

Operations Department (OD) — Complete SOP Set

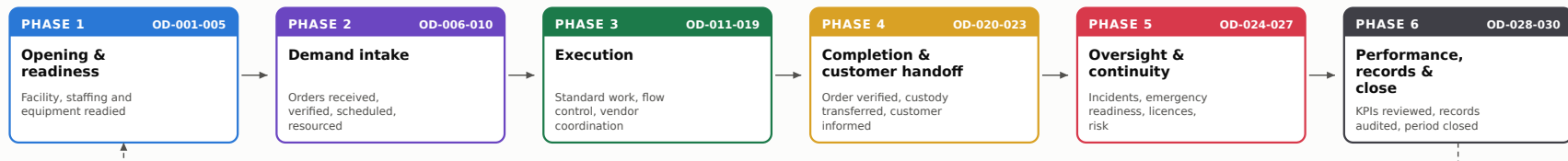
Archetype: EDUCATIONAL_SERVICES · Educational Services

Tier: Free (entire Operations department) · Modules: 30 · Standard: locked 13-section

Contents

PHASE	MODULES
1 · Opening & readiness	OD-001 ... OD-005
2 · Demand intake	OD-006 ... OD-010
3 · Execution	OD-011 ... OD-019
4 · Completion & customer handoff	OD-020 ... OD-023
5 · Oversight & continuity	OD-024 ... OD-027
6 · Performance, records & close	OD-028 ... OD-030

FIGURE 1 — OPERATIONS WORKFLOW



Six phases · 30 modules · one continuous operating cycle, closing back into Phase 1 the next operating day.

Modules

- OD-001 — Daily Operations Opening Procedure
- OD-002 — Shift Handover & Briefing
- OD-003 — Staffing & Coverage Verification
- OD-004 — Work Area Readiness & Housekeeping Inspection
- OD-005 — Operational Equipment Availability Check
- OD-006 — Customer Order / Work Request Intake
- OD-007 — Order Verification & Acceptance Review
- OD-008 — Job Scheduling & Sequencing
- OD-009 — Resource & Capacity Allocation
- OD-010 — Incoming Material / Supply Verification
- OD-011 — Standard Work Execution & Process Adherence
- OD-012 — Work-in-Progress Tracking & Status Update
- OD-013 — Operational Handoff Between Work Stages
- OD-014 — Output Monitoring & Throughput Review
- OD-015 — Bottleneck Identification & Response
- OD-016 — Rework & Nonconforming Work Handling
- OD-017 — Schedule Deviation & Change Management
- OD-018 — Subcontractor & Vendor Coordination
- OD-019 — Interdepartmental Coordination Review
- OD-020 — Job / Order Completion Verification
- OD-021 — Delivery / Service Turnover
- OD-022 — Customer Communication & Status Notification
- OD-023 — Customer Feedback & Complaint Intake
- OD-024 — Operational Incident Reporting & Response
- OD-025 — Emergency & Business Continuity Readiness Check
- OD-026 — Regulatory, License & Permit Currency Verification
- OD-027 — Operational Risk Review
- OD-028 — Operational KPI Review
- OD-029 — Operational Records Retention & Documentation Audit
- OD-030 — End-of-Shift / End-of-Day Operations Closeout

Phase 1 — Opening & readiness

OD-001 — Daily Operations Opening Procedure

Estimated completion time: 30-60 minutes before first scheduled session

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure establishes the fixed start-up sequence that brings an instructional facility to a ready, staffed, and access-controlled state before learners arrive, ensuring each session begins on schedule with the correct instructor coverage, learning spaces, and records systems available.

2. Scope

Covers the shift/day opening sequence for instructional and support operations — facility unlock and access control, staffing sign-on, instructional-space readiness confirmation, and learner-management system availability. Excludes work-area housekeeping (see OD-004), teaching-and-lab equipment availability (see OD-005), and safety-specific readiness such as fire/emergency systems (see SD-001).

3. Responsibilities

- Opening Duty Supervisor (Operations) — executes and signs off the opening sequence; owns escalation and the readiness sign-on record.
- Front Office / Registration Coordinator — confirms learner-management and attendance systems are live and reception is staffed before first session.
- Lead Instructor / Program Supervisor — confirms instructor coverage for scheduled sessions and reports any staffing gaps to the Opening Duty Supervisor.

4. Required PPE & Lockout/Tagout

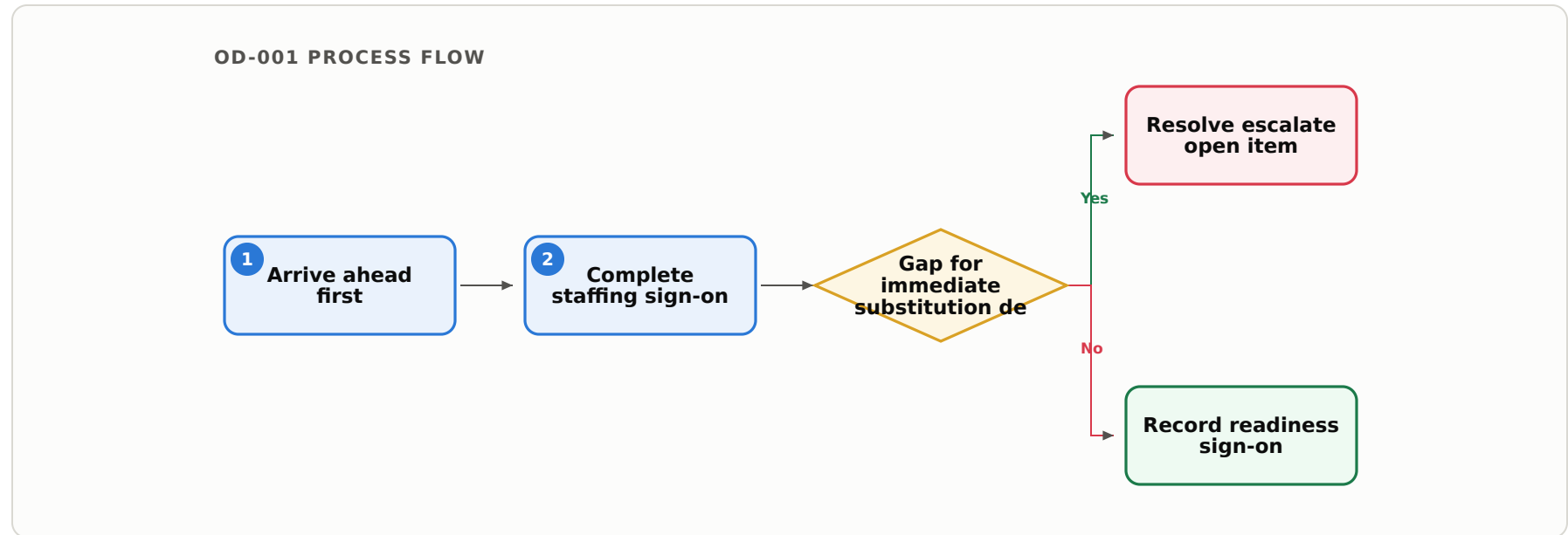
- Standard facility PPE; task-specific PPE only where the service line requires it for the first scheduled session (e.g., eye protection in cosmetology/trade labs, ramp/apron high-visibility vest where a flight-training line operates airside).
- Not applicable — no hazardous energy released during the opening sign-on; energization of instructional equipment is handled under OD-005.

5. Regulatory References

- None sector-specific govern a generic opening sequence across every member of the span; internal operating policy applies as the governing frame. Applicable overlays where in force: Americans with Disabilities Act accessible-route/entrance requirements (28 CFR Part 36) for facility

access, state and local occupancy/fire-egress opening requirements, and program-integrity attendance-tracking obligations (e.g., 34 CFR Part 668 for Title IV-participating institutions; e.g., FAA 14 CFR Part 141/142 or state cosmetology/trade board hour-logging for those lines). Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

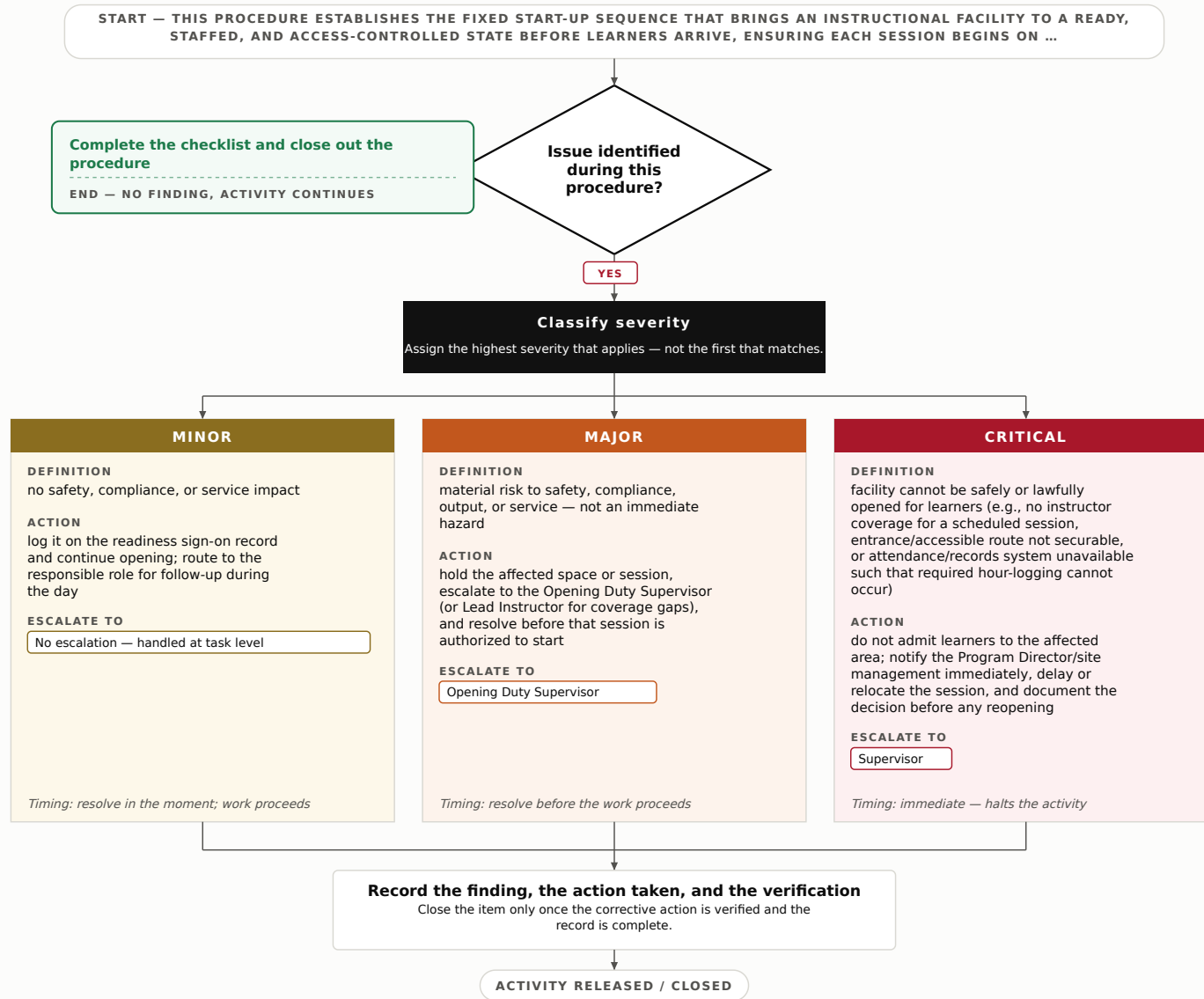


7. Step-by-Step Procedure

1. Arrive ahead of first session; unlock designated entrances, disarm access-control/alarm per assigned code, and confirm accessible routes and entrances are clear and operable.
2. Complete staffing sign-on: verify each scheduled instructor and support staff member has arrived or confirmed remote coverage; log actual sign-on times.
3. With the Lead Instructor / Program Supervisor, confirm coverage matches the day's session schedule; flag any gap for immediate substitution decision.
4. Walk each learning space to confirm it is unlocked, lit, climate-set, and set to the room roster/session plan (housekeeping condition per OD-004; equipment status per OD-005 — do not duplicate here).
5. With the Registration Coordinator, confirm the learner-management/attendance system is live and reachable and that today's rosters and check-in method are loaded.
6. Confirm front reception/reception line is staffed and learner check-in signage/queue is ready for arrivals.
7. Resolve or escalate any open item per the Decision Tree before authorizing session start.

8. Record the readiness sign-on: time opened, staff signed on, spaces confirmed, systems status, and exceptions; obtain Supervisor Verification signature.

8. Decision Tree

Decision Tree — Daily Operations Opening Procedure**READING THIS TREE**

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- All scheduled sessions have confirmed instructor coverage before first arrival.
- All learning spaces for the day's schedule confirmed unlocked, accessible, and set.
- Learner-management/attendance system confirmed live and rosters loaded before check-in.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Entrances unlocked, alarm disarmed, accessible routes clear		
Instructor & support staff signed on; times logged		
Coverage matches day's session schedule		
Learning spaces unlocked, lit, climate-set to roster		
Learner-management/attendance system live; rosters loaded		
Reception staffed; learner check-in ready		
Exceptions logged and routed per Decision Tree		

11. KPIs

- On-time facility open (before first scheduled session) $\geq$ 98% of operating days.
- Session start delays attributable to opening gaps $\leq$ 1% of sessions per month.
- Readiness sign-on completed and signed before first learner arrival = 100% of operating days.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-002 — Shift Handover & Briefing

Estimated completion time: 15-30 minutes per shift transition

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To transfer operational status, open issues, and instructional/service priorities from the outgoing shift to the incoming shift so that continuity of student instruction, supervision, and facility operation is maintained without loss of critical information across the transition.

2. Scope

Covers the structured outgoing→incoming handover of operational status, open learner/enrollment issues, resource and room/equipment status, and shift priorities across all instructional and support operations. Excludes the safety pre-shift briefing, which is covered under SD-003, and maintenance-crew handover, which is covered under MD-001.

3. Responsibilities

- Outgoing Shift Lead (Operations) — compiles and delivers the handover summary; ensures all open items are documented and flagged before departing.
- Incoming Shift Lead (Operations) — receives and acknowledges the handover; confirms understanding of priorities and open issues; assumes accountability for the shift.
- Operations Duty Manager — verifies the handover occurred, resolves disputed or ambiguous items, and holds final sign-off authority for the transition.

4. Required PPE & Lockout/Tagout

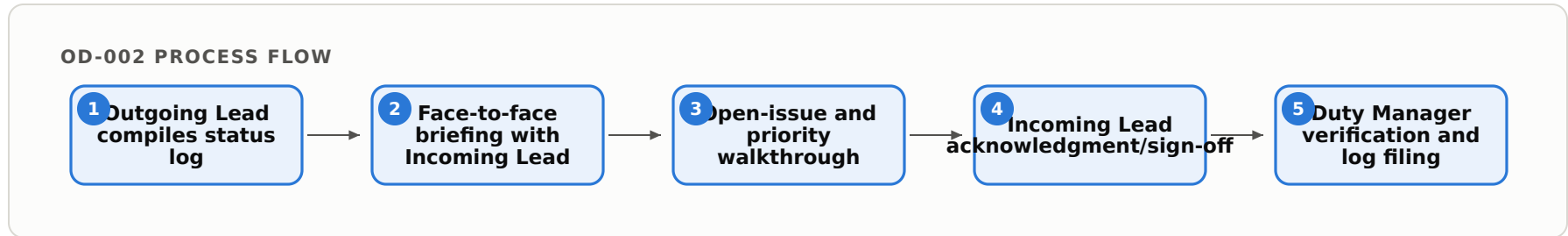
- Standard facility PPE; none specific to this administrative task. Where the service line operates workshops, labs, or vehicles, PPE applicable to those areas is addressed in their own operating procedures.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- FERPA, 20 U.S.C. § 1232g / 34 CFR Part 99 — governs handling and disclosure of student education records referenced in handover notes (applies to every member as a recipient/holder of student records).
- Occupational Safety and Health Act, 29 CFR 1904 — recordkeeping continuity for any incidents carried across shifts (state-plan equivalents may apply, e.g., Cal/OSHA).

- Applicable state education/licensing board requirements for continuous supervision of enrolled students during operating hours (e.g., cosmetology, flight, or trade-school clock-hour rules).
- None sector-specific to handover format itself; internal operations policy applies.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

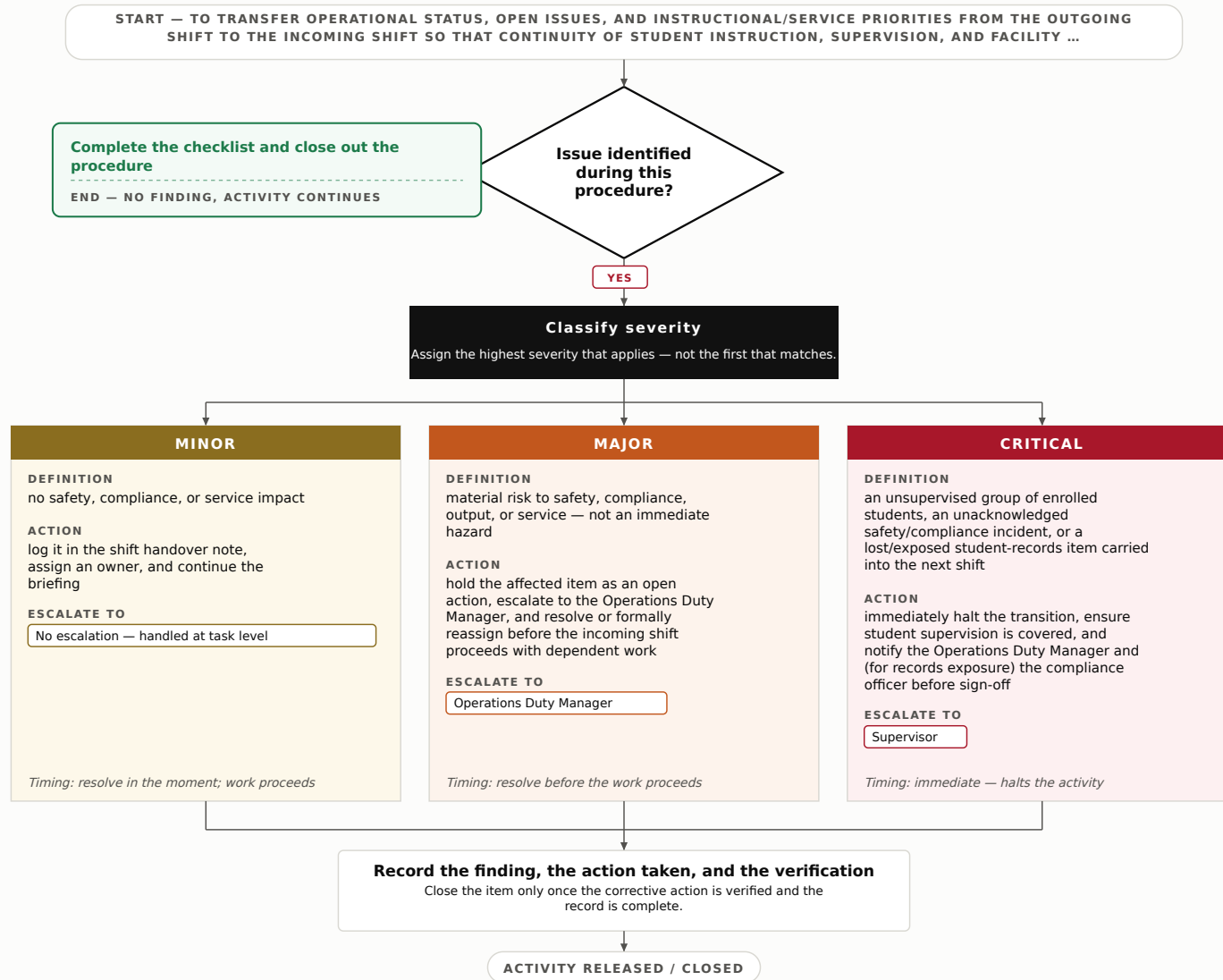


7. Step-by-Step Procedure

1. Outgoing Shift Lead reviews the shift log and compiles current operational status: rooms/labs in use, sessions in progress, staff present, and enrollment/attendance exceptions.
2. Document all open issues — unresolved learner concerns, resource shortfalls, printed-material or supply gaps, and pending follow-ups — with owner and due status for each.
3. Flag any item involving student education records for FERPA-compliant handling; do not include protected details in informal notes accessible to unauthorized staff.
4. Conduct a face-to-face (or documented virtual) briefing with the Incoming Shift Lead at least 10 minutes before shift change; walk through status, then open issues, then priorities.
5. Confirm status of shared audio/visual and instructional equipment carried over from the prior shift; note any items already routed to MD-001 (maintenance) so they are not re-actioned here.
6. Incoming Shift Lead restates the top three priorities and any Critical open items back to the Outgoing Lead to confirm accurate transfer.
7. Both leads sign the shift handover log; the Incoming Lead assumes accountability from the timestamp of sign-off.
8. Duty Manager reviews and countersigns the completed handover log and files it in the operations records system per the institution's retention schedule.

8. Decision Tree

Decision Tree — Shift Handover & Briefing



READING THIS TREE

■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every open issue has a named owner and status before the Outgoing Lead departs.
- Incoming Lead has verbally confirmed the top priorities and all Critical items.
- Handover log is signed by both leads and countersigned by the Duty Manager.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Shift status log compiled and current		
All open issues documented with owner and status		
Student-records items handled per FERPA		
Priorities restated and confirmed by Incoming Lead		
Equipment/maintenance items correctly routed (per MD-001)		
Handover log signed by both shift leads		
Duty Manager verification recorded		

11. KPIs

- On-time handover completion (before shift change): $\geq 98\%$
- Open issues transferred with named owner: 100%
- Carryover issues re-reported as "unknown" next shift: $\leq 2\%$

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

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1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-003 — Staffing & Coverage Verification

Estimated completion time: 20–40 minutes per operating period (session, class block, shift, or flight/lab window)

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1. Purpose

To confirm, before each operating period begins, that every required instructional and supervisory role is physically present, currently credentialed, and formally assigned so that learners are never left without qualified coverage. This protects instructional continuity, learner safety, and compliance with supervision-ratio obligations across the institution.

2. Scope

Covers verification that assigned personnel for a given operating period are present, hold current credentials on file, and are matched to the roles the period requires, including confirmation of designated backups. Excludes the building of schedules and shift assignment, which is covered under HR-015, and confirmation of individual staff competency/qualification standards, which is covered under TR-020.

3. Responsibilities

- Operations Coordinator — runs the coverage check at period start, confirms presence against the assignment roster, and authorizes the period to open.
- Program/Site Supervisor — resolves gaps, approves substitutes, and confirms required supervisor-to-learner ratios are met.
- Instructional/Support Staff — sign in at their assigned station, confirm role assignment, and report any absence or credential lapse immediately.

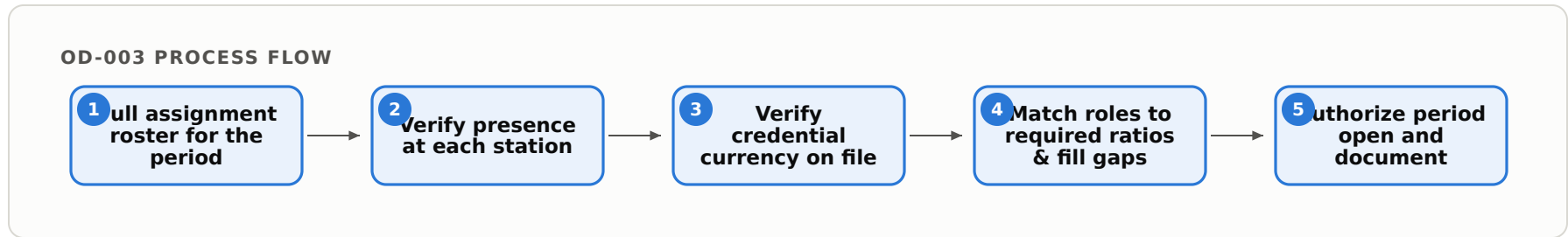
4. Required PPE & Lockout/Tagout

- Standard facility PPE only; no task-specific PPE required for this verification. Where the service line operates hands-on labs, shops, salons, or aircraft, confirm the assigned staff hold role-appropriate PPE before opening that station.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- Fair Labor Standards Act (29 CFR Part 516) — records of persons employed and hours in each work period.
- Occupational Safety and Health Act, General Duty Clause §5(a)(1) — adequate supervision of a safe operating environment.
- Applicable state education/licensing board rules requiring minimum supervision ratios and qualified-instructor presence for the operating period (e.g., state cosmetology board instructor-ratio rules, FAA 14 CFR Part 141 instructor requirements, state K-12 supervision statutes) — the specific regime varies by member and by state.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

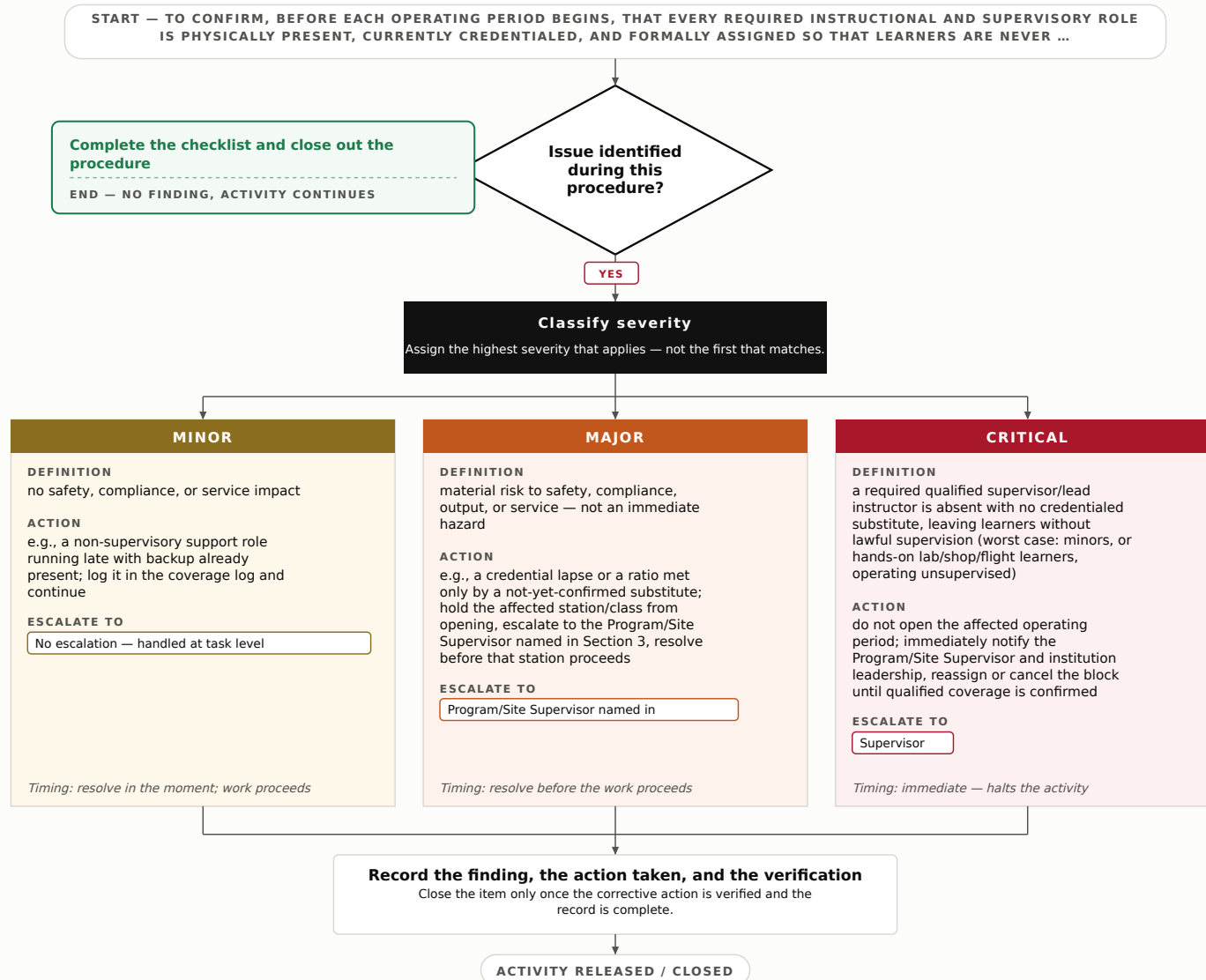
6. Process Flow



7. Step-by-Step Procedure

1. Retrieve the assignment roster for the operating period from the operations system (assignments originate in HR-015; do not re-build them here).
2. Confirm each named instructional and supervisory role is physically present and signed in at their assigned station or classroom.
3. For each present staff member, confirm a current, non-expired credential/authorization is on file (verification standard per TR-020); flag any lapse.
4. Compare present, credentialed staff against the required supervisor-to-learner ratio and any mandated lead-instructor presence for the period.
5. Where a role is unfilled, activate the designated backup or an approved substitute; the Program/Site Supervisor confirms the substitute is credentialed for that role.
6. Confirm no station, class, lab, shop, or flight/training block is scheduled to operate without qualified coverage.
7. Obtain Program/Site Supervisor authorization to open the operating period.
8. Record the verification outcome, roster deviations, substitutions, and authorization time in the coverage log.

8. Decision Tree

Decision Tree — Staffing & Coverage Verification**READING THIS TREE**■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every required role for the period is present or covered by a confirmed, credentialed substitute.
- All present staff have current credentials on file; no expired authorizations in service.
- Required supervisor-to-learner ratios are met at every operating station.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Assignment roster for the period retrieved and current		
All required roles present or covered by approved substitute		
Credential currency confirmed for each present staff member		
Supervisor-to-learner ratio met at every station		
Designated backups identified for the period		
No station/class/lab/flight block opening without coverage		
Supervisor authorization obtained and time-stamped		

11. KPIs

- Operating periods opened with full verified coverage: $\geq 99\%$.
- Coverage verification completed before period start: 100%.
- Unresolved Critical coverage findings at period open: 0.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-004 — Work Area Readiness & Housekeeping Inspection

Estimated completion time: 20–40 minutes per instructional space, before first session of the day

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

Confirm that classrooms, labs, studios, shops, simulators, and other instructional spaces are clean, organized, hazard-free, and equipped for the day's scheduled learning activities so instruction can begin on time and safely. This protects learners, instructors, and staff across every educational service line before occupancy.

2. Scope

Covers the pre-occupancy readiness and housekeeping inspection of instructional and instructor-support spaces (classrooms, computer/technical labs, cosmetology floors, flight/simulation rooms, workshops, lecture halls) and their common circulation paths. Excludes warehouse/central-supply housekeeping (see WH-023) and maintenance-shop housekeeping (see MD-025).

3. Responsibilities

- Operations Supervisor — owns the daily readiness standard, reviews completed checklists, and authorizes space release for instruction.
- Facilities/Custodial Lead — performs cleaning, resets furnishings, clears aisles and egress, and remedies housekeeping deficiencies.
- Instructor of Record / Lab or Studio Monitor — verifies the space is fit for the day's specific activity and confirms consumables and instructional equipment are staged and safe.

