



## Chapter Excellence Plan Criteria 2019-2020

### **President**

- The chapter Executive Board has an executive retreat.
- The chapter has short- and long-term goals established for the semester.
- The Pledging Ceremony is performed as outlined in the Delta Upsilon Ritual Book.
- The Ritual Team properly prepares and rehearses Ritual before Initiation.
- The chapter invites parents, faculty, staff and alumni to the Initiation Ceremony by written or electronic correspondence at least two weeks prior to ceremony.
- The chapter maintains an open ceremony for the Initiation of its members by having alumni, family, faculty and staff in attendance.
- The Initiation Ceremony is performed as outlined in the Delta Upsilon Ritual Book.
- The chapter has an established judicial board that follows written policies and procedures for appropriate situations.
- The chapter hosts a meeting where an overview of the Men of Merit Chapter Standards Program and an update on the chapter's progress is provided to 75% of the membership.
- The executive board revisits and assesses goals set each term.
- The President meets with the campus Fraternity/Sorority Life Advisor at least once per term.
- The chapter has a written code of conduct that all members review and sign at the beginning of each academic year. \*
- The chapter has a standard meeting agenda that the President prepares each week prior to the beginning of chapter and Executive Board meetings. \*
- The chapter submits its most recent year's 990 form online to stay current with the IRS before the government and Fraternity-mandated Nov. 15 deadline. \*
- The chapter has updated its Constitution and By-laws in the past 18 months. \*
- President has key responsibilities and duties for position outlined in a written (can be electronic) document to use for officer transition. \*

### **VP Membership Education**

- The chapter follows the Fraternity-mandated Associate Member Education Program time period. This means Pledging to Initiation is no longer than 8 weeks (unless specific exemptions have been provided by IHQ).
- Chapter has at least three outside facilitators conduct sessions for the Associate Member Education Program. Outside facilitators must be individuals outside the chapter such as faculty, staff, advisors, alumni or local community members.
- The parents of associate members are provided with an overview of the Associate Member Education Program and the expectations of membership.
- The date of Initiation will be made clear at the beginning of the associate member education period.
- Associate members attend chapter meetings and the Associate Member Class President gives a report at these chapter meetings.
- Chapter hosts a substance-free associate member retreat.
- All big brothers participate in the Big Brother Orientation session as outlined within the Associate Member Education Program. Additionally, all Big Brothers create a calendar for the semester based on the outline in the Big Brother Guide.
- The Big Brother/Little Brother reveal is conducted in accordance with the guidelines within the Associate Member Education Program, DU Loss Prevention policies, and all other Fraternity policies.
- The chapter creates and has members complete a yearly needs assessment to see what types of program topics, service projects, brotherhood events, etc. they would like to see in the future. \*
- The chapter has a written procedure for supporting members who show signs of drug abuse, mental health issues, financial issues and/ or alcohol abuse, with referral to campus/community resources as part of the program. \*
- The chapter hosts an educational program with another campus organization. \*
- The chapter hosts a workshop/seminar on topics related to collegiate males. \*
- The chapter is involved in a women's rights issue or LGBT event (i.e. Take Back the Night or Safe Zone Training) \*
- The chapter hosts a speaker to inform the chapter about global educational opportunities available on campus or in the community (i.e. study abroad, etc.) \*
- The chapter participates in a campus or community sponsored cultural event. \*
- The chapter hosts a cultural event that is open to the entire campus community. \*

- The chapter hosts a brotherhood night where the chapter is educated on a culture the chapter is unfamiliar with. \*
- The chapter hosts a night for all interested members to discuss pre-selected current social or cultural topics. \*
- The chapter holds a substance-free retreat. \*
- Officer has key responsibilities and a timeline of his duties outlined in a written (can be electronic) document to use for officer transition. \*

