Trainings and Professional Development for Practitioners

Part 1 of the Webinar Series for Project Success Institutions

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Overview

- Practitioner Trainings
  - Customer Service
  - Enrollment Management Dashboard
  - Using Data to Support Students
  - Communication Consulting and Campaign Development
  - Stop Out/Re-Engagement
  - Default Aversion
  - Website Optimization for Student Communication
  - Supporting Students with Disabilities
  - Advising, Case Management, and Engagement

Customer Service Training

- Customer Service Part 1
  - This interactive session focuses on the importance of customer service in higher education
  - Identifies the core "promise" of the institution
  - Outlines 5 essential values that create sustainable customer service
  - Good for staff and faculty alike
  - 1.5 hours

- Customer Service Part 2
  - This session is designed as a follow-up to part 1 (can also be stand-alone)
  - Covers more specific strategies such as phone and email etiquette
  - Like Part 1, discusses the "why" of customer service and sustainability
  - 1.5 hours

Enrollment Dashboard Training and Planning

Training and Consulting

- This interactive session examines the institution's enrollment management performance and looks for areas to increase conversion from inquiry to enrollment

- Creates a simple "dashboard" the team can use to track performance on a regular basis

- Participants should include stakeholders in the process of onboarding new students (admissions, financial aid, marketing, student accounts, housing, first year experience, etc.)

Enrollment Dashboard Training and Planning

Includes enrollment steps, goals, timelines, student counts, progress indicator, and responsible staff member.

Enrollment Step	Final Goal	Start Date	End Date	How many as of 7/2/2021	How Many Should We Have as of Today	Number to Go		Staff Member Responsible
Inquiries	**12,477**	9/1/2020	5/31/2021	5,800	12,477	6,677	Behind	Dexter
Applications	**3,244**	9/1/2020	5/31/2021	3,800	3,244	0	On Target	Frances
Completed Applications	**2,757**	9/1/2020	5/31/2021	2,500	2,757	257	Behind	Ron
Application + transcripts + test Scores								
Students Admitted	**1,875**	12/1/2020	5/31/2021	1,450	1,875	425	Behind	Ron
Steps to Yield								
# of newly admitted students with ISIR	**2,757**	10/1/2020	9/30/2021	3,200	2,076	0	On Target	Barb
# of ISIRS selected for verification	No Goal - Information Only							
# of new students awarded for Fall 2021	**1,875**	1/1/2021	8/31/2021	1,100	1,410	310	Behind	Barb
# students paid confirmation free	**827**	4/1/2021	8/30/2021	900	504	0	On Target	Joe
# student registered	**600**	8/1/2021	9/1/2021	0	0	0	On Target	Nicole
# matriculated	**600**							

Best Practices with Data Training

- Data Training with Trellis
  - This training is meant to give an overview of the overall process of providing data for the campaigns that Trellis runs for our institutions
  - Going over a check list of what needs to be done before uploading their data file to Crush FTP
  - Talking about what happens when good or bad data is uploaded

- Best Practices with Data/Reports from Trellis
  - This session will provide examples of how institutions have used our data reports to guide their strategic planning
  - Additionally, how institutions can utilize their own data for a range of projects

- Data Systems and Visualization Trainings
  - Trellis consultants can assist practitioners with data systems and visualization including:
    - Microsoft Excel, Tableau, SQL, GradSnap, Banner, Slate, Oracle, Peoplesoft, R, and Python.

Communication Consulting and Campaign Development

Communication Consulting

- Enrollment, Financial Aid, Retention, and Stop Out Communication Plan Development
- Communication flow based on your Institution's Academic Calendar
- Text Messages, Phone Calls and Print Integration
- Institutional Internal Department Collaboration
- Visual Communication Plan Template

Campaign Development Text Messaging Best Practices

Write Effectively	Content Development
Do No Harm	Use Smart Messages
Set Expectations	Inbox Management

Communication Examples

Hi *first name*! This is Trellis University. We'll text you important info to help you stay on track this semester so save this number. The FAFSA is now open. Fill it out today using school code 000000. STOP = end msgs. Do you need the link to submit your FAFSA? (Please reply yes or no)

Y: Here it is: https://studentaid.gov/h/apply-for-aid/fafsa

N: Thank you for letting us know. Text us back if you change your mind.

