

Realizing the Full Potential of Orientation as a Process: Practitioner Perspectives on One University's Pandemic Response for Orientation Efforts

Vincent Prior, Ohio University

Drake Hankins, Ohio University

Miranda Gillilan, Ohio University

The COVID-19 pandemic forced our institution to question how we deliver information to new students. Before the pandemic, students attended an in-person, day-and-a-half orientation program in the summer before their first semester. In the transition to a virtual program format, our institution identified the most critical information delivered in a single-event model and converted it to a more purposeful process, complete with pre-orientation modules, a live virtual event, and post-orientation modules. This article shares specific details about the steps taken in the transition to a three-phased orientation experience, outlines the final product of each phase, and discusses future implications for practice. Specific emphasis is placed on individualized program elements for students, new family and guest programming, and the work of student leaders in a virtual format. Finally, we share advice for professionals and lessons learned that will impact how we approach orientation in the future as we establish a philosophy of orientation as a process, not a program.

Keywords: virtual orientation format, online modules, individualized program, orientation leaders, family orientation, orientation process, COVID-19 pandemic

Introduction

Imagine it is the first day of summer orientation season. You have spent many months preparing for this program, starting when the previous summer's sessions ended. Now, you finally get to see it happen live. You know how every aspect of the program will run and have envisioned a successful implementation according to the plans you and your team laid out. Your staff and campus partners are fully prepared and have received adequate training for what lies ahead in the journey of preparing incoming students this year. You have also considered thousands of possible challenges that you may face and have identified potential solutions to those challenges, as most orientation professionals do in preparing for the summer.

Instead, you wake up from this dream of a typical orientation season and realize that it is actually the beginning of orientation in a year unlike any other. Most of what we would have hoped for is simply not true. At our institution, that reality hit us hard on June 2, 2020, the first day of the summer orientation season. On that day, we hosted the first live, synchronous orientation session—still unsure of so many things that were to come. To borrow a metaphor that many of us adopted as a motto last year, we were “building the plane while we flew it.”

Our purpose in writing this article is to share our experiences in this unique time and describe how we found success by taking advantage of the opportunity to grow and evolve our programs. We share specific programmatic elements of the 2020 orientation model, re-imagined from a single, in-person event to a more

holistic process, complete with pre-orientation modules, a live virtual event, and post-orientation modules in three distinct phases. We also share lessons learned that will impact how we approach orientation in the future as we adopt a philosophy of orientation as a process, not an individual program.

Institutional and Office Context

The institution is a four-year public R2 university (i.e., classified as high research activity by the Carnegie Commission on Higher Education) located in a rural community. Enrollment is over 16,000 undergraduate students with more than 1,000 full-time faculty members. The university offers more than 250 academic programs across nine colleges and one degree-granting center, with degrees ranging from associate to doctorate. Almost all (95%) of first-year students receive financial aid, and over \$12 million in scholarships is awarded to new students annually. Our institution also has a robust support system for first-generation students because this population makes up one third of the overall student population. Additionally, we have five regional campuses, two satellite centers, and an eCampus unit that each oversee their own orientation programs.

Our institution has a university college model. The orientation work on the main campus is part of an office focused on the first year and student transitions within that academic college. Being associated with an academic college provides a unique perspective in that we are housed within an academic unit that also provides student support for undergraduates across the institution. Our office is responsible for helping first-year students succeed both academically and socially and make a smooth transition to university life, regardless of their academic college.

The orientation staff includes one full-time professional staff member and two graduate assistants who assist with orientation throughout the year. Additional professional staff in the larger first-year and student transitions unit provide support during peak periods of the year. The undergraduate team includes three coordinators focusing on specific program elements and 37 orientation leaders, 24 of whom support student orientation efforts while 13 focus on family and guests. For the summer orientation program, we hire four graduate interns and a team of six to eight undergraduate office assistants. Through June orientation programs, we typically serve approximately 3,700 first-year students and 200-300 transfer students, as well as 5,100 family members and guests.

