

# Counseling for Beginners: Scenarios and Case Study

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# Agenda

- Welcoming Environment
- Individual Student Advising
- Parent/Family Advising
- Referrals
- Escalating Situations

# Welcoming Environment

- Organized Space
- Body Language
- Friendly & Positive
- Tone of Voice
- Etiquette & Language
- Patience

# Individual Student Advising

- Carl is a new student to a four-year public institution. He has taken a two hour trip, each way, to turn in financial aid verification paperwork. He is here for the third time and the second page of the parent's tax return is missing. He does not want to make a fourth trip to campus.
- What do you say?
- How would you say it?

# Ideas

- What do you say?
  - Options: 1) Review home records, 2) Go to tax preparer, 3) Go to IRS.
  - Options: 1) Scan, 2) Fax, 3) Mail.
  - Extra steps: Here is my direct telephone number, please call me to let me know how and when you are sending page 2 so I can watch for it.

# Ideas

- How would you say it?
  - Empathy: I understand this is a difficult process. I hear your frustration.
  - Reassurance: You are doing a great job! You are almost finished.
  - Competency: Confidence and commanding presence.
  - Avoid acronyms.

# Reflective Listening

- Conscious effort to hear words and listen to complete/whole message
  - Intent
  - Verbal
  - Nonverbal
- Clarify what is being said
  - Empathy
  - Nonjudgmental
- Convey mutual understanding

# Parent/Family Advising

- Carl's mother approaches the front desk while you are meeting. Mrs. Mom is brought to your office. When learning that p. 2 of the tax form is missing, she "hits Carl on the head" and says "I told you to make sure everything was here. I can't count on you to be responsible. Maybe you shouldn't be going away to college."
- What do you say?
- How would you say it?

# Ideas

- **What do you say?**

- Redirect: Would it be okay if we focused on the options to complete the financial aid file?
- Pardon me, but the College doesn't allow hitting on campus, even if it is meant in jest.
- Carl, I understand you are already upset with yourself and the situation, would you rather meet alone?
- Review options and ideas presented earlier.
- May want to discuss FERPA and confidentiality as well as institutional options such as a release.

# Ideas

- How would you say it?
  - Empathy: I understand this is a frustrating process because the process requires the parent and child to work together which isn't always easy when everyone is so busy these days.
  - Reassurance: You are doing a great job! You are almost finished.
  - Competency: Confidence and commanding presence.
  - Avoid acronyms.

# Referrals

- Gwendolyn is withdrawing from the College. She's come to you to ask what to do. It is late in the term and the RT4 rules do not apply. Your institution requires she meet with academic advising and you need to make the referral.
- What do you say?
- How would you say it?

# Ideas

- What do you say?
  - Can you tell me more about your situation? (Possibly you will be able to help with the situation.)
  - Competency: It is important that you meet with an academic advisor because the advisor will be able to help you with navigating the process to return to the College when your situation changes.
  - Extra steps: Walk her to advising; call to advising to make the referral.

# Ideas

- How do you say it?
  - Empathy: I am sorry to hear you are leaving college.
  - Reassurance: You can rebound from this.
  - Competency: Explain college advising policy; discuss any financial implications such as loan repayment and academic progress.
  - Avoid acronyms.

# Referrals

- Gwendolyn comes to you to ask about the academic progress appeal process because she has lost her financial aid eligibility. Your institution requires she meet with academic advising as part of the appeal process.
- How is this referral different from the student who is withdrawing?

# Ideas

- What do you say?
  - Competency: Yes, you are correct, you need to meet with an advisor by (date). After the appointment, then you need to submit confirmation of your meeting with an advisor to me.
  - Extra steps: Walk her to advising; call to advising to make the referral.

# Ideas

- How do you say it?
  - Empathy: I understand you feel this isn't necessary.
  - Reassurance: It is possible vs. it is possible (tone of voice conveys how much reassurance is given).
  - Competency: Explain college advising policy; discuss other financial options while FA is pending or if FA is not restored
  - Avoid acronyms.

# Escalating Situations

- Aaron hasn't received his student loan check yet. He has to pay his rent in 2 days and is distressed. He says the reason it hasn't come is because it is "your fault". And it is! You took a vacation and his paperwork sat on someone's desk while you were out.
- What do you say?
- How would you say it?

# Ideas

- What do you say?
  - Competency: Please sit down while I check on your situation.
  - Competency: Find the problem; own the problem.
  - Extra steps: Provide fastest option to receipt of loan funds.
  - Never insult another department or person.

# Ideas

- How would you say it?
  - Empathy: I understand you are concerned about paying rent and possible fines.
  - Reassurance: I will take care of this as fast as possible and to prevent this from happening in the future.
  - Competency: I know you want your loan money, but there are rules and regulations so I cannot make the money appear right now. In order to avoid this in the future, it is important that you talk to others in the office when I am out of town. They can help you.
  - Avoid acronyms.

# Escalating Situations

- Jodie completed the FAFSA on August 22, the day classes started. She demands you delay her tuition payment, provide her money for books, and have her loan check ready by August 31<sup>st</sup> so she can pay her rent on September 1<sup>st</sup>. You've explained that the soonest her file will be reviewed is in two to three weeks. She's threatening to call the Admission Director, President, Chairman of the Board, and the Dept. of Education.
- What do you say?
- How would you say it?

# Ideas

- What do you say?
  - Competency: Explain the FAFSA was available since January 1<sup>st</sup>, the College's priority date was XXX, and currently the office is providing support to the front desk. The information will be reviewed and I will even try to expedite the process.
  - Extra steps: Can you bring me a copy of your FAFSA results? Perhaps I can make a call to the bursar's office based on that information to delay your tuition payment a week or two.

# Ideas

- How would you say it?
  - Empathy: I know this is not the news you had hoped to receive. You are not alone.
  - Reassurance: We will review your documents as soon as possible.
  - Avoid acronyms.

# Other ideas

- Explain chain of command and you can connect her to your supervisor.
- Have a 3-way call with Dept of Education.
- “Here is my business card”.
- Call someone from advising or counseling to meet with the distressed student.

# Discussion

- Other helpful advice.