



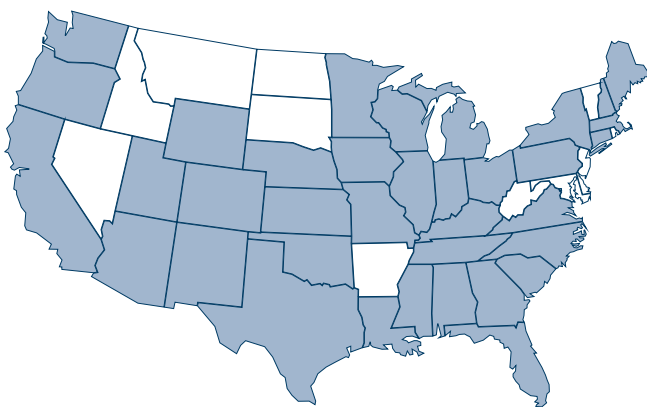
## Student Financial Wellness Survey (SFWS) HOW RESULTS EMPOWER STUDENT SUCCESS INNOVATION

### 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 3.8 million students at 300 schools in 37 states.



### What do participating schools receive?

- A customized 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
- A de-identified data file containing select demographics and survey responses from the school's students
- Presentation of results to your leadership team
- Opportunity to cross reference with outcome metrics one year later

### What topics are covered?

- Paying for college
- 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*

#### 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*

“ Trellis made the SFWS process so seamless. I greatly appreciate their willingness to conduct this research on our campus, and I look forward to how we can learn and grow from the information that students provide. It is my hope that this understanding will lead us to better serve the needs of our student body and to match those needs with appropriate support services, both on campus and in the greater community.

*Jonathan Loss  
Dean of Enrollment Management  
Catawba Valley Community  
College, Catawba, 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 Student Financial Wellness Survey has provided our school's financial wellness/literacy program with detailed information that we are actively using to improve our program to better benefit our students. Looking through the information provided has helped us to find areas of improvement that we otherwise might not have had access to.”

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

## TRUSTWORTHY AND PRACTICAL INFORMATION

“ Thanks to Trellis' Student Financial Wellness Survey, we now have trustworthy and practical information that accurately reflects our students' financial well-being.

*Deonna Davis  
Associate Director of Financial Aid  
Herzing University, Milwaukee, Wisconsin*

## 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 sending out communication to our students.

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



## About Trellis Strategies

Trellis Strategies is a leading nonprofit strategic research and consulting firm focused on advancing postsecondary education and strengthening the workforce. Our commitment is to provide unparalleled insights into the modern learner experience, spanning from application through graduation. Leveraging over four decades of experience in serving higher education institutions and assisting students in navigating intricate processes, Trellis Strategies' dedicated team possesses the knowledge, insight, and expertise to empower organizations to turn data into impactful action and tangible results.

As experts in gathering and analyzing both local and national data, we identify opportunities and provide scalable, tailored solutions for our partners. Our approach involves the transformation of institutions through the enhancement of the learner experience leading to higher enrollment yields, retention rates, and improved student post-graduation outcomes.

Guided by our mission, we navigate the non-linear landscape of postsecondary education, assisting institutions in adapting policies and programs to accommodate diverse learner journeys. By dismantling barriers in policy and processes, we aim to enhance learner outcomes and rebuilding trust in the credentialing process. We are dedicated to the belief that education serves as the cornerstone for unlocking new opportunities, fostering individual economic mobility, and growing community prosperity. For more information, visit our website:

[www.trellisstrategies.org/about-us/](http://www.trellisstrategies.org/about-us/)