Hi *first name*! As this busy semester comes to an end, only finals stand between us and a summer break! Before finals arrive and the procrastination sets in, we have some ways to prevent procrastination to help you stay on top of your to-do list. Do you want to learn more? (Please reply yes or no)

Y: Go here: collegeinfogeek.com/beat-procrastination-with-pomorodo-technique/

N: Thanks for letting us know. Text us back if you change your mind.

Hi *first name*! We miss you at Trellis University! Did you know you are less than 12 credits away from graduation? You are close to the finish line, and we want to help you get there! Reply STOP to end messages. Are you ready to re-enroll at TU? (Please reply yes or no)

Y: We're excited to hear that! Registration begins 3/15. Make an appointment with your advisor here: mytrellis.edu. Contact the Office of Admissions at 000-000-0000 if you have any questions.

N: Are you sure? This can be a tough process but you're not alone. Talk to a coach to discuss your academic and financial plan: https://www.mosaiec.org/coaching/

Message to Institutions: Reclaim Your Students!

Stop-Out/Re-Engagement Services

- Student enrollment has gradually declined in recent years, but the decline doubled in Fall 2020 compared to Fall 2019, and enrollment of new high school graduates fell by nearly 22%. Retention and re-enrollment of stopped-out students are more critical than ever.

- Trellis can provide strategies to help your institution launch a successful Stop-Out campaign to re-enroll stopped-out students. **We're here to serve and support your retention and graduation efforts.**

Stop-Out Consultation Services

Stop-Out/Re-Engagement Services

- Institution Assessment
  - 1 hour, depending on audience
- Institution Stop-Out Strategic Plan
- Stop-Out Student Survey Development & Research
- Stop-Out Campaign Launch
- Stop-Out Implementation Checklist
- Develop a Customizable Checklist for Students
- Stop-Out Follow-up
- Consortium Options (Trellis will pay membership fee** use Trellis services)

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Stop-Out Campaign and Checklist

Sample Stop-out Campaign

Msg #	Send Date	Context/Audience	Content	Notes/Questions	Data Upload Deadline	Data Rcvd
1	2/7	Topic: Intro Audience: Near degree completers (12 credit hours or less to completion)	Hi *first name*! This is *institution name*. Reply STOP to end messages. Did you know you are less than 12 credits away from graduation? You are close to the finish line and we want to help you get there! See email for more information. Ready to re-enroll? (Please reply yes or no). Y: We're excited to hear that! Registration for Fall 2020 begins *date*. Make an appointment with your advisor here: *URL*. N: Are you sure? This can be a tough process but you're not alone. Talk to a coach to discuss your academic and financial plan: www.aie.org/coaching/.		2 days prior to send date	N
2	2/7	Topic: Intro Audience: Students with more than 12 credit hours remaining	Hi *first name*. We miss you here at *institution name* and want to help you complete your college degree. Reply STOP to end messages. See email for more info. Ready to re-enroll? (Please reply yes or no). Y: We're excited to hear that! Registration for Fall 2020 begins *date*. Make an appointment with your advisor here: *URL*. N: Are you sure? This can be a tough process but you're not alone. Talk to a coach to discuss your academic and financial plan: www.aie.org/coaching/.			N
3	3/7	Topic: Stop-out Audience: All stopped-out students	Hi *first name*! It's not too late to finish your degree! Sign up for classes NOW. The deadline to register for Fall 2020 is *date*. Need to chat with someone? We're here! Text back.			N

PO Box 83100 | Round Rock, TX 78683 | www.trelliscompany.org | (800) 252-9743 | (512) 219-5700

SCHOOL NAME HERE
STUDENT RE-ENROLLMENT CHECKLIST
optional URL here

We can't wait to see you again!
Make sure you have the following in order if you are enrolling at [school name].

