



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. Overall, there are **42 Required** criteria and **25 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 in a given year, 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: 100% of Required criteria and at least 70% of Optional criteria
- Expectation: At least 90% of Required criteria and at least 50% of Optional criteria
- Minimum: At least 80% of Required criteria and at least 40% 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 45% of Optional criteria, the chapter will be marked as Minimum overall).

The seven CEP categories are:

Category	Required Criteria	Optional Criteria
Academic Excellence	3	5
Associate Member Education	9	1
Campus & Community Involvement	2	6
Health, Safety & Prevention	7	4
Membership Development	3	4
Operations	12	0
Recruitment	6	5
Total Criteria	42	25

At the beginning of each academic year, 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. Chapters have the opportunity to reassess the CEP Planning Form and submit an updated form in the spring, if necessary, by February 15. Additional review of the planning form will take place at the Presidents Academy and Regional Leadership Academy.

Submission Deadlines

- Criteria should be completed and reported throughout the academic year as events/items are accomplished.
- The deadline for fall term submissions is Dec. 31 at 11:59 p.m. PST.
- The deadline for winter/spring term and year-round CEP submissions is June 1 at 11:59 p.m. PDT.
- 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	<p>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 documentation of the committee's policies and procedures, committee membership, the academic plan template used to work with members, and a summary of the assistance provided to members not meeting chapter minimum GPA standards.</i></p>
Required	<p>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. <i>Submissions must include excerpt from chapter By-laws that demonstrate these eligibility requirements.</i></p>
Required	<p>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. <i>Submissions must include a copy of the chapter-specific academic resource and evidence of its distribution or accessibility to all members.</i></p>
Optional	<p>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). <i>Submissions must include the written internal academic mentor program, a description of how it is implemented and who utilizes it, and feedback for how the program can be improved in the future.</i></p>
Optional	<p>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.). <i>Submissions must include an overview of the program, the name of who presented, the date the program took place, who from the chapter attended and email correspondence or documentation from the presenter.</i></p>
Optional	<p>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. <i>Submissions must include an overview of the program, the name of who presented, the date the program took place, who from the chapter attended and email correspondence or documentation from the presenter.</i></p>
Optional	<p>The chapter maintains a recognition program for members' academic achievements throughout the year (scholarships, weekly good test/paper grades, GPA improvements, etc.). <i>Submissions must include a detailed summary of the recognition program and a list of members recognized for their achievements.</i></p>
Optional	<p>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.). <i>Submissions must include an overview of the program, the name of who presented, the date the program took place, who from the chapter attended and email correspondence or documentation from the presenter.</i></p>

CEP Category: Associate Member Education

Required or Optional	Criteria
Required	<p>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 and/or starting the associate member period.</p> <p><i>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.</i></p>
Required	<p>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.</p> <p><i>Submissions must include the communication given to associate members about the date of Initiation and the 8-week length of the AME program.</i></p>
Required	<p>The chapter hosts a substance-free associate member retreat utilizing the associate member retreat resources provided in the Associate Member Education (AME) program.</p> <p><i>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.</i></p>
Required	<p>The chapter follows the Fraternity-mandated Associate Member Education (AME) program, including the use of the included educational sessions and Cornerstone Project.</p> <p><i>Submissions must include a detailed overview of the AME program showing alignment with the International Fraternity's AME program, as well as a letter from the advisory board verifying the chapter's use of the Fraternity-mandated AME program and length of the program.</i></p>
Required	<p>The Initiation Ceremony is performed as written in the Delta Upsilon Ritual Book.</p> <p><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. Attaching photos of this event is highly recommended.</i></p>
Required	<p>The Pledging Ceremony is performed as written in the Delta Upsilon Ritual Book.</p> <p><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. Attaching photos of this event is highly recommended.</i></p>
Required	<p>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.</p> <p><i>Submissions must include a copy of the invitation and a list of those invited (name, relationship to chapter, etc.)</i></p>
Required	<p>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.</p> <p><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></p>
Required	<p>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.</p> <p><i>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.</i></p>
Optional	<p>The chapter has outside facilitators conduct two or more educational sessions of the Associate Member Education (AME) program. Outside facilitators include individuals from outside of the undergraduate chapter, including faculty, staff, advisors, alumni and community members.</p> <p><i>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.</i></p>

CEP Category: Campus & Community Involvement

Required or Optional	Criteria
Required	<p>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.</p> <p><i>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.</i></p>
Required	<p>The chapter is educated on the purpose of the Global Service Initiative.</p> <p><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></p>
Optional	<p>The chapter participates in a campus or community beautification or clean-up project.</p> <p><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. Attaching photos of this event is highly recommended.</i></p>
Optional	<p>The chapter has least 75% of members attend an external 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.).</p> <p><i>Submissions must include a detailed summary of the event and a list of the members who attended. Attaching photos of this event is highly recommended.</i></p>
Optional	<p>The chapter sponsors or celebrates an alumni and/or family event, such as Founders Day, Parents Day, Homecoming, etc.</p> <p><i>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.</i></p>
Optional	<p>The chapter hosts an appreciation event or outreach effort to thank campus faculty/staff who have supported the chapter or its members.</p> <p><i>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.</i></p>
Optional	<p>The chapter collaborates with alumni to host an alumni recognition program.</p> <p><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></p>
Optional	<p>At least 75% of the chapter is involved in at least one campus student organization outside of the chapter. In addition, 20% of the membership hold a leadership role in other campus organizations.</p> <p><i>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.</i></p>

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 as part of the plan. 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 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 documented and detailed crisis management and communication plan, and it is reviewed each term during a chapter meeting. <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 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. <i>Submissions must include documentation of the Judicial Board policies and procedures, the relevant sections from the chapter's By-laws, as well as a summary of cases the Board has heard this year.</i>
Required	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. <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 (photo, email correspondence from presenter, letter from advisor, etc.) The program must cover at least 30 minutes on the topic of sexual assault prevention.</i>
Required	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. <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 (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.</i>
Required	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. <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 (photo, email correspondence from presenter, letter from advisor, etc.). The program must cover at least 30 minutes on the topic of hazing prevention.</i>
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. <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 (photo, email correspondence from presenter, letter from advisor, etc.). The program must cover at least 30 minutes on the topic of mental health.</i>
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. <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 (photo, email correspondence from presenter, letter from advisor, etc.). The program must cover at least 30 minutes on this topic.</i>
Optional	The chapter co-hosts a substance-free social event with another campus organization.

