

Chapter Excellence Plan

The Chapter Excellence Plan (CEP) is a reporting and planning tool that ensures each Delta Upsilon chapter is operationally sound and firmly rooted in the Four Founding Principles of the Fraternity.

CEP is separated into seven categories, with Required and Optional criteria in each category. For the 2024 calendar year, there are **70 Required** criteria and **28 Optional** criteria. Required criteria are expected to be completed by all chapters every year, whereas Optional criteria are like elective classes in that a chapter has some flexibility to select which criteria to accomplish, so long as they reach the minimum level noted below.

On an annual calendar year basis (January - December) chapters must complete the following levels of Required and Optional criteria to meet the Men of Merit standard:

- Aspiration: At least 90% of Required criteria and at least 60% of Optional criteria
- Expectation: At least 80% of Required criteria and at least 45% of Optional criteria
- Minimum: At least 70% of Required criteria at least 30% of Optional criteria

If a chapter reaches one level in Required and a different level in Optional, their overall Men of Merit performance in the CEP standard will be based on the lower of the two (for example – if a chapter completes 100% of Required criteria but only 35% of Optional criteria, the chapter will be marked as Minimum overall).

The eight CEP categories are:

Category	Required Criteria	Optional Criteria
President	2	0
VP of Academic Excellence	4**	4
VP of Administration	8**	2
VP of External Relations	6**	8**
VP of Finance	6**	2
VP of Membership Development	5**	4
Associate Member Education	18**	2**
VP of Recruitment	12**	3**
VP of Risk Management	9**	3
Total Criteria	70	28

****Denotes is there is a CEP criteria that is due both in the Fall and the Spring. Pay close attention to the Deadline column to know when items are due. Any item marked as Year, means that particular CEP criteria just needs to be completed during the course of that Officer's term.**

At the beginning of the Spring semester, chapters should utilize the CEP Planning Form to review the Required and Optional criteria and determine their plans for achieving the criteria that year. The planning form is due March 1 to their IHQ staff liaison.

Submission Deadlines

- Criteria should be completed and reported throughout the academic year as events/items are accomplished.
- The deadline for all criteria items for the Fall semester is Dec. 31 at 11:59 p.m. PST.
- Please note – Items submitted within two weeks of the deadlines **are not guaranteed** to be reviewed prior to the close of the form and may not be eligible for re-submission prior to the deadline, if denied.

CEP Category: President

Required or Optional	Deadline	Criteria
Required	Fall	Fall: The Chapter President meets with the campus fraternity/sorority advisor at least once per term. *If campus has F/S professional staff. If the campus does not have a F/S professional, IHQ Liaisons will count towards this requirement.
Required	Spring	Spring: The Chapter President meets with the campus fraternity/sorority advisor at least once per term. *If campus has F/S professional staff. If the campus does not have a F/S professional, IHQ Liaisons will count towards this requirement.

CEP Category: Vice President of Academic Excellence

Required or Optional	Deadline	Criteria
Required	Fall	Fall: The chapter has a written academic resource that includes information on campus tutoring and academic workshops/seminars. This is distributed and/or accessible to all members.
Required	Spring	Spring: The chapter has a written academic resource that includes information on campus tutoring and academic workshops/seminars. This is distributed and/or accessible to all members.
Required	Year	The chapter has a structured Academic Review Committee, including at least one advisor, that meets with all members not meeting the chapter minimum GPA standards each term.
Required	Year	The chapter has academic GPA eligibility requirements for officers and for voting written into the By-laws. Minimum GPA requirements are at least 2.75 for officers and at least 2.5 for voting privileges.
Optional	Year	The chapter has a written and fully implemented internal academic mentoring program (i.e. – brothers paired or grouped together to support each other’s academic success throughout the year).
Optional	Year	The chapter hosts a speaker from the academic resource center regarding academic workshops/seminars, tutoring offerings on campus, study skills, time management, test-taking best practices, etc.
Optional	Year	The chapter maintains a recognition program for members’ academic achievements throughout the year (scholarships, weekly good test/paper grades, GPA improvements, etc.).
Optional	Year	Any additional program, initiative or event related to this position that helps elevate the position beyond what is required by the Chapter Constitution and By-Laws.

