Thank you for your interest in the Standards and Guidelines developed by the Council for the Advancement of Standards in Higher Education (CAS). This CAS member association has permission to post a link to these standards on their website. Standards are developed through a consensus model of member associations and other experts, including the association on whose page this link is found. You are invited to use the attached materials in the design and assessment of your programs and for your staff training and development. These materials may not be duplicated or redistributed for other purposes without permission from CAS.

These standards and all other standards are available along with information on self-assessment procedures in the most recent edition of the book CAS Professional Standards for Higher Education. You are particularly encouraged to examine the learning and developmental outcomes (see www.cas.edu/learningoutcomes) in the design and assessment of your programs.

This set of standards has an accompanying Self-Assessment Guide (SAG) available for purchase from www.cas.edu for use in program evaluation.

CAS MISSION STATEMENT

CAS, a consortium of professional associations in higher education, promotes the use of its professional standards for the development, assessment, and improvement of quality student learning, programs, and services

CAS STANDARDS AND GUIDELINES

Each set of CAS standards contains 12 common criteria categories (referred to as "general standards") that have relevance for each and every functional area, no matter what its primary focus. In addition to the general standards, all functional area standards are comprised of both specialty standards and guidelines. All standards use the auxiliary verbs “must” and “shall” and appear in bold print so that users can quickly identify them. Guidelines are designed to provide suggestions and illustrations that can assist in establishing programs and services that more fully address the needs of students than those mandated by a standard. CAS guidelines appear in regular font and use the auxiliary verbs “should” and “may.”

OVER FORTY YEARS OF PROFESSIONAL SERVICES

The Council for the Advancement of Standards in Higher Education (CAS) has been the pre-eminent force for promoting standards in student affairs, student services, and student development programs since its inception in 1979. For the ultimate purpose of fostering and enhancing student learning, development, and success and in general to promote good citizenship, CAS continues to create and deliver a dynamic and credible book of professional standards and guidelines and Self-Assessment Guides that are designed to lead to a host of quality-controlled programs and services. These standards respond to real-time student needs, the requirements of sound pedagogy, and the effective management of over 45 functional areas, consistent with institutional missions. Individuals and institutions from more than 40 CAS member organizations comprise a professional constituency of over 115,000 professionals.

DISCLAIMER

The standards and guidelines published in CAS Professional Standards for Higher Education by the Council for the Advancement of Standards in Higher Education (CAS) and referred to in each of the CAS Self-Assessment Guides (SAGs) are developed through the voluntary efforts of leaders of professional associations in higher education. The purpose of the standards and guidelines is to identify criteria and principles by which institutions may choose to assess and enhance various areas of their academic, administrative, or student affairs programs and services. CAS specifically disclaims any liability or responsibility for any perceived or actual shortcomings inherent in the text or application of the standards. Further, CAS does not certify individuals nor accredit programs. No institution, whether it has met some or all of the CAS standards, is authorized to indicate that it is “approved, endorsed, certified, or otherwise sanctioned by CAS.” Institutions that have conducted a self-assessment of one or more functional areas addressed by CAS Standards and Guidelines using the appropriate CAS Self-Assessment Guide (SAG) may, where that self-assessment provides evidence that an institution meets these standards, make accurate representations to the effect that the designated program or service meets the CAS Standards.

Please direct your questions to the CAS Executive Director (executive_director@cas.edu or 202-862-1400).
ORIENTATION PROGRAMS  
CAS Contextual Statement

Historical Perspective
To understand current trends in orientation programs, it is helpful to view today's practice within a historical context. The history of orientation programs in the United States is virtually as old as the history of the country's colleges and universities. In the 1640s at Harvard, dons and tutors were expected to “counsel and befriend the young lads” in order to support them in their transition to college (Morison, 1936). More formal orientation programming can be traced to both Harvard and Boston College in 1888 (Butts, 1971; Drake, 1966). Harvard is credited with creating a system by which current students supported new students in their transition to college (Upcraft, Gardner, & Associates, 1989), a model that persists today. Later in the 19th century, Harvard institutionalized faculty-student contact by assigning faculty members educational and administrative responsibilities outside the classroom.

Important tenets
Today, most orientation programs provide a clear and cogent introduction to the intellectual, cultural, and social facets of the institution. Orientation is viewed as an important tool for student recruitment, acculturation, and retention (Jacobs, 2003).

