

Task Title: Purchasing Procedure Memo

OALCF Cover Sheet – Practitioner 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

Instructor/Practitioner Information

This task set currently contains six tasks and involves Competency and Task Group A1, Find and Use Information/Read continuous text and B2, Communicate Ideas and Information/Write continuous text.

At the Instructor/Practitioner's discretion, a seventh task could be added to involve Competency and Task Group B1, Communicate Ideas and Information/Interact with others/B1.2. See Task 7 below.

(Optional) Task 7 – Present your short speech to someone in your class or group (e.g. learner, student, tutor or instructor). Ask them for feedback about your speech. Did they hear and understand the key points of the new procedure?

Answer: In this task, the key indicator is "explain or exchange information" with others. It is important that the key points from the memo are included in the oral presentation of the speech written in Task 6. Provide feedback based on the performance indicators with emphasis on clarity, organization of information, appropriate tone for a workplace and completeness of the message.

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:

Answers

Task 1: Circle, highlight or underline the name of the person who wrote the memo.

Answer: The circled, highlighted or underlined name should be Samuel Murtz.

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

Answer: October 3.

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

Answer: Each form is numbered and each section is colour-coded.

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

Answer: Complete Form A, the pink requisition form, and send it to me (Purchasing Manager – Samuel Murtz).

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

Answer:

Form B (white) – Supplier
Form C (blue) – Purchasing Department
Form D (yellow) – Files
Form E (green) – Attached to the bill and sent to the accounting department after the purchase arrives.

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

Answer:

On October 3, there will be a new procedure for purchasing supplies and equipment. We have to complete the Pink Requisition Form A and send it the Purchasing Manager for approval. Once it is approved, we separate the other

4 colour-coded copies. Form B, the white one, goes to the supplier. Form C, the blue one, goes to purchasing. Form D, the yellow one, goes in our files. Form E, the green one, gets attached to the supplier's bill after the purchase arrives and sent to accounting. We have to plan ahead for all purchases. There will be a new rush procedure in the near future but that will only be for emergencies. Let's keep on top of supply levels. Questions?

NOTE - The email does not have to be those exact words, but it should include the key points of the memo including:

- when the new procedure begins, the first step of the procedure, which is completing Form A (pink) and submitting it for approval; what to do with each of the other coloured-coded forms; and to plan ahead for future purchases.

Performance Descriptors

Levels	Performance Descriptors	Needs Work	Completes task with support from practitioner	Completes task independently
A1.2	scans text to locate information			
	locates multiple pieces of information in simple texts			
	makes low-level inferences			
	makes connections between sentences and between paragraphs in a single text			
B1.2 (optional)	Shows an awareness of factors that affect interactions, such as differences in opinions and ideas, and social, linguistic and cultural differences			
	Demonstrates some ability to use tone appropriately			
	Uses strategies to maintain communication, such as encouraging responses from others and asking questions			

Levels	Performance Descriptors	Needs Work	Completes task with support from practitioner	Completes task independently
	Speaks or signs clearly in a focused and organized way			
	Rephrases to confirm or increase understanding			
	Uses and interprets non-verbal cues (e.g. body language, facial expressions, gestures)			
B2.2	writes texts to explain and describe			
	conveys intended meaning on familiar topics for a limited range of purposes and audiences			
	begins to sequence writing with some attention to organizing principles (e.g. time, importance)			
	connects ideas using paragraph structure			
	uses limited range of vocabulary and punctuation appropriate to the task			

Levels	Performance Descriptors	Needs Work	Completes task with support from practitioner	Completes task independently
	begins to select words and tone appropriate to the task			
	begins to organize writing to communicate effectively			

This task: Was successfully completed ☐ Needs to be tried again ☐

Learner Comments:

Instructor (print): _____

Learner (print): _____