### **VP Loss Prevention**

- The chapter hosts a meeting where Loss Prevention policies are discussed with at least 90% of the chapter membership.
- The chapter has a written procedure for event management duty (sober monitors) and a written rotation that includes all chapter members.
- The chapter and its members follow Delta Upsilon Loss Prevention policies and procedures at any event where alcohol is present.
- The chapter hosts a sober monitor training where 90% of the chapter is present.
- The chapter has a speaker present on and discuss mental health and available on-campus resources with at least 75% of the chapter membership. \*
- The chapter has a written crisis management procedure that is reviewed with members during a chapter meeting. \*
- The chapter has a speaker present on and discuss sexual assault prevention with at least 75% of the chapter membership. \*
- The chapter has a speaker present on and discuss hazing prevention and awareness with at least 75% of the chapter membership. \*
- The chapter has a speaker present on and discuss alcohol and drug use with at least 75% of the chapter membership. \*
- Campus or local police/security present on and discuss safety issues related to the campus with at least 75% of the chapter membership. \*
- Officer has key responsibilities and a timeline of his duties outlined in a written (can be electronic) document to use for officer transition. \*

### **VP Finance**

- The families of all associate members and chapter members receive appropriate financial information regarding member/associate member dues, payments, initiation fees, housing fees (when applicable), and collection policies.
- A promissory note is secured from each brother who does not pay his dues on time. Past due or extended payment plans should be disclosed at each chapter meeting in the VP Finance's report.
- Two officer signatures are required on all checks written by the chapter and no chapter credit cards are in existence (debit cards are okay).
- Receipts are required for any reimbursement to members who use personal funds for chapter supplies.
- There is no use of chapter funds for the purchase of alcohol (i.e. slush funds, social funds, portions of house dues, special assessment, extra dues, separate accounts, etc)
- The chapter uses a third-party dues collection system such as LegFi, OmegaFi, GreekBill, etc. \*
- The chapter hosts a program with an alumnus or local resource on personal budgeting. \*
- The chapter hosts a program relating to developing members' understanding of the larger financial issues of the world. \*
- VP develops a balanced budget for all expenses with 5% saved for emergency reserve, with the assistance of the Executive Board and the Alumni Treasurer. \*
- The chapter actively pursues all accounts receivable and total accounts receivable will not exceed 5% of the chapter's total income. \*
- Chapter Advisory Board, Alumni Chapter, and/or a source independent of Delta Upsilon conducts an annual audit or compilation report of the chapter finances (i.e. the books). \*
- Officer has key responsibilities and a timeline of his duties outlined in a written (can be electronic) document to use for officer transition. \*

*Criteria with an asterisk (\*) at the end are to be submitted only once per year*



## VP Recruitment

- The chapter maintains an active recruitment committee with written committee goals and written individual goals.
- The chapter conducts a recruitment skill set seminar.
- The chapter utilizes its social media for recruitment and updates the site(s) regularly.
- The chapter maintains an up-to-date names list throughout the entire year and asks brothers for updates frequently. *Please note this is not a roster, but a recruitment tool.*
- The chapter develops recruitment materials and utilizes available resources designed to educate potential members and their families about the benefits of membership in Delta Upsilon.
- Chapter financial information is advertised to potential new members during the recruitment process. The information should include associate member dues, initiation fees, housing fees, and member dues.
- The chapter advertises to all potential members any financial scholarships available to members or new members.
- The chapter utilizes new members in the recruitment process, for example, asking new members to invite unaffiliated friends to recruitment events, sharing prospective names, etc.
- The chapter has a justice event during recruitment in which potential new members are invited and attend (i.e. attend community event or speaker together, voter registration drive, etc.).
- The chapter has a service event during recruitment in which potential new members are invited and attend (i.e. campus clean-up, volunteer at food pantry, etc.).
- The chapter has a cultural event during recruitment in which potential new members are invited and attend (i.e. visit local museum, attend cultural event on campus together, etc.).
- The chapter hosts a recruitment event where alumni are invited to attend.
- All formal and informal recruitment events are alcohol-free.
- VP Recruitment has detailed recruitment plan including roles and responsibilities for all chapter members.
- The chapter is involved in freshmen orientation activities such as move-in day, activity fairs, etc.\*
- The chapter has written eligibility standards for new members that includes diversity and nondiscrimination policies that mirror that of the Fraternity's Constitution and Bylaws. \*
- The chapter has a written procedure, in chapter by-laws, for the extension of membership bids. \*
- Officer has key responsibilities and a timeline of their duties outlined in a written (can be electronic) document to use for officer transition. \*

