IEAC End-to-End Workflow & Standard Operating Procedures

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A Comprehensive Guide for New Joiners and Staff

Purpose, Scope, and Principles

Purpose: To standardize how IEAC attracts, evaluates, accredits, and supports institutions, ensuring consistency, quality, and auditability throughout the entire process.

Scope: This document covers the comprehensive end-to-end workflow from first contact through accreditation decision to post-accreditation care and annual monitoring and benchmarking.

Principles: Our work is guided by six core principles that ensure excellence in educational accreditation:

- **Transparency** - Open and clear processes

- **Fairness** - Equitable treatment for all institutions
- **Evidence-based decisions** - Data-driven evaluation
- **Safeguarding** - Protection of students and stakeholders
- **Data protection** - Secure handling of sensitive information
- **Continuous improvement** - Ongoing enhancement of processes

Systems & Repositories

The IEAC workflow relies on several integrated systems to ensure seamless operations:

System	Purpose	Key Features
Website & Application Portal	Lead capture + application intake	Online forms, document upload
Admin Portal/CRM	Lead tracking, stages, tasks, SLAs	Progress monitoring, task management
Email & WhatsApp Business	Templated communications	Official channels only
Zoom/Meet	Discovery/inspection calls	All calls recorded or minuted
Google Drive	Structured document storage	Retention rules compliance

Workflow Phases Overview

The IEAC accreditation process consists of 19 distinct phases, each with specific owners, timelines, and deliverables:

Phase A — Lead Intake & First Response

Trigger: Website form submission, WhatsApp message, email, or referral
Owner: Business Development Representatives
SLA: Acknowledge within 1 business day

Process Steps: 1. Acknowledge lead via approved email/WhatsApp template and log in CRM 2. Qualify basic fit: institution type (school/college/university/online), location, intent (Institutional/Programmatic/Teacher/Agent), timeline 3. Book Discovery Zoom with Lead Inspectors (calendar invite + agenda) 4. Create Drive folder and save all incoming documents

Phase B — Pre-Discovery Due Diligence

Owner: Lead Inspectors (consulting Business Development Representatives)

Red Flag Checklist: - Website legitimacy, governance transparency, faculty listing, address verification - Prior sanctions/controversies (basic open-source check) - Questionable claims (rankings, affiliations, degree-awarding powers) - Safeguarding/child protection policy (for schools) - LMS presence & data privacy posture (for online institutions)

Internal Agreement: Establish provisional fee bracket and any conditions

Phase C — Discovery Call & Minutes

Owner: Business Development Representatives
Participants: Institution + Lead Inspectors
Duration: 45-60 minutes

Standard Agenda: - Institution overview & goals - Accreditation scope & timeline - IEAC process explanation (self-evaluation → inspection → decision → monitoring) - Fees & inspection model (online vs onsite) - Q&A & next steps

Immediate Follow-up: - Minutes of Meeting (MoM): scope, fees quoted, timeline, document list, action owners - Send Application Form (if partial earlier, request full completion)

Phase D — Application & Screening

Owner: Business Development Representatives + Lead Inspectors

Process: 1. Receive Application (ensure fully completed; return if partial) 2. Screen for completeness: legal docs, safeguarding, curriculum outline, org chart, faculty CVs, facilities list, LMS access (if online) 3. Decision to Proceed (or "hold/clarify")

Phase E — Inspector Assignment

Owner: Lead Inspectors

Steps: 1. Assign Reporting (Lead) Inspector (and Support Inspector if required) 2. Obtain Conflict-of-Interest & Confidentiality confirmations from inspectors 3. Share scope, timeline, and application pack to inspectors

Phase F — Invoicing & Payment

Owner: Finance/Admin
Policy: No inspection until required fees are received

Process: 1. Issue Proforma/Invoice (accreditation fee; inspection fees per current schedule) 2. Confirm receipt; update CRM stage to "Paid – Schedule Inspection"

Phase G — Inspection Planning

Owner: Lead Inspector (coordinating with Business Development Representatives + Institution)

Online Inspection (default for online institutions): - Agenda: leadership, QA, curriculum/assessment, faculty interviews, LMS demo, safeguarding (for schools), facilities tour (virtual)

Onsite Inspection (preferred for traditional institutions): - Risk/health context permitting; otherwise online first + follow-up onsite later

Phase H — Inspection Execution

Owner: Lead Inspector (+ Support Inspector if assigned)