4. Required PPE & Lockout/Tagout

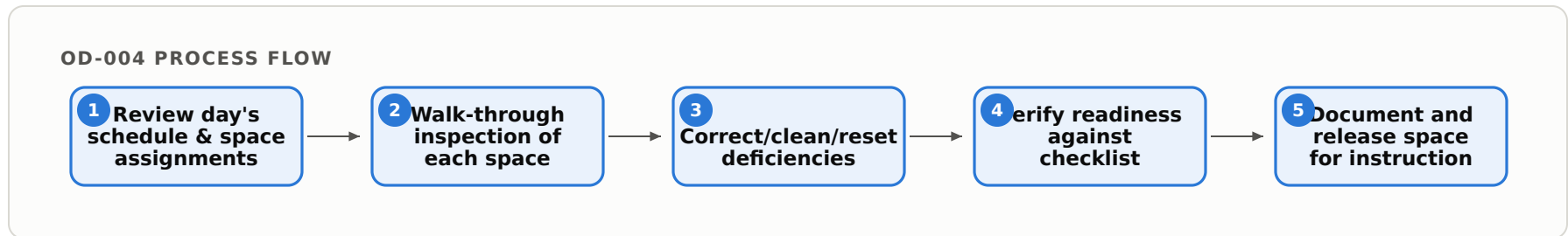
- Standard facility PPE; nitrile gloves and eye protection where cleaning agents or spilled instructional consumables are handled.
- Not applicable — no hazardous energy is controlled by this task. If a fixed instructional machine or trainer is found energized and defective, do not service it; refer to MD-025 and tag it out of service.

5. Regulatory References

- 29 CFR 1910.22 (Walking-Working Surfaces — housekeeping, aisles, clearance).
- 29 CFR 1910.37 & 1910.157 (Means of egress maintenance; portable fire extinguisher access).
- 29 CFR 1910.1200 (Hazard Communication — labeling/SDS for cleaning and instructional chemicals).
- Applicable state/local fire code and occupancy limits adopted from NFPA 101 Life Safety Code; ADA/Section 504 accessible-route clearance for facilities open to the public.

- Member-specific overlays may apply as examples only (e.g., cosmetology board sanitation rules; FAA-approved training-facility conditions), not as the governing frame.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

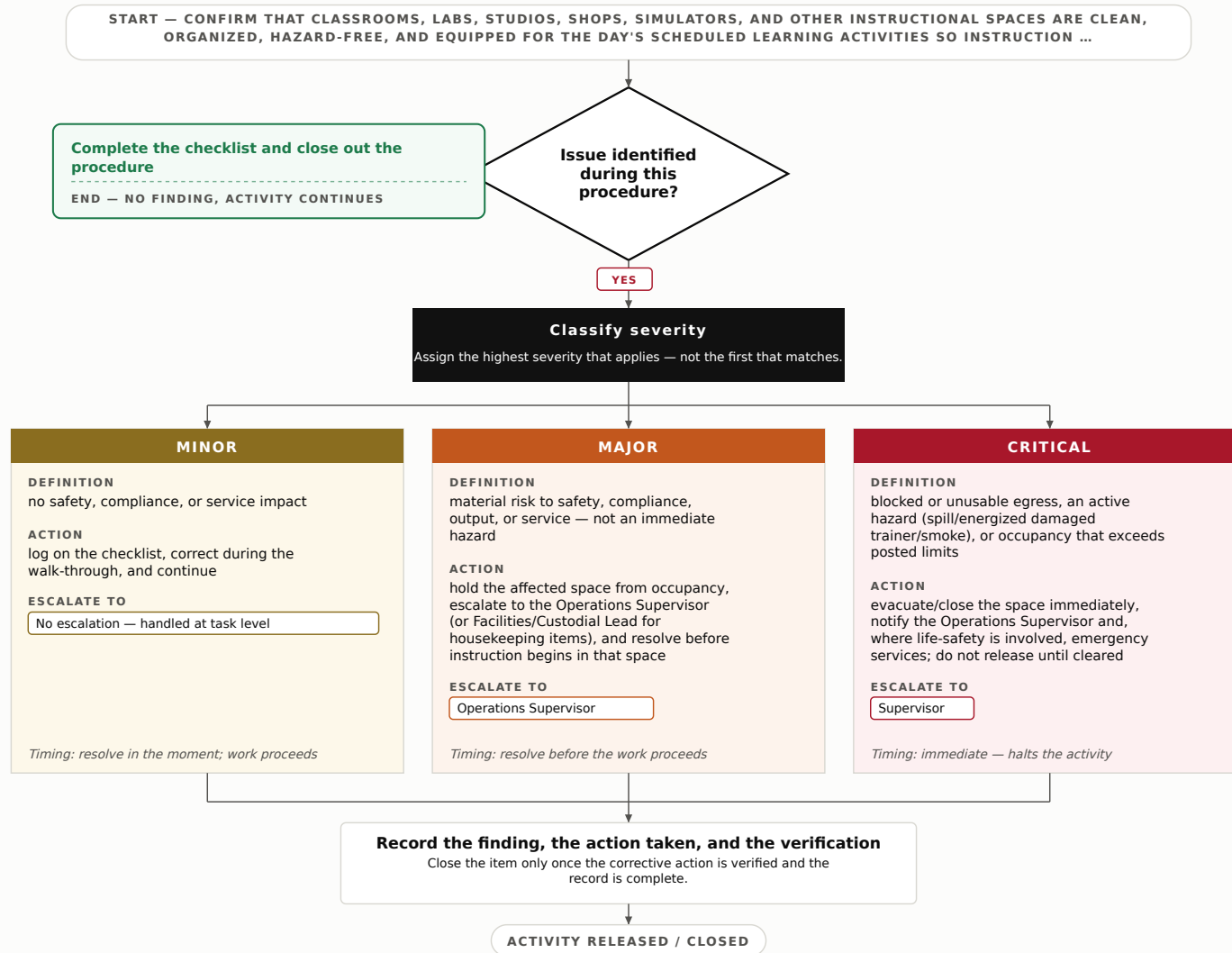
6. Process Flow



7. Step-by-Step Procedure

1. Pull the day's room/lab/studio schedule and note the activity type and expected occupancy for each assigned space.
2. Enter each space and verify aisles, doorways, and marked egress paths are clear and unobstructed; confirm exit signage and extinguisher access are visible.
3. Inspect floors, work surfaces, seating, and demonstration areas for spills, debris, trip hazards, and residue from prior sessions; clean and reset as needed.
4. Confirm instructional consumables and print materials (workbooks, handouts, station supplies) are stocked, organized, and stored per Hazard Communication labeling where chemical products are present.
5. Check that AV and instructional equipment stations are dust-free, cabling is secured, and no damaged units are staged for use (route defective fixed equipment per MD-025).
6. Verify lighting, ventilation, temperature, and waste receptacles are functional and appropriate for the scheduled activity and occupancy.
7. Correct minor deficiencies on the spot; escalate anything that cannot be cleared to the responsible role in Section 3.
8. Record findings on the Inspection Checklist, note corrective actions, and release the space or hold it; obtain Supervisor verification.

8. Decision Tree

Decision Tree — Work Area Readiness & Housekeeping Inspection**READING THIS TREE**

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- All egress paths, exits, and extinguisher access confirmed clear in every assigned space.
- Floors and work surfaces clean, dry, and free of trip hazards prior to occupancy.
- Consumables and instructional materials staged, labeled, and stocked for the scheduled activity.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Aisles, doorways, and egress paths clear and unobstructed		
Exit signage visible; fire extinguisher access unblocked		
Floors/work surfaces clean, dry, free of debris and trip hazards		
Seating/stations reset and organized for scheduled activity		
Consumables/print materials stocked and properly labeled		
AV/instructional equipment clean, cabling secured, no damaged units in use		
Lighting, ventilation, and waste receptacles functional; occupancy within limit		

11. KPIs

- Spaces released ready before first scheduled session: $\geq 98\%$.
- Critical housekeeping/egress findings at inspection: 0 per day.
- Checklist completion and Supervisor verification rate: 100% of occupied spaces.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-005 — Operational Equipment Availability Check

Estimated completion time: 20-45 minutes per instructional period or session block

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To confirm that all instructional and training equipment, tools, and devices required for the upcoming teaching period or session are physically present, functional, and cleared for use, so that scheduled instruction, lab, shop, clinic, or field sessions can begin without interruption.

2. Scope

Covers the pre-period availability check of instructional equipment and tools across classrooms, labs, shops, studios, and training bays — audiovisual/projection units, computers and peripherals, program-specific trainers, simulators, hand tools, and consumable-dependent stations. Excludes equipment condition/inspection (see ED-003), preventive-maintenance status (see PM-024), and material-handling equipment pre-use checks (see WH-004).

3. Responsibilities

- Operations Coordinator — owns the daily/period availability roster; assigns and verifies checks against the session schedule.
- Facilities/Lab Technician — physically confirms presence, powers up and function-tests equipment, and stages tools at each instructional station.
- Program Supervisor (Lead Instructor/Department Lead) — confirms equipment set matches the day's lesson/session plan and authorizes release for instructional use.

4. Required PPE & Lockout/Tagout

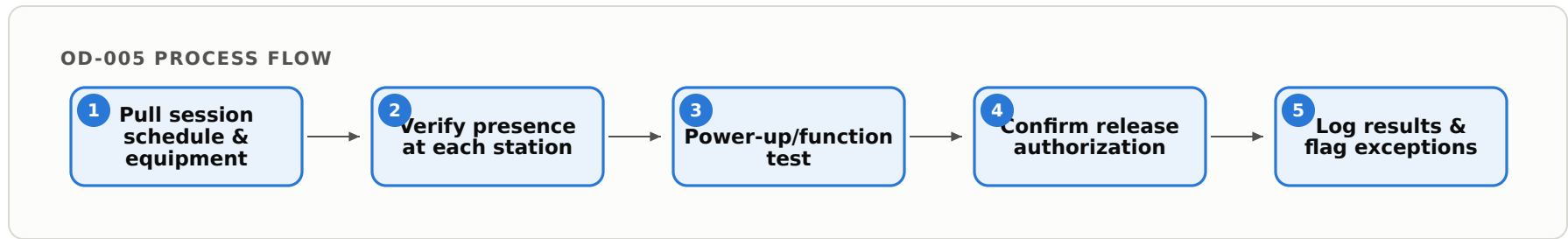
- Standard facility PPE appropriate to the space (e.g., eye protection in shop/lab environments, closed-toe footwear); no additional PPE for administrative check areas.
- Not applicable — this availability check involves no servicing of hazardous energy sources. If a unit requires energized-service work, stop and route to the owning maintenance procedure.

5. Regulatory References

- OSHA General Duty Clause, 29 U.S.C. §654(5)(a)(1) — obligation to provide a workplace free of recognized hazards (governs all members maintaining instructional spaces).
- 29 CFR 1910.303 — electrical equipment general requirements (applies wherever powered instructional equipment is used).
- Americans with Disabilities Act, 28 CFR Part 36 — usable access to equipment and facilities for students and staff.
- NFPA 101 Life Safety Code — egress and equipment placement in occupied instructional spaces (adopted broadly via state/local codes).

- Program-specific overlays may apply as examples (e.g., FAA 14 CFR Part 141 for flight training devices; state cosmetology board sanitation rules for equipment). These are examples only, not the governing frame; internal equipment-readiness policy applies where no sector-specific standard governs.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

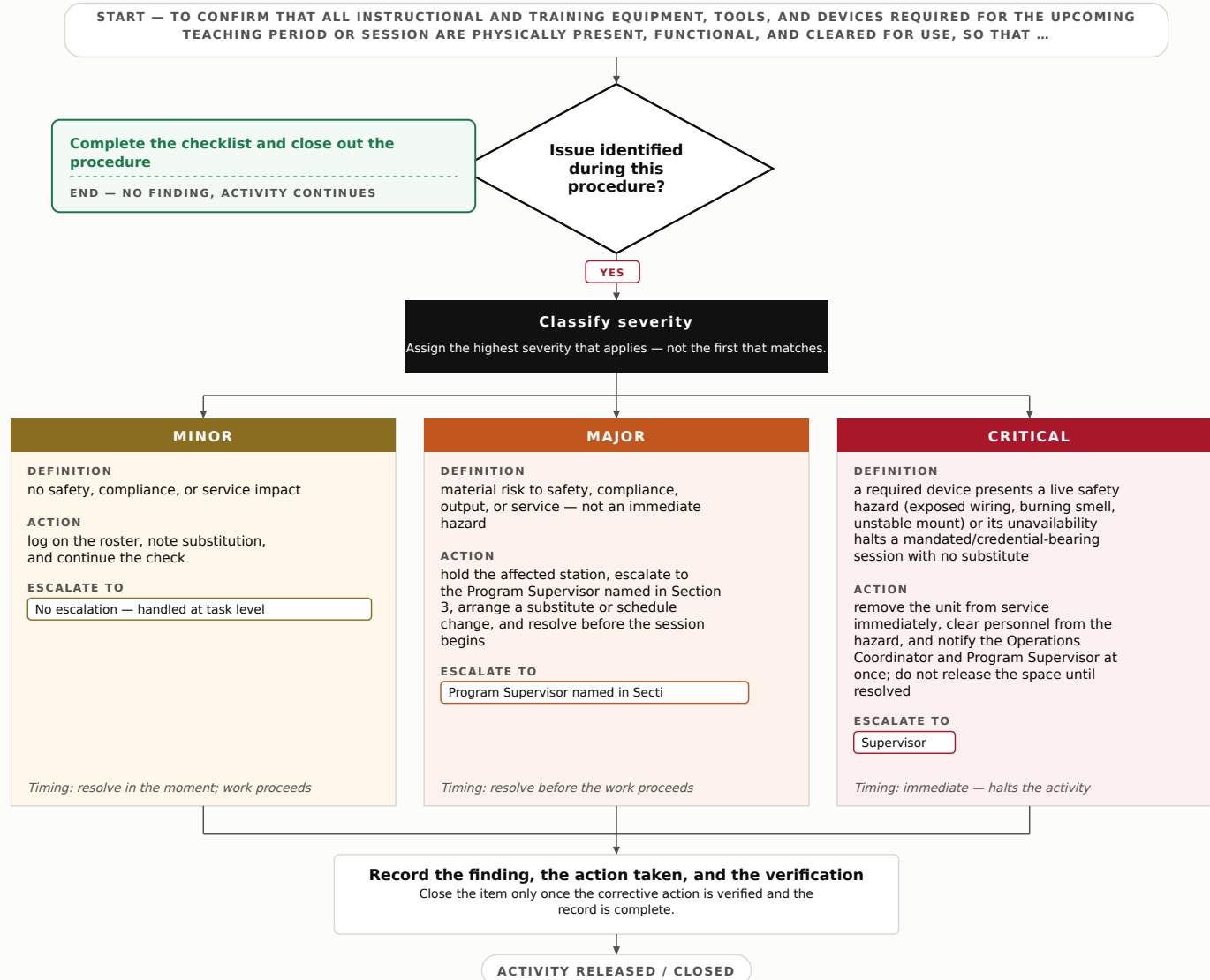


7. Step-by-Step Procedure

1. Retrieve the day's/period's session schedule and the associated equipment requirement list for each room, lab, shop, studio, or training bay.
2. Walk each instructional station and confirm every required unit and tool is physically present and staged at its assigned location.
3. Power up each device (projectors/displays, computers, peripherals, simulators, program trainers) and confirm it reaches a normal operating state.
4. Perform a functional check of the equipment's primary instructional function (image/audio output, network/login, tool operation) sufficient only to confirm availability — not a condition inspection (see ED-003).
5. Confirm consumables and accessories needed for function (media cables, remotes, batteries, required software login) are present and operational; note any needing replenishment from stock.
6. Verify each unit is cleared for use and not held under a maintenance or PM flag (status confirmed per PM-024); do not release flagged units.
7. Obtain Program Supervisor confirmation that the available equipment set matches the lesson/session plan and record release-for-use.
8. Document the check on the availability roster, log all exceptions and actions taken, and file the completed record.

8. Decision Tree

Decision Tree — Operational Equipment Availability Check



READING THIS TREE

■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every station on the session schedule has a completed presence-and-function entry before the period opens.
- All powered devices reached normal operating state or are logged as exceptions with action assigned.
- No unit under an active maintenance/PM hold has been released for instructional use.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
All scheduled equipment/tools present at assigned stations		
Powered devices reach normal operating state		
Primary instructional function confirmed available		
Required media, cables, remotes, and login/software present		
No unit carries an active maintenance/PM hold		
Equipment set matches lesson/session plan		
Release-for-use authorized and recorded		

11. KPIs

- Session-ready rate (stations fully available at period start): $\geq 98\%$
- Availability check completed before scheduled start: 100% of sessions
- Mean time to resolve Major availability exceptions: ≤ 15 minutes

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

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1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

Phase 2 — Demand intake

OD-006 — Customer Order / Work Request Intake

Estimated completion time: 10-25 minutes per intake

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To receive, record, and route incoming enrollment applications, course/program registrations, training bookings, and service requests so that every inbound request from a prospective or current learner (or sponsoring employer/agency) is captured accurately and handed off promptly. This protects revenue, learner experience, and the completeness of the education record.

2. Scope

Covers intake of all customer orders and work requests reaching the Operations front desk, online portal, phone, or sponsor channel — logging, identity/contact capture, request classification, and routing. Excludes acceptance/capability review (seat availability, prerequisite eligibility, program-fit determination), which is covered under OD-007.

3. Responsibilities

- Intake Coordinator — receives requests across all channels, verifies contact/identity fields, logs each request in the student information / registration system, assigns tracking ID, and routes to the responsible program area.
- Operations Supervisor — monitors the intake queue, resolves classification disputes, approves holds, and is the escalation point named in Section 8.
- Records Custodian — confirms consent/privacy handling of captured data and ensures intake entries meet retention and access-control requirements.

4. Required PPE & Lockout/Tagout

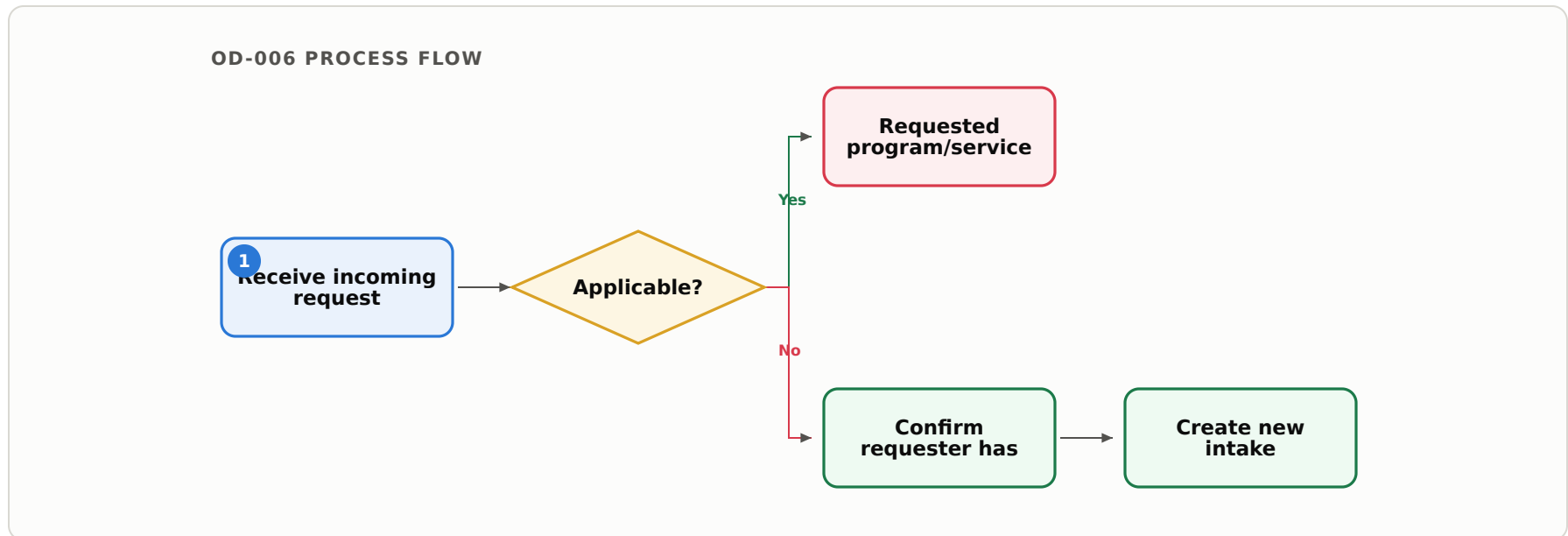
- Standard facility PPE; none beyond normal office/administrative attire for this task.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- FERPA — Family Educational Rights and Privacy Act, 20 U.S.C. § 1232g / 34 CFR Part 99 (protection of personally identifiable information collected at intake, applicable to educational agencies and institutions).
- FTC Standards for Safeguarding Customer Information ("Safeguards Rule"), 16 CFR Part 314 (applies to institutions handling learner financial/enrollment data, including those participating in financial-aid programs).
- ADA Title III, 42 U.S.C. § 12181 et seq. / 28 CFR Part 36 — accessible communication channels for intake by persons with disabilities.

- Internal policy: intake data-capture and consent standard where no broader sector-specific rule governs. (Member-specific regimes may add requirements, e.g., 14 CFR Part 141 enrollment records for flight training or state cosmetology/barber board enrollment logs.)
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

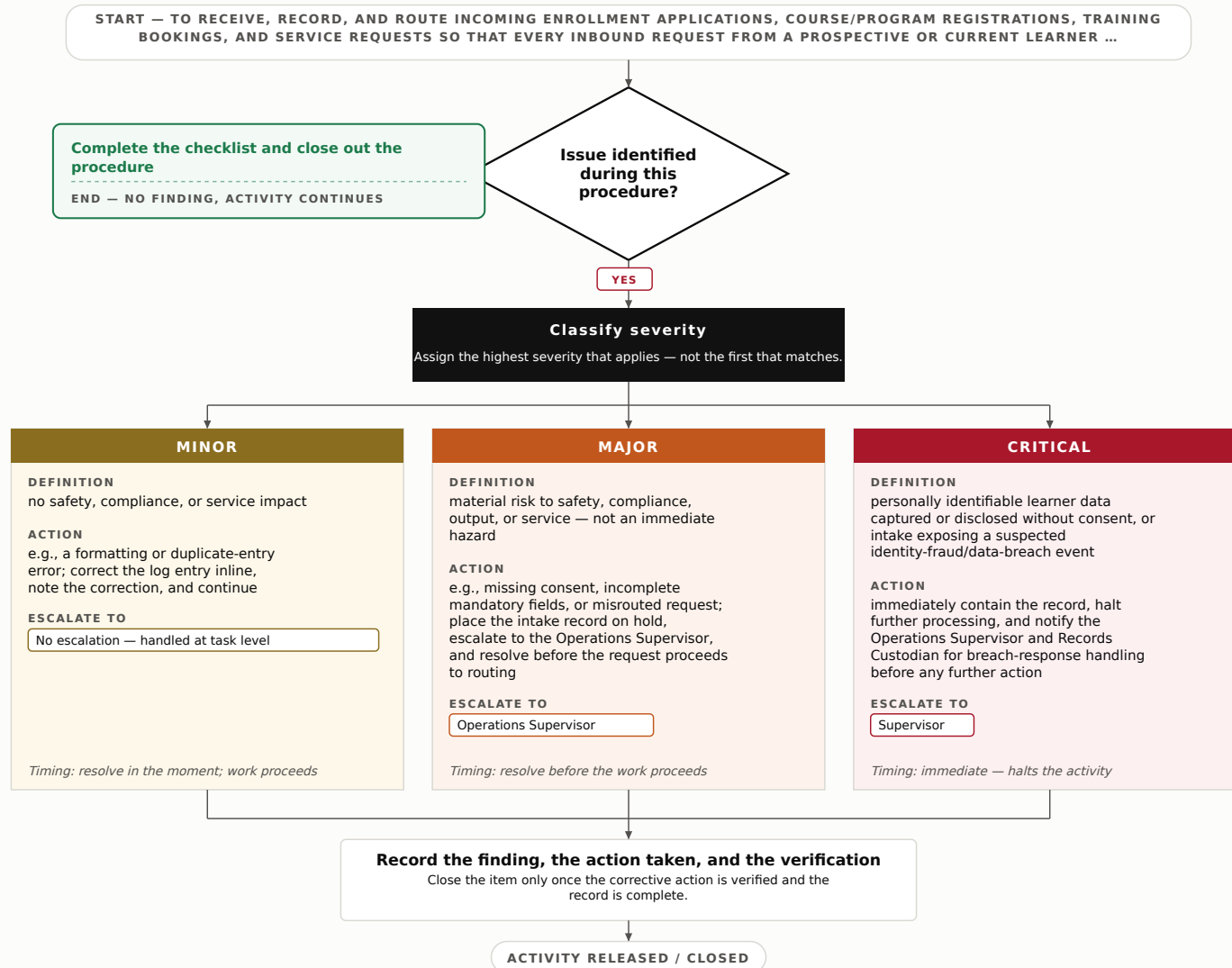
6. Process Flow



7. Step-by-Step Procedure

1. Receive the incoming request through the designated channel; note channel, date, and time of receipt.
2. Confirm the requester's identity and capture required contact fields (name, preferred contact, sponsoring organization if applicable, and requested program/service).
3. Confirm the requester has been presented the applicable consent/privacy notice before recording personally identifiable information; do not record data absent consent.
4. Create a new intake record in the registration / student information system and assign a unique tracking ID.
5. Classify the request type (new enrollment, re-registration, training booking, information request, service/support request) and assign a priority based on requested start date.
6. Verify completeness of mandatory fields; flag missing items and request them from the requester before routing.
7. Route the logged record to the responsible program area for acceptance/capability review per OD-007, and send the requester an acknowledgment containing the tracking ID.
8. Document the intake action, timestamp, and routing destination in the intake log to close out this procedure.

8. Decision Tree

Decision Tree — Customer Order / Work Request Intake**READING THIS TREE**

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every request has a unique tracking ID and recorded receipt channel/timestamp.
- Consent/privacy notice confirmed before any PII was recorded.
- All mandatory fields complete and requester acknowledgment sent.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Request logged with unique tracking ID		
Requester identity and contact fields verified		
Consent/privacy notice confirmed before PII capture		
Request type and priority correctly classified		
Mandatory fields complete; missing items flagged		
Record routed to correct program area (per OD-007)		
Acknowledgment with tracking ID sent to requester		

11. KPIs

- Intake logging accuracy (records with all mandatory fields correct) $\geq 98\%$
- Acknowledgment sent to requester within 1 business day $\geq 95\%$
- Consent-confirmed-before-capture compliance = 100%

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-007 — Order Verification & Acceptance Review

Estimated completion time: 30-90 minutes per enrollment/contract request

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To confirm that each incoming training/enrollment request — its scope, curriculum specification, delivery capability, and contract terms — can be met by the institution before the commitment is accepted, so that no student, cohort, or client contract is onboarded against instruction the institution cannot lawfully or practically deliver.

2. Scope

Covers verification and acceptance review of incoming enrollment agreements, cohort contracts, and program-delivery orders across classroom, lab, and field-based instruction. Excludes order logging (see OD-006) and scheduling/calendar placement (see OD-008), which are authored in their own modules.

3. Responsibilities

- Operations Coordinator — receives the request, verifies scope and terms against the published program catalog and available capacity, and prepares the acceptance packet.
- Program Director (Academic/Operations) — confirms curriculum specification, credential/prerequisite eligibility, and instructor/facility capability; approves or declines acceptance.
- Compliance/Accreditation Liaison — verifies that accepted terms conform to accreditation, licensing, and consumer-disclosure obligations before release.

4. Required PPE & Lockout/Tagout

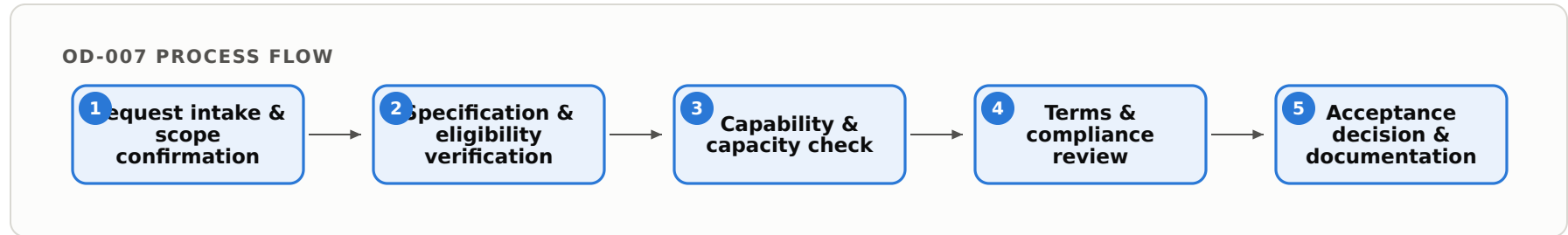
- Standard facility PPE (none required for this administrative review; observe standard facility conduct if review occurs in an active lab or shop area).
- Not applicable — no hazardous energy involved.

5. Regulatory References

- 34 CFR Part 668 (Student Assistance General Provisions — including consumer disclosure and enrollment-agreement requirements applicable to Title IV-participating institutions)
- FTC Act §5 / 16 CFR Part 254 (prohibition on deceptive practices in the offering of instruction and program claims)

- Applicable state education/licensing board and private-occupational-school authorization requirements governing enrollment agreements and refund terms
- Institutional accreditation standards and internal enrollment-agreement policy
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

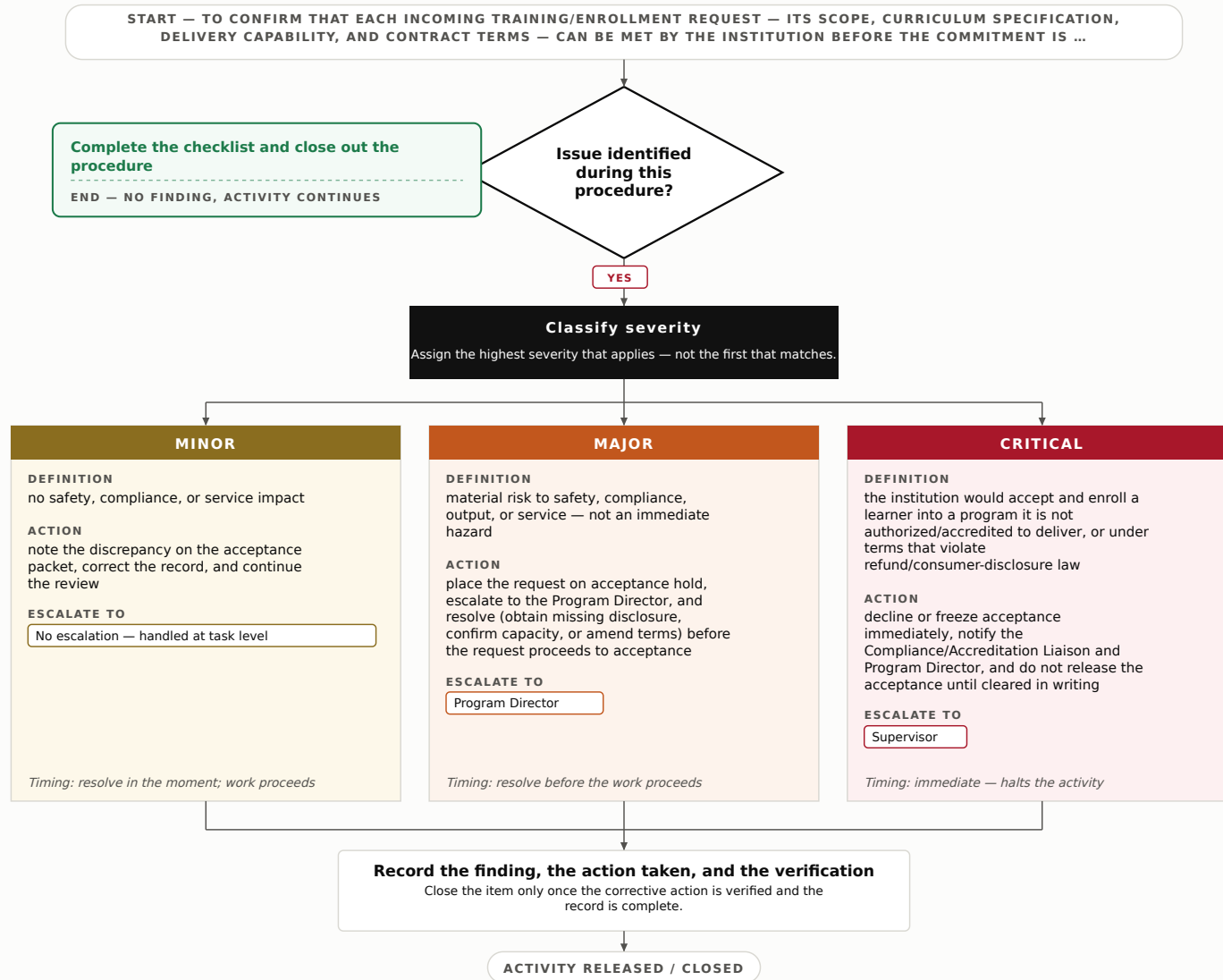


7. Step-by-Step Procedure

1. Retrieve the logged request (per OD-006) and confirm the requested program, cohort size, delivery mode (classroom, lab, or field), and requested start window are complete and legible.
2. Match the requested scope against the published program catalog; confirm the offering exists, is currently authorized, and matches what the requester expects (contact hours, credential/certificate awarded, delivery location).
3. Verify curriculum specification with the Program Director — required contact/lab hours, prerequisites, and any regulator-mandated content are met by the standard program of record.
4. Confirm learner/client eligibility — prerequisites, prior credentials, and any required background or physical eligibility clauses (where the service line operates equipment or vehicles) are documented.
5. Perform the capability & capacity check — confirm qualified instructor availability, seat/lab-station capacity, and required consumables and materials are on hand; verify inbound instructional materials and equipment are secured from suppliers (see NAICS touchpoints) before commitment.
6. Review contract terms with the Compliance/Accreditation Liaison — tuition, refund/cancellation schedule, required consumer disclosures, and any regulator-mandated language are present and accurate.
7. Record the acceptance decision (accept / accept-with-conditions / decline) and rationale; route accepted requests to scheduling (OD-008) without duplicating that module's steps.
8. File the completed acceptance packet, checklist, and signatures in the enrollment record.

