

STRATEGIC PRIORITY PROPOSAL

Designing DePaul Strategic Plan |

Fill out the template as appropriate for your subcommittee's initiatives. Please complete by January 19, 2026.

Initiative Title:	Advising/Retention Technology
Subcommittee:	Student Advising, Retention, and Career Outcomes Subcommittee
Date Submitted:	01/19/2026

1. INITIATIVE OVERVIEW

Key Institutional Challenges:

What are the key current or future institutional challenges that your committee is tasked with addressing?

A key institutional challenge is ensuring that holistic advising and student success structures are coordinated and equipped to consistently support student retention, persistence and timely graduation at DePaul University (complex urban education environment). As student needs continue to evolve and span across various domains (financial, academic, personal, etc.), our student success model must evolve to provide best in class, well-coordinated and data-informed support. We also aim to arrive at more developed and shared student success definitions across DePaul.

Our committee is tasked with addressing challenges related to student advising (i.e. academic, financial, wellness, career, and coaching) and the systems that work together to deliver student support. In the early stages of our work, we have identified key student advising challenges such as advisory ratios, varying college and school interpretations of policy, and different advising practices. These challenges can impact advisors' ability to identify risks in real time, engage students in timely and consistent ways—especially during critical points that we know impact retention and year-to-year persistence, and communicate effectively across colleges and non-academic divisions.

Our committee will focus on advancing the use of integrated advising and student success technology tools that improve operational efficiency, enhance cross-unit coordination, and provide actionable insights into student progress as it relates to degree completion. We believe that addressing these challenges is essential to improving student success outcomes, eliminating equity gaps, and ensuring students progress towards degree in a timely manner.

Initiative Description:

Describe this initiative and explain how it could potentially address the challenges described above.

Notes from December 15 working document:

Develop a concierge support approach to case management, recommendations, and resolutions that student success advisors (i.e. academic advisors, success coaches, financial counselors, career advisors, etc.) can consistently implement. In this context, concierge means leveraging technology to facilitate proactive outreach and holistic advising that covers academic progress, career advising (or referrals), and student success coaching (or referral). This would enhance the tools already deployed by providing clearer protocols for prioritizing outreach and coordinating the alignment of interventions across units."

Define the steps and technology needs required to create a four-year automated planning tool that gives students a clear, personalized path to degree completion. The goal is to provide a

Commented [AW1]: May want to include an introduction that indicates that we recognize that the committees may not fully be able to complete the requested information by the January 19th deadline. In those instances, ask the committee to articulate what steps it will take to gather the relevant information to allow subsequent completion.

Commented [ES2R1]: I like this! Thank you

clear roadmap to reduce time to degree, minimize unnecessary credit accumulation, reduce student debt, and help students make informed decisions about courses and sequencing.

2. SCOPE

Objectives:

List 3-5 specific, measurable objectives for this initiative.

1. Develop a culture of engagement, collective ownership, and data-informed decision making at DePaul where every faculty and staff member understands the importance of their active contributions to improving undergraduate and graduate student retention /persistence /graduation rates and overall student success across the student life cycle.
2. Review all student advising areas and practices that impact student retention and persistence. Identify misaligned core practices and principles.
3. Streamline curriculum and create a four-year automated academic advising planning tool that gives undergraduate students a clear, personalized path to degree completion.
4. Use positive outcomes of Salesforce Agent Force in financial aid and how it might inform the use of AI as an effective tool in advising other areas that directly support student success across the student life cycle.
5. Review all technology to identify areas to enhance emphasis on our DePaul culture (mission, vision, values) as our grounding principle and differentiator.

Deliverables:

What tangible outputs will this initiative produce?

