



Policy & Procedure Request & Scope Checklist

1. Procedure vs. Policy Determination

- **Policy** (applies to UBC Facilities, sets rules and expectations)
 - Does this define UBC Facilities standards?
 - Will this require enforcement across multiple units?
 - Is this related to compliance, risk, ethics, or operations?
- **Procedure** (specific steps for how to do something)
 - Does this only apply to one of the University Policies or UBC Facilities policies?
 - Does this only apply to one unit/division and its internal processes?
 - Is it an internal workflow or operational guideline?
 - Can this be handled as a **unit-level procedure** without Facilities-wide governance?

2. General Information

- Name of requester: _____
- Unit/Department requesting the policy/procedure: _____
- Contact person for follow-up: _____

3. Justification for the Policy/Procedure

- What issue, gap, or need does this policy/procedure address? _____

- Is this required due to legal, regulatory, or compliance reasons? Yes No
- Is this a best practice, process improvement, or risk mitigation measure? Yes No
- Has this issue been raised before? If so, what was done about it? _____

4. Scope & Impact

- Who does this policy/procedure apply to?
 - Entire department
 - A specific unit/department (name the unit/dept: _____)
 - Specific roles or staff members (list them: _____)
- Will this policy/procedure affect or require action from other units? Yes No
- Will this policy/procedure impact external stakeholders (students, customers, external communities, etc.)? Yes No
- Would other units/departments be negatively affected if this procedure were not Facilities-wide? Yes No
- Can this policy/procedure be managed internally within the unit without department oversight?
 Yes No
- If this is a **unit/department-specific procedure**, does the unit agree to take full responsibility for managing, updating, and communicating it? Yes No Not applicable

5. Governance & Approval

- Does a similar policy already exist? Yes No If yes, explain how this is different.

- Is this an **entirely new policy/procedure** or a **revision to an existing one**?
 New Revision
- Does this require Facilities Leadership Team (FLT) approval? Yes No
- What level of oversight is needed for compliance and enforcement (e.g. Human Resources, Safety & Risk Services, Finance)?

6. Next Steps & Recommendations

- **If Facilities-wide:** Proceed with policy development following UBC Facilities Policies & Procedures Framework PL-GA-01.
- **If unit/department-specific:** Document it as an internal unit procedure and exclude it from department policies and procedures registry.