



Uwharrie Charter Academy Standard Operating Procedure (SOP)

Issued: 4/11/24

Revised:

SUBJECT: Athletic Purchase Orders and Procedures

Background: Uwharrie Charter Academy Internal Financial Control Policies and Procedures Handbook, effective May 15, 2020, page 5, notes that “Prior authorization required before ANYONE makes ANY purchases”. However, over multiple years, there has been an issue of coaches and/or athletic parents creating purchases without notification of the following proper ordering procedures. This lack of compliance has resulted in orders being made without the verification of funding. Subsequently this lack of compliance with procedures causes issues with UCA audits as the school is responsible for ensuring purchase orders are made and approved prior to the purchase.

Purpose: The purpose of this policy is to ensure that all athletic purchases, paid by the school, go through proper channels. With that being said, if orders made by a coach without prior approval or purchase order will either not be paid by the school, item(s) being returned, and will result in the coach paying for the product or performance of service.

Additionally, a parent of a team is NOT authorized to place any orders on behalf of the school or the team. If a parent makes a purchase, they will not be reimbursed and the purchase will be marked as a donation to the team. If the purchase has not followed the procedure and is not considered a donation, then it may not be used on the field.

NOTE: The responsibility for procedures to be followed falls onto the coach and the athletic director. Coaches and/or athletic directors are to meet with all families regarding procedures to include failure to comply at their beginning team/parent meetings.

Procedure for New Purchase Orders:

1. Coach gets a quote from the vendor
2. Coach completes purchase order (paper copy or emailed PDF, see attached)
3. **PO and quote submitted by coach directly to Purchasing Officer Agent, at the central office -drop off, via email, or call (336)460-4648**
4. *Coach tells vendor not to proceed until order is placed by accounts payable*

5. Purchasing Agent will obtain AD approval via email or signature on the PO
 6. Accounts payable will place the order and notify ADs and coaches when orders arrive
- While UCA is fortunate to have families that support our athletic teams, once funds are raised and added to the team account, they are not for parents' use and they cannot make purchases on behalf of the team. Funds raised by a team or parent organization, will be earmarked for that sport and/or specific purpose. Again, parents cannot make purchases on behalf of the school, they have to work through their coach and they work with our purchasing office.

The following are procedures for athletic fundraisers and reimbursements. (Note: At any time an athletic organization can create their own booster following the UCA Parent/Booster Agreement, dated March 14, 2024.)

Procedures for Reimbursements:

1. Coach meets with AD to discuss reimbursement
2. AD approves reimbursement by completing Reimbursement Form
3. AD submits Reimbursement Form and receipt to Accounts Payable
4. No reimbursements will be honored unless approved in advance.
5. Reimbursements should only be considered in unique circumstances, and should not be used to circumvent the approved purchase process.

Procedures for Athletic Fundraisers:

1. Coach meets with AD to fill out fundraiser form
2. AD signs and submits to Accounts Receivable
3. No fundraisers may begin or be promoted before AD approval
4. No fundraisers may begin before final cuts are made
5. Include the reason for the fundraiser in your request and promotion (new equipment, etc.)

Procedures for Fundraisers and Purchases through Boosters:

Fundraisers that go through the Boosters Club means that the Boosters Club will be responsible for the collection and expenditure of the funds as well as ordering, receiving, and distributing the goods. Items order will be delivered to the designated affiliate's P.O. Box number if not picked up in-person.

However, if there is a joint request based on purpose/purchase (example: bus for championship playoff, championship rings, copier paper-based on the affiliate) monies can be issued to the school via Accounts Receivable for the direct purchase. Purchases will be made within 5 business days of the request. With that said, the request must be made prior to the fundraiser to ensure agreement between parties.

Failure to Follow Procedures:

1. Will result in a Letter of Reprimand to the coach and they will be held responsible for the payment of the purchase. Additionally, the coach will not be allowed to fundraise for the purchase of the particular item(s) until the next school year.

2. Continued failure by the coach for not following procedures or for parent orders could result in possible suspension or termination from their coaching position.

Printed Name: _____

Signature of Understanding: _____

Date: _____