

Session #PLS3A

Trellis Project Success

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Trellis Company

About Trellis

- Nonprofit 501(c)(3) student loan guarantor with 40-year record of delivering positive outcomes for student borrowers
- Guaranteed over \$74 billion in loans to more than 4 million student borrowers and their parents
- Borrower satisfaction of 4.38/5 (3-year avg.)
- Default prevention cure rate of 89.2%, with \$2.1 billion in potential defaults averted
- Claims rate accuracy of 99.9%
- Exemplary audit and compliance history
- Nationally recognized research and analytics



Trellis Project Success Footprint



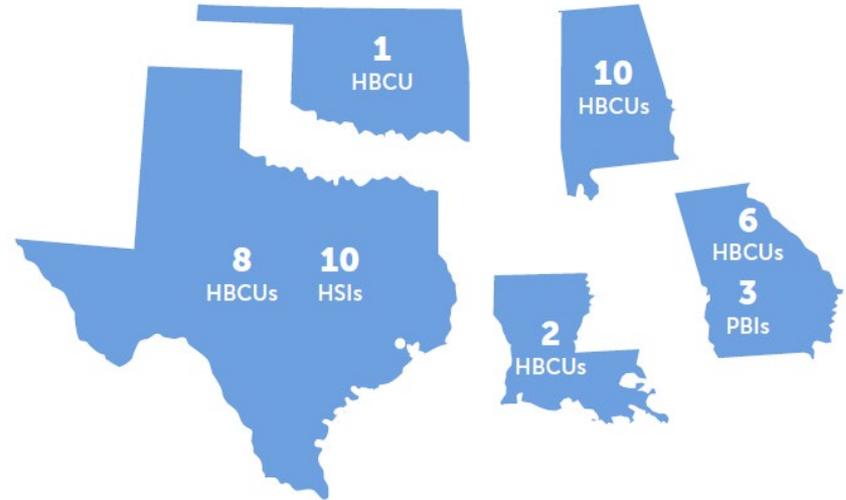
40 INSTITUTIONS IN 5 STATES



306,000 STUDENTS ANNUAL ENROLLMENT



27 HBCUs; 10 HSIs; 3 PBIs



Student Facing Services



**MOBILE-FIRST MESSAGING
CAMPAIGNS**



**FAFSA AND VERIFICATION
COMPLETION SUPPORT**



STOP-OUT ENGAGEMENT



SUMMER MELT



OUTBOUND CALL SUPPORT



DEFAULT PREVENTION



STUDENT COACHING



IN PERSON / ONLINE FINANCIAL LITERACY

Institutional Support Services



RESEARCH AND ANALYTICAL SERVICES

- Retention Profiles
- Student Financial Wellness Survey
- CDR Analysis
- Exit Surveys



STAFF AND FACULTY PROFESSIONAL DEVELOPMENT

- Customer Service Training
- Retention Analysis and Best Practices
- Student Financial Wellness Briefings
- Communication to Students Training



INSTITUTIONAL POLICY, PROCEDURE, AND PROCESS CONSULTING

- Enrollment Management Strategic Planning, Dashboard
- Stop-Out Engagement
- Communicating Financial Clearance, Financial Aid Offers



COMMUNICATION CAMPAIGN DEVELOPMENT

Service Offerings

RESEARCH SERVICES

50,000+
STUDENTS

PARTICIPATED IN THE
STUDENT FINANCIAL WELLNESS SURVEY
SPRING 2018, FALL 2018, & FALL 2019

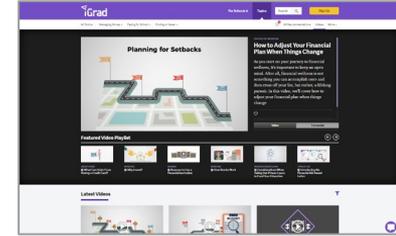


128 institutions in 28 states

FINANCIAL EDUCATION

52,000+
ONLINE MODULES

COMPLETE SINCE INCEPTION



MOBILE COMMUNICATION SERVICES

TEXT MESSAGES SENT



Service Offerings

DEFAULT PREVENTION SERVICES

TRELLIS CONTACTS AN AVERAGE OF

6,766
GRACE PERIOD
AND
20,482
DELINQUENT

STUDENT LOAN BORROWERS EACH MONTH



VIRTUAL COACHING AND OUTREACH

THE COACHING TEAM MADE OVER

40,000 OUTREACH
CALLS

FOR COLLEGES ON TOPICS SUCH AS RE-ENGAGING
STOP-OUT STUDENTS, LOAN VERIFICATION,
AND SPECIAL TERM ENROLLMENT



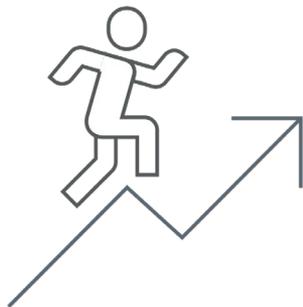
500 VIRTUAL ONE-ON-ONE
COACHING SESSIONS

WITH STUDENTS ON GOAL SETTING, BUDGETING, AND
UNDERSTANDING FINANCIAL AID AND STUDENT LOANS

Case Studies and Highlights

Examples – Text Message Outreach

LARGE 4-YEAR PRIVATE INSTITUTION



Summer 2018 summer text outreach –
Increased summer enrollment by approximately
2.5% (600 students) from prior year

.....

Fall 2018 housing text messaging campaign supported
increase in housing occupancy – 56 more students,
achieving a 97% occupancy rate

.....

Fall 2018 texting increased the number of
UNCF recipients by 31% over prior year

.....

Increased attendance at Career Fair by
41% over prior year

Examples

COMMUNITY COLLEGE SYSTEM



Spring 2019 registration campaign – Trellis sent 2,257 text messages and made 2,697 phone calls to inform students of payment deadline

2,000 student improvement in the number who remained registered for the term vs. two prior years

COMMUNITY COLLEGE CAMPUS

Fall 2018 re-enrollment campaign – Trellis calls resulted in 113 stopped-out students re-enrolling at the college



Questions and Answers