- Develop student success workshops aimed at faculty and staff to advance understanding of their important role in student success with an emphasis on best practices, including the use of data and technology tools.
- Increase the percentage of faculty who submit Salesforce survey data (e.g., attendance verification and academic progress) to better identify students who may need early intervention, outreach and support.
- Train faculty and staff on new internal portals and incentivize their usage to increase engagement with support as needed.
- Complete technology audit report with cultural alignment recommendations.
- Set baseline data on student advisor workload and student satisfaction.

Out of Scope:

What is explicitly NOT included in this initiative?

Focus is on the critical roles advising (various forms) and data and technology tools play in student success. Financial aid monies and scholarships play vital roles in supporting student success, but they are excluded. For example, affordability is reportedly the number one reason why students do not persist at the undergraduate level. Student sense of community and belonging correlate with student success, but they are not directly addressed by this initiative. AACU evidence-based, high impact practices are found to contribute to increased levels of student success, but they are not directly addressed by this initiative.

Success Metrics:

How will success be measured? Include baseline data if available.

Decreased student case resolution time (see Salesforce implementation success metrics).
Depth and breadth of resources identified during evaluation period.
Increased faculty and staff satisfaction/positive reception to proposed changes

3. SWOT ANALYSIS

Analyze the strengths and weaknesses of this initiative in terms of addressing the challenges described in Section 2. Discuss internal and external opportunities and threats that will increase or decrease the likelihood of achieving stated objectives.

Commented [AW3]: in terms of the objectives stated in Section 2 above.

Strengths:

What strengths does this initiative leverage? What advantages does it have?

Culture of engagement:

- Creates a stronger community of supporting student success
- Reduces silos and improves communication

Salesforce Agent Force expansion:

- Tool is already integrated in DePaul's Salesforce investment
- Scalability

Four-year academic advising planning tool:

- Provides comprehensive roadmap for students at a glance
- Provides students with easier path to envision their academic goals and what lies ahead in an organized manner

Enhance emphasis on DePaul culture as grounding principle and differentiator: (bit unclear of how this directly factors into this initiative (apologize, but I was unable to participate in last week's meeting when this may have been discussed))

Weaknesses:

What weaknesses or limitations does this initiative face?

Culture of engagement:

- Influencing a change in culture is challenging work, and it will require buy-in and accountability across faculty and staff
- Will require change management, which is difficult to formulate and do well

Salesforce Agent Force expansion:

- Chance that Agent Force cannot be effectively adapted to advising systems
- Fear among advising teams that Agent Force would replace their jobs

Four-year academic advising planning tool:

- After years of investment and improvements in effectiveness, the DPR still has limitations and requires much maintenance to be accurate; a four-year academic advising tool might be even more challenging to reach an accepted level of effectiveness
- Cost of resources and time to develop a highly effective tool

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Opportunities:

What internal and external opportunities will increase the likelihood of this initiative achieving its goals?

Culture of engagement:

- Make an authentic cultural shift toward supporting student success across DePaul and integrate it across faculty and staff, regardless of role or unit
- Reduce silos and friction points and improve collaboration and communication across divisions and units

Salesforce Agent Force expansion:

- Provides opportunity for advising teams to focus less on typically rote, tedious activities to spend more time directly supporting students
- Improve efficiencies across departments, divisions, and units

Four-year academic advising planning tool:

- Provides opportunity for advising teams to focus less on typically rote, tedious activities to spend more time directly supporting students
- Frees up time for more holistic advising by spending less time on road mapping classes for students

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Threats:

What internal and external threats will decrease the likelihood of this initiative achieving its goals?

Culture of engagement:

- Possibility of it not gaining traction or influence
- Possibility of it not being sustainable over time

Salesforce Agent Force expansion:

- Potential unintended bias or equity issues
- Reduced relational engagement with advising teams

Four-year academic advising planning tool:

- It ends up not being effective and a waste of invested resources
- Students rely too heavily upon it and engagement with advising teams declines

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Stakeholder Feedback:

Summarize feedback gathered from relevant internal and external stakeholders that informed this analysis.

