

This document is intended to be a guided walkthrough to use for the completion of the EBD Strategic Initiative Fund (SIF) form. A video walking users through the Kualu form can also be found on the SIF website. For information on proposal eligibility, award stipulations, and the overall review process, please see the EBD Strategic Initiative Fund Overview document.

Excellence By Design Strategic Initiative Fund Request Walkthrough

1. Project Name:

Excellence By Design Strategic Initiative Fund Request (DEMO)

The Excellence by Design Strategic Initiative Fund is a one-time award to financially support the implementation of action team initiatives that drive the goals and objectives of the strategic plan.

For Kualu assistance, please contact the Technology Support Center (SupportCenter@ilstu.edu).

Submission Date

March 10, 2026

Name of Project *

Include a memorable name that could be shared out to campus.

Student Engagement AI Platform "Element Success" (Rebranded Redbird Success)

Please try to select a name for your proposal that is memorable and illustrative of what you are attempting to do. In this case, we are saying our proposed Advising AI Platform would be named "Redbird Success," once fully implemented.

2. Project Lead Information

Project Lead Information

Anchor field(s) are auto-populated and used for workflow and technical support troubleshooting.

ULID Lookup *

Use only lowercase letters.

cmrober

HCM Anchor *

cmrober

First Name Chris	Last Name Roberts	Email Address cmrober@ilstu.edu
Division Vice President Finance & Planning	Department AVP Budgeting and Planning	Unit Planning, Research & Policy Analysis

The form will auto-populate all fields with the insertion of the ULID of the proposed project lead. Please note- **the project lead will be the key point of contact** for the Strategic Initiative Fund Request and, for financial tracking purposes, will be the **direct recipient of funding** if the request is ultimately selected by the cabinet.

3. Priorities, Goals, and Metrics

New for FY27 submissions, the President's Cabinet has provided priorities for the Strategic Initiative Fund, so requestors must select one of the following six priorities that best aligns with their proposal, before selecting a corresponding goal and metric. These include:

- Improve Student retention rates
- Improve graduation rates
- Reduce DFW rates
- Accelerate time to degree completion
- Improve operational efficiency and cost savings
- Enhance program visibility and prestige

Priorities, Goals, and Metrics

FY27 proposals should support at least one of the following priorities, provided by the President's Cabinet, featured in Excellence by Design:

- Improve student retention rates (Goal IA: Champion Student Success)
- Improve graduation rates (Goal IA: Champion Student Success)
- Reduce DFW rates (Goal IA: Champion Student Success)
- Accelerate time to degree completion (Goal IA: Champion Student Success)
- Improve operational efficiency and cost savings (Goal IIA: Improve Efficiencies Across Campus)
- Enhance program visibility and prestige (Goal IIIC: Enhance Institutional Recognition)

President's Cabinet Strategic Priorities for FY27 *

Select the FY27 Excellence by Design Strategic Initiative Fund strategic priority that the proposal best fits.

Improve student retention rates

Related Excellence by Design Goal(s) *

Choose the best fit for this project.

IA. Champion Student Success

IA Metrics *

1. Increase the FTIC retention rate to 85% by 2030

Once a priority has been selected, use the drop-down function to select a the corresponding related Excellence By Design goal, and subsequent metric. In our example here, since we are making the argument that our AI platform will free up advisor time to further focus on students, we have selected the "Improve Student Retention Rates," and have subsequently tied it to goal "IA. Champion Student Success," and the corresponding metric of "Increasing the FTIC retention rate to 85% by 2030."

4. Requested Amount, Anticipated Start Date, Anticipated End Date

Requested Amount *	Anticipated Start Date *	Anticipated End Date *
\$50,000.00	July 1, 2026	May 3, 2027

For FY27, \$500,000 has been earmarked to support strategic initiatives. It is important to note that there is no minimum requirement for funding, but the intent is to look for initiatives that will have a broad impact across campus, with the potential to be “scaled up” if successful. For our example here, we have proposed \$50,000 as the cost for our AI Advising platform.

