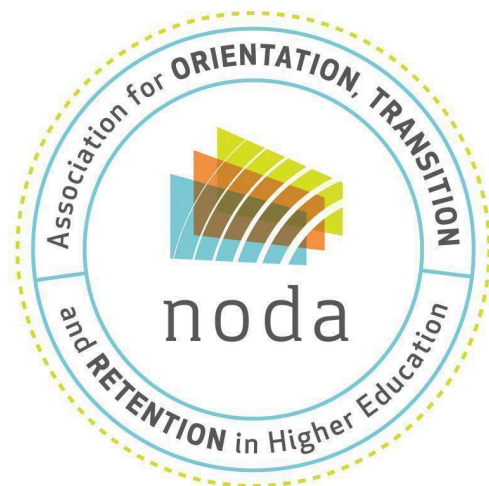


**NODA**  
**Association for Orientation, Transition and  
Retention in Higher Education**

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**Standard Operating Procedures**



October 2023

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*NOTE: Any updates or changes to the SOP must have approval of the Executive Director*

**NODA**  
**Association for Orientation, Transition and Retention in Higher Education**

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**Standard Operating Procedures**

**GUIDELINES FOR SUSTAINABILITY AND PRACTICES**

- Explore the incorporation of actions that promote a sustainable environment.
- Consider the social, economic and environmental impacts of policies and actions.
- Promote, educate and explore best practices in sustainability for NODA, members, and higher education institutions.
- Consider NODA's Sustainability Statement when making decisions regarding the association's actions.
- Work with Associate Members, suppliers, and customers to promote effective and meaningful environmental best practices including, but not limited to, purchasing on g and promoting renewable products, limiting paper and non-recyclable product purchases, and ensuring fair trade and human rights policy compliance.
- Minimize waste from conference and association activities including, but not limited to, limiting paper use, fully realizing the effectiveness of on-line resources and supporting venues which support the Sustainability Statement of the National Orientation Directors Association.
- NODA updates and reports to member constituents on sustainability efforts.
- Research on-line alternatives for evaluations, surveys and other actions that require large amounts of paper to be used.
- Provide conference session handouts online before or after the conference.
- Meet with other campus offices to create an awareness of sustainability during your programs
- Teach about sustainable practices during orientation programs and welcome weeks.
- Make it known that sustainability is a concern that your office believes is a priority. Look for "green" giveaways for conferences and programs

## **Conflict of Interest Policy**

### **Purpose**

The purpose of the conflict of interest policy is to protect NODA's interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of a volunteer or staff member of NODA. This policy is intended to supplement, but not replace, any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

### ***Definitions***

#### **Interested Person**

Any appointed or elected volunteer or staff member with governing board delegated powers, who has a direct or indirect financial or personal interest in a NODA transaction, agreement, policy as defined below.

#### **Financial Interest**

- Person has a financial interest if the person has, directly or indirectly, through business, investment, other nonprofit involvement, or family,
- An ownership, compensation, or investment interest in any entity with which NODA has a transaction or arrangement,
- A *potential* ownership, compensation, or investment interest with any entity or individual with which NODA is negotiating a transaction or arrangement,
- Compensation includes direct and indirect payment as well as substantial gifts or favors. Whether a gift or favor is considered substantial is up to the discretion of the group governing the conflict of interest in question,
- A financial interest is not necessarily a conflict of interest. A person who has a financial interest may have a conflict of interest only if the NODA Board of Directors decides that a conflict of interest exists.

#### **Personal Interest**

- A person may have personal interests if the individual obtains, either directly or indirectly, a non-financial benefit or advantage that they would not have obtained absent their relationship with the Association
- Personal interests may also exist when a person's duty or responsibility owed to the Association conflicts with a duty or responsibility owed to another organization: seeking to obtain preferential treatment by the Association for themselves or relative or business associate

- Making use of confidential information obtained from the Association for their own benefit or for the benefit of a relative, business associate, or other organization; or taking advantage of an opportunity or enable a business, organization or family to take advantage of an opportunity which they have reason to believe would be of interest to the Association

### **Notice**

Each volunteer and staff member with governing board delegated powers shall annually disclose any possible conflicts of interest and sign a statement which affirms that they have: received, read and understand the policy; agree to comply with the policy; and understands that NODA, as a non-profit association, must engage primarily in activities which accomplish its mission.

### ***Procedures***

#### **Duty to Disclose**

In regards to any actual or possible conflict of interest, the person in question must disclose the existence of the possibility and be given the opportunity to disclose all facts to the members of the NODA Board of Directors considering the proposed transaction or arrangement.

#### **Determining Whether a Conflict of Interest Exists**

After disclosure of the financial interest and all relevant facts, and after any discussion with the interested person in question, he/she shall leave the NODA Board of Directors meeting while the determination of a conflict of interest is discussed and voted upon. The remaining NODA Board of Director members shall decide if a conflict of interest exists.

#### **Addressing the Conflict of Interest (If a valid conflict of interest is determined)**

The person involved in the conflict of interest surrounding a NODA transaction may make a presentation at the NODA Board of Directors meeting, but after the presentation he/she shall leave the meeting during the discussion and vote on the transaction.

- The President of the NODA Board of Directors shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement
- After exercising due diligence, the NODA Board of Directors shall determine which entity (i.e. vendor/individual), to do business with. The NODA Board of Directors shall determine by a majority vote whether the transaction is in NODA's best interest, for its own benefit, and whether it is fair and reasonable
- Any volunteer or staff member may report a suspected conflict of interest to the NODA Board of Directors

#### **Violations of the Conflicts of Interest Policy**

- If the NODA Board of Directors has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis

for such belief and give the member an opportunity to explain the alleged failure to disclose

- If, after hearing the member's response and after making further investigation as warranted by the circumstances, the NODA Board of Directors determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action

### **Annual Policy Review**

Each volunteer and staff member with governing board delegated powers shall annually (Fall) sign a statement which affirms that they:

- Have received a copy of the conflict of interest policy
- Have read and understands the policy
- Has agreed to comply with the policy and
- Understands the Organization is charitable and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes

### **Elections Process**

#### **Application**

- Application Packet Requirements
  - General Application with the following fields to be completed by candidates:
    1. Name
    2. Title
    3. Institution
    4. Email
    5. Telephone #
    6. Region
    7. Question: "Why are you applying for an elected position and what skills/experience will you bring to this role?" (up to 350 words)
    8. Question: "Please describe what your commitment to diversity, equity and inclusion means to you. Provide examples of how you have embodied and/or implemented DEI Initiatives, practices and/or strategies ?(up to 350 words)
    9. List below the volunteer roles you have served (within NODA or other associations.) <checkboxes of general leadership roles will be provided>
- Resume with NODA Involvement Highlighted
- Standardized Institutional Support Form that includes expected hours per week dedicated to position and approximate cost of attending meetings & conferences - signed by supervisor.



- Submission of a 90 second introduction video

**Application Review Process**

- The Leadership Development subcommittee for Candidate Review & Elections would affirm a candidate meets the minimum qualifications using a rubric developed through the committee to check off requirements.
- ALL applicants who meet the minimum qualifications would be placed on the ballot.
- Materials released to the general membership for voting would not include personal contact information on any of the candidates.

**Election Timeline**

Year-around	Recruitment of potential candidates
Second week of July	Application process begins. Follow up with nominated individuals and other qualified leaders to apply for positions.  <i>Rubrics of content required should be made available by this point.</i>
First week of October	Mentor sign-up deadline.  <i>This can serve either to review documents or as an opportunity to connect virtually w/ a current/past leader.</i>
Annual Conference	Final push for interest. In-person meetings to include a general session for members interested in learning more about NODA leadership opportunities with additional individual mentor opportunities.
Third Thursday of November	Final Materials due.
Monday after Thanksgiving (US holiday)	Voting begins

### **Ad-Hoc Committees/Task Forces**

Ad-hoc committees or task forces will be formed around specific board or Association priorities as needed and operate for a finite time frame. Committee membership should be based on expertise and specified interest, and general Association members should be encouraged to participate. If appropriate expertise cannot be found on the Board or within the Association, outside consultants should be considered.

### **Annual Conference Program Committee Selection**

An application process managed by the Association Office will invite NODA members to apply for the Annual Conference Program Chair and Committee. The selection of the Annual Conference Program Chair will be facilitated by the Associate Executive Director that will include one additional Association staff, ACAC Chair and at least one past annual conference program chair. The Committee selection is in partnership with the Annual Conference Program Chair and the Associate Executive Director.

### **Institute Faculty Selection**

NODA members interested in serving as faculty members or lead faculty must submit an application for consideration. A review committee consisting of the President-Elect, Educational Initiatives Chair, one faculty member and Executive Director/or designee will select the lead faculty and members. The Executive Director/or designee will determine the faculty member to serve on the review committee. Lead faculty do not pay registration fees for the institute they are planning.

