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

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

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

**CAS MISSION STATEMENT**

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

**CAS STANDARDS AND GUIDELINES**

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

**OVER FORTY YEARS OF PROFESSIONAL SERVICES**

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

**DISCLAIMER**

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

Please direct your questions to the CAS Executive Director ([executive_director@cas.edu](mailto:executive_director@cas.edu) or 202-862-1400).
A university or college campus is an ideal community where people gather to learn and discuss issues of interest in an open, non-threatening, and enlightened atmosphere. Campuses are centers for symposia, lectures, public events, demonstrations, conferences, and other teaching and learning programs attended by a wide variety of people from all generations, occupations, and educational levels. These events help to identify the campus as a place where scholarly, cultural, social, artistic, athletic, and other activities can freely occur. Conference and events programs enhance diverse campus cultures, and conference subject matter adds depth and variety to campus dialogue. They provide forums for free speech, venues for cultural events, and opportunities for students and scholars to discuss research.

The conference and events professional is usually at the core of these important, educational responsibilities. Conference and events offices are responsible for developing, coordinating and promoting on- and off-campus programs. They address a broad range of organizing, hosting, and logistical service needs. Services include program planning; managing conference centers; developing conferences in conjunction with faculty and staff members; providing services and support for summer youth camps; coordinating guest services; scheduling facilities; and organizing donor events, inaugurations, special celebrations and other traditional, institutional gatherings.

The portfolios of program responsibilities vary among campuses, yet a common focus is that of helping institutions expand their presence and influence beyond the traditional communities of campus faculty, students, and staff. Conference and events programs support institutional planning for events such as celebrations, anniversaries, building campaigns, alumni, and important institutional milestones. Operations may include overseeing the summer operation of residence halls and classrooms; year-round management of full-service conference centers; coordination of large public events held in campus arenas and stadiums; and procurement of services and facilities at off-campus locations. Professional staff members provide everything from multi-department coordination of services to year-round academic support services and professional, event planning consultation. The conference and events office is typically part of business affairs, auxiliary services, student affairs, residential life, or facilities services. If the office has more emphasis on major institutional events, it may be part of institutional advancement, the provost's office, or office of the president.

Increasingly, the conference and events office has become the gatekeeper for many critical issues on campus. Opportunities for expression of free speech occur in an increasingly visible, polarized, and contentious arena. Specific interpretations of free speech are guided by the mission of the college or university (public, private, or religious) and statutes governing that state/province; these decisions affect the opportunities for rentals by community groups. Although members of the public are generally welcome on campuses, there is deep concern about several issues: protection of minors at campus events (such as camps), whether campus-sponsored or by external sponsorship; the acceptable risk level for safety and security; and the guarantee of safe and accessible physical spaces. Through the process of negotiating contracts with community groups, the conference and events professional is increasingly pressured to produce detailed documents that address these issues. Policies may result in additional fees on top of rental rates for facilities and services, which can be contentious. Many issues of the Chronicle of Higher Education contain articles that cover controversial speakers, insufficient oversight to minors on campus, unacceptable solutions to physical accessibility of facilities, complaints over "inconsistent" rental fees, or misrepresentation by event sponsors.

Conference and event programs generate income and provide institutions with additional sources of revenue, which can be substantial, especially for events with multi-year contracts. They contribute to
the availability and continuity of employment for faculty and staff. By providing activities during periods when fewer students are present, space can be scheduled to optimize efficient use of campus resources.

Although the goals of event planning and revenue generation are important to the institution, conference and events departments are typically lean on professional staff. They are usually staffed by undergraduate and graduate student employees. This is viewed as a strength as well as a challenge. The professional field of conference and event services has been built around the development of administrative directors who are skilled, dedicated, and inspired in working with students in a learning environment. These positions are responsible for hiring and training, team building, operations supervision, and developing customer service. Enthusiastic and hard-working students are selected for these positions; they convey a positive view of the campus to conference participants and guests. Students view these as important summer and/or year-round paid positions where they can practice valuable, job-related skills; gain experience working on a team; and learn from an experienced mentor (whether director, assistant director, or graduate intern). Very frequently, these positions can also be created as academic internships for credit in a graduate program, career services, or service-learning requirement.

