

# Chapter Excellence Plan for Associate Chapters

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 nine categories, meant to represent the 8 Executive Board officers and the Associate Member Educator, with Required and Optional criteria in each category. For the 2026 calendar year, there are **57 Required** criteria and **10 Optional** criteria for associate chapters as they work their way toward chartering requirements. Please note that chartered chapters have additional criterion. 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 Chartering standard:

- At least 70% of Required criteria and 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 nine CEP categories are:

Category	Required Criteria	Optional Criteria
President	3**	0
VP of Academic Excellence	3**	1
VP of Administration	5**	0
VP of External Relations	4**	4**
VP of Finance	7**	1
VP of Membership Development	4**	0
Associate Member Education	10**	2**
VP of Recruitment	12**	2**
VP of Risk Management	9**	0
<b>Total Criteria</b>	<b>57</b>	<b>10</b>

**\*\*Denotes that there is a CEP criterion 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 spring criteria is due June 1 at 11:59 p.m. Pacific.
- The deadline for all fall and yearly criteria items is Dec. 31 at 11:59 p.m. Pacific.
- 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	Execution Guidance
Required	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.	Submissions must include an overview of the meeting, including the date of the meeting, who the meeting was with, and what was discussed during the meeting. Submission must include an email screenshot or similar verification from the campus fraternity/sorority advisor show that the meetings occurred.
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.	Submissions must include the written document that outlines key responsibilities and timeline of duties for each Executive Board position. Updates from the past year should be highlighted in each position. This should be submitted by the outgoing President.
Required	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 toward this requirement.	Submissions must include an overview of the meeting, including the date of the meeting, who the meeting was with, and what was discussed during the meeting. Submission must include an email screenshot or similar verification from the campus fraternity/sorority advisor show that the meetings occurred.

## CEP Category: Vice President of Academic Excellence

Required or Optional	Deadline	Criteria	Execution Guidance
Required	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.	Submissions must include a copy of the chapter-specific academic resource and evidence of its distribution or accessibility to all members.
Required	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.	Submissions must include a copy of the chapter-specific academic resource and evidence of its distribution or accessibility to all members.
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.	Submissions must include excerpt from chapter By-laws that demonstrate these eligibility requirements.
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).	Submissions must include the written internal academic mentor program, a description of how it is implemented and who utilizes it.

## CEP Category: Vice President of Administration

Required or Optional	Deadline	Criteria	Execution Guidance
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.	Submissions must include a copy of the code of conduct and evidence that all members signed it.
Required	Fall	The chapter has a master calendar that is regularly updated and includes all chapter events. All members have access to the calendar.	Submissions must include a copy of the chapter's master calendar and evidence of its regular distribution and/or accessibility to all members.
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.	Submissions must include a copy of the chapter's master calendar and evidence of its regular distribution and/or accessibility to all members.
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).	Submissions must include an updated copy (within the past 18 months) of the chapter's Constitution and By-laws, including the addition of the substance-free housing language (if the chapter has a house/facility). Updated sections must be clearly highlighted, including the date of most recent changes.
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.	Submissions must include a sample meeting agenda and minutes and evidence of distribution to all members.