The structure and content of orientation programs today vary widely and are based on the needs and expectations of the institution and student population. At the core, new student orientation programs are a key step in the persistence of students at an institution. Quality orientation programs strive to facilitate academic and social integration (Pascarella & Terenzini, 1983; Pergio & Upcraft, 1989; Tinto, Goodsell Love, & Russo, 1993), create a sense of belongingness (Tinto, 2017), assist parents and other family members in understanding the collegiate environment and how to support their student, and assist the institution in devoting specific time and learning more about incoming students (Cuseo, 2003; Pergio & Upcraft, 1989). Programs have evolved from simply providing students with individualized faculty attention to focusing on important issues and responding to the needs of an increasingly diverse student and family population.

Facilitating the transition to new academic expectations, culture, and rigor is an essential piece of orientation programs. Programs must provide opportunities for new students and family members to learn about their academic opportunities, expectations, and support services. In addition, establishing a positive connection between academic advisors and new students is a key factor in student success. Therefore, most institutions include academic advising and registration for classes as part of their orientation programs.

Recognizing the limitations of hosting a singular, 1-3 day orientation program, many institutions have moved to an intentional, comprehensive orientation curriculum designed to deliver just-in-time programming that spans initiatives throughout the first semester or year. Institutions have adopted first-year experience programs and/or courses (Pergio & Upcraft, 1989), welcome week activities, workshop series, or supplemental orientation initiatives, such as orientation camps and outdoor initiatives, to complement the traditional 1-3 day orientation program. These initiatives engage students in a variety of ways to introduce them to the expectations, culture, and traditions of the institution. Increasingly colleges and universities are developing more expansive and extended orientation programs that begin with post-acceptance communication and continue throughout the first year. These programs address the diverse transitional needs of students and their families.
Orientation or first-year offices have also evolved. As the complexity of programs coordinated through the office has increased, so too has the number of professional, graduate, and paraprofessional student staff working in the office. Most programs rely extensively on highly trained and motivated paraprofessional staff (peer orientation leaders) in the achievement of the orientation program mission.

A wide variety of professional development opportunities exist for orientation professionals and paraprofessionals. The most established professional organization specifically founded for orientation professionals is the Association for Orientation, Transition and Retention in Higher Education (NODA). Founded in 1976 and a founding member of CAS in 1977, NODA provides education, leadership, and professional development in the field of student orientation, transition, and retention. A number of other professional associations including NASPA and ACPA have communities of practice focused on orientation as a subset of their associations. The National Resource Center for the First-Year Experience and Students in Transition also serves to advance efforts to improve student learning and transition in the first year.

**Current Issues**

What trends will guide future approaches to orientation programs? It is certain that acculturation, retention, and the impact on student success will continue to be a major focus in the development and implementation of orientation programs. With student success as an emphasis, we may see a change in the purpose and content of orientation programs from being largely transactional (signing up for classes, meal plans, parking, etc) to more relational in nature, with an emphasis on a positive-growth mindset. As such, orientation professionals will need to evaluate ways to deliver more transactional orientation content to students and family members through new technologies, such as pre- and post-orientation online modules and apps. Funding for orientation programs will continue to be a matter of concern. Many orientation programming initiatives are asked to operate as an auxiliary (self-sustaining), which must be balanced with the rising cost of tuition and fees and which have an impact on students from lower socio-economic levels. Demographic changes in institutions of higher education and society at large will require new institutional and programmatic responses. Likewise, attempts to foster environments responsive to the individual needs of students and families will have a significant effect on orientation programming. Increasingly, students from historically minoritized groups are looking to orientation programs and the broader campus culture for a sense of belonging.

As the structure of institutions change, orientation professionals must be able to adapt programming to meet the needs of all new students. As online education grows, for example, institutions must envision new types of orientation programs to help students succeed in a technology-based, asynchronous learning environment that requires new ways of communicating with classmates and instructors. Practitioners must assess and implement new and creative programs and methodologies to meet the personal and educational needs of new students and their families.

For many institutions, orientation programs may be the only means of delivering information to all students. As such, we will continue to see orientation programs specified as the vehicle to deliver legislatively mandated content to new students. A more recent example includes mandated programs to prevent dating violence, domestic violence, sexual assault, and stalking, and includes both primary prevention and awareness programs directed at incoming students through the Violence Against Women Act Amendments to the Clery Act. Orientation professionals must be adept at understanding
student development and transition to plan out a thoughtful orientation curriculum that complies with an increasing number of mandates.

Research, assessment, and evaluation are vital to effective orientation programs and must include evidence of program impact, both immediate and longitudinal, on the achievement of student learning and developmental outcomes. The CAS Orientation Programs Standards and Guidelines that follow have utility for national and international institutions and provide criteria by which to evaluate the quality, effectiveness, and appropriateness of orientation programs.