Focus Areas for Schools: - Student-centric learning outcomes - Curriculum quality & assessment (benchmarked to national/international standards) - Safeguarding & child protection (policies, training, reporting lines) - Inclusivity & SEN (access, differentiation) - Sustainability & peace/global citizenship (embedded across subjects) - Teacher qualifications & CPD - Facilities & Health & Safety - Parent-teacher communication (policies, frequency, transparency) - Governance & leadership - Data & improvement cycles

Focus Areas for Online Institutions: - LMS usability & uptime, data privacy, academic integrity - Tutor responsiveness & support - Assessment security & feedback quality - Student engagement analytics

Phase I — Reporting

Owner: Lead Inspector

Inputs: Inspection evidence, Support notes, website/app form, (optional) AI-assisted grammar/checklists

Outputs: - Draft Evaluation Report (findings mapped to IEAC standards, strengths, areas for improvement, star rating rationale) - Recommendations & Action Plan (time-bound)

Quality Gate: Self-check with IEAC Report Template for consistency

Phase J — Accreditation Committee Review

Owner: Accreditation Committee (independent)

Process: 1. Review draft report + evidence list 2. Send comments directly to Lead Inspector 3. Lead Inspector revises and resubmits Final Report 4. Committee issues Decision (Accredited / Affiliate / Member / Deferred with actions)

Phase K — Decision Communication & Annual Fee

Owner: Business Development Representatives + Finance/Admin

Steps: 1. Notify institution formally (decision letter + summary) 2. Invoice Annual Fees; upon payment: - Issue Certificate & Transcript (star rating) - Share Logo Use Guidelines & Approved Wording

Phase L — Marketing & Public Recognition

Owner: Marketing Team + Web Team

Activities: 1. Announce accreditation on IEAC social channels (LinkedIn, Facebook, Instagram) 2. Add institution to website directory under "Accredited Institutions" 3. Share approved logos, star rating, and profile highlights to boost visibility

Phase M — Public Profile & Controlled Report Access

Owner: Web Team and Business Development Representatives

Implementation: 1. Request institution profile + photos for IEAC website 2. Publish institution card with buttons: Profile · Overall Stars · Certificate & Transcript · Report 3. Report access is controlled: show request form (name/org/contact/purpose). IEAC seeks permission from institution before release

Phase N — Post-Accreditation Care & Account Management

Owner: Business Development Representatives

Cadence: - Quarterly touchpoints (email/Zoom) - Invites to webinars, inspector talks, speaking opportunities - Remind about proper logo use; capture success stories for features (AED, AEC, social)

Phase O — Annual Monitoring & Renewal

Owner: Business Development Representatives + Finance/Admin
Timeline: T-4 weeks from anniversary

Process: 1. Send Annual Fee Invoice 2. Send Annual Monitoring Report form (academic year highlights, changes, safeguarding incidents, complaints, outcomes) 3. Review submission; if risk rises, schedule targeted review/visit 4. Update CRM and files

Phase P — Annual Benchmarking Report

Owner: Business Development Representatives

Deliverable: Institution-specific Benchmarking Report (salary trends, curriculum mapping to standards, employability outcomes, digital learning compliance; with charts and action plan)

Timeline: Within 6-8 weeks of anniversary monitoring completion

Fees & Inspectors (Reference)

- Use the current Inspector Fee Schedule

- Inspectors invoice Finance Team directly for the inspections

Quality, Compliance & Data Protection

Conflict of Interest (COI): All inspectors sign COI for each assignment

Confidentiality & GDPR: Use IEAC channels only; no personal storage; redact sensitive data in public artifacts

Records Retention: Keep core accreditation artifacts 7 years (or per legal requirement)

Complaints & Appeals: Follow IEAC policies; log in CRM; store outcomes

Brand Use: Institutions must follow official Logo guidelines; misuse triggers enforcement

Service Level Agreements & Key Performance Indicators

SLAs (Service Level Agreements)

Process	Target Timeline
First lead response	1 business day
MoM circulation	48 hours post-meeting
Report drafting	10-15 business days post-inspection
Committee decision	Within 10 business days of final draft

KPIs (Key Performance Indicators)

- Lead → Discovery conversion rate
- Application completion rate & time
- Inspection on-time rate

- Decision lead time
- Client satisfaction (post-decision CSAT)
- Renewal & retention rate
- Time to deliver Benchmarking Report

Exceptions, Escalations, and Changes

High-risk red flags → Escalate to Committee Chair before proceeding

Process changes → Versioned SOP; notify all staff; train inspectors

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