

STUDENT HOUSING AND COMMUNITY SERVICES REFERRAL PROTOCOL FOR LEGAL SERVICES

September 14, 2022

Introduction

Student Housing and Community Services (“**SHCS**”) and the Office of University Counsel (“**OUC**”) have developed this protocol to direct and manage requests for legal services from SHCS to the OUC (the “**Protocol**”). This Protocol aims to improve the quality of services received by SHCS from the OUC by strengthening continuity of services and by facilitating the development of higher levels of knowledge and understanding between the OUC and SHCS.

SHCS encompasses a number of business units (each a “**Business Unit**”) with unique legal needs requiring specialized knowledge and expertise.

General Principles

This Protocol was established to:

- provide Business Units within SHCS with designated points of contact within the OUC who are subject-matter experts in areas relevant to SHCS; this will enable SHCS to receive coordinated and consistent services from the OUC;
- set out a communication plan between SHCS and the OUC regarding ongoing matters handled by the OUC in connection with SHCS;
- allow SHCS to prioritize legal services it is receiving from the OUC in accordance with its needs;
- develop a reciprocal understanding between SHCS and the OUC about their respective operations in order to ensure that efficient services are provided to SHCS and that scarce institutional resources are used effectively and efficiently; and
- create processes within SHCS to vet and potentially resolve legal matters before they are escalated to the OUC, allowing SHCS to build on previous knowledge acquired through its work with the OUC and ultimately better equipping SHCS to manage its own affairs.

The Protocol


1. The primary contacts in the OUC and SHCS are as follows:

SHCS Business Units	Business Unit Primary Contacts	OUC Primary Contacts
Residence Life & Administration	Lakshmi Sangaranarayanan	Mark Crosbie
Facilities and Building Services	Lakshmi Sangaranarayanan*	Mark Crosbie
Child Care Services	Karen Vaughan	Mark Crosbie
Conferences & Accommodation	Allan DeJong	Mark Crosbie
Business Operations, UBCO	Shannon Dunn	Mark Crosbie
Food Services, UBCV	Colin Moore	Lorena Vlad
Food Services, UBCO	Shannon Dunn	Lorena Vlad
Parking & Access Services	Brian Jones	Lorena Vlad
Purchasing	Paula McCreedy	Lorena Vlad
Communications & Marketing	Lisa Fisher	Michael Serebriakov
Bookstore & Campus Mail	Steve Alb	Michael Serebriakov

*As there is close alignment between Residence Life & Administration and Facilities and Building Services within SHCS, David Kiloh will contact the OUC via Lakshmi Sangaranarayanan regarding any need for legal services from Facilities and Building Services

2. Where a member of a Business Unit (the “**Member**”) believes that the Member needs legal advice or assistance, the Member should first approach the Primary Contact for that Business Unit to discuss the matter.
3. If possible, to facilitate greater control over the use of legal services, Business Unit Primary Contacts should draw on their knowledge, experience, and previous work with the OUC to provide the Member with direction that may avoid the need to refer the matter to the OUC.
4. If the Business Unit Primary Contact determines that a matter should be referred to the OUC, that individual will refer the matter to the OUC Primary Contact and keep the Associate Vice-President, Student Housing and Community Services apprised of the status of the matter. The Associate Vice-President, Student Housing and Community Services is required to sign as Head of Unit for all Request for Contract Review Forms and Indemnity Approval Forms (if applicable).
5. After the Business Unit Primary Contact has engaged the OUC on a matter, the OUC Primary Contact and the Business Unit Primary Contact will decide on the appropriate communications channels. To ensure that the Business Unit Primary Contact remains engaged in the matter and can provide additional instructions, the Business Unit Primary Contact will remain involved in the communications and be copied on all electronic messages, even if the communication with the OUC Primary Contact is primarily through a Member.
6. If the Business Unit Primary Contact contacts a lawyer in the OUC other than the OUC Primary Contact, that lawyer will refer the matter to the OUC Primary Contact.
7. The OUC Primary Contact (or if the OUC Primary Contact is unavailable, the University Counsel) may decide that it may be more appropriate for another lawyer to take carriage of the file. The OUC Primary Contact may involve other lawyers in the OUC or externally, as necessary. For example, the OUC Primary Contact could be unavailable, or the matter could be time-sensitive or require particular expertise. In such cases, the lawyer who takes carriage of the file will brief the OUC Primary Contact on the matter on an ongoing basis.
8. If someone other than the Business Unit Primary Contact contacts the OUC Primary Contact, the OUC Primary Contact will refer such person to the Business Unit Primary Contact.
9. SHCS will establish internal communication and escalation processes with the goal of ensuring that the Associate Vice-President, Student Housing and Community Services and the Business Unit Primary Contacts maintain visibility in respect of the legal matters being handled by the OUC for SHCS.
10. The Primary Contacts and the Associate Vice-President, Student Housing and Community Services will meet semiannually or as needed to discuss ongoing legal matters handled by the OUC for SHCS, SHCS’s priorities, and other matters that may require the assistance of the OUC.


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