Strategic Objective:

Priority 4: Fiscal Management – Maximize student experiences through transparent, strategic, and sustainable fiscal management.

Background Information:

RFP #2606-125-415 for Award, Trophies, Plaques and Related Items was posted on June 9, 2026.

This proposal allows the purchase of goods and services on an as-needed basis. Pursuant to Section 2252.908 of Government Code, HB 1295 form has been received and will be acknowledged on the Texas Ethics Commission website.

Fiscal Implications:

Funds for Award, Trophies, Plaques and Related Items are allocated in the annual budget.

Administrative Recommendation(s):

Approve the vendor list for Award, Trophies, Plaques and Related Items. This contract will be effective through September 30, 2027, with three (3) consecutive one-year automatic renewals.

Awards, Trophies, Plaques & Related Items
RFP #2606-125-415

1st Place Awards & Gifts

4imprint, Inc.

ABI Digital Solutions Digital

Performance Gear

Absolute Promotional, LLC

Award Specialties

Big Hit Creative Group

Brown Industries

Centex Recognition

Custom Signs

D & L Trophies

Educational Outfitters

ELITE Promotions

Fundraiser Blankets

Gandy Ink

Glendale Parade Store, LLC

Hilliard's Trophy

Hodges Badge Company, Inc.

House of Ribbons

J. Brandt Recognition Ltd

Jostens, Inc.

Liberty Office Product

Litho Press, Inc.

MTM Recognition dba Jostens Awards

Oriental Trading Company and

MindWare

Positive Promotions, Inc.

School Life

Sign Solutions, Inc.

Southwest Emblem Company

Spirit Monkey, LLC

SSR Jackets

Stealth Mode Three

Texas Music Festivals Enterprise, Inc.

The Master Teacher, Inc.

Versa Printing

Belton Independent School District
Board of Trustee Meeting Agenda Item
September 21, 2026

Item: RFP #2608-375-429 for Group Travel Services

Contact Person: Tammy Shannon

Presented for: ☒ Action ☐ Report Only

Supporting Documents: ☐ None ☒ Attached ☐ Provided Later

District Priority or Strategic Objective:

Priority 4: Fiscal Management – Maximize student experiences through transparent, strategic, and sustainable fiscal management.

Background Information:

RFP #2608-375-429 for Group Travel Services was posted on August 6, 2026, to solicit potential vendors to provide student and/or employee group travel for the District.

This proposal is primarily for, but not limited to, hotel and flight accommodation, performance venue bookings, entertainment tickets, meal coordination and related services for student groups and sponsor travel. This proposal allows the purchase of goods and services on an as-needed basis. Pursuant to Section 2252.908 of Government Code, HB 1295 forms have been received and will be acknowledged on the Texas Ethics Commission website. This contract will be effective October 1, 2026, through September 30, 2027, with three (3) consecutive one-year automatic renewals.

Fiscal Implications:

Funds for Group Travel Services are allocated in the annual budget.

Administrative Recommendation(s):

Approve the vendor list for Group Travel Services as presented.

**Group Travel Services
RFP #2608-375-429**

American Classic Tours and Music
Festivals
Bob Rogers Travel
Champion Tours & Events, Inc.
Director's Choice
Echo Transportation
Educational Tours and Travel
Corporation
Educational Travel Adventures
EF Explore America
EF Institute for Cultural Exchange, Inc.
Freedom Charters and Tours, LLC
Groople Texas, LLC
Junior Tours
Lakeland Tours LLC, dba WorldStrides
Perform America-Texas, LLC
Prometour USA, Inc.
Tour-Rific of Texas

Belton Independent School District
Board of Trustees Meeting Agenda Item

September 21, 2026

Item: School Library Advisory Council Recommendation for Library Materials Purchase

Contact Person: Gabi Nino

Presented for: ☒ Action ☐ Report Only

Supporting Documents: ☐ None ☒ Attached ☐ Provided Later

District Priority or Strategic Objective:

Priority 1: Students - Ensure exceptional learning experiences that bring our “Journey of a Graduate” to life for each and every student.

Background Information:

The School Library Advisory Council convened on September 2, 2026, and reviewed a proposed book list, with an initial recommended order of 112 accumulated titles. The list was collaboratively generated by Belton ISD Innovation Specialists in alignment with collection standards and guidelines and was posted online for 30 days prior to bringing it to the SLAC for consideration. Based on the materials presented and considerations discussed, the SLAC unanimously recommended that the full list be brought forth to the Board for consideration.

Fiscal Implications:

Individual Campus Purchases

Administrative Recommendation(s):

Approve the attached list of library books as recommended by the SLAC for purchase by individual campuses as presented.

ISBN	Title	Author	ES/MS/HS	Notes (if needed)	Review #1	Review #2
978-0-316-44216-9	The Mighty Macy	Kwame Alexander	ES		School Library Journal: Tender a	Publisher's Weekly: In this efferve
978-1-6659-3830-3	The Great Puptective: The Big Mousetake	Alina Tysoe	ES	next in series	School Library Journal: A light, e	Publisher's Weekly: In this efferve
978-1250905932	Alberto Salas juega la paka paka con la papa	Sara Andrea Fajardo	ES	TEJAS Star Award 26-27	Kirkus Reviews: Highlights the v	School Library Journal: praised as
978-1623544386	Bienvenida a casa, Esmerelda	Daniela Ramirez	ES	TEJAS Star Award 26-27	School Library Journal: Notes th	Publishers Weekly: Commends th
978-8410438019	La colcha de nuestros recuerdos	Desiree Acevedo	ES	TEJAS Star Award 26-27	Booklist: Praises this touching ir	Kirkus Reviews: Applauds the vis
978-1464228391	Día de los Muertos ABC/Day of the Dead ABC: A Bilingual Alphabet Book to Celebrate This Magical Holiday)	Gabriela Orozco Belt	ES	TEJAS Star Award 26-27	School Library Journal: Recomm	Kirkus Reviews: Notes that the al
978-1643796444	El deseo de mi corazón (The Reel Wish)	Yamile Saied Méndez	ES	TEJAS Star Award 26-27	Publishers Weekly: Celebrates t	School Library Journal: Highlights
978-1536234053	Elena va a acampar	Juana Medina	ES	TEJAS Star Award 26-27	Kirkus Reviews: Juana Medina's	School Library Journal: Praises th
978-1536247053	Esta es una escuela	John Schu	ES	TEJAS Star Award 26-27	Kirkus Reviews: A warm, inclusi	Publishers Weekly: Highlights the
978-1464251528	La flor generosa: la historia de la flor de nochebuena	Alda P. Dobbs	ES	TEJAS Star Award 26-27	Booklist: Richly illustrated and c	School Library Journal: Commenc
978-1623545802	Hermana pegajosa	Ana Siqueira	ES	TEJAS Star Award 26-27	Kirkus Reviews: A lighthearted,	Publishers Weekly: Praises the d
978-8419464934	El jarrón de las grietas doradas	Fran Nuno	ES	TEJAS Star Award 26-27	School Library Journal: <i>Comm</i>	Booklist: Highlights the thoughtful
978-8410074446	Martina futbolista	Susanna Isern	ES	TEJAS Star Award 26-27	Kirkus Reviews: Celebrates this	School Library Journal: Notes tha
978-0823456772	El oso polar y la bailarina	Eric Velasquez	ES	TEJAS Star Award 26-27	Publishers Weekly: Highlights th	Booklist: Praises the bright artwor
978-8410074842	Los pantalones de Luisa	Susanna Isern	ES	TEJAS Star Award 26-27	School Library Journal: A fun an	Booklist: Praises the bright artwor
978-1623544584	Popo el xolo	Paloma Angelina Lopez	ES	TEJAS Star Award 26-27	Kirkus Reviews: Praises the boc	School Library Journal: Recomme
978-8410406483	¡Sal de ahí topo!	Alicia Acosta	ES	TEJAS Star Award 26-27	Publishers Weekly: Calls this a f	Kirkus Reviews: Notes the expres
978-1962227407	La vida de Valenzuela	Patty Rodriguez and Ariana Stein,	ES	TEJAS Star Award 26-27	School Library Journal: Highly re	Booklist: Highlights the book's at
978-0823458349	Los viernes comemos churros	Jenny Alvarado	ES	TEJAS Star Award 26-27	Kirkus Reviews: A cozy, heart-fil	Publishers Weekly: Praises the se
978-1643796581	Wanda oye las estrellas: Una astrónoma ciego escucha al universo (Wanda Hears the Stars: A Blind Astronomer Listens to the Universe)	Wanda Diaz Merced	ES	TEJAS Star Award 26-27	School Library Journal: Strongly	Kirkus Reviews: Praises the emp
0-8479-0306-0	Sidekicks: Thick As Thieves	Santat, Dan	ES		Kirkus Reviews (Starred Review	The Horn Book Magazine: "This r
						Booklist (Starred Review): "The m
1-420-53605-2	Some of Us Are Brave	Farqui, Saadia	ES		Publishers Weekly (Starred Rev	
0-8479-2332-0	The Unlikely Tale of Chase and Fennigan	Warga, Jasmine	ES		Kirkus Reviews: "Warga crafts a	School Library Journal: "An inven
0-316-46423-6	The Girl Who Changed Little League	Patrick, Jean L. S. and P	ES		Publishers Weekly: "An inspiring	Booklist: "Dynamic illustrations co
0-06-335752-6	Seven Million Steps: The True Story of Dick Gregory's Run for the Hungry	Barnes, Derrick and Gre	ES		Kirkus Reviews (Starred Review	School Library Journal: "Barnes's
						<i>Booklist:</i>
0-593-89769-2	Navigating Night	Leung, Julie	ES		Publishers Weekly: "Leung's lyri	" <i>Rich in sensory detail and psych</i>
						School Library Journal:
0-593-90236	History Smashers: The Space Race	Messner, Kate	ES		Kirkus Reviews: "Messner conti	"Engaging comics, historical phot
						Booklist (Starred Review):
0-06-337262-2	The Whale's Tale and the Otter's Side of the Story	Messner, Kate	ES		Publishers Weekly (Starred Rev	"Told in a realistic manner with bri
						Publishers Weekly:
84-15-24199-2	Cuento de Noche	Aliaga, Roberto	ES		Kirkus Reviews: "A soothing, be	"Lyrical Spanish prose and soft, e
						School Library Journal:
1-524-73968-5	Wish In A Tree	Hunt, Lynda Mullaly	ES		Booklist: "Hunt brings her signat	"A deeply moving, accessible nov
						School Library Journal:
979-88-909833-1-2	Un Deseo En El Arbol	Hunt, Lynda Mullaly	ES		Booklist: "Hunt brings her signat	"A deeply moving, accessible nov
						Kirkus Reviews:
978-0593695937	This Is a Moment	Player, Micah	ES		Publishers Weekly: "Player capt	"An uplifting picture book that invi
					School Library Journal (Starred	
978-0-593-53160-0	Brave	Alvitre, Weshoyot	ES		"Visually stunning and deeply ro	Kirkus Reviews: "Striking artwork