All projects need to have an anticipated start and end date, both to track progress and to ensure that initiatives fall within the bounds of the award stipulations, as well as the life of the strategic plan. All awarded funds **must be spent for the purposes expressly requested, and must be returned if not spent in full by the close of the fiscal year, June 30th, 2027.** In our given example here, we have selected that the process will start immediately at the launch of FY27, on July 1, 2026, and will be completed on May 3, 2027.

5. Define the issue/problem the proposal addresses

Define the issue/problem the proposal addresses *

Describe how it will directly support one or more of the strategic goals.

Currently our campus advisors are competing for resources and are unable to consistently meet the demand placed upon them to monitor, schedule touchpoint meetings, and interact with their students on a regular basis, while still honoring our value of individualized attention and meeting the demands of our stated strategic plan metrics. The proposal here is to purchase an automated AI based software platform, which will support our graduation and retention metrics, bolstering both our *Student Success* and *Equity, Diversity, Access & Belonging* goals, while freeing up our staff to continue to provide excellent service to our student redbirds.

All proposals have to first address what problem/issue is attempted to be solved. Submitters are encouraged to be specific, highlighting how these issues directly relate to the plan’s strategic goals. In our example here, the focus is on noting that academic advisement is struggling to meet the demands placed on them to both monitor and communicate with ISU students, while still consistently delivering our signature value of individualized attention.

6. Present the proposed solution

Present the proposed solution *

Describe how the project will address the identified problem, explaining your methods and strategies, as well as the anticipated outcome(s) and impact on campus. Who will be the beneficiaries?

Turning to an automated AI based system will free up both precious resources and staff time, while simultaneously increasing productivity. The "Student Engagement AI Platform" (tentatively rebranded as "Redbird Success") will automate traditional advising duties and tasks, including messaging, touchpoint reminders, grade tracking, and appointment scheduling; freeing up staff time and keeping our at-risk students from potentially getting lost in the shuffle/falling through the cracks. Through this method, we will concurrently be helping our staff campuswide be more productive, while actively supporting our student success goals- leading to us ultimately retaining and graduating more redbirds in the years to come.

We have already vetted software compatibility with our campus partners over in Tech Solutions and they have assured us that it can be integrated with our current student information system, Campus Solutions.

How will your initiative solve our issue/problem? What will be the results of implementing your proposal and how will it lead to a positive outcome for campus at large? Successful initiatives can draw clear correlations to how actions taken will have measurable outcomes and can easily identify who will directly benefit from implementation. In our example here, the A.I. automation frees up both time and resources, creating direct benefits for both advisement staff and the student body they serve.

7. Detail budget and funding needs

Detail budget and funding needs *

Provide a realistic, itemized, budget that addresses all project costs, including materials, training, travel, and/or other expenses. Will other funds be utilized?

From our discussions with the vendor, the initial cost of the platform will be a one-time fee of \$50,000.

Aside from the initial investment, the other "cost" to campus will be time, both to have the platform implemented and tested by our partners over in campus solutions. Tech Solutions has estimated approximately 200 hrs. of work time for this project (based on their current schedule as of this submission).

In addition, time will be needed to have our advisors and fellow staff trained up on how to utilize the functions of the platform, but that has been factored into our implementation timeline (see below details).

Details are key here, but it's more than just thinking about the dollar value of the proposal. Successful proposals will demonstrate both the ability to show financial costs, as well as the human capital component. For the example given, the cost of the software package is \$50,000, but man hours for both the implementation of our Tech Solutions partners as well as the training time for faculty and staff are estimated as well (In this case, an estimated 200 hours of project work time). Submitters are encouraged to think of the "downstream" effects of their initiatives, and are strongly encouraged to discuss concepts with campus partners before making a formal proposal.

8. Define scope and sustainability

Define Scope/Sustainability *

Provide information on whether this will last beyond the initial investment or if it will be self-funded/tied to other partnerships (e.g. software purchase that will require license renewals).

The platform does require annual license renewals. Academic Affairs can and will budget to ensure that the \$10,000 annual license renewal will be covered moving forward in perpetuity.

