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IECA⁺

INSIGHTS

THE NEWSLETTER OF THE INDEPENDENT EDUCATIONAL CONSULTANTS ASSOCIATION

December 2020/January 2021

Calendar

Because of the COVID-19 pandemic, several IECA events have been rescheduled or gone virtual. IECA is posting the most up-to-date information on the Member Network.

December 3
Global College Conversations:
University of Oxford

December 8
Webinar: NCAA: Inside Secrets of
Effective Athletic Counseling

December 10
Global College Conversations:
John Cabot University

December 14
College Conversations: University
of Maryland

December 17
Global College Conversations:
Globe Business College Munich

December 25
Christmas Day: National office
closed

January 1
New Year's Day: National
office closed

January 7
Webinar: The Future of NACAC and
IECs with NACAC CEO Angel B.
Pérez and President Todd Rinehart

Global College Conversations:
Newcastle University

January 21-22
IECA Professional Member
Retreat (Virtual)

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10 Ways the Pandemic is Likely to Change IEC Work in the Future

By Mark H. Sklarow, IECA CEO



With the COVID-19 pandemic, workers are gaining a new appreciation for some changes they seem unlikely to want to give up. Here are 10 that IECs may want to consider.

colleagues, but virtual tours will not go away. IECs will have no excuse for not having visited remote campuses or smaller schools, as they will be available for touring online.

1. More Work from Home

Some IECs are already giving up their offices as they discover that space in an office building may not be as necessary as they thought. They've discovered over the last seven months that working from home can be just as productive and save thousands of dollars in rent payments.

Others are likely to maintain their offices, but experts predict they will use them less. No meeting scheduled until 2:00 p.m.? Why not work from home for the first part of the day, where the kitchen, deck, porch, and shoeless comforts offer a nicer start?

This also means more client parents will be working from home, allowing them greater opportunities to participate in the process, for better or worse.

2. Less Travel

Virtual tours have exploded and today practically every college, prep school, and program either developed their own such tour or created virtual visits for IECA. Sure, group tours will return, and we know IECs love the ability to travel with



Travel industry experts think regular business travel won't fully return until 2024. By then, many IECs will have learned to rely on other information-gathering opportunities.

3. Immunity Passports

In the next year, many expect that those who are immune to COVID-19—either because they had the coronavirus or through a vaccine—will be afforded greater freedom to travel and engage in face-to-face meetings. Often referred to as “immunity passports,” it's really a fancy way to say: before you see a family, meet with an admissions director, or

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President's Letter

A Resolution Challenge

resolution (noun): a firm decision to do or not to do something.

Years ago, I gave up on making **resolutions** when starting a new year. It wasn't because I didn't believe I could follow through on these goals; it was because I'd lose focus on them a few weeks into January. The importance of weight loss, more frequent reading for pleasure, and revisiting my Spanish course on Duolingo were soon replaced by more pressing priorities in my life. Kids, work, and the day-to-day chaos of life in general quickly pushed aside any hope of checking off those **resolutions**. But, after traversing the challenges of the past year during the pandemic, I'm reconsidering my ban on **resolutions**. In fact, I'm planning to not only **resolve** to do things, but I'm actually going to hold myself accountable for doing them.

So, why the change?

If 2020 has taught us anything, it's that things can change in a minute. The way we've always done things can be upended due to details outside our control. **Resolutions** by their very nature are the things of which we have an incredible amount of control. They are the things that, if we allow them to, can take priority in our lives. They're what we probably should have focused on beyond the first month of each new year, but we set aside in favor of the things we'd prioritized over them.

Now, don't get me wrong—my family and work will still be a priority in my life this year. However, my decision to **resolve** to do other meaningful things, and to actually stick with them, is the difference. Within our association I frequently witness members resolving to grow their businesses, to increase their knowledge on topics relevant to our work as IECs, and to support their students and families in the very best way. This year I'd like to issue a **resolution** challenge to all of you—my IECA colleagues, friends on the school, college

and program side, and outside supporters of our association. I'd like us all to **resolve** to look outside of our personal priorities and think of how we might better support others around us. Let's consider the ways in which we are stronger as a collective group supporting families through significant transitions and think about how we can grow in our professional capacity together.

If you're looking for some inspiration for how you might follow through on this **resolution**, here are just a few examples from this past year:

- Holly Ramsey (IL) recognized a need amongst members who work with homeschooled students for a space to share information and best practices. She went on to create the IECA Homeschooling Affinity Group.

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IECA⁺ INSIGHTS

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In Focus

Service Award Honorees



Gail Curran



Jennie Kent



Joanne LaSpina



Jeff Levy



Marilyn O'Toole

The Service Award recipients were selected from among members in a leadership position who contributed in a long-term effort to the association during the pandemic, and were presented at IECA's 2020 Virtual Town Hall in August.

IECA Fall Conference: Access to Content through December 30



Thanks to the over 650 IEC participants and over 400 school/college/program/vendors who attended our Fall Conference! It was great to see and interact with so many colleagues even though we couldn't be together in person. Among the many highlights was the presentation of the inaugural IECA Making a Difference Awards, recognizing those who have, through unprompted meaningful gestures, made a difference in the work of our members. Recipients are individuals selected from the general membership who are not currently serving in a leadership role in IECA, such as board members and committee chairs. If you were registered for the Fall Conference and missed the live presentation on Friday, be sure to log on to your conference dashboard and watch the recording to hear more about our winners! Honorees include:

- Katherine Andersen
- Stacey Cunitz
- Eric Endlich
- Heidi Molbak
- Sydney Montgomery
- Holly Ramsey
- David Stoeckel

Congratulations to all of the awardees and thank you for your support of IECA colleagues!



The Exhibit Hall (College Fair, School Exchange, Therapeutic Swap, and Vendors) will be open 24/7 through December 14 for all attendees. ACE talks, breakouts (including Q&A), and the College Showcase will be available to conference registrants through December 30.

Everyone who attended the IECA conference can earn CE hours. Visit the conference website for detailed instructions.



The Fall Conference featured welcome videos from a number of our Southern California Regional Groups, in recognition of the original plan to meet in San Diego. Pictured above, Joyee Lin, chair of the IECA Orange County group, welcomes attendees on day two of the conference. Other greetings came from San Diego and two of the Los Angeles groups.

From Some of our Attendees...

We were pleased to receive so much positive feedback from conference participants:

"A big thanks to you and the IECA staff for coordinating such a quality virtual event, both from a vendor and attendee perspective. Although I sorely miss seeing colleagues in person, you have created the next best thing!" —Brooke Daly

"The session brought out specific information to help me support my students applying to boarding schools, and when working with seniors and juniors who are questioning the college planning process in the midst of the COVID crisis. I appreciated hearing directly from the admissions people; Very helpful, real-time information." —Carol Kinlan

"The Keynote [ACE] Speakers provided welcome enthusiasm and optimism, reenergizing us to continue on the course of making a positive impact after a busy year of uncertainties and pivots for everyone." —Sandy Arahamian


Save the Date: IECA Spring Conference

May 3–5, 2021

Join us for the IECA Spring Conference, scheduled to be held in Detroit, Michigan, May 3–5, 2021. There remains a possibility that the conference will be held virtually, with a decision expected this winter. This is the largest conference for the independent educational consultant community.

We look forward to seeing you there!



A close-up photograph of a woman with reddish-brown hair and a young child with blonde hair, both smiling and lying on their stomachs on a grassy surface. The woman is on the left, and the child is on the right. The background is softly blurred, showing more of the grass and some foliage.

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take part in any live event, don't be surprised if you need to either prove your immunity or demonstrate that you are medically cleared.

The purpose of these medical clearances is not to keep the attendee safe; rather, it's to assure the other conference or meeting attendees that it is fine to participate because everyone in the room has been medically cleared.

4. Video Meetings Will Be the Norm

The era of live meetings with students may be a thing of the past. Students have gotten used to learning, interacting, testing, and meeting via computer with all of its conveniences (meeting in pajamas!) and may resist a return to drive-to sessions with their IEC. IECs may discover that virtual meetings cut down on missed sessions and wasted time.

In addition, helping students to master Zoom-based interviews may become a regular part of the process for school and college consultants. What to wear, what to have in the background, and their demeanor on camera may all play a greater role as live, campus-based interviews become less common (but may, on the other hand, become a clear demonstration of student interest and intent).

5. Varied Work Schedule

Experts tell us that the 9-5 work schedule has gone out the window. Increasingly, work-from-home employees have created flexibility in their work schedules. At an office, if you are free from 10:00–11:30 a.m., you sit at your desk and work. Today, you can go out for a run, put away your delivered groceries, and perhaps reschedule that morning meeting for 5:30 p.m. Look for schedules to remain flexible and consider your own body's peak work times to maximize your work hours.

6. Greater Equity for Women

While in the short term COVID-19 is disproportionately impacting women's gains in the workforce and leading many to reduce hours or leave their jobs entirely, there is reason to be hopeful. Greater work from home and flexibility in work hours may, in the longer term, create a more equitable space for women, who have traditionally been marginalized in the workforce when child-rearing begins to interfere with the 9-5 workday. We may also see an increased role for men in child-rearing.

7. Greater Reliance on E-Commerce

IECs who gather checks from clients and head over to the bank to make deposits are discovering the time-saving ease of e-commerce. More IECs are accepting credit cards or electronic fund transfers for payments. They are banking with cell phones and ordering office supplies on their laptops. The future promises more advancements, more ease, and quick adoption.

8. Conference Flexibility


We have heard from members over and over: "I can't wait until we can meet in person again." Yet, as web-based conferences

improve, develop, and offer an ease of participation, we may hear that less and less. Conferences that allow participants to attend every session—rather than choose one for each time slot—plus avoid air travel, hotel bills, and diet-busting cocktail parties, may grow increasingly common. Or more likely, organizations like IECA will explore varied formats and options so that members can learn in the style they appreciate most. In-person conferences are unlikely to go away, but they are likely to evolve with remote options.