8. Decision Tree

Decision Tree — Order Verification & Acceptance Review



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Requested scope matched line-by-line to an authorized catalog offering.
- Curriculum specification and learner eligibility confirmed by the Program Director.
- Instructor, seat/lab, and materials capacity confirmed available for the requested window.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Requested program exists and is currently authorized in the catalog		
Contact/lab hours and credential awarded match specification		
Learner prerequisites and eligibility documented		
Qualified instructor and seat/lab capacity confirmed for window		
Required instructional materials/equipment secured or on hand		
Tuition, refund schedule, and consumer disclosures present and accurate		
Acceptance decision and rationale recorded and signed		

11. KPIs

- Acceptance reviews completed within 2 business days of intake: $\geq 95\%$
- Accepted orders later reversed for scope/capability mismatch: $\leq 2\%$
- Acceptance packets with complete required disclosures at first review: $\geq 98\%$

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-008 — Job Scheduling & Sequencing

Estimated completion time: 45-90 minutes per scheduling cycle

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To place accepted instructional work — cohorts, courses, lab or clinical sessions, and assessment blocks — into the operating schedule in the correct order against student priority, required contact/instructional hours, and program due dates, so committed learning outcomes are delivered on time and within capacity.

2. Scope

Covers sequencing of accepted, enrollment-confirmed sessions into the master schedule across instructional spaces and time blocks, including precedence rules (prerequisites, required hour sequences) and due-date protection. Excludes assignment of specific instructors, rooms, or equipment to sessions, which is covered under OD-009; excludes maintenance scheduling of facilities and training equipment, covered under PM-008.

3. Responsibilities

- Operations Scheduler — builds and sequences the master schedule; applies priority and due-date logic; logs conflicts.
- Program Operations Lead — approves sequence exceptions, resolves priority disputes, verifies contact-hour compliance.
- Registrar / Records Coordinator — confirms enrollment counts, prerequisite completion, and required-hour totals feeding the schedule.

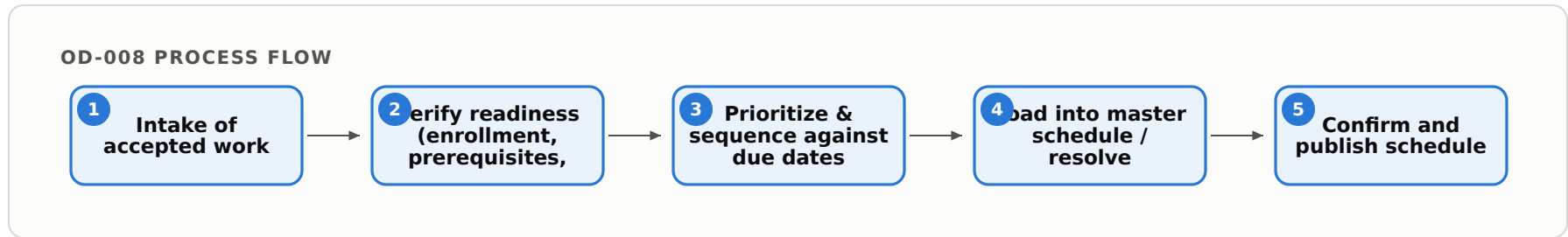
4. Required PPE & Lockout/Tagout

- Standard facility PPE only; this is an administrative coordination task performed at a workstation.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. §1232g / 34 CFR Part 99 — protects student-identifiable enrollment and scheduling records handled in this task.
- 34 CFR Part 668 (Student Assistance General Provisions) — where the institution participates in Title IV, governs defined program length and clock/credit-hour requirements that constrain sequencing (e.g., minimum instructional hours per program).
- Applicable state education agency / licensing board program-approval rules governing minimum contact hours and course sequence for each licensed program (e.g., cosmetology, flight, or trade-school hour requirements).
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

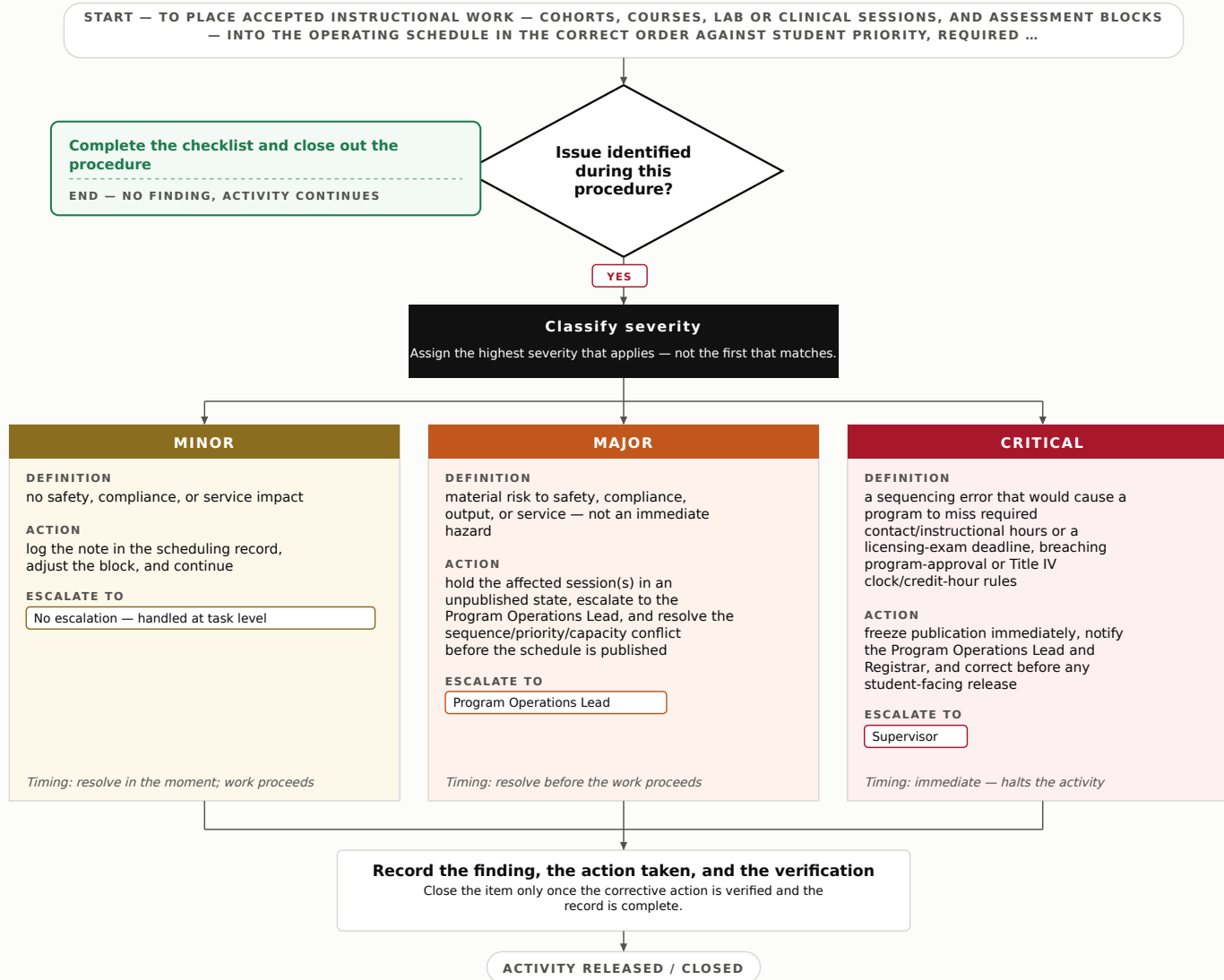


7. Step-by-Step Procedure

1. Pull the queue of accepted, enrollment-confirmed sessions from the intake log; confirm each carries a program, required-hour target, and due/completion date.
2. With the Registrar, verify prerequisites are met and required contact/instructional hours are defined for each session before it is eligible to schedule.
3. Assign priority: rank by hard due dates (program completion, licensing-exam windows, cohort start commitments), then by prerequisite dependency order.
4. Sequence dependent sessions so precedence is preserved (no session placed before its prerequisite or required-hour predecessor).
5. Load sessions into the master schedule against available time blocks and space capacity; do not assign named instructors, rooms, or equipment (route to OD-009).
6. Detect and resolve conflicts (double-booked blocks, capacity overruns, due-date collisions); apply the Decision Tree for any that cannot be cleared.
7. Obtain Program Operations Lead approval for any sequence exception or priority override.
8. Publish the confirmed schedule to affected staff and students, and record the final sequence, priority basis, and approvals in the scheduling record.

8. Decision Tree

Decision Tree — Job Scheduling & Sequencing



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every scheduled session traces to an accepted, enrollment-confirmed intake record.
- Prerequisite and required-hour precedence verified for all dependent sessions.
- No due-date or capacity conflict remains open in the published schedule.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
All queued sessions have program, hour target, and due date		
Prerequisites confirmed with Registrar		
Priority ranking applied against hard due dates		
Precedence/sequence preserved for dependent sessions		
No capacity overruns or double-booked blocks		
Sequence exceptions approved by Program Operations Lead		
Final schedule and priority basis recorded		

11. KPIs

- On-time program completion (sessions sequenced to meet due date): $\geq 98\%$
- Scheduling conflicts remaining at publication: 0
- Required-hour precedence errors per cycle: 0

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-009 — Resource & Capacity Allocation

Estimated completion time: 45-90 minutes per scheduling cycle (session, term, or cohort block)

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To match confirmed instructional demand (courses, cohorts, sessions, or training blocks) against the real availability of qualified instructors, teaching equipment, and physical or virtual learning spaces, so that every scheduled unit of work has verified, non-conflicting resources before delivery begins.

2. Scope

Covers the assignment and capacity confirmation of instructional personnel slots, teaching/training equipment, and classroom, lab, shop, studio, simulator, or online seat capacity to already-scheduled work at an Educational Services provider. Excludes staffing presence and attendance confirmation (see OD-003) and schedule sequencing/timetable ordering (see OD-008).

3. Responsibilities

- Operations Scheduling Coordinator — builds the resource-to-session allocation, confirms room/seat and equipment availability, resolves conflicts, and records the final allocation.
- Facilities & Equipment Lead — verifies physical/virtual space occupancy limits and confirms teaching equipment is functional and reserved; flags unavailable resources.
- Program/Operations Manager — approves allocations that exceed capacity thresholds, authorizes overflow or substitute resources, and owns escalations.

4. Required PPE & Lockout/Tagout

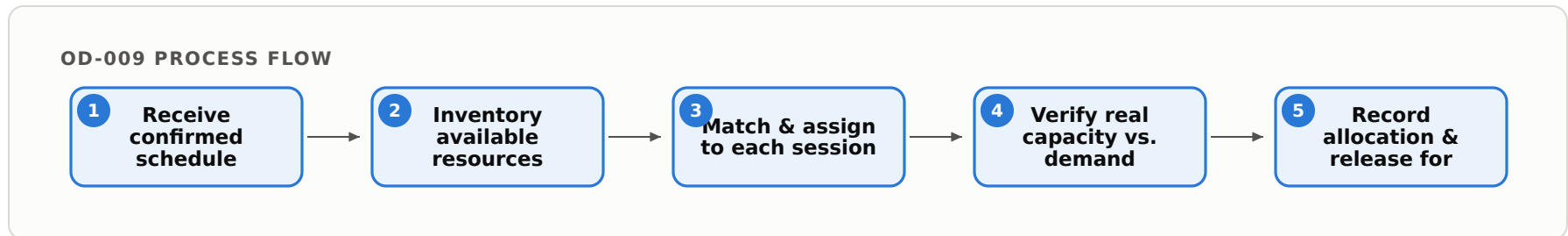
- Standard facility PPE only; where the service line operates hands-on shop, lab, or vehicle/simulator equipment (e.g., trade, cosmetology, or flight programs), apply that program's designated PPE when physically inspecting equipment prior to allocation.
- Not applicable — this is an administrative allocation task involving no hazardous energy; any physical equipment servicing is out of scope and referred to the Facilities & Equipment Lead.

5. Regulatory References

- Americans with Disabilities Act (ADA), 42 U.S.C. §12181 et seq., and 2010 ADA Standards for Accessible Design — accessible seating, room, and equipment access must be reflected in every allocation.

- Applicable fire/life-safety occupancy limits under the adopted local fire code (typically NFPA 101 Life Safety Code as adopted by the Authority Having Jurisdiction) — governs maximum room/space occupant load.
- State education/licensing or accrediting authority capacity and ratio requirements applicable to the provider's authorization (e.g., state department of education, state board governing cosmetology/barber, trade, or driver/flight training, or the provider's recognized accreditor).
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

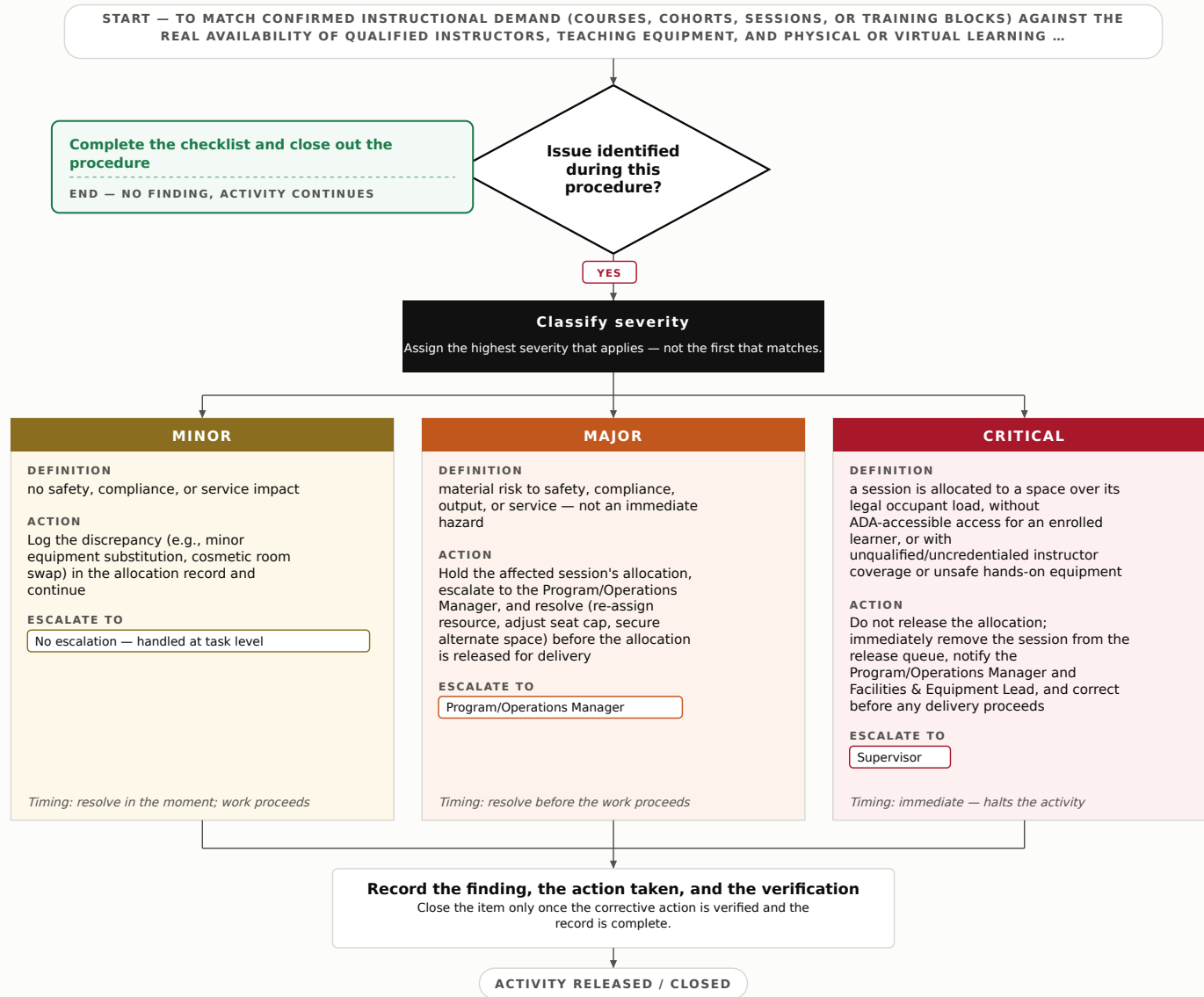


7. Step-by-Step Procedure

1. Pull the confirmed list of scheduled sessions/cohorts for the target period from the schedule of record (sequencing owned by OD-008; do not re-order here).
2. Inventory available instructional personnel slots by required qualification/credential, available teaching equipment (from 334310 audio/video and program-specific kits), and available spaces with their posted occupant loads.
3. For each session, assign a qualified instructor slot, the required equipment set, and a space whose occupancy limit meets or exceeds enrolled/expected headcount.
4. Confirm capacity is real: cross-check each space against the posted occupant load and ADA accessible-seat count; confirm each equipment item is reserved, functional, and not double-booked; verify no resource is assigned to two concurrent sessions.
5. Reconcile demand-to-capacity gaps — identify over-subscribed sessions, under-resourced rooms, or missing equipment; propose splits, substitutions, or overflow spaces.
6. Route any allocation exceeding a capacity threshold or requiring substitution to the Program/Operations Manager for approval.
7. Lock the final allocation in the scheduling system and notify affected instructors and the Facilities & Equipment Lead.
8. Record the confirmed allocation, capacity checks, approvals, and any exceptions in the operations log/retained records.

8. Decision Tree

Decision Tree — Resource & Capacity Allocation



READING THIS TREE

No finding

Activity stands. Complete the checklist and continue.

Minor

Handled in place at task level; no escalation.

Major

Supervisory decision required before the next stage.

Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every scheduled session has an assigned qualified instructor slot, equipment set, and space.
- Each assigned space's expected headcount is at or below posted occupant load with required ADA-accessible seating.
- No instructor, equipment item, or space is double-booked across concurrent sessions.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
All scheduled sessions have a resource allocation		
Assigned spaces within posted occupant load		
ADA-accessible seating/access confirmed where required		
Instructor qualification matches session requirement		
Required teaching equipment reserved and functional		
No double-booked person, equipment, or space		
Threshold/substitution exceptions approved and logged		

11. KPIs

- Sessions with confirmed complete allocation before delivery start: $\geq 99\%$
- Occupancy/capacity overbooking incidents per period: 0
- Allocation conflicts (double-booking) detected after release: $\leq 1\%$

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-010 — Incoming Material / Supply Verification

Estimated completion time: 20-45 minutes per delivery

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To confirm that inbound instructional and operational materials — textbooks and printed course packs, office and classroom consumables, and audio/video and IT equipment — arrive matching what was ordered, in the correct quantity, and free of visible damage before they are accepted into the institution's custody, so that classes, programs, and administrative operations are not disrupted.

2. Scope

Covers verification of all inbound materials and supplies received at any campus, training site, or administrative facility against the originating purchase order, packing list, quantity, and outward condition. Excludes spec-conformance / functional testing (covered under QC-003), putaway and storage placement (covered under WH-006), and the formal dock count (covered under SH-008).

3. Responsibilities

- Receiving Coordinator — performs the PO match, quantity reconciliation, and visible-condition check; records findings and signs off acceptance.
- Operations Supervisor — resolves discrepancies, authorizes conditional acceptance or return, and escalates supplier issues.
- Procurement / Business Office Lead — owns the purchase order of record, contacts vendors on shortages or damage, and approves claims or credits.

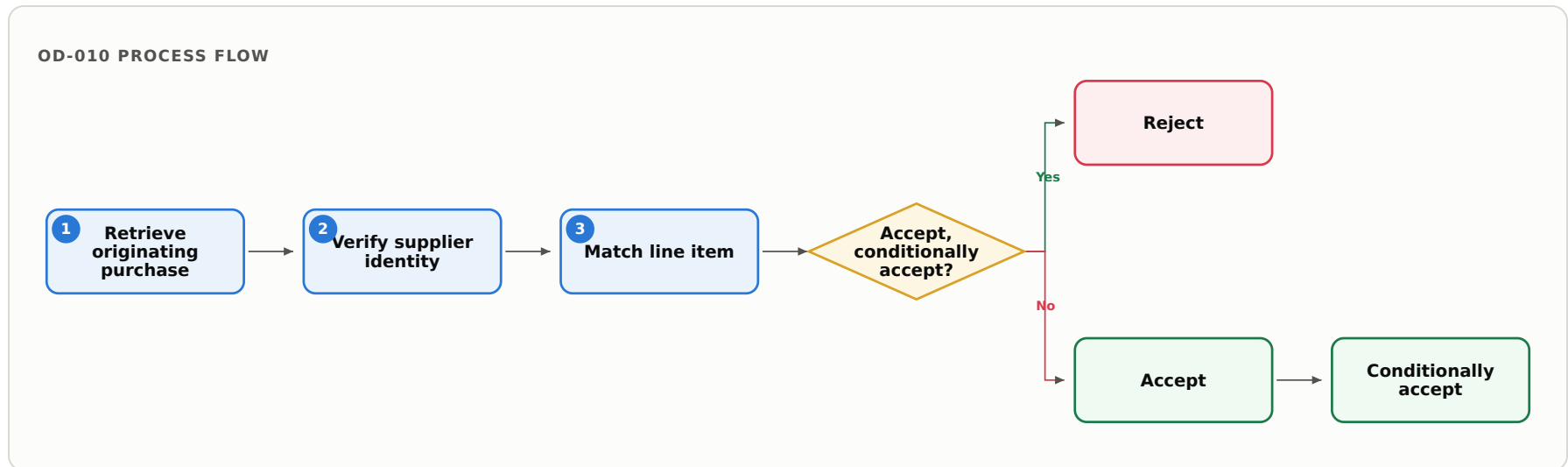
4. Required PPE & Lockout/Tagout

- Standard facility PPE: closed-toe footwear and cut-resistant gloves when opening cartons; back-support practice for parcels over safe manual-lift limits.
- Not applicable — no hazardous energy involved. Do not power on or energize AV/IT equipment during this verification; functional testing is handled under QC-003.

5. Regulatory References

- None sector-specific govern inbound material verification across the full span; internal procurement and receiving policy applies. Applicable general references include OSHA General Duty Clause (29 U.S.C. §654) and 29 CFR 1910.176 for materials handling and safe storage aisles, plus institutional purchasing/records-retention policy. Where a delivery contains regulated items (e.g., cosmetology chemicals or flight-training fuels/lubricants), apply the OSHA Hazard Communication Standard (29 CFR 1910.1200) and confirm Safety Data Sheets accompany the shipment. Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

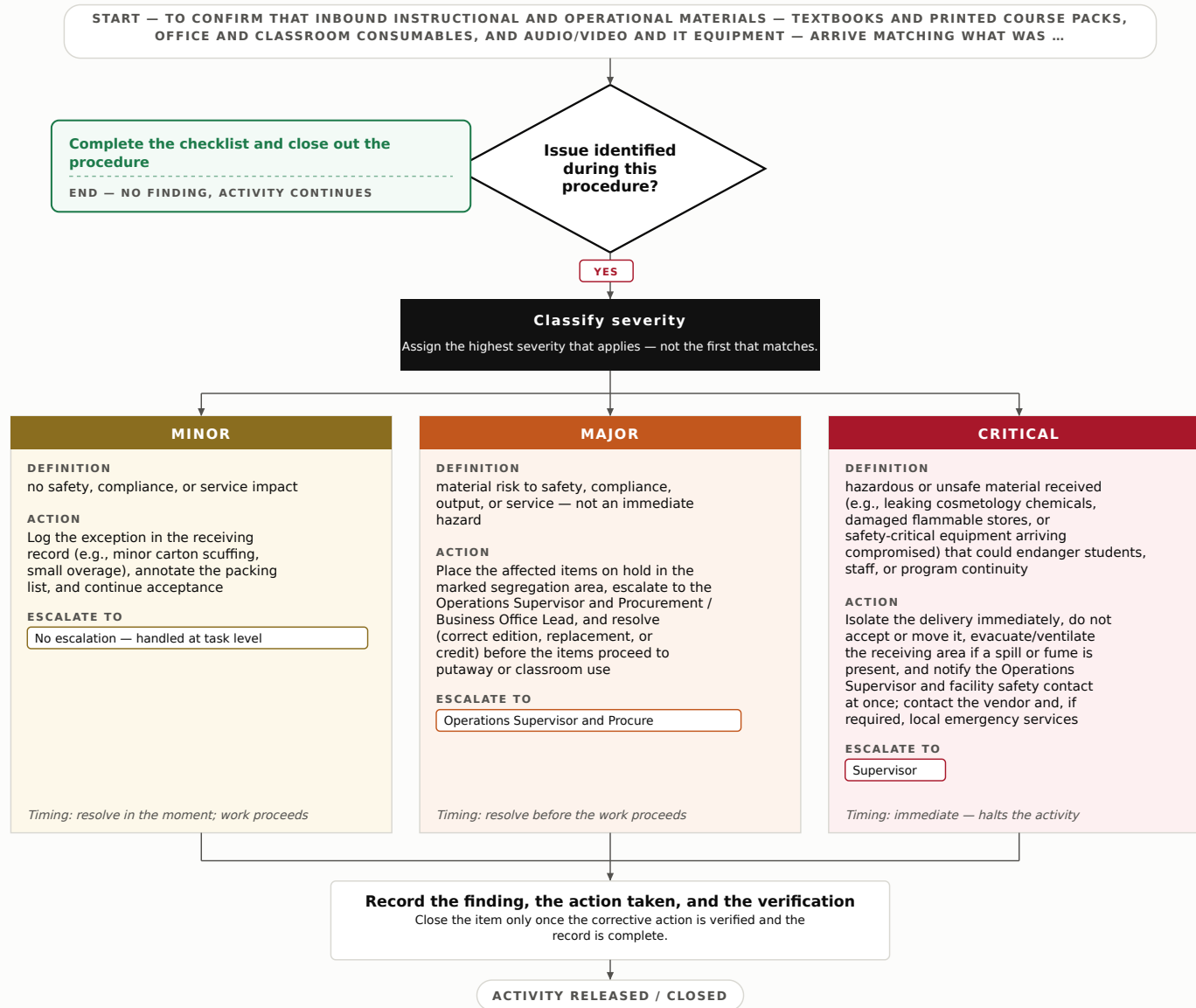


7. Step-by-Step Procedure

1. Retrieve the originating purchase order and packing list; confirm the shipment is addressed to this facility and intended for a current order.
2. Verify supplier identity and PO number on the shipping documents match the internal PO of record.
3. Match each line item on the packing list to the PO — item description, catalog/SKU, and edition or model number (e.g., correct textbook edition, correct AV/IT model).
4. Reconcile quantities: count cartons and unit counts against the packing list and PO; note shortages, overages, or substitutions.
5. Inspect outward condition: check for crushed, wet, or punctured cartons, broken seals, and visible damage to contents; for regulated items, confirm SDS/labeling is present. Do not energize or functionally test equipment (see QC-003).
6. Segregate any damaged, short, or mismatched items into a marked hold area pending resolution.
7. Determine disposition: accept, conditionally accept, or reject; classify any issue per Section 8.
8. Record results in the receiving log — PO number, date, quantities received, condition, exceptions, and signatures — and route accepted items to putaway (WH-006).

8. Decision Tree

Decision Tree — Incoming Material / Supply Verification



READING THIS TREE

No finding

Activity stands. Complete the checklist and continue.

Minor

Handled in place at task level; no escalation.

Major

Supervisory decision required before the next stage.

Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- PO number, supplier, and destination facility confirmed before unpacking.
- Line items and editions/models matched to PO; substitutions flagged.
- Quantities reconciled and all shortages/overages documented.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Shipment matches an active PO and correct facility		
Packing list line items match PO descriptions/SKUs		
Editions/models correct (textbooks, AV/IT, consumables)		
Quantities reconciled — no unlogged shortage/overage		
Cartons intact; no visible damage, wetness, or broken seals		
SDS/labeling present for any regulated items		
Disposition recorded and exceptions routed		

11. KPIs

- PO-to-receipt match accuracy $\geq$ 98%
- Verification completed within 1 business day of delivery $\geq$ 95%
- Undocumented discrepancies reaching putaway 0

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

Phase 3 — Execution

OD-011 — Standard Work Execution & Process Adherence

Estimated completion time: 30-60 minutes per session or instructional cycle observed

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure ensures that instructional and operational sessions are delivered according to the institution's documented method, approved curriculum sequence, and published program schedule, and that any departure from the defined method is identified and recorded so learning outcomes and program integrity are preserved.

2. Scope

Covers execution of scheduled instructional and lab/practical sessions against the approved lesson plan, curriculum map, and delivery method for all program lines at this institution, including deviation identification and logging. Excludes in-process learner competency/quality checks, which are covered under QC-007, and safe-work method for lab/practical equipment, which is covered under SD-005.

3. Responsibilities

- Instructional Lead / Lead Instructor — delivers the session to the approved method, curriculum sequence, and clock-hour plan; identifies and logs deviations.
- Program Coordinator (Operations) — verifies session adherence against the master schedule and curriculum map; dispositions logged deviations.
- Operations Compliance Officer — confirms deviations affecting accreditation, attendance, or clock-hour integrity are contained and corrected before records release.

