



Student Financial Wellness Survey (SFWS)

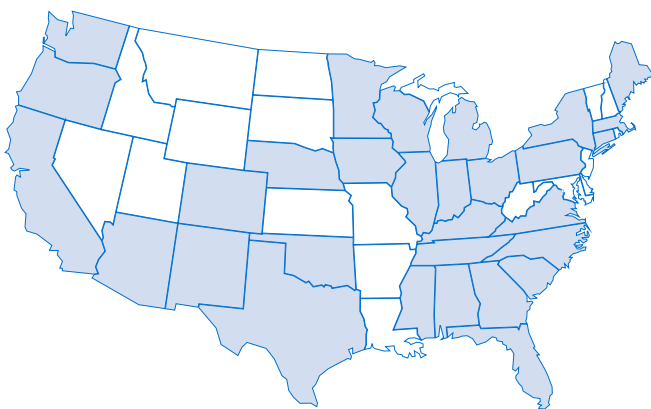
How Results Empower Student Success Innovation

WHY PARTICIPATE?

To more effectively address the financial challenges that drive student enrollment decisions. Uncover the specific financial wellness issues that are making it more difficult for your students to reach their educational potential.

Who has participated in previous surveys?

Trellis has surveyed over 2 million students at 187 schools in 30 states.



What do participating schools receive?

- A 30-40 page report with detailed narrative, graphs with peer group comparisons, tables, technical supplement, and research-to-practice recommendations.
- A one-page infographic
- Access to ad hoc reports
- Presentation of results to your leadership team
- Opportunity to cross reference with outcome metrics 6-9 months later

What topics are covered?

- Paying for college
- Student debt, credit card use, and risky borrowing
- Higher education financial decision-making
- Financial behaviors
- Student financial security
- Basic needs security
- Mental health
- Special topics

How Schools are Using their Results to Drive Student Success:

- Expanding outreach to students about money management programming and resources
- Exploring options to reduce textbook costs
- Fundraising for an emergency aid fund
- Enhancing student wrap-around supports
- Advocating for changes to student policies
- Developing new partnerships with external groups to support students
- Applying for and receiving student success grants
- Informing and driving planning and budget processes
- Decreasing the stigma around use of assistance, such as food banks and basic financial security resources



TESTIMONIALS

REMOVING BARRIERS TO STUDENT SUCCESS

“This survey is critical to our goal of removing as many non-academic barriers as possible.

Susan Guzman-Trevino

Provost/Vice President of Academic Affairs and Student Services, Temple Junior College, Temple, Texas

CAMPUS-WIDE IMPROVEMENTS THROUGH INFORMED STRATEGIC PLANNING

“The Student Financial Wellness Survey has been a great resource for Palo Alto College. It has provided our entire community with strong research documenting the extent to which our students are struggling financially. We are already using the findings from the survey to inform our strategic planning and better support our students.

Katherine Doss

Vice President of College Services

Palo Alto College, San Antonio, Texas

SIMPLE AND SMOOTH PROCESS

“The experience working with Trellis was a very simple and smooth process. The data and perspective we received on students' financial wellness is extremely valuable. This information will improve the Financial Learning Ambassador programming on all six Valencia College campuses. We are extremely grateful for this opportunity to ask crucial financial wellness questions to our students.

Ilia Cordero

Assistant Director of Financial Aid

Valencia College, Orlando, Florida

TRELLIS IS A TRUE PARTNER

“Trellis has provided a tremendous service through the Student Financial Wellness Survey. Trellis provided tremendous support through each phase of the survey's administration. The Student Financial Wellness Survey report that was produced for New Mexico State University provided an in-depth analysis of key findings and recommendations that will provide us not only the insight of the challenges to success our students are encountering, but also recommendations on how to address barriers to student success. Trellis has been a true partner and we plan on continuing our common interest of working toward student success.

Tony Marin

Assistant Vice-President, Student Affairs, New Mexico State University, Las Cruces, New Mexico

PROMPT, RESPONSIVE SUPPORT TO INSTITUTIONS

“The Trellis team was a pleasure to deal with, responding to clarifying questions throughout the planning and implementation process for the Student Financial Wellness Survey in a very timely manner as well as going above and beyond to provide documentation and supplemental information to help inform decision-making about the implementation across our institutions.

Andrea Pellegrini
Assistant Director, USFSCO Student Money Management Center
University of Illinois System, Urbana, Illinois

SEAMLESS PROCESS TO PARTICIPATE

“SRSU [Sul Ross State University] appreciated the opportunity to partner with the Research Team at Trellis to assess our students' financial needs and concerns. The implementation led by Trellis was seamless. The results provide us with data to offer programs and interventions to positively impact our students' lives and ultimately their success in achieving their goals at our institution.

Jeanne Qvarnstrom
Assistant Vice President for
Institutional Effectiveness
Sul Ross State University
Alpine, Texas

INFORMING INSTITUTIONAL LEADERS

“It was an easy process to start the SFWS on campus. All the information was provided for our review board members to review for approval. One of the greatest benefits besides the actual data from the survey, was that Trellis was able to contact our students on our behalf; which saved us all the time and effort that involves in sending out communication to our students.

Pedro Tijerina
Student Services Coordinator, Our Lady of the Lake University, San Antonio, Texas

TARGETING IMPROVEMENTS TO ADDRESS SERVICE GAPS USING CUSTOMIZED RESULTS

“The Trellis Student Financial Wellness Survey provided pertinent information as it relates to the students on OUR campus, not a combination of campuses regionally or nationwide. The Trellis SFWS is a great data tool that can be used by campus leadership to show student needs and gaps in services. As a result of the SFWS, we have been able to better target areas/resources that students said were important from their perspective such as food insecurity, mental health, and financial literacy.

Kimberly Lowery
Financial Aid Specialist, Southeastern Community College,
Whiteville, North Carolina



FREE AND BENEFICIAL

“Thank you for providing this free and extremely beneficial service to institutions. We sincerely appreciate your support of financial well-being on college campuses.

Nick Kilmer
Lecturer, Dean's Office, Texas A&M University,
College Station, Texas

REDUCING STUDENT FINANCIAL STRESS THROUGH FINANCIAL EDUCATION CURRICULUM CHANGES

“The Trellis' Student Financial Wellness Survey has provided us valuable information that is helping us to improve our activities so that we will be covering material that may be causing stress to our students.

Mary Ballard
Administrative Staff Assistant,
State University of New York Oneonta,
Oneonta, New York



To learn more about participating in the free Student Financial Wellness Survey

Contact Trellis Research:
trellisresearch@trelliscompany.org

Visit online at:
trelliscompany.org/SFWS

About Trellis Research

Trellis Research provides colleges and policymakers insight into student success through the lens of college affordability. With more than three decades of experience on the forefront of issues such as student debt, student loan counseling, and financial barriers to attainment, our research team continues to explore the role of personal finance and financial aid in higher education.

About Trellis

Trellis Company (www.trelliscompany.org) is a nonprofit 501(c)(3) corporation focused on helping people leverage the power of post-secondary education and learning to improve their quality of life and the communities where they live.