9. Streamlined Staff

For many IEC practices, their first non-consultant staff member is the office manager/office assistant who handles appointments and billing, and takes inquiry calls. As technology replaces the need for some tasks and office use decreases, I expect many offices to reduce overhead costs by eliminating this position. The key may be ROI: does this person answering inquiries convert a high percentage of callers into clients? This measure, rather than a 9–5 assistant, may be how IECs will decide about the necessity of such a position.

10. Another Baby Boom May be Coming!

All of this staying-at-home has led some experts to anticipate a coming baby boom, helping to assure a growing client base in the 2030s. 

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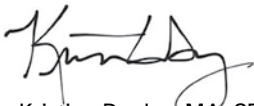
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- Members with the Schools designation were struggling to keep up with the opening plans for boarding schools around the country as a result of the pandemic. Heidi Molbak (LA) stepped up and created a useful "Opening Plans" document that could be updated as campus decisions were made and that members could access as needed.
- After a successful gathering of the IECs Advising College-Bound Athletes Affinity Group at the Atlanta conference in 2019, Katherine Andersen (CA) and David Stoeckel (CA) initiated an ongoing virtual roundtable in 2020 for members to continue their professional development in this arena.

These are just a few of the small but meaningful steps a few of our members have taken to support their peers during these challenging times. As we navigate through the coming months, think about what you can **resolve** to do this year to support your colleagues. Alternatively, what are some of the ways your peers and our association can support you? I'd love to hear from you. As your association president, I **resolve** to work with our board and the IECA staff to ensure that IECA remains an invaluable resource for our members and school, college, and program colleagues...and this year I'm sticking to it.



Kristina Dooley, MA, CEP
IECA President

Join us Online for the Professional Member Retreat

January 21-22, 2021

The Professional Member Retreat was created to allow mid-career IECA members to gather and explore business issues that relate to their stage of professional development and to encourage communication and sharing in a relaxed, size-limited environment. Since the retreat began, about 60 professional members have participated annually. The "One Great Idea" discussion, moderated by Mark Sklarow, gives participants a chance to share their own creative, innovative, and successful ideas.

The Retreat is limited to IECA professional members and is particularly focused on the needs of members with five years of experience in the profession. **The presentations and guest speakers are appropriate and valuable for those practicing in all specialty areas:** college, schools, therapeutic, learning disabilities, and international. The focus of the retreat is sharing, group discussion, and special-focused presentations. This year's Retreat will include timely sessions on how to manage a large caseload, how to effectively connect with your audience during the pandemic, business changes from COVID-19, and more.

Retreat registration opens December 15. Visit <https://link.iecaonline.com/retreat> for details and to register.



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Are Canadian Universities a Good Choice for Your Students?

By Bibi Malek, EdM, IECA (Canada)

Canadian universities are a popular choice for international students for a variety of reasons. These include an enviably high standard of living and quality of life, prestigious universities with relatively high global rankings, lower tuition/room and board costs, better acceptance rates, affordable health insurance, and the fact that Canada is a diverse, welcoming, safe and well-organized country. Hence, looking at Canada as an alternative option to education from one's home country can make good sense for some international students. Obtaining a visa to study at a designated learning institution in Canada is relatively simple and can be completed online.

Educational Options Abound

Students studying in Canada have a range of choices, the majority being public, from large research institutions like McGill University, University of British Columbia, and University of Toronto, which consistently rank high among top universities worldwide (see *Times Higher Education's* World University Rankings 2021), to the smaller universities like the "Maple League" institutions that make up a consortium of four similar schools in Eastern Canada and Quebec: Mount Allison University, Acadia

University, St. Francis Xavier University, and Bishop's University. The focus of the Maple League is a liberal education for undergraduate students. Canadian universities, as a whole, offer both undergraduate and graduate degrees which pretty much cover the entire spectrum of academic offerings ranging from the sciences, to business and commerce (a very popular undergraduate option), fine arts, humanities, and engineering. Study abroad and other co-curricular programs are available. Bachelor's degrees are generally four years in duration.

Acceptance Rates are High

Additionally, top Canadian universities have relatively high acceptance rates that vary by faculty. There are programs, however, such as Commerce at Queen's University, Business at Richard Ivey (University of Western Ontario), and Health Sciences at McMaster University that are highly selective, with admission rates in the single digits. Admission requirements vary by institution and are quite transparent, resulting in fewer ineligible students applying haphazardly just in case they might get in. Typically, students are evaluated based on their academic



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transcript from grades 11 and 12. Unlike their US counterparts, Canadian university applications are not essay-intensive, with some exceptions like UBC where essays and a list of activities are required. Essays are, however, becoming more prominent, particularly for commerce and engineering programs. Canadian universities are generally easier to gain admission to than their US counterparts and the process is simpler and much less stressful for applicants given that no letters of recommendation or in-person interviews are required and “demonstrated interest” is never a factor. Some competitive programs, such as UBC’s Sauder School of Business, University of Toronto’s Rotman School of Management, and University of Waterloo’s engineering program, among others, do require an online automated short interview.

Bilingual Education

It is no wonder that students from across the world seek higher education in this bilingual country where they can study in French or in English. In addition to the province of Quebec, which is Francophone, bilingual study options are available across the country at institutions such as the University of Ottawa and Glendon College at York University. Bilingual studies enrich the students’ educational and cultural experience while also improving future job prospects elsewhere in the world, including in Francophone countries.

Co-op Education for Experiential Learning

Canadian education is known for its co-op programs, which

can take place locally, nationally, or internationally. This type of experiential learning was initially pioneered by the University of Waterloo and has since become the hallmark of Canadian postsecondary education. For those who take advantage of this on-the-job learning option, they will have the opportunity to work in three or more organizations within their industry while gaining income and experience. For most, this will add an additional year to their program of study and work. However, co-op is also a foot-in-the door for employment opportunities and will help students decide what type of work setting appeals to them most—often even allowing students to further narrow down their educational path. The academic year at Canadian universities begins after Labor Day and ends in late April, allowing for a longer summer break, an added advantage for gaining work experience. For information on work permit programs and eligibility criteria, visit www.cic.gc.ca

For those who take advantage of this on-the-job learning option, they will have the opportunity to work in three or more organizations within their industry while gaining income and experience. For most, this will add an additional year to their program of study and work.

Finances and Affordability

Tuition fees in Canada are generally lower than those of the US and UK and vary by program. For the 2020/21 academic year, an international student will pay approximately \$50,800 (\$38,100 USD) per year for tuition if enrolled in applied science versus about \$39,600 (\$29,700 USD) if enrolled in the humanities. Given that living costs are generally dollar-for-dollar equivalent with the US, and the fact that the exchange rate of the Canadian dollar is 25 percent lower than the US dollar, education and living costs are quite affordable for international students. Healthcare costs are subsidized by the government, making them very reasonable. Tuition for Canadian citizens and permanent residents, whether residing in Canada or elsewhere, is at a much lower rate and extremely affordable.

Lifestyle

The majority of Canadian universities offer housing in the first year, after which students move to off-campus housing in the vicinity of the university or in the city where they are attending university. Some move back home and commute to classes. Given the cosmopolitan and peaceful backdrop, the university experience in a Canadian city is more of a European type lifestyle than the typical American university experience where students live on campus, eat together in dining halls, and attend football and basketball games to cheer on their teams. As such, this type of cosmopolitan city life is well-suited for students who are slightly more mature than their peers. Canada and its major cities consistently rank in third place or better in the world for quality of life.

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An Open Path to Citizenship

Canada is an ideal place for international students to spread their wings and broaden their horizons, especially as they will have an opportunity to work up to 20 hours per week during the academic year and full-time during school breaks. International graduates of Canadian university students may be eligible to transition to permanent residency and eventually to citizenship in Canada, which may be a very attractive option to some.

Canadian university students may be eligible to transition to permanent residency and eventually to citizenship in Canada, which may be a very attractive option to some.

Canada is Welcoming and Embraces Diversity

Canada welcomes those seeking higher education, and many of its largest urban centers, Toronto and Vancouver included, boast a foreign-born population of 40 percent or higher. This multicultural country is very welcoming to students from across the world both in its cities and campuses. International students pay higher tuition rates than domestic students, hence they support the educational institutions they attend while also boosting the economy through their labor, tax payments (if working), and general spending.

Educational Support Services

Support services make the transition to study in Canada easier and include orientation events, language support, student advising, disability-related accommodations, and career counseling. There are a variety of extracurricular clubs and associations to engage the student in campus life and academics.

Outdoor Life

For students who are environmentally conscious, and for those who seek active adventure and enjoy spending time outdoors, Canada offers a myriad of experiences. Adventures abound from windsurfing to kayaking, sailing to white water rafting, hiking to mountain climbing, and from spending time in world-class ski resorts to visiting rainforests and pristine national parks. In fact, students in Vancouver can ski and surf the ocean on the same day!

Finally, in Canada, the culture of kindness, tolerance, and inclusion is more the norm than the exception. Nobody asks you "where you are from." It is, therefore, no wonder that more and more students, from across the world, flock to the shores of this safe and beautiful country, which is ranked sixth on the global peace index. Visit www.EduCanada.ca, the official government of Canada website, for study in Canada information and to begin your research. 🇨🇦

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Commitment to the Mission: Returning to Boarding School during a Pandemic

By Korey Lee, IECA Associate (MA)

In the midst of a global pandemic, private and independent schools continue to focus on providing a top-notch education for their students. This goes beyond academics to include a full-on educational experience while also managing health and safety in new and challenging ways. What are the considerations families are using to determine the best school communities for their children in these times, when not only academic success, but even lives, are on the line? What aspects of the school experience have students yearning to return to classrooms and hallways? As independent educational consultants (IECs), understanding these choices amid the new reality of COVID-19 is essential as we look to support families in seeking the best opportunities for their children.