REFERENCES


CONTEXTUAL STATEMENT CONTRIBUTORS

Current Edition
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ORIENTATION PROGRAMS
CAS Standards and Guidelines

Guiding Principle: Students and Their Environments

PART 1. MISSION

1.1 Programs and Services Mission

Orientation Programs (OP) must facilitate the transition of new students into the institution; prepare students for the institution’s educational opportunities and student responsibilities; and initiate the integration of new students into the intellectual, cultural, and social facets of the institution. Central to the mission of OP is the inclusion of parents/guardians and families in support of the new student. OP must also contribute to institutional enrollment management, including retention.

OP must develop and define its mission.

The OP mission must be consistent with the mission of the department, college, division, institution, and applicable professional standards.

The OP mission must be appropriate for the institution’s students, designated clients, and other constituents.

Whether centralized or decentralized in its administration, OP must advance its mission.

1.2 Mission Statement

OP must implement, disseminate, regularly review, and update its mission statement.

Mission statements must reference student learning, development, and success.

PART 2. PROGRAM AND SERVICES

2.1 Program and Services Goals

Orientation Programs (OP) must be guided by a set of written goals and objectives that are directly related to the stated mission.

The OP goals must be aligned with institutional priorities and expectations of the functional area.

OP must regularly develop, review, evaluate, and revise its goals.

OP must communicate goals and progress toward achievement to appropriate constituents.

2.2 Program Information and Services

OP must provide relevant information, services, and resources consistent with its mission and goals.
OP must aid students and their parents/guardians and families in understanding the nature and purpose of higher education, the mission of the institution, and their membership in the community.

OP components may include welcome programs, credit and non-credit courses, seminars, adventure programs, service-learning experiences, summer or common reading programs, living-learning communities, interest groups, web-based educational opportunities, comprehensive mailings, electronic communications, and campus visitations.

OP must articulate the institution's expectations of students and provide information that clearly identifies relevant administrative policies, procedures, and programs to enable students to make well-reasoned and well-informed choices.

Such expectations may include scholarship, integrity, conduct, financial obligations, and the ethical use of technology.

OP must inform new students, as well as their parents/guardians and families, about the availability of institutional services and programs. Information about personal health, disability resources, safety, and security must also be included.

OP must provide new students with information about the physical layout of the campus, including the location and purposes of campus facilities, support services, co-curricular venues, and administrative offices.

OP must provide new students with information about technology resources used to conduct institutional business and scholarly work including information about student information systems, library resources, electronic databases, email, and online course software.

OP should also present information about how to manage responsible and ethical use of institutional technology resources.

For students enrolling in online programs, OP must provide information about how to access virtual support services and administrative offices.

OP must provide new students, as well as their parents/guardians and families, with information about laws and policies regarding educational records and other protected information.

OP should emphasize the independence of students in accomplishing their goals while acknowledging their interdependence with their peers and families.

OP must introduce students to the learning and development opportunities that will occur throughout the collegiate experience.

OP must engage qualified faculty, staff, or peer advisors to explain class scheduling, registration processes, and campus life.

OP should assist students in the selection of appropriate courses and course levels, making use of relevant placement examinations, entrance examinations, and academic records.

OP must inform students about the institution's history, traditions, and culture to facilitate affinity and integration.
OP must design and facilitate intentional opportunities for new students to interact with fellow new students as well as continuing students, faculty, and staff members.

OP must develop and implement strategies for outreach and promotion.

2.3 Program Structure and Framework

OP must have clearly stated, current, relevant, and documented
- goals and outcomes
- policies and procedures
- responsibilities and performance expectations for personnel
- organizational charts demonstrating clear channels of authority

OP must be purposefully structured and resourced to balance efficiency and effectiveness and to achieve programmatic and student learning and development outcomes.

The size, nature, and complexity of the institution should guide the administrative scope and structure of OP.

OP may be administered through multiple institutional offices.

OP must coordinate in the delivery of structured activities, even though a number of offices may be involved.

All institutional offices involved in program delivery should be involved in the review of administrative policies and procedures as related to their roles within the orientation program.

Regardless of organizational structures, OP must work in close consultation and collaboration with others with expertise and resources to meet the needs and interests of students and designated clients.

OP must collaborate with colleagues and departments across the institution to promote student learning, development, and success.

2.4 Program Design

OP must be intentionally designed to
- achieve predetermined student learning and development outcomes
- incorporate research and theories on student learning, development, and success
- respond to needs of individuals, constituents, and populations with distinct needs
- ensure access for students and designated clients

OP should continue as a process to address transitional events, issues, and needs. The orientation process should include pre-enrollment, entry, and post-matriculation services and programs.