CEP Category: Vice President of Administration

Required or Optional	Deadline	Criteria
Required	Fall	Each Executive Board position has a transition document including key responsibilities and a timeline of duties to use for officer transition. This is a how-to guide for executing the role, not just the job description.
Required	Fall	Fall: The chapter has a master calendar that is regularly updated and includes all chapter events. All members have access to the calendar.
Required	Fall	The chapter has a written code of conduct for all members to sign at the beginning of each academic year and when initiated.
Required	Fall	Fall: The chapter establishes short- and long-term goals for the fall and each officer position.
Required	Spring	Spring: The chapter has a master calendar that is regularly updated and includes all chapter events. All members have access to the calendar.
Required	Spring	Spring: The chapter establishes short- and long-term goals for the spring and each officer position.
Required	Year	The chapter has updated its Constitution & By-laws in the past 18 months, including the addition of substance-free housing language (if applicable).
Required	Year	The chapter has a standard meeting agenda that is prepared prior to each chapter meeting and detailed meeting minutes that are emailed or accessible to all members within 24 hours of each chapter meeting.
Optional	Year	The chapter creates and has members complete a yearly needs assessment or survey to understand the type of programs, topics, service projects, brotherhood events, etc. that the chapter would like to host.
Optional	Year	Any additional program, initiative or event related to this position that helps elevate the position beyond what is required by the Chapter Constitution and By-Laws.

CEP Category: Vice President of External Relations

Required or Optional	Deadline	Criteria
Required	Fall	Fall: The chapter works with a local nonprofit organization/agency for ongoing service opportunities. Each chapter member participates in at least one service opportunity with this organization/agency each year.
Required	Fall	Fall: The chapter creates and executes a plan to keep in touch with alumni and parents monthly/quarterly.
Required	Spring	Spring: The chapter works with a local nonprofit organization/agency for ongoing service opportunities. Each chapter member participates in at least one service opportunity with this organization/agency each year.
Required	Spring	Spring: The chapter creates and executes a plan to keep in touch with alumni and parents monthly/quarterly.
Required	Year	The chapter is educated on the purpose of the Global Service Initiative.
Required	Year	At least 75% of the chapter participates in a service event and participates in a debrief session utilizing the IHQ Service Debrief Guide. Examples can include the chapter participates in a campus or community beautification project.
Optional	Year	The chapter sponsors or celebrates an alumni and/or family event, such as Founders Day, Parents Day, Homecoming, etc.
Optional	Year	The chapter hosts an appreciation event or outreach effort to thank campus faculty/staff who have supported the chapter or its members.
Optional	Year	The chapter collaborates with alumni to host an alumni recognition program.
Optional	Fall (every recruitment period)	Fall: The chapter engages alumni in recruitment efforts.
Optional	Spring (every recruitment period)	Spring: The chapter engages alumni in recruitment efforts.
Optional	Year	At least 75% of the chapter is involved in at least one campus student organization outside of the chapter.
Optional	Year	The chapter co-hosts a substance-free social event with another campus organization.
Optional	Year	Any additional program, initiative or event related to this position that helps elevate the position beyond what is required by the Chapter Constitution and By-Laws.

CEP Category: Vice President of Finance

Required or Optional	Deadline	Criteria
Required	Fall	All members, associate members and their families receive chapter financial information prior to each term, including member dues, Initiation fees, housing fees (if applicable), deadlines and collection policies.
Required	Fall	Fall: The chapter has written and detailed financial policies, including no use of chapter funds for the purchase of alcohol or other drugs (i.e. slush funds, social funds, "pass the hat", etc.), receipts required for reimbursement to members who use personal funds for chapter supplies, two signatures required on chapter checks, and promissory notes signed for members on payment plans. Policies are shared with all members each term.
Required	Fall (each recruitment period)	Fall: Financial information is provided to potential new members during the recruitment process. This includes sharing the cost of associate member dues, Initiation fees, housing fees (if applicable), future member dues, and any scholarships that may be available.
Required	Spring	Spring: All members, associate members and their families receive chapter financial information prior to each term, including member dues, Initiation fees, housing fees (if applicable), deadlines and collection policies.
Required	Spring	Spring: The chapter has written and detailed financial policies, including no use of chapter funds for the purchase of alcohol or other drugs (i.e. slush funds, social funds, "pass the hat", etc.), receipts required for reimbursement to members who use personal funds for chapter supplies, two signatures required on chapter checks, and promissory notes signed for members on payment plans. Policies are shared with all members each term.
Required	Spring (each recruitment period)	Spring: Financial information is provided to potential new members during the recruitment process. This includes sharing the cost of associate member dues, Initiation fees, housing fees (if applicable), future member dues, and any scholarships that may be available.
Required	Year	The chapter develops a balanced budget for each year, including a 5% saved for emergency reserve.
Optional	Year	The chapter utilizes promissory notes for chapter members who are unable to pay dues at the beginning of the semester.
Optional	Year	Any additional program, initiative or event related to this position that helps elevate the position beyond what is required by the Chapter Constitution and By-Laws.