I recently spoke with a student, Vienay Morris, and her mother, Tammy Henderson, to get their

answers to these questions. This family chose a boarding school outside of a large city, as they felt public schools were not the ideal option for their child. Like many families seeking the support of IECs, they recognized the value of private school and were willing to invest resources of time and energy to find the right fit. While this family has access to a well-known scholarship program to assist them in the process, the mother noted, “I do, however, wish I had a personal consultant helping with all the paperwork. It was a very daunting task, but we knew private school was the best for her.” The student and her parents were equally invested in all educational opportunities available to her, no matter what.

Lee: What influenced your choices regarding in-person learning with the COVID-19 crisis looming?



Korey Lee,
Lee Education
Enlightenment, can be
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Henderson: Well, to be honest, my daughter is in her sixth form (senior year) and I know that it's very special to her to complete her last year. It's important for all of us that she can finish out this year. What also influenced me was, I was there as the school began to reopen. Each student had a 14-day quarantine. And I saw all the safety procedures that they put in place. I was very happy and satisfied with the way the school was prepared.

Morris: It was important for me to return to school so that I could maintain relationships with friends and classmates. I also want to complete all the things that come with prize day (graduation) in my senior year.

Lee: Do you have faith in your school's academic platform and how has it worked for virtual learning in the past?

Henderson: Yes, however, I know my daughter needs the structure of the physical classroom to do well. I feel she is more mentally focused in a traditional classroom setting. Help from the teachers is paramount for us and the classroom also gives her accountability.

Morris: I didn't like virtual learning. I felt like I was just staring at the screen. I had no connection to my classmates. I also enjoy high school experiences like basketball games, camaraderie with classmates while hanging out on campus, and just being a high school student. It's my senior year and I'm excited to complete all the things that come with that.

Lee: Are you happy with what you've heard from your student about how the school is responding to the COVID-19 crisis on campus and within the community?

Henderson: At first, I was very worried she was going to get sick. The school has a good plan, I believe. They do daily testing, there are lots of handwashing stations. There's sanitizer everywhere. Because she actually had to quarantine before returning to school, I believe that the school has a very good plan, all things considered.

Morris: I was definitely scared at first and I had concerns about getting sick. But having to quarantine for 14 days before returning to school made me feel okay. My school has daily testing, morning health checks, plexiglass all across the school and even in the dining hall, and hand sanitizer everywhere. That has made me feel much more comfortable and safe.

Lee: What are your goals for your student academically this year?

Henderson: She's a senior this year and I know that she's prepared for all the senior accolades, graduation, and prom, and all the things that she can enjoy with her classmates. I am, however, concerned about returning after Thanksgiving plans, especially with the rising number of cases across the country. But our hopes are for her to return and graduate, be triumphant, and have a great remainder of the school year.

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Morris: To be able to maintain great academic standards, keep my college applications organized, and have fun with classmates and actually have graduation.

Lee: What's the school like for you now, and what are your plans for the year?

Morris: School is different. We do a lot of things outside socially distanced and with masks. I'm excited to be back at school even in the middle of a global pandemic. It is my senior year and I'm ready!

Living in a residential boarding community has been a challenge for my own family over the last couple of months due to the COVID-19 crisis. After having conducted this and other interviews, it confirms my thoughts that schools have to be focused on the welfare of families first. To me, this underscores the importance of student/family-focused residential living.

Initially, I was upset with the decision for students to return to campus. However, I understand how important it is for students to have a sense of normalcy for academic success. I believe that the power of education still exists. The fact that students are eager to still be successful gives me hope. Students and families will overcome the difficulties we are currently facing because they have a bigger goal in mind. For this student and her mother, that goal is graduation and college success. It will definitely take a united front from all of us to make sure that we can help all families reach their goals. That is our mission as IECs. 



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What's Next? Transitions from Therapeutic Placements

By Jody Dobson, MA, IECA (PA); Ruby Laufer, OTR/L, IECA (NJ); and Allison Letourneau, MA, Associate Head of School for Enrollment Management, The White Mountain School

Independent educational consultants who work with both therapeutic and traditional school placements have noticed interesting trends in both worlds as each learns from the other. Many traditional boarding schools (especially smaller schools) have strong learning support programs. More recently, they have enhanced their on-campus counseling services and encouraged their students to use local therapeutic services where appropriate. At the same time, many therapeutic programs have significantly improved their academic components, implementing teacher-directed learning, augmenting learning supports, and expanding course offerings. Traditional schools are acknowledging the necessity of strong counseling services, and therapeutic programs are recognizing the value of robust academic programming.

For kids who have been successful in therapeutic interventions, these recent trends have provided more alternatives to the question, "What's next?"—including those coming directly from wilderness therapy programs. For the past several months, IECA's Therapeutic Committee has been hosting presentations from boarding schools that have had success with kids from therapeutic placements. Allison Letourneau from The White Mountain School (Bethlehem, NH) was a participant. She writes:

Small boarding schools have long been attractive options for a wide range of students, including those who have successfully completed a therapeutic program and are professionally recommended to transition to a traditional boarding school. As an admission director who has worked in small boarding schools for a decade and a board member of the Small Boarding School Association (SBSA), it's my belief that there are a growing number of characteristics unique to small boarding schools that create conditions in which these students can thrive.

In these small residential communities, students have access to trusted adults who know them well. Given the strong culture of connection in these schools, there are many opportunities for students to engage with adults and peers in multiple facets of their lives. Faculty advisors serve a critical role in supporting and empowering students and serving as conduits through which information can be quickly shared with parents and consultants, preventing kids from "falling through the cracks." The emphasis on building durable relationships strengthens our ability, as educators, to know when and how a student needs to be stretched or supported and the nuances of that decision.



Jody Dobson, Dobson Educational Services, can be reached at jpd@dobconsult.com



Ruby Laufer, Dobson Educational Services, can be reached at rubyl@comcast.net



Allison Letourneau can be reached at Allison.Letourneau@whitemountain.org

continued on page 18

Our communities are intentionally designed to embrace a holistic approach to serving students. Small boarding schools are deeply committed to the principle that in order for students to take courageous risks—intellectually and otherwise—social and emotional learning must be woven into the fabric of the student experience. Given our size, our schools are well known for their ability to create opportunities for faculty members to speak frequently about individual students, increasing our ability to respond to students' needs quickly, appropriately, and on an individual basis. When asked about the transition from a therapeutic setting to a small boarding school, one of our current students shared,


"I visited several small boarding schools and, while they all had their own flavor of culture, I felt a palpable and authentic sense of belonging in each community. Small boarding schools have what I need to be successful: a challenging and relevant academic experience, access to academic coaching, a strong sense of community, weekly meetings with my therapist, and opportunities to try new things in a culture free of judgment."

Students who have successfully completed a therapeutic program have engaged in deep, meaningful work, work that is anchored in an understanding and awareness of self. As admission directors, we are always in search of key indicators that can predict a student's ability to find success at our schools. In my experience, the breadth and depth of the work in which these students engage

during their time in therapeutic programs often prepares them to serve as exemplars and leaders in our communities.

As unique as the students are who successfully complete therapeutic programs, schools, too, are unique in who they serve best. Direct conversations with small boarding school admission officers provide the best way for IECs to fully capture a school's ability to appropriately support and challenge a student.

...schools, too, are unique in who they serve best. Direct conversations with small boarding school admission officers provide the best way for IECs to fully capture a school's ability to appropriately support and challenge a student.

This is a very exciting time for us to be having these conversations. It is more important than ever to expand the range of options for our clients. Small boarding schools have had increasingly successful experiences with our kids coming from therapeutic programs, and our kids have blossomed in these schools. As schools have become more receptive to our therapeutic kids, they are also recognizing the benefits and richness of having these kids as members of their communities. 



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Jim Nolan with IECA members Harriet Gershman (Emeritus) and Lynn Hamilton (CA)

“Only Concern is for the Student; Only Client is the Parent”

IECA Founding Member Jim Nolan Reflects on 45 Years in the Profession

Jim Nolan holds a unique position. While several founders of IECA are still practicing members, only Jim Nolan of Philadelphia has been a member, working as an IEC, for all of the association’s 44 years. He recently sat for an interview with IECA CEO Mark Sklarow to reflect on his long career, during which he worked with over 10,000 students.

Like most IECs, Jim moved into a career in consulting after working in college admissions, including undergraduate admissions at the University of Pennsylvania, where he worked when UPenn accepted about half of its applicants.

When he entered the IEC profession, most were advising on boarding school placements, with just a few advising on college placements. More significantly, the “biggest names” were really agents—accepting kickbacks of 15 percent of the first-year tuition and holding contracts with just a limited number of schools.

While the first independent educational consultants were likely operating as far back as the 1920s, Jim became one of about a dozen in a fledgling profession who set out to create an organization focused squarely on ethics as its core mission. Jim

indicated that the association’s founding motto was “Our only concern is the student; our only client is the parent,” a focus that quickly separated what would eventually become IECA from the agents. [Fun fact: the association’s original name was Independent Educational Counselors Association.]

Of course, these founding members soon discovered that it was a challenge to explain this new, unheard of profession to potential clients, and most in the original group were located in a handful of major cities. Jim shares that in the early years, IECA members often took on other assignments, including career advising and trainings for the NBA, NFL, political groups, and more.

Jim noted that the profession has gone through a number of evolutions: the dramatic growth of therapeutic advising in the 1980s to the sustained dominance of college advising since the late ‘80s. One change that Jim spoke of has been one many will recognize: the change in parents who are “more demanding, concern over maximizing their child’s ability to get into a top school, and how much they hover over their children.” As for the students themselves, “more entitled” was his quick description.

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Reflecting on new IECs joining the profession and building their practices, Jim advised, "I would say that the best way to market oneself is to provide superior service to one's clients. The surest referral source is satisfied customers." He encouraged IECs to "be knowledgeable, professional, kind, sensitive, honest, and available."

Forty-five years in, Jim recently cleaned out his suburban office, shifting his practice to his downtown Philly residence. Much was discarded. One thing he couldn't part with: the folders containing the records of his favorite students. "I'm still in touch with many of them" Jim said, especially after he was shown on a recent television broadcast.

Jim also notes how his IECA colleagues have become his closest friends, still meeting with them (now via Zoom) on a regular basis, even as many have retired. "These are people I traveled with, including trips to Europe that resulted in more good times than business leads."