[Describe stakeholder consultation and key feedback]

We received some feedback from internal stakeholders, reflecting broad alignment around the need to strengthen advising efforts. College administrators and staff across multiple units have expressed strong interest in implementing targeted tactics that better support our students.

When addressing the need to engage in a critical review of our current practices, we will need to further interact with current advising structures.

Information Needed:

What additional information, research, or data will need to be gathered to support this analysis?

[Describe what additional evidence is needed]

We need further information on the timeline and cost of technology implementations (AI Agents and long-term planning tools)

4. TIMELINE

Fiscal Year 2026 (Current Year)

Phase / Milestone	Target Date	Key Activities
Design of the advising review process.	End of SQ'26	Collaborative design of the process.
Review of AI Agent technology	End of SQ'26	Identification of provider and roll-out schedule
Review of planning tools	End of SQ'26	Identification of provider and roll-out schedule

Fiscal Year 2027 (Planning Horizon)

Phase / Milestone	Target Date	Key Activities
Advising review process.	End of FY'27	Review and implementation of short-term recommendation
Pilot roll-out of additional AI Agents	End of FY'27	Initial implementation and assessment of pilot
Pilot roll-out of planning tool	End of FY'27	Initial implementation and assessment of pilot

Key Dependencies:

The advising review process will provide a framework for the initial application and future expansion of AI Agents and the Planning Tool.

5. PROJECTED EXPENSES & REVENUE

Describe projected expenses and potential revenue associated with the implementation of the initiative. Provide best-guess estimates on the likelihood of achieving the projected revenue.

Note: FY26 should only include expenses if any are required. We do not expect any revenue impact for FY26. Please work directly with Financial Affairs through the PMO to estimate any potential finances.

Projected Expenses

Cost Category	FY26	FY27	FY28
Audit of current advising processes and infrastructure/implement process improvements	25,000 (planning)	50,00 (executing)	TBD
Enhancement of participatory processes	25,000	15,000	TBD
Streamline Curriculum	TBD	TBD	TBD
Tech- Four Year Planning Tool (Salesforce)	\$	1M	1M
Tech- Agent Force Implementation(s)	\$	500,000	500,000
TOTAL PROJECTED EXPENSES	\$	\$	\$

Potential Revenue & Savings (FY27-FY28)

Revenue/Savings	FY26	FY27	FY28
Increased retention 1% per year		2.7M	2.7M
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
TOTAL POTENTIAL REVENUE/SAVINGS		\$	\$

Likelihood Assessment:

Provide your best-guess estimate on the likelihood of achieving the projected revenue above. What assumptions are these projections based on?

Revenue/Savings	Likelihood (High/Med/Low)	Key Assumptions
[e.g., New enrollment revenue]	[High/Medium/Low]	[What needs to happen for this to be realized?]
[e.g., Retention impact]	[High/Medium/Low]	[Key assumptions]
[e.g., Cost savings]	[High/Medium/Low]	[Key assumptions]

Net Financial Impact Summary:

[Summarize overall financial picture: total investment needed, expected returns, timeline to break even or achieve positive ROI]

6. COLLABORATORS

Collaborating Units:

Which colleges, departments, or offices will need to be involved?

Unit	Nature of Collaboration
Advising Managers' Board (AMB)	Initiative directly affects AMB's work and the work of their teams
DePaul Academic Advising Network (DAAN)	Initiative directly affects their work
Associate Deans' Council (ADC)	Initiative affects the advising teams embedded with the colleges and schools represented at ADC. Group also includes leadership from the

	Registrar's Office, Information Services, IRMA, and Student Affairs
Registrar's Office	Development of the four-year academic advising tool and expansion of Salesforce Agent Force
Information Services	Development of the four-year academic advising tool and expansion of Salesforce Agent Force
IRMA	Provide support on methods to develop to measure our success with the objectives of this initiative

External Partners (if applicable):

Salesforce