### **NODA Networks**

***Institutional Networks*** are designed to serve a specific institution type and their interests to the NODA leadership, members and the higher education community. These communities also serve the membership by contributing to the knowledge base, providing programs and professional development opportunities and social networking among NODA members. Members find value in networking with each other, sharing knowledge, resources, best practices and research related to the nature of orientation, transition and retention at these specific institution types.

Current Institutional Communities:

- Highly-Selective Institutions
- Large Institutions
- Small College Institutions
- Two-Year Institutions

***Constituency Communities*** are designed to serve a particular constituency (member and/or constituencies members serve on their campuses) and their interests to the NODA leadership, members, and the higher education community. The primary focus of these communities is to help NODA members network with each other.

Current Constituency Communities:

- Gay, Lesbian, Bi-Sexual, Transgender & Allies
- Graduate Student

**Topic-Based Communities** strive to communities best practices, facilitate research, generate new knowledge and provide educational resources specific to a particular topic area which aligns with the mission of the Association. While these groups can generate a peer group around these topics, the primary focus is to expand and contribute to the knowledge base about a specific topic.

Current Topical Knowledge Communities:

- I. Extended-Orientation Programs
- II. International Students
- III. Multicultural Programs
- IV. Non-Traditional Student
- V. Parent and Family Services
- VI. Transfer Student Services

## **Overview and Descriptions of Networks**

### **Nontraditional Student Network**

The Non-Traditional Populations Network is focused on providing education, leadership, and a forum for discussion on behalf of professionals working to improve college student orientation, transition and retention for Non-Traditional Students. The Non-Traditional Student population is vast, diverse, and evolving. It is made up of students identifying as any combination of: part-time, adult learners, returning/re-entry, commuter, and veteran, individuals who work full-time, who have dependents other than a spouse or partner or does not have a high school diploma

### **First-Generation College Student Network**

By definition a First-Generation College Student is one whose parents have not received a college degree from a 2-year or 4-year institute. This category can then be separated into other identifiers which could include various academic and socio-economic factors. The goal is to be able to establish dialogue between the different institutions represented through NODA and share practices, theories and established methods to address this demographic.

### **GLBTA Issues Network**

The mission of the Lesbian, Gay, Bi-sexual, Transgender & Ally Network is to provide an environment within NODA that contributes to the awareness, education, understanding, networking, and advocacy on behalf of the LGBT and Ally membership. The Network provides input to NODA leadership relating to professional development, diversity of

community, and current campus trends which impact the LGBT community, and assists the NODA membership in the educational process on related issues.

### **Graduate Student Network**

The purpose of the Graduate Student Network is to foster graduate student learning and support, as well as to provide opportunities for professional development amongst NODA's graduate student members. This is accomplished through national and regional programs that enhance graduate students' mentor relationships, networking opportunities, resume development

### **Large Institution Network**

The Large Institution Network provides a forum for orientation, transition and retention professionals working at institutions who serve over 3500 freshmen and/or over 1000 transfer students. This network would provide an opportunity to discuss issues and identify the unique academic and social characteristics of large colleges and universities. Network members share and evaluate effective program formats, philosophies and strategies in place at different institutions.

### **Multicultural Network**

The Multicultural Community provides NODA members with opportunities for networking, sharing and providing information on current multicultural issues. This community serves as a coordinating body for promoting, supporting, and exploring multicultural programs and continuing services offered on all college campuses.

### **Parent and Family Network**

The purpose of the Parent and Family Network is to identify and address the unique orientation and transition programming needs of parents and family members of new college and university students and to appropriately develop orientation formats and programs to accommodate parents and family members.

### **Small College Network**

The Small College Network (SCN) provides an inclusive platform for all who have a passion for orientation, transition, and retention at institutions with 5,000 students or less. SCN serves as a community for individuals to connect, disseminate information, advance current research on the unique academic/social characteristics of small institutions, develop best practices, and provide professional growth and leadership opportunities.

### **Transfer Services Network**

The purpose of the Transfer Services Network is to address the specific transition needs of transfer students and provide support and resources to those who plan orientation programs for this unique population.

### **Two-Year Institution Network**

The Two-Year Network serves the needs of NODA members who work in orientation, transition and retention at two-year institutions, including community colleges, junior colleges, and technical institutions. The network helps interested participants remain apprised of current and effective programming formats, trends, and best practices that are applicable to their unique student populations and institutional characteristics. The group engages throughout the year via NODA Connect, online forums, and webinars in addition to educational sessions at regional and national conferences.

### **Extended Orientation Network**

The purpose of the Extended Orientation (EO) Network is to identify and address the unique needs of NODA members working with programs that supplement traditional new student orientation, providing an extension to the orientation and transition process. This network focuses on any program outside of the traditional new student orientation including, but not limited to, spirit/tradition camps, outdoor orientations, and experiential orientation programs.

### **International Student Orientation Network**

The purpose of the International Student Orientation Network is to address the unique orientation, transition, and retention needs of international students. This network will provide support and resources to members as well as create opportunities for collaborating between colleagues at various institutions.

### **Highly Selective Institutions Network**

The purpose of the Highly Selective Institutions Network is to identify the unique academic and social characteristics of colleges and universities who have rigorous academic criteria for admission. These institutions typically serve highly academically talented students who are mostly “traditional” in age and draw from a national and international base. Network members share effective orientation programs and services from their institutions.

## **Educational Programming**

### **Publication Titles and Descriptions**

The publications produced by NODA include but are not limited to:

- ***Empowering Parents of First-Year College Students: A Guide for Success*** is published jointly by the NODA and the National Resource Center for The First-Year Experience and Students in Transition. It offers practical advice on how parents can help their students make a successful transition to college.
- ***A Guide for Families of Commuter Students: Supporting Your Student’s Success*** is published jointly by NODA and the National Resource Center for The First-Year Experience and Students in Transition. It describes the transition to college from the perspective of the commuter student and offers guidance to families on helping students navigate the transition to college and succeed.

- **Journal of College Orientation, Transition, and Retention (JCOTR)** focuses on the trends, practices, research, and development of programs, policies, and activities related to the matriculation, orientation, transition, and retention of college students. Also encouraged are literature reviews, “how-to” articles, innovative initiatives, successful practices, and new ideas. The JCOTR is published through UMN Libraries with open access for all.
- **New Member Online Orientation** is reviewed annually and updated as needed. A history of college orientation, ways to become involved with the Association, and tips on making the most of conferences are included.
- **NODA Databank** is a compilation of survey information from Association schools. Data on orientation, retention, and transition program content and structures, budgets, fees, and staffing patterns are described and analyzed.
- **NODAfications and NODA Review** is the monthly newsletter for NODA members. It includes updates on Association news and services, as well as reminders and deadlines.
- NODA conference/institute/event brochures and materials, newsletters, and associated websites.
- **“Building Successful Foundations: Best Practices in Orientation, Transition and Retention”** is a new publication that offers both the philosophical and the practical perspective for OTR professionals and other practitioners working specifically with students in their first year of college. This publication replaces the Monograph “Designing Successful Transitions: A Guide for Orienting Students to College” and is completely re-written and updated.

### Publication Circulation Timeline

Publication	Published
Building Successful Foundations: Best Practices in OTR	Every 4 years
Journal of College Orientation, Transition, and Retention	Twice per year, digital open access
New Member Online Orientation information	As needed
NODA Databank	Every three – five years
NODAfications	Bi-Weekly
Parent Handbook (original, commuter, and Spanish version)	Based on a date determined in conjunction with the National Resource Center for the First Year Experience and Students in Transition

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## **Publication Distribution and Price List**

### **Distribution**

*New Member Online Orientation, NODA Databank, and NODA Review* will be made available to all Professional members and Graduate Student members. Members must be current in their dues to receive publications.

Publications in Partnership with the National Resource Center for the First Year Experience and Students in Transition are available for purchase.

### **Price List**

Additional copies of select NODA publications may be purchased by NODA members or non-NODA members at prices determined by the Association staff in consultation with the Executive Committee.

### **Educational Sessions**

- No person is allowed to submit more than 10 educational session proposals. This is regardless if they are the primary presenter or if they are 2<sup>nd</sup>/3<sup>rd</sup>/4<sup>th</sup> presenter listed;
- No presenter will be allowed to present more than three educational session proposals during any annual conference.

## **Summary - Specific Recommendations for Regional Conferences**

NODA Regional Conferences serve as a primary educational, connective event in each region of NODA. These conferences provide the opportunity for NODA members to participate in professional and paraprofessional development, to share ideas, to learn new skills and to network with others within the region. With opportunities to present educational sessions, to participate in social, educational and informational activities, NODA members of all experience levels can expect to gain from Regional Conferences.

### **General**

- Regional Conferences are planned under the leadership of the Regional Conference Planning team, with detailed guidance by the NODA Association staff, as outlined in the NODA Bylaws and Standard Operating Procedures.
- Regional Conferences occur in the spring and are intended to be provided in each region each year.
- In the event a Regional Conference Planning team is not identified or able to plan a conference, the Regional Coordinator will confer with the Association Office and Exec Board to guide the region to alternative opportunities.