4. Required PPE & Lockout/Tagout

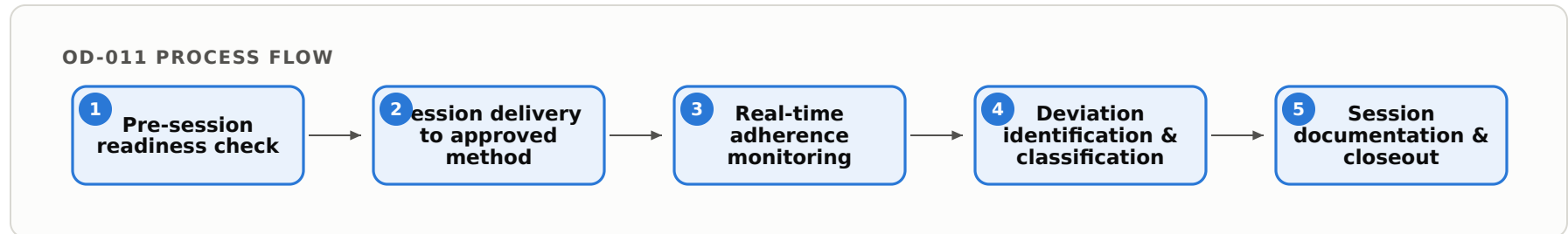
- Standard facility PPE; where the program line operates practical/lab stations (e.g., cosmetology floor, trade shop, flight simulator bay), wear the station-specific PPE defined in that line's method.
- Not applicable — no hazardous energy controlled under this procedure; equipment energy control is handled under SD-005.

5. Regulatory References

- Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. §1232g / 34 CFR Part 99 (protection of student records referenced during session documentation).
- Applicable state education/licensing board or agency authorization governing approved curriculum, clock-hour, and instructional-method requirements for the program (varies by state and program line).

- Institutional accreditation standards of the applicable recognized accrediting agency (session delivery to approved method and hours).
- None additional sector-wide; internal instructional-delivery policy applies where no external standard governs.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

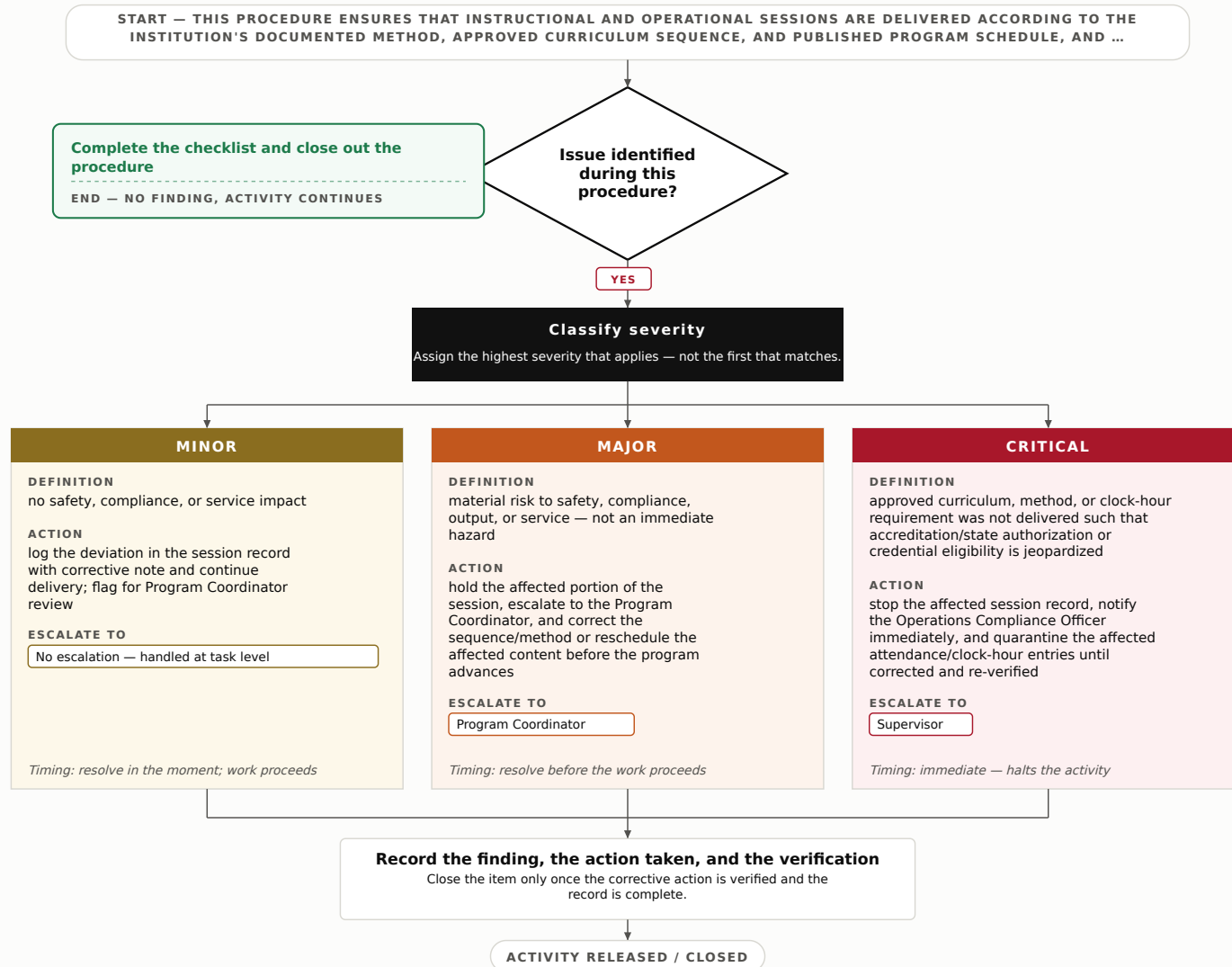


7. Step-by-Step Procedure

1. Retrieve the approved lesson plan, curriculum map, and session schedule for the program line; confirm the version is current.
2. Verify required materials and media are on hand — printed course/handout sets, workbooks, audio/video and projection equipment — and functional before start.
3. Confirm attendance/clock-hour roster is loaded and the session start time matches the published schedule.
4. Deliver the session following the defined instructional method, topic sequence, and pacing in the approved plan.
5. Monitor adherence throughout: compare actual coverage and time-on-topic against the plan at defined intervals.
6. Identify any deviation from method, sequence, hours, or materials; classify it per the Decision Tree.
7. Record contact/clock hours, topics covered, and any deviation in the session log; route the log to the Program Coordinator.
8. Complete the Inspection Checklist and close out the session record; ensure student-identifiable entries are handled per FERPA.

8. Decision Tree

Decision Tree — Standard Work Execution & Process Adherence



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Approved lesson plan and curriculum version confirmed current before start.
- Actual topic coverage and pacing match the approved sequence at each monitoring interval.
- Contact/clock hours recorded match scheduled hours and roster.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Current approved lesson plan / curriculum map in use		
Required printed materials and A/V media present and functional		
Session started per published schedule		
Topic sequence and pacing followed as documented		
Clock/contact hours recorded and reconciled to roster		
Deviations logged and classified		
Session record closed and routed per FERPA		

11. KPIs

- Session method-adherence rate $\geq$ 98% of scheduled sessions delivered to approved plan.
- Clock/contact hour reconciliation accuracy = 100% against roster.
- Critical deviations reaching student records = 0 per term.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-012 — Work-in-Progress Tracking & Status Update

Estimated completion time: 20–40 minutes per tracking cycle (typically daily or per shift/session)

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To ensure the current status of every active instructional or training engagement — cohorts, courses, program milestones, and individual learner progression through clock-hour or competency requirements — is accurately recorded and visible to Operations staff, so that no active "job" (a learner or cohort in progress) stalls unnoticed.

2. Scope

Covers the capture, recording, and visible display of in-progress status for all active learner engagements and instructional deliveries managed by Operations. Excludes throughput measurement (completion rates, cycle-time analysis), which is covered under OD-014, and quality data on instructional outcomes, which is covered under QC-027.

3. Responsibilities

- Operations Coordinator — records and updates status of active engagements in the tracking system each cycle and maintains the visible status board.
- Program Delivery Lead — reviews flagged or stalled engagements, confirms accuracy of milestone/clock-hour entries, and authorizes status corrections.
- Records Custodian — safeguards learner status data, controls access permissions, and ensures entries meet confidentiality and retention requirements.

4. Required PPE & Lockout/Tagout

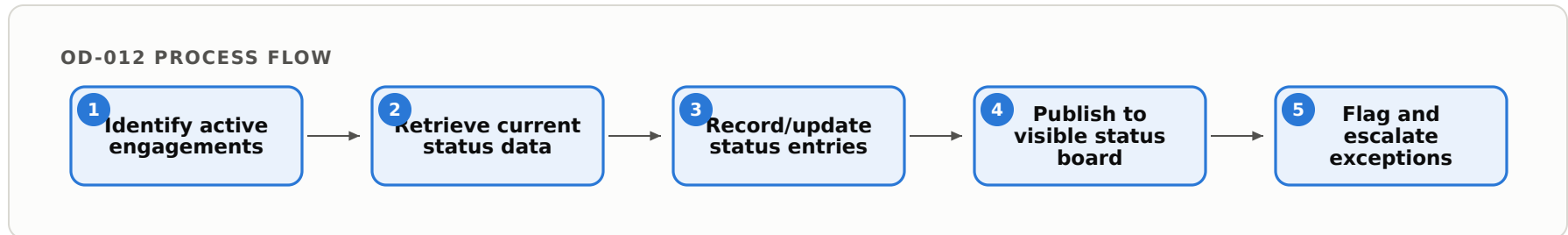
- Standard facility PPE only; this is an administrative records task with no additional PPE requirement.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. § 1232g / 34 CFR Part 99 — governs confidentiality and disclosure of learner records for all institutions receiving applicable federal funds; where an institution is fully private/non-participating, equivalent internal confidentiality policy applies.
- Applicable state education/licensing authority record-keeping rules requiring current documentation of learner enrollment and progress (e.g., state clock-hour or attendance verification requirements for licensed vocational and trade programs).

- Internal Operations records-control policy where no sector-specific statute applies.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

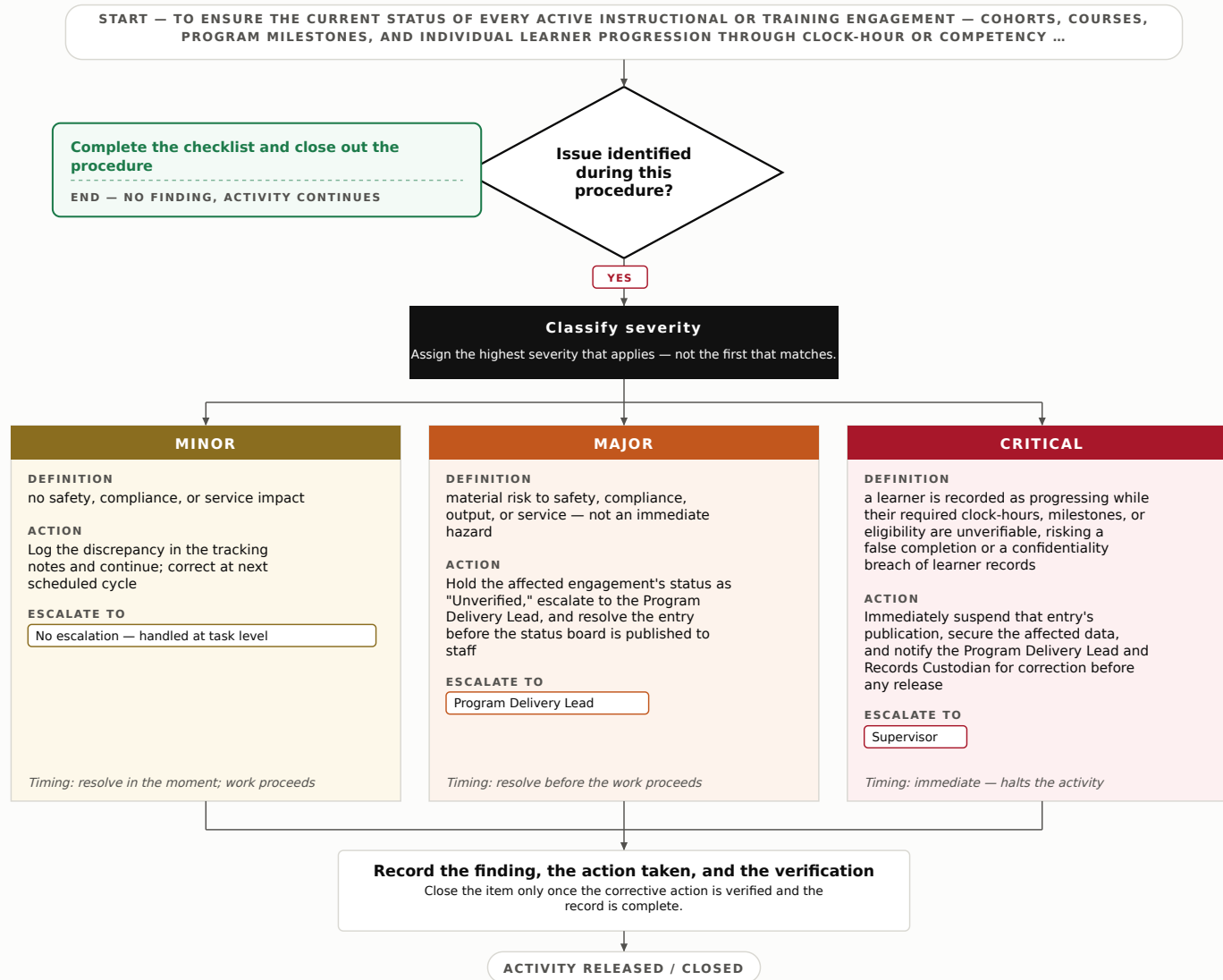
6. Process Flow



7. Step-by-Step Procedure

1. Compile the roster of all active engagements for the cycle (cohorts, courses, sessions, and individual learners currently in progress).
2. For each engagement, retrieve current status inputs from delivery staff — session/attendance logs, milestone or clock-hour completion, and next scheduled activity.
3. Record each engagement's current status in the tracking system using standard status codes (e.g., On Track, At Milestone, Behind Schedule, On Hold, Awaiting Action).
4. Note the last-updated timestamp and responsible instructor/facilitator for each entry.
5. Reconcile new entries against the prior cycle to identify engagements with no movement or missing updates.
6. Publish the updated status to the visible status board (physical board or shared dashboard) accessible to authorized Operations staff.
7. Flag any exception (stalled, on-hold, or unreconciled engagement) and route per the Decision Tree.
8. Save and date the updated tracking record; confirm access permissions restrict learner-identifying data to authorized personnel per Section 3.

8. Decision Tree

Decision Tree — Work-in-Progress Tracking & Status Update**READING THIS TREE**■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every active engagement has a status entry with a current-cycle timestamp.
- Status codes match the underlying delivery/attendance evidence.
- Learner-identifying data on the visible board is limited to authorized viewers.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
All active engagements listed for this cycle		
Each entry carries a current-cycle timestamp		
Status codes reconcile to attendance/milestone evidence		
No engagement stalled without a flag		
Status board published and legible to authorized staff		
Access permissions restrict learner-identifying data		
Exceptions escalated per Decision Tree		

11. KPIs

- Status currency: 100% of active engagements updated within the tracking cycle.
- Reconciliation accuracy: $\geq 98\%$ of entries match underlying delivery evidence on audit.
- Exception closure: 100% of flagged engagements resolved before next cycle publication.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-013 — Operational Handoff Between Work Stages

Estimated completion time: 15-30 minutes per handoff

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To ensure that instructional and operational work — course cohorts, lab or shop sessions, assessment blocks, and learner progress records — transfers cleanly between successive work stages, crews, or instructional teams so that no learning objective, safety condition, or completion record is dropped in the transition.

2. Scope

Covers the controlled transfer of active instructional or training work between sequential stages (e.g., theory-to-practical, one instructor block to the next, one operational crew to the incoming crew) at any Educational Services provider. Excludes shift handover between individuals covering the same post, which lives in OD-002, and stage quality release / conformance sign-off, which lives in QC-013.

3. Responsibilities

- Operations Coordinator — owns the handoff schedule, verifies the transfer packet is complete, and authorizes the stage-to-stage transition.
- Outgoing Lead Instructor / Crew Lead — assembles handoff documentation, states outstanding items and any learner or facility conditions, confirms transfer.
- Incoming Lead Instructor / Crew Lead — reviews the transfer packet, confirms readiness of resources and space, and accepts accountability for the next stage.

4. Required PPE & Lockout/Tagout

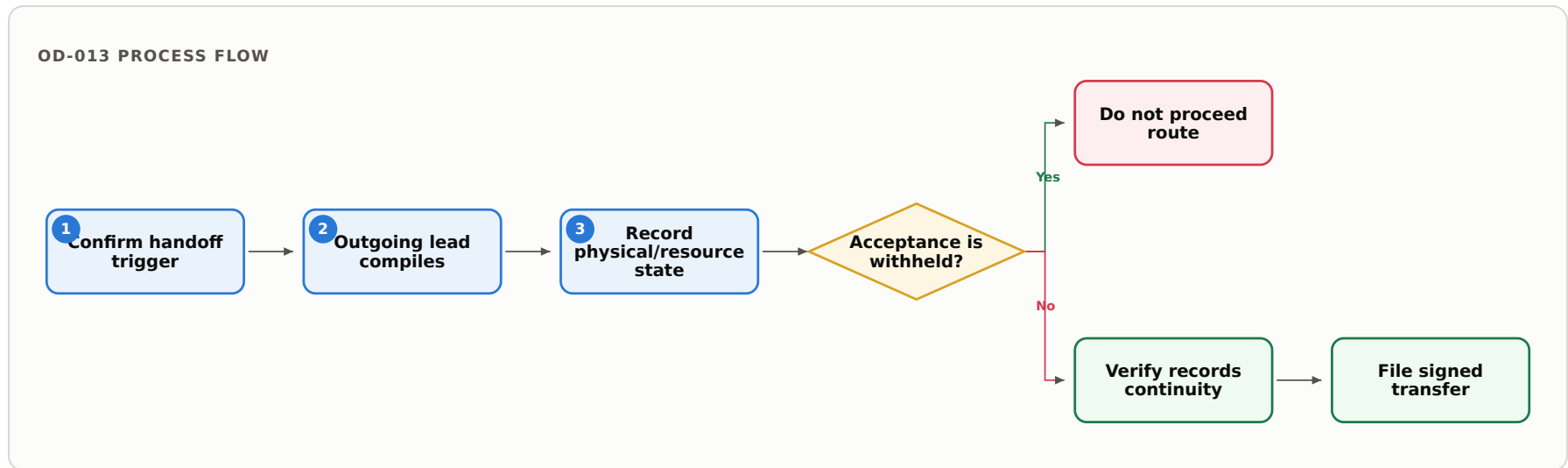
- Standard facility PPE only for handoffs conducted in general instructional spaces. Where the service line operates practical labs, shops, or vehicles (e.g., trade, cosmetology, or flight programs), incoming crew dons the PPE required for that stage before accepting the space.
- Not applicable to the handoff itself — no hazardous energy is transferred by this procedure. Where equipment remains energized at the transition point, energy state is confirmed and recorded on the transfer packet before acceptance.

5. Regulatory References

- Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. § 1232g / 34 CFR Part 99 — governs handling and transfer of learner education records at every handoff.
- OSHA General Duty Clause, 29 U.S.C. § 654(a)(1) — obligation to maintain a workplace free of recognized hazards across crew and stage transitions.

- Americans with Disabilities Act, 42 U.S.C. § 12181 et seq. — accommodations and access conditions must carry forward across stages.
- Applicable state education/licensing agency operating requirements for the institution (e.g., state board approval conditions for the program type).
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow



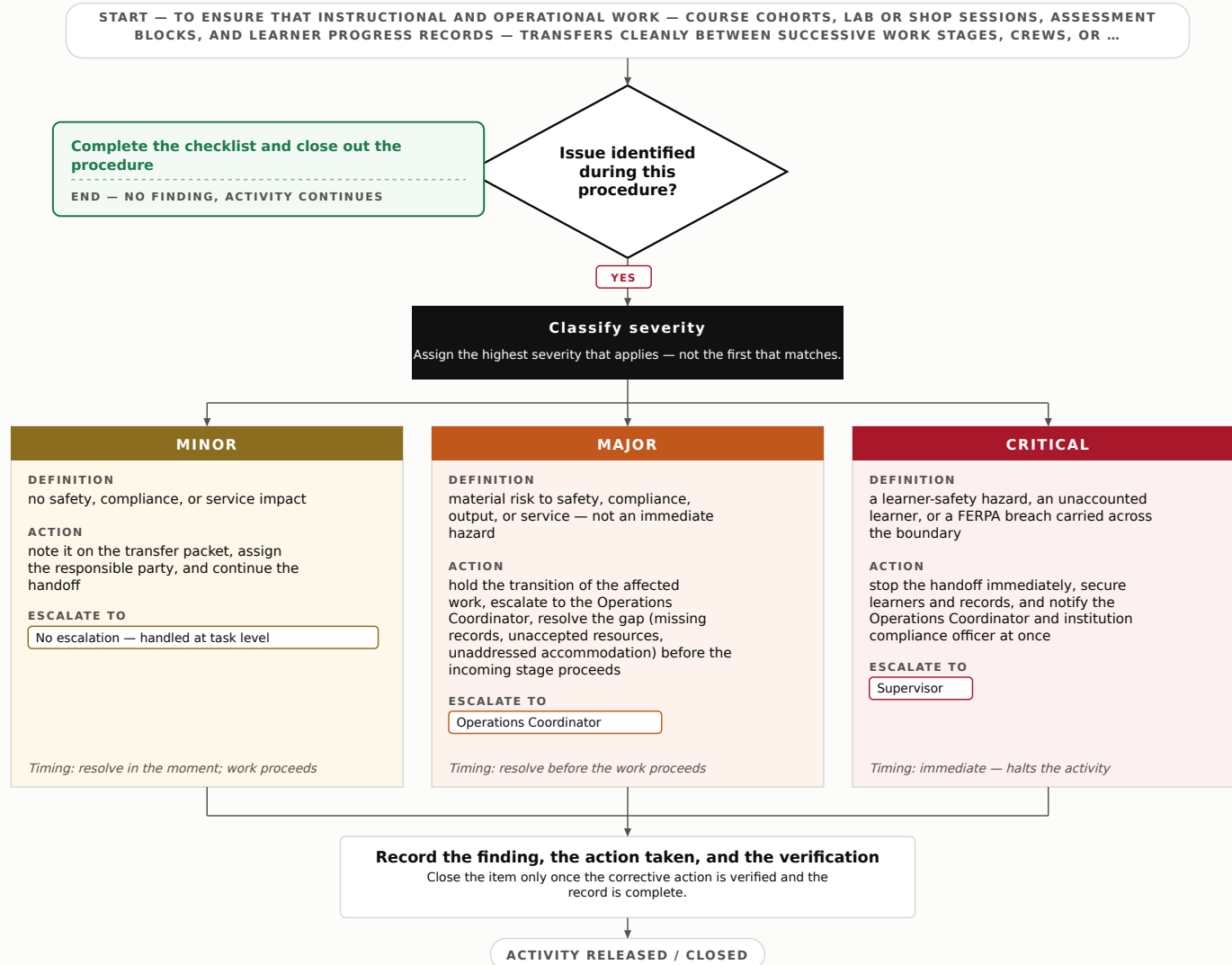
7. Step-by-Step Procedure

1. Confirm the handoff trigger: a scheduled stage boundary, crew rotation, or instructional block transition has been reached per the Operations schedule.
2. Outgoing lead compiles the transfer packet: current learner roster and attendance status, progress against stated learning objectives, outstanding assessments, and any pending accommodations.
3. Record the physical/resource state: space, printed materials, and audio/video equipment status; note any missing, damaged, or reserved resources.
4. Flag open items and risks: incomplete modules, at-risk learners, facility conditions, or equipment awaiting service — with responsible party for each.
5. Conduct joint review: outgoing and incoming leads walk the packet together; incoming lead confirms resources, space readiness, and any PPE needs for the next stage.
6. Incoming lead formally accepts accountability; Operations Coordinator authorizes the transition. If acceptance is withheld, do not proceed — route per the Decision Tree.
7. Verify records continuity: confirm all learner-record entries are complete and FERPA-protected data transferred only to authorized personnel.

8. File the signed transfer packet in the operations record and log the handoff time, participants, and outcome.

8. Decision Tree

Decision Tree — Operational Handoff Between Work Stages



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Transfer packet complete and reviewed by both leads before acceptance.
- Learner roster reconciled — every learner accounted for at the boundary.
- Resource and equipment state confirmed and any open items assigned.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Transfer packet assembled and legible		
Learner roster/attendance reconciled		
Progress against learning objectives recorded		
Outstanding accommodations documented and carried forward		
Space, printed materials, and A/V equipment state confirmed		
Incoming lead formally accepted accountability		
Learner records transferred only to authorized personnel (FERPA)		

11. KPIs

- On-time handoffs (completed within scheduled window): $\geq 95\%$
- Handoffs with complete transfer packet on first review: $\geq 98\%$
- Continuity defects (dropped records, learners, or accommodations) per 100 handoffs: ≤ 1

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-014 — Output Monitoring & Throughput Review

Estimated completion time: 45-90 minutes per review cycle

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

Establish a repeatable method for monitoring the rate and volume of instructional and program output — sessions delivered, clock/seat hours completed, cohort progression, and course/module completions — against the published delivery plan so shortfalls or overruns are detected early and corrected. This protects delivery commitments to enrolled learners and sponsors across all program types.

2. Scope

Covers periodic monitoring of operational throughput (scheduled vs. actual instructional units delivered, learner progression pace, and resource-driven capacity constraints) for all program lines at the institution. Excludes KPI target-setting and performance-indicator review, which is covered under OD-028; excludes process-capability analysis, which is covered under QC-026.

3. Responsibilities

- Operations Coordinator — pulls throughput data each cycle, compares actual output against the delivery plan, and logs variances.
- Program Delivery Lead — reviews flagged variances, authorizes schedule or resource adjustments, and confirms corrective actions.
- Records & Compliance Administrator — verifies that logged output reconciles with attendance/seat-hour records required for the institution's licensure and funding basis.

4. Required PPE & Lockout/Tagout

- Standard facility PPE; none specific to this administrative monitoring task.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. §1232g / 34 CFR Part 99 — governs handling of learner records referenced in throughput data across all member institutions.
- Applicable state education/licensing authority requirements governing minimum instructional hours, program completion, and enrollment reporting (e.g., state board of education, state postsecondary/proprietary-school authorization board, or the relevant occupational licensing board for the program).
- Where the institution participates in Federal student aid: 34 CFR Part 668 satisfactory-academic-progress and enrollment-status provisions.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

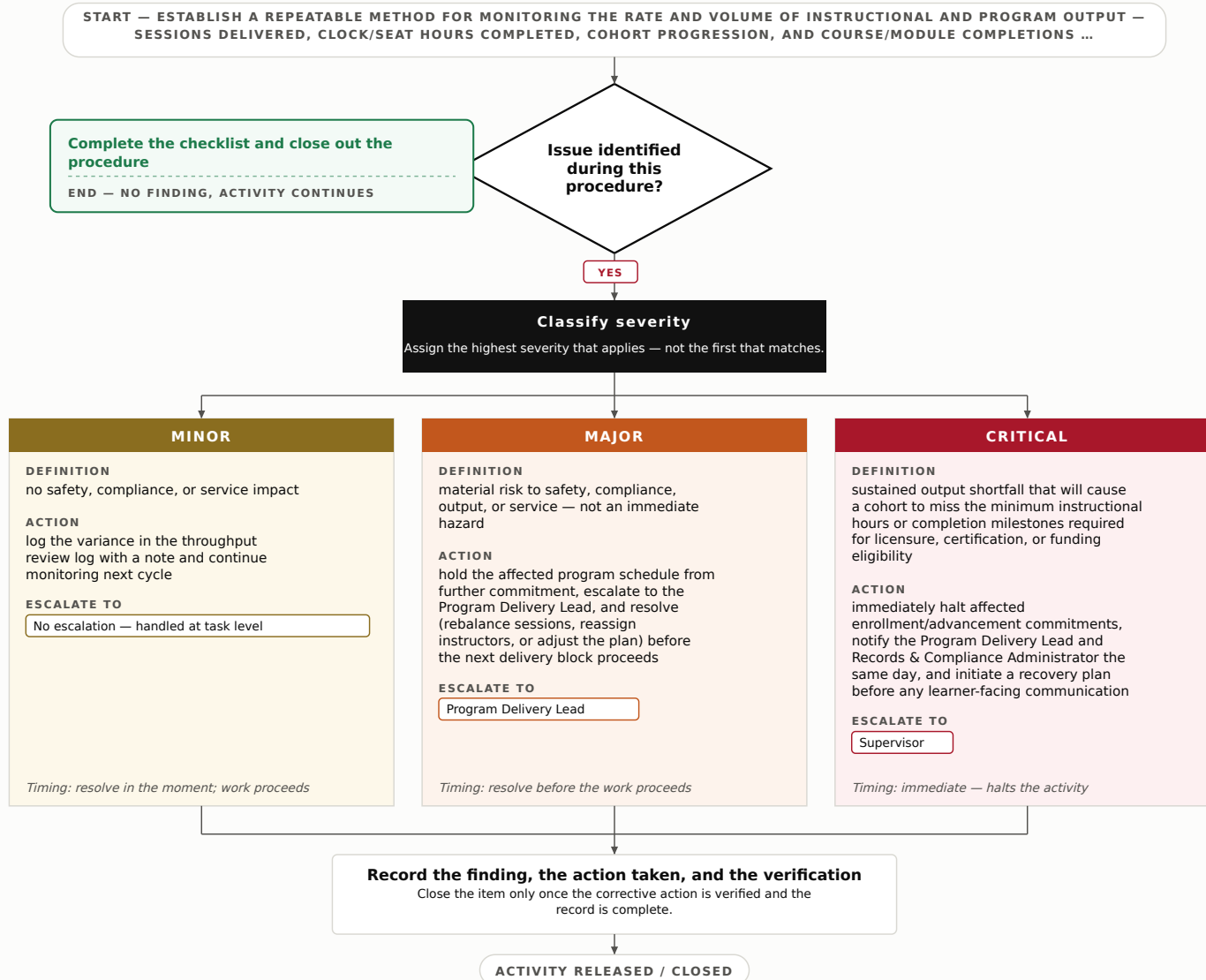


7. Step-by-Step Procedure

1. Retrieve the current published delivery plan (planned sessions, clock/seat hours, cohort milestones, and target completion volumes) for the review period.
2. Collect actual output data from the scheduling system, attendance/seat-hour logs, and learning-management or completion records for the same period.
3. Reconcile source data for completeness — confirm no missing session logs or unposted attendance before comparison; flag gaps to the Records & Compliance Administrator.
4. Calculate throughput variance: actual vs. planned instructional units, hours delivered, and cohort progression pace per program line.
5. Identify capacity constraints driving variance (instructor availability, room/lab/simulator or station availability, consumable or equipment shortfalls sourced from suppliers).
6. Classify each variance by severity using the Decision Tree and route accordingly.
7. Record findings, assigned corrective actions, owners, and due dates in the throughput review log.
8. Circulate the completed review to the Program Delivery Lead for sign-off and archive per the institution's records-retention schedule.

