

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 Fall 2023 semester, there are **31 Required** criteria and **13 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 academic year basis (August – June) 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 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 95% of Required criteria but only 35% of Optional criteria, the chapter will be marked as Minimum overall).

The seven CEP categories are:

Category	Required Criteria	Optional Criteria
Academic Excellence	2	2
Associate Member Education	8	1
Campus & Community Involvement	2	3
Health, Safety & Prevention	6	2
Membership Development	2	2
Operations	7	2
Recruitment	4	1
Total Criteria	31	13

At the beginning of the Fall 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 October 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: Academic Excellence

Required or Optional	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. <i>Submissions must include committee membership, and a summary of the assistance provided to members not meeting chapter minimum GPA standards.</i>
Required	The chapter has a written document that includes information on campus academic resources and/or tutoring. This is distributed and/or accessible to all members. <i>Submissions must include a copy of the document and evidence of its distribution or accessibility to all members.</i>
Optional	The chapter has an internal, chapter-wide academic mentoring program (i.e. brothers paired or grouped together to support each other's academic success throughout the year). <i>Submissions must include a description of the internal academic mentor program and a list of the mentors/mentee groupings.</i>
Optional	The chapter hosts an external speaker on the topic of academic resources (i.e. academic workshops/seminars, tutoring offerings on campus, study skills, time management, test-taking best practices, etc.) <i>Submissions must include an overview of the program, the name and title of who presented, the date the program took place, number of members in attendance, and email correspondence or documentation from the presenter.</i>

CEP Category: Associate Member Education

Required or Optional	Criteria
Required	Associate members and the parents/guardians of associate members are provided an overview of the Associate Member Education (AME) program and the expectations of membership within one week of accepting a bid. <i>Submissions must include a copy of the information sent to associate members and their parents/guardians as well as evidence of distribution.</i>
Required	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. <i>Submissions must include a copy of the information sent to associate members as well as evidence of distribution.</i>
Required	The chapter hosts a substance-free associate member retreat utilizing the associate member retreat resources provided in the Associate Member Education (AME) facilitator guide. <i>Submissions must include an overview of the retreat, the agenda showing what teambuilding and developmental activities occurred, the date it took place, and who attended.</i>
Required	The chapter implements the Fraternity-mandated Associate Member Education (AME) program as outlined in the facilitator guide, including a Cornerstone Project. <i>Submissions must include a detailed overview of the AME program showing dates of all educational sessions, who presented, which learning outcomes were covered in each session, and a description of the Cornerstone project.</i>
Required	The Initiation Ceremony is performed as written in the Delta Upsilon Ritual Book. <i>Submissions must include an agenda or program book for the Initiation Ceremony showing the schedule of events and the Ritual Team roles and names.</i>
Required	The Pledging Ceremony is performed as written in the Delta Upsilon Ritual Book. <i>Submissions must include an agenda or program book for the Pledging Ceremony showing the schedule of events and the Ritual Team roles and names.</i>
Required	All new Big Brothers participate in the Big Brother Orientation program as outlined in the Associate Member Education Program. <i>Submissions must include a detailed overview of the Big Brother Orientation session, the date it occurred, who attended and who facilitated the program.</i>
Required	The Big Brother/Little Brother reveal is entirely substance-free and aligns with the guidelines in the Associate Member Education Program, DU's Loss Prevention Policies, and all other Fraternity and campus policies. <i>Submissions must include a detailed overview of the Big Brother/Little Brother reveal, the date it took place, and who attended.</i>
Optional	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. <i>Submissions must include a copy of the invitation and evidence of distribution.</i>

CEP Category: Campus & Community Involvement

Required or Optional	Criteria
Required	The chapter is educated on the purpose of the Global Service Initiative. <i>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.</i>
Required	At least 75% of the chapter is involved in at least one campus student organization outside of the chapter. <i>Submissions must include a list of all members and the student organizations in which they are involved.</i>
Optional	The chapter participates in a campus or community beautification or clean-up project. <i>Submissions must include an overview of the project, including what was accomplished, the date it took place and a list of members that participated.</i>
Optional	The chapter sponsors or celebrates an alumni and/or family event, such as Founders Day, Parents Day, Homecoming, etc. <i>Submissions must include a detailed overview of the event, the date it took place and a list of who attended.</i>
Optional	The chapter collaborates with alumni to host an alumni recognition program. <i>Submissions must include a detailed summary of the program, a list of alumni recognized and information on how the chapter and alumni collaborated on the program.</i>

