

## OALCF Task Cover Sheet

**Task Title:** Purchasing Procedure Memo

<b>Learner Name:</b>	
<b>Date Started:</b>	<b>Date Completed:</b>
<b>Successful Completion:</b> Yes ___ No ___	
<b>Goal Path:</b> Employment <input checked="" type="checkbox"/> Apprenticeship ___ Secondary School ___ Post Secondary ___ Independence ___	
<b>Task Description:</b> In this task set, a learner is asked to find relevant pieces of information in the document, Work Shift Memo, and to write down responses to questions regarding the document.	
<b>Competencies:</b> A Find and Use Information B Communicate Ideas and Information	<b>Task Group(s):</b> A1 Read continuous text B1 Interact with others B2 Write continuous text
<b>Level Indicators:</b> A1.1: Read brief texts to locate specific details A1.2: Read texts to locate and connect ideas and information B1.2: Initiate and maintain interactions with one or more persons to discuss, explain or exchange information and opinions B2.1: Write brief texts to convey simple ideas and factual information B2.2: Write texts to explain and describe information and ideas	
<b>Performance Descriptors:</b> see chart on last page	
<b>Materials Required:</b> <ul style="list-style-type: none"><li>• Question or Task Sheet</li><li>• Work Shift Memo</li><li>• Help the learner prepare with skill building activities</li></ul>	

**Task Title:** Purchasing Procedure Memo

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

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

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

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**Task 3:** Name 2 things that each form has on it.

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

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

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

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**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?

**Task Title: Purchasing Procedure Memo – ANSWER SHEET**

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

**Task 1:** Circle, highlight or underline the name of the person who wrote the memo. **Samuel Murtz, Purchasing Manager**

**Task 2:** When does the new purchasing procedure take effect? **October 3**

**Task 3:** Name 2 things that each form has on it. **“Each form is numbered and each section is colour coded.” (last sentence of the first paragraph)**

**Task 4:** What does a department need to do first when they want to purchase supplies or equipment? **“complete Form A, the pink requisition form and sent it to me (Purchasing Manager)” (first sentence of the second paragraph)**

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

**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 briefly outlines the new procedure to staff.

**For example:**

**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?**

The speech 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.

**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?

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.

## PURCHASING PROCEDURE 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.

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### MEMO

DATE: October 2, 2012  
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.

Task Title: Purchasing Procedure Memo

Performance Descriptors		Needs Work	Completes task with support from practitioner	Completes task independently
A1.1	<ul style="list-style-type: none"> <li>reads short texts to locate a single piece of information</li> </ul>			
	<ul style="list-style-type: none"> <li>decodes words and makes meaning of sentences in a single text</li> </ul>			
	<ul style="list-style-type: none"> <li>follows the sequence of events in straightforward chronological texts</li> </ul>			
	<ul style="list-style-type: none"> <li>follow simple, straightforward instructional texts</li> </ul>			
	<ul style="list-style-type: none"> <li>identifies the main idea in brief texts</li> </ul>			
A1.2	<ul style="list-style-type: none"> <li>scans text to locate information</li> </ul>			
	<ul style="list-style-type: none"> <li>locates multiple pieces of information in simple texts</li> </ul>			
	<ul style="list-style-type: none"> <li>makes low-level inferences</li> </ul>			
	<ul style="list-style-type: none"> <li>makes connections between sentences and between paragraphs in a single text</li> </ul>			
B1.2	<ul style="list-style-type: none"> <li>shows an awareness of factors that affect interactions, such as differences in opinions and ideas, and social, linguistic and cultural differences</li> </ul>			
	<ul style="list-style-type: none"> <li>demonstrates some ability to use tone appropriately</li> </ul>			
	<ul style="list-style-type: none"> <li>uses strategies to maintain communication, such as encouraging responses from others and asking questions</li> </ul>			
	<ul style="list-style-type: none"> <li>speaks or signs clearly in a focused and organized way</li> </ul>			
	<ul style="list-style-type: none"> <li>rephrases to confirm or increase understanding</li> </ul>			
	<ul style="list-style-type: none"> <li>uses and interprets non-verbal cues (e.g. body language, facial expressions, gestures)</li> </ul>			
B2.1	<ul style="list-style-type: none"> <li>writes simple texts to request, remind or inform</li> </ul>			
	<ul style="list-style-type: none"> <li>conveys simple ideas and factual information</li> </ul>			

	<ul style="list-style-type: none"> <li>demonstrates a limited understanding of sequence</li> </ul>			
	<ul style="list-style-type: none"> <li>uses sentence structure, upper and lower case and basic punctuation</li> </ul>			
	<ul style="list-style-type: none"> <li>uses highly familiar vocabulary</li> </ul>			
B2.2	<ul style="list-style-type: none"> <li>writes texts to explain and describe</li> </ul>			
	<ul style="list-style-type: none"> <li>conveys intended meaning on familiar topics for a limited range of purposes and audiences</li> </ul>			
	<ul style="list-style-type: none"> <li>begins to sequence writing with some attention to organizing principles (e.g. time, importance)</li> </ul>			
	<ul style="list-style-type: none"> <li>connects ideas using paragraph structure</li> </ul>			
	<ul style="list-style-type: none"> <li>uses limited range of vocabulary and punctuation appropriate to the task</li> </ul>			
	<ul style="list-style-type: none"> <li>begins to select words and tone appropriate to the task</li> </ul>			
	<ul style="list-style-type: none"> <li>begins to organize writing to communicate effectively</li> </ul>			

**This task:** was successfully completed\_\_\_\_ needs to be tried again\_\_\_\_

<b>Learner Comments</b>

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**Instructor (print)**

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**Learner Signature**