8. Decision Tree

Decision Tree — Output Monitoring & Throughput Review



READING THIS TREE

■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Source data reconciled complete before variance is calculated.
- Every variance classified and assigned an owner and due date.
- Compliance-relevant shortfalls (instructional hours, completions) confirmed against official records.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Current delivery plan retrieved and correct period confirmed		
Actual output data complete for all program lines		
Attendance/seat-hour records reconcile with logged output		
Throughput variance calculated per program line		
Capacity constraints identified and documented		
All variances classified by severity and routed		
Review signed off by Program Delivery Lead		

11. KPIs

- Throughput data reconciled and reviewed on schedule: $\geq 98\%$ of planned review cycles completed on time.
- Delivered instructional units/hours within $\pm 5\%$ of plan per program line.
- Major/Critical variances resolved within one delivery block of identification: 100%.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-015 — Bottleneck Identification & Response

Estimated completion time: 45-90 minutes per review cycle (excluding remediation lead time)

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure establishes how Operations detects constraints that slow the delivery of instruction and learner services — such as enrollment/registration queues, instructor or lab availability, credential-issuance backlogs, or unavailable training equipment — and how the operation responds so that program cohorts stay on plan.

2. Scope

Covers detection, classification, and first-response containment of throughput constraints across the instructional delivery chain at a facility- or field-based education/training provider. Excludes altering published class or session timetables, which is covered under OD-017 (schedule change), and reallocating seats, cohorts, or room/lab capacity, which is covered under OD-009 (capacity allocation).

3. Responsibilities

- Operations Coordinator — monitors throughput signals, runs the detection sweep, logs findings, and initiates first response.
- Program Delivery Lead — validates instructional/lab constraints, authorizes containment measures, and owns resolution for Major findings.
- Compliance Officer — confirms that any response preserves required instructor-to-learner ratios, contact hours, and licensing/accreditation obligations; sign-off authority on Critical findings.

4. Required PPE & Lockout/Tagout

- Standard facility PPE only; where the service line operates lab, shop, or vehicle-based training, use the PPE already mandated for that environment during any on-floor observation.
- Not applicable — no hazardous energy controlled by this procedure. LOTO on any training equipment identified as a constraint is performed under the equipment's own maintenance SOP, not here.

5. Regulatory References

- Family Educational Rights and Privacy Act, 20 U.S.C. §1232g / 34 CFR Part 99 — governs any learner-record data used in constraint analysis (applies to all members handling education records).
- Americans with Disabilities Act, 42 U.S.C. §12181 et seq. (Title III public accommodations) — response measures must not degrade required accommodations or access.

- State education/occupational-school licensing and accreditation standards applicable to the facility (e.g., state board approval, USDE-recognized accreditor requirements for contact hours and staffing ratios).
- Internal policy: Operations Throughput & Escalation Standard.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

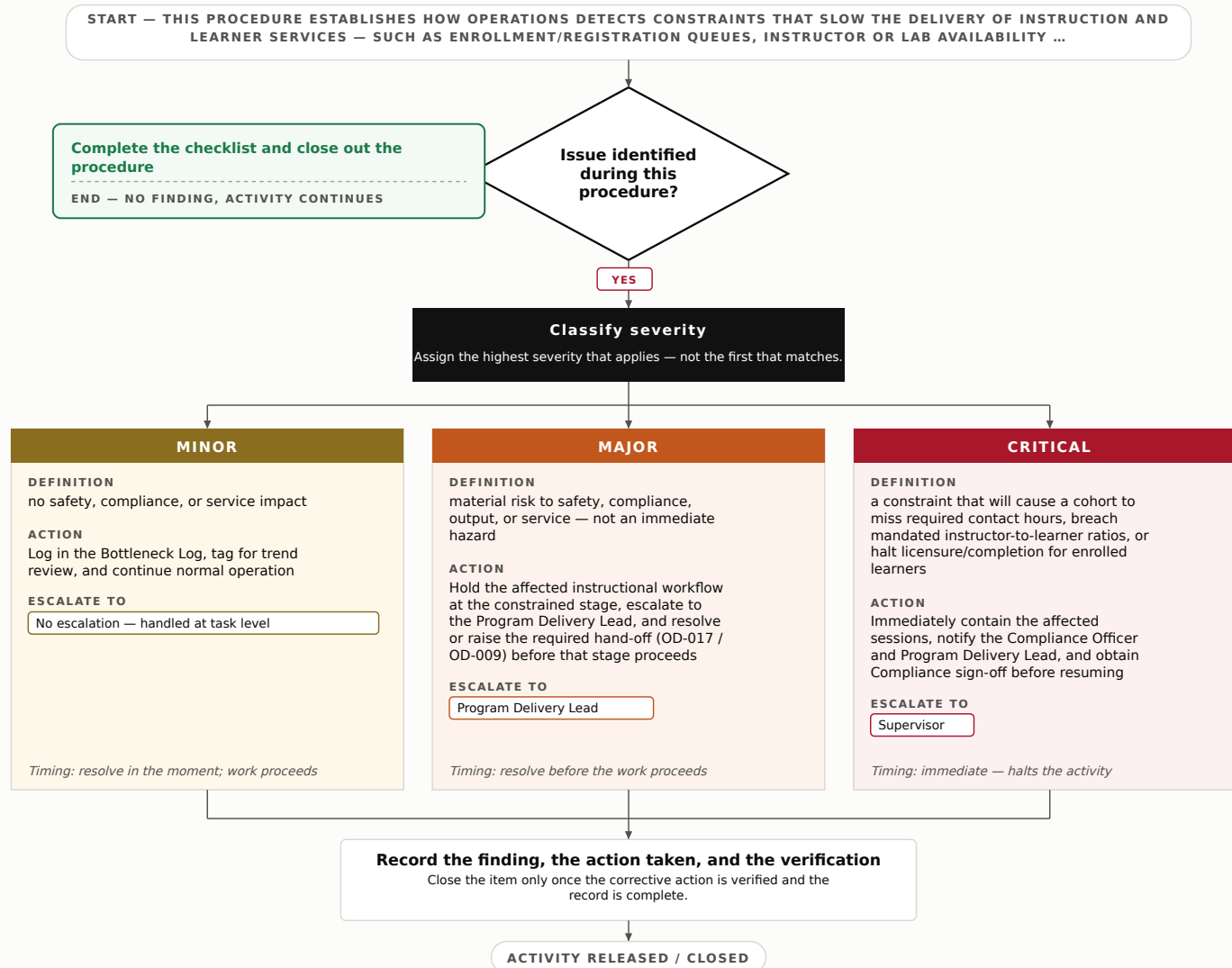
6. Process Flow



7. Step-by-Step Procedure

1. Pull current throughput signals: registration/enrollment queue depth, session start/stop punctuality, instructor and lab/room utilization, credential-issuance backlog, and open equipment tickets from 334310 audio/video training gear or lab stations.
2. Compare each signal against the operation's baseline thresholds (e.g., queue > X learners, utilization > 90%, backlog > agreed turnaround).
3. Identify the single binding constraint — the stage where demand most exceeds current throughput — rather than downstream symptoms.
4. Confirm the constraint is real, not a reporting artifact, by spot-checking source data or observing the affected stage directly.
5. Classify severity per Section 8 based on safety, compliance, output, and service impact.
6. Apply first-response containment appropriate to severity; where the remedy requires a timetable or seat/room change, raise the hand-off to OD-017 or OD-009 — do not execute it here.
7. Notify the responsible role named in Section 3 and record the agreed corrective action and owner.
8. Document the finding, classification, response, and hand-offs in the Bottleneck Log and close out the cycle.

8. Decision Tree

Decision Tree — Bottleneck Identification & Response**READING THIS TREE**

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Binding constraint correctly identified (not a downstream symptom) and verified against source data.
- Severity classification matches consequence-based definitions in Section 8.
- Any timetable or capacity remedy handed off to OD-017 / OD-009 rather than executed in this procedure.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Throughput signals pulled for all delivery stages		
Baselines/thresholds current and applied		
Binding constraint identified and verified		
Severity classified per Section 8		
Compliance ratios / contact-hour impact assessed		
Hand-offs to OD-017 / OD-009 raised where needed		
Bottleneck Log updated with owner and action		

11. KPIs

- Mean time from constraint detection to first response: ≤ 1 business day.
- Constraints resolved or handed off before affecting a scheduled session: $\geq 95\%$.
- Critical findings breaching contact-hour or ratio requirements: 0 per term.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-016 — Rework & Nonconforming Work Handling

Estimated completion time: 30-90 minutes per nonconforming item (excludes re-delivery scheduling)

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure defines how the Operations team identifies, isolates, and re-runs instructional or administrative work products (e.g., printed course materials, graded assessments, transcripts, certificates, scheduling records) that fail to meet the defined specification, so that learners receive only conforming deliverables and the institution preserves record integrity.

2. Scope

Covers segregation, holding, tracking, and re-running of nonconforming educational deliverables and administrative outputs produced within Operations across facility-based and field-based programs. Excludes formal disposition decisions (accept/reject/scrap/repair), which are covered under QC-014, and rework authorization sign-off, which is covered under QC-016.

3. Responsibilities

- Operations Coordinator — identifies nonconforming work, applies the hold, logs the item in the nonconformance register, and initiates re-run once authorized.
- Program/Operations Supervisor — reviews severity classification, escalates as needed, and confirms the re-run meets specification before release.
- Records & Compliance Officer — verifies that reissued records (transcripts, certificates, clock-hour/attendance logs) preserve version control and audit traceability.

4. Required PPE & Lockout/Tagout

- Standard facility PPE only; where the service line operates print/finishing equipment or cosmetology/trade/flight lab equipment, follow that equipment's local PPE rules during physical re-run.
- Not applicable — no hazardous energy involved in the handling and re-run of educational deliverables. (Any equipment servicing is out of scope and handled under its own maintenance SOP.)

5. Regulatory References

- FERPA (20 U.S.C. §1232g; 34 CFR Part 99) — protection and accurate maintenance of education records during segregation, correction, and reissue.

- 34 CFR Part 668 (Student Assistance General Provisions) — administrative-capability and record-integrity requirements applicable to institutions participating in Title IV programs.
- Applicable institutional/programmatic accreditor standards and the applicable state licensing/education authority requirements governing accuracy of issued credentials and clock-hour/credit records.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

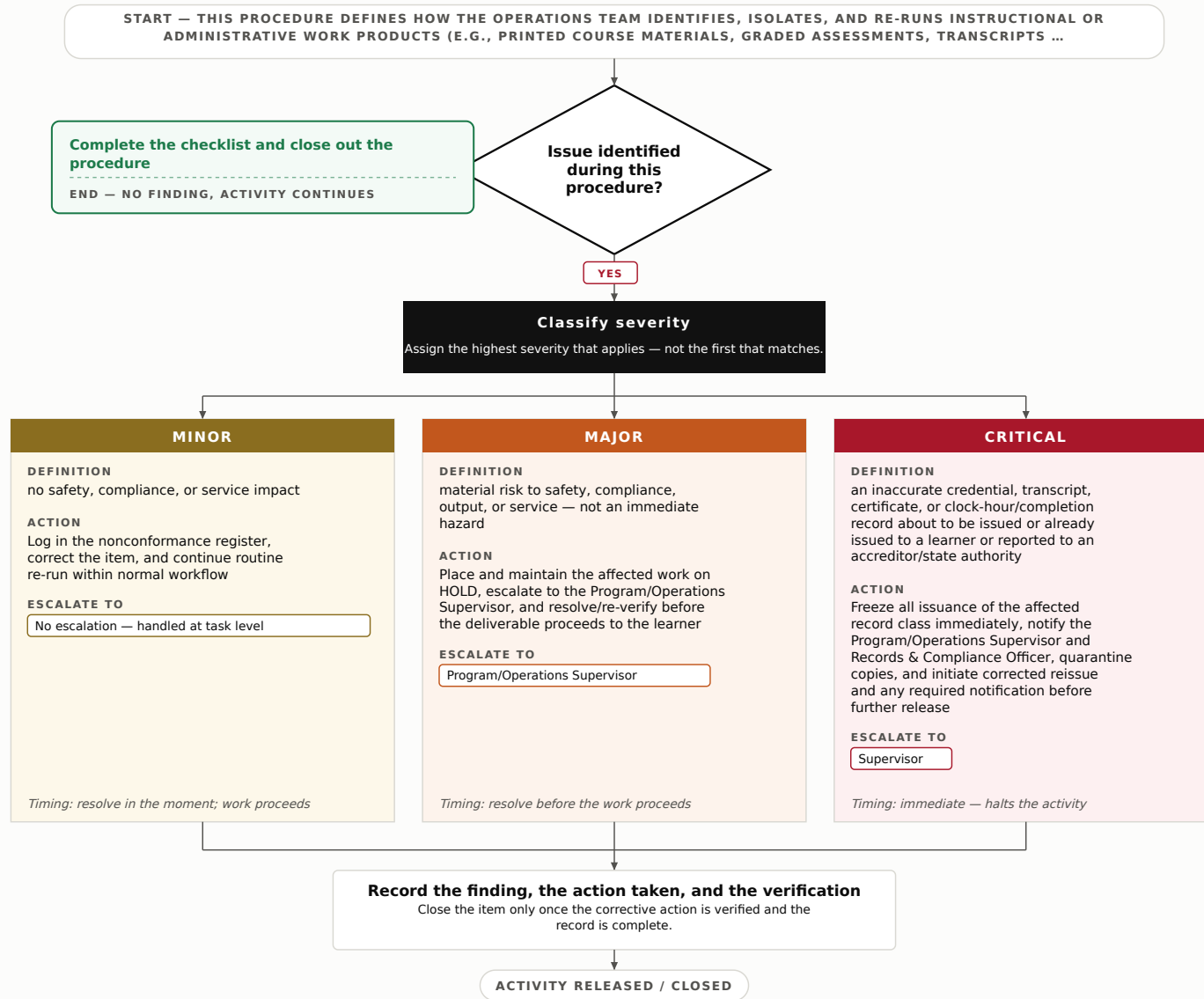
6. Process Flow



7. Step-by-Step Procedure

1. On detecting work that fails the defined specification, stop distribution of the affected item and any linked batch immediately.
2. Physically or digitally segregate the item: move printed materials to a labeled HOLD area; for records/files, apply a "HOLD — DO NOT ISSUE" status flag and restrict access in the system of record.
3. Attach a nonconformance tag/label capturing item ID, learner/cohort or course affected, defect description, date, and identifier of the person who found it.
4. Log the item in the nonconformance register and assign a severity classification per Section 8.
5. Route the item for formal disposition per QC-014 and obtain rework authorization per QC-016 before any re-run begins.
6. Once authorized, re-run the work to the current approved specification (reprint, re-grade, regenerate the record, or reschedule the deliverable), using the correct version/template.
7. Verify the re-run against the original specification; confirm the superseded version is retired from circulation and version control is intact.
8. Record final outcome, re-run date, verifier, and release approval in the nonconformance register; retain per the institution's records-retention schedule.

8. Decision Tree

Decision Tree — Rework & Nonconforming Work Handling**READING THIS TREE**■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every nonconforming item is tagged and segregated before any further processing.
- Nonconformance register entry created with severity and traceable item ID.
- Re-run verified against current approved specification and superseded version retired.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Nonconforming item halted and removed from distribution		
Item segregated to HOLD area / status flag applied		
Nonconformance tag complete (ID, defect, date, finder)		
Register entry logged with severity classification		
Disposition/authorization confirmed (QC-014 / QC-016)		
Re-run matches current approved specification		
Superseded version retired; version control intact		

11. KPIs

- Nonconforming items segregated and tagged within 1 business day of detection: $\geq 98\%$.
- Re-run accuracy (conforming on first re-verification): $\geq 95\%$.
- Unresolved Critical nonconformances at period close: 0.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-017 — Schedule Deviation & Change Management

Estimated completion time: 30-90 minutes per deviation event

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To provide a controlled method for handling changes, delays, and priority shifts to the instructional calendar, cohort schedules, and delivery commitments so that contracted or published instructional hours, sequence dependencies, and learner obligations are preserved. This protects both the institution's compliance posture and the learner experience.

2. Scope

Covers intake, assessment, approval, and documentation of any deviation to a scheduled instructional session, program milestone, resource booking, or delivery date across in-person, field-based, and online modalities. Excludes bottleneck/capacity response, which is covered under OD-015, and learner/customer notification, which is covered under OD-022.

3. Responsibilities

- Operations Coordinator — logs the deviation, assembles impact data, and drafts the change record.
- Program Delivery Lead — assesses instructional-hour and sequence impact, holds affected sessions, and approves or rejects changes within delegated authority.
- Compliance/Accreditation Liaison — verifies that any change preserves required contact hours, program length, and accreditation/licensing commitments before release.

4. Required PPE & Lockout/Tagout

- Standard facility PPE only; where the service line operates equipment or vehicles (e.g., cosmetology stations, flight/simulator training), follow that line's existing PPE rules — none added by this task.
- Not applicable — no hazardous energy involved. Deviation control is administrative.

5. Regulatory References

- Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. §1232g / 34 CFR Part 99 — governs schedule/enrollment records tied to identifiable learners.
- 34 CFR Part 668 (Student Assistance General Provisions) — where the institution participates in Title IV, changes affecting program length, contact hours, or enrollment status carry reporting obligations.

- Applicable state education/licensing agency and accreditor requirements on minimum instructional hours, program length, and calendar changes (e.g., state proprietary-school board, ACCSC/COE, or equivalent).
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

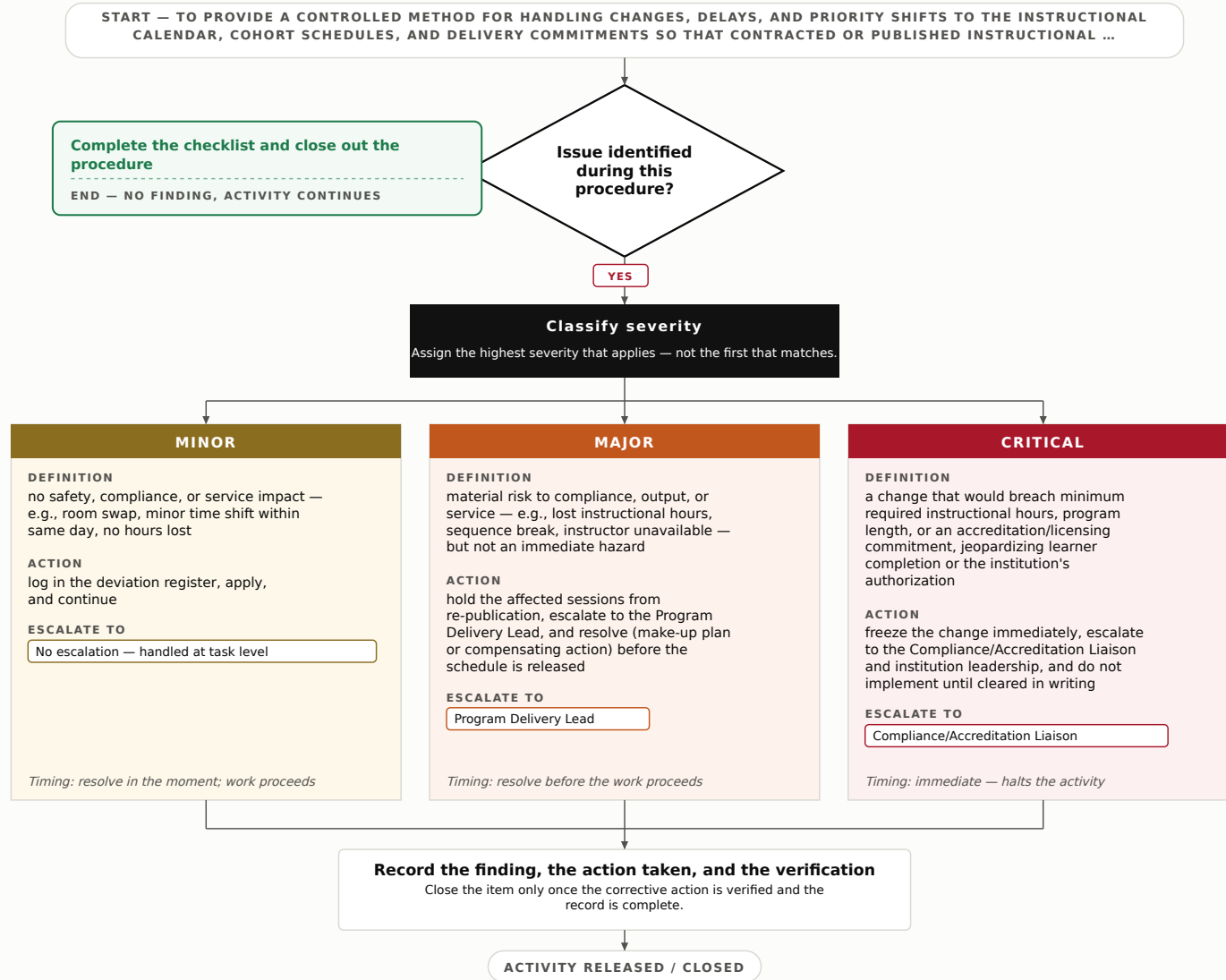


7. Step-by-Step Procedure

1. Capture the deviation: record requested change, source, affected cohort/session, date, and reason on the change intake form.
2. Confirm the baseline: pull the current published schedule, contracted instructional-hour totals, and any dependent sessions or milestones.
3. Assess impact: calculate net effect on contact hours, program end date, resource/room/instructor bookings, and prerequisite sequence.
4. Verify compliance floor with the Compliance/Accreditation Liaison — confirm no breach of minimum-hour, program-length, or accreditation commitments.
5. Classify severity per Section 8 and route accordingly.
6. Decide: Program Delivery Lead approves, rejects, or requests a compensating action (make-up session, alternate instructor, modality shift).
7. Update the master schedule and log the approved change; flag the record for learner notification under OD-022.
8. Document the full change record — request, assessment, decision, approver, and timestamp — in the deviation log; retain per records policy.

8. Decision Tree

Decision Tree — Schedule Deviation & Change Management



READING THIS TREE

No finding

Activity stands. Complete the checklist and continue.

Minor

Handled in place at task level; no escalation.

Major

Supervisory decision required before the next stage.

Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Baseline instructional-hour total confirmed before and after the change.
- All dependent sessions and prerequisites re-verified for sequence integrity.
- Compliance floor sign-off obtained for any Major or Critical change.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Deviation intake form complete and dated		
Baseline schedule and contracted hours attached		
Contact-hour impact calculated		
Sequence/prerequisite dependencies checked		
Compliance/Accreditation sign-off (Major/Critical)		
Master schedule updated with approver logged		
Record flagged for OD-022 notification		

11. KPIs

- Deviations logged with complete records: $\geq 98\%$.
- Median time from deviation intake to decision: ≤ 24 business hours.
- Instructional-hour/accreditation breaches resulting from uncontrolled changes: 0.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-018 — Subcontractor & Vendor Coordination

Estimated completion time: 45-90 minutes per engagement setup; 15-20 minutes per periodic coordination review

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure governs how the institution selects, onboards, and coordinates external providers who perform part of an instructional or operational deliverable — including exam proctoring services, curriculum or courseware vendors, instructional-media producers, print/reproduction houses, catering, and transportation providers — so that outsourced work meets contractual, quality, and data-protection standards.

2. Scope

Covers vendor/subcontractor qualification, engagement setup, scope-of-work confirmation, coordination of scheduling and deliverables, and performance monitoring for external providers supporting Operations. Excludes contractor maintenance supervision, which is covered under MD-018, and contractor safety, which is covered under SD-023.

3. Responsibilities

- Operations Coordinator — issues scope of work, confirms vendor documentation, schedules deliverables, and logs coordination records.
- Procurement/Contracts Lead — verifies contract terms, insurance, and licensing; approves vendor onboarding before work begins.
- Operations Manager — owns escalation, approves scope changes, and signs off on vendor performance reviews.

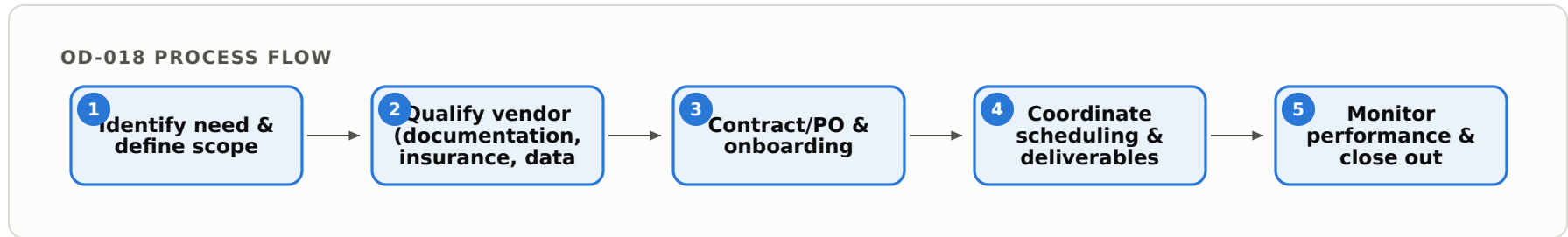
4. Required PPE & Lockout/Tagout

- Standard facility PPE only; site-visiting vendors follow visitor and access protocols. No task-specific PPE required for coordination activity.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- FERPA (20 U.S.C. § 1232g; 34 CFR Part 99) — governs disclosure of education records to third-party providers (school-official/contractor exception requires direct control over use and re-disclosure).
- FTC Safeguards Rule (16 CFR Part 314) — where the institution handles covered financial information, requires oversight of service providers by contract and monitoring.
- Applicable state procurement, public-contracting, and vendor-registration rules for the institution's jurisdiction (e.g., state education agency vendor requirements).
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

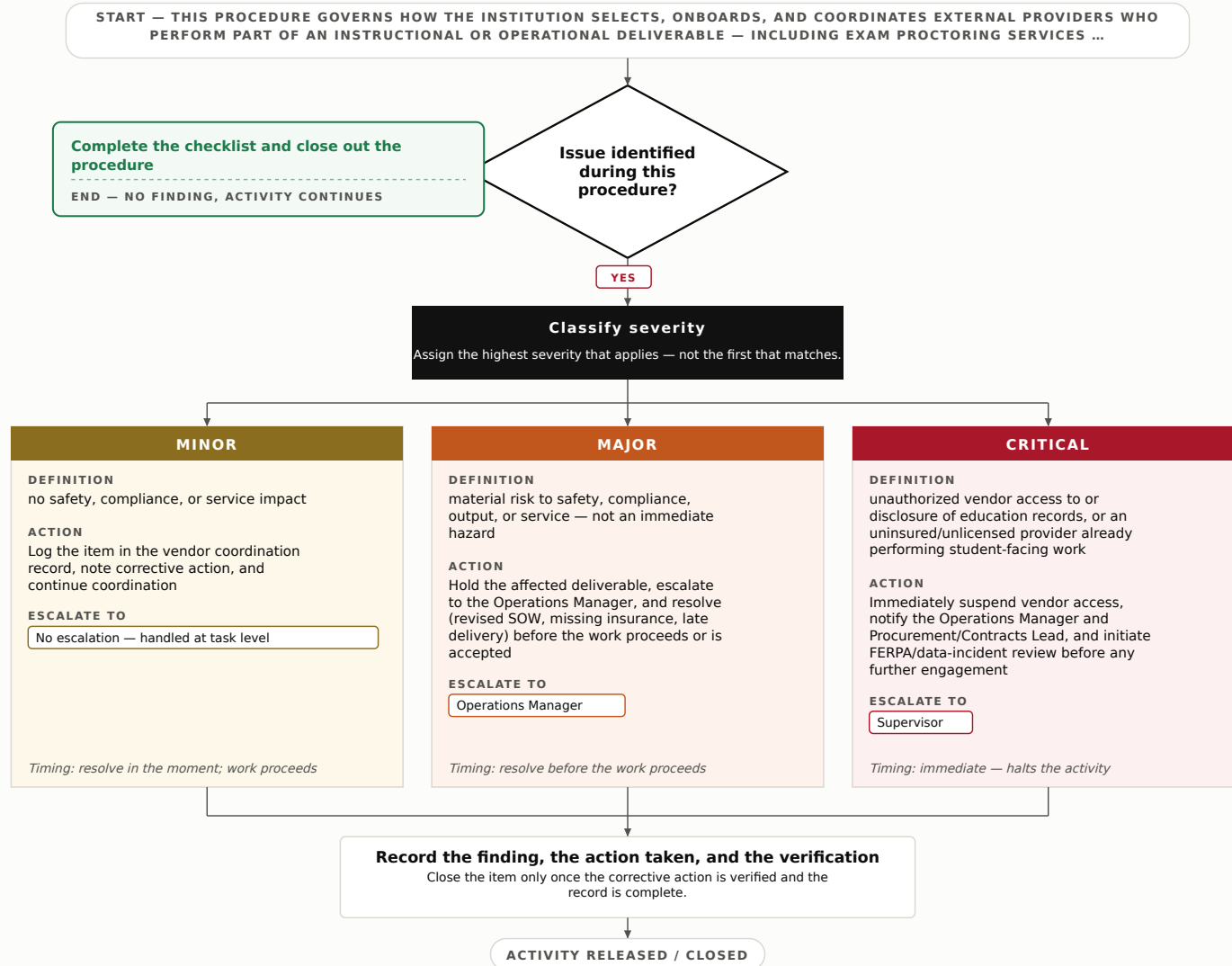


7. Step-by-Step Procedure

1. Define the outsourced deliverable in writing: what the vendor performs, acceptance criteria, timeline, and the point where their work integrates into the institution's instructional or operational output.
2. Confirm the vendor holds required credentials, business licensing, and insurance/indemnification appropriate to the service line; verify with the Procurement/Contracts Lead.
3. Where the engagement involves access to education records, execute a FERPA-compliant data-handling addendum defining the contractor as a "school official" with restricted use and no re-disclosure.
4. Verify supply-linked deliverables against source suppliers where applicable — e.g., print/reproduction vendors (323111), instructional audio/video producers (334310), and office-supply fulfillment (339940) — confirming specifications and delivery dates.
5. Execute the contract or purchase order; complete vendor onboarding (contacts, access provisioning, escalation path) before any work is authorized.
6. Coordinate scheduling and hand-off points; confirm the vendor acknowledges scope, milestones, and acceptance criteria in writing.
7. Monitor delivery against acceptance criteria; conduct interim check-ins and document any deviations, change orders, or corrective requests.
8. On completion, verify deliverables, close the engagement, and file all coordination records (SOW, addenda, correspondence, acceptance sign-off) in the vendor file.

8. Decision Tree

Decision Tree — Subcontractor & Vendor Coordination



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Written scope of work with acceptance criteria exists and is acknowledged by the vendor before work starts.
- Insurance, licensing, and FERPA/data-handling documentation verified and on file prior to authorization.
- Deliverables checked against acceptance criteria at each hand-off point.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Written SOW with acceptance criteria on file		
Vendor licensing and business registration verified		
Insurance/indemnification current and adequate		
FERPA / data-handling addendum executed where records accessed		
Contract or PO signed and onboarding complete		
Delivery schedule and hand-off points confirmed in writing		
Deliverables accepted and coordination records filed		

11. KPIs

- Vendors with complete documentation (SOW, insurance, data terms) before work start $\geq 99\%$
- On-time deliverable acceptance rate $\geq 95\%$
- Data-handling/compliance incidents involving external providers = 0

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-019 — Interdepartmental Coordination Review

Estimated completion time: 60-90 minutes per coordination cycle

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure aligns Operations with the other departments touching the same instructional and support work — Academic/Instruction, Admissions/Enrollment, Facilities, and Finance/Records — so that course schedules, classroom and lab resources, instructor assignments, and student-service commitments are synchronized before delivery. It prevents double-booking, resource gaps, and conflicting messages to enrolled learners across any teaching-institution model.

2. Scope

Covers the recurring Operations-led coordination review that reconciles cross-departmental dependencies for scheduled instructional programs and services at an educational services facility or program site. Self-contained within OD (cross-department coordination overview); it does not author the individual department procedures it references, and any hand-off is acknowledged by module ID only.