ISBN	Title	Author	ES/MS/HS	Notes (if needed)	Review #1	Review #2
978-0-374-39220-8	Thank You Teacher	Kelkar, Supriya	ES		Publishers Weekly: "A heartwarmin	Booklist: "Kelkar's affectionate narrative sh
978-1-7972-0072-9	Shrinking Violet	Snyder, Laurel	ES		Kirkus Reviews: "Snyder writes	<i>School Library Journal</i> : "Relatable and emotionally reson
978-0-593-69523-4	Billy and the Hole	Goecke, Jessica	ES		Publishers Weekly: "A quirky, ab	Booklist: "With expressive cartooning and c
979-82-17-03999-9	A Day off School	Jeffers, Oliver	ES		Kirkus Reviews (Starred Review	Publishers Weekly: "A charming, wonderfully illustrate
978-1-250-33477-0	Mind Vs Machine	Sheinkin, Steve and Ash	ES		Publishers Weekly (Starred Rev	Booklist (Starred Review): "A masterclass in narrative nonfic
978-1-546-11103-0	Offside	Gonzalez, Christina Diaz	ES		School Library Journal: "A grippi	Kirkus Reviews: "Gonzalez excels at creating auth
978-1-546-18594-9	Licorice	LaReau, Kara	ES		Publishers Weekly: "A delightful	Booklist: "Charming illustrations and breez
978-1-324-12489-4	Absent	Ogle, Rex	ES		Kirkus Reviews: "Ogle delivers a	School Library Journal (Starred R "A powerful, unforgettable story th
978-1-464-24126-0	The Secret Bookstore Sleuth Society	Currie, Lindsay	ES		Booklist: "Currie blends eerie at	Kirkus Reviews: "A fun, page-turning adventure br
978-0-06-351510-9	Building 903	Lowry, Lois	ES		Publishers Weekly (Starred Rev	Kirkus Reviews: "A thought-provoking, beautifully v
979-8-225-06319-1	Flight: A Story of Taking Refuge	Gratz, Alan	ES		Publishers Weekly (Starred Rev	School Library Journal (Starred R "Heart-pounding and deeply comp
978-0-316-57059-6	The Gallaudet Eleven: The Story of NASA's Deaf Bioastronauts	Cerra, Kerry O'Malley	ES		Kirkus Reviews (Starred Review	"A fascinating, long-overdue look Booklist: "An illuminating, meticul
978-0-06-345588-7	The Skeleton and the Cat	Scott, Brandon James	ES		School Library Journal: "A charm	Publishers Weekly: "Scott's expressive character des
978-1-636-55192-0	Barbed Wire Between Us	Encarnacion, Violeta	ES		Kirkus Reviews: "A poignant his	Booklist: "Sensitive storytelling and rich ch
978-0-593-69823-5	Our Lake	Kang, Angie	ES		Publishers Weekly: "A quiet, evoc	School Library Journal: "Kang's lush, atmospheric illustra
978-1-546-12611-9	Sleepless	Korman, Gordon	ES		Kirkus Reviews: "Korman's signature blend of hig	Booklist: "A thrilling, wildly enterta
978-0-593-48558-3	When Tomorrow Burns	Keller, Tae	MS		<i>Publishers Weekly (Starred Rev</i>	Kirkus Reviews (Starred Review): "Keller weaves magical realism
978-0-06-236431-9	Stubby	Mallery, Sydra	ES		<i>School Library Journal</i> : "An affectionate and engaging p	Booklist: "Delightful illustrations a
979-8-88160-243-7	Big Nate Curse of the Puffy Shorts	Peirce, Lincoln	ES	Next In Series	Kirkus Reviews: "Peirce keeps t	Publishers Weekly: "Big Nate fans will welcome this h
978-0-316-51068-4	Catstronauts: Module Mayhem	Brockington, Drew	ES	Next In Series	School Library Journal: "Brockin	Booklist: "Clever visual jokes, end
978-1-546-13928-7	Diary of a Pug: Pug Goes to Hollywood	May, Kyla	ES	Next In Series	Publishers Weekly: "Bright illust	School Library Journal: "Fast-paced and fun, May's colorf

ISBN	Title	Author	ES/MS/HS	Notes (if needed)	Review #1	Review #2
978-1-546-13925-6	Diary of a Pug: Pug's Cupcake	May, Kyla	ES	Next In Series	Publishers Weekly: "Bright illustra	School Library Journal: "Fast-paced and fun, May's colorf
978-1-546-13775-7	I Survived the Bombing of Pearl Harbor, 1941	Tarshis, Lauren	ES	Next In Series	Kirkus Reviews: "Tarshis seaml	School Library Journal: "An accessible, fast-paced entry i
978-1-250-35791-5	Investigators Weather or Not	Green, John Patrick	ES	Next In Series	Publishers Weekly: "Green's pu	Booklist: "A colorful, laugh-out-loud detecti
978-0-593-64572-7	Junie B. Jones and Some Sneaky Peeky Spying	Park, Barbara and Vena	ES	Next In Series	Kirkus Reviews: "Venable's ada	School Library Journal: "A visual t
978-0-593-64569-7	Junie B. Jones and Her Big Fat Mouth	Venable, Colleen Af and	ES	Next In Series	Kirkus Reviews: "Venable's ada	School Library Journal: "A visual t
978-0-593-57044-9	Katie the CatSitter: Villan Con	Venable, Colleen Af	ES	Next In Series	Publishers Weekly: "Venable an	
978-1-420-53457-3	Misfits: A Sea Monster Conundrum	Yee, Lisa	ES	Next In Series	Kirkus Reviews: "Yee delivers a	School Library Journal: "A charming middle-grade myster
978-1-546-13554-8	Babysitters Club: Dawn On the Coast	Nopra, Arley	ES	Next In Series	"Nopra's expressive adaptation	
978-1-546-19935-9	DogMan: A Sprinkle in Time	Pilkey, Dav	ES	Next In Series	Kirkus Reviews (Starred Review	Publishers Weekly (Starred Review
978-0-8075-0562-5	Bats Beneath the Bridge	Nolan, Janet	ES	Topaz Award K-2	Kirkus Reviews Texans learn to	
978-1-525-31294-6	I'm Longer Than You: An Epic Contest of Measurement	Fisher, Carolyn	ES	Topaz Award K-2	Kirkus Reviews With a free lunc	
978-0-8479-1383-1	This is my Brain! A Book on Neurodiversity	Gravel, Elise	ES	Topaz Award K-2	ALA Booklist (9/1/24) Though all	Kirkus Reviews An affirmation tha
978-1-682-63733-3	Mighty: The Story of an Oak Tree Ecosystem	Cole, Henry	ES	Topaz Award 3-5	School Library Journal Starred F	ALA Booklist (2/1/25) This light a
978-0-500-65384-5	The Secret World of Spiderwebs	Beccaloni, Jan	ES	Topaz Award 3-5	ALA Booklist. Rather than a guid	Kirkus Reviews. Discover a world
978-1-662-68053-3	Tomatoes on Trial: The Fruit v. Vegetable Showdown	Metcalfe, Lindsey	ES	Topaz Award 3-5	ALA Booklist (6/1/25) Are tomat	Kirkus Reviews (4/1/25) An 1893
978-1-546-19935-9	DogMan: A Sprinkle in Time	Pilkey, Dav	ES	Next In Series	Kirkus Reviews (Starred Review	Publishers Weekly (Starred Review
978-0-06-332463-3	Just One Gift	Linda Sue Park	ES/MS		Booklist starred (April 1, 2026) V Grades 3-7. Ms. Chang assigns	Kirkus Reviews (March 15, 2026) A class of kids consider their com
978-1-53623-507-4	Fourteen ways of looking at jellyfish	Weatherford, Carole Bos	ES		Booklist starred (April 1, 2026) V Grades 1-3. Meet the Medusoz	Kirkus Reviews starred (January This inspiring meditation on ancie
978-0-06-236431-9	Stubby : a pencil's journey	Mallery, Sydra	ES		Kirkus Reviews (April 15, 2026) A pencil's origin story, as told by	School Library Journal (April 1, 20 Gr 1-3-Stubby's journey begins as
978-1-54612-611-9	Sleepless	Gordan Korman	ES/MS		Kirkus Reviews (May 1, 2026) Mickey Prima looks like any othe	School Library Journal Xpress sta Gr 4-6-When five seventh graders
978-1-464-26710-9	The Academy	Layton, T. Z.	ES/MS	1st in SERIES	School Library Journal From 10/03/2025 Copyright 202	Kirkus Reviews Challenges on and off the field av
978-1-464-26714-7	The Journey Continues	Layton, T. Z.	ES/MS	SEQUEL TO <i>THE ACADEMY</i> . Annotati		
978-1-464-26718-5	Tournament of Champions	Layton, T. Z.	ES/MS	3RD IN SERIES: Now a New York Times		
978-1-464-26722-2	Title Fight	Layton, T. Z.	ES/MS	4TH IN SERIES: Annotation...When twe		
978-1-464-26829-8	Cup of Nations	Layton, T. Z.	ES/MS	5TH IN SERIES: Now a New York Times		
978-1-464-26833-5	Rise of the Scorpions	Layton, T. Z.	ES/MS	6TH IN SERIES: Annotation...Will Leo gr		
978-1-665-96114-1	Yarn Is Everything!	Aaron Reynolds	ES		ALA Booklist (6/1/26) Reynolds and Brown craft anoth	Kirkus Reviews Obsession claims an unlikely vict
978-1-665-99076-9	The Case of Old MacDonald and His Farm	Mark Teague	ES		Kirkus Reviews There are strange doings at Old	Publishers Weekly Moove over, Law and Order—a d
978-1-665-98859-9	Monsters are the Worst	Willan, Alex	ES		Kirkus Reviews The Worst! series resumes with	School Library Journal PreS-Gr 3— Gilbert the Goblin is
978-1-665-96114-1	Yarn Is Everything!	Reynolds, Aaron	ES		ALA Booklist (6/1/26) Reynolds and Brown craft anoth	Kirkus Reviews Obsession claims an unlikely vict

