The Peer Counselor: A Possible Solution to Two Problems in Financial Aid Administration

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by J. Jerome Cunningham

Since the Education Amendments of 1976 were enacted, it has become apparent that the legislation contains a possible solution to two of the major problems facing the aid administrator. These problems are more students who need increasingly detailed financial aid information and insufficient staff to respond to growing demands on an already overburdened system.

The peer counselor may well offer a solution for both problems. The use of a peer counselor in a staff support position, however, requires planning and training on the part of the aid administrator. The title, peer counselor, has been used in the past to denote a variety of assignments and has applied to personnel who assisted the aid office staff in carrying out routine tasks. Most assignments were clerical in nature: typing, filing, verifying bi-weekly payroll vouchers, etc. The very nature of such tasks minimized the necessity for a formalized training program. After a student had one or more year's experience, he or she could fill in for the receptionist or a clerk by answering procedural questions and distributing the proper forms to students desiring to apply for various financial aid programs.

Section 178 of the Federal Regulations is designed to implement section 493b of the Higher Education Amendments of 1976 and is titled - Student Consumer Information Services. Section 178.5 "Availability of employees for information dissemination purposes" reads as follows:

(a) Except as provided in paragraph (b) of this section, each institution which receives an administrative cost allowance for any award period shall designate, for that award period, an employee or group of employees who shall be available on a full-time basis to assist students or prospective students in obtaining the information specified in section 178.4. If the institution designates one person, that person shall be available, upon reasonable notice, to any interested student or prospective student throughout the normal administrative working hours of that institution. If more than one person is designated, their combined schedules shall be arranged in such a manner that at least one of them is available, upon reasonable notice, through the normal administrative working hours of that institution.

Institutions which have extensive experience with student employees in the financial aid office and which are also fortunate to have an interested student group on campus are already moving to improve information services to students. Wesleyan University, an independent institution in Middletown, Connecticut, has one of the original chapters of COPUS (Coalition of Independent College

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and University Students). In a joint effort the Education Studies Program department, the COPUS chapter, the Financial Aid Office and the Dean of the College organized a training program during the 1977 Fall semester and prepared peer counselors who are now functioning in the Financial Aid Office.

The joint effort produced an academic credit course taught by the Director of Financial Aid. The course covered the following topics:

1. Introduction - Overview of Student Aid - Counselor Program - Confidentiality
2. Process of Financial Aid Determination
3. Sources of Financial Aid
4. Need Analysis - Uniform Methodology
5. Need Analysis Continued and Basic Grants
6. Supplemental Educational Opportunity Grants and National Direct Student Loans
7. College Work-Study Program
8. Guaranteed Student Loan Program
9. Packaging
10. Summary - Student Accounts/Financial Aid Interaction at Wesleyan

Classroom sessions were one and one half hours in duration. In addition to the lectures, workshops using the case study approach were conducted. Students were also given reading assignments covering portions of the Student Financial Aid Handbook, sections for the CSS Need Analysis: Theory and Computation Procedures Manual and selected readings from periodicals such as the Journal of Student Financial Aid, The College Board Review and the Chronicle of Higher Education.

Twenty-four students successfully completed the course. Following interviews with the Director of Financial Aid, nine were offered the opportunity to work as peer counselors in the aid office. Prior to announcing the official beginning of the program in the campus newspaper, the selected counselors were given an intensive final briefing on the specific procedures used at Wesleyan for students applying for the renewal of financial aid. With changes in the processing calendar, the optional methods for applying for a Basic Grant and the effects of the overprinted Financial Aid Forms in use by seventeen states complicated further by Pennsylvania's own system, the responsibility of counseling students on the renewal process has given the new peer counselors a real opportunity to test their knowledge.

Previously, graduate students were often employed at Wesleyan as counselors functioning primarily in the area of student employment. The new program then generated two major changes from prior student counselor practice. A formal academic course is the heart of this new program. Students attend lectures, read regulations and participate in need analysis workshops and such activities carry with them academic credit. The financial aid officer who teaches the course has the opportunity to select the most promising students to continue training as peer counselors. Even though a student may not ultimately be employed as a peer counselor he or she will be more informed about the utility of the financial aid office on the campus.
For those aid administrators contemplating a program like Wesleyan's, it is recommended that the course be advertised in advance through the campus newspaper, the registrar's office and any other publicity means available. An active student group on campus is vital to the generation of the proper climate for establishing a peer counselor program.

The next step in implementing the program is the interview process and the selection of those students who have completed the academic program successfully (pass/fail grading was used at Wesleyan) and who wish to become peer counselors. Sixteen of the twenty-four Wesleyan students who completed the course indicated such an interest. For initial implementation it was decided to appoint six peer counselors who would be required to work two afternoon periods each week. One counselor was to be held in reserve. Peer counselors were scheduled to work for two hours in the afternoon twice a week.

While interviews and selections are underway care must be taken to discuss the new program with permanent staff employees. It is essential for a successful program that the regular clerical staff understand the need for peer counselors and treat them as an asset to the overall operation. The sensitivity of the professional staff must also be taken into account and its views considered in the planning phase.

Peer counselors must be selected, trained, and given responsibilities normally assigned to professionals. Peer counselors will need to maintain a reference file containing copies of pertinent information items, including institutional policies and procedures. Counselors are quite adept at informing aid officers of those items of interest which have been brought to the counselor's attention through discussion with students.

A word about physical placement of the peer counselor is in order. Space is at a premium in most aid offices and the problem of getting students to speak to the peer counselor first was solved at Wesleyan by placing the counselor's desk in the hallway outside the door to the aid office so that students had to pass the counselor on the way into the office. It was discovered that in many instances the counselor could provide information to the student so satisfactorily that contact with the permanent staff was unnecessary.

The counselors at Wesleyan created an information and request form for their own use and for continued training of other counselors. The form listed the specific information being requested, the nature of the student problem and the response of the counselor, either by providing information or by referring the student to a member of the permanent staff. It is vital to the successful operation of the program that each permanent staff member look upon the peer counselor as an additional support person to facilitate the operation of the aid office.

In summary, most aid office likely possesses the motivation and resources necessary to establish a peer counselor program. These are:

- The impetus of the new Student Consumer Information Services Regulations
- A group of interested students on campus.
- An aid officer willing to devote the time to training such counselors.
- This program provides an opportunity to solve problems which should not be ignored.