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REDUCING THE COUNSELING LOAD: BETTER USE OF PROFESSIONAL ASSOCIATIONS, THE MEDIA, AND PARAPROFESSIONALS

by *Helen M. Trutko*

Eligibility for Basic Educational Opportunity Grants (BEOG), expanded through the Middle Income Student Assistance Act, is a major factor in keeping open the option of a college education for thousands of students. The possibility of aid is good for students from families in even the \$15,000 to \$25,000 bracket if applications are correctly completed and submitted on time.

The upsurge in applicants is taxing all phases of financial aid operations, according to reports from the Bureau of Student Financial Assistance. Students who need information or help with forms may find college aid offices short of both time and staff. The Bureau's bulletin in March, 1979 indicated that many students were apparently not receiving enough information, or help with forms. For example, of the initial BEOG applications received, 33.9 percent were incorrectly completed or had insufficient data to process a Student Eligibility Report.

Freshmen, because of their unfamiliarity with forms and processes, are particularly affected by inadequate aid counseling. Financial aid awards are a major factor in the educational decisions made in the freshman year, according to studies by Helm and Willis (1975) and by the College Board (1977). Minority students and women are especially vulnerable, since they are more likely to lack adequate parental support and opportunities for significant summer and term-time earnings.

The lack of parental support, funds, and adequate counseling has been described as part of a "cooling-out" process. Women and minority students may be discouraged from pursuing academic degrees and "reoriented" toward less-demanding, "more realistic" short-term career goals.

Adequate financial aid counseling can play an important role in attracting and retaining both the traditional and non-traditional student. In an era of declining college-age population (with estimated declines of 18% projected for the 1980 through 1990 period), new approaches to financial aid counseling seem essential.

College aid officers now cope with counseling needs by mailing information, participating in workshops, and conferring with parents, students and counselors. These are important activities, demanding much individual effort and hours of time, but available staff and energy limit what can be accomplished.

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The Ohio Association of Student Financial Aid Administrators' (OASF AA) High School-College Relations Committee was interested in exploring what could be done cooperatively through the association and elsewhere to make more efficient use of OASF AA members' time. Ohio has a number of state agencies active in counselor and student contacts. There are also counselor's professional associations, representing different phases of guidance. All of these organizations have regular meetings and also hold annual conferences where financial aid sessions could be offered. All have publications that can be utilized to contact counselors.

Using regularly scheduled counselor meetings and existing publications has the following advantages:

1. Counselor' "released" or free time is always limited. They may not attend extra information meetings because of prescheduled client appointments. A session on financial aid that can be worked into an existing commitment of time, without additional absence, is more likely to be attended.

2. Brief updates in regular counselor newsletters are more likely to be read. They reach counselors without a separate mailing being required on the part of financial aid officers.

3. Material prepared for one training session can be replicated elsewhere, if there is a coordinating organization aware of the material. Audio-visual material can be developed to apply to certain groups. Good material can be shared throughout the state where needed.

4. Information about training opportunities can be widely distributed. Better attendance is probable.

5. By coordinating efforts, colleges are less likely to be overloaded with information requests. The burden can be more equally distributed.

6. The most knowledgeable speakers can represent the financial aid community and preplanned sessions can mean that better training is done throughout the state.

7. Feedback can be obtained from counselor meeting evaluations to help in planning training sessions. These evaluations can give a better picture of financial aid counseling needs, if the survey is a joint effort by counselors' and aid officers' representatives.

It would be useful to recognize at this juncture some of the organizations with which cooperation can be sought. The Ohio Association of College Admission Counselors, and OSCA, the Ohio School Counselors Association, currently sponsor large, well-attended guidance conferences with dozens of workshops. They also send regular newsletters to their members.

The American College Personnel Association, with divisions in 29 states, offers conferences, workshops, publications, newsletters, and directories related to all phases of college advising. The American Personnel and Guidance Association is another large organization with over a dozen divisions. Membership includes youth workers in colleges, schools, rehabilitative agencies, social services, adult education and vocational training centers.

State departments of education and divisions of guidance also have official counselor publications and newsletters, and arrange training meetings. State college associations sponsor large college "fairs" which offer good opportunities to reach students, parents and counselors. Agencies like the Bureau of Vocational Rehabilitation, Social Security, Veterans Administration, and the "TRIO" programs all have regular training sessions, which can provide opportunities for the interchange of financial aid information.

Last year OASFAA participated in five regional workshops offered by the Ohio Division of Guidance. The professional association also provided speakers for five large articulation conferences sponsored by the Ohio College Association and the Ohio Association for College Admission Counselors. News bulletins were prepared for the Ohio Association of College Admission Counselors (OACAC) and distributed to their membership as part of the OACAC newsletter. OASFAA's High School-College Relations Committee is actively participating in planning the sections on financial aid in the Ohio Board of Regents "Handbook on Ohio Colleges". This is a standard counselor's reference, mailed by the state to all high schools.

A "hotline" list was developed by OASFAA's High School-College Relations Committee. It provides the names of aid officers willing to serve (on regional basis) on a counselor's "hotline" to answer questions on financial aid.

In addition to utilizing cooperative interaction between professional associations, financial aid associations can explore better use of public media. A column for campus or local newspapers, radio interviews and announcements, television public service spots, graphics for libraries and schools are all possibilities which can widen contacts. These activities can be projects of the associations' training committee, high school-college relations and/or public relations committee.

The positive experience over the last few years in Ohio indicates that cooperative efforts can result in improved training. Persistence has established rapport. Some groups were not aware, for example, that financial aid administrators have professional associations willing to help.