ISBN	Title	Author	ES/MS/HS	Notes (if needed)	Review #1	Review #2
978-0-593-80990-7; 0-593-80990-4	The Poisoned King	Rundell, Katherine	MS		School Library Journal Gr 6 Up	Horn Book From November/December
1-62010-974-3; 978-1-62010-974-8	Sheets (Sheets Series, Book 1)	Thummler, Brenna	ES/MS		Publishers Weekly (8/13/18) Ma	School Library Journal (May 1, 20
1-63715-289-2; 978-1-63715-289-8	Delicates (Sheets Series, Book 2)	Thummler, Brenna	ES/MS		Booklist (February 1, 2021 (Vol.	Kirkus Reviews (January 1, 2021)
1-63715-640-5; 978-1-63715-640-7	Lights (Sheets Series, Book 3)	Thummler, Brenna	ES/MS	Next in series	Will Eisner Comic Industry Award	Best Books List: Kids Favorites, 2
0-06-309481-9; 978-0-06-309481-9	Shad Hadid and the Alchemists of Alexandria	Jreije, George	ES/MS		Booklist (November 1, 2022 (Vo	Kirkus Reviews (August 15, 2022)
1-250-36532-5; 978-1-250-36532-3	Auntie Q's Golden Claws Nail Salon	Hoang, Van	ES/MS		School Library Journal Starred F From 03/01/2026 Copyright 202	Horn Book From May/June 2026 Copyright T
0-500-65384-4; 978-0-500-65384-5	The Secret World of Spiderwebs	Beccaloni, Jan	ES/MS		Kirkus Reviews Discover a world of web-weaver	School Library Journal From 11/14/2025 Copyright 2025
1-419-75436-X; 78-1-419-75436-4	Dragonflies of Glass: The Story of Clara Driscoll and the Tiffany Girls	Rubin, Susan Goldman	ES/MS		ALA Booklist (11/1/24) Growing up on her family's farm	School Library Journal From 02/01/2025 Copyright 2025
1-546-13585-5; 978-1-546-13585-2	Fighter in the Woods: The True Story of a Jewish Girl Who Joined the Partisans in World War II	Greene, Joshua M.	MS		ALA Booklist (2/1/25) A complement to Greene's previ	School Library Journal From 01/01/2025 Copyright 2025
Publisher: 1-7729-4344-4 Perma-Bound: 0-8479-1179-9; Publisher: 978-1-7729-4344-3 Perma-Bound: 978-0-8479-1179-0	Charles M. Schulz: The Creator of Snoopy and Peanuts	Kuki, Yuzuru	MS		ALA Booklist (10/1/24) This authorized manga biograph	School Library Journal From 10/01/2024 Copyright 2024
Publisher: 1-339-04244-4 Perma-Bound: 0-8479-1389-9; Publisher: 978-1-339-04244-2 Perma-Bound: 978-0-8479-1389-3	Wish I Was a Baller	Shah, Amar	MS		School Library Journal Starred F From 06/01/2025 Copyright 202	Kirkus Reviews In this graphic memoir by sports j
1-506-26382-8; 978-1-506-26382-3	American Sign Language: A Comprehensive Guide to ASL 1 and 2 with Online Video Practice	Stewart, David A.	ES/MS	Student request for ASL book		
Publisher: 0-06-328443-X Perma-Bound: 0-8479-1368-6; Publisher: 978-0-06-328443-2 Perma-Bound: 978-0-8479-1368-8	The Nine Moons of Han Yu and Luli	Glaser, Karina Yan	MS	Newberry Honor Book	Starred Review for Kirkus Review A boy in China in 731 C.E. and a	Starred Review for Publishers We Two tweens living in different time
Publisher: 1-250-34261-9 Perma-Bound: 0-8479-1336-8; Publisher: 978-1-250-34261-4 Perma-Bound: 978-0-8479-1336-7	A Sea of Lemon Trees: The Corrido of Roberto Alvarez	Águila, María Dolores	MS	Newberry Honor Book; Pura Belpre Win	School Library Journal Starred F From 10/31/2025 Copyright 202	Starred Review for Publishers We In this empowering verse novel, Á
1-536-22947-4; 978-1-536-22947-9	The Five Sides of Marjorie Rice: How to Discover a Shape	Alznauer, Amy	ES/MS	STEM/STEAM/Innovation	Starred Review ALA Booklist (1/ Starred Review A bright child in	Starred Review for Kirkus Review The story of an amateur mathema
1-629-44305-0; 978-1-629-44305-8	Climate: How Wladimir Koppen Studied Weather and Drew the First Climate Map	Pattison, Darcy	ES/MS	STEM/STEAM/Innovation	Kirkus Reviews A nonfiction children's book focu	
Publisher: 1-623-54480-7 Perma-Bound: 0-8479-2349-5; Publisher: 978-0-593-85647-5 Perma-Bound: 978-0-8479-2349-6	Just in Case: Saving Seeds in the Svalbard Global Seed Vault	Clendenan, Megan	ES/MS	STEM/STEAM/Innovation	School Library Journal Starred F	Horn Book
Publisher: 0-593-85647-3 Perma-Bound: 0-8479-2349-5; Publisher: 978-0-593-85647-5 Perma-Bound: 978-0-8479-2349-6	Oppenheimer and the Atomic Bomb: Young Readers Edition of AMERICAN PROMETHEUS	Bird, Kai and Sherwin, M	MS		Starred Review ALA Booklist (4/ Starred Review This superb ada	Kirkus Reviews A meticulous account of the rise a
Publisher: 1-646-14571-2 Perma-Bound: 0-8479-2349-5; Publisher: 978-0-593-85647-5 Perma-Bound: 978-0-8479-2349-6	Firesnake	Higuera, Donna Barba	MS		Starred Review for Kirkus Review In this trilogy closer, 13-year-old	ALA Booklist (4/1/26) The loosely tethered events of Th
Publisher: 0-06-348595-8 Perma-Bound: 0-8479-2349-5; Publisher: 978-0-593-85647-5 Perma-Bound: 978-0-8479-2349-6	The Second Life of Snap	Kelly, Erin Entrada	MS		School Library Journal Starred F From 02/27/2026 Copyright 202	Publishers Weekly A dictatorial regime's robot creati
1-250-26574-6; 978-1-250-26574-6	Diamond Fever!: A True Crime Story in the Wild West	Sheinkin, Steve	MS		School Library Journal Starred F From 03/01/2026 Copyright 202	Starred Review for Kirkus Review There are diamonds in those hills

ISBN	Title	Author	ES/MS/HS	Notes (if needed)	Review #1	Review #2
9781547604661	Defy the Night	Bigid Kemmerer	HS	We have book three of the series already	Publishers Weekly, 08/01/2021	Kirkus Review, 07/14/2021 The o
9781547613229	Defend the Dawn	Bigid Kemmerer	HS	We have book three of the series already	School Library Journal, 10/31/20	Kirkus Review, 06/30/2022 As the
9781974710027	Jujutsu Kaisen: 1	Gege Akutami	HS		Library Journal, 03/31/2020 In th	The Graphic Library 10/26/2020 I
9781974710034	Jujutsu Kaisen: 2	Gege Akutami	HS		The Graphic Library 1/22/2022 I	Lucien Welsh Archive 3/2/2020I n
9781974710041	Jujutsu Kaisen: 3	Gege Akutami	HS		The Graphic Library 7/20/2022 C	Caroline's Library Title: Jujutsu Ka

Belton Independent School District
Board of Trustee Meeting Agenda Item
September 21, 2026

Item: Resolution Adopting Authorized Broker/Dealer List

Contact Person: Melissa Lafferty

Presented for: ☒ Action ☐ Report Only

Supporting Documents: ☐ None ☒ Attached ☐ Provided Later

District Priority or Strategic Objective:

Priority 4: Fiscal Management – Maximize student experiences through transparent, strategic, and sustainable fiscal management.

Background Information:

In accordance with the Public Funds Investment Act, Texas Government Code 2256.025, the Board of Trustees must adopt a list of qualified brokers that are authorized to engage in investment transactions with the district.

The District has consulted with Meeder Public Funds to assist in maintaining the broker list and these firms shall submit documentation as required by Board Policy CDA(LEGAL) attesting that they (1) have received and reviewed the District's investment policy and (2) acknowledged that they have implemented reasonable procedures and controls in an effort to preclude investment transactions conducted between the District and the organization that are not authorized by the District's policy.

Fiscal Implications:

None.

Administrative Recommendation(s):

Approve the resolution for the authorized broker/dealer list as presented.

**A RESOLUTION OF THE BOARD OF TRUSTEES OF THE
BELTON INDEPENDENT SCHOOL DISTRICT**

**STATE OF TEXAS §
COUNTY OF BELL §**

WHEREAS, Public Funds Investment Act (Texas Government Code, Chapter 2256) governs local government investment; and

WHEREAS, the Public Fund Investment Act (Section 2256.025) requires the governing body or its designated investment committee, no less than annually, to review, revise and adopt a list of qualified brokers/dealers authorized to engage in investment transactions; and

WHEREAS, the following broker/dealers are recommended for approval:

NOW, THEREFORE, BE IT RESOLVED

Bank of America/Merrill Lynch	Multi-Bank Securities
Barclays Capital Inc.	Oppenheimer
BMO Capital Markets	Piper Sandler & Co
BNY Capital Markets	PNC Capital Markets LLC
BOK Financial	Raymond James
Cantor Fitzgerald & Co.	RBC Securities
FHN Financial	Robert W. Baird
Goldman Sachs & Co.	Siebert Williams Shank
Hilltop Securities	Stifel Nicolaus
Jefferies	TD Securities
JPMorgan Securities	UBS Financial
Mizuho Securities	U.S. Bancorp Investments
Morgan Stanley	Wells Fargo

are authorized as brokers/dealers for the District.

In accordance with the Act and the Investment Policy, a copy of the Investment Policy will be sent to each broker/dealer on the list and resent whenever a material change is made to the Policy.

That the District has complied with the requirements of the Public Funds Investment Act and the list of authorized brokers/dealers is hereby adopted.

DULY PASSED AND APPROVED THIS 21st DAY OF SEPTEMBER 2026.

BELTON INDEPENDENT SCHOOL DISTRICT

Chris Flor
President – Board of Trustees

Rucker Preston
Secretary – Board of Trustees

Approved Broker/Dealer List 6/30/2026

Broker/Dealer

Academy Securities²
 Alamo Capital²
 Arbor Research & Trading, LLC
 Bank of America/Merrill Lynch¹
 Barclays Capital Inc.¹
 Blaylock Van, LLC²
 BMO Capital Markets¹
 BNY Capital Markets
 BOK Financial
 Brean Capital
 Cantor Fitzgerald & Co.¹
 CastleOak Securities²
 Citigroup Global Markets Inc¹
 D.A. Davidson
 Daiwa Capital Markets¹
 FHN Financial
 Goldman Sachs & Co.¹
 Great Pacific²
 Hilltop Securities
 Huntington Bank
 InspereX (formerly InCapital)
 Jane Street
 Jefferies¹
 JPMorgan Securities¹
 Keybank Capital Markets

Broker/Dealer

Loop Capital Markets²
 MarketAxess Corporation
 Mizuho Securities¹
 Moreton Capital Markets
 Morgan Stanley¹
 Multi-Bank Securities²
 Oppenheimer
 Piper Sandler & Co
 PNC Capital Markets LLC
 Raymond James
 RBC Securities¹
 Rice Financial
 Robert W. Baird
 Santander US Capital Markets¹
 Siebert Williams Shank²
 Stephens Inc
 Stifel Nicolaus
 StoneX Group Inc.
 TD Securities¹
 Truist Securities Inc.
 UBS Financial¹
 UMB Financial Services
 U.S. Bancorp Investments
 Wells Fargo¹

Note: Direct issuers of CP and CDs are considered to be approved counterparties if approved as an issuer.

1 Primary Government Securities Dealer

2 Minority, Woman owned, or Service Disabled-Veteran owned Enterprise

Important Disclosures

This list is current as of the effective date only and is subject to change without notice. This list is for informational purposes only, and may not be relied upon for any other purpose. The list does not imply counterparty approval for derivatives of any type. This information is confidential and may not be distributed without prior written consent of Meeder Public Funds, Inc.

Belton Independent School District
Board of Trustee Meeting Agenda Item
September 21, 2026

Item: Annual Investment Report for 2025-2026

Contact Person: Melissa Lafferty

Presented for: ☒ Action ☐ Report Only

Supporting Documents: ☐ None ☒ Attached ☐ Provided Later

District Priority or Strategic Objective:

Priority 4: Fiscal Management – Maximize student experiences through transparent, strategic, and sustainable fiscal management.

Background Information:

In accordance with the Public Funds Investment Act, Government Code Chapter 2256.023, the investment officer shall prepare and submit an investment report not less than quarterly to the board. Quarterly investment reports have been approved by the board over the course of the year. The annual investment report is presented for board approval.

Fiscal Implications:

District funds are invested in accordance with state law and local policy.

Administrative Recommendation(s):

Approve the annual investment report as presented.

