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Effective Counseling:
*a handout to facilitate training
on this topic in your office*

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Effective Counseling: Basic Definitions

- Definition of Effective:
 - Adequate to accomplish a purpose; producing the intended or expected result
 - Producing a deep or vivid impression
 - Prepared and available for service
- Definition of Counseling:
 - Advice, opinion or instruction given in directing the judgement or conduct of another
 - Interchange of opinions as to future procedure; consultation; deliberation
 - To urge the adoption of a course of action; recommend a plan or policy.

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Effective Counseling Scenario

Student walks into the aid office angry because 'financial aid' is stopping her from registering.

Aid representative must be able to:

- Not take the anger personally
- Find out where the registration hold originated (probably from the bursar's office)
- Find out if there is an easy solution (sign forms ?)
- Help student to review and understand the processes and that you can help

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Effective Counseling Scenario

*Take time now to **role play this scenario** among your office staff or meeting participants; create and use a written script or improvise; use common examples and language from your interactions with students.*

Afterward, be prepared to review, discuss and share techniques that have worked for you in the past, in addition to those techniques that have been problematic.

Examples and Techniques Follow

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Financial Aid Counseling Techniques

- Use active listening techniques; be prepared to determine what the student is really asking even if she/he does not use the right financial aid lingo.
- Prepare to be supportive and understanding of student at all times; we are the experts they are coming to for guidance
- Identify current issues and problem resolution
- Identify future issues and problem resolution
- Monitor student's actions: follow up and design plans for progress

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Financial Aid Counseling Techniques

- Create Financial Aid Checklists for students to use as reminders.
- Plan for progress and success: student as the active and responsible partner; assigning accountability to student and parent
- When appropriate, help student network with colleagues on campus: a network of support
- Visualize outcomes
- Bring fresh eyes to each student counseling session; don't let a prior student encounter affect this new encounter.

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Other Issues for Discussion

- **What are other challenges to effective counseling?**
 - Student does not follow through regardless of your intervention and engagement
 - Inability to create a plan of action due to student anger and frustration
 - Lack of confidential space to conduct counseling
- **What policies do you have in place to pass the student situation upward, if warranted? Is this an option for you? Does your supervisor “have your back”?**
- **Have you handled other situations similar to this one and if so, what would you have done differently?**

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Questions and/or Comments



The following 3 slides show actual steps that could have been used in the scenario described at the start of this handout.

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Steps in the Counseling Session in Our Example

- With student, review financial aid application procedures: refer to school's web instructions but ALSO show her in person where and how to access those instructions on the school portal, see missing documents, and show her how to get to the federal student loan application links.
- Our example has student expressing that her parents are unwilling to contribute. She asks if she can be an independent student. Review dependency/independency criteria on FAFSA and help her to understand that she does not meet independency criteria.
- Ask in a caring way, the reasons why her parents are not able to contribute

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Steps in the Counseling Session in our Example

- If there is no possibility that parents will contribute, discuss her options: that it is important for parents to complete the forms even though they will not contribute, in order for her to qualify for all aid.
- If possible, indicate that with her permission, you would be willing to talk with her parents.
- Discuss all financing options: student loans. If a private loan is needed after federal loans, can she get a co-signor. Would she qualify for any institutional loans?
- If there is a remaining balance, discuss options: payment plan, student loans, student employment.

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Steps in the Counseling Session in Our Example

- If she needs to clear her balance immediately, and if the school has an emergency loan, refer her to that office, or better: call that office on her behalf. However, this is a stop-gap measure and will not solve her problem.
- Discuss planning for the future, to ensure that all of this will be done earlier and that you are here to help her.
- Set up future multiple appointments, to make sure there is follow-up, engagement, and completion of required application steps.
- Create a to-do list, and print anything she needs to make sure she gets through these steps.
- Ask her if she has any remaining questions.

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