## CEP Category: Vice President of External Relations

Required or Optional	Deadline	Criteria	Execution Guidance
Required	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.	Submissions must include information on the nonprofit organization/agency, a list of service opportunities that the chapter held with this organization/agency, and a list of all members' participation and date(s) of service. Note that this submission is for hands-on service activities, where members dedicate their time to serve. This is not for philanthropy events (fundraising for a cause). Attaching photos of the events is highly recommended.
Required	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.	Submissions must include information on the nonprofit organization/agency, a list of service opportunities that the chapter held with this organization/agency, and a list of all members' participation and date(s) of service. Note that this submission is for hands-on service activities, where members dedicate their time to serve. This is not for philanthropy events (fundraising for a cause). Attaching photos of the events is highly recommended.
Required	Year	The chapter is educated on the purpose of the Global Service Initiative.	Submissions must include a detailed overview of how the chapter was educated on the purpose of the Global Service Initiative, such as a presentation from a past GSI participant, watching and then discussing a GSI video, reading GSI blog posts, etc.
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.	Submissions must include an overview of the project, including what was accomplished, the date it took place, a list of members that participated and an overview of the conversation that occurred during the debrief. Attaching photos of this event is highly recommended.
Optional	Year	The chapter sponsors or celebrates an alumni and/or family event, such as Founders Day, Parents Day, Homecoming, etc.	Submissions must include a detailed overview of the event, the date it took place and a list of who attended. Attaching photos of this event is highly recommended.
Optional	Year	The chapter hosts an appreciation event or outreach effort to thank campus faculty/staff who have supported the chapter or its members.	Submissions must include a detailed overview of the event or effort, the date(s) it took place, who was recognized and who participated. Attaching photos of this event is highly recommended.
Optional	Year	At least 75% of the chapter is involved in at least one campus student organization outside of the chapter.	Submissions must include a list of all members and the student organizations in which they are involved as well as which members hold what positions in each organization, if any.
Optional	Year	The chapter co-hosts a substance-free social event with another campus organization.	Submissions must include a detailed overview of the event, the other campus organization involved, date of the event and percentage of the chapter that attended. Attaching photos of the event is highly recommended.

## CEP Category: Vice President of Finance

Required or Optional	Deadline	Criteria	Execution Guidance
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.	Submissions must include a copy of the financial information and requirements shared with members and their families, as well as evidence of the information's distribution, such as an email screenshot.
Required	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.	Submissions must include a copy of the chapter's detailed financial policies, including the chapter's reimbursement policy, two signatures on a check policy, a copy of the chapter's promissory note template, and a letter from the advisory board verifying that no funds are used for the purchase of alcohol. Submission must also include evidence that the policies are distributed or accessible to all members. This should be submitted at the end of each term.
Required	Fall (each recruitment period)	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.	Submissions must include a copy of the information shared with potential new members regarding finances, dues, scholarship opportunities, etc.
Required	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.	Spring: Submissions must include a copy of the financial information and requirements shared with members and their families, as well as evidence of the information's distribution, such as an email screenshot.
Required	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.	Submissions must include a copy of the chapter's detailed financial policies, including the chapter's reimbursement policy, two signatures on a check policy, a copy of the chapter's promissory note template, and a letter from the advisory board verifying that no funds are used for the purchase of alcohol. Submission must also include evidence that the policies are distributed or accessible to all members. This should be submitted at the end of each term.
Required	Spring (each recruitment period)	Financial information is provided to potential new members during the recruitment process. This includes	Submissions must include a copy of the information shared with potential new members regarding finances, dues, scholarship opportunities, etc.

		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.	Submissions must include a copy of the chapter's budget, specifically highlighting the 5% emergency savings.
Optional	Year	The chapter utilizes promissory notes for chapter members who are unable to pay dues at the beginning of the semester.	Submissions must include a copy of the promissory note template.

## CEP Category: Vice President of Membership Education

Chair Position Directly Responsible	Required or Optional	Deadline	Criteria	Execution Guidance
Brotherhood Chair	Required	Fall	At least once each month, the chapter hosts a substance-free brotherhood event or activity open to all members.	Submissions must include the schedule of brotherhood events/activities, participation numbers and feedback for future brotherhood programming. <b>This should be submitted at the end of each term.</b>
Brotherhood Chair	Required	Spring	At least once each month, the chapter hosts a substance-free brotherhood event or activity open to all members.	Spring: Submissions must include the schedule of brotherhood events/activities, participation numbers and feedback for future brotherhood programming. <b>This should be submitted at the end of each term.</b>
	Required	Year	The chapter hosts a substance-free chapter retreat for all members. Building Better Men Retreats count toward this requirement.	Submissions must include an overview of the retreat, the agenda to show that teambuilding and developmental activities occurred, the date it took place and who attended. Attaching photos of this event is highly recommended. Please note this is separate retreat from the associate member retreat.
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.	Submissions must include a detailed overview of the event, which Principle it tied to, and who attended.

