



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.

The 2020-2021 iteration of CEP represents the first significant revision and overhaul to the plan in nearly 10 years. The shift was made based on feedback and recommendations from undergraduate members, officers, advisors and IHQ staff. While the previous CEP structure had 115 different criteria, the revised version seeks to streamline which criteria are crucial to a chapter's success and allow for increased flexibility based on individual campus situations.

CEP is now separated into seven categories, with Required and Optional criteria in each category. Overall, there are 40 Required criteria and 33 Optional criteria. On an annual basis (August – June) chapters must complete ALL Required criteria and a selection of Optional criteria, corresponding to the following Men of Merit levels:

- Aspiration: All Required criteria and 70% of Optional criteria
- Expectation: All Required criteria and 50% of Optional criteria
- Minimum: All Required criteria and 40% of Optional criteria

If a chapter does not complete all of the Required criteria or completes the Required criteria but not at least 40% of the Optional criteria, the chapter will be considered Below Minimum.

The seven CEP categories are:

CATEGORY	REQUIRED CRITERIA	OPTIONAL CRITERIA
Academic Excellence	3	6
Associate Member Education*	9	1
Campus & Community Involvement	2	9
Health, Safety & Prevention	3	6
Membership Development	2	6
Operations	15	0
Recruitment*	6	5
Total Criteria	40	33

At the beginning of each academic year, chapters are required to submit the CEP Planning Form, in which they will select the optional criteria they intend to meet that year. The planning form is due the same day as Rosters—Sept. 15 for most chapters, Oct. 1 for those on quarters or with approved calendar exemptions. The planning form will be used as a goal-setting guide for the chapter, officers, advisors and IHQ staff liaison and will aid in assessing the chapter's performance at the end of the academic year. Chapters will have the opportunity to reassess the CEP Planning Form by the Feb. 1 Roster deadline and resubmit an updated form, if necessary. Additional review of the planning form will take place at the Presidents Academy and Regional Leadership Academy. The corresponding CEP Guidebook Excel document provides additional details for each criterion, including submission execution guidance and the Four Founding Principles connection, and should be reviewed prior to submitting the CEP Planning Form and throughout the academic year.

Criteria should be completed and reported throughout the academic year. The deadline for fall term submissions is Dec. 30 at 11:59 p.m. PST. The deadline for spring term and year-round CEP submissions is June 1 at 11:59 p.m. PDT.

*Please note: Criteria in the Associate Member Education and Recruitment categories are applicable for the term(s) in which a chapter recruits and has associate members. This will need to be specified on the chapter's CEP Planning Form that is submitted in the fall and spring. If a chapter recruits and takes associate members each term, then the Required criteria in those categories would apply in both fall and spring.

CEP CATEGORY: ACADEMIC EXCELLENCE

	CRITERIA
Required	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	The chapter has academic GPA eligibility requirements for officers and for voting written into the By-laws. Minimum GPA requirements are 2.75 for officers and 2.5 for voting privileges.
Required	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.
Optional	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	The chapter hosts a speaker from the campus career center regarding topics such as résumé building, applying for internships/jobs, interview skills, etc.
Optional	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	The chapter maintains a recognition program for members’ academic achievements throughout the year (scholarships, weekly good test/paper grades, GPA improvements, etc.).
Optional	The chapter hosts a university professional to lead a discussion on their area of expertise (i.e. – a faculty member speaking about a research topic or current event, etc.).
Optional	The chapter hosts a workshop on how to conduct yourself in professional settings (i.e. – dining etiquette, how to attend a networking event or career fair, dressing for success, etc.).

CEP CATEGORY: ASSOCIATE MEMBER EDUCATION

Criteria in this Category are only applicable during the term(s) the chapter has associate members.

	CRITERIA
Required	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.
Required	The date of Initiation is made clear to all associate members at the start of the associate member period.
Required	The chapter hosts a substance-free associate member retreat.
Required	The chapter follows the Fraternity-mandated Associate Member Education Program and time period (i.e. – no longer than 8 weeks from the Pledging Ceremony to the Initiation Ceremony, unless exemptions have been approved by Delta Upsilon IHQ).
Required	The Initiation Ceremony is performed as written in the Delta Upsilon Ritual Book.
Required	The Pledging Ceremony is performed as written in the Delta Upsilon Ritual Book.
Required	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.
Required	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.
Required	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.
Optional	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: CAMPUS & COMMUNITY INVOLVEMENT