CEP Category: Vice President of Membership Education

Chair Position Directly Responsible	Required or Optional	Deadline	Criteria
	Required	Fall	The outgoing and incoming Executive Boards execute an officer transition retreat after elections.
Brotherhood Chair	Required	Fall	Fall: At least once each month, the chapter hosts a substance-free brotherhood event or activity open to all members.
Brotherhood Chair	Required	Spring	Spring: At least once each month, the chapter hosts a substance-free brotherhood event or activity open to all members.
	Required	Year	The chapter hosts a substance-free chapter retreat for all members. Building Better Men Retreats count toward this requirement.
Brotherhood Chair	Required	Year	The chapter hosts an event related to at least one of the Four Founding Principles where at least 75% of members participate.
	Optional	Year	The chapter hosts a speaker regarding topics such as résumé building, applying for internships/jobs, interview skills, etc. or how to conduct yourself in professional settings (i.e. – dining etiquette, how to attend a networking event or career fair, dressing for success, etc.).
	Optional	Year	The chapter hosts a university professional to lead a discussion on their expertise/interest (i.e. – a faculty member speaking about a research topic or current event, etc.) or attend an educational event happening on campus.
	Optional	Year	The chapter hosts a workshop, seminar and/or speaker on men’s issues (i.e. societal challenges for collegiate males, toxic masculinity, men’s health, etc.).
	Optional	Year	Any additional program, initiative or event related to this position that helps elevate the position beyond what is required by the Chapter Constitution and By-Laws.

CEP Category: Vice President of Membership Education

Chair Position Directly Responsible	Required or Optional	Deadline	Criteria
Associate Member Educator	Required	Fall (every instance of AME)	Fall: Associate members and the parents/guardians of associate members are provided an overview of the Associate Member Education Program and the expectations of membership within one week of accepting a bid and/or starting the associate member period.
Associate Member Educator	Required	Fall (every instance of AME)	Fall: The date of Initiation is made clear to all associate members at the start of the associate member period and occurs within 8 weeks of the start of the Associate Member Education (AME) program.
Associate Member Educator	Required	Fall (every instance of AME)	Fall: The chapter hosts a substance-free associate member retreat utilizing the associate member retreat resources provided in the Associate Member Education (AME) program.
Associate Member Educator	Required	Fall (every instance of AME)	Fall: The chapter follows the Fraternity-mandated Associate Member Education (AME) program, including the use of the included educational sessions and Cornerstone Project.
Associate Member Educator	Required	Fall (every instance of AME)	Fall: The Initiation Ceremony is performed as written in the Delta Upsilon Ritual Book.
Associate Member Educator	Required	Fall (every instance of AME)	Fall: The Pledging (Pinning) Ceremony is performed as written in the Delta Upsilon Ritual Book.
Associate Member Educator	Required	Fall (every instance of AME)	Fall: The chapter invites families, friends, faculty, staff and alumni to the Initiation Ceremony by written or electronic correspondence at least two weeks prior to the ceremony.
Associate Member Educator	Required	Fall (every instance of AME)	Fall: All new Big Brothers participate in the Big Brother Orientation sessions as outlined within the Associate Member Education Program and agree to all expectations of serving as a Big Brother, including regular and appropriate interactions with their Little Brother.
Associate Member Educator	Required	Fall (every instance of AME)	Fall: The Big Brother/Little Brother reveal is substance-free at all points and is conducted in accordance with the guidelines in the Associate Member Education Program, DU's Loss Prevention policies, and all other Fraternity and campus policies.
Associate Member Educator	Required	Spring (every instance of AME)	Spring: Associate members and the parents/guardians of associate members are provided an overview of the Associate Member Education Program and the expectations of membership within one week of accepting a bid and/or starting the associate member period.
Associate Member Educator	Required	Spring (every instance of AME)	Spring: The date of Initiation is made clear to all associate members at the start of the associate member period and occurs within 8 weeks of the start of the Associate Member Education (AME) program.
Associate Member Educator	Required	Spring (every instance of AME)	Spring: The chapter hosts a substance-free associate member retreat utilizing the associate member retreat resources provided in the Associate Member Education (AME) program.
Associate Member Educator	Required	Spring (every instance of AME)	Spring: The chapter follows the Fraternity-mandated Associate Member Education (AME) program, including the use of the included educational sessions and Cornerstone Project.