The conference and events profession has developed from a rudimentary one to a highly challenging, well-defined specialty in less than a quarter century. Several associations for campus conference and event professionals have developed and grown in membership and services. As these associations matured, the need for professional standards became abundantly clear in dialogue among members. In the mid-1990s, a study of service practices by the Canadian University and College Conference Officers Association (CUCCOA) culminated in a summary report that called for establishing international standards for practitioners. In 1997, ACCED-I, CUCCOA, the Association of College and University Housing Officers-International (ACUHO-I), and the British Universities Accommodation Consortium (BUAC which later merged into VENUEMASTERS, which in 2018 became Academic Venue Solutions), collectively agreed on the need for developing professional standards in collaboration with the CAS standards development initiative. The CAS standards and guidelines that follow provide a professional context for the campus conference and event industry and offer a useful assessment tool.

Since 1980, the Association of Collegiate Conference and Events Directors-International (ACCED-I) mission has been to “promote and advance the collegiate conference and events profession and to set the industry standards of excellence” (ACCED-I, n.d.-b, “Who We Are”). Today, ACCED-I consists of over 1,400 campus professionals who design, market, coordinate, and plan conferences and special events on the campuses of colleges and universities around the world. The ACCED-I Core values are celebration, respect for all, professional integrity, diversity and inclusiveness, mutually beneficial relationships, and continued education and professional growth.

ACCED-I has developed a framework of ethics to define conduct within the context of the profession (ACCED-I, n.d.-a). To enjoy the respect and confidence of the larger community as well as other members of the profession, conference and events professionals strive to maintain the highest possible degree of ethical conduct, confidence, and respect of clients through high standards of integrity, skill, and competence. The professional must act at all times with utmost good faith to the institution, client, and members of the public.

In addition to educational forums, conferences and other types of professional development, ACCED-I created two professional certifications for members:

- **Certified Collegiate and Events Professional Certification (CCEP):** The CCEP is based on the CAS Standards. It is designed to elevate professional standards, evaluate individual performance and to recognize those who have reached a very high level of achievement in conference and events management. As a CCEP, successful candidates will demonstrate that they have the desire,
determination, and ability to be among the very best in collegiate-based conference and events management profession.

- One-Stop Shop Certification: This is the industry's premier resource for defining and identifying conforming campus venues. A certified one-stop shop operation provides the most effective planning atmosphere to successfully stage a collegiate conference or event. Certification assures that all parties offer the following: one contact through which a planner may secure all university services; one contract that covers all services the planner will receive from the university; and one bill (itemized) for all services provided by the university.

Conference and events professionals have become sophisticated and savvy leaders of successful campus programming and effective management practices. They are increasingly at the forefront of major campus issues, such as protection of minors on campus and protection of free speech. Current issues and discussions among professionals within the conference and events field also include the following: emergency preparedness and safety, building strong business and community relationships, student staff recruitment and training, managing generations in the workplace, best practices for summer camps and conferences, guideline for hosting minors on campus, efficiencies with on-campus partners, free speech on campuses, event public relations and social media, virtual reality for viewing facilities, conference and events impact on future student enrollment, hosting international guests, maximizing ROI for events, event management tech trends, on-campus conference centers, corporate intern housing, Clery Act, Title IX and conferencing, managing guest expectations, and institutional events.

REFERENCES


CONTEXTUAL STATEMENT CONTRIBUTORS

Current Edition
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CONFEERENCE AND EVENT PROGRAMS
CAS Standards and Guidelines

Guiding Principle: Students and Their Environments

PART 1. MISSION

1.1 Programs and Services Mission

The primary mission of Conference and Event Programs (CEP) is to manage institutional resources for educational conferences, workshops, events, and activities that are relevant and complementary to the mission of the institution.

CEP must develop and define its mission.

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

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

The CEP mission must recognize and accommodate the needs and relevant goals of users of conference and event services as well as institutional agencies that are integral providers of service.

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

1.2 Mission Statement

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

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

PART 2. PROGRAM AND SERVICES

2.1 Program and Services Goals

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

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

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

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

2.2 Program Information and Services

CEP must provide relevant information, services, and resources consistent with its mission and goals.
CEP must provide leadership within and for the institution relative to conference and event planning and management.

Before every conference and event, CEP must clearly communicate with clients and service providers about how the program is going to be managed and onsite issues resolved.

CEP personnel should be timely and forthright in informing conference and event personnel, participants, and students of extraordinary or changing conditions.

CEP must develop and implement strategies for outreach and promotion.

CEP must provide clear and timely descriptions of conference and event activities on campus events calendars and related information sources.

2.3 Program Structure and Framework

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

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

CEP should be organized to reflect institutional characteristics, priorities, and organizational structures so that the needs of the intended primary customer may be effectively met.