Pre-Pandemic Orientation Model

Before COVID-19, our model was a day-and-a-half program with an overnight component. The majority of the programs took place in June. All sessions during the day were required for students, while evening programming was optional. Throughout the first day, students participated in small-group discussions facilitated by an orientation leader and attended an academic session presented by their college along with other lecture-style sessions. Students enrolled in their academic courses on the second day after attending a session about the new student transition. We hosted approximately 300 students and 430 guests for each of the 12 programs in June. In addition, we held a one-day program for both transfer and first-year students in August, right before the beginning of the semester. These sessions allowed students who missed orientation in June to learn about the campus and enroll in courses in a modified version of the day-and-a-half program. We did not have pre- or post-orientation modules before the pandemic.

The Process to Implement Changes

In early April 2020, we began to consider options for remote orientation programming for the summer and

to identify what was critical to include in a virtual event, if that was required. Students had already signed up for orientation program dates, and one of the primary goals in the transition was to maintain our commitment to those dates regardless of format. The institution decided to shift to a remote format for summer orientation programs on April 13, 2020, which was only seven weeks from the start of the first program in June.

In planning for a remote format, we first needed to critically evaluate all sessions that were part of the previous orientation schedule. In evaluating that content, we identified what was essential for a live event, what content could be provided before that event, and what information was more relevant to the student experience later in the summer. In making these decisions, we focused on what would make the virtual event engaging and interactive while accomplishing the primary objective of course registration. We also needed to identify existing resources on the campus for this transition. We reached out to the eCampus unit early in the process to discuss their pre-existing online modules and the possibility of using the same platform. Thankfully, their existing subscription allowed for this, and we were able to quickly copy their modules as a starting point for developing Phase 1 of the orientation experience. This partnership was critical in launching pre-orientation modules in four weeks.

The next major component of making the transition was working with campus partners. As soon as we decided to shift to a virtual format, we sent a survey to all campus partners involved in orientation to gather suggestions, concerns, and questions people had about the change. We also met with key stakeholders to begin discussing options for the virtual format. The Office of Undergraduate Admissions was one of the first units with whom we met because we needed to plan quickly for communication to students. We then met with the Registrar's Office for specific discussions about how the course registration processes could work in a virtual environment. One of the most important groups with whom we met during that initial planning was the Assistant Deans' Council, which includes representatives from all academic colleges. That group is heavily involved in the orientation process, especially advising and course registration. Those meetings happened in the first two weeks of the transition, while we were also brainstorming ideas for the new virtual model within the orientation team. After those initial meetings and determining the final plans to move forward with the three-phased approach, we scheduled two open forums for the larger campus community. These meetings were an opportunity to share our vision for the new design, incorporating feedback and questions that we collected from the surveys earlier in the process.

The transition provided us with a few challenges, but upon reflection, we took advantage of those challenges and turned them into opportunities. We were able to implement some key initiatives already in the planning stages earlier than expected. One example is the pre-orientation modules we had planned to launch in May 2021 but implemented quickly in 2020. The transition also allowed us to focus more intentionally on the individualized experience of students attending orientation programs. We had intended to infuse this concept into in-person programs to demonstrate care and concern for each student at an individual level, and the new format made that easier to do. Lastly, the quick transition to remote deliverables required more meetings with specific campus partners in a shorter amount of time. We used meetings to brainstorm ideas, collect feedback, and practice virtual events in the new format. These elements of the transition provided us with opportunities to make changes that would usually have taken much longer to implement fully.

The Revised Pandemic Model

In making decisions about the revised model for orientation, we decided to focus on a three-phased approach to summer orientation. This approach allowed us to prioritize just-in-time information that students

needed throughout the process and gave us time to create each of the three phases more intentionally with the limited amount of time we had to implement. In designing the new approach, we focused on building an individualized student experience, maintaining the family and guest program components, and effectively including student leaders in the process.