PART 3. STUDENT LEARNING, DEVELOPMENT, AND SUCCESS

3.1 Program Contribution to Student Learning, Development, and Success
Orientation Programs (OP) must contribute to students’ formal education, which includes both curricular and co-curricular experiences.

OP must contribute to students’ progression and timely completion of educational goals.

OP should design and facilitate opportunities for new students to discuss their expectations and perceptions of the institution and to clarify their personal and educational goals.

OP must help students and designated clients prepare for their careers and meaningful contributions to society.

OP must work with the institution to identify relevant and desirable student success outcomes.

OP must identify relevant and desirable student learning and development outcomes.

OP must implement strategies and tactics to achieve these outcomes.

3.2 Student Learning and Development Domains and Dimensions

OP must align predetermined student learning and development outcomes with the CAS learning outcomes model or other recognized student learning and development models.

OP must align predetermined student learning and development outcomes with the institutional framework for student outcomes.

The CAS student learning and development outcomes model includes six broad categories (called domains), meant to identify the aspects of learning experienced by students through engaging with programs, disciplines, or other learning opportunities. The domains are further clarified through dimensions. The dimensions of student learning and development allow for a more focused assessment approach and opportunities for alignment with institutional mission and priorities.

Domain: knowledge acquisition, integration, construction, and application

- Dimensions: understanding knowledge from a range of disciplines; connecting knowledge to other knowledge, ideas, and experiences; constructing knowledge; and relating knowledge to daily life

Domain: cognitive complexity

- Dimensions: critical thinking, reflective thinking, effective reasoning, and creativity

Domain: intrapersonal development

- Dimensions: realistic self-appraisal, self-understanding, and self-respect; identity development; commitment to ethics and integrity; and spiritual awareness

Domain: interpersonal competence

- Dimensions: meaningful relationships, interdependence, collaboration, and effective leadership

Domain: humanitarianism and civic engagement
Dimensions: understanding and appreciation of cultural and human differences, social responsibility, global perspective, and sense of civic responsibility

Domain: practical competence

Dimensions: pursuing goals, communicating effectively, technical competence, managing personal affairs, managing career development, demonstrating professionalism, maintaining health and wellness, and living a purposeful and satisfying life

[Learning and Development Outcomes: See the Council for the Advancement of Standards Student Learning and Development Outcomes (www.cas.edu/learningoutcomes) for examples of outcomes related to these domains and dimensions.]

3.3 Assessment of Student Learning and Development

OP must assess the student learning and development outcome domains and dimensions relevant to the functional area.

OP must provide evidence of the extent to which student learning and development outcomes are achieved.

OP must provide evidence of the extent to which student success outcomes are achieved.

OP must use evidence to create strategies for improving student learning, development, and success.

PART 4. ASSESSMENT

4.1 Establishing a Culture of Assessment

Orientation Programs (OP) must develop assessment plans and processes that document progress toward achievement of mission, goals, outcomes, and objectives.

OP must design assessment plans that incorporate an ongoing cycle of assessment activities.

OP must have fiscal, human, professional development, and technological resources to develop and implement assessment plans.

4.2 Program Goals, Outcomes, and Objectives

OP must identify goals, outcomes, and objectives to guide its work.

OP must identify assessment methods that will allow for the collection of relevant data on its goals, outcomes, and objectives.

When collaborating with other departments on assessment activities, these activities must be consistent with the OP mission and assessment plan.

4.3 Assessment Plan and Process
OP must structure assessment initiatives using the steps of the assessment cycle:
- set program goals, outcomes, and objectives
- develop and implement assessment plan
- review and interpret findings
- develop a plan for data use, continuous improvement, and reassessment
- implement an improvement plan
- review and monitor changes that have been made

OP must implement the assessment process with methods that reflect universal design principles.

OP must employ ethical practices in the assessment process.

OP must implement assessment processes in a way that is culturally responsive, inclusive, and equitable.

OP must engage students, faculty, staff, administrators, and other relevant constituents in assessment activities.

4.4 Gathering Evidence

OP must identify priorities for assessment, including both formative and summative approaches.

OP must employ multiple methods and measures of data collection.

OP must develop manageable processes for gathering, interpreting, and evaluating data.

OP must adhere to institutional policies related to data access and management.

OP must ensure measures and methods are rigorous and reflect characteristics of validity, reliability, and trustworthiness.

4.5 Review and Interpret Findings

OP must use methods to analyze and interpret data that correspond with objectives and questions considered within overall assessment goals.

OP must disaggregate data to address the objectives and questions considered in the assessment project.

4.6 Reporting Results and Implementing Improvement

OP must use assessment results to demonstrate student learning, development, and success.

OP must use assessment results to demonstrate effectiveness and continuous improvement.