Areas for consideration in determining structure and management of CEP may include
- availability and characteristics of facilities
- size, nature, and mission of the institution
- scope of related academic services
- philosophy and delivery system for services
- variety of delivery methods being employed or available to the institution
- degree of integration with other institutional units
- unique access or service needs of the relevant community

CEP may be centralized in one administrative unit in order to provide one-stop access to, and coordination of, services to planners of conferences, events, and similar gatherings. To accomplish this, the CEP office should
- serve as a central point of contact for multiple campus services, particularly in a decentralized environment
- have reasonable access to campus resources and facilities
- provide effective coordination of multiple services
- exercise appropriate authority with regard to campus resources necessary to support conferences and events in collaboration with campus service providers, through, for example, service agreements and memoranda of understanding

CEP may also be structured such that not all functions may exist within the same administrative unit.
Regardless of organizational structures, CEP must work in close consultation and collaboration with others with expertise and resources to meet the needs and interests of students and designated clients.

Because of the likely involvement of multiple campus units in the delivery of conference and event services, CEP leaders may need special authorization to manage resources.

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

CEP may create opportunities for departments to extend employment for employees and interns beyond the regular academic calendar.

CEP may enable educational opportunities for the community that would not otherwise exist.

2.4 Program Design

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

CEP should exercise state-of-the-art meeting and event planning concepts and procedures.

PART 3. STUDENT LEARNING, DEVELOPMENT, AND SUCCESS

3.1 Program Contribution to Student Learning, Development, and Success

Conference and Event Programs (CEP) must contribute to students' formal education, which includes both curricular and co-curricular experiences.

CEP may allow students to benefit from certain programs being brought to the institution.

CEP must contribute to students' progression and timely completion of educational goals.

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

CEP may provide employment and experiential opportunities for students and staff members.

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

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

CEP should encourage understanding and appreciation of the values and mission of the institution.

CEP must implement strategies and tactics to achieve these outcomes.

CEP may engage students in the development and implementation of the program.
3.2 Student Learning and Development Domains and Dimensions

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

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

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

Domain: knowledge acquisition, integration, construction, and application

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

Domain: cognitive complexity

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

Domain: intrapersonal development

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

Domain: interpersonal competence

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

Domain: humanitarianism and civic engagement

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

Domain: practical competence

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

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

3.3 Assessment of Student Learning and Development
CEP must assess the student learning and development outcome domains and dimensions relevant to the functional area.

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

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

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

PART 4. ASSESSMENT

4.1 Establishing a Culture of Assessment

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

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

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

4.2 Program Goals, Outcomes, and Objectives

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

Evaluation of CEP may include goal-related progress on such considerations as stakeholder satisfaction, attendance, cash flow, financial health, and appearance of facilities.

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

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

CEP should collaborate with institutional research units to generate data to project CEP contributions to the local economy, increase student enrollment, or stimulate additional research.

4.3 Assessment Plan and Process

CEP must structure assessment initiatives using the steps of the assessment cycle:

- set program goals, outcomes, and objectives
- develop and implement assessment plan
- review and interpret findings
- develop a plan for data use, continuous improvement, and reassessment
- implement an improvement plan
- review and monitor changes that have been made

CEP must implement the assessment process with methods that reflect universal design principles.
CEP should conduct regular assessment of its services with a representative cross-section from appropriate campus communities.

CEP must employ ethical practices in the assessment process.

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

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

4.4 Gathering Evidence

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

CEP must employ multiple methods and measures of data collection.

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

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

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

4.5 Review and Interpret Findings

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

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

4.6 Reporting Results and Implementing Improvement

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

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

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

CEP must monitor improvements implemented based on assessment results.

CEP must apply results for future planning.

CEP must inform constituents of assessment results and how data have been used for continuous improvement.
CEP should share summary data from its assessment and evaluation activities broadly with all appropriate constituencies including students, administrators, faculty, staff, and clients.

CEP should produce and disseminate an annual report identifying overall goals, activities and programs served, financial contributions, representative participate feedback, and opportunities that contribute to the overall visibility and promotion of the institution.

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

**PART 5. ACCESS, EQUITY, DIVERSITY, AND INCLUSION**

*5.1 Inclusive and Equitable Educational and Work Environments*

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

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

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

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

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

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

*5.3 Advocating for Access, Equity, Diversity, and Inclusion*

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

CEP should provide access to services and information through a variety of formats.

CEP personnel should ensure that programs and services provided through non-institutional third parties are offered on a fair and equitable basis.