Three-Phased Approach for Students

The first phase of the new model was pre-orientation modules that incoming students would need to complete before attending virtual events in Phase 2. Students learned about university systems, student services (e.g., financial aid, registrar, bursar), the Student Code of Conduct, and other information necessary for academic advising and course registration in the pre-orientation modules. These modules were released to students in mid-May 2020.

In the second phase of the new approach, we hosted live, virtual programs for incoming first-year and transfer students throughout June, with approximately 300-330 students in each program. These events were presented via Microsoft Teams and included meetings where students and guests received resources and an overview of academic essentials based on their college and major. They also spent time getting to know other students and orientation leaders. The sessions facilitated by orientation leaders centered on how to get involved and the process of registering for courses. After students attended these sessions, they met with an academic advisor to schedule their classes. Before and after course registration, orientation leaders answered any questions students might have about their schedule or the university. On the evening of the first day of each session, orientation leaders provided virtual social activities to allow students to engage with each other and create connections with their peers. These virtual events included approximately three hours of required sessions spread out throughout the first program day. Incoming students also had the option of joining Q&A sessions and additional virtual social programs on the second day of their scheduled orientation.

In Phase 3, students completed required post-orientation modules hosted in the learning management system. These modules included information from the Dean of Students, Division of Diversity and Inclusion, and other campus resources that were not provided or partially discussed during the first two phases. Most of the content would have been provided during the pre-pandemic orientation model, but we also used this as an opportunity to include a few new resources. These modules included short quizzes that students took to demonstrate what they learned and track overall participation and completion. Throughout the summer, students also had the opportunity to connect with orientation leaders and ask questions. Two significant benefits to hosting these modules in the learning management system were the opportunity to familiarize students with that platform before a primarily online fall semester and ongoing access to the information throughout the fall semester, allowing students to access it when needed.

Individualized Program Components

In making this transition, we wanted to focus on personalizing the student experience as much as possible. We knew that many students felt isolated because of the pandemic and thought that individualized attention would be critical in helping them feel a sense of belonging, especially given the challenge of engaging and connecting virtually. In creating virtual events, we replicated elements of the check-in process via a form sent to students for completion before their scheduled program. This form was created using the primary survey tool on campus and sent to students three days before their event. Upon completing the form, students received an automated email with directions for logging in to the event on their program date, a link to join the first session, and resources about using Microsoft Teams. One central element of this form was students identifying which time zone they would be in when joining virtual events. Since most students lived in the Eastern and Central time zones, we avoided early morning start times for the time zones. Students joining from the Mountain or Pacific

time zones received pre-recorded versions of the first sessions of the day in their confirmation email. They could watch the early sessions before their event and join live sessions at a more reasonable time for their time zones. International students typically attended a separate orientation experience in August. They were not a part of those programs in June, which allowed us to focus attention on only domestic time zones for this check-in form. Additionally, students provided the best contact phone numbers for the team to use during the program in the event of technical issues, and they could change their major on the form before the event.

The most crucial aspect of individualizing the virtual event was creating personalized orientation schedules based on the students' academic college, scheduled advising time, assigned small group, and student affiliation groups (e.g., honors, athletes). These schedules also provided all Teams meeting links in one place for the student to connect to sessions during the program, including required and optional sessions on both days. Building these schedules was tedious and time-consuming but ultimately resulted in a simplified process for students—something to which we were committed.

As a first step, the graduate interns and undergraduate coordinators created Teams meetings for every part of the program, including small-group sessions divided by college and scheduling appointments with academic advisors. Since most colleges could accommodate individual appointments, the staff had to create many meetings for each program date. To keep track of each meeting, they created a master Microsoft Word document and copied the link information into the document. These documents proved helpful on the day of implementation as we were quickly able to jump into any session when needed. Next, we modified the program roster in Microsoft Excel to include links to meetings and the individualized program elements for each student. After finalizing that spreadsheet, we used the mail-merge function in Microsoft Word to create a schedule for each student. Embedding active links into a document through mail merge and separating the personalized schedules into individual documents was not a straightforward process. Still, it was something we were able to figure out through research. After merging the information and creating unique documents, the personalized schedules were also saved as a PDF to make them easier for some devices to access.