## VP Administration

- The chapter creates a master calendar that includes all chapter events and campus cultural events and distributes (can be electronically) to all members by the first week of classes.
- The chapter's Roll Book and Ritual Books are in good condition and stored in a fireproof location.
- Chapter submits chapter news to the IHQ communications team for the *DU Quarterly* by stated due dates.
- A chapter meeting is used to review parliamentary procedure and these procedures are used during chapter meetings. \*
- The chapter catalogs and records individual members' inclusion in structured global experiences (i.e. university, fraternity, or faith-based sponsored service trips, study abroad, etc.; does not have to be international) \*
- 50% of chapter members are in possession of a valid national passport. \*
- Each member of the chapter is involved in at least one campus activity outside of the chapter. \*
- At least 25% of all initiated members hold elected leadership positions in other campus organizations. \*
- At least one-chapter member is an elected or appointed officer in the congress or senate for student government (excludes IFC). \*
- All chapter members complete their online bio card on [deltau.org](http://deltau.org). \*
- Officer has key responsibilities and a timeline of this duties outlined in a written (can be electronic) document to use for officer transition. \*

## VP External Relations

- The chapter publishes (paper or electronically) an alumni/parent newsletter.
- The chapter hosts an alumni speaker outside of Initiation.
- Each member participates or attends at least one philanthropy event sponsored by another Greek organization or campus group (i.e. Dance Marathon, Relay for Life).
- Each member participates in at least one service event sponsored by another Greek organization or campus group (i.e. University Day of Service, service event sponsored by Alpha Phi Omega, etc.).
- The chapter submits a news update to the university newspaper on programming, philanthropies and overall chapter successes. \*
- VP External Relations (or designee) educates the chapter on the difference and purpose of philanthropy and service events. \*
- VP External Relations (or designee) facilitates a training with the chapter on how to use the Helper Helper app and website. \*
- The chapter hosts a philanthropy event to fundraise and bring awareness to the Global Service Initiative. \*
- The chapter participates in a campus or community beautification/cleanup project. \*
- The chapter works with the local alumni board to create an ongoing alumni recognition program. \*
- The chapter attends two campus athletic events wearing letters. \*
- The chapter plans a service event in which 75% of the membership participates and then debriefs using the IHQ provided facilitation guide. \*
- The chapter sponsors a minimum of two alumni and/or parents' events such as Founders Day, Initiation, Parents' Day, Homecoming, etc.\*
- The chapter has at least 50% of members attend one cultural event on campus or in community (i.e. MLK Day speaker, event sponsored by a culturally-based student organization or office, etc.) . \*
- One member from the chapter attends one of the Global Service Initiative trips. \*
- The chapter hosts an appreciation event to thank any faculty/administration/staff who have supported the chapter or its members. \*
- Officer has key responsibilities and a timeline of his duties outlined in a written (can be electronic) document to use for officer transition. \*

## VP Academic Excellence

- The chapter has a structured academic review committee that meets with all members not meeting the chapter minimum standards.
- The chapter has a written academic eligibility requirement for officers and voting written into the chapter's by-laws. These must be a minimum of 2.75 for officers and 2.5 for voting privileges. \*
- The chapter has written and implemented an internal academic mentor program. \*
- The chapter hosts a speaker from the academic resource center or career center regarding topics such as time management, resume building, and/or study skills. \*
- The chapter hosts a speaker from the academic resource center regarding academic workshops/seminars and tutoring offerings on campus. \*
- The chapter directs members to campus tutoring and workshops/seminars. \*
- The chapter maintains a recognition program for members' scholastic achievements (scholarships, great test/paper scores, GPA improvement, etc.) throughout the year. \*
- The chapter hosts a university professional to lead a discussion in his/her area of expertise. \*
- The chapter hosts a workshop on proper conduct in professional settings. \*
- Officer has key responsibilities and a timeline of their duties outlined in a written (can be electronic) document to use for officer transition. \*

Chapter Excellence Plan can be found at  
[www.deltau.org/ChapterExcellence](http://www.deltau.org/ChapterExcellence)

Questions? Email [cep@deltau.org](mailto:cep@deltau.org)

Fall Submission Deadline: Dec. 30, 2019  
Spring Submission Deadline: June 1, 2020