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

CEP should make reasonable efforts to inform and educate the community about conference and events that feature unique aspects of diversity.

**CEP must enact culturally responsive, inclusive, respectful, and equitable practices in the provision of services.**
CEP must develop plans for ongoing professional development on cultural competence and workplace inclusion.

5.4 Implementing Access, Equity, Diversity, and Inclusion

CEP must establish goals for access, equity, diversity, and inclusion.

CEP must address the characteristics and needs of diverse constituents when establishing and implementing culturally relevant and inclusive programs, services, policies, procedures, and practices.

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

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

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

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

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

Guiding Principle: Organization, Leadership, and Human Resources

PART 6. LEADERSHIP, MANAGEMENT, AND SUPERVISION

6.1 Leadership

Conference and Event Programs (CEP) leaders must model ethical behavior and demonstrate alignment with institutional mission, goals, and ethical practices.

CEP leaders should ensure that programs are compatible with the mission and values of the institution.

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

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

CEP leaders should cultivate relationships with leaders of academic and administrative departments.

CEP leaders should work cooperatively with campus organizations and units in developing effective programs.

CEP leaders should ensure that effective and appropriate strategies exist for communicating with prospective and current program participants.

CEP leaders should promote equal access for program participants.

CEP leaders should ensure efficient and appropriate use of institutional resources.

**CEP leaders must advance the functional area by**

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

CEP leaders should be aware of the changing needs of clients to assure expectations are congruent with the capabilities of service providers.

CEP leaders should encourage the highest possible service provider capabilities to meet changing client expectations.

CEP leaders should consider student as well as staff and faculty member needs, issues, and perspectives.

**6.2 Management**

**CEP managers must**

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

**6.3 Supervision**

**CEP supervisors must**

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

6.4 Strategic Planning

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

PART 7. HUMAN RESOURCES

7.1 Staffing and Support

Conference and Event Programs (CEP) must identify the level of staffing necessary to achieve its mission and goals.

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

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

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

7.2 Employment Practices

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

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

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

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

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

7.3 Personnel Training and Development

CEP personnel must receive training when hired and professional development throughout their employment.

CEP personnel must be proficient in customer service techniques.

CEP personnel must be knowledgeable about institutional resources, including facilities, safety, and visitor services.

CEP personnel must be knowledgeable about services of institutional agencies and facilities such as housing, dining, recreation, parking, and technology services.

CEP personnel must engage in continuing professional development activities to keep abreast of the research, theories, legislation, policies, and advancements that affect its programs and services.

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

CEP personnel may consider obtaining relevant certifications through meeting planning and higher education associations, such as the Certified Meeting Professional (CMP) or Collegiate Conference and Event Professional (CCEP) designations.

CEP personnel must have access to resources and receive specific training on policies, procedures, and laws related to
• the programs and services they support
• privacy and confidentiality
• student records and sensitive institutional information
• systems and technologies necessary to perform their assigned responsibilities
• sexual misconduct, harassment, and workplace violence
CEP personnel must be trained on how to recognize and address systems of oppression in the workplace and facilitate a welcoming, inclusive work environment.

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

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

7.4 Paraprofessional Personnel

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

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

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

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

PART 8. COLLABORATION AND COMMUNICATION

8.1 Collaboration

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

CEP may create opportunities for departments to fulfill their programmatic goals.

CEP must collaborate with individuals, groups, communities, and organizations to
- establish, maintain, and promote understanding and effective relations
- garner support and resources
- meet the needs of students, designated clients, and other constituents
- achieve program and student outcomes
- engage diverse populations to enrich the educational environment
- disseminate information about programs and services
- solve problems pertinent to the student population, designated clients, or the organization
CEP must collaborate and meet regularly with service providers to coordinate schedules and facility use and to review conferences and events under development.

CEP should establish cooperative relationships with other offices (in addition to direct service providers) such as alumni, enrollment management, athletics, institutional advancement, communications, public relations, and campus information and visitor services.

CEP should share information to stimulate program opportunities and to enhance institutional visibility.

CEP should encourage personnel participation in civic and community organizations (e.g., Convention and Visitors Bureau, Chamber of Commerce, service organizations) and active involvement in professional associations.

CEP must communicate effectively among campus agencies concerning activities that may influence or conflict with planned or potential conferences and events and other campus activities.

CEP should collaborate with clients and service providers to assure that programs have a positive and compatible presence in the campus community.

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

### 8.2 Communication

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

CEP must develop and implement strategies for outreach and promotion.