## CEP Category: Vice President of Membership Education

Chair Position Directly Responsible	Required or Optional	Deadline	Criteria	Execution Guidance
Associate Member Educator	Required	Fall (every instance of AME)	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.	Submissions must include a copy of the information sent to associate members and their parents/guardians explaining the purpose and overview of the AME program and general expectations of membership, as well as evidence of the information's distribution, such as an email screenshot.
Associate Member Educator	Required	Fall (every instance of AME)	The chapter hosts a substance-free associate member retreat utilizing the associate member retreat resources provided in the Associate Member Education (AME) program.	Submissions must include an overview of the retreat, the agenda to show that teambuilding and developmental activities occurred, the date it took place, and who attended. Attaching photos of the event is highly recommended.
Associate Member Educator	Required	Fall (every instance of AME)	The Pledging Ceremony is performed as written in the Delta Upsilon Ritual Book.	Submissions must include an agenda or program book for the Pledging Ceremony showing the schedule of events and the Ritual Team roles and names. Attaching photos of this event is highly recommended.
Associate Member Educator	Required	Fall (every instance of AME)	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.	Submissions must include a detailed overview of the Big Brother Orientation session, the date it occurred, who attended and who facilitated the program.
Associate Member Educator	Required	Fall (every instance of AME)	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.	Submissions must include a detailed overview of the Big Brother/Little Brother reveal, the date it took place, and who attended. A letter from the advisory board verifying the event's activities and that it was substance-free must also be submitted.
Associate Member Educator	Optional	Fall (every instance of AME)	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.	Submissions must include the name, relationship to the chapter, and contact info for each outside facilitator and what session they facilitated. Attached photos of these events is highly recommended.
Associate Member Educator	Required	Spring (every instance of AME)	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	Submissions must include a copy of the information sent to associate members and their parents/guardians explaining the purpose and overview of the AME program and general expectations of membership, as well as evidence of the information's distribution, such as an email screenshot.

			accepting a bid and/or starting the associate member period.	
Associate Member Educator	Required	Spring (every instance of AME)	The chapter hosts a substance-free associate member retreat utilizing the associate member retreat resources provided in the Associate Member Education (AME) program.	Submissions must include an overview of the retreat, the agenda to show that teambuilding and developmental activities occurred, the date it took place, and who attended. Attaching photos of the event is highly recommended.
Associate Member Educator	Required	Spring (every instance of AME)	The Pledging Ceremony is performed as written in the Delta Upsilon Ritual Book.	Submissions must include an agenda or program book for the Pledging Ceremony showing the schedule of events and the Ritual Team roles and names. Attaching photos of this event is highly recommended.
Associate Member Educator	Required	Spring (every instance of AME)	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.	Submissions must include a detailed overview of the Big Brother Orientation session, the date it occurred, who attended and who facilitated the program.
Associate Member Educator	Required	Spring (every instance of AME)	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.	Submissions must include a detailed overview of the Big Brother/Little Brother reveal, the date it took place, and who attended. A letter from the advisory board verifying the event's activities and that it was substance-free must also be submitted.
Associate Member Educator	Optional	Spring (every instance of AME)	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.	Submissions must include the name, relationship to the chapter, and contact info for each outside facilitator and what session they facilitated. Attached photos of these events is highly recommended.