OP must use evidence from assessment activities to inform decision-making and planning for continuous improvement.

OP must monitor improvements implemented based on assessment results.
OP must apply results for future planning.

OP must inform constituents of assessment results and how data have been used for continuous improvement.

Guiding Principle: Advocating for Diverse, Equitable, and Inclusive Communities

PART 5. ACCESS, EQUITY, DIVERSITY, AND INCLUSION

5.1 Inclusive and Equitable Educational and Work Environments

Within the context of each institution’s mission and in accordance with institutional policies and applicable codes and laws, Orientation Programs (OP) must create and maintain educational and work environments for students, faculty, staff, administrators, designated clients, and other constituents that are welcoming, accessible, inclusive, equitable, and free from bias or harassment.

OP must not discriminate on the basis of race; color; national origin; sex; disability; age; cultural identity; ethnicity; nationality; citizenship; family educational history (e.g., first generation to attend college); political affiliation; religious affiliation; sexual orientation; gender identity and expression; marital, family, social, economic, place of residence, or veteran status; or any other basis included in codes, laws, and institutional policies.

5.2 Organizational Aspects of Access, Equity, Diversity, and Inclusion

OP must provide equitable access to facilities and resources for all constituents.

OP must respond to the needs of all constituents when establishing hours of operation and developing methods for delivering programs, services, and resources.

OP must identify and address actions, policies, and structures within its operation that perpetuate systems of privilege and oppression.

5.3 Advocating for Access, Equity, Diversity, and Inclusion

OP must advocate for accessible facilities and resources, and address issues that impede access.

OP must advocate for inclusion, multiculturalism, and social justice within the institution.

OP must enact culturally responsive, inclusive, respectful, and equitable practices in the provision of services.

OP must develop plans for ongoing professional development on cultural competence and workplace inclusion.

5.4 Implementing Access, Equity, Diversity, and Inclusion

OP must establish goals for access, equity, diversity, and inclusion.
OP must address the characteristics and needs of diverse constituents when establishing and implementing culturally relevant and inclusive programs, services, policies, procedures, and practices.

OP should take into account needs of international students as well as students enrolled in online programs when designing and delivering programs.

First-year, transfer, and entering graduate students, as well as their parents/guardians and families, should be served as distinct populations.

OP must ensure that personnel are trained in diversity, equity, access, and inclusion and are held accountable for applying the training to its work.

OP must have an established protocol for, and foster expectation of, bias incident reporting.

Personnel within OP must cultivate understanding of identity, culture, self-expression, and heritage.

Personnel within OP must promote respect for commonalities and differences among people within their historical and cultural contexts.

When educational and/or workplace accommodations are requested, OP must provide individuals with an interactive process to determine reasonable accommodations.

*Guiding Principle: Organization, Leadership, and Human Resources*

**PART 6. LEADERSHIP, MANAGEMENT, AND SUPERVISION**

6.1 Leadership

Orientation Programs (OP) leaders must model ethical behavior and demonstrate alignment with institutional mission, goals, and ethical practices.

Leaders with organizational authority for OP must provide management and supervision as well as lead strategic planning and program advancement.

OP leaders must
- create a vision for the functional area
- communicate goals
- model and expect commitment
- build teams, coalitions, and alliances
- influence others to contribute to the effectiveness and success of the unit
- advance diversity, equity, access and inclusion goals in the workplace
- incorporate data and information in decision making
- develop a risk management plan for the organization
- incorporate sustainable practices in the design of programs, services, and facilities
- develop and empower new leaders from within the organization
- collaborate with colleagues and departments across the institution
- adhere to organizational constraints

OP leaders must advance the functional area by
• advocating for and actively promoting the functional area’s mission and goals
• communicating with constituents about current issues affecting the profession
• identifying and addressing individual, organizational, and environmental conditions that foster or inhibit mission achievement
• facilitating discussion and decisions regarding program advancement
• advocating for representation in strategic planning processes at departmental, divisional, and institutional levels

6.2 Management

OP managers must
• be empowered to demonstrate effective management
• plan, allocate, and monitor the use of fiscal, physical, human, intellectual, and technological resources
• develop plans for scholarship, leadership, and service to the institution and the profession
• engage diverse perspectives from within and outside the unit to inform decision making

6.3 Supervision

OP supervisors must
• incorporate institutional policies and procedures in the development of strategies for recruitment, selection, professional development, supervision, performance planning, succession planning, evaluation, recognition, and reward of personnel
• consult with institutional HR personnel to access and receive education and training that influence successful performance of personnel
• provide feedback on personnel performance
• identify and resolve workplace conflict
• follow institutional policies for addressing complaints
• provide reports and activity updates to management
• work with personnel to develop plans for scholarship, leadership, and service to the profession and institution
• provide supervision and support so that personnel may complete assigned tasks