BELTON ISD

Annual Investment Report

AS OF AUGUST 31, 2026



MEEDER

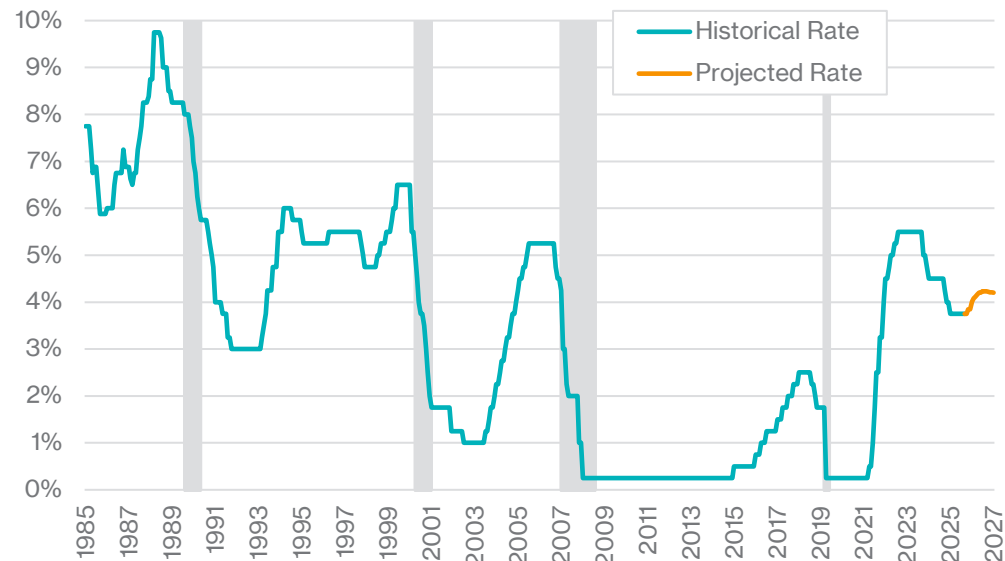
PUBLIC FUNDS



- Fed Chair Warsh said financial conditions are accommodative, but inflation is too high
- Interest rates across the yield curve were mixed for July and higher year to date
- Labor market data continued its general “no hire, no fire” posture, low unemployment
- The 30-year U.S. Treasury bond hit its highest rate in 19 years on debt/inflation worries

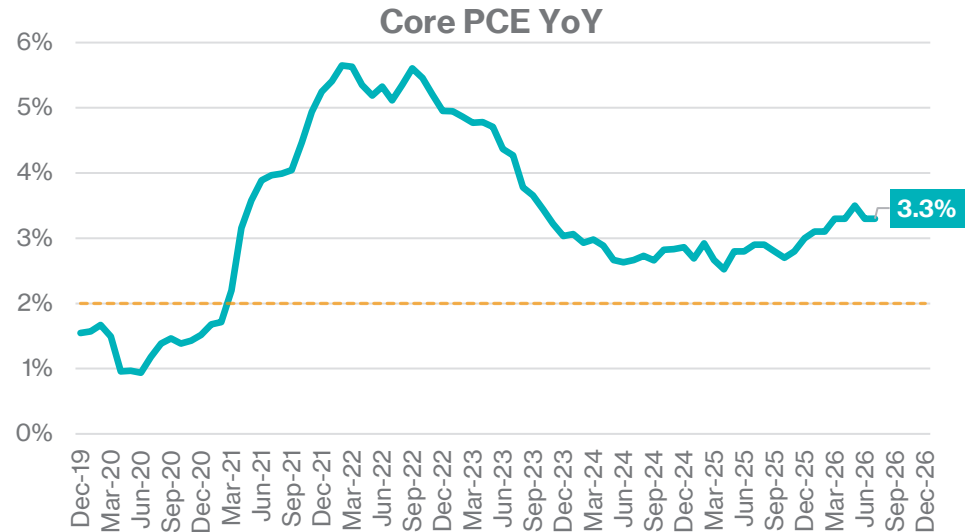
- The Fed has lowered the Fed Funds rate by 1.75% this cycle from 5.5% to 3.75%.
- At the end of August, the futures market was pricing in about two .25% hikes by the end of 2027.
- In contrast, at the end of February (right before the Iran conflict started), the futures market was pricing in about two .25% Fed cuts by the end of 2026.

Fed Funds History and Futures' Projection



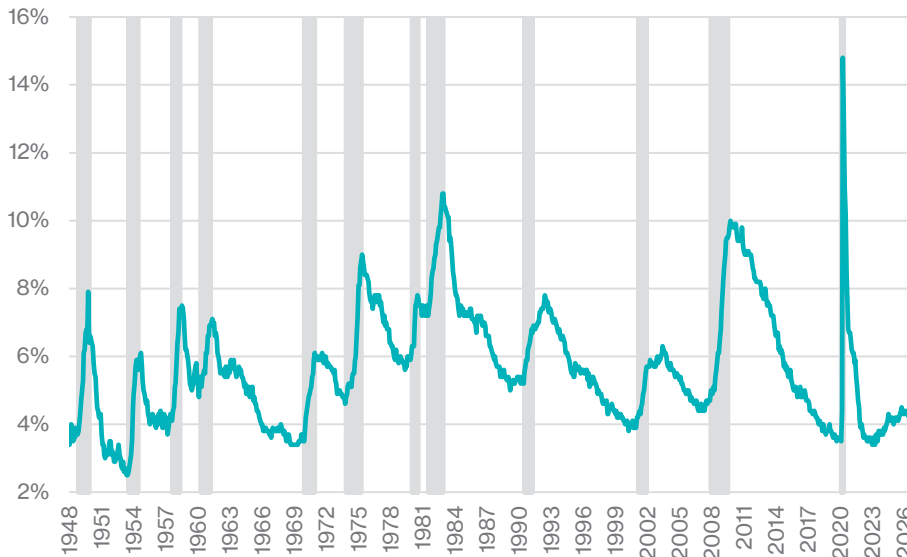
- Core Personal Consumption Expenditure YoY is the Fed's preferred inflation gauge.
- Core excludes food and energy components.
- It's been above the Fed's 2% target for 64 consecutive months.
- Economists expect Core PCE YoY to remain above the Fed's target for the foreseeable future.

SOURCE: BLOOMBERG



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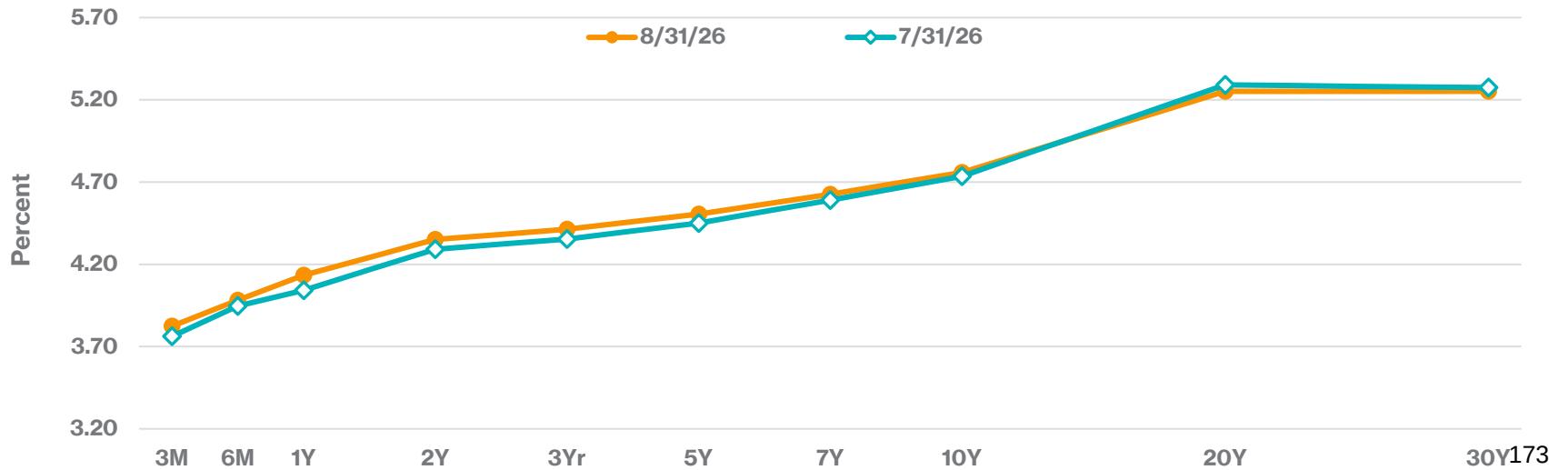
U.S. Unemployment Rate



- The current unemployment rate of 4.1% has declined slightly from earlier this year and remains low by historical standards.
- The Federal Reserve's NAIRU (Non-Accelerating Inflation Rate of Unemployment) is the lowest percentage of unemployment that an economy can have before inflation starts to speed up.
- 4.2% is the median long-run estimate of the NAIRU.

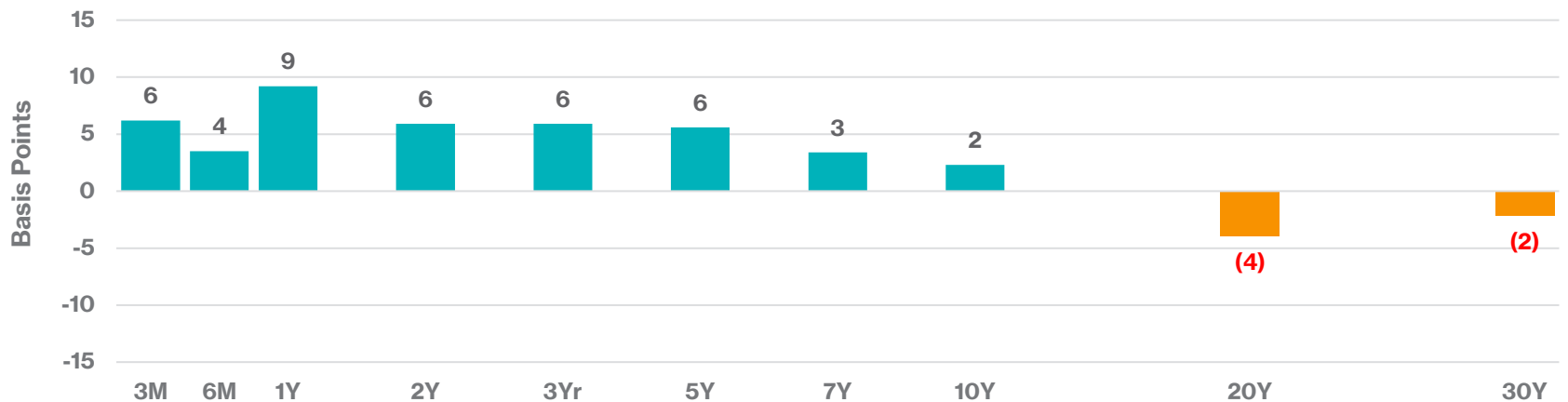
SOURCE: BLOOMBERG, FEDERAL RESERVE

U.S. Treasury Yield Curve Change



SOURCES: BLOOMBERG

Basis Point Change



SOURCES: BLOOMBERG



Portfolio Statistics

3.42

Weighted Average Yield to Maturity

0.00

Weighted Average Maturity (Years)

0.00

Portfolio Effective Duration (Years)

0.00

Weighted Average Life (Years)

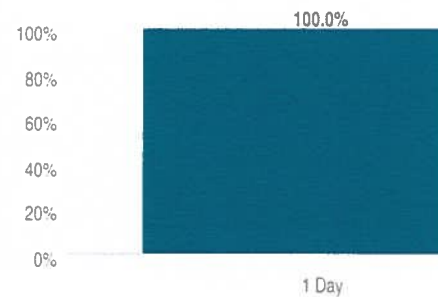
AAA

Average Credit Rating

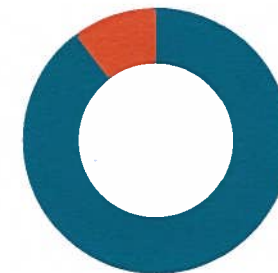
Portfolio Position

Par Value	\$79,589,470
Principal Cost	\$79,589,470
Book Value	\$79,589,470
Market Value	\$79,589,470
Unrealized Gain/Loss	\$0 ₁₇₄
Accrued Interest	\$0

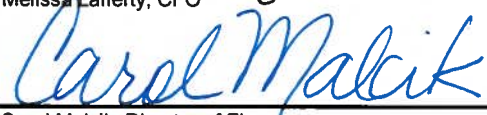
Maturity Distribution



Sector Allocation




Melissa Lafferty, CFO


Carol Malcik, Director of Finance

9.10.26
Date

9.10.26
Date

Portfolio Summary

This report is prepared in compliance with the Investment Policy and the Strategy of this entity and the Public Funds Investment Act (Chapter 2256, Texas Government Code).

