

Task Title: Purchasing Procedure Memo

OALCF Cover Sheet – Learner Copy

Learner Name:_____

Date Started:_____

Date Completed: _____

Successful Completion: Yes ☐ No ☐

Goal Path: Employment ■ Apprenticeship ☐

Secondary School ☐ Post Secondary ☐ Independence ☐

Task Description: The learner will find relevant pieces of information in a Work Shift Memo to answer questions.

Main Competency/Task Group/Level Indicator:

- Find and Use Information/Read continuous text/A1.2
- Communicate Ideas and Information/Write continuous text/B2.2
- Communicate Ideas and Information/Interact with others/B1.2 (optional)

Materials Required:

- Pen/pencil and paper and/or digital device

Learner Information

Memos provide information regarding responsibilities and tasks expected between levels of management. They are a way to communicate to clarify tasks, make deadlines and assign responsibilities. Memos are also used to explain new procedures and policies.

Read the scenario and memo.

Scenario:

ABC Company has hired a new Purchasing Manager, Samuel Murtz. In the past, each department purchased its own supplies. Now, all purchases must be approved through the new Purchasing Manager. Each Department Manager is being asked to take charge of setting up the new purchasing approval procedure in their department.

You are the Department Manager. You have scheduled a short meeting today to explain the new procedures to your staff. The procedures are outlined in the Memo you received from the Purchasing Manager.

MEMO

DATE: October 2, 2024

TO: All Department Managers

FROM: Samuel Murtz, Purchasing Manager, ABC Company

SUBJECT: NEW PURCHASING PROCEDURE

Effective October 3, all purchases from every department must be approved by me or by Bertha Hadley, my assistant. Each department will receive a supply of requisition forms. Each form is numbered and each section is colour-coded.

When your department needs supplies or equipment, complete Form A, the pink requisition form, and send it to me. If you have a supplier, please indicate the name on the form. Do not detach this paper from the rest of the five-part form. I will return it to you within five days, marked “Approved” or “Denied”.

If your request is approved, complete forms B through E and distribute them: Form B (white) to the supplier; Form C (blue) to the purchasing department; Form D (yellow) for your files; and Form E (green) is to be attached to the bill and sent to the accounting department after the purchase arrives.

This new system will result in considerable savings. I realize it may also take time and cause some initial delays. Please do not wait until the last minute when ordering. We will be instituting rush procedures in the near future, but they will be for emergency situations only. It is your job to see that your department does not run out of supplies.

Please make sure that all of your staff understands the new procedures.

Work Sheet

Task 1: Circle, highlight or underline the name of the person who wrote the memo. If completing this task digitally, enter your answer.

Answer:

Task 2: When does the new purchasing procedure take effect?

Answer:

Task 3: Name two things that each form has on it.

Answer:

Task 4: What is the first thing a department needs to do when they want to purchase supplies or equipment?

Answer:

Task 5: List the colour of each of the forms B to E and where each one has to go.

Answer:

Task 6: Write out a short speech that outlines the new procedure to staff.

Answer:
