



## Weatherford Independent School District Board Agenda Item

*The mission of the Weatherford ISD is to educate, engage, and empower all students in a safe and positive learning environment to discover and reach their greatest potential.*

### **Date**

July 27, 2026

### **Administrator(s) Preparing Report**

Patricia Melendez, Chief Financial Officer

### **Subject**

Annual Review of Investment Policies

### **Background Information**

Pursuant to the Public Funds Investment Act (PFIA) (Gov't Code 2256.005), the governing body of an investing entity is required to review its investment policies and strategies not less than annually. The District's board policies governing investments are CDA (Legal) which was last updated in October of 2023 and CDA (Local) which was last updated in January of 2025 and are attached for review. No changes are recommended at this time.

### **Strategic Plan Information**

- ☐ Relates to Strategic Goal #1 – Focus on Student Success
- ☐ Relates to Strategic Goal #2 – Focus on Students, Parents, and Communities
- ☐ Relates to Strategic Goal #3 – Focus on Operational Excellence
- ☐ Relates to Strategic Goal #4 – Focus on Employees and Organizational Development
- ☒ Relates to Strategic Goal #5 – Focus on Stewardship

### **Administrative Recommendation**

Administration recommends approval of our existing investment policies and does not recommend any changes.