6.4 Strategic Planning

OP leaders, managers, and supervisors must facilitate ongoing strategic planning processes that
• facilitate continuous development, implementation, assessment, and evaluation of program effectiveness and goal attainment congruent with institutional mission and ongoing planning efforts
• support ongoing assessment activities that improve student learning, development, and success
• utilize philosophies, principles, and values that guide the work of the functional area
• promote environments that provide opportunities for student learning, development, and success
• develop, adapt, and improve programs and services in response to the needs of changing environments, populations served, and evolving institutional priorities
• engage many diverse constituents and perspectives from within and outside the unit to inform the development and implementation of the planning process
• result in a vision and mission that drive short- and long-term planning
• set goals and objectives based on the needs of the populations served, intended student learning and development outcomes, and program outcomes

PART 7. HUMAN RESOURCES

7.1 Staffing and Support

Orientation Programs (OP) must identify the level of staffing necessary to achieve its mission and goals.

OP must be staffed by individuals qualified to accomplish its mission and goals. Personnel include full-time and/or part-time faculty, staff, administrators, and paraprofessionals (e.g., student employees, interns, graduate assistants, and volunteers).

OP must have access to technical and support personnel to accomplish its mission.

OP professional personnel either must hold an earned graduate or professional degree in a field relevant to their position or must possess an appropriate combination of educational credentials and related work experience.

7.2 Employment Practices

OP must establish procedures and expectations for personnel recruitment, selection, training, supervision, performance, and evaluation.

OP leaders must
• ensure that all personnel have written position descriptions
• regularly review position descriptions
• maintain copies of up-to-date resumes/curriculum vitae for all currently employed personnel
• implement recruitment and selection/hiring strategies that demonstrate a deliberate effort to diversify the workforce
• develop promotion practices that are fair, inclusive, proactive, and non-discriminatory

OP leaders must establish, in partnership with personnel and aligned with institutional policies, work arrangements (e.g., schedules, remote work) that achieve department objectives.

Personnel within OP must have written performance goals, objectives, and outcomes for each performance cycle to be used to plan, review, and evaluate work and performance. The performance plan must be updated regularly to reflect changes during the performance cycle.

Results of individual personnel evaluations must be used to recognize personnel performance, address performance issues, implement individual and/or collective personnel development and training programs, and inform the assessment of OP.

7.3 Personnel Training and Development

OP personnel must receive training when hired and professional development throughout their employment.
OP personnel must engage in continuing professional development activities to keep abreast of the research, theories, legislation, policies, and advancements that affect its programs and services.

OP must provide personnel with appropriate professional development opportunities or resources that facilitate individual professional development goals and improve competence, skills, and leadership capacity.

OP personnel must have access to resources and receive specific training on policies, procedures, and laws related to
- the programs and services they support
- privacy and confidentiality
- student records and sensitive institutional information
- systems and technologies necessary to perform their assigned responsibilities
- sexual misconduct, harassment, and workplace violence

OP personnel must be trained on how to recognize and address systems of oppression in the workplace and facilitate a welcoming, inclusive work environment.

OP personnel must be trained on how and when to refer those in need of additional assistance to qualified personnel, and must have access to a supervisor for assistance in making these judgments.

OP leaders must ensure that personnel are knowledgeable about and trained in safety, emergency procedures, identifying threatening conduct or behavior, crisis prevention, response, and reporting.

7.4 Paraprofessional Personnel

Paraprofessionals working in OP must be enrolled in an appropriate field of study and/or have relevant experience.

Paraprofessionals working in OP must be carefully selected, trained, supervised, and evaluated by personnel who possess applicable educational credentials, work experience, and have supervisory experience.

Paraprofessionals working in OP must be informed as to the limits of their authority, the expectation for appropriate role modeling, and their potential influence on new students.

OP leaders must accommodate the dual roles paraprofessionals may have as both student and employee.

OP leaders must
- adhere to parameters of paraprofessionals' job descriptions
- articulate intended student learning and development outcomes in student employee job descriptions
- adhere to agreed-upon work hours and schedules
- offer flexible scheduling options as needed by the student employee
- work with paraprofessionals to determine suitable compensation if circumstances necessitate additional hours
Part 8. Collaboration And Communication

8.1 Collaboration

Orientation Programs (OP) personnel must collaborate and consult with institutional leaders, faculty, individuals, and departments essential to the success of the program.

OP should involve faculty members in the development, delivery, planning, and, where possible, staffing of OP programs and services.