	<i>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.</i>
Optional	The chapter creates and utilizes a policy, procedure and accountability measure to hold members and guest accountable for substance-free housing violations (if the chapter has a house/facility). <i>Submissions must include the policy, procedure and accountability process.</i>

CEP Category: Membership Development

Required or Optional	Criteria
Required	<p>The chapter hosts a substance-free chapter retreat for all members. <i>Building Better Men Retreats</i> count toward this requirement.</p> <p><i>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.</i></p>
Required	<p>At least once each month, the chapter hosts a substance-free brotherhood event or activity open to all members.</p> <p><i>Submissions must include the schedule of monthly brotherhood events/activities, participation numbers and feedback for future brotherhood programming.</i></p>
Required	<p>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.</p> <p><i>Submissions must include the needs assessment/survey, a summary of results and the percentage of participation. Submissions should also show which recommendations from the members were actually used for programs, projects, event ideas, etc.</i></p>
Optional	<p>The chapter hosts an internal discussion group for all interested members to discuss societal, cultural and/or justice-related topics or current events.</p> <p><i>Submissions must include an overview of the discussion group, topics covered, how often discussions occurred, and the percentage of the chapter that participated.</i></p>
Optional	<p>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.).</p> <p><i>Submissions must include a detailed overview of the event attended, date of the event and a list of members who attended. Attaching photos of this event is highly recommended.</i></p>
Optional	<p>The chapter hosts a cultural and/or justice-focused educational program. This may be internal for the chapter-only or open to the campus community.</p> <p><i>Submissions must include a detailed overview of the event, the date it took place, who presented and who attended. Hosting a “Taco Tuesday”-type food event does not meet the requirements of this criteria. Attaching photos of this event is highly recommended.</i></p>
Optional	<p>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.).</p> <p><i>Submissions must include a detailed overview of the event, the date it took place and who attended. Attaching photos of this event is highly recommended.</i></p>

CEP Category: Operations

Required or Optional	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. <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, and all accounts receivables paid in full each year to the International Fraternity or current on an agreed-to payment plan. <i>Submissions must include a copy of the chapter's budget, specifically highlighting the 5% emergency savings. Accounts receivables paid in full to the International Fraternity or current on an agreed-to payment plan will be verified at the end of each academic year.</i>
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. <i>Submissions must include a copy of the financial information shared with members, associate members and their families, as well as evidence of the information's distribution, such as an email screenshot.</i>
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. <i>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.</i>
Required	The chapter creates and executes a plan for keeping in touch with alumni and parents monthly/quarterly. <i>Submissions must include a copy of the alumni/family newsletter and evidence of its distribution. This may be created in conjunction with chapter alumni, but it cannot be an alumni-only newsletter.</i>
Required	The chapter establishes short- and long-term goals for each 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. It is suggested to use the SMART model when writing the goals.</i>
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> <i>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.</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. <i>Submissions must include a copy of the code of conduct and evidence that all members signed it.</i>
Required	The chapter has updated its Constitution & By-laws in the past 18 months, including the addition of substance-free housing language (if applicable). <i>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.</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 within 24 hours of 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 execute 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>

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. Attaching photos of this event is highly recommended.</i>
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. <i>Submissions must include a copy of the chapter's names list, including dates of when the names were added. Please note this is not a roster of members or associate members in the chapter; this is a list of potential new members.</i>
Required	All formal and informal recruitment events are substance-free. <i>Submissions must include a letter from the advisory board and/or campus fraternity/sorority or IFC advisor verifying that the chapter's recruitment activities were alcohol-free, along with a list of all formal and informal recruitment events.</i>
Required	The chapter has written eligibility standards for potential new members that includes the nondiscrimination policy in the Fraternity's Constitution & By-laws. <i>Submissions must include the chapter's eligibility standards, including nondiscrimination policies for potential new members that mirror those written in the International Fraternity's Constitution and By-laws.</i>
Required	The chapter has a written procedure in the chapter's By-laws for the extension of membership bids. <i>Submissions must include the procedure for the extension of membership bids from the chapter's By-laws.</i>
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.). <i>Submissions must include a detailed overview of the event, the date the event took place and who attended. Attaching photos of the event is highly recommended.</i>
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.). <i>Submissions must include a detailed overview of the event, the date the event took place and who attended. Attaching photos of the event is highly recommended.</i>
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.). <i>Submissions must include a detailed overview of the event, the date the event took place and who attended. Attaching photos of the event is highly recommended.</i>
Optional	The chapter engages alumni in recruitment efforts. <i>Submissions must include a detailed overview of how alumni are engaged in recruitment efforts. Screenshot(s) of the invitation or communication with alumni, and, if alumni attended, what their role was. Attaching photos of the event is highly recommended.</i>
Optional	The chapter utilizes social media for recruitment and regularly updates the account. <i>Submissions must include a link to social media accounts and screenshots of the specific posts related to recruitment.</i>