## **Educational Sessions**

- Conference planners must include sessions within each block that address the needs of professionals in a ratio that mirrors the professional: student attendee ratio.
- Roundtable Conversations
  - Each Regional Conference must have a minimum of two roundtable discussions oriented to professional staff.
  - Roundtable sessions must adhere to guidelines established by the Educational Initiatives committee. These will be established by spring 2019 for implementation in spring 2020.
- Conference planners must ensure a core of educational components by specifically recruiting presentations addressing the following:
  - Current trends in OTR
  - NODA Core Competencies
  - Student Staff development beyond icebreakers
  - Post orientation program opportunities for undergraduate and graduate staff
  - Career opportunities for students entering OTR post-graduation
  - Sessions that provide a clear discussion on application of topic to a variety of programs and institutions

## **Conference Speakers**

- Keynote or featured speakers must be briefed regarding intended audience and expectations for content. Conference planners must ensure all conference attendees' (student and professionals) needs are addressed by speakers either through common goals or multiple speakers.

## **Diversity & Inclusion (addition from the D&I Committee)**

- NODA Regional Conferences are committed to equity, inclusion, and social justice by:
  - Fostering an inclusive environment that welcomes and embraces all attendees and guests.
  - Offering educational sessions, featured speakers, and programs from diverse perspectives and topics.
  - Incorporating networking and community building opportunities to engage and celebrate all members.

## **Additional Features**

- Each regional conference must include:
- An announcement of fundraising for the NODA Excellence Fund (i.e. pin sales, pledges, donations)
- A minimum number of 4 education session timeslots, with enough sessions in each timeslot to
- accommodate all participants.



- Presentation of regional awards as determined by the NODA Standard Operating Procedure Manual, any additional awards that are local to the region need to be approved by Regional Coordinator and NODA Association staff.
- Association required meetings
  - State/province meetings
  - Leadership opportunities session
- At least one casual networking event for each population (students, professional)
- A specific and clear connection to Core Competencies. Implementation will be at the guidance of the NODA Association staff.
- An opening session for all participants that includes greeting from Host, greeting from NODA Association Leadership members (if present).
- Specific and communicated safety plans appropriate for all conference activities. The plans will be developed by the Association Office and shared with conference host and planning team.
- All conference activities must abide by NODA Policies and be directed by the Regional Conference Planning team, in close collaboration with the NODA Association staff.
- An opportunity for Case Study participation (undergraduate student participants, graduate and professional judges and feedback).
  - Judges must be provided with orientation to expectations and type of feedback
  - Regional Coordinators will work with Association Staff to develop standard judging instructions and forms, guidelines for who can be a judge, and sample case studies.
- An opportunity for experienced undergrads to participate in an enhanced learning Returning Orientation Leader Institute (ROLI) type of experience, with graduate and/or professional staff serving as presenters/instructors.

## **Leadership Recognition-Scholarships and Awards Guidelines**

At each annual conference, current and past NODA leadership gather to recognize leadership whose terms are ending. The reception is coordinated by Associate Executive Director in collaboration with the Executive Director and Board President.

Leadership are recognized by the President and presented with an item of recognition for their service:

- NODA leadership chairs, editors, regional coordinators, etc.
- Board of Directors

## **Overview of Awards**

### **Norman K. Russell Scholarship**

The Norman K. Russell Scholarship is to recognize and assist graduate students who have demonstrated a strong commitment to orientation, retention, and transition, and who will contribute to the enhancement of the orientation field, and who are currently enrolled as a

graduate student in orientation-related fields. Up to three \$1,000 scholarships, one of which may be awarded to a doctoral student, will be announced at the Annual Conference. Scholarships are sent through each recipient's financial aid office for distribution of funds.

- NODA may award up to three \$1,000.00 scholarships annually.
- The scholarship selection is to be based on merit only.
- Applicants must be currently enrolled in a Master's program or in Doctoral level studies at the time the scholarship is awarded.
- One letter of recommendation must be from a previous supervisor and/or a faculty member in the graduate student's academic department.
- No individual can receive more than one scholarship in a given year.
- Recipients of the scholarship cannot be considered again.
- Applications shall include optional demographic information of gender and race.

#### **Outstanding New OTR Professional Award**

This award recognizes a new orientation, transition, and retention professional who has demonstrated service to NODA at a regional Association-wide level, and/or to the orientation, transition, and retention profession. This award is granted at both the regional level and the Association-wide level. Each region will select a recipient for the regional award and an Association-wide recipient could be selected from the pool of regional winners each year. The award is based on the following:

- Current NODA membership for one full year.
- No more than 4 years of professional orientation, transition, and retention experience.
- Demonstrated commitment to (and shows promise of becoming a leader in) the field of orientation, transition, and retention.
- Innovative contributions to the individual's institution.
- Active participation at the regional and/or annual NODA conference.

#### **Outstanding OTR Professional Award**

This award recognizes outstanding contributions to NODA and the orientation, transition, and retention profession. This award is granted at both the regional level and at the Association wide level. Each region will select a recipient for the regional award and an Association wide recipient could be selected from the pool of regional winners each year. The award is based on the following:

- Outstanding contributions to the orientation, transition, and retention profession (e.g. research, publications, presentations, etc.)
- Development or enhancement of a model orientation, transition, and retention program that meets the varied needs of students.
- Current NODA membership.
- Outstanding regional or Association-wide leadership.

- Eight or more years of professional orientation, transition, and retention experience (graduate work not considered).

### **Presidential Recognition Award**

The Presidential Recognition Award is given annually (at the discretion of the Association Presidents) to an individual or organization to honor outstanding commitment and support to the advancement of the mission of the Association.

A paper weight will be presented to the individual receiving recognition along with their name inscribed on the NODA Wall of Honor on the official NODA website (nodaweb.org)

### **Outstanding Student Leadership Award**

This award will recognize student leaders for their contributions to their campus orientation, transition, and retention program, staff success, creativity and outstanding abilities. The award will be presented to one graduate student and one undergraduate student.

### **Outstanding NODA Intern Award**

This award recognizes one intern who has demonstrated commitment to learning and professional development and service through the successful completion of a NODA internship experience.

Award recipient:

- Must have served in an internship sanctioned by NODA within the 12 months prior to the conference in which the award is given, lasting a minimum of eight weeks.
- Must be placed into nomination by the host and/or direct supervisor in the internship.
- Each nomination must be accompanied by two (2) letters of recommendation; one from the direct supervisor and the other from an additional internship campus representative.
- Internship experience must be with a different institution and not the student's current institution.
- Recipients must be either:
  - Enrolled in a graduate program or
  - Have graduated from a graduate program no more than 12 months prior to the conference in which the award is given.

### **Outstanding Mentor Award**

This award is designed to give special recognition to those professionals who provide outstanding mentorship and guidance to graduate students who aid in orientation and transition programs within our Association and on your campus. In order to be considered, the nominee must be a current NODA member and have been involved in orientation, transition or retention programs within a year of the September before the Annual Conference.

### **Outstanding Research Award**

Purpose: To emphasize and celebrate the importance of research in the fields of orientation, transition and retention, NODA has an established research award. Graduate students are eligible for a \$1,000 award plus a waiver of the Annual Conference fee for the upcoming year (including the membership fee) in recognition of excellence in research and contributions to scholarly pursuits.

Eligibility: The Outstanding Research Award is tenable by graduate students who are enrolled in graduate studies and in the process of completing a graduate thesis or dissertation or who have completed their degree requirements within one year prior to the annual fall conference at which the award will be bestowed. The scholarly research honored should highlight topics within the field of orientation, retention and transition. Award recipients will be invited to present their thesis or dissertation topic at the NODA Annual Conference as well as be invited to submit the completed study in manuscript format for possible publication, in part or in full, in the JCOTR.

Policies: As the Outstanding Research Award will serve to promote and contribute to NODA's goal of scholarly research and publication in the area of orientation and student transition, the award is to be bestowed to one outstanding thesis or dissertation projects each year.

The Outstanding Research Award is reviewed and selected by the NODA Scholarly Practices & Committee.

The amount of \$1,000.00 plus a waiver of an Annual Conference registration fee shall be budgeted and allocated for the NODA Outstanding Research Awards. This waiver shall apply to the Annual Conference immediately following the receipt of the award.

### **Innovative Program Award**

The Innovative Program Award is presented annually by NODA to a program or unique approach to a challenging situation and/or specific campus concern or need. It is the goal of NODA to recognize leaders and generate new knowledge within the field of orientation, transition and retention. This award seeks to recognize innovative and effective approaches that help university officials meet the changing needs on college and university campuses. It is also an opportunity to highlight good administrative and other practices and share different approaches to meeting student needs with colleagues at other institutions. This award is granted at both the regional level and at the Association wide level. Each region will select a recipient for the regional award and an Association wide recipient could be selected from the pool of regional winners each year.

