



Catalina Foothills Unified School District #16
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BOARD AGENDA ITEM

ITEM NO: 4.1

BOARD MEETING DATE: Tuesday, August 11, 2026

NEW BUSINESS ITEM: Consideration of Revisions to Policy and Regulation, DJE, DJE-R, *Bidding / Purchasing Procedures* (first reading)

SUBMITTED BY: Lisa Taetle, Director of Finance

PRESENTED BY: Denise Bartlett, Superintendent

In accordance with the updated Uniform System of Financial Records (USFR) guidelines issued by the Arizona Auditor General, effective July 2026, District Policies DJE and DJE-R Bidding/Purchasing Procedures have been revised to align with state procurement rules and federal uniform guidance. Most notably, these updates reflect the state's adjustment of the informal purchasing threshold, increasing the minimum requirement for soliciting three written price quotations from \$10,000 to \$15,000 to account for inflation and ease small-dollar administrative burden while allowing purchases under \$15,000 to be completed at the Superintendent's discretion using reasonable business judgment.

Additional policy revisions formalize required written documentation and specialized USFR forms for sole-source and emergency procurements, establish enhanced due diligence and compliance verification for cooperative purchasing agreements, and reinforce federal suspension and debarment documentation.

The Arizona Auditor General maintains the USFR, which establishes compliance and financial guidelines for all Arizona school districts. As part of the recent USFR reorganization, the comprehensive threshold requiring districts to solicit multiple competitive quotes was officially increased from \$10,000 to \$15,000, with an effective date of July 1, 2026.

While the state has increased this limit, Arizona school districts remain restricted to the lower \$10,000 threshold until their local Governing Board formally adopts the change into district policy.

Rationale & Impact

- **Operational Efficiency:** Raising the threshold to \$15,000 reduces administrative burdens on staff for smaller, routine purchases while remaining fully compliant with state auditing standards.
- **Purchasing Power:** This adjustment aligns District operations with inflation and current market pricing, allowing for faster procurement turnarounds on critical items.
- **Continued Compliance:** All purchases exceeding \$15,000 will continue to strictly follow standard USFR quote and formal bidding guidelines.

Fiscal Impact

There is no direct fiscal impact or additional cost to the District. This is an administrative update to procurement thresholds.

RECOMMENDED MOTION: I move that the governing board approve revisions to Policy DJE and Regulation DJE-R, *Bidding/Purchasing Procedures*, in accordance with the revised uniform system of financial records guidelines for the District, as presented.