
What They Need, When They Need It: Interactive Student Sessions from Trellis

Part 2 of the Webinar Series for Project Success Institutions

Presenters:

Richard Sapp, Melanie Odums, Beth Landrum, and Zach Taylor



Guiding Questions

Student
services and
presentation

- What events could your students benefit from that you do not currently offer?
- Do your financial wellness/career services/student affairs offices provide virtual or hybrid events?
- What events are popular on your campus?

Overview

- Student Sessions
 - FAFSA Completion Nights – Richard
 - Student Financial Education Events – Beth/Melanie
 - iGrad Launch Parties – Richard
 - Understanding Your Financial Aid Offer - Zach
 - Career Services Events – Zach
- **All services and events are FREE for students, faculty, and staff at your institution.**
- **All events can be hosted virtually, in-person, hybrid, and/or cross-streamed on Facebook Live.**



FAFSA Completion Nights

- Trellis can host FAFSA Completion Nights for your students.
- 50 minutes for content and 10 minutes for Q&As.
- Our professionals review the entire FAFSA, including answering questions on:
 - FSA ID and password retrieval
 - Family size and dependency/independency
 - Connecting the IRS data retrieval tool
- We build the Zoom webinar and can handle communication via text message to invite students.
- Questions fielded in real-time.
- Event can be customized for different student audiences.
- We provide follow-up reporting, including registration lists.

Student Financial Education Presentations

- Virtual – Deliver an overview of different financial literacy topics; ex: Budgeting, credit, debt management, savings, financial aid, and student loan repayment.
- 45 minutes + 15 minutes for Q&A or longer sessions depending on student audience.
- Sessions can also be conducted in small group settings for certain student populations and topics.
- When discussing plans for fall retention and student programming, please connect with your ISC to learn how to schedule these sessions and integrate them into your communication plans.
- We can help you promote over text, social media, and digital/print flyers.

Financial Coaching Opportunities

- During larger group sessions, students can ask questions and if they require one-on-one assistance, they can set up an appointment to meet with a financial coach.
- Students can meet with a one-on-one coach multiple times if follow up is required.
- On average, each session lasts 60 minutes—some sessions run 30 minutes or fewer.
- Our goal: by the end of the session, students are more equipped with knowledge and skills to manage their finances, have resources to help them reach their goals, and make better financial decisions.
- Coaching appointments can be made at www.mosaiec.org/coaching.

Financial Wellness Wednesdays

Student Session and Staff Training

- Starting September 16st, 2021
- Webinar series on the 1st and the 3rd Wednesday of each month, tentatively between 4pm-5pm central.
- Our financial coaches will discuss a different financial wellness topic in detail—these events are open to all students, faculty, and staff.
- We build the Zoom webinar and can handle communication via text message to invite students.
- Questions fielded in real-time.
- Event can be customized for different student audiences.
- We provide follow-up reporting, including registration lists.



iGrad Launch Parties

- Trellis can host iGrad launch parties for your students.
- 40 minutes of content, 15 minutes for a financial literacy trivia game, and 5 minutes for Q&A and wrap-up.
- Our professionals review the major features of iGrad, including:
 - Topics (credit, moving, etc.)
 - Courses ('Budgeting for Higher Education,' etc.)
 - Tools (job finder, scholarship finder, etc.)
- We build the Zoom webinar and can handle communication via text message to invite students.
- Questions fielded in real-time.
- We provide follow-up reporting, including registration lists.

Understanding Your Financial Aid Offer

Student Session and Presentation

- Trellis can host financial aid offer information sessions for your students alongside your financial aid/advising staff.
- 40 minutes of content, 10 minutes for a ‘test your knowledge challenge,’ and 10 minutes for Q&A and wrap-up.
- Our professionals review the key terms of financial aid offers, such as:
 - Cost of attendance
 - Direct and indirect costs
 - Loan, scholarship, and grant types
- We build the Zoom webinar and can handle communication via text message to invite students.
- Questions fielded in real-time.
- We provide follow-up reporting, including registration lists.



Career Services Events

- Trellis can host career services sessions for your students.
- 45 minutes of content, 15 minutes for Q&A and wrap-up.
- Our professionals cover basic career services topics, such as:
 - Resume writing and review
 - Managing your online brand
 - Dressing for success and nailing the interview
 - Using iGrad for student career services
- We build the Zoom webinar and can handle communication via text message to invite students.
- Questions fielded in real-time.
- We provide follow-up reporting, including registration lists.

Questions, Discussions, and Contact Information

- **Follow up questions:**
 - Are there events that your students could benefit from?
 - Where are your institution's student service gaps?
 - Do your financial wellness/career services/student affairs offices provide virtual or hybrid events?
 - Can your institution provide social media assistance to allow for Facebook Live streaming?

- Has any institution hosted a different event with success?

- Contact information:
 - Richard Sapp (Richard.Sapp@trelliscompany.org)
 - Beth Landrum (Beth.Landrum@aie.org)
 - Melanie Odums (Melanie.Odums@aie.org)
 - Zach Taylor (Zach.Taylor@trelliscompany.org)