

33<sup>rd</sup> National College & University  
**Bursars SFS Conference**

San Antonio, TX Mar 31 - Apr 3, 2019  
Hyatt Regency San Antonio Riverwalk

MONDAY, APRIL 1 • 10:00 - 11:00 AM

### **Growth of Financial Wellness and Its Need in Higher Education**

*Bryan Ashton, Trellis Company & Phil Schuman, Indiana University*

Over the past 20 years, there have been significant changes to ways that individuals finance their college education. These changes have led to increased costs and resulted in record levels of student, and parent, borrowing. This has spawned a new set of stressors affecting the wellness of the students we interact with. Due to the increased financial burden, the need for student financial education is now greater than ever and is being addressed at universities across the country. In this session, we'll examine the current state of financial wellness across the country, as well as research and tools that are leading the way toward a more well student. Attendees can expect to begin a strategy for providing financial wellness resources -- or consider ways to enhance their current efforts in this area. This session will conclude with a question and answer period and time for reflection and sharing.

Learning Objectives

- Identify prominent issues facing schools and potential impacts of a financial wellness program
- Review relevant research that indicates the struggles many students across the country are facing as a result of finances
- Develop a plan to enhance current financial wellness efforts on campus

MONDAY, APRIL 1 • 11:15 AM - 12:15 PM

### **Research to Practice: Student Financial Wellness Survey**

*Bryan Ashton, Trellis Company & Nick Kilmer, Texas A&M University*

Trellis' Student Financial Wellness Survey (SFWS) seeks to document the financial well-being of post-secondary students and provide institutions with a detailed profile of the financial issues their students face, some of which could potentially impact their success in college. In this session, presenters will share findings from this survey. Nick Kilmer from Texas A&M University, will lead discussion around the implications of the findings for practitioners.

Learning Objectives

- Be exposed to emerging research on financial wellness issues facing students
- Be able to use data to spark discussions about the interrelation between financial wellness and student success on campus
- Engage in discussion with other practitioners about using data to inform financial wellness programming

MONDAY, APRIL 1 • 1:15 - 2:15 PM

### **Financial Triage: A Student Success Story**

*Paul Goebel, University of North Texas*

Financial Triage is the process of identifying financial resources and prioritizing options for students by providing immediate access to staff representatives who have the authority to provide answers and support. We will explore a new retention initiative being piloted by the Student Financial Services, Student Money Management Center, Dean of Students, and Student Financial Aid & Scholarships Office at the University of North Texas. Learn how these offices are working more collaboratively to better serve students in need. Get the money stat!

Learning Objectives

- Recognize key support components of a financial triage initiative
- Identify a plan to create a financial triage collaborative initiative for your students

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MONDAY, APRIL 1 • 2:45 - 3:45 PM

## **Birds of a Feather: Improving the User Experience in Your Financial Education Programming**

*Phil Schuman, Indiana University*

With the complexity of the financing options for college costs, determining how much a student will have to pay for a college education can be incredibly frustrating. A collaboration through multiple offices, including the Bursar, at Indiana University has led to a student cost calculator that both helps families estimate the total cost of college and encourages behavior changes to lessen the cost. Learn the features of the calculator, how it maximizes user experience and how your institution can implement a similar initiative.

This session will conclude with a group discussion and Q & A session.

### Learning Objectives

- Attendees will discuss how they can improve student financial well-being by focusing on their technological capabilities
- Attendees will be able to devise ways to utilize technology effectively to help students make more informed financial decisions
- Attendees will identify how they can create a more engaging user experience for their students when providing financial education
- Review how an institution went from a standard tuition calculator to a tool that is reimagining how students prepare themselves for the cost of college, and how small decisions can add up to a brighter financial future

MONDAY, APRIL 1 • 4:00 - 5:00 PM

## **Financial Literacy Tools and Strategies for the GenZ Student**

*Betsy Burton-Strunk, BankMobile Disbursements & Judith Flink, Flywire*

The majority of Generation Z are debt-averse and concerned about financial wellness. However, 80% rely on parents and family for financial information. This has proven to be a less than desirable path, because so many of these parents grew up in a different financial environment, with less sophisticated options relating to finances. They truly struggle to understand the new options themselves. With shifts towards self-service, automation, and 24/7 availability of apps and digital banking, the financial options have changed dramatically since even 10 years ago.