3. Responsibilities

- Operations Coordinator — convenes the review, maintains the shared dependency log, and confirms resolution of each open item before close.
- Department Liaisons (one per touching department: Instruction, Admissions/Enrollment, Facilities, Finance/Records) — bring current commitments, flag conflicts, and confirm their department's readiness.
- Operations Manager — approves the reconciled plan, arbitrates unresolved conflicts, and signs off on release to delivery.

4. Required PPE & Lockout/Tagout

- Standard facility PPE only; this is an administrative coordination task with no physical exposure.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. §1232g / 34 CFR Part 99 — governs sharing of personally identifiable student-record information across departments during coordination.
- Americans with Disabilities Act (ADA), 42 U.S.C. §12181 et seq. / Section 504 of the Rehabilitation Act — accessibility of scheduled instruction, facilities, and accommodations must be reflected in coordination decisions.
- Applicable state/accreditor recordkeeping and program-integrity requirements for the institution's authorization (e.g., state licensing board or recognized accrediting body conditions on scheduling, enrollment, and reporting).

- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

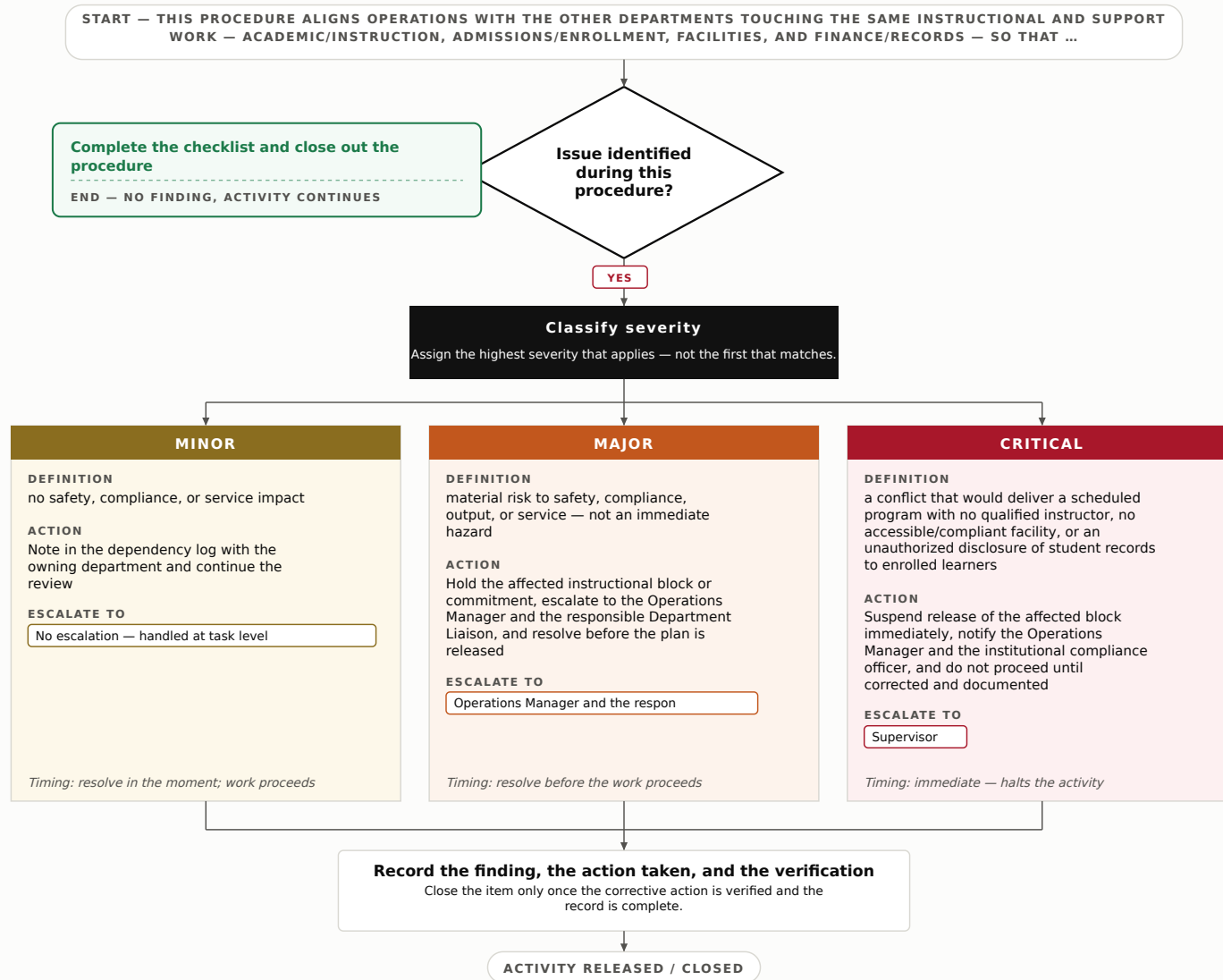
6. Process Flow



7. Step-by-Step Procedure

1. Operations Coordinator issues the coordination agenda and requests current commitments from each Department Liaison (scheduled sessions, instructor assignments, room/lab bookings, enrollment counts, accommodation needs, budget or billing holds).
2. Consolidate all inputs into the shared dependency log, mapping each instructional block to its required resources and the department accountable for each.
3. Reconcile overlaps: identify double-booked rooms/labs, instructor conflicts, enrollment-vs-capacity mismatches, and accommodation gaps.
4. Verify that any student-record data exchanged during reconciliation is limited to what each department needs and handled per FERPA.
5. Classify each open conflict by severity (see Section 8) and route for resolution.
6. Confirm accessibility and accommodation commitments (ADA/Section 504) are assigned to a named department before proceeding.
7. Operations Manager reviews the reconciled plan, resolves remaining conflicts, and approves release to delivery.
8. Distribute the unified plan to all liaisons and record the review outcome, decisions, and sign-offs in the coordination log.

8. Decision Tree

Decision Tree — Interdepartmental Coordination Review**READING THIS TREE**■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every scheduled instructional block maps to a confirmed room/lab, instructor, and enrollment count with a named accountable department.
- All accommodation (ADA/Section 504) commitments are assigned and confirmed.
- Any cross-department student-record exchange is FERPA-compliant and limited to need.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
All touching departments submitted current commitments		
Dependency log reconciled — no unassigned instructional block		
Room/lab double-bookings resolved		
Instructor assignments confirmed, no conflicts		
Enrollment counts within confirmed capacity		
Accommodation/accessibility commitments assigned		
Student-record exchanges verified FERPA-compliant		

11. KPIs

- Cross-department conflicts resolved before release: $\geq 98\%$
- Coordination reviews completed on schedule (per cycle cadence): 100%
- Unauthorized student-record disclosures during coordination: 0

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

Phase 4 — Completion & customer handoff

OD-020 — Job / Order Completion Verification

Estimated completion time: 20–45 minutes per completed job/order

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To confirm that a completed instructional deliverable, training cohort, or enrollment/records order meets its defined specification — required contact hours, competency outcomes, and documentation — before it is handed off for release to the learner, sponsor, or downstream channel.

2. Scope

Covers verification that all completion criteria for a scheduled program, course section, cohort, or records/materials order have been met and reconciled against the work order or program specification. Excludes final inspection (spec-conformance testing), covered under QC-012, and formal release/turnover, covered under QC-013.

3. Responsibilities

- Operations Coordinator — assembles the completed job/order file and runs the initial verification against the program specification and work order.
- Program/Instructional Lead — confirms delivered contact hours, competency outcomes, and instructor sign-offs are complete and accurate.
- Compliance Officer — verifies records, credentialing, and retention requirements are satisfied before hand-off to QC-013.

4. Required PPE & Lockout/Tagout

- Standard facility PPE; none specific to this administrative verification task.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- FERPA, 20 U.S.C. §1232g / 34 CFR Part 99 (protection of student education records — applies to all members).
- Internal Program Completion & Records Policy (governing basis where no sector-wide statute applies).
- Applicable state licensing/accreditation completion and recordkeeping requirements (e.g., state education agency or program-specific board rules for hour/competency documentation).
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

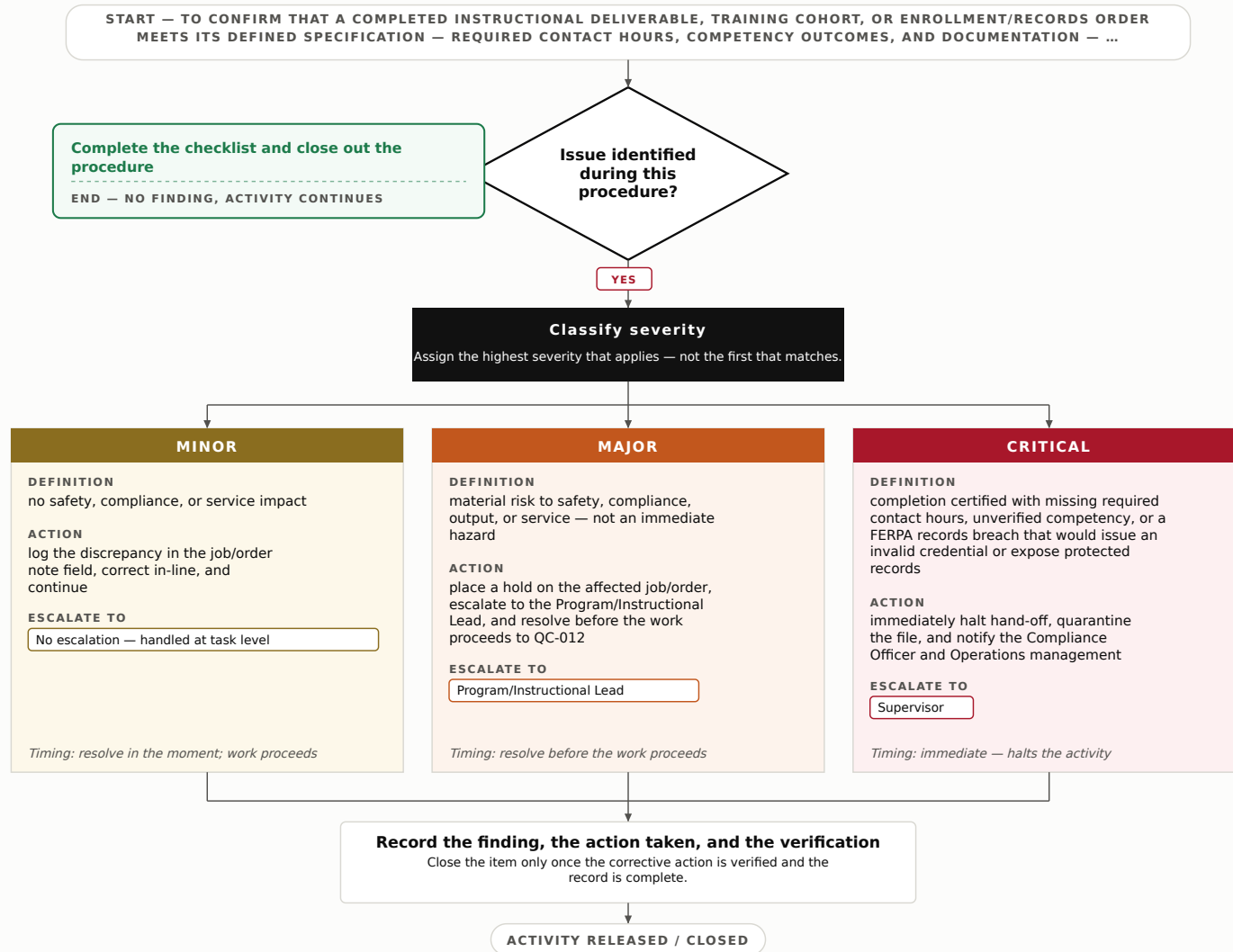


7. Step-by-Step Procedure

1. Retrieve the work order or program specification and the completed job/order file for the cohort, section, or records order.
2. Verify delivered instructional contact hours and session records match the specified minimum required for completion.
3. Confirm all competency assessments, practical evaluations, or examinations are recorded with instructor sign-off.
4. Reconcile all deliverables against the work order — printed certificates or course materials (from 323111 Commercial Printing), issued office/instructional supplies (339940), and any A/V equipment (334310) returned or accounted for.
5. Confirm learner records are complete, accurate, and stored in compliance with FERPA and applicable retention rules.
6. Check that any downstream fulfillment items are packaged and staged for the distribution channel (423420 Office Equipment Wholesalers) where applicable.
7. Resolve any discrepancy per the Decision Tree before marking the job/order verified.
8. Record the verification outcome, timestamp, and verifier initials in the job/order log, then route to QC-012 for final inspection.

8. Decision Tree

Decision Tree — Job / Order Completion Verification



READING THIS TREE

No finding

Activity stands. Complete the checklist and continue.

Minor

Handled in place at task level; no escalation.

Major

Supervisory decision required before the next stage.

Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Contact hours and competency outcomes match the program specification.
- All instructor and evaluator sign-offs present and legible.
- Learner records complete and FERPA-compliant.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Delivered contact hours meet specified minimum		
Competency/exam outcomes recorded and signed		
Deliverables reconciled against work order		
Learner records complete and FERPA-compliant		
Printed certificates/materials accurate and accounted for		
Fulfillment items staged for distribution (if applicable)		
Verification logged with timestamp and initials		

11. KPIs

- Completion verification accuracy (no rework after QC-012): $\geq 98\%$
- Jobs/orders verified within 1 business day of completion: $\geq 95\%$
- Critical findings reaching hand-off: 0

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-021 — Delivery / Service Turnover

Estimated completion time: 20-45 minutes per learner or cohort turnover

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure governs the formal release of a completed instructional program, course, certification, or training service to the learner or the next responsible party (e.g., a sponsoring employer, licensing board, or credential-issuing office). It ensures completion is verified, records are accurate, and required documents are issued at the point of turnover.

2. Scope

Covers the release of finished educational services — completion confirmation, credential/certificate issuance, and handoff of learner records or deliverables to the learner or next party. Excludes physical dispatch or shipping of materials, which lives in SH-014, and proof-of-delivery capture, which lives in SH-024.

3. Responsibilities

- Program/Operations Coordinator — verifies completion criteria, assembles the turnover packet, and initiates release.
- Registrar / Records Officer — confirms transcript, hours, and credential accuracy against official records before issuance.
- Supervising Licensed Professional (or program director) — authorizes release where a regulated credential, clock-hour attestation, or licensing-board submission is involved.

4. Required PPE & Lockout/Tagout

- Standard facility PPE; none specific to this administrative task.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. § 1232g / 34 CFR Part 99 — governs release and disclosure of education records across institutions receiving applicable funding; internal privacy policy applies to any provider outside FERPA coverage.
- Applicable state education agency / licensing board rules on completion documentation, transcripts, and clock-hour attestation (e.g., cosmetology, flight, or trade-school hour records where applicable).
- Internal Records & Release Policy — governs credential accuracy and authorization for all members not otherwise covered.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

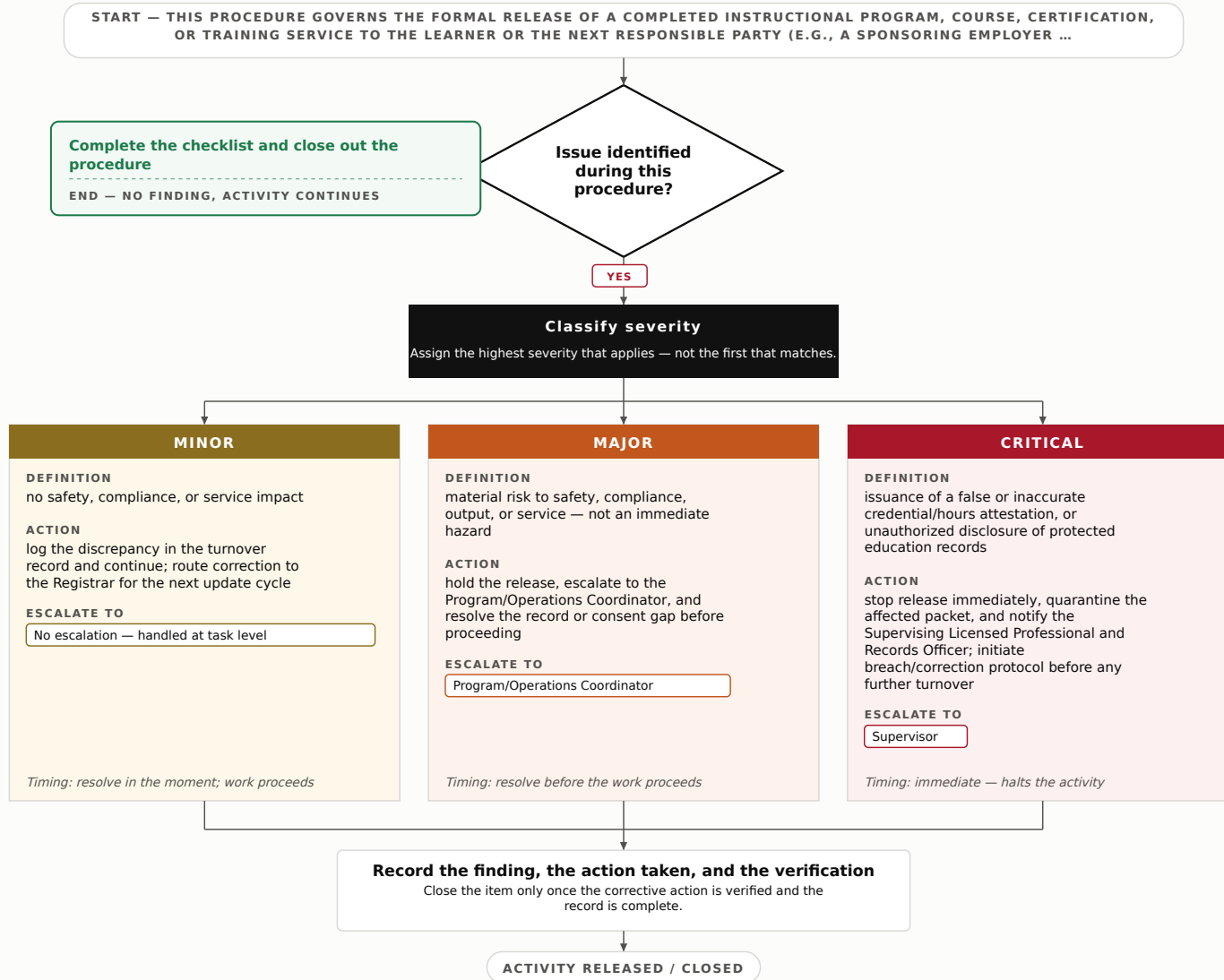


7. Step-by-Step Procedure

1. Confirm the learner or cohort has met all completion criteria (attendance/clock hours, assessments, competencies, financial hold clearance).
2. Reconcile records with the Registrar: verify transcript, hours logged, and credential type match official completion data.
3. Verify identity of the receiving party and confirm authorized release consent under FERPA or internal privacy policy (including any third-party/sponsor release authorization).
4. Assemble the turnover packet: certificate/credential, transcript or hours statement, and any board-submission or continuing-education documentation.
5. Obtain authorization from the Supervising Licensed Professional or program director where a regulated credential or board submission is involved.
6. Release the packet to the learner or next party; coordinate any downstream distribution handoff with 423420 Office Equipment Wholesalers only if physical media are involved (dispatch remains under SH-014).
7. Confirm receipt acknowledgment is captured per SH-024 (do not author here).
8. Record the turnover: log date, recipient, documents released, and authorizer in the records system.

8. Decision Tree

Decision Tree — Delivery / Service Turnover



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Completion criteria fully met and documented before packet assembly.
- Transcript/hours reconciled and signed off by the Registrar.
- Release authorization and privacy consent verified on file.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Completion criteria verified (hours/assessments/competencies)		
Records reconciled with official transcript		
Recipient identity and release consent confirmed		
Credential/certificate accurate and authorized		
Turnover packet complete		
Board/CE documentation included where required		
Turnover logged with recipient and authorizer		

11. KPIs

- Turnover accuracy (records/credentials error-free): $\geq 99\%$
- On-time release within committed turnaround: $\geq 95\%$
- FERPA/privacy consent verified before release: 100%

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-022 — Customer Communication & Status Notification

Estimated completion time: 15-45 minutes per notification cycle; ongoing across the enrollment/program lifecycle

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To keep enrolled students, applicants, and authorized parties reliably informed of the status of their enrollment, program, or service request — including schedule changes, progress milestones, holds, and completion — so that expectations are managed and no student is left uninformed of a material change.

2. Scope

Covers outbound status notifications and routine two-way communication regarding enrollment, course/cohort scheduling, program progress, holds, and completion across all delivery lines (classroom, lab/shop, online, and field/practical training). Excludes complaint intake, which is covered under OD-023, and quality-complaint investigation, which is covered under QC-021.

3. Responsibilities

- Student Services Coordinator (Operations) — drafts, sends, and logs status notifications; maintains the contact-of-record and consent status for each student.
- Program/Operations Supervisor — approves communications involving material changes (schedule, completion status, holds) and authorizes escalations.
- Records & Compliance Officer — verifies that recipient identity, authorized-party status, and consent are valid before any record-bearing notification is released.

4. Required PPE & Lockout/Tagout

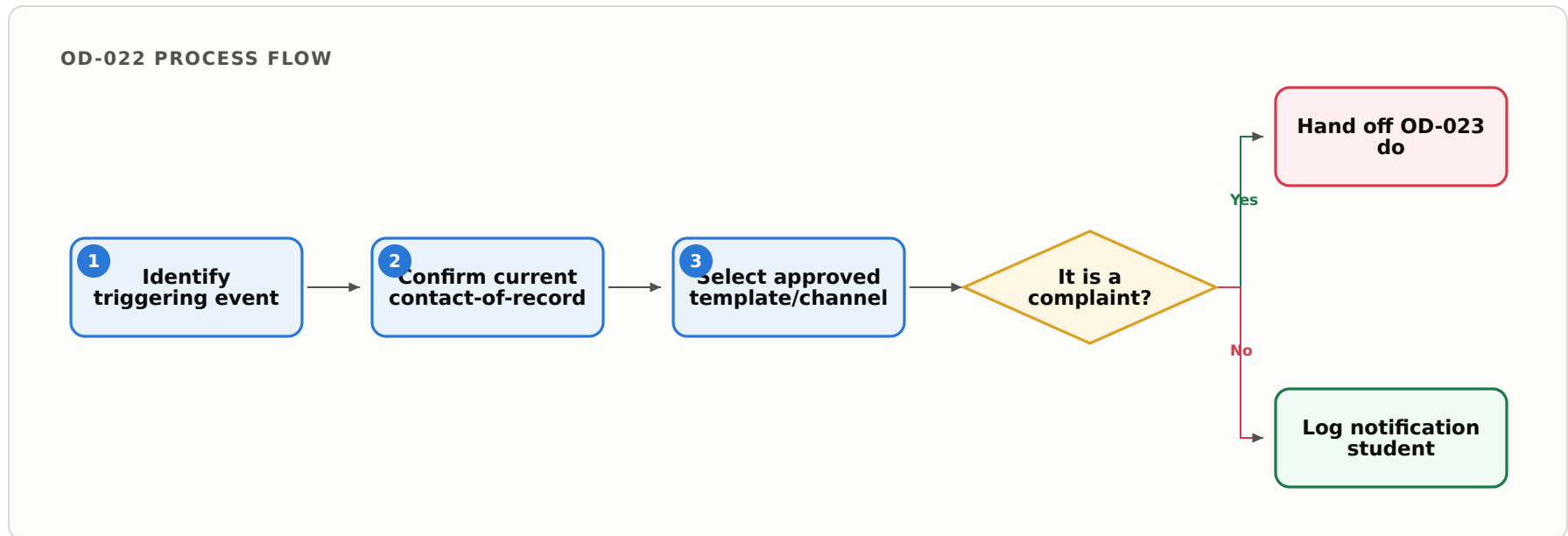
- Standard facility PPE; none specific to this administrative task.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. §1232g / 34 CFR Part 99 — governs disclosure of student education records to students and authorized parties (applies to all institutions receiving covered funding; treat as baseline where not funded).
- FTC "Telemarketing" / TCPA (47 U.S.C. §227) constraints on automated calls/texts where SMS or auto-dialed notifications are used.
- CAN-SPAM Act (15 U.S.C. §7701 et seq.) for commercial email notification content and opt-out handling.

- State consumer-disclosure and truth-in-enrollment rules applicable to educational providers; and where the provider participates in federal student aid, 34 CFR Part 668 consumer-information provisions (e.g., Title IV institutions).
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow



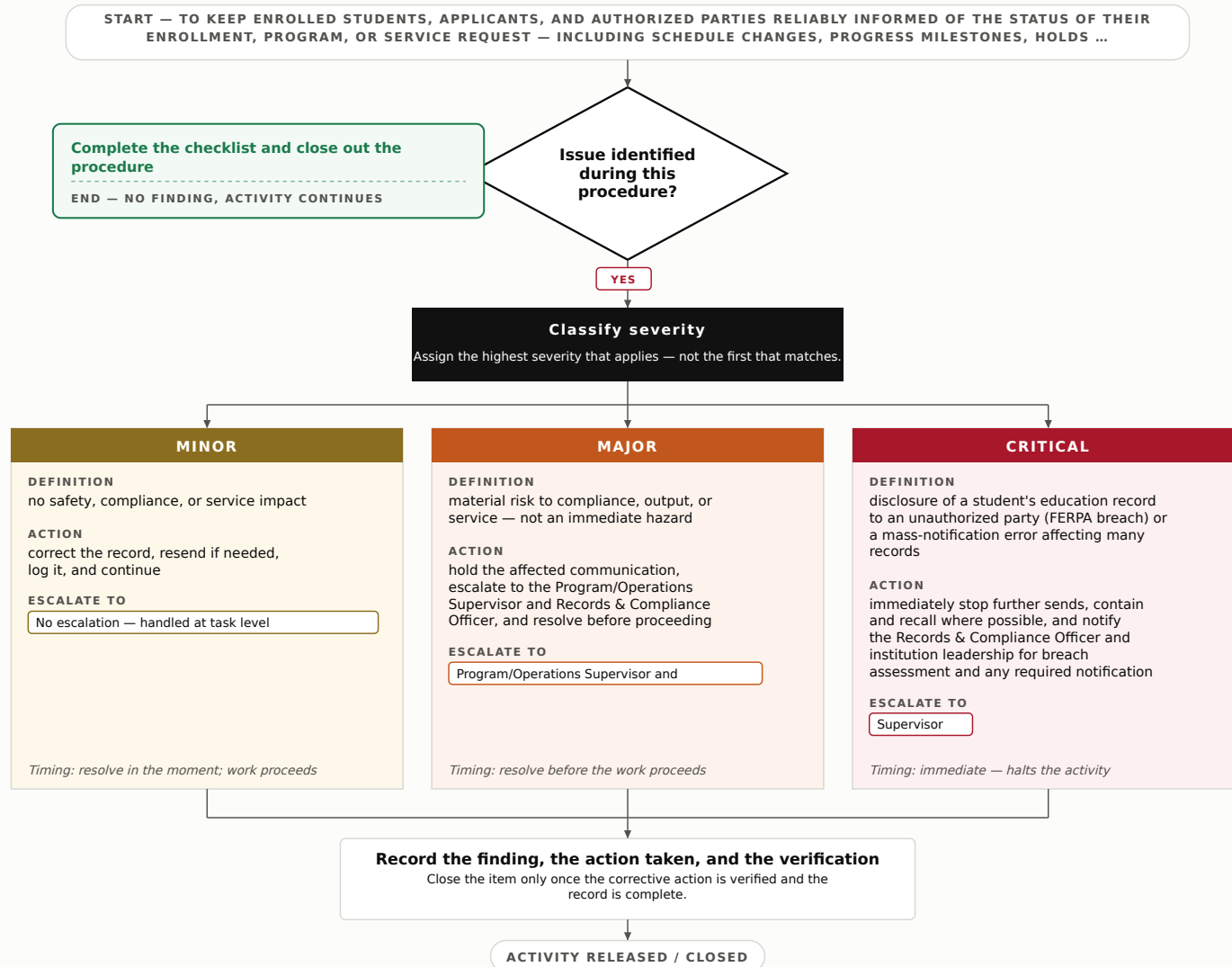
7. Step-by-Step Procedure

1. Identify the triggering event (enrollment confirmed, schedule/cohort change, progress milestone, hold placed/released, program completion, or service-request update) and locate the affected student record.
2. Confirm the current contact-of-record and communication-consent status (email/SMS/phone), and confirm the recipient is the student or a FERPA-authorized party before including any record detail.
3. Select the approved template/channel for the event type and populate it with accurate, current status information; avoid disclosing another student's data.
4. For material changes (schedule shifts, holds, completion status), route the draft to the Program/Operations Supervisor for approval before release.
5. Send the notification through the approved channel; for automated SMS/email, confirm opt-out language and consent are in place.
6. Confirm delivery/receipt where feasible (read receipt, portal acknowledgment, or callback), and note undeliverable contacts for follow-up.
7. Handle any inbound reply that is a routine status question directly; if it is a complaint, hand off to OD-023 and do not process it here.

8. Log the notification in the student communication record: date/time, channel, recipient, event type, content summary, approval (if any), and delivery confirmation.

8. Decision Tree

Decision Tree — Customer Communication & Status Notification



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Recipient identity and authorized-party/consent status verified before any record-bearing notification.
- Status content matches the current record and, for material changes, carries supervisor approval.
- Correct channel used with valid opt-out/consent handling for automated messages.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Contact-of-record and consent verified current		
Recipient confirmed as student or FERPA-authorized party		
Notification content matches current student record		
Supervisor approval obtained for material change		
Approved template/channel used; opt-out present (auto messages)		
Delivery/receipt confirmed or undeliverable flagged		
Notification logged in communication record		

11. KPIs

- On-time notification of material status changes: $\geq 98\%$ sent within 1 business day of the event.
- Recipient-verification compliance: 100% of record-bearing notifications with verified identity/consent.
- Delivery confirmation rate: $\geq 95\%$ of sent notifications confirmed or escalated for follow-up.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-023 — Customer Feedback & Complaint Intake

Estimated completion time: 15-30 minutes per intake record

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To provide a consistent method for capturing, logging, acknowledging, and routing feedback and complaints from students, parents/guardians, apprentices, sponsors, and other customers so that each item reaches the correct owner promptly and a defensible record is maintained.

2. Scope

Covers the receipt, documentation, classification, acknowledgment, and routing of all customer feedback and complaints across every intake channel (walk-in, phone, email, web form, learning-management portal, and written correspondence) at an Educational Services operation. Excludes root-cause investigation of quality complaints (QC-021) and any corrective action (QC-019), which are authored in those modules.

3. Responsibilities

- Intake Coordinator (Front Office / Student Services) — receives and logs each item, assigns a tracking number, and issues acknowledgment.
- Operations Supervisor — reviews the log daily, classifies severity, and routes items to the responsible program or department owner.
- Records & Compliance Officer — maintains the complaint register, safeguards privacy of personally identifiable information, and verifies retention.