As for the future of IECA, Jim hopes that the association will always adhere to those same founding principles, putting ethics at the forefront.

As he looked back on his career, Jim reflected, "I can't imagine doing anything else for the last 45 years. It's been a great ride." 🦋

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IECA[®] Webinar series

IECA Webinar Series Update

In 2021, IECA will shift from a series of regularly scheduled webinars on a specific Tuesday at noon, to special webinars scheduled based on current events. This will allow us flexibility to pivot and offer events that will best serve members' needs. For questions or to suggest a future webinar, contact Valerie Vasquez-Guzman at Valerie@IECAonline.com



Regional Groups

Admission reps that are interested in meeting with IECA members, virtually or in person, are encouraged to reach out to our Regional Groups. You can find a list of IECA's Regional Groups at link.iecaonline.com/regional

Austin, TX

The Austin Regional Group met in November and discussed many hot topics, including college decisions and trends. Due to COVID-19, this has been an exceptionally challenging year for everyone. Each member shared their takeaways for this application season and how they want to adjust for next year. This group is beyond special as IECs work hard to support one another, especially the newest IECA members/IECs. We will end the year with a Holiday Happy Hour Zoom on Wednesday, December 9. In 2021, the group will continue to meet monthly via Zoom as that is the most efficient and easiest way for us to reach all of our members! It typically does not meet in June and July. For more information about this group, contact Deb Davis Groves (deb@davisgrovesedu.com).



Broward/Palm Beach, FL

On October 2, the Broward/Palm Beach Regional Group had a well-attended Zoom get-together, with 18 IECs convening online. It was a great opportunity to share recent information and ask questions and was, as always, a lively meeting. For more information about this group, contact Susan Groden (sgrodencs@gmail.com).

New Jersey

The NJ Regional Group has been busy! Following presentations from WPI, the University of Alabama, SCAD, and Union College, the group migrated to a series of thematic presentations. NJ IECs learned about Canadian universities (thanks to Chris Weber at UBC), athletic recruitment (thanks to Joanne Nora-Trattner at Clear Directions), and BFA programs (thanks to Morgan Theze and Wayne Petro from PACE University). More recently, the group learned about Elon's strategic plan and new majors from VP of Enrollment Greg Zaiser, and met their new NJ Representative.

The group will host Skidmore College in November and then in December will wrap up the year by comparing notes from this admissions season in a virtual "Whine and Wine." If you are an NJ IEC and are not receiving notices of our meetings, please contact Hildie Steiner (hildie@highfivecollegeprep.com) or Shari Powell (creatingcollegeoptions@gmail.com). We'd love to have you join us!

Philadelphia, PA

The Philadelphia Regional Group has been very busy hosting several virtual events throughout the fall, including presentations by Scott Grzenda, admissions counselor at the University of Delaware; Compass Education Group, on admissions testing; Aaron Gabat, admissions counselor at Bard College at Simon's Rock; and Dave Frohman, associate director of admissions at Ohio Wesleyan University. Upcoming programs will be led by Mark Emblidge, assistant director of undergraduate admissions at the Rochester Institute of Technology (RIT), and Tyra G. Crosbie, admissions counselor at Gettysburg College. For more information about this group, contact Fran Manning-Smith (fran@steplanners.com).

San Diego, CA

The San Diego Regional Group has been busy this year. After the group realized they weren't going to be able to meet in person, it quickly shifted to meeting in a virtual setting. San Diego-area IECs reached out to various colleges and educational experts to provide content they could learn about through virtual meetings. Over the past six months, the group has had presentations by DePaul University; Cal Lutheran University; IECA professional member Paul Rivas on study skills; Gonzaga; Saint Mary's College; University of Colorado, Boulder; Denison University; and Peg Keog on financial aid. For more information about this group, contact Jackie Woolley and Gina Gerrato (ECASDRegionalGroupCoordinator@gmail.com).

Europe

The European Regional Group has its general meeting every third Wednesday of the month with an additional monthly session if presenters are secured to share their expertise. Forthcoming programs include presentations by Francis McIvor on Oxbridge and UK admissions; Franklin University; Paul Rivas on "Tools for IECs: How to Help Your Clients with Motivation and Time Management"; and a webinar with Cabot University, in collaboration with the IECA Global Committee. For more information about this group, contact Jean Louis (jean@louisedconsulting.com) and Yesim Erez (yesimerez@admittanceeducation.com). 🇹🇷



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In the News

Eric Endlich (MA) was quoted in “Seven Ways to Successfully Land College Scholarships” in *Forbes* on October 13.

Susan Groden (FL) was quoted in the segment “Applying for College During COVID-19” on WLRN, the Miami affiliate of NPR, on October 22; “Florida universities are pushed to drop ACT/SAT scores in admission decisions” in the *Orlando Sentinel* on September 11; “How are Florida’s high school seniors going to go to college if they can’t take SAT?” in the *Miami-Herald* on October 15; and “Applications Tank in State That Requires SAT or ACT” in *Inside Higher Ed* on November 9.

Colleen Ganjian (VA) was quoted in “Public Schools Will Struggle Even More as Parents Move Kids to Private Ones During the Pandemic” in *Time* on August 31.

Ibrahim Firat (TX) was quoted in “Dual credit classes save money, time for college” in the *Laredo Morning Times* on October 16. He was also interviewed for the segment “Should your child repeat a grade amid COVID-19 learning challenges?” on KTRK-TV (ABC 13) on November 6.

Laurie Kopp Weingarten (NJ) was quoted in “It’s Not Too Late to Have a Meaningful Gap Year” in *Your Teen* magazine; “How to

Apply to College During COVID-19, According to 5 Experts” on *Brainly.com* on October 6; and “Experts worry that Penn’s test-optional application process will benefit wealthier students” in *The Daily Pennsylvanian* on October 19.

Belinda Wilkerson (NC) was interviewed for “How Extracurricular Activities Help Your College Application” on *The University Network* on October 5.

Kristina Dooley (OH) was interviewed for “How Letters of Recommendation Help Your College Application” on *The University Network* on October 7.

IECA and **Judy Bass** (MD) were referenced in “Picking up after an unsuccessful college experience” in *MultiBriefs* on October 26.

Carolyn Mulligan (NJ) was quoted in “How Students Can Mitigate the Effect of a Bad Economy on Career Exploration and Job Search” in the fall 2020 issue of the college planning magazine *NextStepU*.

Erin Avery (NJ) wrote the article “How to ‘Demonstrate Interest’ during COVID College Admissions” which appeared in the October 15-21 edition of the *Two River Times*.

Initiatives

Heidi Molbak (LA) was selected as a “Person to Watch” in the twice-exceptional and cognitive diversity movement by *2enews.com* and was featured in the fall 2020 issue of *Variations2e* magazine, citing “It is a testament to your leadership and accomplishments in this field that you have been selected for this recognition.” *Variations2e* and *2eNews.com* provide high-level information and resources about cognitive diversity and twice-exceptional (2e) education.

International ACAC is engaging in an organizational change process to improve its effectiveness, particularly around creating a diverse, inclusive, equitable, and socially just organization. The Change Workgroup will play a key advisory role in helping facilitate and guide the change process. IECA Board member **Laura O’Brien Gatzionis** (Greece) was named to the Change Workgroup in October 2020.

Congratulations to **Melinda Kelly** (Associate, Ohio) whose volunteer work in Southern Ohio has led to her selection as president of the Cincinnati Rotary Club. Kelly will be that organization’s first Black president.

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Irvin W. Katz Award Recognizes Jo Leonard

The Irvin W. Katz Award is presented each year by the IECA Foundation. It was created to honor consultants for their volunteer work with organizations providing educational opportunities to children. Irv Katz was a beloved IECA consultant who worked passionately for the good of children.

This year, the IECA Foundation is delighted to present the Katz Award to IECA professional member Jo Leonard for her work with the R.J. Leonard Foundation, an organization she founded in memory of her father, who passed away in 2006.

"Robert James Leonard, my dad, was a successful teacher and entrepreneur who had a passion for knowledge and education, as well as the tenacity necessary to build a successful business from very little. His passion, the decisions that he made, and the opportunities that he grabbed have inspired me throughout my life and still do today. In August 2008, motivated by both his passions and the support that he offered to me throughout

his life, I launched the R. J. Leonard Foundation (RJLF) in memory of him.

The organization offers education and life planning, mentorship, and extensive financial support to youth aging out of the foster care system so that they are playing on the same field as their more fortunate peers and are able to become self-sufficient and independent, free from poverty for the rest of their lives. I am proud of the work we have done to educate, mentor, and inspire this highly at-risk population, for whom the probability of success after aging out is exceptionally low.

Since our launch 11 years ago, we have worked with 21 Fellows, and we have watched some amazing success stories as they have launched into self-sufficiency." 🙌



A Student Speaks

By Masuma Islam Lonczak, a 2010 Graduate of Sisters Circle in Baltimore



"I moved from Bangladesh to the US with my parents and sister, Makruma (also now a graduate of Sisters Circle). At the time, I was placed one grade level back because I knew very little English. Everything was new and different.

As a young woman, growing up I often struggled to find myself. I struggled to fit in with other students because of my social class status, and at times felt unseen and didn't know my place in society as a woman of color. But with Sisters Circle by my side, I was given the opportunity to meet other incredible women at various events, such as career panels where women in diverse professions talked about their work. I met so many mentors within our network who are making positive differences in people's lives.

Today, I'm a more confident independent woman because I know I matter and my place in society matters. It was my experience

with Sisters Circle from early adolescence to young womanhood that truly inspired me to pick my major in college and my career in diversity education at Johns Hopkins University.

Sisters Circle has been there for every milestone of my life and my success today has a direct connection with this loving community. With mentors by my side—those who truly believed in me and directed me to resources along the way—I was able to get to places I never thought existed for someone like me."

