



PURCHASING GUIDELINES

Updated September 24, 2025

DISTRICT FUNDS or SCHOOL FUNDS

Purchasing Guidelines

ITEMS THAT DO NOT REQUIRE A PROCUREMENT PROCESS

- Professional or Trade Certification or Recertification Training that is required to obtain the knowledge, experience, and skill to perform the job or tasks associated with the employee's current position
- Conference registration
- Contracts and purchases between other Utah governmental entities
- Musical & Movie royalty rights
- Amusement park entrance fee - (i.e. Lagoon, Disney Park, Knotts Berry Farm)
- Professional Association Membership dues and fees (i.e. NHS, IB, HOSA, UHSAA)
- Any fee **required** for State, Regional and National competitions (i.e. DECA, FCCLA, Cheer, Drill, Athletics, Robotics, FBLA, NASSP, Performing Arts, NHS, Varsity, etc.)

ITEMS REQUIRING ADDITIONAL APPROVALS PRIOR TO SUBMITTING A

PURCHASE ORDER REQUEST IN QMLATIV

- All **computer equipment** is to be reviewed by Information Technology and must be approved prior to purchase.
 - [Technology Purchasing – Canyons School District](#)
- All **curriculum** is reviewed by Instructional Supports and must be approved before purchase.
 - instructionalmaterials.canyonsdistrict.org/#/ViewMaterials
 - <https://canyons.app.learnplatform.com>
- All **music equipment** is subject to review by Instructional Supports Learning Music Specialists.
- All **library/media** room shelving must be approved by a Library Specialist.
- **Large equipment/anything requiring power** – subject to review and approval by Facilities
- Additional Federal requirements apply to **nutrition service** procurements using Federal funds.



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THRESHOLDS
FOR ITEMS THAT REQUIRE A PROCUREMENT PROCESS

Level	Dollar Range	Requirements	Notes
I	\$0 – 5,000	<ul style="list-style-type: none">▪ Buy from District Warehouse.▪ Use District bids or State Contracts when available.▪ Competition not required (but recommended).▪ Enter Purchase Order Request in Qmlativ if applicable.▪ Direct purchase allowed with Purchasing Card, NPO, or School Check.	<ul style="list-style-type: none">▪ Purchases may NOT be split to stay under the single purchase threshold.▪ IT review required for all computer equipment.▪ Music equipment reviewed by ISD – Music Specialist.
II	\$5,000 – \$15,000	<ul style="list-style-type: none">▪ Purchasing involvement is required at this level.▪ Buy from District Warehouse▪ Use District bids or State Contracts when available.▪ Two written competitive quotes required * (telephone/email acceptable; internet pricing not acceptable).▪ Enter Purchase Order Request in Qmlativ.	<ul style="list-style-type: none">▪ No Pcard or NPO's are allowed at this level.▪ Quotes must be kept on file for audit purposes. Attach to Purchase Order Request.▪ Purchases may NOT be divided in order to avoid the next level.▪ Equipment \$2,000+ and items defined as "walkables" must be recorded with the Fixed Asset Department.▪ The Purchasing Department can also assist with obtaining quotes.
III	\$15,000 – \$50,000	<ul style="list-style-type: none">▪ Purchasing involvement is required at this level.▪ District or state contracts should be used - if applicable.▪ Schools/Departments to enter a Purchase Order Request.Minimum of three (3) written competitive quotes are required.Attach to the Purchase Order Request in Qmlativ.	<ul style="list-style-type: none">▪ No Pcard or NPO's are allowed at this level.▪ Purchases may NOT be divided in order to avoid the next level.▪ The Purchasing Department can also assist with obtaining quotes.



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Level	Dollar Range	Requirements	Notes
IV	\$50,000 and above	<ul style="list-style-type: none">■ Purchases \$50,000 and greater MUST be approved by the District Chief Procurement Officer, Director of Purchasing, prior to the purchase.■ District or state contracts should be used, if applicable.■ Purchases greater than \$120,000 MUST be approved by the Board of Education prior to ordering or initiating a purchase with the vendor.	<ul style="list-style-type: none">■ No Pcard or NPO's are allowed at this level.■ Formal solicitation MUST be conducted by the Purchasing Department.■ Sole Source is required if we are awarding a contract/purchase directly, without engaging in a standard competitive procurement process, because only one source is available or appropriate.

*Definition of competitive quotes – Telephone call or email. We recommend that you request that the supplier(s) restate their telephone quote in an email. Internet pricing is NOT acceptable.

VERIFICATION OF PURCHASES MADE WITH DISTRICT FUNDS

- Proper documentation (verified PO or packing slip) must be submitted before payment.
- Verification should occur within **1–2 days** of receipt.
- Verification must include: receiving employee's signature, PO number and status (complete/partial).
- Accounts Payable will not process invoices without verification.
- Issues with shipments/invoices must be resolved by the school/department.
- Discounts must be processed immediately to ensure timely payment.



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AWARD OF CONTRACT WITHOUT ENGAGING IN A STANDARD PROCUREMENT PROCESS
(SOLE SOURCE)

What is a Sole Source?

A sole-source item is a commodity or service available from only one supplier, which holds the exclusive right to manufacture, sell, or provide it. In such cases, a contract or purchase may be awarded without following the standard competitive procurement process.