How is the project going to last beyond the initial investment? The SIF is designed for one-time costs, and for initiatives that will be ongoing, alternate funding or other arrangements will have to be demonstrated to remain viable. In our given example, after the one-time purchase price, our A.I. platform has an annual \$10,000 license renewal that will be absorbed as part of Academic Affairs operating budget in the coming years.

9. Define Timeline for Implementation

Time for our Tech Solutions support partners has already been factored in, estimating that the initial purchase would take place in July of 2026 and then the subsequent Summer and Fall would be used as both a period of building and testing of the process before completion in Spring of 2027. The ultimate goal is to have everything in place for a campuswide launch in Fall of 2027.

Rough Timeline Outline:

Summer/Fall 2026:

- July: purchase goes through, Tech Solutions begins implementation
- September: per Tech Solutions provided schedule, end user DEV testing can begin
- December: per Tech Solutions Schedule, end user DEMO testing can begin

Spring 2027:

- January: per Tech Solutions schedule, end user PROD testing can begin
- January-April: Designated advisor trainings begin – workshops, walkthroughs, resource guides are held/provided
- May: All aspects of the platform go live

Fall 2027:

- Campus-wide launch

Successful proposals have strong timelines that can address when and how steps will be implemented – covering both how the funds will be spent during the fiscal year, and then thinking beyond, how results will be measured across the life of the strategic plan. In our example here, upon being approved, the purchase and work will be done in the summer and fall of 2026, with testing and campus training factored in for the following spring, before having a full official launch in the fall of 2027.

10. Assessment

Assessment *

Provide information on how the project will be assessed. Describe how project success will be measured.

Post launch: the estimated ROI for the first year has been calculated to equal the work of 26 FT staff, saving the University:

1. An estimated annual 216,000 conversations (text, emails, calls)
2. An estimated annual 54,000 staff hours
3. An estimated \$3.8 million in tuition uplift

Beyond these milestones, we should then see positive indicators in our metrics as more student concerns are addressed. Through both the use of our AI platform and the reallocated time for our advisors to provide individualized attention to our redbird students, the end result should see both our retention and graduation rates improve through this process.

A new field to the SIF form, “assessment” is asking the submitter to explain how the project and its subsequent success will be measured. What key performance indicators (KPIs) will be utilized and/or how will campus know that the project is delivering a return on investment (ROIs)? In our example here, the proposal will be measured in several ways, including counts of communications, staff time, and overall tuition measurements (see, student retention). This would then be tracked along with monitoring our correlating retention/graduation rates as dictated by the strategic plan’s metric goals.

11. Abstract/Executive Summary

Abstract/Executive Summary *

Provide a brief summary (500 characters maximum) of your proposal based on the information provided above.

The Student Engagement AI Platform (Redbird Success) will automate key advising tasks—messaging, reminders, grade tracking, and scheduling—to free staff capacity, improve efficiency, and better support at-risk students. With a \$50,000 initial investment and seamless SIS integration, the project enhances student success, retention, and equity goals while enabling significant long-term ROI and sustainability.

Another new field to the SIF form, “Abstract/Executive Summary” is the overall summation of the fields listed above, condensed down to a brief, character limited, proposal. This is the “elevator pitch” for the proposed initiative and will be used as an identifier to aid the President’s Cabinet in deliberations. Successful summaries will succinctly lay out the problem, the proposed solution, and how it will overall help/impact the University.

12. File Upload

File Upload

Upload up to five (5) documents.

Attachment

Please provide attachments that would assist in the review of this proposal.

No file attached

Same as before, the SIF form allows submitters to upload up to 5 documents to help illustrate their proposal. Correlating research, budget data, charts, etc. are all encouraged to help strengthen and support their initiative.

13. Steering Team Review

Steering Team Review

Steering Team Comments

Just as before, this section is for feedback from the Steering Team to ask questions, suggest alterations, share feedback from the VP's, etc. Initiatives that do not meet the posted SIF eligibility/award stipulations may be "returned" or "denied" here.

14. President's Cabinet Review

President's Cabinet Review

Review Status *

Proposals that make it through to Cabinet review will have a review status to show if the initiative has been "Approved" or "Denied" by the end of the process.