An innovative program should:

- Encourage diverse and/or multiple subgroups to participate;
- Address a demonstrated need on campus;
- Contain an evaluation/assessment component;

- Are adaptable to other institutions
- Demonstrate financial creativity or cost effectiveness;
- Involve collaboration with other college or university departments; and
- Enhance student learning.

The selection criteria for the Innovative Program Award are as follows:

- Description of the challenging situation and/or specific campus concern/need;
- Explanation of how the program addressed the identified concern/need;
- Evaluation of the program including suggestions as to how the program could be modified to become more effective;
- Description of how the program could be implemented on other campuses.

Nominations should include the following:

- Cover letter from the submitting nominator;
- Information about the individuals responsible for the innovative program; and
- Other supporting documents detailing the creation and implementation of the program.

Only one nomination will be considered from each college, university and/or regional campus.

## **Resolving Conflict of Interest in the Nomination Process**

In the event that the Committee Chair is nominated for an award, s/he will respectfully decline.

- If committee members are nominated, they will have the option of respectfully declining or stepping down from the committee for that selection year.
- In the case that the committee member chooses to step down from the committee and the committee is left with an even number of members, the President will reappoint an additional member to restore the committee to an odd number of members.
- Committee chair and members will refrain from participating in the nomination process.

## **Orientation, Transition and Retention (OTR) Catalyst Grant**

The OTR Catalyst Grant is designed to catalyze new research that will advance both knowledge and best practices in orientation, transition, and retention. Prospective research studies, pilot studies, exploratory research projects (qualitative and quantitative), as well as assessment-based best practices (as defined by Upcraft and Shuch, 2002) that may be generalized will be considered for this award. Up to six catalyst grants (two \$1,000 grants and four \$500 grants) will be awarded to emerging OTR research. All grant recipients will also receive registration fee for one annual NODA Conference or regional conference and a year's membership to the association. Grant funds may be used to support professional development, researcher(s) stipend, and project expenses.

Prospective grant recipients must **electronically submit applications by (typically the end of January)**. Grant recipients will be notified by (typically end of March), given priority consideration for educational session presentation at the annual NODA Conference, and recognized during the annual conference. Recipients will also be asked to submit a manuscript about the selected research to the NODA Review, *Journal of College Orientation, Transition, and Retention (JCOTR)*, or submit a conference proposal for a regional NODA conference or NODAC within one year of receipt of the grant.

**Grant applications should include the following:**

A **cover page** identifying the research proposal title, the primary investigator’s name, address, institution, telephone number, and email address; and the names of any research team members.

A **description of the research** proposal (maximum of 3 pages, double-spaced and not including resources; brevity is appreciated), which should include all of the following:

- Statement of purpose of the research
- Brief description of literature review addressing the questions of why this research is important
- Description of the population and/or practice or program to be studied
- Description of any instrument(s) to be used in the study
- Description of the procedure
- Description of the proposed analysis
- Description of the audience for whom the research would be of interest
- Description of the credentials of the researcher(s)
- Information about any other funding sources for which you have used this project to apply

Reviewers will evaluate applications on the following criteria: (1) Originality and creativity; (2) Response to current trends and issues in OTR research and practice; (3) Clarity, value, understanding of student development and learning outcomes; (4) Application of theory to practice; (5) Writing style and degree to which it is based on research literature and theory; (6) Research design; and (7) Relevance.

Research grant proposals should be submitted electronically as an email attachment XX, Chair, NODA Scholarly Practices & Resources at \_\_\_\_\_ by \_\_\_\_\_. ***Please send as a Word document with the title of your grant proposal as the name of the document.***

**OTR Catalyst Grant Rubric**

The Following are items that must be included with the Catalyst Grant Application. An application should be considered *ineligible* if any of the following items are not included.

Primary Investigator	
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Researcher 2	
Researcher 3	

	Included	Not Included
Statement of Purpose of the Research		
Brief description of literature review addressing the questions of why this research is important		
Description of the population and/or practice or program to be studied		
Description of any instrument(s) to be used in the study		
Description of the procedure		
Description of the proposed analysis		
Description of the audience for whom the research would be of interest		
Description of the credentials of the researcher(s)		
Information about any other funding sources for which you have used this project to apply		
<b>Is this application eligible?</b>	Yes	No
<b>As described, does the project have the potential to be innovative?</b>	Yes	No
<b>Total Points from Rubric</b>		
<b>Applicant Rank (compared to peers) Based on Total Score from the Rubric</b>		

Additional Comments (internal only):

	<b>1 –Does Not Meet Expectations</b>	<b>3 – Meets Expectations</b>	<b>5 - Exceeds Expectations</b>	<b>Score And Comments</b>
<b>Originality &amp; Creativity</b>	Duplicates Current Research	Request continues the work of establish research, in a logical direction	Brings research in a new direction	
<b>Response to Current Trends &amp; Issues in OTR</b>	Proposal does not respond to current trends	Proposal responds, to some extent, to current	Proposal is well written and responds to	

<b>Research &amp; Practice</b>	and issues in OTR research and practice (i.e., investigates an area that has been previously investigated, etc.)	trends and issues in OTR research practice	more than one current trend or issue in OTR practice; well-grounded in prior research, but clearly contributes to and/or fills the gap in existing OTR research	
<b>Clarity, Value, Understanding of Student Development and Learning Outcomes</b>	Proposal lacks integration of student development theory and learning outcomes in a meaningful and substantive way	Proposal utilizes student development theory and learning outcomes in a functional and typical manner. Little to no innovation.	Student development theory and learning outcomes foundation for the proposed research study. Study extends the knowledge base	
<b>Application of Theory to Practice</b>	Proposal does not demonstrate an application of theory to OTR practice	Proposal demonstrates some application of theory to OTR practice	Proposal demonstrates a strong application of theory to OTR practice	
<b>Writing Style and Degree to which it is Based on Research Literature and Theory</b>	Proposal is devoid of significant reference to relevant and appropriate research literature and theory.	Proposal includes the minimum level of research literature and theory necessary to conduct the study.	Research study integrates a comprehensive review of the literature in a pithy and discerning fashion.	
<b>Research Design</b>	Design will not stand up to academic rigor OR is not	Design will have limited scope, but considered sufficient OR is there is some questions to some details of design	Design is considered extremely strong and generalizable	



	discussed in proposal		AND is well articulated in the proposal	
<b>Relevance</b>	Proposal is not relevant to current OTR research and practice	Proposal demonstrates some relevance to OTR research and practice	Proposal demonstrates, through the use of multiple examples, strong relevance to current and future OTR research and practice	

Comments to be returned to the applicant(s):	
Are there other NODA funding opportunities that are more appropriate for this proposal?	

**Catalyst Grant Payments**

The Scholarly Practices & Resources Committee reviews and selects the NODA Catalyst Grant winners and requests the grantees complete the below Catalyst Grant Acceptance Form.

**Catalyst Grant Acceptance Form**

Congratulations on your NODA Catalyst Grant award. We are excited to see what your investigation finds. Please complete and submit this document to the NODA Association Office no later than (Enter Date Here). This document can be faxed, mailed, or emailed to the office. Please see below for contact information.

Primary Investigator			
Title			
Institution			
Email		Phone	

**Other Investigator(s) if applicable**

Investigator	
Title	

Institution			
Email		Phone	

**If NODA has any questions during this process, whom should we contact?**

Primary NODA Contact	
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**Award**

**To whom should we send this award?**

Name					
Address Line 1					
Address Line 2					
Address Line 3					
City		State/Province		Zip Code	

*Grant recipients are given priority consideration for an educational session presentation at the annual NODA Conference, and recognition during the annual conference. Recipients must submit a manuscript about the selected research to the NODA Review, Journal of College Orientation, Transition, and Retention (JCOTR), or submit a conference proposal for a regional NODA conference or the annual NODA conference within one year of receipt of the grant. Publication and/or conference proposal acceptance are not guaranteed.*

**Based on the statement above, how do you anticipate you will fulfill your obligation to communicate your findings to NODA? This is not committing you to this medium.**

**What is your anticipated timeline of this investigation?**

We understand that your investigation will have its own unique life cycle. We will use the information stated here to build a reporting structure so that we can ensure that this research is progressing at a reasonable pace.

Once received by the NODA Association Office, we will be in contact to coordinate an appropriate reporting schedule.

Please use as many of the following Milestone fields as you need.

Milestone 1	
Anticipated completion date	
Comments about this Milestone	

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Milestone 2	
Anticipated completion date	
Comments about this Milestone	

The Scholarly Practices & Resources Committee Reviews the Acceptance Form and approves the milestones. Once this takes place, the Association Office sends the award letter with payment.

### **Travel Policy**

NODA leadership is expected to act in a fiscally responsible and ethical manner in regards to NODA expenses. This includes being fiscally resourceful, making all efforts to stay within the budgeted amounts and reflecting a “NODA pays for NODA” philosophy.