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

### 8.3 Procedures and Guidelines

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

**Guiding Principle: Ethical Considerations**

**PART 9. ETHICS, LAW, AND POLICY**

**9.1 Ethical Statements**
Conference and Event Programs (CEP) must review and adopt appropriate standards of ethical practice including those of applicable professional associations.

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

9.2 Ethical Practice

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

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

CEP must consider whether prospective clients, programs or events present an ethical conflict for the institution. When potential conflict arises, CEP must consult with appropriate institutional authorities.

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

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

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

CEP must address issues surrounding scholarly integrity.

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

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

9.3 Legal Obligations and Responsibilities

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

CEP must adhere to institution-wide processes that systematically involve academic affairs, student affairs, and administrative units such as police and security, physical plant, and business offices.
CEP must have the authority to initiate and fulfill contracts and written obligations. Agreements must be in place to fairly protect the interests of both the institution and its clients.

CEP must ensure that relevant institutional policies are clearly evident in agreements with clients.

CEP should be aware of client activities on campus and ensure compliance with institutional policies.

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

CEP must have a process for accessing legal advice needed for personnel to carry out their assigned responsibilities.

CEP must not discriminate based upon institutional policies, codes, or governmental laws.

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

9.4 Policies and Procedures

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

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

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

CEP must ensure crisis management policies and procedures are adapted for periods of time when the institution may be closed or operating at reduced capacity (such as break periods or summer months) or for periods during which operational responsibilities are temporarily transferred (such as for residence halls).

9.5 Communication of Ethical and Legal Obligations

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

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

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

Advice and information disclosed by clients, students, faculty, and staff in the course of conducting business should be considered confidential unless disclosure is otherwise required by law or institutional policy.
CEP must create ongoing opportunities to explore and examine basic ethical beliefs important to the functional area.

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

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

9.6 Addressing Harassment and Hostile Environments

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

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

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

PART 10. FINANCIAL RESOURCES

10.1 Funding

Conference and Event Programs (CEP) must have the funding that is necessary to accomplish its mission and goals.

CEP may provide additional revenue derived from income-producing facilities and services.

CEP should be funded, insofar as possible and desirable, from self-generated fees set at fair market rates.

CEP must determine with administrative leadership what funding is necessary.

10.2 Financial Planning

In establishing and prioritizing funding resources, CEP must conduct comprehensive analyses to determine
  • unmet needs of the unit
  • relevant expenditures
  • external and internal resources
  • impact on students and the institution

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

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

10.3 Financial Management
CEP must manage funds in accordance with established governmental laws and institutional policies, procedures, and guidelines.

When self-supported, CEP should be authorized to establish reserve funds if higher-than-expected revenue results in a surplus, as a buffer against future shortfalls.

**CEP must demonstrate responsible stewardship and use of fiscal resources.**

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

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

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

**PART 11. TECHNOLOGY**

**11.1 Systems Management**

Conference and Event Programs (CEP) must have current technology to support the achievement of its mission and goals.

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

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

CEP should ensure that technical support procedures are in place when offering external constituents access to institutional technology.

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

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

**11.2 User Engagement**

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

CEP must ensure that technology addresses constituent needs.

CEP must employ technologies that facilitate user interaction.

CEP must provide secure remote access.
11.3 Compliance and Information Security

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

CEP policies for external constituents using institutional technology should protect the integrity of institutional data, technological resources, and student access.

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

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

11.4 Communication

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

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

CEP must evaluate relevant social media platforms and techniques for communication, and implement those that best meet constituent needs.

CEP must evaluate multiple modes of communication including, but not limited to, phone, text, and web chat.

PART 12. FACILITIES AND INFRASTRUCTURE

12.1 Design of Facilities

Conference and Event Programs (CEP) facilities must be located in suitable spaces designed to support the functional area's mission and goals.

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

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

CEP must incorporate universal design principles.

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

12.2 Work Space

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

CEP personnel must be able to safeguard the privacy of their work.
12.3 Equipment Acquisition

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

CEP must incorporate sustainable practices when purchasing equipment.

12.4 Facilities and Equipment Use

CEP facilities and equipment must be inspected on an established cycle and be in compliance with codes, laws, and established practices for accessibility, health, safety, and security.

CEP must promptly report broken, malfunctioning, defective, unusable, or faulty facilities and equipment to the entity responsible for maintenance.

CEP must develop sustainable practices for facilities use.

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

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

CEP should develop agreements with departments necessary to fulfill the needs of CEP.

General Standards revised in 2018;
CEP content developed/revised in 2002 & 2012

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