The rest of the individualized process took place on the day of the program when we checked attendance in the welcome session and reviewed the check-in form to identify who participated that day. The orientation leaders emailed students a personal message welcoming them to the program during the first sessions of the day and attached both the Microsoft Word and PDF versions of their individualized schedules to follow for the rest of the program. Again, the process was complex and took some time to formalize; however, we believe making the virtual event easier to navigate for students and their guests was necessary for the student experience.

Family and Guest Programming

In moving to a virtual orientation format, it was essential to keep family and guest programming. We were planning to expand family and guest orientation elements before the pandemic, so the goal was to do this during the virtual orientation programs. At the beginning of each orientation program, students received a guest schedule to share with their participating family members. The family and guest schedule included times for each session, the descriptions for those sessions, the Microsoft Teams links to join each meeting, and an alternate call-in phone number. All family members and guests had identical schedules, except for a Q&A session specific to their student's academic college. Family members and guests were encouraged to be on the same device with their student for the first sessions of the day.

As part of the new program schedule, we implemented a new session titled "What I Wish My Family Knew." In this session, family and guest orientation leaders shared stories and examples to demonstrate things they wish their families had known when they came to college, as well as sharing their general experiences as first-year students. Another new element in the schedule was a time for families and guests to join discussion rooms

with key offices on campus. Before the pandemic, we had planned to expand family and guest programming to include roundtable discussions; therefore, we decided to create these virtual discussion rooms to simulate the same experience. The room options included the following:

- Life on campus featuring Transportation and Parking Services, Sorority and Fraternity Life, Campus and Community Engagement, Campus Police Department, and Culinary Services;
- Exploring finances with the Office of Financial Aid and Scholarships and the Bursar's Office; and
- Alumni engagement with the Alumni Association.

Traditionally, we had a session for families and guests in which they could write a letter to their student. We created a submission form for family members and guests and included the link in post-orientation assessment emails to replicate this activity virtually. The team sent those letters to students at the beginning of the fall semester via the delivery method indicated on the form. We opted to keep this element of the program because it allows families and guests to reflect on the orientation experience and it is encouraging for students to receive these letters.

Student Leaders

Student leaders play a prominent role in the orientation process, and that continued in the new model. Typically, orientation leaders are a large part of implementing sessions and creating a community for incoming students. In the virtual events, student leaders continued to facilitate sessions for incoming students to acclimate them to university life and provided families and guests with stories and strategies to support their student's college transition. A large part of the student leader position in 2020 was assisting advisors and students in the registration process. When a student met with an advisor to schedule their courses, orientation leaders could finish the appointment if the advisor was running short on time. To wrap up meetings, the leaders would engage with the students to make sure they added all the classes discussed with the advisor.

Similarly, they started advising appointments if an advisor was running slightly behind and interacted with the student while waiting for the advisor. Program participants were also able to meet with student leaders in a scheduling assistance space, which allowed them to ask questions they had before or after their scheduling appointment with the advisor. Student leaders also provided virtual social activities for participants to initiate a sense of belonging and connection to the university and each other. Finally, the student staff filled a critical role in daily administrative tasks that included emailing individualized schedules to students and taking attendance in each session.

Outside of virtual event days in June, student leaders engaged in social media efforts and the post-orientation modules. A robust virtual connection and presence via social media were necessary, and orientation leaders created content to connect with incoming students and keep them engaged throughout all three phases of orientation. Orientation leaders accomplished this through various themed days throughout June, including social media takeovers by individual team members and interviews of their family members to share perspectives on the transition experience. The post-orientation modules provided an opportunity to dive deeper into specific content, and student leaders were able to participate in discussion boards and host activities during that phase, which primarily occurred in July. This phase bridged a gap between June programs and the start of the fall semester. Without the student leaders, many of the opportunities we provided to incoming students throughout the process would not have been possible.