Sisters Circle received a grant from the IECA Foundation in 2019. They provide long-term mentoring to foster meaningful and sustainable change in the lives of girls and young women in Baltimore. As early as middle school, Sisters Circle motivates students to create a vision for their own future by providing career exploration workshops, exposure to professional role models and internship opportunities. They work with students to make intentional decisions about their future, define success for themselves, and choose their own path. 🙌



Introductions

Please Welcome IECA's New Professional Members



Frank Bauer (China) has been an IEC for six years. Previously, he was a postdoc and guest researcher in mathematics at leading universities, including Harvard University,

Max Plack Institute (Germany), and Fudan University (China), among others.

Bauer earned a master's degree in physics from University Leipzig and a PhD in mathematics from the university's Max Planck Institute for Mathematics in the Sciences. He has published many mathematical research articles, including applied work on disease-spreading models.

*Frank Bauer, PhD
CFE Center For Excellence
Beijing, China 100020
(+86) 13466327662
frank72127@gmx.com
Specialty: C*



Chris Bell (CO) has been an IEC for three years and was an associate member. He has more than 25 years of professional experience in higher education. Previously, he was a

high school English teacher.

Bell earned an MS in student affairs in higher education from Colorado State University. He attended the 2018 IECA Summer Training Institute, is a member of NCAG, NACAC, and ASCA, and serves on the board of College Consultants of Colorado.

*Chris Bell, MS
Bell College Consulting
Boulder, CO 80304
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chris@bellcollegeconsulting.com
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Jennifer (Jenny) Cochran (NV) has been an IEC for five years and was an associate member. Previously, she was owner of Integrated Educational

Consulting and a high school director of college and career counseling.

Cochran earned an MAT from Sierra Nevada University and holds credentials as a secondary science teacher. A member of LDA and an AP coordinator for the College Board, Cochran is working to become an expert in college placements for LD/ND students.

*Jennifer (Jenny) Cochran, MAT
Jennifer Cochran Educational Consulting
Gardnerville, NV 89410
775-315-4586
jcchrn5@gmail.com
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Marcy Beatty (CT) has been an IEC for four years and was an associate member. Previously, Beatty worked with Madison Youth and Family Services, managing

strategic planning, grant writing, and community asset-building.

Beatty holds a BA in government from St. Lawrence University. She earned secondary school teaching certification and a Certificate in College Counseling with Distinction from UCLA Extension. Beatty serves on the IECA College Committee and volunteers with A Better Chance (ABC).

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Counseling with her business partner, Jennifer Stephan (MA), she worked in communications and marketing in the financial services industry and held senior leadership positions in non-profits.

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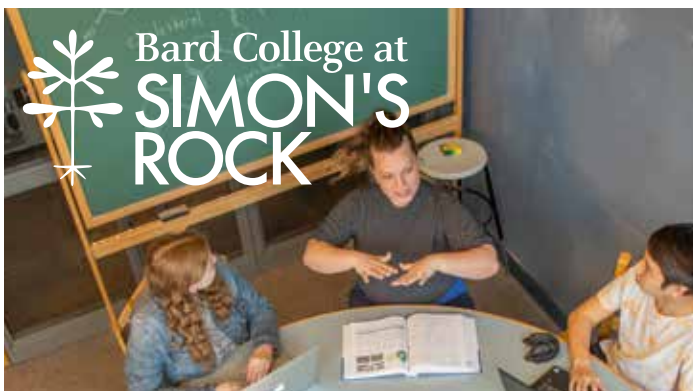
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Insights Moves to Quarterly Schedule

Please note our new quarterly schedule for *Insights*. The journal will now be produced four times per year (Winter, Spring, Summer, and Fall issues) and mailed to members in February, May, August, and November. Email Insights@IECAonline.com with any questions or to receive our submission guidelines and deadlines.



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Insights Through the Years

As Insights transitions from a bimonthly newsletter into a quarterly journal in 2021, we thought you might enjoy seeing the progression over the years.

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1995



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2018

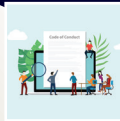




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IECA⁺
TM

Member-to-Member INSIGHTS

THE **NEWSLETTER** OF THE INDEPENDENT EDUCATIONAL CONSULTANTS ASSOCIATION

December 2020/January 2021

IECA Regional Groups

Connect with your IEC peers in your region! Visit [link. iecaonline.com/regional-groups](http://iecaonline.com/regional-groups) for information on how to join existing groups or form new ones. Existing Regional Groups include:

National

Arizona
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Connecticut
Florida
Georgia
Illinois
Kentucky
Minnesota
New Jersey
New York
North Carolina
Northeast New England
OH/MI/Western PA
Pennsylvania
Tennessee
Texas
Washington
Washington, DC
Wisconsin

Global

ASEAN Nations
Latin America & Caribbean
China
Europe
South Korea & Japan
Southeast Asia
Turkey

The Ten Pillars of College Consulting Excellence, Part One

By Dr. Steven R. Antonoff, CEP, IECA (CO)

Independent educational consulting has grown in many ways over the past three decades. What started as a cottage industry is now an established profession with a comprehensive body of knowledge and recognized standards, norms, and operating procedures. This professional growth has been accompanied by a dramatic increase in learning opportunities for practitioners. Here I want to present 10 concepts that I consider the pillars of independent educational consulting.



First, a comment about "Buffy." Buffy has been my go-to student name for many years. Originally just a placeholder name, Buffy quickly came to be associated with me and my practice. Buffy is not meant to represent a preppy, popular cheerleader from an affluent family (much less a teenage vampire slayer). In the context of this article, Buffy should simply be considered any adolescent seeking sound advice about college.

Pillar I: Student

Key to a successful consulting practice is finding the essence of each student. The better we understand Buffy, the better our consulting. Great matches are not possible without a straightforward fix on student attitudes,

characteristics, and interests. Getting to know our students and building and maintaining rapport with them are central to consulting success.

"Buffy is just a typical teenager" is a common parental comment that always leaves me asking for more. Teenagers may share certain attributes and generational interests and attitudes, but all teens are different. Buffy is not the sum of parental influence or peer pressure;

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she is neither a product of suburbia nor the epitome of a small-town girl. And she is certainly not the incarnation of her GPA or test scores. She is an individual with her own interests, concerns, worldview, need for autonomy, stress level, learning style, etc. When we meet with a student, we need to ask: who is this individual in front of us? Is she intelligent, practical, dreamy, unconventional? Is she a doer, a thinker, an artist? What are her passions, her goals? Her likes and dislikes? What motivates her? What turns her off? Is she a participant learner? Enthusiastic about school? Has she worked up to her potential? How strong of a candidate for admission is she? And the important follow-up to that question: how strong a candidate does she think she is?

As we get to know Buffy, we find other questions to ask. What type of people does she hang out with? Does she have a love of learning? How does she cope with pressure? How does she handle getting a low grade?

Some questions will answer themselves during the consultation. Observation will show us how Buffy interacts with her parents and whether she lets them take over the conversation or speaks her own mind. As independent educational consultants (IECs), we must ensure that we empower the student and allow her to lead the way throughout the college discovery process.

Part of getting to know Buffy is remembering the ebb and flow of student feelings and thoughts. It's true that every life has its highs and lows, but in the lives of teenagers, these highs and lows can be more dramatic, resulting in a rollercoaster ride of emotions.

We need to recognize that even the most insightful IEC is only viewing the tip of the iceberg in terms of teen feelings. Beneath the surface, each of our students is filled with insecurities and angst about life to various degrees. We must dig a little to learn about the other issues occupying a student's emotional bandwidth. Is it a matter of self-esteem, physical safety, doubts about a career and life planning? Is it one of the many issues associated with leaving home and making major decisions on one's own for the first time? This period in an adolescent's life can spark self-analysis in not just students but their parents too as they assess how well they've prepared their student for the future.

Most importantly, as we get to know our students, we need to hold up a mirror for them. We need to help Buffy see Buffy. She is strong and determined. She sometimes second-guesses herself too much. She may or may not be as resilient as she thinks she is. She has the capacity to assess and learn, to make good decisions, and to succeed in a variety of environments.

This discussion of Pillar I would not be complete without acknowledging the following realities. First, selecting a college is a metaphor for choosing a young adult path, and as such can take on overwhelming importance, which needs to be recognized and addressed. Second, the college search is a self-questioning process and may prove arduous for students not accustomed to self-reflection; what should be kept in mind is that the passage is more important than the finish line. Third, the college application process should promote rumination and insight rather than competition and angst. Part of our job as IECs is to help students and their families understand this.

There have never been more tools available to students to help them learn about themselves. My "Self-Survey for the College Bound" from *College Match* is designed to spark student self-reflection and start conversations; it is available without charge on my website, schoolbuff.com. Additional self-surveys can be found at astudentofcolleges.com.

Pillar II: Time

On one level, it may seem that the college selection timeline gives IECs almost unlimited time to do the job, particularly if we are meeting with a student via a package or comprehensive program. But this is a fallacy on several levels. IECs can maintain a viable business and roster of students only through efficient time management. Efficient use of time is important to our clients as well. Teenagers have full schedules of academics, extracurricular activities, and sometimes jobs; parents have careers and household responsibilities. Our students and their families want advisors who are organized and don't waste their time.

*Effective time management is also
the means to ensuring that we meet our
goals with our clients.*

Effective time management is also the means to ensuring that we meet our goals with our clients. How much time do we need to get to know the student? How much time should we spend with parents? It's not only the number of hours with the student or the family that matters; it's how those hours are utilized to meet specific consultation goals. We must also factor in the sometimes-unintended consequences of time devoted to one area rather than another. If I spend 90 percent of my time with a student on college essays, what message does that send about the importance of essays in the admission process?

As IECs, we may have deep knowledge of the admission process and insight into teens, but we cannot achieve maximum success without a clear and stated plan of action for utilizing our time with the student. This action plan is our curriculum. The more planning that goes into our curriculum, the more assurance we have that time is being used successfully, and the more we will accomplish during the college planning months. With a curriculum, we are organized; without a curriculum, it's anyone's guess as to whether goals are being achieved and time is being used to maximum effect.