OP must collaborate with individuals, groups, communities, and organizations to
- establish, maintain, and promote understanding and effective relations
- garner support and resources
- meet the needs of students, designated clients, and other constituents
- achieve program and student outcomes
- engage diverse populations to enrich the educational environment
- disseminate information about programs and services
- solve problems pertinent to the student population, designated clients, or the organization

OP should engage in an institution-wide process of planning and implementation that systematically involves student affairs, academic affairs, and other administrative units, such as parent and family programs, public safety, physical plant, athletics, college bookstore, and the business office.

OP should collaborate with offices that coordinate supplemental orientation programs.

OP must refer students, designated clients, and other constituents to appropriate resources when assistance is needed beyond the functional area's scope.

8.2 Communication

OP must provide relevant information, services, and resources that explain its mission and goals.

OP must develop and implement strategies for outreach and promotion.

OP promotional and descriptive information must be accurate and free of deception and misrepresentation.

8.3 Procedures and Guidelines

OP must have and follow procedures and guidelines consistent with institutional policy for
- communicating with the media
- distributing information through print, broadcast, and online sources
- the use of social media
- contracting with external organizations for delivery of programs and services
- developing relationships with donors
- dissemination of relevant information in a timely manner to all constituents

Guiding Principle: Ethical Considerations

PART 9. ETHICS, LAW, AND POLICY
9.1 Ethical Statements

Orientation Programs (OP) must review and adopt appropriate standards of ethical practice including those of applicable professional associations.

OP must have clearly defined and documented ethical statements addressing
- conflicts of interest, or appearance thereof, by personnel in the performance of their work
- management of institutional funds
- acceptance, in gratis, of cash or merchandise in accordance with institutional advancement reporting policies
- solicitation of gifts, in accordance with institutional advancement reporting policies
- research and assessment with human participants or animal subjects
- confidentiality of research and assessment data
- personnel, student, and other designated clients’ rights and responsibilities
- disclosure of information in student, personnel, and other designated clients’ records

9.2 Ethical Practice

OP personnel must employ ethical decision making in the performance of their duties.

OP personnel must recognize and avoid conflicts of interest that could adversely influence their judgment or objectivity and, when unavoidable, recuse themselves from the situation.

OP personnel must be honest, objective, and impartial in their interactions.

OP must demonstrate responsibility for sound and ethical assessment, research, evaluation, and program review.

OP must encourage and provide a forum for personnel to address and report unethical behavior.

OP must address issues surrounding scholarly integrity.

OP personnel must perform duties within the scope of their position, training, expertise, and competence.

OP personnel must make referrals when issues presented exceed the scope of their position.

9.3 Legal Obligations and Responsibilities

OP must comply with laws, regulations, policies, and procedures that relate to its respective responsibilities and that pose legal obligations, limitations, risks, and liabilities for the institution as a whole.

In accordance with governmental laws, institutional policy, and standards of good professional practice, OP personnel who are concerned about students’ well-being must ensure that they are referred to appropriate resources.

OP must have a process for accessing legal advice needed for personnel to carry out their assigned responsibilities.
OP must not discriminate based upon institutional policies, codes, or governmental laws.

OP must purchase or obtain permission to use copyrighted materials and instruments. References to copyrighted materials and instruments must include appropriate citations.

9.4 Policies and Procedures

OP must have written policies and procedures on operations, transactions, or tasks that have legal implications.

OP must have and follow a timeline for reviewing policies and procedures. The creation and revision of policies and procedures must be informed by available evidence, and policies and procedures that inform the management of higher education.

OP must have policies and procedures consistent with institutional policy for responding to threats, emergencies, and crisis situations.

9.5 Communication of Ethical and Legal Obligations

OP must educate new personnel to relevant ethical standards, statements of ethical practice, and related institutional policies and procedures.

OP must inform its users of ethical and legal obligations and limitations emanating from codes and laws or from licensure requirements.

OP personnel must provide students, designated clients, and constituents with information about student privacy rights and personnel’s disclosure obligations.

OP must create ongoing opportunities to explore and examine basic ethical beliefs important to the functional area.

OP must inform personnel about internal and external governance organizations that affect the functional area.

OP must inform personnel about professional liability insurance options and refer them to external sources if the institution does not provide coverage.

9.6 Addressing Harassment and Hostile Environments

OP personnel must neither participate in nor condone any form of harassment or activity that demeans persons or creates an intimidating, hostile, or offensive environment.

OP must adhere to institutional policies and procedures regarding sexual misconduct, harassment, and workplace violence.

Guiding Principle: Learning-Conducive Structures, Resources, and Systems

PART 10. FINANCIAL RESOURCES

10.1 Funding
Orientation Programs (OP) must have the funding that is necessary to accomplish its mission and goals.

OP should be funded through institutional resources.