## CEP Category: Vice President of Recruitment

Required or Optional	Deadline	Criteria	Execution Guidance
Required	Fall (each recruitment period)	The chapter conducts a recruitment skills training for all members each term.	Submissions must include a detailed overview of the recruitment skills training, the date it took place, who attended, and who presented. Attaching photos of this event is highly recommended.
Required	Fall (each recruitment period)	The chapter's recruitment committee meets at least bi-weekly to discuss the chapter's names list and overall recruitment plan/strategies.	Submissions must include the agendas and minutes from meetings that take place over the course of the semester. <b>This should be submitted at the end of each term and include minutes from all such meetings.</b>
Required	Fall (each recruitment period)	All formal and informal recruitment events are substance-free.	Submissions must include a letter from the advisory board and/or campus fraternity/sorority or IFC advisor verifying the chapter's recruitment activities were substance-free, along with a list of all formal and informal recruitment events.
Required	Fall (each recruitment period)	The chapter has written eligibility standards for potential new members that includes the nondiscrimination policy in the Fraternity's Constitution & By-laws.	Submissions must include the chapter's eligibility standards, including nondiscrimination policies for potential new members that mirror those written in the Fraternity's Constitution & By-laws.
Required	Fall (each recruitment period)	The chapter has a written procedure in the chapter's By-laws for the extension of membership bids.	Submissions must include the procedure for the extension of membership bids from the chapter's By-laws.
Required	Fall (each recruitment period)	The chapter incorporates the Four Founding Principles into its recruitment efforts/events.	Submissions must include an explanation of how the Principles are explicitly demonstrated to PNMs during the recruitment process.
Required	Spring (each recruitment period)	The chapter conducts a recruitment skills training for all members each term.	Submissions must include a detailed overview of the recruitment skills training, the date it took place, who attended, and who presented. Attaching photos of this event is highly recommended.
Required	Spring (each recruitment period)	The chapter's recruitment committee meets at least bi-weekly to discuss the chapter's names list and overall recruitment plan/strategies.	Submissions must include the agendas and minutes from meetings that take place over the course of the semester. <b>This should be submitted at the end of each term and include minutes from all such meetings.</b>
Required	Spring (each recruitment period)	All formal and informal recruitment events are substance-free.	Submissions must include a letter from the advisory board and/or campus fraternity/sorority or IFC advisor verifying the chapter's recruitment activities were substance-free, along with a list of all formal and informal recruitment events.
Required	Spring (each recruitment period)	The chapter has written eligibility standards for potential new members that includes the nondiscrimination policy in the Fraternity's Constitution & By-laws.	Submissions must include the chapter's eligibility standards, including nondiscrimination policies for potential new members that mirror those written in the Fraternity's Constitution & By-laws.
Required	Spring (each recruitment period)	The chapter has a written procedure in the chapter's By-laws for the extension of membership bids.	Submissions must include the procedure for the extension of membership bids from the chapter's By-laws.

Required	Spring (each recruitment period)	The chapter incorporates the Four Founding Principles into its recruitment efforts/events.	Submissions must include an explanation of how the Principles are explicitly demonstrated to PNMs during the recruitment process.
Optional	Fall (each recruitment period)	The chapter utilizes social media for recruitment and regularly updates the account.	Submissions must include a link to social media accounts and screenshots of the specific posts related to recruitment.
Optional	Spring (each recruitment period)	The chapter utilizes social media for recruitment and regularly updates the account.	Submissions must include a link to social media accounts and screenshots of the specific posts related to recruitment.

## CEP Category: Vice President of Risk Management

Required or Optional	Deadline	Criteria	Execution Guidance
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.	Fall: Submissions must include a detailed overview of the program, the name of who presented, the date it took place and who attended. Submissions must also include an example of the chapter's risk/event monitor rotation. This should be submitted at the beginning of each term.
Required	Fall	The chapter has a documented and detailed crisis management and communication plan, and it is reviewed each term during a chapter meeting.	Fall: Submissions must include the chapter's crisis management and communication plan, the name of who presented, the date it was reviewed and who attended. This should be submitted at the end of each term.
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.	Spring: Submissions must include a detailed overview of the program, the name of who presented, the date it took place and who attended. Submissions must also include an example of the chapter's risk/event monitor rotation. This should be submitted at the beginning of each term.
Required	Spring	The chapter has a documented and detailed crisis management and communication plan, and it is reviewed each term during a chapter meeting.	Spring: Submissions must include the chapter's crisis management and communication plan, the name of who presented, the date it was reviewed and who attended. This should be submitted at the end of each term.
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.	Submissions must include a copy of the written procedure, including steps on how to intervene with members, resources available, and evidence of its distribution or accessibility 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.	Submissions must include documentation of the Judicial Board policies and procedures, as well as a summary of cases the Board has heard this year.
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.	Submissions must include a detailed overview of the program, the name of who presented, the date the program took place, who attended and evidence that the presentation occurred (photo, email correspondence from presenter, letter from advisor, etc.) The program must cover at least 30 minutes on the topic of sexual assault prevention.

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.	Submissions must include a detailed overview of the program, the name of who presented, the date the program took place, who attended and evidence that the presentation occurred (photo, email correspondence from presenter, letter from advisor, etc.). The program must cover at least 30 minutes on the topic of alcohol and other drug education.
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.	Submissions must include a detailed overview of the program, the name of who presented, the date the program took place, who attended and evidence that the presentation occurred (photo, email correspondence from presenter, letter from advisor, etc.). The program must cover at least 30 minutes on the topic of hazing prevention.