Below is a list of items that are typically NODA expenditures:

#### *Executive Retreats*

- Travel costs (airfare, mileage reimbursement, parking, shuttle, etc)
- Meals during the retreat on travel days
- Hotel room and taxes incurred for allotted retreat days (volunteers will share rooms as appropriate)

#### *Board of Director Meetings (fall and spring meetings)*

- Continental breakfast is served at each in-person board meeting
  - The Board allocated additional funds (\$1,500) to cover meals at meetings.
- \*Note: these funds are only allocated if the budget allows.

#### *Board Recognition*

- If a board member does not have institutional financial support to attend board meetings, the association will reimburse up to \$250 per fiscal year for travel expenses that may include transportation and hotel.
- Board members would be eligible to apply for up to \$750 NEF funding under the leadership category.

#### *NODA Reception at NASPA*

NODA will cover the cost of one volunteer leader to attend the NASPA Annual Conference. The President will determine who will represent the Association at his/her discretion. The Executive

Director will also attend the NASPA Annual Conference and coordinate the logistics of the NODA Reception. The funds in the reception should not exceed \$1200.

### **General Guidelines for Travel and Reimbursement**

- Travel will be reimbursed for the least expensive mode of reasonable transportation
- Plane tickets must be coach/economy class on the least expensive major airline
- Airport parking or transportation to and from the airport is reimbursed. Taxi/shuttle (including tips), between the airport and hotel will be reimbursed
- Baggage fees will be reimbursed, however travelers are encouraged to carry on bags whenever possible
- Ground mileage is reimbursed at the approved IRS standard business mileage reimbursement rate
- Reimbursement requests must be sent to the NODA Association office using the appropriate travel form accompanied with all receipts and within 30 days of travel

### **Financial Procedures**

The Finance Committee and Board of Directors begin to determine funding needs based on strategic priorities at the fall Board meeting. Funding requests should be sent to the Executive Director by the end of December/early January of each year. The Association budget will be presented to the Board of Directors for approval at the spring Board meeting.

As part of the development of the Association budget, a Merit Pool of funds will be included in the annual budget based on guidelines by the University of Minnesota, Twin Cities. Any staff salary increase is at the discretion of the Executive Director and will be included in the annual budget for approval. The Personal Committee determines annual salary increases for the Executive Director.

As part of NODA’s succession planning, the NODA Treasurer will have access to the financial accounts for the Association. These accounts include: investments through Fidelity and the savings and checking accounts at US Bank.

### **Cancellation Processing Fee & Deadline Schedule**

The following processing fees will be charged for canceled event registrations.

<b>Event Rate</b>	<b>Fee</b>
< \$100	\$10
\$100 - \$249	\$25
\$250 - \$399	\$50

\$400 +	\$100
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The cancellation deadline without refund is determined based on the modality of the event. All deadlines will be 5:00 p.m. central time. If the deadline falls on a non-business day the deadline will be extended to the next business day at 5:00 p.m. central time.

Modality	Deadline
In-Person Events	21 days before the start of the event
Virtual Programs	14 days before the start of the event

### *Exemptions*

Exemptions to the cancellation policy may be granted by the Executive Director, or their designee, when extenuating circumstances exist or granting the exemption serves the best interest of the Association.

### *Standard Cancellation Language*

If you need to cancel a registration, please email [noda@umn.edu](mailto:noda@umn.edu) with the specifics of your cancellation request.

All registration cancellations received by the NODA Association Office in writing before 5 p.m. CST, \_\_\_\_\_ days before the start of the event will be honored and processed within 30 working days. Event cancellation will be assessed a \$ \_\_\_\_\_ processing fee per registration, and the amount refunded will reflect that fee. Cancellations received after the 5pm deadline will not receive a refund as a result of costs incurred to the Association. In addition when bulk discount pricing is applied, cancellations which result in lower than the required number of registrants to receive the bulk pricing rate will result in the loss of the discount and the entire invoice be adjusted accordingly.

You are considered registered for the NODA event if you complete the registration, regardless of payment status. Refunds will not be granted for no-shows. You are considered a no-show if you either do not show for the event, and/or have not notified NODA of your cancellation. You will be held accountable for the cost of your registration if you are registered, even if you are a no-show and have not paid. NODA cannot accept refund requests that result from natural disasters, travel disruptions, illness, technology malfunctions, or other uncontrollable events.

Members assume responsibility for notification and verification of receipt by NODA. By registering for this event, you acknowledge agreement to the policy stated above as well as consent to NODA's use of photos taken during the event.

## **NODA Fiscal Year Budget Planning Schedule (July 1 - Start of the NODA Fiscal Year)**

### **Summer**

- Update on current Budget provided to Board of Directors
- Discussions begin at Finance Committee regarding forecasting for next Fiscal Year

- Previous Fiscal Year Budget finalized with a review by the Finance Committee

### **Fall**

- Finance Committee and Executive Director plan for Board of Directors meeting where budget priorities will be set
- Finance Committee leads discuss the sets budget priorities at the Board of Directors Meeting
- Budget Requests for Next Fiscal Year are submitted to NODA Executive Director
- 1<sup>st</sup> Quarter review of current Fiscal Year Budget conducted by Finance Committee
- Finance Committee and Executive Director review budget requests

### **Winter**

- Feedback given on Budget Requests, if needed, and budget requests are re-submitted as needed
- Finance Committee works with Executive Director to formulation the budget for the next Fiscal Year
- Finance Committee conducts a mid-year budget review
- Finance Committee and Executive Director finalize next Fiscal Year's budget and prepare for Board of Directors Meeting

### **Spring**

- Budget for next Fiscal Year is presented to and accepted or denied by the Board of Directors
- Budget for next Fiscal Year is re-worked and re-presented to Board of Directors if necessary
- 3<sup>rd</sup> Quarter review of current Fiscal Year Budget conducted by Finance Committee

### **Conference Registration Fee Structure**

The conference registration fee should be reduced to cover consumable fees as determined by the Association staff for the Annual Conference Program Committee. In addition, the conference registration fee should be waived for the Annual Conference Program Chair.

### **Fee Schedule for Annual Conferences & Institutes, Symposium & Summits Connected to the Annual Conference**

- **Early Bird Rate** = Regular conference registration fee as established by the Association Staff
- **Regular Rate** = Regular conference registration fee (Early Bird) plus \$75
- **Late-Fee Rate** = Regular conference registration fee plus \$50

The rate fee timeline will be determined by the Association Staff. An annual increase of \$5 will be built into the revenue projections for registration fees in the conference budget.

### **Fee Schedule for Regional Conferences, Institutes, Symposiums & Summits**

- **Early Bird Rate** = The conference registration fee as established/approved by the Association Staff from the point of registration through 4 weeks prior to the conference.

- **Regular Rate** = The conference registration fee (Early Bird) plus \$25 from 27 days before conference to 2 weeks before the conference.
- **Late-Fee Rate** = The conference registration fee (Early Bird), plus \$50 from 13 days prior to the conference through 2 days before the conference.

The applicable registration rate for a conference participant is determined by day that online payment was made or payment is postmarked to the Association Office.

\$250 is budgeted each fiscal year for each region to be used for the Regional Coordinator Fund, and can be used through the strategic priorities line of the budget as needed.

Attendees who do not pay by the first day of the conference or are unable to provide proof that they have submitted a request for payment to their accounting office will be assessed a late fee. The late fee is \$50 for Regional Conferences and \$100 for Annual Conference, per registrant. After two months of delinquent payments and no proof of payment request, payments will be sent to collections.

## Member Rates

### Institutional Purchasing

IPEDS Classification	Rate
<b>Two-year</b>	
very small	\$ 325.00
small	\$ 350.00
medium	\$ 475.00
large	\$ 500.00
very large	\$ 525.00
<b>Four-year</b>	
very small	\$ 350.00
small	\$ 550.00
medium	\$ 950.00
large	\$ 1,200.00
Non-IPEDS Classification	Rate
International	\$ 350.00
Professional School	\$ 350.00
System Office /Other	\$ 350.00

### Individual Purchasing

<b>Professional</b>	\$360
<b>Graduate</b>	\$45
<b>Transitional Professional</b>	\$50

### Professional Non-Member Rates

- Annual Conference member rate + NODA membership fee + \$30

- Regional Conference member rate +the NODA membership fee + \$10
- Drive-In Conference/Regional Pre-Conference member rate + \$20
- Pre-Conference Sessions at Annual Conference member rate + \$100
- Webinars member rate + \$99
- Institutes, Symposiums & Summits member rate + NODA membership fee + \$10

These rates would apply to non-member professionals only. Undergraduates do not have to be members currently so their rate would not change (just conference fee and optional membership fee). Graduate students and Associate members will not be offered a non-member rate.

**International Rates**

NODA will accept payments or make payments in US Dollars only. The exchange rate used for international funds or services rendered outside of the United States, will reflect the exchange rate in place on the date of the event/transaction. NODA will make international payments with a check only.

