

## **SUPPLY MANAGEMENT REFERRAL PROTOCOL FOR LEGAL SERVICES**

August 13, 2012

1. Supply Management (SM) and the Office of University Counsel (OUC) have developed a protocol to direct and manage requests for legal services from SM to the OUC. This process provides SM with a single point of contact in the OUC and also ensures that the OUC is able to deal with a manageable number of “clients” within SM. This will also facilitate the development of higher levels of knowledge and understanding as between the OUC and SM, improving efficiency and service levels. An added benefit of this approach is that it will reduce redundancy and promote operational consistency within SM and assist the OUC in taking a consistent approach when providing legal advice and services to SM.
2. The primary contact in the OUC for SM is Michal Jaworski, Legal Counsel. Michal will involve other lawyers in the OUC as necessary.
3. The primary contact in SM for the OUC is Mike Frost, Manager, Strategic Sourcing.
4. Where a member of SM believes that they need legal advice or assistance, he or she should first approach Mike Frost to discuss the issue. The presumption is that if a matter is important enough to require the involvement of the OUC, it is important enough that Mike is aware of it as well.
5. Mike Frost may be able to draw on his knowledge and experience to provide the member with direction and avoid the need to approach the OUC at all. If Mike is unable to address the problem the member should be referred to the Director, Payment and Procurement Services (Dennis Silva). If the Director determines that legal advice is required, Mike will refer the matter to the OUC. The initial point of contact in the OUC will normally be Michal Jaworski.
6. Once the OUC has been engaged on a matter, it may make sense for the OUC to speak directly with members of SM closer to the problem or who have relevant information about the issue. In these circumstances both Mike Frost and the Director should be copied on communications so that they remain aware of the status of the matter and can provide meaningful instructions if required.
7. Where any person within SM contacts a lawyer in the OUC other than Michal Jaworski, that lawyer should generally refer the matter back to Michal, unless Michal has previously agreed that it would be more appropriate for another lawyer to take carriage of the file. In circumstances in which Michal is unavailable and the matter is time sensitive, it may be necessary for the lawyer with whom the initial contact was made to take carriage of the file. In such cases, that lawyer must ensure that Michal is briefed on the matter at the earliest possible opportunity so as to avoid duplication of effort.
8. Michal Jaworski will meet with Mike Frost quarterly or as needed to discuss ongoing legal matters and priorities for SM.