Portfolio as of August 31, 2025

BEGINNING BOOK VALUE	\$94,844,082.04
BEGINNING MARKET VALUE	\$94,844,082.04
UNREALIZED GAIN/(LOSS)	\$0.00
WEIGHTED AVERAGE MATURITY (YEARS)	0.00
WEIGHTED AVERAGE YIELD	4.17

Portfolio as of August 31, 2026

ENDING BOOK VALUE	\$79,589,470.13
ENDING MARKET VALUE	\$79,589,470.13
INVESTMENT INCOME FOR THE PERIOD	\$3,804,155.02
UNREALIZED GAIN/(LOSS)	\$0.00
CHANGE IN UNREALIZED GAIN/(LOSS)	\$0.00
WEIGHTED AVERAGE MATURITY (YEARS)	0.00
WEIGHTED AVERAGE YIELD	3.42

Portfolio Overview

SECURITY TYPE	PAR VALUE	MARKET VALUE	BOOK VALUE	% OF PORTFOLIO	DAYS TO MATURITY	YIELD
LGIP	71,300,380.22	71,300,380.22	71,300,380.22	89.59%	1	3.82
Money Market Funds	8,289,089.91	8,289,089.91	8,289,089.91	10.41%	1	0.00
TOTAL	79,589,470.13	79,589,470.13	79,589,470.13	100.00%	1	3.42

CASH AND ACCRUED INTEREST

Purchased Accrued Interest		0.00	0.00			
TOTAL CASH AND INVESTMENTS	79,589,470.13	79,589,470.13	79,589,470.13		1	3.42

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TOTAL EARNINGS

	CURRENT PERIOD	FISCAL YEAR TO DATE
	3,804,155.02	3,804,155.02



Summary by Type

SECURITY TYPE	# OF SECURITIES	PAR VALUE	BOOK VALUE	% OF PORTFOLIO	YIELD	DAYS TO FINAL MATURITY
2022 BOND FUND						
LGIP	3	8,749,743.62	8,749,743.62	10.99	3.82	1
Money Market Funds	1	385,860.16	385,860.16	0.48	0.00	1
TOTAL	4	9,135,603.78	9,135,603.78	11.48	3.66	1
2026 BOND FUND						
LGIP	1	6,100,889.71	6,100,889.71	7.67	3.86	1
TOTAL	1	6,100,889.71	6,100,889.71	7.67	3.86	1
CONSTRUCTION FUNDS						
Money Market Funds	1	462.00	462.00	0.00	0.00	177
TOTAL	1	462.00	462.00	0.00	0.00	1
DEBT SERVICE FUNDS						
LGIP	3	17,450,394.19	17,450,394.19	21.93	3.85	1
Money Market Funds	1	72,410.59	72,410.59	0.09	0.00	1
TOTAL	4	17,522,804.78	17,522,804.78	22.02	3.83	1
GENERAL FUND						
LGIP	6	38,999,352.70	38,999,352.70	49.00	3.80	1
Money Market Funds	2	7,830,357.16	7,830,357.16	9.84	0.00	1
TOTAL	8	46,829,709.86	46,829,709.86	58.84	3.17	1
GRAND TOTAL	18	79,589,470.13	79,589,470.13	100.00	3.42	1



Position Statement

CUSIP	DESCRIPTION	TRADE DATE SETTLE DATE	PAR VALUE	PRINCIPAL COST PURCHASED INTEREST	TOTAL COST	YIELD TO MATURITY	MATURITY DATE	DAYS TO MATURITY	MARKET PRICE MARKET VALUE	UNREALIZED GAIN/LOSS BOOK VALUE	% OF MV	MOODY'S S&P RATING
2022 BOND FUND												
LGIP												
LSCOP	Lone Star Invest Pool - Corp Overnight Plus Fund	08/31/2026 08/31/2026	3,286,123.47	3,286,123.47 0.00	3,286,123.47	3.89		1	1.00 3,286,123.47	0.00 3,286,123.47	4.13	AAA
TEXSTAR	TexSTAR	08/31/2026 08/31/2026	2,392,159.89	2,392,159.89 0.00	2,392,159.89	3.69		1	1.00 2,392,159.89	0.00 2,392,159.89	3.01	AAA
TXCLASS	Texas CLASS	08/31/2026 08/31/2026	3,071,460.26	3,071,460.26 0.00	3,071,460.26	3.86		1	1.00 3,071,460.26	0.00 3,071,460.26	3.86	AAA
LGIP TOTAL			8,749,743.62	8,749,743.62 0.00	8,749,743.62	3.82		1	1.00 8,749,743.62	0.00 8,749,743.62	10.99	AAA
MONEY MARKET FUNDS												
46-8635-0176	PNC Government Checking Account	08/31/2026 08/31/2026	385,860.16	385,860.16 0.00	385,860.16	0.00		1	1.00 385,860.16	0.00 385,860.16	0.48	178 NA
MONEY MARKET FUNDS TOTAL			385,860.16	385,860.16 0.00	385,860.16	0.00		1	1.00 385,860.16	0.00 385,860.16	0.48	NA
2022 BOND FUND TOTAL			9,135,603.78	9,135,603.78 0.00	9,135,603.78	3.66		1	9,135,603.78	0.00 9,135,603.78	11.48	AAA
2026 BOND FUND												
LGIP												
TXCLASS	Texas CLASS	08/31/2026 08/31/2026	6,100,889.71	6,100,889.71 0.00	6,100,889.71	3.86		1	1.00 6,100,889.71	0.00 6,100,889.71	7.67	AAA
LGIP TOTAL			6,100,889.71	6,100,889.71 0.00	6,100,889.71	3.86		1	1.00 6,100,889.71	0.00 6,100,889.71	7.67	AAA
2026 BOND FUND TOTAL			6,100,889.71	6,100,889.71 0.00	6,100,889.71	3.86		1	6,100,889.71	0.00 6,100,889.71	7.67	AAA
CONSTRUCTION FUNDS												
MONEY MARKET FUNDS												
49-4234-4745	PNC Corporate Busi- ness Account	08/31/2026 08/31/2026	462.00	462.00 0.00	462.00	0.00		1	1.00 462.00	0.00 462.00	0.00	NA NA
MONEY MARKET FUNDS TOTAL			462.00	462.00 0.00	462.00	0.00		1	1.00 462.00	0.00 462.00	0.00	NA
CONSTRUCTION FUNDS TOTAL			462.00	462.00 0.00	462.00	0.00		1	462.00	0.00 462.00	0.00	NA



Position Statement

CUSIP	DESCRIPTION	TRADE DATE SETTLE DATE	PAR VALUE	PRINCIPAL COST PURCHASED INTEREST	TOTAL COST	YIELD TO MATURITY	MATURITY DATE	DAYS TO MATURITY	MARKET PRICE MARKET VALUE	UNREALIZED GAIN/LOSS BOOK VALUE	% OF MV	MOODY'S S&P RATING
DEBT SERVICE FUNDS												
LGIP												
TEXSTAR	TexSTAR	08/31/2026 08/31/2026	2,542,547.34	2,542,547.34 0.00	2,542,547.34	3.69		1	1.00 2,542,547.34	0.00 2,542,547.34	3.19	AAA
TEXPRIME	TexPool Prime	08/31/2026 08/31/2026	6,363,655.50	6,363,655.50 0.00	6,363,655.50	3.85		1	1.00 6,363,655.50	0.00 6,363,655.50	8.00	AAA
LSCOP	Lone Star Invest Pool - Corp Overnight Plus Fund	08/31/2026 08/31/2026	8,544,191.35	8,544,191.35 0.00	8,544,191.35	3.89		1	1.00 8,544,191.35	0.00 8,544,191.35	10.74	AAA
LGIP TOTAL			17,450,394.19	17,450,394.19 0.00	17,450,394.19	3.85		1	1.00 17,450,394.19	0.00 17,450,394.19	21.93	AAA
MONEY MARKET FUNDS												179
49-4026-8128	PNC Corporate Busi- ness Account	08/31/2026 08/31/2026	72,410.59	72,410.59 0.00	72,410.59	0.00		1	1.00 72,410.59	0.00 72,410.59	0.09	NA NA
MONEY MARKET FUNDS TOTAL			72,410.59	72,410.59 0.00	72,410.59	0.00		1	1.00 72,410.59	0.00 72,410.59	0.09	NA
DEBT SERVICE FUNDS TOTAL			17,522,804.78	17,522,804.78 0.00	17,522,804.78	3.83		1	1.00 17,522,804.78	0.00 17,522,804.78	22.02	AAA

GENERAL FUND											
LGIP											
TEXSTAR	TexSTAR	08/31/2026 08/31/2026	8,646,709.42	8,646,709.42 0.00	8,646,709.42	3.69	1	1.00 8,646,709.42	0.00 8,646,709.42	10.86	AAA
TXCLASS	Texas CLASS	08/31/2026 08/31/2026	1.03	1.03 0.00	1.03	3.86	1	1.00 1.03	0.00 1.03	0.00	AAA
LSGO	Lone Star Invest Pool - Government Overnight	08/31/2026 08/31/2026	74.86	74.86 0.00	74.86	3.67	1	1.00 74.86	0.00 74.86	0.00	AAA
TEXPRIME	TexPool Prime	08/31/2026 08/31/2026	1,400,198.31	1,400,198.31 0.00	1,400,198.31	3.85	1	1.00 1,400,198.31	0.00 1,400,198.31	1.76	AAA
LSCOP	Lone Star Invest Pool - Corp Overnight Plus Fund	08/31/2026 08/31/2026	20,631,868.37	20,631,868.37 0.00	20,631,868.37	3.89	1	1.00 20,631,868.37	0.00 20,631,868.37	25.92	AAA
TEXPOOL	TexPool	08/31/2026 08/31/2026	8,320,500.71	8,320,500.71 0.00	8,320,500.71	3.70	1	1.00 8,320,500.71	0.00 8,320,500.71	10.45	AAA
LGIP TOTAL			38,999,352.70	38,999,352.70 0.00	38,999,352.70	3.80	1	1.00 38,999,352.70	0.00 38,999,352.70	49.00	AAA
MONEY MARKET FUNDS											

Position Statement

CUSIP	DESCRIPTION	TRADE DATE SETTLE DATE	PAR VALUE	PRINCIPAL COST PURCHASED INTEREST	TOTAL COST	YIELD TO MATURITY	MATURITY DATE	DAYS TO MATURITY	MARKET PRICE MARKET VALUE	UNREALIZED GAIN/LOSS BOOK VALUE	% OF MV	MOODY'S S&P RATING
49-4026-8136	PNC Corporate Business Account	08/31/2026 08/31/2026	4,447,111.67	4,447,111.67 0.00	4,447,111.67	0.00		1	1.00 4,447,111.67	0.00 4,447,111.67	5.59	NA NA
49-4026-8101	PNC Corporate Business Account	08/31/2026 08/31/2026	3,383,245.49	3,383,245.49 0.00	3,383,245.49	0.00		1	1.00 3,383,245.49	0.00 3,383,245.49	4.25	NA NA
MONEY MARKET FUNDS TOTAL			7,830,357.16	7,830,357.16 0.00	7,830,357.16	0.00		1	1.00 7,830,357.16	0.00 7,830,357.16	9.84	NA
GENERAL FUND TOTAL			46,829,709.86	46,829,709.86 0.00	46,829,709.86	3.17		1	46,829,709.86	0.00 46,829,709.86	58.84	AAA
GRAND TOTAL			79,589,470.13	79,589,470.13 0.00	79,589,470.13	3.42		1	79,589,470.13	0.00 79,589,470.13	100.00	AAA