	CRITERIA
Required	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	The chapter is educated on the purpose of the Global Service Initiative.
Optional	The chapter participates in a campus or community beautification or clean-up project.
Optional	The chapter has least 75% of members attend a cultural and/or justice-focused event on campus or in the community (i.e. MLK Day speaker, equality rally, educational event sponsored by a culturally-based student organization or campus office, etc.).
Optional	The chapter sponsors or celebrates an alumni and/or family event, such as Founders Day, Parents Day, Homecoming, etc.
Optional	The chapter attends a campus athletic event wearing letters (varsity games, not intramurals).
Optional	The chapter hosts an appreciation event or outreach effort to thank campus faculty/staff who have supported the chapter or its members.
Optional	The chapter collaborates with alumni to host an alumni recognition program.
Optional	At least 25% of all initiated members hold elected leadership positions in other campus organizations.
Optional	Each member of the chapter is involved in at least one campus student organization outside of the chapter.
Optional	At least one member serves on the Interfraternity Council (IFC) executive board.

CEP CATEGORY: HEALTH, SAFETY & PREVENTION

	CRITERIA
Required	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	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	The chapter has a documented and detailed crisis management and communication plan, and it is reviewed each term during a chapter meeting.
Optional	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.
Optional	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.
Optional	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	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	The chapter hosts an external speaker or attends an external presentation by the campus/local police department/safety office or campus judicial office with at least 75% of the membership in attendance.
Optional	The chapter hosts an external speaker or attends an external presentation on campus on the topic of crisis management with at least 75% of the membership in attendance.

CEP CATEGORY: MEMBERSHIP DEVELOPMENT

	CRITERIA
Required	The chapter hosts a substance-free chapter retreat.
Required	At least once each month, the chapter hosts a substance-free brotherhood event or activity open to all members.
Optional	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	The chapter hosts an internal discussion group for all interested members to discuss societal, cultural and/or justice-related topics or current events.
Optional	The chapter is involved in a women's or LGBTQIA+ empowerment, appreciation and/or educational event (i.e. "Take Back the Night", Safe Zone training, etc.).
Optional	The chapter hosts a cultural and/or justice-focused event that is open to the entire campus community, and individuals from outside the chapter attend.
Optional	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	The chapter hosts a program with an alumnus or local resource on personal budgeting and financial management (i.e. planning for retirement, managing student loan debt, preparing to purchase a home, etc.).

CEP CATEGORY: OPERATIONS

	CRITERIA
Required	Each Executive Board position has key responsibilities and a timeline of duties outlined in a written or electronic document to use for officer transition.
Required	The chapter has a master calendar that is regularly updated and includes all chapter events. All members have access to the calendar.
Required	All chapter members have completed their online Bio Card on deltau.org .
Required	The chapter develops a balanced budget for each year, including 5% saved for emergency reserve, and all accounts receivable paid in full each year.
Required	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	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	The chapter submits chapter and/or individual member news to IHQ for the <i>DU Quarterly</i> twice per academic year.
Required	The chapter publishes (paper or electronically) an alumni/family newsletter.
Required	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	The chapter establishes short- and long-term goals for each term and each officer position.
Required	The Chapter President meets with the campus fraternity/sorority advisor at least once per term. <i>*If campus has F/S professional staff.</i>
Required	The chapter has a written code of conduct for all members to sign at the beginning of each academic year and when initiated.
Required	The chapter has updated its Constitution & By-laws in the past 18 months, including the addition of substance-free housing language (if applicable).
Required	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.
Required	The outgoing and incoming Executive Boards execute an officer transition retreat after elections.

CEP CATEGORY: RECRUITMENT

Criteria in this Category are only applicable during the term(s) the chapter recruits.

	CRITERIA
Required	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	The chapter conducts a recruitment skills training for all members.
Required	The chapter maintains an up-to-date potential new member names list throughout the academic year and regularly asks brothers for updates. This is a recruitment tool, not a roster.
Required	All formal and informal recruitment events are substance-free.
Required	The chapter has written eligibility standards for potential new members that includes the nondiscrimination policy in the Fraternity's Constitution & By-laws.
Required	The chapter has a written procedure in the chapter's By-laws for the extension of membership bids.
Optional	The chapter has a justice-related event during recruitment in which potential new members are invited and attend (i.e. host or attend a community event or speaker together, participate in a voter registration drive, etc.).
Optional	The chapter has a service event during recruitment in which potential new members are invited and attend (i.e. participate in a campus clean-up, volunteer at a food pantry, etc.).
Optional	The chapter has a cultural-related event during recruitment in which potential new members are invited and attend (i.e. visit a local museum, attend a campus play/art show/music recital, etc.).
Optional	The chapter hosts a recruitment event where alumni are invited to attend.
Optional	The chapter utilizes social media for recruitment and regularly updates the account.