While many activities were successful, others were found to need improvement. Survey forms distributed at counselor meetings helped to provide information on needs. Many of the counselors responding added written comments. A summary of the replies revealed that counselors wanted early fall updates on changes from prior year's processes and step-by-step explanations on form completion.

The counselors requested resource material for helping students with special family circumstances like divorce, unemployment, or disability. Most preferred that training in financial aid be offered at regular guidance meetings scheduled by the Division of Guidance, or the Ohio Association of College Admission Counselors, rather than at separate financial aid meetings. They wanted to receive bulletins on aid, and appreciated counselor manuals or handbooks. They also sought special material for older students and minority populations. The survey has resulted in Ohio achieving better planning for counselor handbooks and workshops.

At an aid officers' state convention, a program on planning workshops for parents or counselors can stimulate creative thinking. Good ideas can be shared.

The OASFAA High School-College Relations Committee collected information on innovative college approaches, like the counselors' financial aid "breakfast program" initiated by the University of Akron. Personnel at the University provide a popular early morning training session on campus for counselors. Included in the program are presentations on aid application procedures, need analysis, and packaging and breakfast is served at the campus cafeteria. These sessions take minimum time from the counselors' working days and cooperative relationships have been arranged with the school guidance departments for release time. OASFAA has also obtained a small grant from the Ohio University Chapter of Phi Delta Kappa to facilitate surveys on how counselors use financial aid information and what help aid administrators can best provide.

In addition to cooperative action in training school and agency counselors, and wider use of public media, the aid officer can shift some of the day-to-day informational chores to trained para-professionals in the college aid office. More than 100 articles have appeared in the ten journals sponsored by the American Personnel and Guidance Association relating to the effective use of para-professional guidance aides. Brown (1974) urged adding carefully selected para-professionals to the mix of available counseling services in school and colleges. He observed that research consistently showed that para-professionals can be trained to be effective, practical and adaptable counseling aides.

The large pool of mature, college-educated women seeking meaningful part-time employment represent an excellent resource for trainees. Older students and mature adults who can often work flexible schedules can help provide consumer information effectively. Training programs are essential, if para-professionals are to act in a counseling, rather than a clerical role.

The job of guidance technician calls for maturity, empathy, judgment, a good knowledge of aid, and skill in communication. These competencies can be developed in para-professionals by an appropriate strategy of training. Grabbs and Jarmin (1976) describe the sequence of appropriate steps in training as "micro-counseling". In micro-counseling, Level One focuses on theory, and should include workshops dealing with the types of aid, requirements, application procedures, and information on form completion. These basic aspects of aid can be provided through workshops offered by the Department of Education (ED), the College Scholarship Service (CSS), and American College Testing program (ACT) and professional associations of college aid officers and counselors. Cooperative action in arranging beginners' workshops is already underway in many states.

Level Two stresses developing individual counseling skills through lectures, demonstrations, audio-visual materials and role-playing exercises focusing on admission and financial aid. Level Three includes the observation of actual counseling, participation in helping in groups, review and self-evaluation. Internships in college or school offices are needed at this level, with on-site supervision provided.

Well trained guidance aides can be used in a variety of tasks, similar in scope to the following ones outlined by Brown (1974) and Hoffman (1976) in articles dealing with the functions of para-professionals:

- Providing forms in a timely manner
- Keeping records on applicants
- Writing bulletins on financial aid
- Reviewing current changes in aid
- Maintaining statistical information
- Answering questions from resource materials
- Handling initial inquiries
- Doing intake interviews
- Initiating home or agency contacts
- Conducting orientation sessions on aid
- Helping in group presentation and discussions
- Contacting teachers and staff of cooperating agencies
- Doing follow-up on students who have begun but not completed applications.

The financial aid advisor's role can be delineated in advance, or it can evolve further according to the needs of the job situation.

A system of financial aid advisors has been utilized in the Cleveland area for over 10 years. It is known as the Cleveland Scholarship Program, Incorporated, a privately funded, non-profit college financial aid counseling agency serving close to 4,000 students in twenty high schools in and near Cleveland, Ohio.

Financial aid advisors currently work in twenty schools and in the central office of Cleveland Scholarship Programs supplementing counselor's help in many areas. Their tasks include:

1. Assisting parents and students with the completion of all application forms, with requests for fee waivers or deferrals, and with appeals or corrections.
2. Referring parents and students directly to financial aid professionals for help with difficult problems.

The organization also receives more than \$250,000 in student aid funds from business, foundations and industry. This support is distributed in the form of grants and loans to Cleveland area students. The Cleveland Scholarship Programs solicits the funds, helps companies find eligible recipients, and processes awards. In the ten years of operation, the number of students from the schools served by the programs entering post-secondary education has increased from approximately 20% to over 50% of the graduating seniors.

The organization has found micro-counseling techniques to be an effective means of training college-educated women to serve as part-time, paid guidance aides. A regular program of four or five in-service workshops yearly is used to assure current training in aid. It has been found helpful to add to the regular ACT, CSS and ED materials, samples of correctly completed forms and quick reference charts on state and federal aid deadlines and procedures. Staff bulletins or meetings are used to point out problem areas, to provide instructions for special situations, and to alert the financial aid advisors to changes and deadlines.

Help given with financial aid applications plays a substantial role in securing adequate aid and in ensuring subsequent enrollment. This help can be useful in recruiting and retention. Because of the increased numbers of families experiencing divorce, separation, illness, unemployment, disability, or other problems affecting aid, students need informed advocates who will help with difficult forms, explain unfamiliar terms, and interact with institutions. Cooperative action by aid officers, professional counselor associations, schools, state departments of education, and colleges can assure that new approaches are used to help provide the information urgently needed by the growing numbers of aid applicants.

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