Remember that our work with students is a journey that starts with the initial contact and ends with success in college. Along the way are significant mileposts marking our progress. We get to know the young person in front of us. We establish timelines and deadlines and do our best to see that these are met. We work with the student and family on developing a college list. We advise on such factors as college visits, ED, and financial aid. We look over applications and essays and suggest ways to make them stronger. And as the journey's end draws near, we provide counsel to help assure that our student will thrive in college.

There are two primary models of organizing the time needed to achieve these goals: the comprehensive model and the non-comprehensive model.

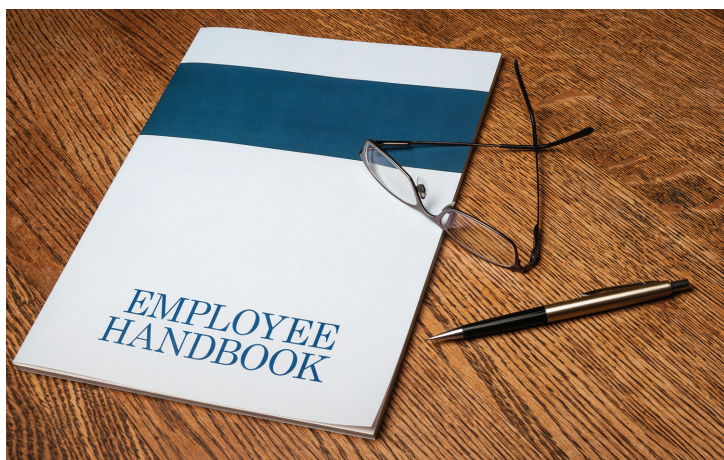
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For Growing Practices, 2021 Might Be the Year to Focus on People Operations

By Zach Galin, MEd, IECA (WI), and Allison Lopour, Executive Director of Talent/Master Counselor, Collegewise

What is people operations?

One thing people always fixate on when considering growing a business is the administrative workload: the benefits, the payroll, the labor laws—all that exciting, glamorous stuff. And those are all necessary considerations. But what they often overlook is what HR has really become: a more strategic, thoughtful practice, focused on people. Because HR is people operations.



People operations is the idea that our team members are human, not just a resource to execute the business. It's a holistic approach to caring for and managing your team. And when it's done right, people ops will encompass the entire employee experience and influence the culture of your organization. Whether you're adding your first hire or scaling an existing team, you can be intentional about designing an experience that leaves your employees feeling happy to be there.

What are the key components of people operations?

People ops encompasses all actions that help employees stay engaged and productive at work, starting the moment they sign the offer letter. It may seem too early to consider each of these pieces, but clear processes, expectations, and outcomes from the start will allow new employees to jump in and do their best work.

Onboarding: What information do you need to collect? What information does your employee need to know before they start? This is your opportunity to set the right tone. Consider what you'll communicate, when, and who they'll engage with as they get settled.

Company handbook: What are the rules, spoken and unspoken, in your organization? Here's the perfect way to introduce culture and values, set expectations for employees and management, and clearly communicate policies.

Tools and tech: What tools or resources do they need to do their job well? What programs do they need to be familiar with now?

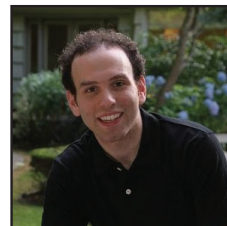
Training: What skills are most important in this role? IECs' needs will differ from those of essay editors and operations folks. What processes do they need to manage? How will you standardize

and deliver the training? Will you do the training yourself or rely on industry organizations (IECA, NACAC, etc.) to supplement?

Ongoing development: What does this person/role need in six months? In a year? What opportunities are there to continue learning? As the admission world changes (hello, 2020!), how will you keep employees up to speed with new information?

Engagement: Do employees have opportunities to contribute, to share and implement their ideas? Do they feel connected to and involved in their work and the organization?

Offboarding: Whenever possible, how can we part as friends? What can we learn from this person before they go? What changes will we make to the role, expectations, or hiring process moving forward?



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The comprehensive model—also referred to as “full package,” “flat fee,” “all-inclusive,” or “retainer”—typically involves working with the student from the beginning of the junior year through the senior year. It may entail 10, 15, or even 20 meetings. This is the model that historically has been the most common model in the consulting world and is still widely used.

Comprehensive programs work well because college planning is a process. Development of a great list of colleges, for example, is more than just a matter of plugging a student's GPA and test scores into an online survey and seeing what pops out. It comes from sustained interaction with the student and as noted in Pillar I, a clear sense of who that young person is. Establishing rapport with students and encouraging them to be honest and open can take several meetings. List-building may require several sessions and be marked by trial and error. Colleges that at first seem to be good choices may turn out to be wholly inappropriate as we learn more about our students and our students learn more about themselves. Time allows an insightful IEC to think more widely and add colleges to the list. The comprehensive model not only gives the IEC time to do the job well but also an opportunity to observe how the student grows and changes in the process and, if necessary, make adjustments.

Not every student wants or needs the comprehensive model, however. For those students and their families, the IEC can offer non-comprehensive models that still organize time effectively and offer a thorough curriculum. This may require more intuition on the part of the consultant as well as trust and openness on the part of the student and family.

Every student is different and requires more or less emphasis on one or another of the college planning activities.

Non-comprehensive models could consist of a package of five meetings rather than 10. The IEC could offer “Right College Fit” consultations, “College Application/Essay” meetings, or a “Ninth and Tenth Grade” package. Other possibilities for non-comprehensive models include group meetings, workshops, and boot camps or consultations with schools (including religious and charters), businesses, non-profit agencies, and community-based organizations. And of course, there is always the option of meeting with students on a “per consultation” or hourly basis.

Regardless of the model, a curriculum with clear-cut goals helps keep the process manageable and enables the IEC to track progress and feel confident about the consultation. Having a curriculum or time plan doesn't mean being inflexible, however. Every student is different and requires more or less emphasis on one or another of the college planning activities. As IECs, our fundamental value proposition is that college selection is personal and not “one size fits all.” Our goal is to help students find that good college fit and empower them to take ownership of the college search and application process because sooner or later our students must recognize that that they—not their family and not their friends—must live with the decision.

IECs don't provide just time. We offer time in the company of a professional, an expert with hard-won knowledge about colleges and the application process. To be considered experts, however, we must have (or develop):

- Interviewing and listening skills as well as intuition and empathy;
- Deep, extensive knowledge about colleges and the college application process;
- A core set of attitudes about such concepts as success, our profession, and the value of a college education; and
- A plan for our career growth, development, and networking.

The “expert hat” doesn't just land by itself on our head. But as we work to become aware, sensitive, and informed, one day we realize we're wearing that expert hat and turns out it's a comfortable fit.

Pillar III: Match

There may be no word in the IEC lexicon more important than “match.” I'm proud that over the last 30 years, educational consultants have done more than any group to promote the concept of match in college selection. We've also boosted the awareness of “fit,” and that term too has stuck. We've accomplished this by defining and emphasizing these terms via books, lectures, and training programs.

In the 1950s and '60s, when a student went to the school counselor, the only question was “Where can I get in?” As admission to colleges has become more complex and fraught with anxiety and uncertainty, the concept of “match colleges” rather than the “most prestigious” or the “most elite” helps students to focus on what matters to them and what they, as individuals, need. The concept of match has taken hold not only because it makes sense but also because kids are happier.

We help students find a match by knowing our students well and by a thorough exploration of the factors important in finding a college. Let me highlight a few of these factors and some of the ways IECs help students understand which variables will make them happiest in college. A more expansive list of factors can be found on the worksheet “Qualities That Will Make a College Right For You,” available for free download on my website: schoolbuff.com

In discussing these factors, we want to be sure we make them “come alive” for students and parents. Too often, students have a hard time visualizing how a class of 300 might feel or what a rural Southern atmosphere is like.

Take size, for example. When we talk to students about college size, we are really asking a series of questions. What size is best academically? In other words, would Buffy do better in a class of 30 or in a class of 300? What size is best socially? Does Buffy crave the nonstop bustle of activity available at a big university or the comfort of a close-knit community where she may stand out?

When discussing the important factor of location, we also need to ensure the student understands the distinction between selecting a campus's physical site and choosing a vacation destination! These are two quite distinct variables.

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It Is All About Risk

By Liz Agather, IECA Associate (NC)

While the financial health of an institution should have always been a data point for families to understand, it is even more important today. Colleges have spent millions on COVID-related items and lost out on significant income from being partially open to reductions in athletic revenue. Additionally, fewer students are graduating from high school due to the decreasing national birth rate and some colleges, pre-COVID, were already having trouble filling seats. Meanwhile, state budgets have been impacted and public institutions will likely receive a substantial reduction in state funding.

In September 2020, UNC Chapel Hill's newspaper, *The Daily Tarheel*, reported: "UNC could experience financial losses of \$400 million between the onset of the pandemic in March up to the middle of summer 2021." This was after the NC Board of Governors asked the UNC System chancellors to prepare scenarios for budget cuts of up to 50 percent.

In July 2020, Stanford announced the discontinuation of 11 non-revenue sports after the 2020/21 season.



Meanwhile, we have seen top-ranked institutions announcing furloughs and other reductions.

As independent educational consultants, what is our responsibility in ensuring that families understand the financial health of a college? How does one determine if a school is over-leveraged or at risk of closing its doors or eliminating programs?

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Ten Pillars, from page M4


Cost is an essential consideration for most families, and one that can be overshadowed by other factors, especially when a particular college seems ideal. It is up to the IEC to remind students and parents about those good match colleges—the ones that may cost less, offer merit scholarships, provide lots of aid, and represent a good value. In other words, we play an essential part in helping a family determine the worth of education at College A vs. College B. Caught up in the process of choosing a college, a parent may tell us, "Oh, Buffy can look anywhere. We'll find the money." But that thinking is not only flawed but could have serious consequences if family circumstances change. Would the same parent drop Buffy off on a road filled with car dealerships—Chevy, Ferrari, Ford, Land Rover—and say, "You can get anything you want"? I doubt it. Parents need to honestly discuss costs and finances with students, and the IEC can help with that discussion.