**Institute/Symposium Pricing Guidelines**

*Note: While Extended Orientation Institute uses the institute designation, it should be priced using the Regional Conference pricing procedures.*

The following variables will be taken into consideration when pricing a program:

- **Estimated Supplies & Expenses (S&E) costs:** technology, meals, office supplies, etc
- **Estimated Attendance:** A good faith estimate of the number of participants (or participant teams) based on current demand. This may be different from the max capacity of the event.
- **Faculty Compensation:** Honorariums given to faculty leading the program. This does not include reimbursements for travel, lodging, and/or meals. These items should be included in S&E. In addition, nominal items of appreciation should be included in S&E.
- **NODA Base Rate:** All NODA events will have a per person base return rate based on the primary audience outlined below.

	Student	Entry Level	Mid Level	Senior Level
<b>NODA Base Rate</b>	\$40	\$75	\$100	\$125

**NODA Surcharge:** A 15% surcharge will be added to the total cost per person to help cover overages and low attendance.

The Association staff will use the following formula to calculate the minimum rate charge.  
 minimum rate = NODA Base Rate +S&E + Faculty Comp / Est Attendance 1.15

Rates will be rounded up to the nearest multiple of 5. A [worksheet](#) has been set up on the NODA shared drive to assist in the calculation process. The Association staff will set the program fee at or above the minimum rate. Exceeding the minimum rate should only be done when previous demand demonstrates the market will bear a higher rate while maintaining desired attendance numbers.



## Rate Structure

**Early Bird Rate** Minimum Rate

**Regular Rate** 115% Early Bird Rate (rounded up to the nearest multiple of 5)

**Late Rate** 125% Regular Rate (rounded up to the nearest multiple of 5)

## Social Media Policy

Social Media are powerful communications tools that have a significant impact on organizational and professional reputations. Because they blur the lines between personal voice and Association voice, NODA has crafted the following policy for the appropriate use of Social Media by association members, to ensure that these systems are used in an appropriate, productive and lawful manner in accordance with all other NODA policies.

Social Media sites have been established as professional resources for NODA members (and non-members) with the intent of facilitating Association business and networking among students, professionals and private business associated with the orientation, transition and retention of students in higher education. Examples include but are not limited to LinkedIn, Twitter, Facebook, YouTube, and Association related blogs.

Additionally, as with any conduct outside of NODA, staff, leadership and volunteers can be held accountable for conduct that negatively impacts NODA's core mission. This includes Social Media activities where members misrepresent themselves as volunteers or staff of the Association, inappropriately share information related to Association business, and/or post inappropriate statements/videos which may negatively impact the Association.

### Terms Defined

**Association Business:** For the purposes of this policy, all future references to Association Business shall refer to the regions, networks, committees, conferences, webinars, electronic and print publications, meetings and business related functions in each of these areas.

**Social Media:** Social Media is the use of web-based and mobile technologies to turn communication into interactive dialogue. Examples include, but are not limited to, web logs (blogs), internet chat rooms, online forums, social networking sites (Twitter, Facebook, LinkedIn, etc.), video sharing (YouTube), and all related technology that will be developed in the future.

**The NODA Brand:** Official Social Media sites related to, and maintained by, the Association Office.

### Policy Oversight

The Executive Director, or appointed designee, is responsible for overseeing the implementation of this policy. They will review all violations of this policy, including: (a) failure to represent the

Association in a professional and responsible manner; (b) failure to comply with the disclosure process; and (c) failure to comply with the best practices outlined in this document.

Any member of the Association may report a violation of this policy their elected Regional Coordinator, a member of the Board of Directors, or the Executive Director of the Association. Possible penalties for violating this policy include posted retraction of concerned content, public apology, or removal from elected or appointed positions (by majority vote of the Executive Board of the Association).

### **Policies for Social Media Sites**

The following is a list of uses that are inappropriate when officially representing the Association with NODA's name or likeness. When using Social Media that is accessible to others, elected or appointed leadership, volunteers and members may not engage in the following:

- Acting as a representative of the Association or acting in a way that would infer that one is acting for and on behalf of NODA when not authorized to do so (e.g., contacting the media or government officials, responding to complaints or questions about NODA business, etc.)
- Recording sound, pictures, or video of meetings, presentations or association activities without appropriate authorization/consent from participants.
- Inappropriately sharing confidential information related to Association business, such as personnel actions, internal investigations, or member information.
- Violating copyright/fair use policies and/or the Terms of Service of any Social Media platform employed.
- Violating NODA visual standards as presented in the *NODA Publications & Style Manual*. (A copy of this manual can be found on the NODA website at: [www.nodaweb.org](http://www.nodaweb.org).)
- Supporting or opposing a candidate for public office. This does not include authorized lobbying efforts for causes aligned with NODA's core mission.
- Accessing, sending, or soliciting messages or images that are sexually oriented, depict graphic violence, or which may offend or harass on the basis of race, color, age, marital status, sex, gender identity and/or gender expression, religion, national origin, ancestry, sexual/affectional orientation, disability, or veteran status, consistent with the NODA Non-Discrimination Statement.
- Using Social Media in ways that negatively affect productivity or otherwise cause distractions to the individual, his or her co-workers, and host institutions, otherwise known as "cyber slacking." University computers and time on the job are reserved for university related business as approved by your supervisor and in accordance with the policies of your institution.
- Unprofessional communication that negatively impacts NODA's reputation, interferes with NODA's core mission, or slanders members of the Association.
- Forwarding electronic or confidential messages without permission from the originator.
- Using Social Media designed for Association business for non-business-related personal requests.

Each individual utilizing one of these technologies is responsible for knowing the Association's expectations for appropriate use of Social Media as it relates to Association business.

### **Social Media Used for Association Business**

If you use Social Media for Association business, the following policies apply:

- **Notify the Association.** Regions or regional conference planning groups that intend to utilize Social Media should contact, and obtain approval from, their Regional Coordinator. Association committees, networks or annual conference planning groups that intend to utilize Social Media should contact, and obtain approval from, the Association Office.
- **Identify a site host or moderator.** All association pages must have a dedicated volunteer who is identified as being responsible for the official content posted in their environment.
- **Acknowledge who you are.** If you are representing NODA when posting on a Social Media platform, acknowledge this. Profiles should indicate who is responsible for updating/posting information on the site.
- **Develop a plan.** NODA and volunteer leadership should consider their messages, audiences, and goals, as well as a strategy for keeping information on Social Media sites up-to-date.
- **Protect the Association voice.** Posts on Social Media sites should protect the Association's voice by remaining professional in tone and in good taste. No committee, network, region or individual member should construe its Social Media site as representing the Association as a whole.
- **Protect the visual identity of the Association.** Consider this when naming pages or accounts, selecting a profile picture or icon, and selecting content to post—names and profile images should all be clearly linked to the particular region, network, committee or conference rather than the Association as a whole.
- **Transfer access.** Upon completion of the elected/appointed term of service, access to Social Media sites where members served as hosts/moderators should transition to the newly elected/appointed individual.

### **Social Media Visual Standards**

The NODA name, logo, mission, or any other information owned by the Association should reflect the standards established in the NODA Publications & Style Manual (March 2010) and not be posted on Social Media related to Association business without permission of the Board of Directors.

Logos for Regional Conferences and other business related to the region should be approved by the Regional Coordinators. Logos for Annual Conferences and other Association business should be approved by the Executive Director. All logos should reflect the professionalism and integrity of the Association.

## Best Practices for Social Media Presence

The following best practices are intended for those utilizing Social Media for Association business. Individual members of the Association are also encouraged to employ these best practices in their own Social Media use.

**Be respectful.** Anything you post in your role as a member of NODA reflects on the association. Be professional and respectful at all times on your Social Media site. Avoid citing or referencing members, partners, etc. without their approval. Remember that NODA is an international association whose members reflect a diverse set of customs, values and points of view. Do not use derogatory language, obscenity, or engage in any conduct that would not reflect well on NODA.

**Be transparent.** Make it clear that you are utilizing Social Media in your role as a member, volunteer or leader of the association. One of the great benefits of Social Media is that the individuals maintaining Social Media sites personalize large and complex associations like NODA. If you identify yourself as a member of the Association online, it should be clear that the views expressed are not necessarily those of the Association.

**Listen.** Being a consumer of Social Media is essential to your ability to be a successful producer of Social Media content. “Listen” to online conversations on your preferred tools – be they blogs, Twitter, Facebook or anything else – to maintain a clear and current understanding of what is relevant and of interest to the community.

**Be active.** A Social Media presence requires diligent care and feeding. If you do not have the time or resources to check in on these sites at least a few minutes each day, and to post fresh content several times a week, reconsider jumping in to Social Media at this time. Your site is only as interesting as your last post – if that post is several months old, visitors will consider it mothballed.