4. Required PPE & Lockout/Tagout

- Standard facility PPE; none specific to this administrative task.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- FTC Act §5 (16 CFR) — prohibition on unfair or deceptive acts, including handling of consumer/student complaints.
- Family Educational Rights and Privacy Act (FERPA, 20 U.S.C. §1232g; 34 CFR Part 99) — protection of personally identifiable information contained in feedback/complaint records where the institution maintains education records.
- Applicable state consumer-protection and private-postsecondary/licensing-board complaint-handling rules (e.g., state education agency or occupational licensing board complaint procedures for the relevant service line).
- Internal policy CP-Complaints applies where no sector-specific standard governs a given channel.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

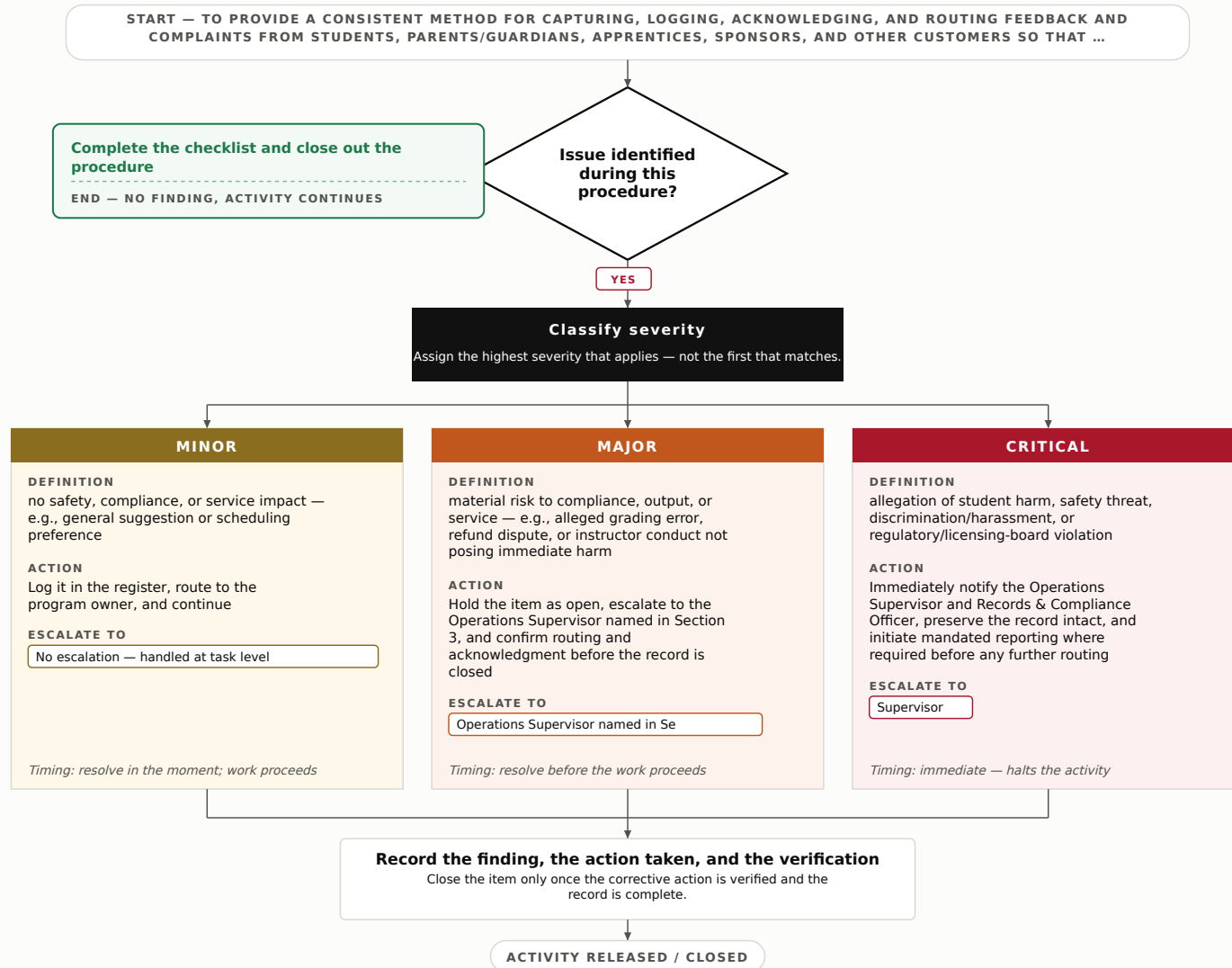


7. Step-by-Step Procedure

1. Receive the feedback or complaint through any intake channel and confirm the customer's identity and contact details (student, parent/guardian, apprentice, sponsor, or agent).
2. Record the item verbatim in the complaint register, noting date/time, channel, program or course affected, and any names cited; avoid paraphrasing the substance.
3. Assign a unique tracking number and mark the record with the intake handler's initials.
4. Screen for personally identifiable and education-record information; restrict access per FERPA and internal privacy policy.
5. Classify severity (see Section 8) with the Operations Supervisor.
6. Issue an acknowledgment to the customer within one business day, stating the tracking number and expected next contact.
7. Route the item to the responsible program or department owner; where investigation is required, hand off per QC-021 without duplicating that procedure here.
8. Update the register with routing destination, timestamp, and status; retain the record per the applicable retention schedule.

8. Decision Tree

Decision Tree — Customer Feedback & Complaint Intake



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every intake item has a unique tracking number and logged timestamp.
- Acknowledgment issued to the customer within one business day.
- Personally identifiable / education-record information is access-restricted per FERPA.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Customer identity and contact details captured		
Item logged verbatim with date, channel, program affected		
Unique tracking number assigned		
Severity classified with Operations Supervisor		
Acknowledgment issued within one business day		
PII / education-record access restricted		
Routing destination and status recorded in register		

11. KPIs

- Acknowledgment within one business day $\geq$ 98%
- Items logged with complete required fields $\geq$ 99%
- Critical items escalated same business day = 100%

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

Phase 5 — Oversight & continuity

OD-024 — Operational Incident Reporting & Response

Estimated completion time: 30-90 minutes per incident (initial report through classification and containment); follow-up resolution may extend across days.

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To provide a consistent method for reporting, classifying, and responding to operational incidents and near-misses that disrupt instruction, enrollment services, scheduling, or facility operations — so that recurrence is prevented and required records are preserved.

2. Scope

Covers operational incidents and near-misses affecting instructional delivery, learner records, scheduling, admissions/registration workflows, and general campus/training-site operations at any educational or training provider. Excludes safety incident reporting, which is covered under SD-018, and equipment breakdown, which is covered under MD-009.

3. Responsibilities

- Operations Coordinator — receives and logs incident reports, assigns preliminary severity, initiates containment, and maintains the incident register.
- Program/Site Supervisor — verifies classification, authorizes holds on affected instructional or administrative workflows, and approves corrective actions.
- Compliance/Records Officer — confirms notification and retention obligations, escalates Critical incidents, and closes out the record.

4. Required PPE & Lockout/Tagout

- Standard facility PPE only; this is an administrative reporting task with no routine physical hazard exposure.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- FERPA (20 U.S.C. § 1232g; 34 CFR Part 99) — governs handling and disclosure of student education records for incidents involving learner data.
- FTC Safeguards Rule (16 CFR Part 314) — requires documented response to incidents affecting customer/student information systems.
- Internal Operations Policy — incident register, classification, and escalation procedures where no sector-specific standard applies.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

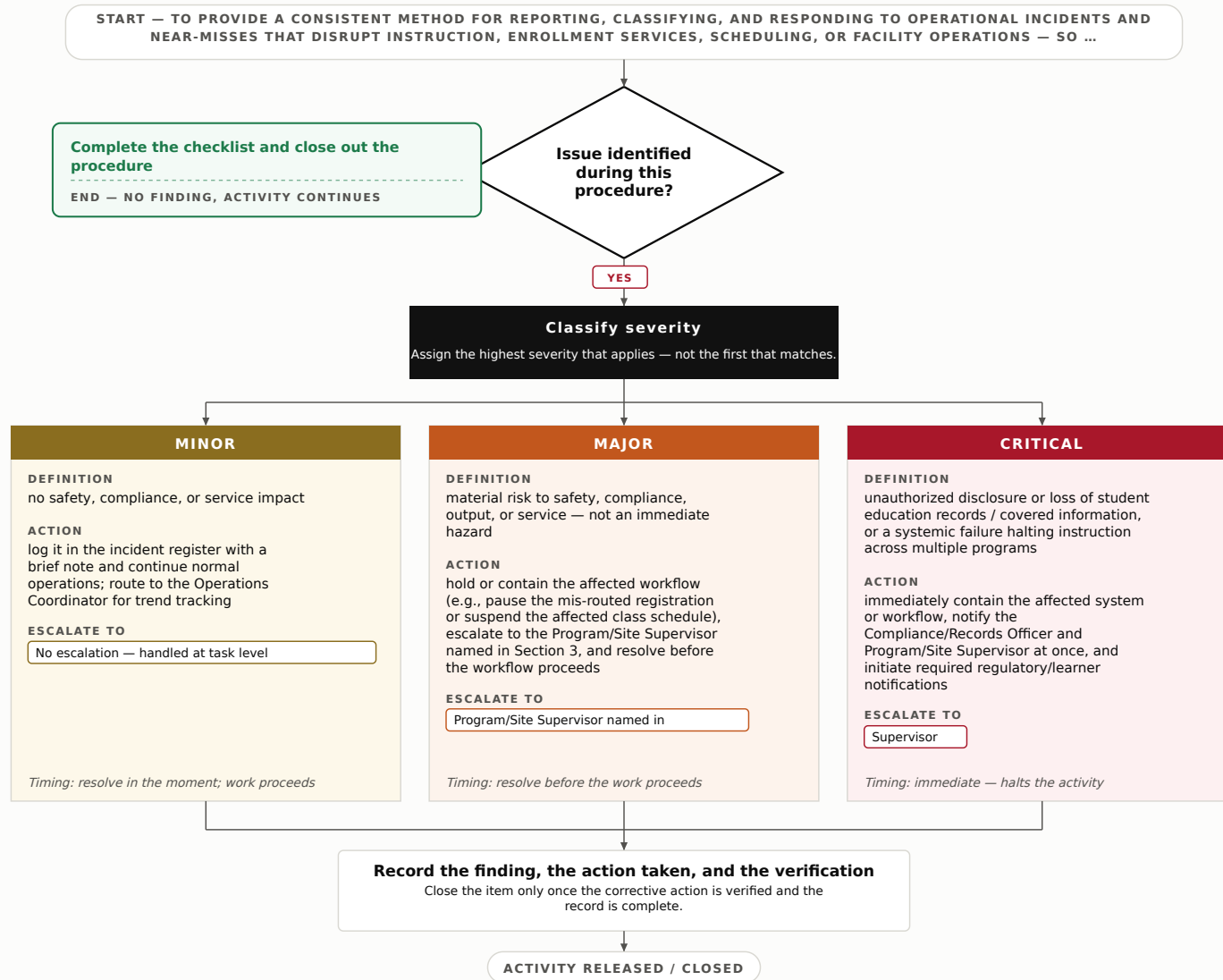
6. Process Flow



7. Step-by-Step Procedure

1. Any staff member who observes an operational incident or near-miss (e.g., missed class session, lost or mis-routed learner record, scheduling collision, admissions data error) reports it to the Operations Coordinator within the same operating day.
2. Operations Coordinator opens an entry in the incident register, capturing date/time, location or program, description, affected workflow, and reporter.
3. Determine whether student education records or covered information were involved; flag the entry for the Compliance/Records Officer if so.
4. Assign a preliminary severity (Minor / Major / Critical) using Section 8.
5. Initiate containment appropriate to severity — place the affected workflow on hold, notify affected learners/staff, and prevent further impact.
6. Program/Site Supervisor reviews and confirms classification; adjusts severity if warranted.
7. Identify and implement corrective action; verify the affected workflow is restored to normal before releasing the hold.
8. Compliance/Records Officer confirms any required notifications, documents root cause and resolution in the incident register, and closes the record (retain per institutional retention schedule).

8. Decision Tree

Decision Tree — Operational Incident Reporting & Response**READING THIS TREE**■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every reported incident has a register entry within one operating day.
- Severity classification confirmed by the Program/Site Supervisor before closure.
- Records-involved incidents reviewed by the Compliance/Records Officer.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Incident logged in register with all required fields		
Severity classified and confirmed		
Affected workflow contained/held where required		
Records/data involvement flagged and reviewed		
Required notifications completed		
Corrective action implemented and verified		
Record closed and retained per schedule		

11. KPIs

- Incidents logged within one operating day of detection $\geq 95\%$.
- Major/Critical incidents contained within 4 operating hours 100%.
- Critical incidents with completed required notifications on time 100%.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-025 — Emergency & Business Continuity Readiness Check

Estimated completion time: 2-4 hours (single facility or service line)

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure verifies that the educational operation can respond to a disruption (facility loss, IT/network outage, weather, or staffing gap) and resume instruction, enrollment, and record-keeping with minimal loss. It confirms continuity documentation, contact chains, and instructional-recovery capability are current and usable.

2. Scope

Covers the periodic readiness verification of business continuity plans, resumption procedures, contact rosters, and critical-record recovery for all instructional and administrative service lines. Excludes emergency drills and live emergency response (see SD-015, SD-016) and backup power systems (see ED-027).

3. Responsibilities

- Operations Manager — owns the continuity plan, schedules the readiness check, and signs off on findings.
- Continuity Coordinator (or designated administrator) — executes the verification steps, updates rosters, and logs gaps.
- Records & IT Custodian — confirms recoverability of instructional and student/enrollment records and system access.

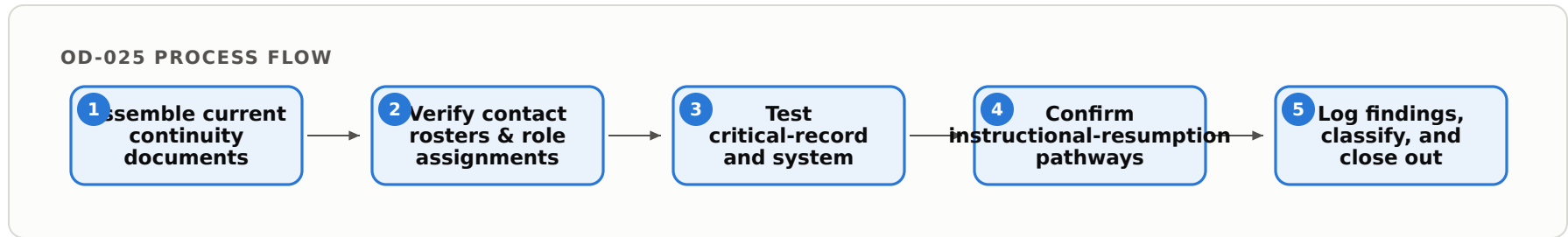
4. Required PPE & Lockout/Tagout

- Standard facility PPE; none required for this document- and system-review task.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- FEMA/DHS Continuity Guidance Circular (voluntary continuity-planning framework applicable to any organization).
- NFPA 1600, Standard on Continuity, Emergency, and Crisis Management (consensus standard applicable across facility-based operations).
- FERPA (20 U.S.C. §1232g) — protection and recoverability of student/education records held by any educational institution.
- OSHA 29 CFR 1910.38 (Emergency Action Plans) where the facility employs staff, as a cross-reference for plan currency (response execution owned by SD-015/SD-016).
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

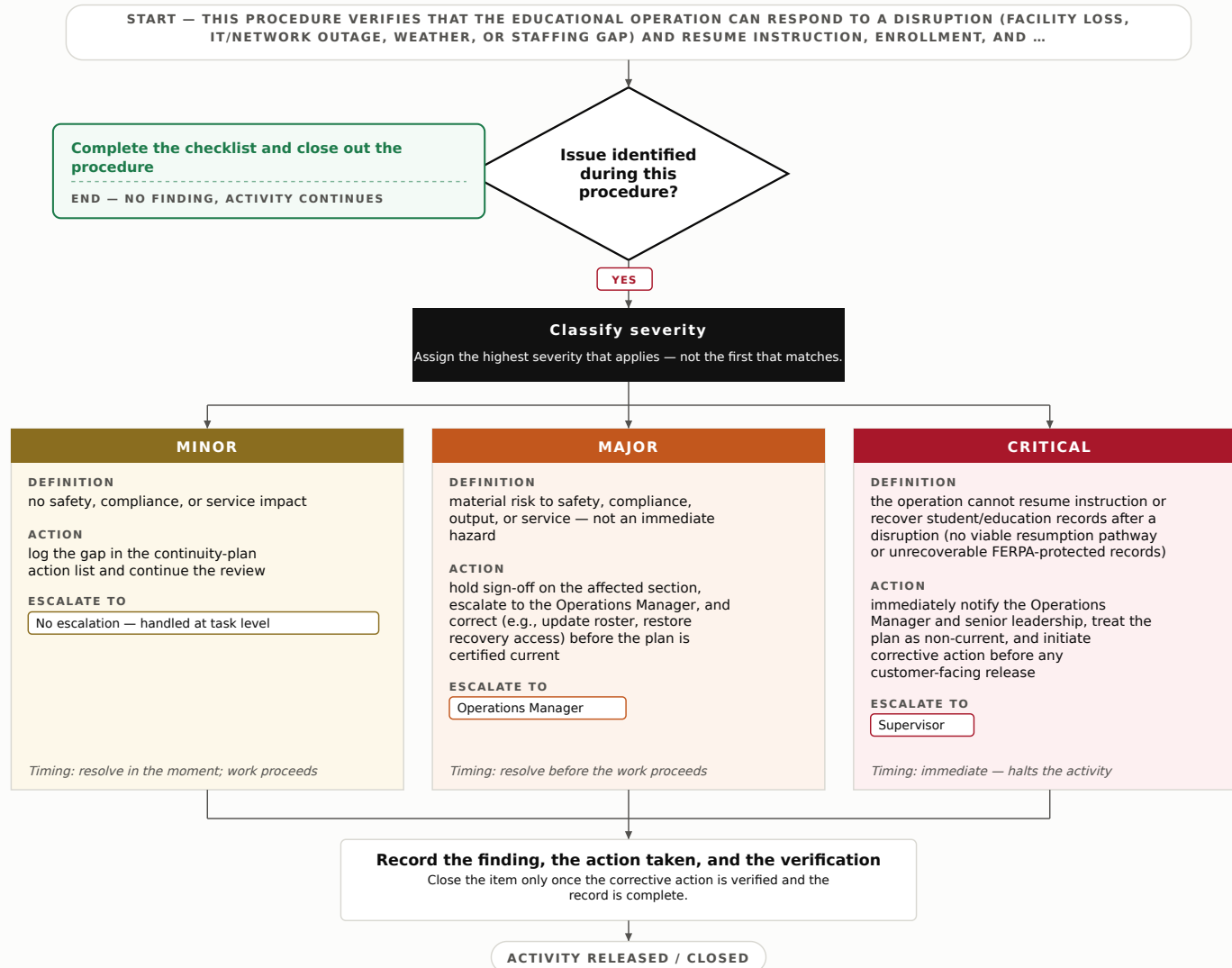
6. Process Flow



7. Step-by-Step Procedure

1. Retrieve the current continuity/resumption plan and confirm revision date is within the review interval (default 12 months).
2. Verify the emergency contact roster — leadership, staff/instructors, students/guardians, and key vendors — for accuracy and completeness; flag any stale entries.
3. Confirm each critical role (site closure decision, communications, records recovery, resumption lead) has a named primary and alternate.
4. With the Records & IT Custodian, verify that student/enrollment records, schedules, and instructional materials can be accessed from an alternate location or backup within the recovery-time objective; confirm FERPA-protected records remain access-controlled during recovery.
5. Confirm alternate-delivery pathways for instruction (alternate site, remote/online continuation, or rescheduling procedure) are documented and viable for the service line.
6. Verify inbound-supply resumption references — replacement instructional and printed materials via Commercial Printing (323111) and Office Supplies Manufacturing (339940), and A/V/instructional equipment via Audio and Video Equipment Manufacturing (334310) — are named with current contacts.
7. Note any dependency on backup power (do not test — see ED-027) and confirm the plan references it correctly.
8. Record all findings, gaps, and corrective actions on the Inspection Checklist and route per the Decision Tree; obtain supervisor verification.

8. Decision Tree

Decision Tree — Emergency & Business Continuity Readiness Check**READING THIS TREE**

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Continuity plan revision date is within the review interval.
- Contact roster verified with named primary and alternate for every critical role.
- Critical records and systems confirmed recoverable within the stated recovery-time objective.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Continuity/resumption plan current and dated		
Contact rosters accurate and complete		
Primary + alternate named for each critical role		
Student/enrollment records recoverable within RTO		
FERPA access controls intact during recovery		
Instructional-resumption pathway documented & viable		
Supply-resumption vendor contacts current		

11. KPIs

- Continuity plan reviewed on schedule: 100% within 12 months.
- Critical-role roster completeness (primary + alternate): 100%.
- Critical records/systems meeting recovery-time objective in verification: $\geq 95\%$.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-026 — Regulatory, License & Permit Currency Verification

Estimated completion time: 3-5 hours per verification cycle (quarterly review; longer at annual roll-up)

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure ensures that every license, permit, registration, and accreditation authorizing the institution to enroll students, deliver instruction, and operate its facilities remains current, unexpired, and correctly scoped. It prevents lapses that would suspend the institution's authority to teach or issue credentials.

2. Scope

Covers verification of institutional operating authorizations — state education agency or licensing-board approvals, occupancy and business permits, accreditor and program approvals, and instructor/staff credential registrations tied to the institution's authority to operate. Excludes occupational safety regulatory compliance, which is covered under SD-028, and permit-to-work authorizations, which are covered under MD-007.

3. Responsibilities

- Operations Compliance Coordinator — maintains the license/permit register, tracks expiration and renewal dates, and runs each verification cycle.
- Campus/Site Operations Manager — confirms facility-level permits (occupancy, business, fire, and, where the service line operates vehicles or aircraft, mobile-fleet registrations) against physical posting requirements.
- Director of Operations — reviews findings, authorizes renewal actions, and signs off closure of each cycle.

4. Required PPE & Lockout/Tagout

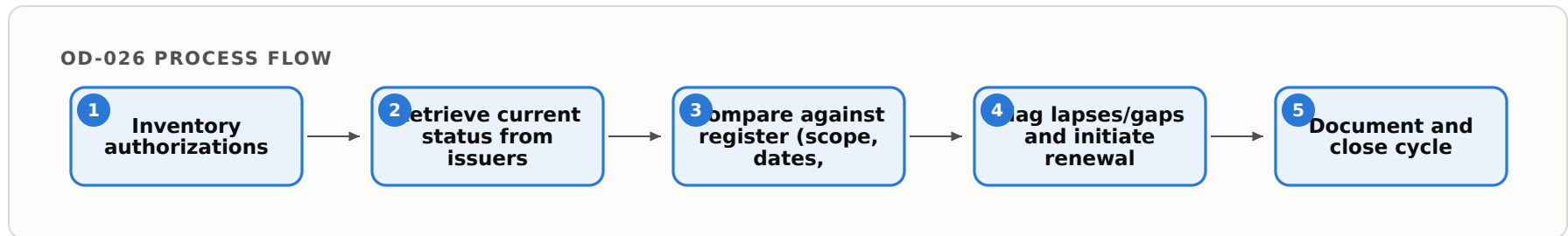
- Standard facility PPE; not applicable to this administrative task.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- State postsecondary/education authorization and licensing statutes administered by the applicable state education agency or state licensing board (every member operates only under a current authorization to instruct).
- Higher Education Act, Title IV / 34 CFR Part 600 (institutional eligibility and program participation, where the institution participates in federal student aid).
- Recognized accreditor standards (institutional or programmatic accreditation required for eligibility and, in many members, for state approval).
- Local business-license and certificate-of-occupancy ordinances applicable to the operating premises.

- e.g., program-specific approvals such as FAA Part 141 (flight training) or state cosmetology/barber board licensure — member-specific examples only, not the governing frame.
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

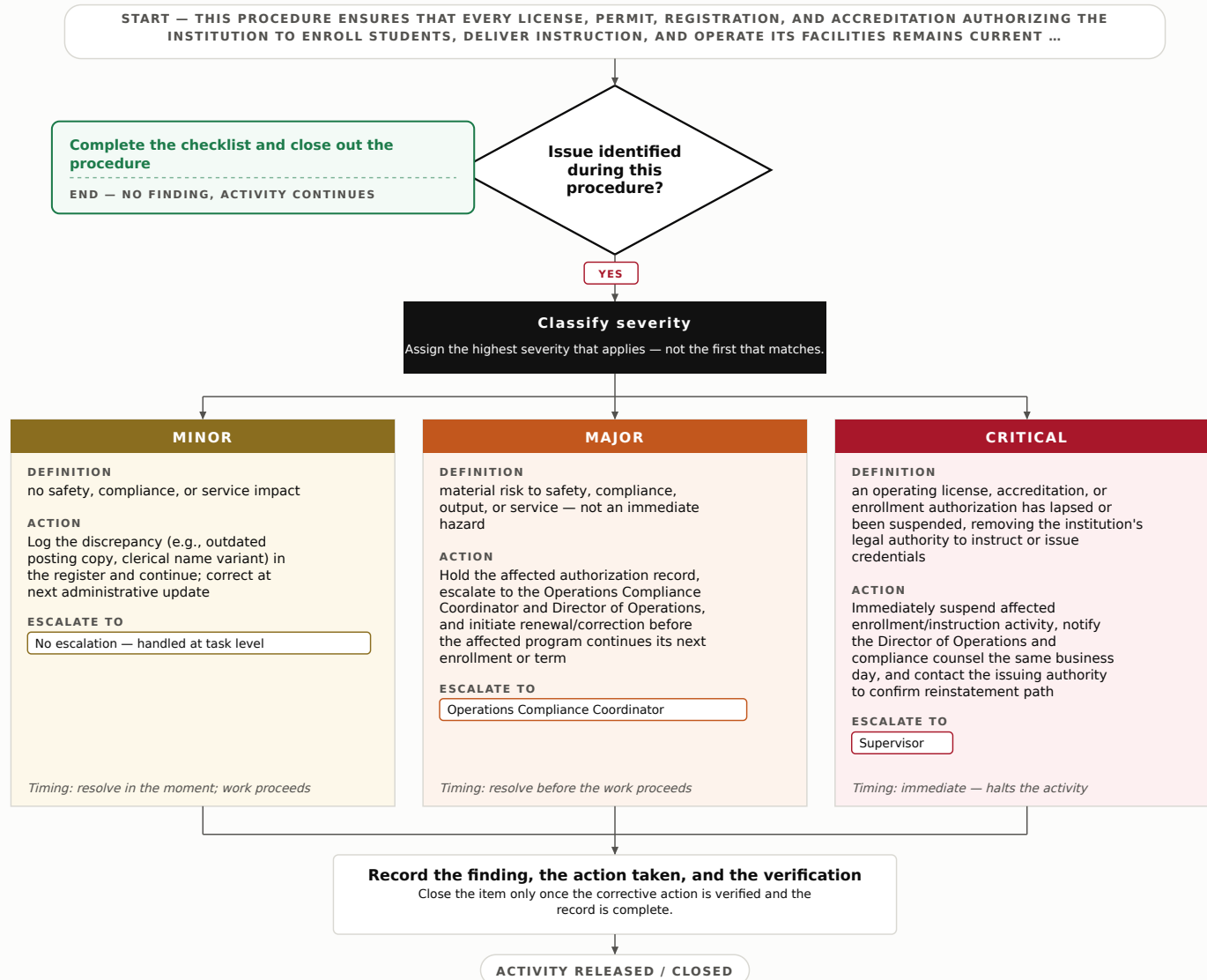


7. Step-by-Step Procedure

1. Open the master license/permit register and confirm every operating authorization is listed with issuer, number, scope, issue date, and expiration date.
2. For each entry, retrieve the current status directly from the issuing authority — state education agency/licensing-board portal, accreditor directory, or local permitting office — rather than relying on the filed copy.
3. Confirm the printed or issued certificates (produced via 323111 Commercial Printing where physical postings are required) match the digital record and are displayed where regulations require public posting.
4. Compare each retrieved status to the register: verify not-expired, correct legal entity name, correct location/campus, and unchanged scope of approved programs or seat capacity.
5. Flag any authorization within 90 days of expiration, any conditional or probationary status, and any scope mismatch against currently delivered programs.
6. Initiate renewal or correction for each flagged item, assign an owner and target date, and record the confirmation/reference number from the issuer.
7. Cross-reference facility postings and occupancy permits with the Campus/Site Operations Manager; confirm hand-off of any safety-permit item to SD-028 without duplicating its review.
8. Record verification date, evidence source, findings, and disposition in the register; attach screenshots or issuer confirmations and route to the Director of Operations for sign-off.

8. Decision Tree

Decision Tree — Regulatory, License & Permit Currency Verification



READING THIS TREE

■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every authorization in the register has a verification entry dated within the current cycle.
- Each verification cites a primary-source confirmation (issuer portal or written notice), not a filed copy alone.
- All items within 90 days of expiration have an assigned owner and renewal target.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Master register lists all operating authorizations with issuer, number, scope, and dates		
Current status confirmed from issuing authority for each entry		
Legal entity name and location match issued authorizations		
Approved program/seat scope matches programs currently delivered		
Required certificates printed/posted where regulations mandate		
Items within 90 days of expiration flagged with owner and target date		
Findings, evidence, and dispositions recorded and routed for sign-off		

11. KPIs

- License/permit currency: 100% of operating authorizations current at all times.
- Renewal lead time: renewal initiated $\geq$ 60 days before expiration on $\geq$ 95% of items.
- Verification completeness: 100% of register entries verified from primary source each cycle.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-027 — Operational Risk Review

Estimated completion time: 3-5 hours per review cycle (quarterly)

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To conduct a periodic, structured review of operational risks and the controls that mitigate them across the institution's instructional delivery, enrollment, records, and facility operations — so that gaps in existing controls are identified and assigned for correction before they disrupt program delivery or trigger regulatory exposure.

2. Scope

Covers the periodic identification, rating, and control-adequacy review of operational risks affecting instruction, scheduling, student records, admissions/enrollment, and vendor-dependent equipment and supplies at the institution. Excludes safety hazard/risk assessment, which is covered under SD-004, and quality preventive action, which is covered under QC-020.

3. Responsibilities

- Operations Manager — owns the risk register, convenes the review, assigns control-gap remediation owners and due dates.
- Program/Compliance Coordinator — supplies regulatory and accreditation risk inputs, verifies control evidence, tracks findings to closure.
- Records & Enrollment Lead — reports risks in student records, admissions data, and information systems; confirms retention and access controls.