Academic offerings and majors are significant factors in choosing a college, as they should be. However, I often find students and parents focusing too much on a major, particularly in building the college list. Unless the student is absolutely committed to studying an obscure subject or a specific technical field, there are numerous colleges that can provide a great undergraduate education, no matter what major is chosen. On a related note, students may want to consider a university's emphasis (or lack thereof) on undergraduate education. Depending on the student and family,

factors essential to a college match could also include religious, racial, or ethnic preferences; academic rigor; name recognition; or the availability of special programs for students with learning disabilities or neurodiversity needs.

Perhaps the most critical variable in choosing a college is the nature of the student body. What is the student culture? Is it artsy, granola, pressured, competitive? Is it scholarly, unusually diverse, outdoorsy, mellow, or party central? A shy small-town student looking at a big urban university might be better off at a smaller suburban campus within an hour's bus ride of the bright city lights.

Using the knowledge we have gained from college visits, we bring these factors and other considerations to life so that students and parents can fully understand how each one affects a student's success in college. We also play an important role in helping students and parents rank factors to determine the ones that are essential to their individual college search.

This article includes material from my book A Student of Colleges: Fundamentals of Independent Educational Consulting. Due to its length, this article is appearing in two parts. Part Two will appear in the Winter 2021 issue of Insights and includes these Pillars: Judgment, Teacher, Student of Colleges, Wisdom, Professionalism, Decency, and Access. 

Why should people operations matter to any educational consulting practice?

People, of course, are important to every business. But in the service industry, and even more so in education, our people are what we are selling. Not only must we take great care with the recruitment, interviewing, and hiring processes, but we must also focus on how to train, develop, and support our employees at all stages of their lifecycle with our organization. Happy and well-supported employees will reflect well on your business, no matter their function.

People are also at the center of how we recruit new clients. Often, our own teammates are involved and engaged in the community. Their connections frequently lead to new families, consultations, and registrations. Ensuring that our employees feel like they have what they need and that our businesses are serving clients well will leak into their conversations at church, school, and dinner parties.

Our people are smart, innovative, and excited! They come with ideas and energy that can help your business grow. It is particularly important during these times to listen to your people, solicit feedback, and build consensus on where your business will go next. Different positions within your organization will have different views of how the business is doing—their feedback can help small process issues get fixed or lead to the development of new programs and services.

And, if you're seen as an innovative, exciting, and successful business in your community, new opportunities may come your way. People are always looking for the next right-fit job. With your name out there as a great place to work, people with expertise in different fields may come to you with interesting ideas to grow your business.

Three things to do in your people operations in 2021

The year 2021 will be an interesting one for evaluating your business and its future. It's time to evaluate if you have the right people, if you're keeping the right people, and if you're properly planning for your future:

1. Evaluate your current people and roles.

The first question you'll need to ask yourself is: "How does our current structure support our organization's goals—and how has that changed in the past year?" Perhaps your organization has had a big influx of late seniors, and you were unable to serve them. Or maybe you're starting to see more students with mental health concerns who need a different educational environment. Is this going to continue? Are you prepared for future influxes in these areas?

Over the past few years, a lot of organizations have invested heavily in shifting their administrative burdens onto software. There are huge cost savings in replacing people with machines. But, in a virtual world, with limited or no face-to-face meetings, are fewer interactions the way your organization plans to go? Do you need to build in more time with clients? Do you need to hire people to help serve clients and ensure they have an excellent experience with you? Or maybe the software is doing really well for you, but it may free up resources to hire more direct service employees so that each person has a smaller caseload.

Next year, look at your organization's structure, your student-to-staff ratio, and your administrative overhead, and assess: what do I want this organization to look like by the end of 2021?

2. Develop a system for ongoing training.

One of the biggest reasons people leave their jobs is because they want more challenge and/or more support. They feel like they've "outgrown" their company or are not "seen" by their boss. Identifying people in your organization who have potential to grow into bigger roles is incredibly important.

You need to build in training, even for the most experienced employees.


But equally important to think about is how to take that identified talent and support and train them so that they are ready for new challenges. You need to build in training, even for the most experienced employees. Most overlooked in an organization is often the training and development of your veteran employees and your administrative employees. With your veteran, seasoned, experienced people, you may assume they know everything they need to know and, if not, they'll seek out their own resources. You don't want those people to feel like you're not supporting them. So, think about how you can support people who are very experienced in ways that are not "beneath them." Perhaps they can help develop trainings for others (and in doing so, learn more themselves) or attend advanced professional development programs in more niche areas. Your administrative employees need training too. Someone who has HR functions on your team can attend SHRM workshops, or administrators can be given responsibilities to evaluate new software tools.

Next year, think about who you have in your organization that may be ready for more. How will you support them? When do you want them to assume those new roles, and will they be ready?

3. Ensure fairness and set yourself up for growth.

Employees all come with their preconceived ideas about what it will be like to work for an organization. Many independent educational consultant practices are relatively small businesses, and the people who join them may have expectations that come from a larger organization or may feel like they can take advantage of your small size and collegial work environment.

In 2021, plan to review your people operations policies. Codify how you want your workplace to operate by creating or updating your employee handbook. Think through topics like compensation, performance reviews, workday and response time expectations, paid time off, professional development budgets, use and return of company property, and more.

While many of these areas are ways to protect yourself and your business, employees will also see this as a way to better understand the terms of their employment and the advantages to being part of a group. The predictability and uniformity of how you treat people will be important as the team grows. 

Planning for the Future

By Belinda Wilkerson, EdD, IECA VP for Ethics & Professional Practices (NC)

Calendar year 2020 stopped us all in our tracks and forced us to reevaluate how we conduct our personal and professional lives. Most independent educational consultants are now 100 percent virtual with some folks conducting socially distanced meetings. We do not know where this virus is going to take us, so we must plan for the future. With that in mind, the Ethics Committee is examining all relevant documents and policies with the goal of ensuring what we have in place will serve our membership in years to come. I'll get back to that further in the article.

What are some of the top concerns of our members as reported to the Ethics Committee? These are not in order of number of reports; however, they are the four concerns that rise to the top.

Credentialing/Logo Use

Yes, this is an ongoing issue and some people may view it as trivial, but we know credentials and professional licenses are an important part of establishing oneself professionally. IECA has a wonderful handout that explains the differences (link.iecaonline.com/IEC-credentials). Here's an example of the difference in professional credentials with similarities in other fields. I am a certified professional school counselor. I completed a master's program in school counseling and I sat for the Praxis Professional School Counselor Test for that certification. There is a credentialing agency (local Department of Education) supporting that designation. On the other hand, the American School Counselor Association (ASCA) offers a number of "specialist" designations. The requirements include, but are not limited to, reading articles, viewing webinars, and taking quizzes periodically. Once complete, ASCA issues a specialist certificate along with five CEUs and 50 contact hours and it may count, depending on the school, towards graduate credit. Review the cultural competency specialist requirements at bit.ly/steps_ASCA_CC

When someone misrepresents their credentials or uses the incorrect logo, the Ethics Committee and/or

IECA staff will contact the member with a reminder. Please know that the Ethics Committee is not policing members' websites, but we do respond to concerns when this issue arises. See the logo policy at: link.iecaonline.com/logo-guidelines

Member Network Etiquette

Monthly reports of questionable behavior on the network continue. When asking a question about colleges, schools, or programs, include your research with the request. This helps other members assist you without unfairly using their time. If you disagree with information from a member, respond to that member **privately**. Courageous conversations and civil discourse work. If having a conversation does not resolve the situation, then let the Ethics Committee know.



Student Misrepresentation of Activities

Students may inflate their participation in activities, and you know it's a misrepresentation. Suggested action is to have a conversation with the student and parents/guardians about your concerns. What do you do if the family feels the information is correct and you know it is not? Remind the family a submitted application indicates the applicant is attesting to all information within the application as accurate. As the IEC, you will decide if you will continue with this family or not if the application is to go forward as is. The bottom line, it is the student's application.



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It Is All About Risk, from page M8

I often borrow the phrase “I am not Willy Wonka and there is no sugar coating” in my practice. I believe I owe it to my families to discuss indicators that may reflect a school’s financial well-being. At the same time, I never want to call out a school and, inadvertently, cause harm to its reputation.

I believe the bottom line has to do with risk. When we purchase a house, we have it inspected and assume risk in the purchase, doing research and making assumptions that the house and location are a good investment. Parents need to do the same when assessing the investment in their student’s future education at any school. I believe it’s essential to discuss risk and help our clients understand and mitigate it when possible.

If parents want to research the financial health of a private school, they can review its Tax Form 990. However, most of us are not that familiar with accessing and understanding tax forms and there are easier ways to assess and compare schools. I believe we can obtain a fairly good indication of a school’s financial health by using the Common Data Set (CDS) over a five-year period of time, school reports, and a visit to the school.

For new IECs unfamiliar with the CDS, it is an annual report most colleges share publicly where: “The stated goal is to provide accurate and timely data to students and their families while decreasing the workload of administrators. In producing their popular publications and rankings, these publishers “ask the same core questions” of institutions using the Common Data Set to define those questions and their responses.” Additionally, many colleges share program information and the composition of their freshman class, which can be used to ascertain growth and quality of students admitted. If a school does not share the size of its departments, it is important to ask for that information to assess risk. We owe it to our families to empower them to ask tough questions to school officials.

Specific areas of research can include the following:

- First Year Enrollment (Is the school growing? Declining? Stable?)
- Retention Rate over Time (Median is 70 percent; you should be concerned if it is below that)
- Discount Rate (The higher the discount, potentially the more desperate the school)
- Acceptance Rates (A very high admit rate with a low grad rate may be a concern)
- Graduation Rates
- Hechinger’s Financial Fitness Tracker: <https://tuitiontracker.org/fitness/>
- College Navigator: [NCES.edu.gov](https://nces.edu.gov)
- Moody’s Bond Ratings: <https://www.moody.com/>

Simply put, if a school has declining enrollment, high discount rates, low retention, and low or declining graduation rates, students run a higher risk of not graduating. One can assume schools that have small enrollments, are located in rural areas, and lack strong regional or national brand names will be riskier investments than more well-known schools. Conversely, if a school is growing their student body, retention/graduation rates are high, and they have a reasonable acceptance rate, the financial risk is less for the family.