Earnings by Fund

CUSIP	DESCRIPTION	ENDING PAR VALUE	BEGINNING BOOK VALUE	ENDING BOOK VALUE	FINAL MATURITY	COUPON RATE	YIELD	INTEREST EARNED	NET AMORTIZATION/ ACCRETION INCOME	NET REALIZED GAIN/LOSS	ADJUSTED INTEREST EARNINGS
2022 BOND FUND											
46-8635-0176	PNC Government Checking Account	385,860.16	149,794.45	385,860.16	08/31/2026	0.00	0.00	0.00	0.00	0.00	0.00
LSCOP	Lone Star Invest Pool - Corp Over-night Plus Fund	3,286,123.47	3,158,725.42	3,286,123.47	08/31/2026	0.00	3.89	127,398.05	0.00	0.00	127,398.05
TEXSTAR	TexSTAR	2,392,159.89	18,040,152.68	2,392,159.89	08/31/2026	5.30	3.69	352,007.21	0.00	0.00	352,007.21
TXCLASS	Texas CLASS	3,071,460.26	10,188,716.54	3,071,460.26	08/31/2026	0.00	3.86	282,723.72	0.00	0.00	282,723.72
TOTAL		9,135,603.78	31,537,389.09	9,135,603.78		1.39	3.66	762,128.98	0.00	0.00	762,128.98
2026 BOND FUND											
TXCLASS	Texas CLASS	6,100,889.71	0.00	6,100,889.71	08/31/2026	0.00	3.86	100,888.95	0.00	0.00	100,888.95
TOTAL		6,100,889.71	0.00	6,100,889.71		0.00	3.86	100,888.95	0.00	0.00	100,888.95
CONSTRUCTION FUNDS											
49-4234-4745	PNC Corporate Business Account	462.00	248.00	462.00	08/31/2026	0.00	0.00	0.00	0.00	0.00	0.00
49-5257-2338	PNC Corporate Business Account	0.00	619.09	0.00	08/31/2026	0.00	0.00	2.27	0.00	0.00	2.27
TEXPOOL	TexPool	0.00	10,668.23	0.00	08/31/2026	5.34	4.04	77.37	0.00	0.00	77.37
TOTAL		462.00	11,535.32	462.00		0.00	0.00	79.64	0.00	0.00	79.64
DEBT SERVICE FUNDS											
49-4026-8128	PNC Corporate Business Account	72,410.59	25,080.63	72,410.59	08/31/2026	0.00	0.00	0.00	0.00	0.00	0.00
LSCOP	Lone Star Invest Pool - Corp Over-night Plus Fund	8,544,191.35	4,512,959.78	8,544,191.35	08/31/2026	0.00	3.89	273,279.57	0.00	0.00	273,279.57
TEXPRIME	TexPool Prime	6,363,655.50	9,559,917.46	6,363,655.50	08/31/2026	4.50	3.85	556,207.57	0.00	0.00	556,207.57
TEXSTAR	TexSTAR	2,542,547.34	2,448,499.49	2,542,547.34	08/31/2026	5.30	3.69	94,047.85	0.00	0.00	94,047.85
TOTAL		17,522,804.78	16,546,457.36	17,522,804.78		2.40	3.83	923,534.99	0.00	0.00	923,534.99
GENERAL FUND											
49-4026-8101	PNC Corporate Business Account	3,383,245.49	2,912,984.39	3,383,245.49	08/31/2026	0.00	0.00	0.00	0.00	0.00	0.00
49-4026-8136	PNC Corporate Business Account	4,447,111.67	1,050,841.90	4,447,111.67	08/31/2026	0.00	0.00	0.00	0.00	0.00	0.00

Earnings by Fund

CUSIP	DESCRIPTION	ENDING PAR VALUE	BEGINNING BOOK VALUE	ENDING BOOK VALUE	FINAL MATURITY	COUPON RATE	YIELD	INTEREST EARNED	NET AMORTIZATION/ ACCRETION INCOME	NET REALIZED GAIN/LOSS	ADJUSTED INTEREST EARNINGS
LSCOP	Lone Star Invest Pool - Corp Over- night Plus Fund	20,631,868.37	19,680,043.70	20,631,868.37	08/31/2026	0.00	3.89	870,120.37	0.00	0.00	870,120.37
LSGO	Lone Star Invest Pool - Government Overnight	74.86	72.08	74.86	08/31/2026	0.00	3.67	2.78	0.00	0.00	2.78
TEXPOOL	TexPool	8,320,500.71	12,720,678.59	8,320,500.71	08/31/2026	5.34	3.70	746,974.46	0.00	0.00	746,974.46
TEXPRIME	TexPool Prime	1,400,198.31	1,284,870.24	1,400,198.31	08/31/2026	4.50	3.85	52,923.77	0.00	0.00	52,923.77
TEXSTAR	TexSTAR	8,646,709.42	9,099,208.34	8,646,709.42	08/31/2026	5.30	3.69	347,501.08	0.00	0.00	347,501.08
TXCLASS	Texas CLASS	1.03	1.03	1.03	08/31/2026	0.00	3.86	0.00	0.00	0.00	0.00
TOTAL		46,829,709.86	46,748,700.27	46,829,709.86		2.06	3.17	2,017,522.46	0.00	0.00	2,017,522.46
GRAND TOTAL		79,589,470.13	94,844,082.04	79,589,470.13		1.90	3.42	3,804,155.02	0.00	0.00	3,804,155.02

Disclosure

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Belton Independent School District
Board of Trustee Meeting Agenda Item
September 21, 2026

Item: Adult Meal Prices for 2026-2027

Contact Person: Melissa Lafferty

Presented for: ☒ Action ☐ Report Only

Supporting Documents: ☒ None ☐ Attached ☐ Provided Later

District Priority or Strategic Objective:

Priority 4: Fiscal Management – Maximize student experiences through transparent, strategic, and sustainable fiscal management.

Background Information:

USDA regulations require the district to evaluate and adjust meal prices annually. However, a positive balance in the School Nutrition Fund waives the need for student meal price increases this year, placing only adult meal prices under review. For districts operating non-pricing programs like the Community Eligibility Provision (CEP), Texas Department of Agriculture (TDA) and National School Lunch Program (NSLP) guidelines mandate the use of Method 2 to calculate adult meal prices.

Calculations are provided below:

Method 2 Lunch	
Federal Funds/Reimbursement Rate Categories	Amount BISD Receives
Free Reimbursement Rate	\$4.76
Performance-Based Reimbursement	\$0.09
Severe Need Lunch	\$0.02
USDA Foods	\$0.47
Total Federal Funds	\$5.34
Minimum Adult Charge	\$5.34

Method 2 Breakfast	
Federal Funds/Reimbursement Rate Categories	Amount BISD Receives
Free Reimbursement Rate	\$2.54
Severe Need Breakfast	\$0.51
USDA Foods	\$0.47
Total Federal Funds	\$3.52
Minimum Adult Charge	\$3.52

We recommend the adult lunch price be increased from \$5.25 to \$5.50 and adult breakfast price increase from \$3.50 to \$3.60 to potentially limit further increases and remain compliant with federal regulations.

Fiscal Implications:

To comply with the current pricing regulations, adult lunch and breakfast prices must increase.

Administrative Recommendation(s):

Approve the increase in adult meal prices as presented.

Belton Independent School District
Board of Trustee Meeting Agenda Item

September 21, 2026

Item: Certified T-TESS Appraisers for 2026-2027

Contact Person: Jennifer Ramirez

Presented for: Action ☒ Report Only ☐

Supporting Documents: None ☐ Attached ☒ Provided Later ☐

District Goal or Objective Addressed:

Priority 2: Staff - Attract, support, and retain exceptional educators and staff to ensure every student is guided and supported by an outstanding team.

Background Information:

In accordance with Policy DNA(LOCAL), the Board shall approve a list of certified Texas Teacher Evaluation and Support System (T-TESS) appraisers who can appraise a teacher in place of the teacher's supervisor.

Attached is a list of certified T-TESS appraisers for 2026-2027.

Fiscal Implications:

N/A

Administrative Recommendation(s):

Approve the attached list of certified T-TESS appraisers for 2026-2027 as presented.



Belton Independent School District

Department of Human Resources

P O Box 269*Belton, TX 76513*254-215-2015* Fax 254-215-2016

Jennifer Ramirez

Executive Director of Human Resources

Certified T-TESS Appraisers 2026-2027

Ayers, Denise
Babb, Cheyenne
Baggerly, Tammie
Bangsund, Staci
Barlow, Alexandra
Beaty, Melinda
Bernier, Angela
Blattner, Kristie
Braeuer, Erin
Brewer, Courtney
Bridge, Jacquelyn
Bulls, Laura
Carrasquillo, Paige
Cipolla, Akeiah
Cohagan, Candace
Combest, Elizabeth
Crook, Megan
Doughty, Katie
Dudley, Jana
Dunn, Shellie
Fitzsimmons, Matthew
Gibson, Felicia
Griffith, Holly
Hammonds, James
Hernandez, Loren
Holt, Brooke
Hughes, Amy
Itz, Brooke
Ivy, Deanna
Jimenez, Kelli
Jordan, Chelsea
Knox, Claudia

Linnane, Rebecca
Manley, J David
Martin, Rachelle
McVade, Bianca
Metzger, Michelle
Millington, Patrick
Newberry, Lexie
O'Dell, Lori
Otwell, Katie
Parsons, Barbara
Phillips, Jennifer
Pleasant, Courtney
Plemons, Neill
Poppenhusen, Allison
Ramirez, Rachel
Reynolds, Megan
Richardson, Lauryn
Ross, Amber
Sepulveda, Jose
Sewell, Sydnie
Sharp, Denise
Smith, Ben
Suman, Nicole
Surovik, Sheila
Tarrant, Angelia
Thomas, Ashlie
Thrash, Chanel
Toy, Mandy
Vaughn, Becky
White, Dominic
Younger, Debi
Yuengel, William

Belton Independent School District
Board of Trustee Meeting Agenda Item

September 21, 2026

Item: Class Size Waiver

Contact Person: Todd Schiller

Presented for: Action ☒ Report Only ☐

Supporting Documents: None ☐ Attached ☒ Provided Later ☐

District Priority or Strategic Objective:

Priority 2: Staff - Attract, support, and retain exceptional educators and staff to ensure every student is guided and supported by an outstanding team.

Background Information:

Each year the District is required to submit a waiver request to the Texas Education Agency for K-4 classrooms that exceed the 22:1 requirement. Many factors influence the District's ability to meet this requirement in K-4 classrooms. This year's class size waivers were impacted by a desire to keep students in their neighborhood schools to the extent possible, the arrangement of special programs on specific campuses and overall growth throughout the District. For these reasons, there is a need to request a class size waiver for the 2026-2027 school year. Currently there are 3 elementary classrooms that exceed the 22:1 ratio.

Fiscal Implications:

Approval of this waiver request allows the District the opportunity to be as fiscally efficient as possible when staffing for our elementary population.

Administrative Recommendation(s):

Approve class size waivers and authorize administration to pursue additional waivers throughout the school year when applicable.

2026-2027 BELTON ELEMENTARY CLASS SIZE WAIVERS SUBMITTED

Campus	K	1st	2nd	3rd	4th	Total
Pirtle	0	0	0	3	0	3
Total per Grade	0	0	0	3	0	3

Total Waivers to be Submitted 9/22/2026:	3
--	---

Belton Independent School District
Board of Trustee Meeting Agenda Item
September 21, 2026

Item: Superintendent Evaluation Instrument

Contact Person: Dr Malinda Golden

Presented for: ☒ Action ☐ Report Only

Supporting Documents: ☐ None ☒ Attached ☐ Provided Later

District Priority or Strategic Objective:

Priority 1: Students - Ensure exceptional learning experiences that bring our “Journey of a Graduate” to life for each and every student.

Priority 2: Staff - Attract, support, and retain exceptional educators and staff to ensure every student is guided and supported by an outstanding team.

Priority 3: Community - Grow meaningful engagement and partnerships with parents, staff, and community members in support of our shared vision for each and every learner.