Associate Member Educator	Required	Spring (every instance of AME)	Spring: The Initiation Ceremony is performed as written in the Delta Upsilon Ritual Book.
Associate Member Educator	Required	Spring (every instance of AME)	Spring: The Pledging (Pinning) Ceremony is performed as written in the Delta Upsilon Ritual Book.
Associate Member Educator	Required	Spring (every instance of AME)	Spring: The chapter invites families, friends, faculty, staff and alumni to the Initiation Ceremony by written or electronic correspondence at least two weeks prior to the ceremony.
Associate Member Educator	Required	Spring (every instance of AME)	Spring: All new Big Brothers participate in the Big Brother Orientation sessions as outlined within the Associate Member Education Program and agree to all expectations of serving as a Big Brother, including regular and appropriate interactions with their Little Brother.
Associate Member Educator	Required	Spring (every instance of AME)	Spring: The Big Brother/Little Brother reveal is substance-free at all points and is conducted in accordance with the guidelines in the Associate Member Education Program, DU's Loss Prevention policies, and all other Fraternity and campus policies.
Associate Member Educator	Optional	Fall (every instance of AME)	Fall: The chapter has outside facilitators conduct two or more sessions of the Associate Member Education Program. Outside facilitators include individuals from outside of the undergraduate chapter, including faculty, staff, advisors, alumni and community members.
Associate Member Educator	Optional	Spring (every instance of AME)	Spring: The chapter has outside facilitators conduct two or more sessions of the Associate Member Education Program. Outside facilitators include individuals from outside of the undergraduate chapter, including faculty, staff, advisors, alumni and community members.

CEP Category: Vice President of Recruitment

Required or Optional	Deadline	Criteria
Required	Fall (each recruitment period)	Fall: The chapter conducts a recruitment skills training for all members each term.
Required	Fall (each recruitment period)	Fall: The chapter uses and maintains an the Recruitment tab in the DU Portal as an up-to-date potential new member names list throughout the academic year. This is a recruitment tool, not a roster.
Required	Fall (each recruitment period)	Fall: All formal and informal recruitment events are substance-free.
Required	Fall (each recruitment period)	Fall: The chapter has written eligibility standards for potential new members that includes the nondiscrimination policy in the Fraternity's Constitution & By-laws.
Required	Fall (each recruitment period)	Fall: The chapter has a written procedure in the chapter's By-laws for the extension of membership bids.
Required	Fall (each recruitment period)	Fall: The chapter incorporates the Four Founding Principles into its recruitment efforts/events.
Required	Spring (each recruitment period)	Spring: The chapter conducts a recruitment skills training for all members each term.
Required	Spring (each recruitment period)	Spring: The chapter uses and maintains an the Recruitment tab in the DU Portal as an up-to-date potential new member names list throughout the academic year. This is a recruitment tool, not a roster.
Required	Spring (each recruitment period)	Spring: All formal and informal recruitment events are substance-free.
Required	Spring (each recruitment period)	Spring: The chapter has written eligibility standards for potential new members that includes the nondiscrimination policy in the Fraternity's Constitution & By-laws.
Required	Spring (each recruitment period)	Spring: The chapter has a written procedure in the chapter's By-laws for the extension of membership bids.

Required	Spring (each recruitment period)	Spring: The chapter incorporates the Four Founding Principles into its recruitment efforts/events.
Optional	Fall (each recruitment period)	Fall: The chapter utilizes social media for recruitment and regularly updates the account.
Optional	Spring (each recruitment period)	Spring: The chapter utilizes social media for recruitment and regularly updates the account.
Optional	Year	Any additional program, initiative or event related to this position that helps elevate the position beyond what is required by the Chapter Constitution and By-Laws.

CEP Category: Vice President of Risk Management

Required or Optional	Deadline	Criteria
Required	Fall	The chapter hosts a session each term where Loss Prevention policies are reviewed and risk/event monitor training is provided, with at least 90% of the chapter membership in attendance.
Required	Fall	The chapter has a documented and detailed crisis management and communication plan, and it is reviewed each term during a chapter meeting.
Required	Spring	The chapter hosts a session each term where Loss Prevention policies are reviewed and risk/event monitor training is provided, with at least 90% of the chapter membership in attendance.
Required	Spring	The chapter has a documented and detailed crisis management and communication plan, and it is reviewed each term during a chapter meeting.
Required	Year	The chapter has a written procedure for supporting members who show signs of alcohol or drug abuse, mental health issues, financial issues, etc., with referral to campus/community resources as part of the plan. This is distributed and/or accessible to all members.
Required	Year	The chapter has an established Judicial Board that follows written policies and procedures for judicial situations and that corresponds with the Fraternity's Constitution & By-laws. The chapter's judicial policies and procedures must be included in the submission.
Required	Year	The chapter hosts an external speaker or attends an external presentation on campus on the topic of sexual assault prevention with at least 75% of the membership in attendance.
Required	Year	The chapter hosts an external speaker or attends an external presentation on campus on the topic of alcohol and other drug education with at least 75% of the membership in attendance.
Required	Year	The chapter hosts an external speaker or attends an external presentation on campus on the topic of hazing prevention with at least 75% of the membership in attendance.
Optional	Year	The chapter hosts an external speaker or attends an external presentation on campus on the topic of mental health with at least 75% of the membership in attendance.
Optional	Year	Any additional program, initiative or event related to this position that helps elevate the position beyond what is required by the Chapter Constitution and By-Laws.