It is important to also recognize that institutions will likely have to cut programs to offset their recent financial issues. Tulane eliminated entire programs to weather the post-Hurricane Katrina storm. As IECs, it’s essential that we discuss with students the size of the programs they are planning to pursue. A creative writer headed to a school with a small English department will be assuming more risk than a student headed to a larger writing program and English department. I realize this all sounds simplistic, but, sometimes the simple things are hard to recognize during stressful times.


I caution my families not to overemphasize one data point. Schools with engineering programs, co-op opportunities, and performing arts conservatories can have skewed graduation rates. Additionally, a student might find that a school with some financial challenges may still be the best fit. In the case of my creative writer example, the student can mitigate the risk by planning to graduate early and picking classes that will more easily transfer.

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Endowments are often viewed as an indicator of financial health. The truth is, most schools with large endowments are national brand institutions with a large alumni base and therefore, low risk investments. However, it does not mean they will not cut underperforming programs or non-revenue sports. Additionally, endowments are typically earmarked for specific usage.

I also believe families should look at what the school is doing now to offset costs. A week into COVID, my family reevaluated every expense in our family budget as we prepared for the unknown ahead (yes, we cut Disney+). If colleges are not taking serious actions now, they may be at a higher risk later.

Finally, a potential way to judge a school’s financial well-being is a simple eye test during a visit. You have likely visited a school that you knew appeared overleveraged and challenged. Indicators may include lack of construction, lack of the usage of new technology, and run-down facilities. Visits can be another data point to add to the overall risk assessment.

Our families are stressed and often in their own echo chamber. As IECs, we have the unique opportunity to help them research and plan for one of the biggest investments of their lives. We say the worst investment in education is the one where a student does not get a degree. We can offer additional value to families by providing them with the tools, guidance, and education to ensure their dollars are well spent. 



What's Your Solution?

Best Online Tools for Collecting Payments

In response to a post on the Member Network from *Lee Bierer* (NC) seeking advice on the most cost-effective online methods for collecting client payments, more than 40 IECs shared their suggestions.

Many advised accepting **multiple forms of payment**:

- At this point I pretty much do whatever the parents want whether it's Venmo, Zelle, PayPal, bank transfer, or check.
- I take checks, Zelle (which isn't terrible, but clunky), and Venmo.
- I use Quickbooks which, while not the cheapest, allows me to keep track of a la carte services. We offer a number of ways to pay: Chase Paymentech or ProPay, with an additional 3% fee, or Zelle, check, or cash, with no added fee.
- I use Square, Venmo, Zelle, and PayPal or let them mail me checks.

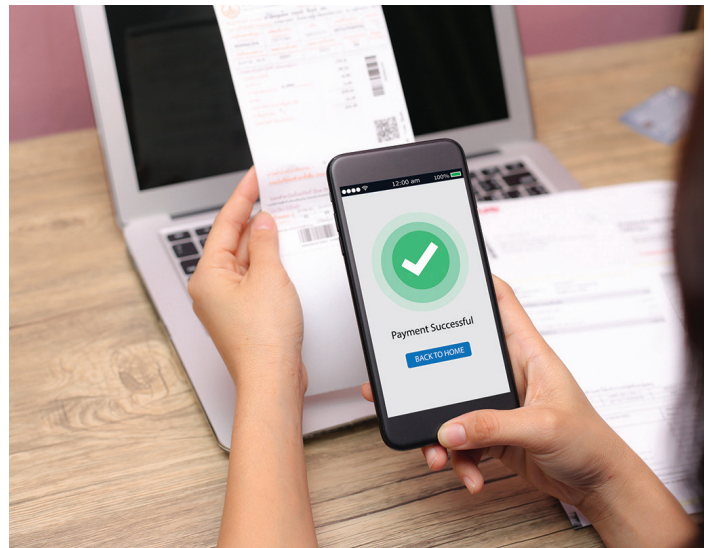
Although many people commented on the ease and convenience of **Venmo**, several IECs noted that it is not intended to be used for business purposes. On the Venmo website, it states:

Venmo is designed for payments between friends and people who know and trust one another. You may use Venmo to pay for goods or services using a Venmo Debit Card at merchants that accept the card, through mobile websites or apps that are approved to offer Venmo as a payment option, or using your in-store QR code at select merchants. Additionally, you may use Venmo to pay for goods and services when directly given the option to do so by Venmo. Venmo may NOT otherwise be used to receive business, commercial or merchant transactions, meaning you CANNOT use Venmo to accept payment from (or send payment to) another user for a good or service, unless explicitly authorized by Venmo.

Others suggested using **Zelle** or an alternative option provided by the IEC's bank:

- If your business account is with a bank offering Zelle, you'll find it terrific. There's no fee involved and payments are transferred from clients' accounts instantly.
- I would encourage you to utilize the Merchant Services option in your bank as the safest way to take payments.
- We started doing electronic payments via Zelle or Chase QuickPay a couple of years ago. [Some clients' banks] have a daily limit (like \$500), so they pay over multiple days.
- I only use Zelle or a paper check. I have my business account set up with Chase and they are super friendly to small businesses with Zelle.

- My increasingly popular option for larger packages is simple wire transfer from bank to bank. You need to give them your account information, but my bank just charges me \$15 for a wire transfer so I don't pass that cost along.




Many IECs prefer **PayPal**, which enables invoice creation:

- I set up a PayPal business account and bill my clients via PayPal invoice. The interface allows you to create an invoice, add your business logo, etc. You can allow them to pay it in increments or upon receipt, however you set it up. Send the invoice directly from your PayPal business portal. The client can pay by whatever means they choose, and they are not charged a fee, but I am charged about a 3% fee. The money paid stays in your PayPal business account until you instruct PayPal to move it to your bank account. Moving it "instantly" will cost you a fee but moving it "standard" is free and goes through in 2-3 days. I absorb the fee as a cost of business.
- I use PayPal and list the transaction fee as expenses on my tax return.
- I exclusively use a PayPal business account, separate from my personal PayPal account. I generate an invoice through College Planner Pro and include it as an attachment when invoicing via PayPal. I absorb the credit card fee as a cost of doing business and honestly most clients use a credit card.
- I use PayPal because of invoices it produces, which is more professional. There is a 3% discount if a credit card is not used.

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Referrals

This is an area that concerns members frequently. I am grateful that the Ethics Committee is partnering with the Business Practices Committee as we tackle this perennial conundrum. In the *Principles of Good Practice* (PGP), it appears clear cut; however, with the number of inquiries, it's important to examine current policies.

The review of documents and materials in collaboration with the Business Practices Committee will help ensure we're providing our members with policies and practices that align with the future of doing business. What can you do? Review the *Principles of Good Practice* (link.iecaonline.com/POGP), the *Standards of Excellence* (link.iecaonline.com/standards), and the Member Network Terms and Conditions (<https://network.iecaonline.com/termsandconditions>). Let us know your top two concerns—just two, please. Look for details on how to share your concerns on the Member Network and in 5 Minute News. 

2020-2021 Professional Membership Directory

Keep an eye out for your new Professional Directory, which was mailed to all members in October. If you'd like additional copies, use the Member Publication Order form: <https://link.iecaonline.com/marketing>



Collecting Payments, from page M9

- I use PayPal, as the fee seemed lowest when I made my decision. I like that it can create an invoice and track everything. I initially thought to charge a separate fee for credit card use, but I later found out that doing so is not allowed.
- I use PayPal on my website which is fairly easy for people. The cost of using it is just incorporated into my overall fees in recent years since checks are becoming less common. I used to give a discount for checks but no more.

Square was another preferred method:

- We use Square and we collect half at signing and half in September of senior year. We don't pass along the fee, but we do offer a "discount" for families who pay upfront in full by check.
- I use Square for credit card payments. I add the service fee.

With regard to Bierer's question about how to handle fees, there was a range of responses. Some IECs pass the service fee on to their clients, while others prefer not to do so:

- We just eat the transaction fee as a "cost of doing business," like rent, utilities, etc. It is tax deductible.
- In some states, credit card surcharges are illegal. And, breaking payments into pieces could trigger weird loan laws; a big payment plan could trigger it becoming essentially a 0% interest loan, which would require specific documents. Cash or check are good. And credit cards where you eat the fee. All those are good to go.
- I take credit cards for hourly clients and do not pass on the fees to them. I'd rather get paid on the spot, even if that means netting 3%

less. I discourage credit cards for comprehensive service by telling them that there's a 3% upcharge.

- I would not charge extra for the card fee but rather build it into fees. I do not keep the credit card for security reasons. If they want to pay by card, they indicate that on their contract and we send them a link to pay online (we use PayTrace for that).
- I take credit cards and charge a 4% finance charge.
- Raise all prices by 3% for new clients. Eat the fees on all transactions because nobody wants to be nickel-and-dimed.

Other suggestions from IECs included:

- I send invoices through **Zoho** which is attached to **Stripe**.
- I use **Stripe**, which automatically sends you the funds in a couple days without your having to request their transfer. This is a huge plus. [It has] similar fees to PayPal or Square.
- I use **Dubsado** and all proposals, contracts, and invoices are created in there and sent to the prospective clients. I've integrated Stripe and Paypal with Dubsado for payments.
- I added the credit card feature in College Planner Pro, which I've been very happy with. It is incredibly easy to set up, and you can track student hours in the time tracker and then import them into an invoice. When you send the invoice to the parent there's a payment button in the email they receive. Very efficient, and the fees are roughly the same as PayPal.

While many IECs advised continuing to receive "old-fashioned" checks, another stated, "Credit cards are the most frictionless way to collect money. It took me YEARS to come to grips with this." 