When is a Sole Source required?

Award of a contract/purchase without engaging in a standard procurement process (bids/quotes) is appropriate if it can be determined in writing that:

- There is only one source from which the product or service can be purchased from.
- Transitional costs are a significant factor in selecting the procurement item.
- The price exceeds \$5,000, and it is determined that only one source can provide the required supply, service, or construction; in this case, a completed Sole Source form must be attached to the requisition.

In accordance with the State of Utah Procurement Code, any purchase over \$50,000 will be posted on our procurement platform as an intent to award without engaging in a competitive process (solicitation for bids/quotes).

- If other suppliers compete, their information will be provided to the requestor before an award is made.

The Sole Source form is available on the Purchasing website.



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Updated June 12, 2025

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PCARDS

Key Guidelines

Designed for small-dollar purchases to increase efficiency and reduce costs. Not to bypass established purchasing/payment procedures.

Cardholder Rules	Purchase Approvals	Contacts
<ul style="list-style-type: none">The card is issued in <i>your name</i> and you are responsible for purchases made with it, and is not to be shared or loaned out.Splitting transactions to avoid the limit is prohibited.Ask vendors to remove sales tax (District is tax exempt).Submit receipts in statement order (itemized required for ALL purchases).Complete reconciliation by 15th; submit to supervisor.	<ul style="list-style-type: none">Technology: Must be reviewed/approved by Information Technology.Curriculum: Must be reviewed/approved by Instructional Support.Music Equipment: Must be reviewed/approved by Instructional Support Music Specialist.Library/Media: Must be reviewed/approved by Instructional Support Library Specialist.Large equipment/anything requiring power: Subject to review and approval by Facilities.	<ul style="list-style-type: none">Report lost/stolen cards or fraud immediately to:U.S. Bank Customer Service: 1-800-344-5696District Program Administrator: Rachel Blackburn
3-Strike Rule <ul style="list-style-type: none">Improper use = infractions recorded.Repeated violations may lead to cancellation, disciplinary action, or termination.		



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Utah Public Officers' and Employees' Ethics Act

UTAH CODE 65, CHAPTER 16

Any person acting as a procurement officer for the District or who in any official capacity, participates in the procurement of any supplies, services, construction, real property, or insurance for the District shall not ask, receive, or offer to receive any emolument, gratuity, contribution, loan, reward, or any promise thereof, either for the person's own use or the use or benefit of any other person interested in the procurement item.

67-16-4 Improperly disclosing or using private, controlled, or protected information -- Using position to secure privileges or exemptions -- Accepting employment that would impair independence of judgment or ethical performance -- Exception.

67-16-5 Accepting gift, compensation, or loan – When prohibited.

Public officers and employees may not accept gifts or benefits of substantial value if it could improperly influence their duties, reward them for official actions, or involve parties they are regulating or making decisions about — unless properly disclosed.

- Items that could be considered a gift, but not limited to:
 - A loan at an interest rate that is substantially lower than the commercial rate then currently prevalent for similar loans; and
 - compensation received for private services rendered at a rate substantially exceeding the fair market value of the services.
- Prohibited if:
 - It could cause (or appear to cause) bias in performing public duties.
 - It's mainly a reward for official actions.
 - It involves someone directly affected by current or upcoming government action, unless disclosed.
- Does not apply to:
 - Small, occasional non-monetary gifts worth \$50 or less.
 - Awards publicly presented in recognition of public service.
 - Legitimate loan made in normal business practices.
 - A political campaign contribution.

67-16-5.3 Requiring donation, payment, or service to government agency in exchange for approval -- When prohibited.

67-16-8 Participation in transaction involving business as to which public office or employee has interest -- Exceptions.



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67-16-9 Conflict of interests prohibited. No public officer or public employee shall have personal investments in any business entity which will create a substantial conflict between the public officer's or public employee's private interests and the public officer's or public employee's public duties.

- Each employee is expected to avoid conflicts of interest or the appearance thereof. If an employee has a personal, professional or financial relationship with a vendor, that employee should not initiate or approve any purchases with the vendor (i.e. the employee or family member(s) is an owner, creditor, debtor, employee, shareholder or member of the board for a vendor). The employee's supervisor should conduct the business in place of the employee in order to avoid a conflict of interest.
- Please see the Employee Conflict of Interest Form located on the Purchasing website, under Purchasing Forms.

67-16-10 Inducing other to violate Chapter. No person shall induce or seek to induce any public officer or public employee to violate any of the provisions of this chapter.

67-16-11 Applicability of provisions.

67-16-12 Penalties for violation – Removal from office or dismissal from employment.

- Anyone who knowingly and intentionally violates the ethics law (except Sections 67-16-6 and 67-16-7) faces **serious consequences**.
 - Over \$1,000 – Second-degree felony
 - \$251–\$1,000 – Third-degree felony
 - \$250 or less, **if there are** two prior convictions – Third-degree felony
 - \$101–\$250 – Class A misdemeanor
 - \$100 or less – Class B misdemeanor

67-16-14 Unethical transactions – Duty to dismiss officer or employee -- Right to rescind or void contract.

67-16-15 Complaint -- Political Subdivisions Ethics Review Commission.

67-16-16 Special public office -- Annual conflict of interest disclosure statement -- Exception -- Penalties.