In addition to institutional funding, other sources may be considered, including state appropriations, student fees, user fees, donations, contributions, concession and store sales, rentals, and dues.

When OP overnight programs require students and their parents/guardians and families to stay on campus, room and board costs may be recovered directly from participants.

OP should make resources available, such as grants, loans, or fee waivers, for students and their families who are unable to afford the cost associated with orientation.

**OP must determine with administrative leadership what funding is necessary.**

10.2 Financial Planning

In establishing and prioritizing funding resources, OP must conduct comprehensive analyses to determine

- unmet needs of the unit
- relevant expenditures
- external and internal resources
- impact on students and the institution

OP must use the budget as a planning tool to reflect commitment to the mission and goals of the functional area and of the institution.

OP financial reports must provide an accurate financial overview of the organization and provide clear, understandable, and timely data upon which personnel can plan and make informed decisions.

10.3 Financial Management

OP must manage funds in accordance with established governmental laws and institutional policies, procedures, and guidelines.

OP must demonstrate responsible stewardship and use of fiscal resources.

OP must have procedures and guidelines consistent with institutional policy for applying to and managing funds from external resources.

OP must be provided with the institutional and financial resources to assist with professional development of personnel.

OP procurement procedures must

- be consistent with institutional policies
- ensure that purchases comply with laws and codes for usability and access
- ensure that the institution receives value for the funds spent
consider information available for comparing the ethical and environmental impact of products and services purchased

PART 11. TECHNOLOGY

11.1 Systems Management

Orientation Programs (OP) must have current technology to support the achievement of its mission and goals.

OP must incorporate accessibility features into technology-based programs and services.

OP must ensure that personnel and constituents have access to training and support for technology use.

OP must back up data on a cycle established in partnership with the institution’s information technology department.

OP must implement a replacement plan and cycle for all technology with attention to sustainability.

11.2 User Engagement

OP must use technology to enhance the delivery of programs and services for all constituents.

OP must ensure that technology addresses constituent needs.

OP must employ technologies that facilitate user interaction.

OP must provide secure remote access.

11.3 Compliance and Information Security

OP must have policies on the appropriate use of technology that are clear and easily accessible.

OP must comply with governmental codes and laws and with institutional technology policies and procedures.

OP must provide a secure platform when conducting financial transactions, in accordance with industry best practices.

11.4 Communication

OP must have updated websites that provide information to all constituents in accessible formats.

OP must use technology that allows users to communicate sensitive information in a secure format.

OP must evaluate relevant social media platforms and techniques for communication, and implement those that best meet constituent needs.
OP must evaluate multiple modes of communication including, but not limited to, phone, text, and web chat.

PART 12. FACILITIES AND INFRASTRUCTURE

12.1 Design of Facilities

Orientation Programs (OP) facilities must be located in suitable spaces designed to support the functional area’s mission and goals.

OP must secure cooperation from the campus community to provide appropriate facilities to implement programs and services.

OP should advocate for priority in scheduling or reserving campus facilities for formal orientation programming.

OP facilities must be intentionally designed to engage various constituents, promote learning, and provide accessible and safe spaces.

OP should have adequate workspace that is conveniently located and suitable for its high level of interaction with the public.

Whenever possible, OP should maintain a single accessible location for personnel.

OP facilities must be designed to protect the security and privacy of records and ensure the confidentiality of sensitive information and conversations.

OP must incorporate universal design principles.

OP facilities must be designed and constructed to be energy-efficient and sustainable.

12.2 Work Space

OP personnel must have equipped and well-maintained workspaces designed to support their work and responsibilities.

OP personnel must be able to safeguard the privacy of their work.

12.3 Equipment Acquisition

When acquiring capital equipment, OP must take into account expenses related to regular maintenance and life cycle costs.

OP must incorporate sustainable practices when purchasing equipment.

12.4 Facilities and Equipment Use

OP facilities and equipment must be inspected on an established cycle and be in compliance with codes, laws, and established practices for accessibility, health, safety, and security.
OP must promptly report broken, malfunctioning, defective, unusable, or faulty facilities and equipment to the entity responsible for maintenance.

OP must develop sustainable practices for facilities use.

OP must assess the effectiveness of its facilities to ensure they are meeting facilities and equipment goals.

OP personnel must advocate for appropriate, consistent, and fair assignment of facilities and equipment.

General Standards revised in 2018;
OP content developed/revised in 1986, 1996, 2005, & 2013

The OP Standards and Guidelines should be considered in conjunction with the OP Contextual Statement, CAS Glossary of Terms, and CAS Guiding Principles.