**Be timely.** One of the great benefits of Social Media is the ability to share information almost instantly with a global audience. This timeliness is also one of the expectations of that audience. Be prepared to move quickly in response to new developments, announcements, or emergencies with relevant information on your site. A short amount of accurate information delivered at the time of need can sometimes be more valuable than a full report delivered well after the issue has passed.

**Think twice before you post.** Privacy does not exist in the world of Social Media. Consider what could happen if a post becomes widely known and how that may reflect both on the poster and the Association. Search engines can turn up posts years after they are created, and comments can be forwarded or copied. If you wouldn't say it at a conference or to a member of the media, consider whether you should post it online.

**Participate and engage.** As a consumer as well as a producer of Social Media, offer comments on interesting posts and share the good work of others using your sites. Social Media is not

(only) about sharing your news and success, it's about sharing information that is of interest to your readers and viewers.

**Accept and monitor comments.** A Social Media site without comments isn't very social. Be prepared to accept and respond to comments. To protect your site, moderate all comments before posting. Understand that not all comments will be positive, and respond to negative comments professionally and by providing any additional information that may help resolve the issue. Post a disclaimer on your site stating you reserve the right to remove inappropriate comments. Remove those comments containing vulgar language, those that attack any one group or individual and those that are obviously spam.

**Be a valued community member.** Don't just talk about your program or department – share the best information you find from trusted sources outside of NODA. This will increase the value of your site and also will ensure you are a valued member of the community.

**Try to add value.** Provide worthwhile information and perspective. NODA is best represented by its engaged members and volunteers and what you post may reflect on this. What you post should be thought-provoking and/or build a sense of community.

**Strive for accuracy.** Get the facts right before posting them on Social Media. Review content for grammatical and spelling errors. This is especially important if posting on behalf of the Association in any capacity. If you make an error, be up front about your mistake and correct it quickly. If you modify a post, make it clear you have done so.

**Logout.** Always remember to log out when finished using/updating a Social Media site.

## **Monitoring**

For those Social Media technologies associated with the NODA brand, designated staff members or volunteers will be charged with monitoring these sites according to prescribed guidelines and expectations developed by the Executive Director and/or Board of Directors.

All Social Media sites related to the NODA brand and Association business should be monitored regularly for postings or comments by those persons officially designated by the Association. Any inappropriate postings or comments should be removed immediately by a host or moderator. Issues involving repeat offenses will be referred to the Executive Director.

Reports will be responded to as they are brought to the attention of the Association Office. The Executive Director and Association Staff will regularly monitor Social Media related to Association business or its individual members.

## **Directory Information**

Only NODA Professional and student members have access to the online membership directory. The following is listed as part of the online membership directory: name, title, institution, institution email, office phone, and membership type. We do not share personal demographics,

personal email or cell phone numbers. Members have the option to edit what information is shared by managing their profile through the NODA website.

### **Membership/Leadership Status**

If you are holding a leadership positions your name, institution, and email will be listed on the NODA materials.

### **Information Shared**

NODA may, at its discretion, provide membership information collected on the membership registration/renewal form to association leadership (such as committees, state, provincial, or regional leaders) for the sole purpose of conducting official NODA business.

### **Mailing Lists**

NODA does not sell electronic mailing lists to members and non-members. Certain member information is shared with Associate Members in accordance with the Associate Member and/or sponsorship agreement. These mailing lists include name, title, institution and institution mailing address. Through the NODA website members have the option to not share their contact information with Associate Members and vendors.

### **Third Parties**

NODA contracts with third party vendors to assist in the delivery of service to the membership. These third party vendors maintain a strict and separate set of privacy guidelines. NODA only shares information necessary to provide the service requested.

### **Cookies**

Like many other websites, NODA uses cookies to identify members so they don't have to re-enter a user id and password when accessing different components of the website and engaging in online community. If you do not have cookies enabled, you must enter your password each time you access our site or any of its member features.

### **Conference/Program Registration Information**

Information received for conference or other program registrations will be used strictly for conference planning and accommodating purposes. Exhibitors at the annual conference are provided the email of conference participants to use once.

### **Credit Card Information**

NODA is committed to making our best effort to ensure payment information remains private. Our online payment system is encrypted and uses the https security protocol. Credit card information is not stored at the association office.

### **Questions**

If you wish to change any information you have given to the association or have any questions regarding our Privacy Statement of Practice, you can contact us at [noda@umn.edu](mailto:noda@umn.edu).

## **Guidelines for the Development of Strategic and Educational Partnerships**

*These guidelines are intended to ensure that all strategic partnerships are consistent with NODA's stated mission and core values:*

The mission of the NODA is to provide education, leadership and professional development in the fields of college student orientation, transition and retention.

***Core Values: Community, Diversity, Integrity, Learning, Scholarship, and Service***

### **I. Definition of Strategic Partnership**

At times, the NODA Board of Directors may find it beneficial to the Association to enter into discrete partnerships with corporations, vendors, or other business organizations. These strategic partnerships should only be entered into if they advance the goals of the Association, provide a financial benefit to the Association, or further position the Association as a professional organization. The Executive Director may explore and negotiate potential partnerships and submit a proposal to be reviewed by the Executive Committee.

The Executive Director may propose educational partnerships that will benefit all of the Association's membership, members in specific regions, or other subsets of the membership. Educational partnerships should benefit the widest range of NODA members, possible, including those unable to participate in regional and annual conferences.

The decisions to enter into each partnership must be fully grounded in the mission of NODA, the Statement of Professional Ethics, and the core values of the Association with the best interests of the Membership kept foremost in the decision-making process. These educational partnership agreements should facilitate NODA's efforts to support the role orientation, transition and retention play in the lives of new students and/or their families.

### **II. Proposal Guidelines and Format**

NODA will assess every proposal for strategic partnership based upon the following guiding principles. It is expected that these principles will be addressed in all written agreements:

- Only proposals for programs, events, and/or services that NODA considers central to its mission will be considered.
- Programs must be inclusive and must not discriminate in accordance with NODA's Nondiscriminatory Statement.
- Preference will be given to proposals that provide services and/or benefits to the membership and/or positively impacts the recruitment or retention of NODA members.
- The use of the NODA name, logo, and/or other images is prohibited unless explicitly outlined in the approved agreement.
- Any change, regardless of cause, to a partnership agreement is subject to NODA review and approval. All changes must be reflected in writing prior to implementation.

NODA reserves the right to cancel any partnership agreement that it believes compromises the reputation or integrity of the Association or its members, or where it determines that the strategic partner is not in compliance with the terms of the partnership agreement.

All proposals must include the following to be considered:

1. Submitted on the Educational Partnership Proposal, highlighting the following information:
  - a. Name of association/organization requesting partnership
  - b. Educational benefits of partnering for NODA
  - c. Additional advantages to NODA
  - d. Additional advantages to prospective educational partner
2. To be considered for an educational partnership, a minimum of one of the following requirements must be identified in the Educational Partnership Proposal. The Educational Partnership may include more than one of the following minimum requirements if so desired:
  - a. Co-presentation of session at conferences
  - b. Presentation exchange at conferences
  - c. Co-presentation of regional drive-ins/meet-ups
  - d. Co-presentation of webinars
3. Additional items that may be included in an Educational Partnership, but are not required, could include, but not be limited to, the following:
  - a. Conference fee waiver for conference delegates from partner organizations at the discretion of the Executive Director
  - b. Exhibit exchange at conferences
  - c. Advertisement exchange in publications
  - d. Newsletter exchange
  - e. Link on web page to resources
  - f. Co-host reception at conferences
  - g. Fund program initiative
  - h. Other

### **III. Responsibility and Expectations of Strategic Partners**

For-profit strategic partners must agree to become an Associate Member of NODA and remain in good standing for the duration of the partnership agreement. The NODA Executive Director must approve all marketing efforts and promotional materials related to approved programs, events, and/or services in advance. This includes, but is not limited to, written/printed matter, broadcast and photographic formats, web pages, and facsimiles. All marketing efforts and promotional materials related to approved programs events and/or services must recognize NODA involvement by placement of its name, logo, “branding image”, support statements, disclaimers, and/or other accepted means as agreed upon by both parties. Strategic partners must designate a representative to be the official liaison with NODA. The liaison will be responsible for coordinating all communications with the Association including, but not limited



to, negotiations, program planning, program execution, and/or any concern raised by NODA members.

#### **IV. Responsibilities of NODA**

- To acknowledge the receipt of all proposals in writing within 30 days of receipt.
- Maintain strict confidentiality concerning all proposals and request.
- Review initial proposals and respond in writing within 60 days of receipt.
- To the best of its ability, help to define the proposed program in its broadest context to reach as many NODA members as possible.
- Upon approval, NODA will facilitate the development of a written agreement to be signed by all parties.
- NODA reserves the right to accept and review proposals at its discretion.
- The various regions of NODA may not negotiate educational partnerships.

Once approved, the Executive Director will notify the proposed partner of the decision in writing.