New Visions and Future Implications

Our experiences working in orientation during the COVID-19 pandemic have allowed us to fully realize the potential of treating orientation as a process and not a singular event. While that has been part of our philosophy

and something we were working toward, we were on a slow track for making modifications, and the pandemic forced an accelerated timeline. The past year allowed us to envision something new for the programs and has given us skills and examples to draw on in future practice. Along the way, we created many processes that we intend to use in the future and determined what could be done differently to improve the overall student experience.

We intended to create pre-orientation modules in 2021, but COVID-19 required us to implement them sooner. Due to the success of that phase and the post-orientation modules in Phase 3, we plan to keep those elements and enhance the content to make them more engaging in the future. We identified a gap between orientation programs and the start of the semester, which our office used to continue engaging with incoming students before welcome week programming in the fall semester. As such, we will also increase interactions with incoming students throughout the summer beyond the June events. Since the social media strategy worked well during the virtual orientation process, we will implement a plan to use social media more effectively in the future, especially leading into fall semester programming.

In working on virtual events last summer, we identified a need to have a final touch point with each student, which also speaks to the goal of providing individualized attention within large program groups. In future programs, whether in-person or virtual, we will be using a check-out process for all students participating. This check-out process will provide an opportunity for staff to (a) directly measure some learning outcomes, such as checking to see whether a student can find their schedule in their student center; (b) check student schedules for critical elements, such as a recommended 15-credit-hour course load and enrollment in a learning community; (c) informally assess the student experience in our program and collect feedback; and (d) answer any remaining questions or address specific concerns at an individual level.

Another implication for future practice is in how we communicate with family members and guests about orientation programs. In virtual events last summer, students were responsible for providing their family members and guests with information about orientation sessions. While reviewing feedback from families for summer 2020, we realized that some students did not give that information to guests who had planned to join the sessions. Due to this feedback, we will enhance direct outreach to family members and guests attending programs.

In doing the virtual events, we realized that an online method could be effective. As we prepare for summer 2021 programs, we intend to return to in-person orientations; however, we will continue to have virtual options for students, especially those who live out of state or cannot otherwise attend a June program in-person. We added additional virtual programs in late July and early August 2020 for students unable to participate in June. Those extra sessions created a less stressful experience for advisors and students who typically would have waited until the Thursday or Friday before classes started to attend orientation. Now that we know these virtual programs work, we will explore using that format for options in July and August and connecting with students in person when they arrive on campus in the fall. The new virtual event format also gives us a framework for hosting programs virtually should something else happen in the future that restricts our ability to be in-person, such as a winter weather emergency during January orientations. COVID-19 allowed us to implement new components of orientation and enhance current practices. We will continue to use that knowledge as we plan for the future to ensure we provide the best opportunities and resources for students, families and guests, and staff.

Lessons Learned and Advice to Professionals

In writing this article, we wanted to share experiences and lessons learned from a practical perspective for others in the field to compare their realities of transitions made in response to the pandemic. We hope this

information provides an opportunity for orientation, transition, and retention (OTR) professionals to consider their philosophies of practice and to identify the benefits of thinking about orientation as a process and not a program. Additionally, we believe our experiences and lessons learned will be helpful to those professionals who are (a) planning virtual orientation events, (b) considering multi-phased approaches to orientation processes, (c) experiencing unanticipated transition within their programs (pandemic-related or otherwise), and (d) seeking to validate their practices by intentionally reflecting on comparisons to other institutions.