☐ **Welcome Back**
- Review Welcome Back Packet
- Orientation Date

☐ **Reactivate Enrollment**
- Contact (website, email, point of contact)
- Submit Application
- Fee (Waived)

☐ **Financial Aid and Financial Resources Plan**
- Department contact, website, email, phone
- Complete FAFSA
- FAFSA Completion Webinar Opportunities (Dates)
- For assistance, please contact:

☐ **Housing**
- Department contact, website, email, phone
- Submit Application
- Deposit Fee
- Deadlines
- Confirm Housing and Move-in Date

☐ **Meet with Academic Advisor**
- Department contact, website, email, phone
- Schedule an appointment (website, link)
- Review and confirm your degree plan
- Academic and Career Goal Setting
- Ask about financial and academic resources

☐ **Register for Classes**
- Department contact, website, email, phone
- How to register (links)
- Registration Deadline

☐ **Take Advantage of Student Resources**
- Scholarships
  (Department contact, website, email, phone)
- Academic Advising
  (Department contact, website, email, phone)
- Tutoring
  (Department contact, website, email, phone)
  - Group
  - One-On-One Tutoring
- Campus and Community Resources
  (Department contact, website, email, phone)
- Campus Organization Involvement
  (Department contact, website, email, phone)
- Career and Internship Opportunities
  (Department contact, website, email, phone)
- Community Service Learning Opportunities
  (Department contact, website, email, phone)

Contact Office
Email: insertemailhere.edu | Phone: (000) 000-0000
71281

SCHOOL LOGO HERE

Default Aversion

Trellis will help institutions manage default by providing the following:

- Assistance with managing students in all active CDR cohorts
- Contact students in the grace period
- Contact students past due
- Emailing monthly status reports
  - A monthly report is provided to institutions that details
- Producing AdHoc reports to assist with internal outreach initiatives
  - Students who are in late-stage delinquencies and are on the verge of defaulting
  - Students who have defaulted who may be eligible for Rehabilitation
- Understanding CDRs
  - What is a Cohort Default Rate
  - How The CDR is calculated
- Performing CDR analysis
  - Trellis can develop a cohort default rate analysis and borrower risk assessment
  - Trellis must be able to download NSLDS loan information files on behalf of the institution
  - Designated Trellis staff will need to be authorized by the institution as secondary Destination Point Administrators (DPAs)

Website Optimization for Student Communication

Training and Consulting

- Website Optimization:
  - Includes reviewing website for flow for student-focused communication, reorganization of menu scheme
  - Alignment with marketing and branding standards
  - Alignment with breadcrumb pages to ensure consistency
  - Reviewing HTML/CSS code for accessibility for students with disabilities
  - Analyzing readability levels to ensure simplicity for students

  - Can be completed using free software

  - Depending on scope of project and size of website, first meeting takes 1-2 hours and then a series of 3-4 sessions of 3-4 hours each.

Supporting Students with Disabilities

Training and Consulting

- We can help with auditing your communication to make it more accessible for students with disabilities.

- Training includes how staff can use free software for accessibility including the Microsoft suite, Adobe suite, and PAC3 for PDF/UA compliance.

- By the end of the training, your staff can address websites, Microsoft/Adobe files, emails, and other forms of communication for accessibility for students with disabilities.

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Engagement Strategies that Empower Students

Training and Consulting

- ## Academic Advising
  - Academic advisors and counselors will learn:
    - How to engage students through holistic advising and provide timely support for students in need
    - Strategies for maximizing case-managed/ assigned advising to empower students with critical information through strategic outreach
    - Ways to empower students to make informed career decisions and analyze transfer options through financial coaching

- ## Student Success and University Seminar Faculty
  - Faculty teaching student success and first-year experiences courses will learn:
    - How to incorporate iGrad and other Trellis resources into their curriculum
    - Strategies to help students develop financial literacy
    - Ways to empower students to make informed career decisions through financial coaching

Thank You! And Contact Us

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