The NODA Board of Directors shall canvas the Association's membership to identify other associations, organizations, and professional groups for potential educational partnerships and garner whether existing partnerships have been beneficial to the membership. This shall take place at least every two years.

#### **V. Submission Process**

NODA reserves the right to accept and review proposals at its discretion. Proposals seeking partnership must be submitted in writing to the NODA Executive Director. Proposals must be submitted at least 120 days in advance of an anticipated implementation date. Review of proposals shall be conducted within 60 days of receipt.

All proposals should include the following documents:

- Letter of intent.
- Description of program, event, and/or service to be provided.
- Proposed memorandum of understanding or draft contract.
- The program description should include by is not limited to:
  - A summary of the partnership request.
  - Background information and experience of the requesting partner.
- A detailed abstract of the proposed program, event, and/or service including:
  - Statement of purpose.
  - Goals of objectives.
  - Clear expectations for all parties.
  - Well-defined outcomes
  - Benefits to NODA and its members
  - Demographic and/or geographic profiles of target population
  - Detailed marketing plan
  - Specific timeline including options for continuation or expansion

- Implementation strategy including resources necessary for success.
- Expectations of NODA and its members relative to implementation of the proposal.
- Proposed budget and financial plan including revenue sharing and payment schedule.
- Procedures for monitoring, reporting and evaluating the proposal.

Proposals for partnership will be reviewed by the NODA Executive Director. Each partnership proposal or amendment accepted by the review Committee must be represented to the Board of Directors individually for consideration and approval. Quorum must be determined and maintained for approval. The Executive Director of NODA will notify the proposed partner of the Board’s decision in writing.

## **Guidelines for the Development of Educational Partnerships**

### **I. Definition of Educational Partners**

At times, the NODA Board of Directors may find it beneficial to the Association to enter into collaborative relationships with educational or nonprofit organizations. These educational partnerships should only be entered into if they advance the goals of the Association, or further position the Association as a professional organization. The Executive Director may explore and negotiate potential partnerships and submit a proposal to be reviewed by the Executive Committee.

The decision to enter into each partnership must be fully grounded in the mission of NODA, the Statement of Professional Ethics and the core values of the Association with the best interests of the membership kept foremost in the decision-making process.

These educational partnership agreements should facilitate NODA’s efforts to support the role orientation, transition and retention play in the lives of member institutions, new students and/or their families.

### **II. Proposal Guidelines and Format**

NODA will assess every proposal for educational partnerships based upon the following guiding principles. It is expected that these principles will be addressed in all written agreements:

- Only proposals for programs, events and/or services that NODA considers central to its mission will be considered.
- Programs must adhere to NODA’s Core Values and Nondiscriminatory Statement.
- Preference will be given to proposals that provide services and/or benefits to the membership and/or positively impacts the recruitment or retention of NODA members.
- The use of the NODA name, logo and/or other images is prohibited unless explicitly included approved memorandum of understanding.
- Any change, regardless of cause, to a partnership agreement is subject to NODA review and approval. All changes must be reflected in writing prior to implementation.

NODA reserves the right to cancel any partnership agreement that it believes compromises the reputation or integrity of the Association or its members, or where it determines that the educational partner is not in compliance with the terms of the partnership agreement.

All proposals must include the following to be considered:

- Submitted on the educational/nonprofit partnership form highlighting the following information:
  - Name of Association/Organization requesting partnership
  - Educational benefits of partnering for NODA
  - Additional advantages to NODA
  - Advantages to prospective educational partner
- Items include but are not limited to:
  - Exhibit exchange at conferences
  - Advertisement exchange in publications
  - Newsletter exchange
  - Presentation exchange at conferences
  - Link on web page to resources
  - Co-host reception
  - Fund program initiative
  - Other

### **III. Responsibility and Expectations of Educational Partners**

- The Executive Director must approve all marketing efforts and promotional materials related to approved programs, events and/or services in advance. This includes, but is not limited to, written/printed matter, broadcast and photographic formats, web pages and facsimiles.
- All marketing efforts and promotional materials related to approved program events and/or services must recognize NODA involvement by placement of its name, logo, “branding image”, support statements, disclaimers and/or other accepted means as agreed upon by both parties.
- Educational partners must designate a representative to be the official liaison with NODA. The liaison will be responsible for coordinating all communications with the Association including, but not limited to, negotiations, program planning, program execution, and/or any concern raised by NODA members.

### **IV. Responsibilities of NODA/Submission and Approval Process**

- To acknowledge the receipt of all proposal in writing within 30 days of receipt.
- Review of proposals shall be conducted within 60 days of receipt.
- The Executive Director will forward the proposal to the Executive Committee for further review the upcoming board meeting.
- Maintain strict confidentiality concerning all proposals and requests.

- Review initial proposals and respond in writing within 30 days following the board meeting.
- To the best of its ability, help to define the proposed program in its broadest context to reach as many NODA members as possible.
- Upon approval, NODA will facilitate the development of a written agreement or memorandum of understanding (MOU) to be signed by all parties.
- NODA reserves the right to accept and review proposals at its discretion.
- The various regions of NODA may not negotiate educational partnerships.

Once approved, the Executive Committee will notify the proposed partner of the decision in writing.

## **Guidelines for the Development of Sponsorship Agreements with NODA**

*These guidelines are intended to ensure that all sponsorship agreements are consistent with NODA's stated mission and core values.*

The mission of the NODA is to provide education, leadership and professional development in the fields of college student orientation, transition and retention.

***Core Values: Community, Diversity, Integrity, Learning, Scholarship, and Service***

### **I. Definition of Sponsorship**

At times, annual and/or conference committees may have the opportunity to enlist outside financial support of conference events or products. All written agreements for such sponsorship should be approved and signed by the Executive Director.

The decision to enter into each agreement must be fully grounded in the mission of NODA, the Statement of Ethical Standards, and the core values of the Association with the best interest of the Membership kept foremost in the decision-making process. These sponsorship agreements should facilitate NODA's efforts to support the role, orientation, transition, and retention play in the lives of new students and/or their families.

### **II. Proposal Guidelines and Format**

NODA will assess every proposal for sponsorship based upon the following guiding principles. It is expected that these principles will be addressed in all written agreements:

- Only proposals for programs, events, and/or services that NODA considers central to its mission will be considered.
- Programs must be inclusive and must not discriminate in accordance with NODA's Nondiscriminatory Statement.
- The use of the NODA name, logo, and/or other images is prohibited unless explicitly included in the sponsorship agreement.
- Any change, regardless of cause, to a sponsorship agreement is subject to NODA review and approval. All changes must be reflected in writing prior to implementation.

- NODA reserves the right to cancel any sponsorship agreement that it believes compromises the reputation or integrity of the Association or its members, or where it determines that the sponsor is not in compliance with the terms of the sponsorship agreement.

### **III. Responsibilities and Expectations of Sponsors**

- Sponsors for the Annual Conference must agree to become an Associate Member of NODA and remain in good standing for the duration of the sponsorship agreement.
- The Executive Director must approve all marketing efforts and promotional materials related to approved programs, events, and/or services in advance. This includes, but is not limited to, written/printed matter, broadcast and photographic formats, web pages, and facsimiles.
- All marketing efforts and promotional materials related to approved programs, events and/or services must recognize NODA involvement by placement of its name, logo, “branding image”, support statements, disclaimers, and/or other accepted means as agreed upon by both parties.
- Sponsors must designate a representative to be the official liaison with NODA. The liaison will be responsible for coordinating all communications with the Association including, but not limited to, negotiations, program planning, program execution, and/or any concern raised by NODA members.

### **IV. Responsibilities of NODA**

- To acknowledge the receipt of all proposals in writing within 30 days.
- Maintain strict confidentiality concerning all proposals and requests.
- Review initial proposals and respond in writing within 60 days of receipt.
- Upon approval, NODA will facilitate the development of a written agreement to be signed by all parties.

### **V. Submission Process**

NODA reserves the right to accept and review proposals at its discretion. Proposals seeking sponsorship must be submitted in writing to the Executive Director. Proposals must be submitted at least 90 days in advance of an anticipated implementation date. Review of proposals shall be conducted within 60 days of receipt. All proposals should include the following documents to be considered:

- Letter of intent.
- Description of program, event, and/or service to be provided.
- Proposal memorandum of understanding or draft contract.
- The program description should include, but is not limited to:
  - A summary of the sponsorship request
  - Background information and experience of the requesting sponsor
  - A detailed abstract of the proposed program, event, and/or service including:

- Statement of purpose
- Goals of objectives
- Clear expectations for all parties
- Well-defined outcomes
- Benefits of NODA and its members
- Implementation strategy including resources necessary for success.
- Expectations of NODA and its members relative to implementation of the proposal
- Procedures for monitoring, reporting, and evaluating the proposal.

The Executive Director will notify the proposed sponsor of their decision in writing.

#### **SOP Updates**

The Association staff will make updates to the Standard Operating Procedures as needed and will notify the Board when changes are made.