As we reflected on our work last year and the overall experience, we considered the most pertinent lessons and what we would share with professionals. These include the following:

- ***Students appreciate personalized touch points.*** Even if it is a more complex process or requires more effort, making students feel like individuals when participating in orientation programs is essential. Implementing individual advising, personalized program schedules, and direct contact from orientation leaders truly enhanced the virtual events and how students viewed those events. We hope to use some of these same strategies even for in-person programs in the future as it is challenging to connect with all students individually in large program sessions. These small details can have a significant impact, so our advice would be to figure out how you can personalize elements of your program.
- ***Know your key campus partners.*** Most OTR professionals understand the need to work collaboratively and establish excellent working relationships across campus. Our events and initiatives cannot happen in a silo, which is especially true during times of unanticipated change. The transition to a three-phased approach last summer would have been challenging without the support and encouragement of the academic college staff, campus partners like the information technology unit, and other team members within our larger office. Staff in our office even took on entire components of this transition while also focusing on the work they typically manage during the summer to allow us the ability to focus on other elements of the process. To prepare for unanticipated transitions, we recommend that OTR professionals intentionally develop critical support relationships and think outside the box about who key collaborators might be.
- ***Practicing processes and rehearsing programs is beneficial.*** While preparing for in-person programs last summer, we had planned to offer a complete “dress rehearsal” for advisors and campus partners to understand better the content of the presentations and the larger program context. In keeping with that spirit and understanding that most colleagues were still new to the technology we were using or had concerns going into the virtual events, we hosted four mock sessions in late May. In these sessions, orientation leaders, academic advisors, and presenters practiced using the technology in a shortened version of what we expected in the actual events. We even asked campus partners who were not part of the live virtual events to participate in those sessions in the role of the students. These practice sessions helped identify some minor areas that needed to be changed in the processes and trained staff on using the platform and navigating this new program type. We believe that our success in hosting virtual events was partially due to the amount of time we spent practicing the processes and rehearsing the program, even though we were limited overall on time. We encourage professionals to think about implementing this strategy for all programs and to have people in the campus community go through the experience as students to provide feedback and help identify areas of concern.
- ***Do not underestimate the need for backups and contingency plans.*** Preparing for the unexpected is part of the nature of many OTR professionals. However, many of us were caught off guard and needed to start from scratch due to the pandemic. Starting from ground zero and with limited time to implement, many of us could not prepare the necessary contingencies as we would have in a typical orientation

season. Even after testing the processes and thinking through multiple contingencies, the first program day had its challenges. During that program, we experienced incorrect hyperlinks in all student schedules for advising appointments and students who could not join the welcome session because we had incorrect information about capacities for Teams meetings. The orientation director's Microsoft account was compromised, preventing access to his email for 24 hours. It seemed like a perfect storm of barriers that we could not have anticipated, but because we had prepared for more minor mishaps and incidents, we were able to overcome those first-day problems. Even though we were stressed as we worked through those difficulties, it would have been worse if we had not considered alternate plans that informed the response to those unique situations. Ultimately, this is evidence that backup plans are critical to successful orientation implementation.

- ***Creativity and a willingness to change are essential.*** Even though higher education is notorious for being slow or resistant to change, responding to the pandemic proved that we could change quickly when necessary. In those quick transitions, many of us were forced to solve problems and think strategically about our work in different ways. That opportunity to develop creative solutions is something we should do more often. As we reflect on our institution's experiences with the transition, many of the solutions we ultimately used were not on our radar or even considered as possibilities before the pandemic. However, some of them will become part of our processes moving forward, and those elements will improve student experiences within our programs. If we had not taken the opportunity to consider unknown creative solutions, we might not have found those strategies to enhance our future practice. Taking time to think creatively and being open to changing what we thought we knew about our work was vital to producing the best experience for students. That is something all professionals should be striving to do.

While we know navigating orientation programming during a pandemic is not typical, it is essential to take stock of where we are with our programs and how we ultimately accomplished our goals during summer 2020. Reflecting on that work will highlight some critical programmatic elements that will exist after the worst of the pandemic is over and we return to more normal circumstances. OTR professionals in the field should celebrate those successful efforts over the last year and use this experience as an opportunity to improve future practice, setting the foundations upon which a holistic student experience stands.