4. Required PPE & Lockout/Tagout

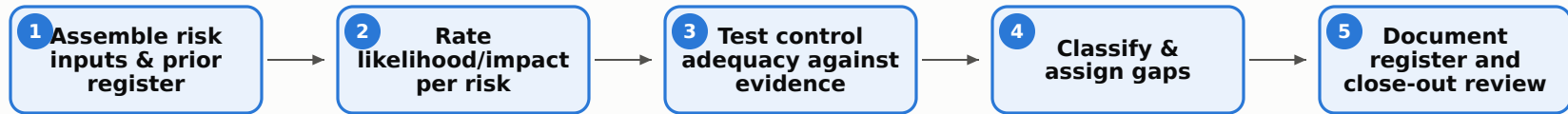
- Standard facility PPE only; this is an administrative review task performed in an office/records setting.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. § 1232g / 34 CFR Part 99 — governs student-record confidentiality and access controls for every institution maintaining education records.
- Americans with Disabilities Act, 42 U.S.C. § 12181 et seq., and Section 504 of the Rehabilitation Act — accessibility of programs and facilities for all education providers.
- Applicable state education/licensing authority operating standards and, where the institution participates, its recognized accrediting body's risk-and-controls requirements (e.g., a state board of proprietary schools or regional/national accreditor).
- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

OD-027 PROCESS FLOW

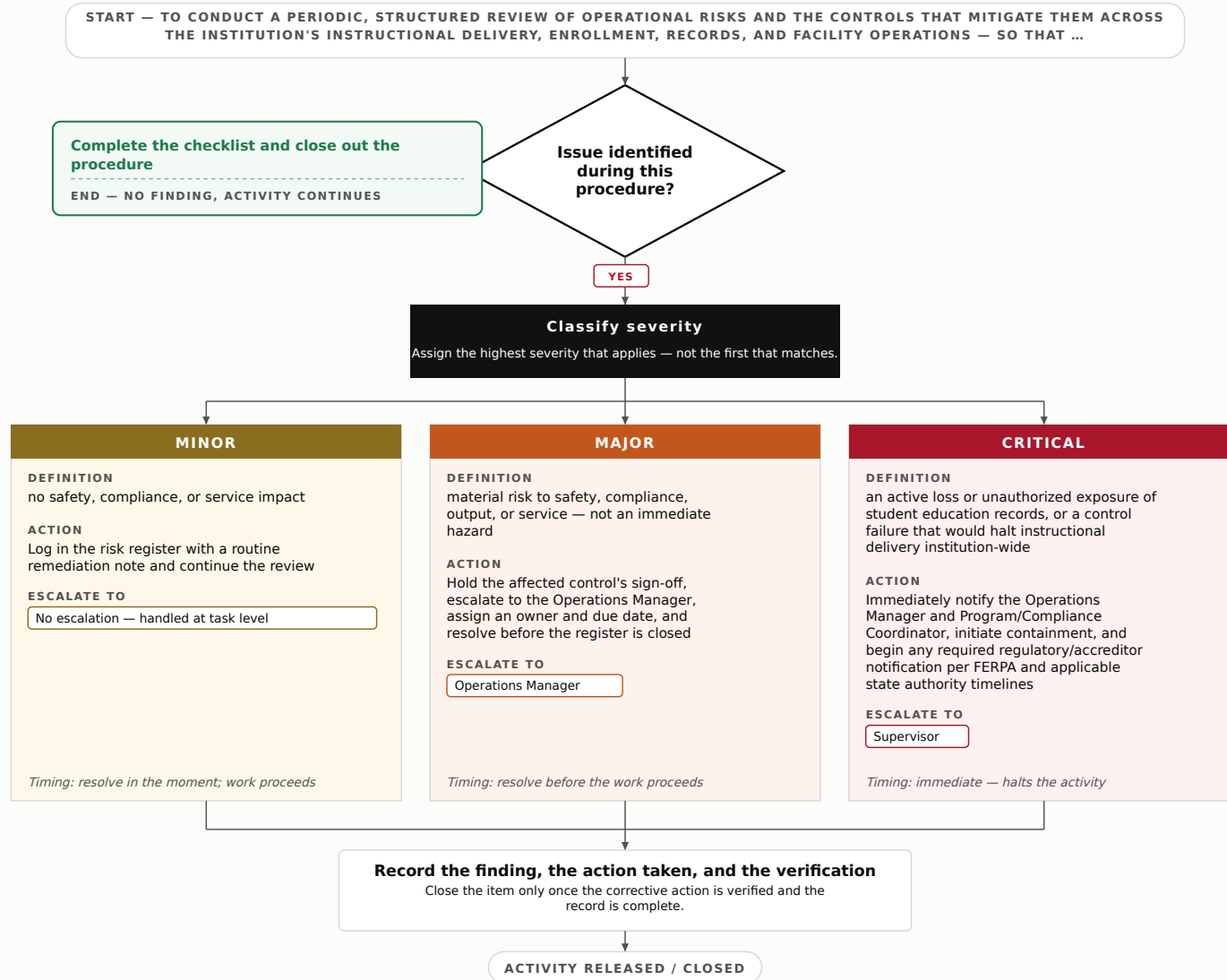


7. Step-by-Step Procedure

1. Retrieve the current operational risk register and the prior review's open items; confirm each carries an owner and status.
2. Gather inputs from Operations, Program/Compliance, and Records & Enrollment: instructional continuity risks, instructor coverage, scheduling/facility dependencies, records/privacy exposure, and equipment/supply availability (audiovisual instructional equipment, printed courseware, office supplies).
3. Rate each identified risk for likelihood and impact using the institution's agreed scale; record the resulting risk level.
4. For each risk, review the stated control and test its adequacy against actual evidence (logs, access lists, vendor delivery records, backup/restore confirmations).
5. Flag any control that is missing, untested, or no longer effective as a finding and classify its severity per Section 8.
6. Assign each finding a remediation owner and due date; note any hand-offs to safety (SD-004) or quality preventive action (QC-020) without duplicating those procedures.
7. Confirm zero unresolved Critical findings before closing; re-rate residual risk where controls were updated.
8. Update the risk register, record the review date and participants, and file the completed record per the institution's retention schedule.

8. Decision Tree

Decision Tree — Operational Risk Review



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every risk in the register carries a current likelihood/impact rating and a named control.
- Each control claimed as effective is supported by verifiable evidence sampled during this review.
- Every finding has a documented owner and due date before close-out.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Prior-review open items reviewed and status confirmed		
All operational domains (instruction, records, enrollment, facility, supply) represented		
Each risk rated for likelihood and impact		
Control adequacy tested against sampled evidence		
Student-records/FERPA access controls verified		
Findings assigned owners and due dates		
Risk register updated, dated, and filed to retention schedule		

11. KPIs

- Review completed on schedule each cycle — 100% of scheduled quarterly reviews on time.
- Findings closed by assigned due date — $\geq 90\%$.
- Unresolved Critical findings at close-out — 0.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

Phase 6 — Performance, records & close

OD-028 — Operational KPI Review

Estimated completion time: 2-4 hours per review cycle

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

This procedure establishes how the Operations team reviews measured operating performance — facility utilization, scheduling adherence, instructional resource availability, and service turnaround — against defined targets so that gaps are identified, root-caused, and corrected across the institution's delivery of educational and training services.

2. Scope

Covers the periodic review of operations-level KPIs for all delivery sites and service lines of the institution, from data collection through corrective routing. Excludes department-specific KPI reviews for instructional/marketing (MD-030), quality/compliance (QC-030), and student/service delivery (SD-030); scope here is operations measures only.

3. Responsibilities

- Operations Manager — owns the KPI framework, validates targets, chairs the review, and approves corrective actions.
- Operations Analyst / Coordinator — compiles source data, prepares the KPI dashboard, and logs findings and variances.
- Site or Program Supervisor — supplies operational data for their site or program and executes assigned corrective actions.

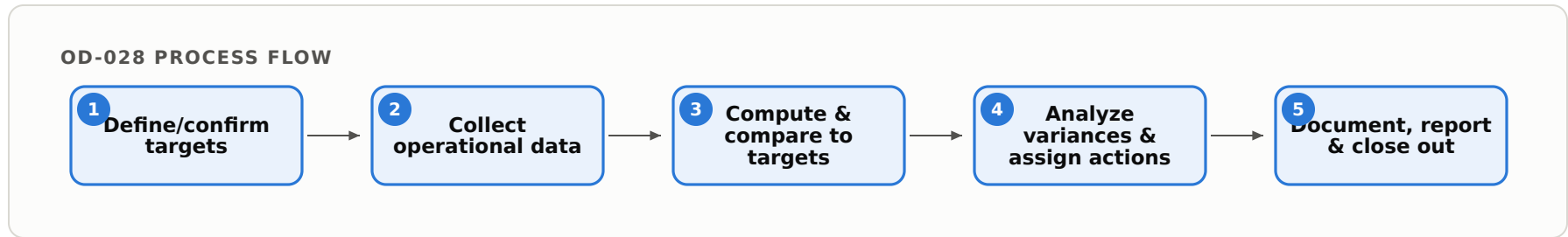
4. Required PPE & Lockout/Tagout

- Standard facility PPE only; this is an administrative review task performed in an office/workstation environment.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- None sector-specific govern operational KPI review across the full span; internal operations policy and the institution's data-governance procedure apply. Applicable general obligations include FERPA (20 U.S.C. §1232g; 34 CFR Part 99) where any metric derives from student records, and record-retention terms of the institution's state authorization/licensure (e.g., state education agency or licensing board conditions). Member-specific regimes (e.g., 14 CFR Part 141/142 for flight training records, or state cosmetology-board clock-hour reporting) may apply as examples only. Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

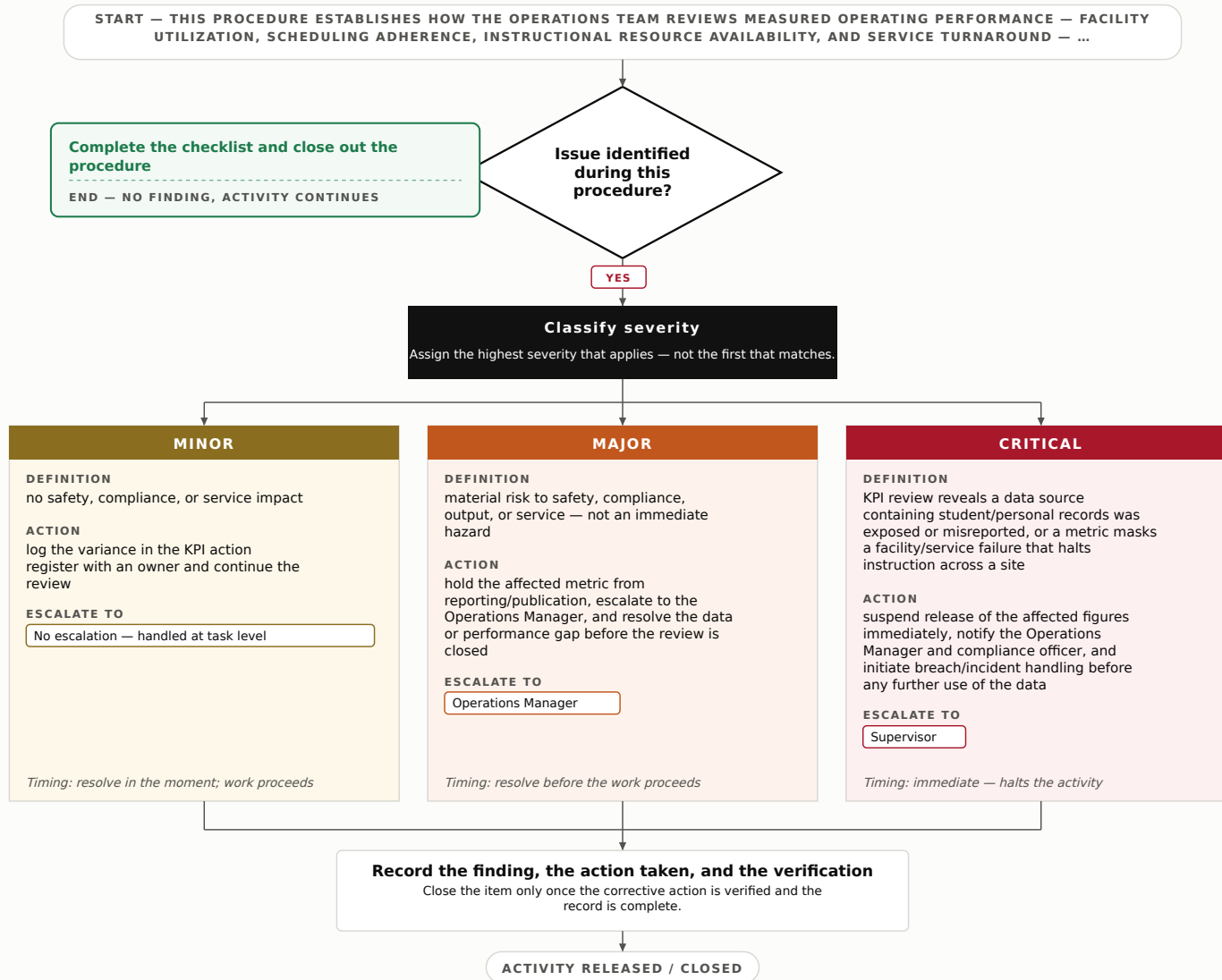


7. Step-by-Step Procedure

1. Confirm the current KPI set and target thresholds against the approved operations framework; verify no targets have lapsed or been superseded since the last cycle.
2. Pull source data for each operational metric — scheduling system, room/lab/seat utilization logs, resource-availability records, and service-turnaround tickets — for the defined review period.
3. Validate data integrity: check completeness per site/program, reconcile against system-of-record counts, and flag any records touching student data for FERPA-compliant handling.
4. Compute each KPI and compare to its target; mark each as on-target, watch, or off-target.
5. For each off-target or watch metric, perform root-cause analysis with the relevant Site/Program Supervisor and distinguish operations causes from causes owned by another department (route the latter per MD-030, QC-030, or SD-030).
6. Assign corrective actions with an owner and due date; classify any issue found using the Decision Tree in Section 8.
7. Present results at the operations review, obtain Operations Manager sign-off on targets, variances, and actions.
8. Record the finalized dashboard, variance notes, action register, and sign-off in the operations records repository per the retention schedule.

8. Decision Tree

Decision Tree — Operational KPI Review



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Every KPI traces to a documented target and a validated source system.
- Data completeness reconciled per site/program before computation.
- Every off-target metric has a root cause and an assigned corrective action with owner and date.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Current target set confirmed against approved framework		
Source data pulled for all sites/programs in scope		
Data reconciled to system-of-record counts		
Student-data metrics handled per FERPA controls		
All off-target metrics root-caused		
Corrective actions assigned with owner and due date		
Dashboard and sign-off filed to retention repository		

11. KPIs

- Facility/resource utilization vs. target — within $\pm 5\%$ of planned utilization.
- Scheduling/service-turnaround adherence — $\geq 95\%$ of sessions or requests met on schedule.
- KPI review completed and signed off — within 5 business days of period close.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-029 — Operational Records Retention & Documentation Audit

Estimated completion time: 3-5 hours per audit cycle (per term or quarter, depending on record volume)

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To confirm that operational records — enrollment logs, attendance and clock-hour records, instructor/course schedules, facility-use logs, and completion/credential-issuance records — are complete, accurate, and retained for the required period, so the institution can substantiate delivery of instruction and satisfy regulator and accreditor requests.

2. Scope

Covers the identification, completeness verification, accuracy checking, and retention confirmation of operational records generated across the institution's service lines (classroom, lab, shop, or flight/field instruction). Excludes quality records (see QC-029), safety records (see SD-029), and HR/personnel records (see HR-029), which are audited under their own modules.

3. Responsibilities

- Operations Records Coordinator — assembles the record inventory, runs the completeness and accuracy checks, and logs findings.
- Operations Manager — approves the retention schedule applied, dispositions expired records, and signs off on the audit.
- Compliance Officer — confirms regulatory and accreditor retention periods and reviews any Major/Critical findings before closeout.

4. Required PPE & Lockout/Tagout

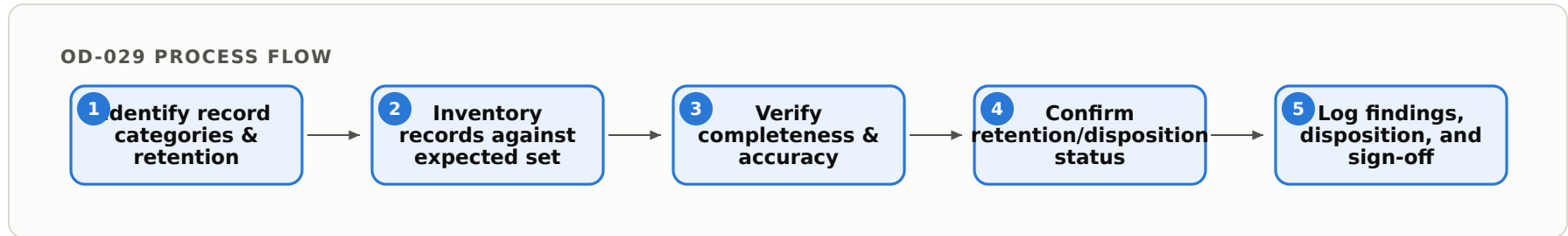
- Standard facility PPE (none specific); this is a records-handling task.
- Not applicable — no hazardous energy involved.

5. Regulatory References

- Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. § 1232g / 34 CFR Part 99 — governs privacy and handling of education records for all institutions maintaining student records.
- 34 CFR § 668.24 (Title IV recordkeeping and retention) — applicable to any institution participating in federal student aid; retention periods for enrollment and program records.
- Applicable state licensing / education-agency recordkeeping rules for the institution's authorization (e.g., state board of private postsecondary education, state department of education, or trade/career-school board).
- Applicable accreditor standards on records retention (e.g., regional or national accrediting body requirements).

- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

6. Process Flow

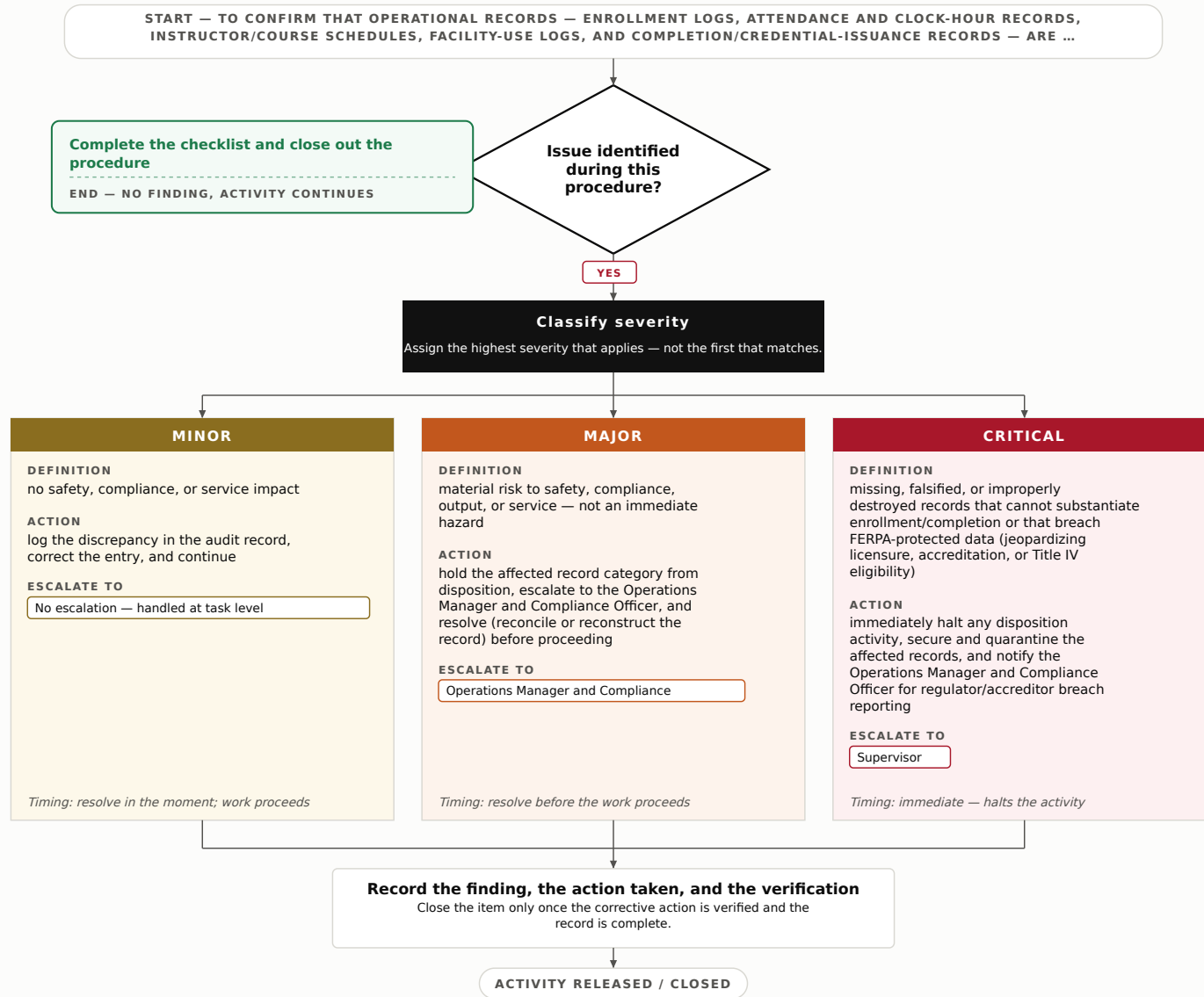


7. Step-by-Step Procedure

1. Pull the current record-retention schedule and confirm the required retention period for each operational record category (enrollment/registration logs, attendance & clock-hour records, course/instructor schedules, facility- and equipment-use logs, completion/credential-issuance records).
2. Generate the expected record inventory for the audit period from the student information / operations system and cross-list against physical and digital storage locations.
3. Verify completeness — confirm every scheduled course, cohort, and completion event has its corresponding record; flag any missing or partial entries.
4. Verify accuracy — spot-check a sample (minimum 10% or 25 records, whichever is greater) against source data: names, dates, hours logged, and outcomes must reconcile with rosters and instructor sign-offs.
5. Confirm retention status — verify records within the retention window are secured and access-controlled per FERPA; identify records past their required period eligible for disposition.
6. Route any record past retention for disposition; execute secure destruction only after Operations Manager approval, and log the disposition (category, volume, date, method).
7. Confirm printed/originals sourced from commercial print vendors (323111) and stored on office supply media (339940) are legible and archived; confirm digital media integrity for AV-recorded instruction (334310) where retained.
8. Document all findings, corrections, dispositions, and sign-offs in the audit record and file the completed checklist.

8. Decision Tree

Decision Tree — Operational Records Retention & Documentation Audit



READING THIS TREE

■ No finding

Activity stands. Complete the checklist and continue.

■ Minor

Handled in place at task level; no escalation.

■ Major

Supervisory decision required before the next stage.

■ Critical

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- Retention schedule current and matched to each record category.
- Completeness reconciliation shows no unexplained gaps against the expected inventory.
- Accuracy sample reconciles to source data within tolerance.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
Retention schedule current and applied to all categories		
Expected record inventory generated for audit period		
Completeness verified — no unexplained missing records		
Accuracy sample ($\geq 10\%$ or 25) reconciles to source		
Records within window secured & FERPA access-controlled		
Past-retention records dispositioned with approval logged		
Findings and sign-offs documented in audit record		

11. KPIs

- Record completeness rate $\geq 99\%$ of expected inventory present.
- Accuracy sample pass rate $\geq 98\%$ reconciling to source data.
- Audit cycles completed on schedule 100% (per term/quarter, no overdue cycles).

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

VERSION	DATE	DESCRIPTION	AUTHOR
1.0	2026-07-27	Generated to the locked 3-page Free/\$99 Standard standard for EDUCATIONAL_SERVICES.	Archetype Content Team

OD-030 — End-of-Shift / End-of-Day Operations Closeout

Estimated completion time: 30–60 minutes

Provided for general informational and operational purposes as part of the Educational Services archetype library. Does not constitute a certified safety program. Verify all regulatory references and equipment-specific tolerances with a qualified engineer or safety professional before implementation.

1. Purpose

To secure, reconcile, and document the operating period at the close of each instructional shift or day so that a training or academic facility ends the period with accurate records, safeguarded facilities and equipment, and a clean forward record. This protects student data, financial accountability, and readiness for the next operating period.

2. Scope

Covers securing instructional and administrative spaces, reconciling attendance/enrollment and receipts, powering down and accounting for shared equipment, and documenting the closed period across all facility-based and field-based training and academic operations. Excludes opening procedures (see OD-001) and shift handover to the next operating crew (see OD-002).

3. Responsibilities

- Operations Supervisor (or Site/Campus Manager) — owns the closeout, authorizes exceptions, signs verification.
- Shift Lead / Duty Instructor-in-Charge — executes room, roster, and equipment close steps; escalates findings.
- Front Office / Records Coordinator — reconciles attendance, enrollment, and receipts; locks the daily record.

4. Required PPE & Lockout/Tagout

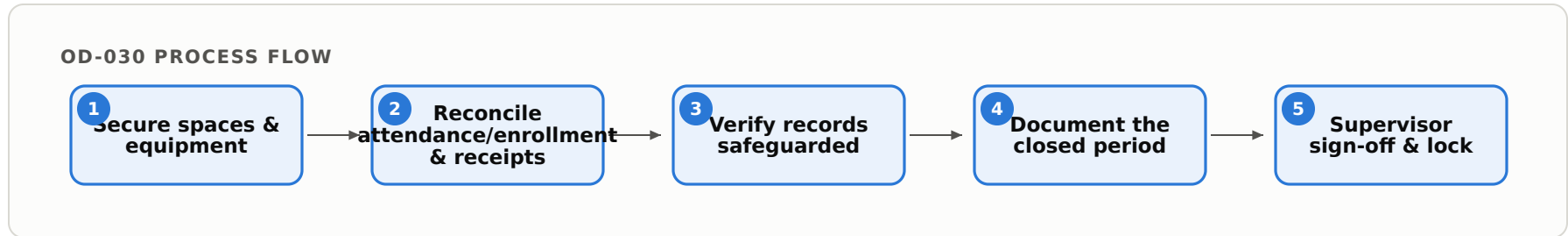
- Standard facility PPE; no specialized PPE required for records or reconciliation work. Where the service line operates lab, shop, or simulator equipment (e.g., trade, cosmetology, or flight training), follow that equipment's shutdown PPE.
- Not applicable — no hazardous energy involved in the administrative closeout. Where powered lab/shop equipment is de-energized at close, follow that equipment's manufacturer shutdown sequence.

5. Regulatory References

- FERPA, 20 U.S.C. § 1232g / 34 CFR Part 99 (protection and safeguarding of student education records at end of period).
- FTC Safeguards Rule, 16 CFR Part 314 (security of customer/student financial information, applicable to institutions handling tuition/financial data).
- Fair Labor Standards Act, 29 CFR Part 785 (accurate recording of hours worked when closing timekeeping).
- OSHA General Duty Clause, 29 U.S.C. § 654(a)(1) (safe facility condition at close); member-specific example only: e.g., 14 CFR flight-training records for aviation members.

- Note: confirm applicability of sector-specific standards and any state-plan equivalents for this facility before customer-facing release.

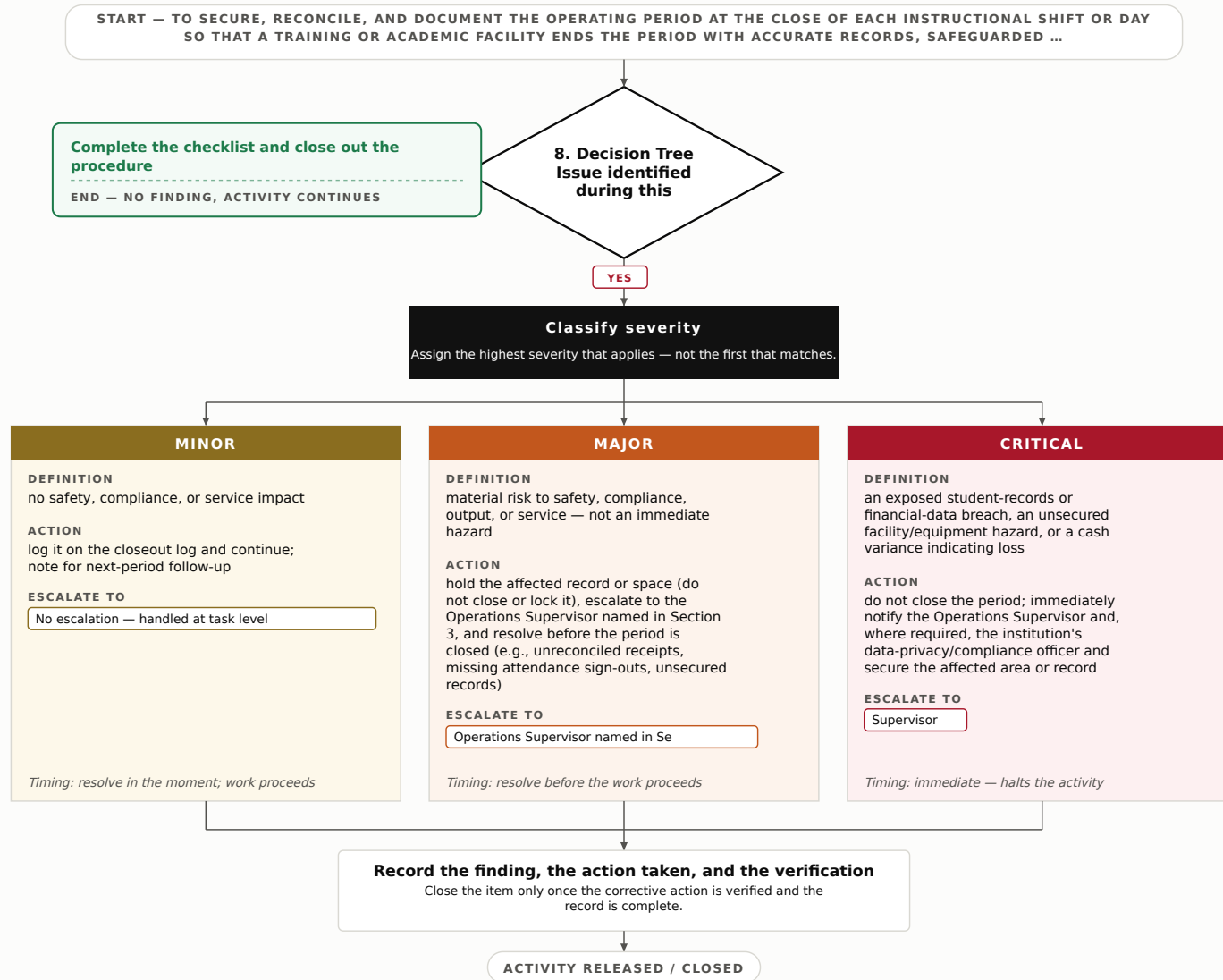
6. Process Flow



7. Step-by-Step Procedure

1. Confirm all instructional and administrative activity for the period has ended and no students or visitors remain in supervised spaces.
2. Walk and secure each room: power down and account for shared instructional equipment (projectors/AV, training PCs, lab/shop or simulator stations), stow consumables, verify locks, lights, and alarms.
3. Reconcile the attendance/enrollment record against the roster; resolve any missing sign-outs or discrepancies before closing.
4. Reconcile receipts and tuition/fee transactions for the period against the point-of-sale or ledger total; document any variance.
5. Secure student education records and financial information — log off systems, lock physical files, and confirm no records left exposed (FERPA / Safeguards Rule).
6. Close and verify the day's timekeeping entries for staff on shift for accuracy.
7. Complete the closeout log and Inspection Checklist, noting exceptions and open items carried forward.

8. Obtain Operations Supervisor verification and lock the daily record.

Decision Tree — End-of-Shift / End-of-Day Operations Closeout**READING THIS TREE**■ **No finding**

Activity stands. Complete the checklist and continue.

■ **Minor**

Handled in place at task level; no escalation.

■ **Major**

Supervisory decision required before the next stage.

■ **Critical**

Activity halts on the spot; escalation is immediate.

9. Quality Checkpoints

- All instructional/administrative spaces confirmed secured, powered down, and accounted for.
- Attendance/enrollment reconciled to roster with zero unexplained discrepancies.
- Receipts/tuition reconciled to ledger; variance documented and within tolerance.
- Zero unresolved Critical findings.

10. Inspection Checklist

ITEM	PASS / FAIL	NOTES
All rooms/spaces secured; locks, lights, alarms verified		
Shared AV/training/lab equipment powered down and accounted for		
Attendance/enrollment reconciled to roster		
Receipts/tuition reconciled to ledger; variance noted		
Student records & financial data secured (systems logged off, files locked)		
Staff timekeeping entries closed and verified		
Closeout log completed; open items carried forward		

11. KPIs

- Closeouts completed within the estimated window: $\geq 95\%$.
- Attendance/receipt reconciliation variance at close: $\leq 1\%$ (unresolved variances: 0).
- Records-security or facility-security findings unresolved at close: 0.

12. Supervisor Verification

Printed Name: _____ Signature: _____ Date: _____

13. Revision History

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