Priority 4: Fiscal Management - Maximize student experiences through transparent, strategic, and sustainable fiscal management.

Background Information:

Board policies BJCD(LEGAL) and BJCD(LOCAL) call for the appraisal process of the superintendent to be mutually agreed upon by the Board and the superintendent. This local evaluation instrument meets the requirements of Board Policy and is requested for approved use in the 2026-2027 school year.

Fiscal Implications:

None.

Administrative Recommendation(s):

Approve the use of the draft superintendent evaluation instrument for the 2026-2027 school year as presented.



Belton ISD Superintendent Mid-Year Evaluation

Our Commitment to Our Community

Our Vision

Inspiring Dreams. Empowering Futures.

Our Mission

Empower each and every learner to pursue their dreams and enrich their communities.

Core Beliefs

- **Trust:** Trust is built through honesty, clear communication, and keeping our commitments.
- **Empowerment:** Empowerment is having ownership, being accountable, and leading with purpose.
- **Adaptability:** Adaptability is embracing change, being resilient, and celebrating achievements.
- **Community:** Community is cultivated through respect for others, meaningful engagement, and strong partnerships.
- **High Expectations:** High Expectations is the commitment to academic excellence, driven by innovation and a relentless focus on continuous improvement.

The Lens of Leadership: These values serve as the foundational lens through which all administrative and board leadership is evaluated. They act as the "North Star" for our *Destination 2031* journey, ensuring that every decision, policy, and instructional pivot remains anchored in the commitments we have made to our students, staff, and community. This mid-year reflection is more than a compliance milestone; it is a vital exercise in organizational alignment, ensuring our collaborative efforts remain true to these core principles.

Section 1: The "Team of 8" Partnership & Governance Alignment

The mid-year evaluation is a formative touchpoint specifically designed to strengthen the partnership between the Board of Trustees and the Superintendent. By engaging in this dialogue in January, the "Team of 8" can calibrate strategies, examine leading indicators of organizational health, and ensure the district remains on track to meet the ambitious milestones of the strategic plan.



Superintendent's Reflection & Cover Letter

[Insert Reflection / Cover Letter Here]

Our Governance Alignment & Team of 8 Commitment

This evaluation is conducted in accordance with 19 Tex. Admin. Code § 150.1031 and TEC § 21.354, which mandate an annual appraisal of the Superintendent. Belton ISD utilizes a collaborative governance approach that prioritizes formative progress monitoring and strategy calibration. Because final academic "Lag Data" (such as STAAR and EOC results) is not available until late spring/early summer, this mid-year session focuses on Lead Measures. These are the monthly and quarterly indicators that allow the Board to predict eventual success and adjust resources proactively.

Formative vs. Summative Evaluation Cycle

January (Formative)	April (Summative)
Focus: Lead Measures (Predictive)	Focus: Lag Measures (Outcome)
Purpose: Progress Monitoring & Calibration	Purpose: Final Appraisal & Performance Rating
Activity: Strategy Review & Operational Health	Activity: Final Goal Attainment & Growth Analysis

Section 2: Destination 2031 Strategic Priority Performance Matrices

To fulfill our promise to the Belton ISD community, our leadership actions are intentionally aligned with the four core priorities of our *Destination 2031* Strategic Plan. Below is the detailed tracking of all Lead Measures across our four strategic priorities, integrated directly from our Lead Measures Tracker.

- Priority 1: Students
 - Executive Status Breakdown:
(Example) ● 9 On Track | ● 2 Monitor | ● 4 Off Track (Total Lead Measures: 15)
 - Key Highlights & Celebrations:
 - Leading Metric Data & Progress Updates:
 - Operational Barriers & Strategic Actions:
 - Reflection:
- Priority 2: Staff
 - Executive Status Breakdown:
(Example) ● 8 On Track | ● 0 Monitor | ● 0 Off Track (Total Lead Measures: 8)



- Key Highlights & Celebrations:
- Leading Metric Data & Progress Updates:
- Operational Barriers & Strategic Actions:
- Reflection:
- Priority 3: Community
 - Executive Status Breakdown:
(Example) ● 6 On Track | ● 0 Monitor | ● 0 Off Track (Total Lead Measures: 6)
 - Key Highlights & Celebrations:
 - Leading Metric Data & Progress Updates:
 -
 - Operational Barriers & Strategic Actions:
 - Reflection:
- Priority 4: Financial Management
 - Executive Status Breakdown:
(Example) ● 7 On Track | ● 0 Monitor | ● 0 Off Track (Total Lead Measures: 7)
 - Key Highlights & Celebrations:
 - Leading Metric Data & Progress Updates:
 - Operational Barriers & Strategic Actions:
 - Reflection:



Section 3: Policy BJA(LOCAL) Leadership & Management Appraisal

Section 3 evaluates the "how" of leadership—the daily operational duties and executive behaviors defined in local policy.

Educational Leadership

Sample Duties: Establishing communication for decision-making; overseeing annual planning; monitoring health, safety, and counseling programs.

- **Evidence of Leadership:**
 - [Link artifact here]
- **Rating (Used in Final Evaluation):**
 - [] Exceeding (E)
 - [] Met (M)
 - [] Needs Improvement (N)

District Management

Sample Duties: Managing finances and operations; overseeing budget development based on district priorities; organizing staff for efficiency.

- **Evidence of Leadership:**
 - [Link artifact here]
- **Rating (Used in Final Evaluation):**
 - [] Exceeding (E)
 - [] Met (M)
 - [] Needs Improvement (N)

Board & Community Relations

Sample Duties: Keeping the Board informed; directing proactive communication; encouraging community and business involvement.

- **Evidence of Leadership:**
 - [Link artifact here]
- **Rating (Used in Final Evaluation):**
 - [] Exceeding (E)
 - [] Met (M)
 - [] Needs Improvement (N)



Section 4: HB 3 Interim Academic Progress Monitoring

The foundation of the district's long-term academic health rests on our performance in early childhood literacy, math, and College, Career, and Military Readiness (CCMR). These state-mandated goals are critical benchmarks for *Destination 2031*.

HB 3 Academic Progress Goals (For Final Evaluation)

Goal Area	2030 Target	2027 Results
Early Childhood Literacy (3rd Grade Reading)	[Target]	
Early Childhood Math (3rd Grade Math)	[Target]	
CCMR (College, Career, Military Readiness)	[Target]	

Instructional Improvements

To support these targets, I have overseen the following system improvements:

- [Insert Instructional Improvements]

Section 5: Summary, Feedback, and Attestation

This section concludes the mid-year evaluation process, ensuring alignment for the remainder of the 2026-2027 academic year.

Board Feedback:

Signatures

By signing below, the parties attest that the formative mid-year evaluation conference was held and the contents of this document were discussed.

Board President Signature: _____ Date: _____

Superintendent Signature: _____ Date: _____

Belton Independent School District
Board of Trustee Meeting Agenda Item

September 21, 2026

Item: Policy Update 127 – 2nd Reading

Contact Person: Dr. Malinda Golden

Presented for: ☒ Action ☐ Report Only

Supporting Documents: ☐ None ☒ Attached ☐ Provided Later

District Priority or Strategic Objective:

Priority 1: Students - Ensure exceptional learning experiences that bring our “Journey of a Graduate” to life for each and every student.

Priority 3: Community - Grow meaningful engagement and partnerships with parents, staff, and community members in support of our shared vision for each and every learner.

Priority 4: Fiscal Management - Maximize student experiences through transparent, strategic, and sustainable fiscal management.

Background Information:

Below are the final 3 (LOCAL) policies from Policy Update 127 that underwent 1st reading at the Policy Committee Meeting on September 9, 2026.

1. CAA(LOCAL) - FISCAL MANAGEMENT GOALS AND OBJECTIVES:
FINANCIAL ETHICS
2. EHBB(LOCAL) - SPECIAL PROGRAMS: GIFTED AND TALENTED
STUDENTS
3. FFF(LOCAL) - STUDENT WELFARE: STUDENT SAFETY (SB 571)

Fiscal Implications:

None.

Administrative Recommendation(s):

The Administration recommends that the Board approve the revised (LOCAL) policies as presented.

FISCAL MANAGEMENT GOALS AND OBJECTIVES
FINANCIAL ETHICS

CAA
(LOCAL)

All Trustees, employees, vendors, contractors, agents, consultants, volunteers, and any other parties who are involved in the District's financial transactions shall act with integrity and diligence in duties involving the District's fiscal resources.

Note: See the following policies and/or administrative regulations regarding conflicts of interest, ethics, and financial oversight:

- Code of ethics:
 - for Board members — BBF
 - for employees — [DHDHA](#)
- Financial conflicts of interest:
 - for public officials — BBFA
 - for all employees — DBD
 - for vendors — CHE
- Compliance with state and federal grant and award requirements: CB, CBB
- Financial conflicts and gifts and gratuities regarding federal funds: CB, CBB
- Systems for monitoring the District's investment program: CDA
- Budget planning and evaluation: CE
- Compliance with accounting regulations: CFC
- Activity fund management: CFD
- Criminal history record information for employees: DBAA, DC
- Disciplinary action for fraud by employees: DCD, DCE, and DF series

Fraud and Financial Impropriety

The District prohibits fraud and financial impropriety, as defined below, in the actions of its Trustees, employees, vendors, contractors, agents, consultants, volunteers, and others seeking or maintaining a business relationship with the District.

Definition

Fraud and financial impropriety shall include but not be limited to:

1. Forgery or unauthorized alteration of any document or account belonging to the District.
2. Forgery or unauthorized alteration of a check, bank draft, or any other financial document.

FISCAL MANAGEMENT GOALS AND OBJECTIVES
FINANCIAL ETHICS

CAA
(LOCAL)

3. Misappropriation of funds, securities, supplies, or other District assets, including employee time.
4. Impropriety in the handling of money or reporting of District financial transactions.
5. Profiteering as a result of insider knowledge of District information or activities.
6. Unauthorized disclosure of confidential or proprietary information to outside parties.
7. Unauthorized disclosure of investment activities engaged in or contemplated by the District.
8. Accepting or seeking anything of material value from contractors, vendors, or other persons providing services or materials to the District, except as otherwise permitted by law or District policy. [See CB, DBD]
9. Inappropriately destroying, removing, or using records, furniture, fixtures, or equipment.
10. Failure to provide financial records required by federal, state, or local entities.
11. Failure to disclose conflicts of interest as required by law or District policy.
12. Any other dishonest act regarding the finances of the District.
13. Failure to comply with requirements imposed by law, the awarding agency, or a pass-through entity for state and federal awards.

**Financial Controls
and Oversight**

Each employee who supervises or prepares District financial reports or transactions shall set an example of honest and ethical behavior and shall actively monitor his or her area of responsibility for fraud and financial impropriety.

Fraud Prevention

The Superintendent shall maintain a system of internal controls to deter and monitor for fraud or financial impropriety in the District.

Reports

Any person who suspects fraud or financial impropriety in the District shall report the suspicions immediately to a person with authority to investigate the suspicions, including any supervisor, the Superintendent, the Board President, or local law enforcement.