It is important for institutions to provide some basic programs to address financial literacy and money management in order to give Generation Z a better foundation for making important financial decisions. This presentation will share ideas for building financial literacy resources on campus and encourage information sharing between participants.

### Learning Objectives

- Recognize the shift in expectations from Millennials to Gen Z
- Understand what financial literacy is
- Learn where to find resources that will support the development of financial literacy programs

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TUESDAY, APRIL 2 • 10:30 - 11:30 AM

### **R.O.I. FOR M.E.**

*Nick Kilmer, Texas A&M University*

The Money Education (ME) Center at Texas A&M University was opened to enhance the financial literacy and wellness of its 69,000 students. With staff and resources, the ME Center is capable of doing so, but only with a sound, long-term strategy. Its strategic plan, R.O.I. for M.E., is focused on maximizing the Center's return on investment through initiatives and programs related to Research, One-on-one advising, and Instruction. This presentation will explain this strategy and its benefits.

#### Learning Objectives

- Better understand how financial education directly supports university priorities
- Learn how to collaborate with campus partners to create credit financial literacy courses
- Become aware of different methods for increasing student loan literacy and reducing student loan default
- Understand different opportunities to engage with at-risk students and how research can support financial literacy efforts

TUESDAY, APRIL 2 • 12:30 - 1:30 PM

### **Higher Education Financial Wellness Panel**

*Katherine Beaumont Doss, Palo Alto Community; Paul Goebel, University of North Texas; Nick Kilmer, Texas A & M; and Phil Schuman, Indiana University*

The topic of financial wellness is becoming more and more prevalent on college campuses across the country. As institutions work on the creation and/or enhancement of their program it can be difficult to find the necessary contacts to answer their questions, especially in such a relatively new field.

This session will provide the best opportunity for those interested in higher education financial wellness to learn more about the climate of the field from some of its top experts. And since these panelists have been vetted by those involved in the Higher Education Financial Wellness Summit, you can be sure that they have enough knowledge and personality to give quality information without putting anyone to sleep.

#### Learning Objectives

- Attendees will be able to identify the issues their institution and others across the country are facing, as it relates to student finances
- Attendees will be able to apply the knowledge gained from the answers of the experts to their own financial wellness efforts on their campus
- Attendees will develop networks of like-minded individuals to build a community of contacts that will help them with their programs

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TUESDAY, APRIL 2 • 1:45 - 2:45 PM

### **Mission Possible – Students and Money**

*Paul Goebel, University of North Texas*

Research has shown that students are more likely to drop out of school because of “outside pressures” – such as finances and employment pressures – than poor grades. Acknowledging that a strong correlation exists between academic success, retention and financial literacy skills, the University of North Texas established its Student Money Management Center in Fall 2005. The goal was to streamline all money management education services under the oversight of one dedicated office serving as a single point entry to eliminate frustrations and confusion among students seeking support and guidance. The session will provide a behind-the-curtain view of an award-winning collegiate financial education program. As always, should you or any of your team be caught or killed, the Secretary will disavow any knowledge of your actions. This tape will self-destruct in five seconds. Good luck.

#### Learning Objectives

- Define key components of a financial literacy/well-being program
- Develop one collaborative opportunity to strengthen the personal financial literacy skills of students

TUESDAY, APRIL 2 • 3:15 - 4:15 PM

### **Student Success is Everyone’s Business: Collaborating to Serve Students on a Community College Campus**

*Katherine Beaumont Doss, Palo Alto College; Gilberto Becerra Jr, Palo Alto College & Edward Sanchez, Alamo Colleges District*

With community colleges serving almost half of students enrolling in higher education, institutions must find creative ways to meet students where they are and help support students throughout their educational journey from entry through completion. Palo Alto College, part of the Alamo Colleges District, is an open access Hispanic Serving Institution serving a student body that is comprised primarily of first generation, under-resourced college students who have unique needs and strengths. This session will focus on how the Division of Student Success has collaborated with the Business Office to support all students in enrolling, persisting, and completing a credential. Finally, this session will provide an overview of how continuous process improvement efforts are utilized to assess student learning.

#### Learning Objectives

- Understand how the College has developed strategies to understand and meet our student needs
- Understand how the Division of Student Success collaborates with the Business Office
- Understand the College’s Division of Student Success Model for Process Improvement