CEP Category: Health, Safety & Prevention

Required or Optional	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. This is distributed and/or accessible to all members. <i>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.</i>
Required	The chapter hosts a session each term where the Loss Prevention Policies are reviewed and risk/event monitor training is provided, with at least 90% of the chapter membership in attendance. <i>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.</i>
Required	The chapter has a detailed crisis management and communication plan that is reviewed each term with 90% in attendance. <i>Submissions must include the chapter's crisis management and communication plan, the name of who presented, the date it was reviewed and who attended.</i>
Required	The chapter has an established Judicial Board with written policies and procedures that correspond with the Fraternity's Constitution & By-laws. <i>Submissions must include a copy of the Judicial Board's policies and procedures, who serves on it, how often they meet, and a summary of cases the Board has heard this year.</i>
Required	The chapter hosts an external speaker or attends an external presentation on the topic of alcohol and other drug education at least 30 minutes long with at least 75% of the membership in attendance. <i>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.</i>
Required	The chapter hosts an external speaker or attends an external presentation on the topic of hazing prevention at least 30 minutes long with at least 75% of the membership in attendance. <i>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.</i>
Optional	The chapter hosts an external speaker or attends an external presentation on the topic of mental health at least 30 minutes long with at least 75% of the membership in attendance. <i>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.</i>
Optional	The chapter hosts an external speaker or attends an external presentation on the topic of sexual assault prevention at least 30 minutes long with at least 75% of the membership in attendance. <i>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.</i>

CEP Category: Membership Development

Required or Optional	Criteria
Required	The chapter hosts a substance-free brotherhood event or activity open to all members at least once each month. <i>Submissions must include a brief description of each monthly brotherhood event/activity and participation numbers.</i>
Required	The chapter hosts an event related to at least one of the Four Founding Principles where at least 75% of members participate. <i>Submissions must include a detailed overview of the event, which Principle it tied to, and who attended.</i>
Optional	The chapter administers a yearly needs assessment/survey to understand the type of programs, topics, service projects, brotherhood events, etc. that the chapter would like to host. Note this is separate from the Membership Outcomes Assessment. <i>Submissions must include the needs assessment/survey, a summary of results, the percentage of participation and when/how officers reviewed the results.</i>
Optional	The chapter hosts a substance-free chapter retreat for all members separate from the associate member retreat. Building Better Men Retreats count for this requirement. <i>Submissions must include an overview of the retreat, the date it took place and who attended.</i>

CEP Category: Operations

Required or Optional	Criteria
Required	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. <i>Submissions must include the written document that outlines key responsibilities and timeline of duties for each Executive Board position.</i>
Required	The chapter has a master calendar that is regularly updated and includes all chapter events. All members have access to the calendar. <i>Submissions must include a copy of the chapter's master calendar and evidence of its regular distribution and/or accessibility to all members.</i>
Required	The chapter develops a balanced budget for each year, including 5% saved for emergency reserve. <i>Submissions must include a copy of the chapter's budget specifically showing the 5% emergency savings.</i>
Required	All members and their parents/guardians receive chapter financial information prior to each term, including member dues, housing fees (if applicable), deadlines and collection policies. <i>Submissions must include a copy of the financial information shared as well as evidence of the information's distribution.</i>
Required	The chapter has a written code of conduct for all members to sign at the beginning of each academic year that is aligned with the International Code of Conduct. <i>Submissions must include a copy of the code of conduct and evidence that all members signed it.</i>
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 after each chapter meeting. <i>Submissions must include a sample meeting agenda and minutes and evidence of distribution to all members.</i>
Required	The outgoing and incoming Executive Boards host an officer transition retreat after elections. <i>Submissions must include a detailed overview of the officer transition retreat, including topics covered, who attended and who presented.</i>
Optional	The chapter publishes a newsletter for alumni and family members. This may be created in conjunction with chapter alumni, but it cannot be an alumni-only newsletter. <i>Submissions must include a copy of the alumni/family newsletter and evidence of its distribution.</i>
Optional	The chapter establishes short- and long-term goals for the term and each officer position. <i>Submissions must include a copy of the chapter's and each officer's short-and long-term goals for the term.</i>

CEP Category: Recruitment

Required or Optional	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. <i>Submissions must include a copy of the information shared with potential new members regarding finances, dues, scholarship opportunities, etc.</i>
Required	The chapter conducts a recruitment skills training for all members. <i>Submissions must include a detailed overview of the recruitment skills training, the date it took place, who attended, and who presented.</i>
Required	The chapter utilizes social media for recruitment and regularly updates the account. <i>Submissions must include screenshots of the specific posts related to recruitment.</i>
Required	The chapter incorporates the Four Founding Principles into its recruitment efforts/events. <i>Submissions must include an explanation of how the Principles are explicitly demonstrated to PNMs during the recruitment process.</i>
Optional	The chapter engages alumni in recruitment efforts. <i>Submissions must include a detailed overview of how alumni are engaged in recruitment efforts and evidence of participation.</i>