Reports of suspected fraud or financial impropriety shall be treated as confidential to the extent permitted by law. Limited disclosure may be necessary to complete a full investigation or to comply with

FISCAL MANAGEMENT GOALS AND OBJECTIVES
FINANCIAL ETHICS

CAA
(LOCAL)

	law. All employees involved in an investigation shall be advised to keep information about the investigation confidential.
<i>Protection from Retaliation</i>	Neither the Board nor any District employee shall unlawfully retaliate against a person who in good faith reports perceived fraud or financial impropriety. [See DG]
Fraud Investigations	In coordination with legal counsel and other internal or external departments or agencies, as appropriate, the Superintendent, Board President, or a designee shall promptly investigate reports of potential fraud or financial impropriety.
Response	If an investigation substantiates a report of fraud or financial impropriety, the Superintendent shall promptly inform the Board of the report, the investigation, and any responsive action taken or recommended by the administration. If an employee is found to have committed fraud or financial impropriety, the Superintendent shall take or recommend appropriate disciplinary action, which may include termination of employment. If a contractor or vendor is found to have committed fraud or financial impropriety, the District shall take appropriate action, which may include cancellation of the District's relationship with the contractor or vendor. When circumstances warrant, the Board, Superintendent, or a designee may refer matters to appropriate law enforcement or regulatory authorities. In cases involving monetary loss to the District, the District may seek to recover lost or misappropriated funds. The final disposition of the matter and any decision to file a criminal complaint or to refer the matter to the appropriate law enforcement or regulatory agency for independent investigation shall be made in consultation with legal counsel.
Federal Awards Disclosure	In connection with federal awards, the District shall promptly disclose in writing whenever the District has credible evidence of the commission of a violation of federal criminal law involving fraud, conflict of interest, bribery, or gratuity violations found in federal law, including the Civil False Claims Act. This provision applies to any activities or subawards of a federal award. [See CBB]
Analysis of Fraud	After any investigation substantiates a report of fraud or financial impropriety, the Superintendent shall analyze conditions or factors that may have contributed to the fraudulent or improper activity. The Superintendent shall ensure that appropriate administrative procedures are developed and implemented to prevent future misconduct. These measures shall be presented to the Board for review.

FISCAL MANAGEMENT GOALS AND OBJECTIVES
FINANCIAL ETHICS

CAA
(LOCAL)

All Trustees, employees, vendors, contractors, agents, consultants, volunteers, and any other parties who are involved in the District's financial transactions shall act with integrity and diligence in duties involving the District's fiscal resources.

Note: See the following policies and/or administrative regulations regarding conflicts of interest, ethics, and financial oversight:

- Code of ethics:
 - for Board members — BBF
 - for employees — DHA
 - Financial conflicts of interest:
 - for public officials — BBFA
 - for all employees — DBD
 - for vendors — CHE
 - Compliance with state and federal grant and award requirements: CB, CBB
 - Financial conflicts and gifts and gratuities regarding federal funds: CB, CBB
 - Systems for monitoring the District's investment program: CDA
 - Budget planning and evaluation: CE
 - Compliance with accounting regulations: CFC
 - Activity fund management: CFD
 - Criminal history record information for employees: DBAA, DC
 - Disciplinary action for fraud by employees: DCD, DCE, and DF series
-

**Fraud and Financial
Impropriety**

The District prohibits fraud and financial impropriety, as defined below, in the actions of its Trustees, employees, vendors, contractors, agents, consultants, volunteers, and others seeking or maintaining a business relationship with the District.

Definition

Fraud and financial impropriety shall include but not be limited to:

1. Forgery or unauthorized alteration of any document or account belonging to the District.
2. Forgery or unauthorized alteration of a check, bank draft, or any other financial document.

FISCAL MANAGEMENT GOALS AND OBJECTIVES
FINANCIAL ETHICS

CAA
(LOCAL)

3. Misappropriation of funds, securities, supplies, or other District assets, including employee time.
4. Impropriety in the handling of money or reporting of District financial transactions.
5. Profiteering as a result of insider knowledge of District information or activities.
6. Unauthorized disclosure of confidential or proprietary information to outside parties.
7. Unauthorized disclosure of investment activities engaged in or contemplated by the District.
8. Accepting or seeking anything of material value from contractors, vendors, or other persons providing services or materials to the District, except as otherwise permitted by law or District policy. [See CB, DBD]
9. Inappropriately destroying, removing, or using records, furniture, fixtures, or equipment.
10. Failure to provide financial records required by federal, state, or local entities.
11. Failure to disclose conflicts of interest as required by law or District policy.
12. Any other dishonest act regarding the finances of the District.
13. Failure to comply with requirements imposed by law, the awarding agency, or a pass-through entity for state and federal awards.

**Financial Controls
and Oversight**

Each employee who supervises or prepares District financial reports or transactions shall set an example of honest and ethical behavior and shall actively monitor his or her area of responsibility for fraud and financial impropriety.

Fraud Prevention

The Superintendent shall maintain a system of internal controls to deter and monitor for fraud or financial impropriety in the District.

Reports

Any person who suspects fraud or financial impropriety in the District shall report the suspicions immediately to a person with authority to investigate the suspicions, including any supervisor, the Superintendent, the Board President, or local law enforcement.

Reports of suspected fraud or financial impropriety shall be treated as confidential to the extent permitted by law. Limited disclosure may be necessary to complete a full investigation or to comply with

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FINANCIAL ETHICS

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SPECIAL PROGRAMS
GIFTED AND TALENTED STUDENTS

EHBB
(LOCAL)

Referral

Students may be referred for the gifted and talented program at any time by teachers, school counselors, parents, or other interested persons.

Screening and
Identification
Process

The District shall provide assessment opportunities to complete the screening and identification process for referred students at least once per school year.

The District shall schedule a gifted and talented program awareness session for parents that provides an overview of the identification procedures and services for the program prior to beginning the screening and identification process.

Parental Consent

The District shall obtain written parental consent before any special testing or individual assessment is conducted as part of the screening and identification process. All student information collected during the screening and identification process shall be an educational record, subject to the protections set out in policies at FL.

Selection

Identification
Criteria

The Board-approved program for the gifted and talented shall establish criteria to identify gifted and talented students. The criteria shall be specific to the state definition of gifted and talented and shall ensure the fair assessment of students with special needs, such as the culturally different, the economically disadvantaged, and students with disabilities.

Assessments

Data collected through both objective and subjective assessments shall be measured against the criteria approved by the Board to determine individual eligibility for the program. Assessment tools may include, but are not limited to, the following: achievement tests, intelligence tests, creativity tests, behavioral checklists completed by teachers and parents, student/parent conferences, and available student work products.

Selection Matrix
or Threshold
System

If the selection process relies on a matrix or threshold system, the use of a scoring value based on race, ethnicity, sex, socioeconomic status, or disability shall be prohibited.

Placement
Committee

A placement committee shall evaluate each referred student according to the established criteria and shall identify those students for whom placement in the gifted and talented program is the most appropriate educational setting. The committee shall be composed of at least three professional educators who have received training in the nature and needs and identification of gifted students, as required by law.

Notification

The District shall provide written notification to parents of students who qualify for services through the District's gifted and talented program. Participation in any program or services provided for

SPECIAL PROGRAMS
GIFTED AND TALENTED STUDENTS

EHBB
(LOCAL)

gifted students shall be voluntary, and the District shall obtain written permission from the parents before placing a student in a gifted and talented program.

Reassessment

If the District reassesses students in the gifted and talented program, the reassessment shall be based on a student's performance in response to services and shall occur no more than once in elementary grades, once in middle school grades, and once in high school grades.

Transfer Students

Interdistrict

When a student identified as gifted by a previous school district enrolls in the District, the placement committee shall review the student's records and conduct assessment procedures when necessary to determine if placement in the District's program for gifted and talented students is appropriate.

[See FDD(LEGAL) for information regarding transfer students and the Interstate Compact on Educational Opportunities for Military Children]

Intradistrict

A student who transfers from one campus in the District to the same grade level at another District campus shall continue to receive services in the District's gifted and talented program.

Furloughs

The District may place on a furlough any student who is unable to maintain satisfactory performance or whose educational needs are not being met within the structure of the gifted and talented program. A furlough may be initiated by the District, the parent, or the student.

In accordance with the Board-approved program, a furlough shall be granted for specified reasons and for a specified period of time. At the end of a furlough, the student may reenter the gifted and talented program, be placed on another furlough, or be exited from the program.

Exit Provisions

The District shall monitor student performance in response to gifted and talented program services. If at any time the placement committee or a parent determines the program is not meeting the student's educational needs, the committee shall meet with the parent and student before finalizing an exit decision.

Appeals

A parent, student, or educator may appeal any final decision of the placement committee regarding services in the gifted and talented program. Appeals shall be made first to the placement committee. Any subsequent appeals shall be made in accordance with FNG(LOCAL) beginning at Level Two.

Program Evaluation

The District shall annually evaluate the effectiveness of the District's gifted and talented program, and the results of the evaluation

SPECIAL PROGRAMS
GIFTED AND TALENTED STUDENTS

EHBB
(LOCAL)

shall be used to modify and update the District and campus improvement plans. The District shall include parents in the evaluation process and shall share the information with Board members, administrators, teachers, school counselors, students in the gifted and talented program, and the community.

Funding

The Superintendent shall develop administrative procedures to ensure that 100 percent of the state funds allocated for the gifted and talented program are spent providing [for](#) and enhancing the District's program and that a method accounting for expenditures related to the gifted and talented program is established and aligns with the Texas Education Agency's financial compliance guidance.

**Community
Awareness**

The District shall ensure that information about the District's gifted and talented program is available to parents and community members and that they have an opportunity to develop an understanding of and support for the program.

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GIFTED AND TALENTED STUDENTS

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Note: See policies DHB and DHC for information on other required reports regarding alleged misconduct against a student.

The District shall notify a parent of a student with whom a District employee or a person acting as a service provider for the District is alleged to have engaged in misconduct, informing the parent:

1. As soon as feasible that the alleged misconduct may have occurred;
2. Whether the individual was terminated following an investigation of the alleged misconduct or resigned before completion of the investigation; and
3. Whether a report was submitted to the Texas Education Agency or State Board for Educator Certification concerning the alleged misconduct.

For purposes of this policy, misconduct is defined as an individual's:

1. Alleged abuse or commission of an otherwise unlawful act with a student;
2. Involvement in or soliciting a romantic relationship, or soliciting or engaging in sexual contact, with a student;
3. Engaging in inappropriate communications with a student; or
4. Failing to maintain appropriate boundaries with a student.

**Notice of Suspected
Criminal Offense**

Except as provided by state law regarding child abuse investigations, the District shall notify a parent not later than one business day after the date an employee first suspects that a criminal offense has been committed against the parent's child.

[See also FFG for reporting requirements related to child abuse and FFH for parental notification requirements regarding prohibited conduct as defined by that policy.]

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Belton Independent School District
Board of Trustee Meeting Agenda Item

September 21, 2026

Item: Local District Update - 2nd Reading

Contact Person: Melissa Lafferty

Presented for: ☒ Action ☐ Report Only

Supporting Documents: ☐ None ☒ Attached ☐ Provided Later

District Priority or Strategic Objective:

Priority 4: Fiscal Management - Maximize student experiences through transparent, strategic, and sustainable fiscal management.

Background Information:

CFB(LOCAL) - ACCOUNTING: INVENTORIES

The administration proposes a revision to the “Capitalization Threshold” section of CFB(LOCAL) in order to align with recent Texas Education Agency (TEA) updates to the Financial Accountability System Resource Guide (FASRG). We recommend increasing the district’s capital asset capitalization threshold from \$5,000 to \$10,000 to align with the new state capitalization standards. This update will successfully resolve the policy conflict and match local requirements with state law.

Fiscal Implications:

None.

Administrative Recommendation(s):

Approve the proposed changes for CFB(LOCAL) as presented.

**Capitalization
Threshold**

The capitalization threshold for purposes of classifying individual capital assets shall be ~~\$5,000~~ \$10,000.

The Superintendent shall determine the capitalization threshold for a group of assets, the individual cost of which does not exceed the capitalization threshold above but for which the cost in the aggregate is significant.

**Capitalization
Threshold**

The capitalization threshold for purposes of classifying individual capital assets shall be \$10,000.

The Superintendent shall determine the capitalization threshold for a group of assets, the individual cost of which does not exceed the capitalization threshold above but for which the cost in the aggregate is significant.