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IECA<sup>+</sup>

# INSIGHTS

THE NEWSLETTER OF THE INDEPENDENT EDUCATIONAL CONSULTANTS ASSOCIATION

## Calendar

**Visit the Member Network  
for the most up-to-date  
information on IECA events.**

### October 5

College Conversations:  
Gonzaga University

### October 13

Webinar: Two Schools'  
Innovations to Ensure Their  
Graduates are Prepared

### October 23

Associate & Student Members  
Virtual Roundtable

### November 10

Webinar: ACT Changes: What  
We Know Now

### November 16–20

IECA Virtual Fall Conference

### November 26–27

IECA office closed for  
Thanksgiving holiday

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October/November 2020

## Helping Our Members Succeed and Thrive, No Matter the Challenges

*By Mark H. Sklarow, IECA CEO*



Our new membership year, IECA's 44th year as a professional association, began on July 1, 2020. In a year when the vast majority of professional associations are seeing declining membership numbers and significant revenue loss,

we began our new year on firm financial footing with a 12 percent **increase** in membership over the past six months. What accounts for this success? In a word: value.

Over its 40-plus years, IECA membership has been the gold standard for the profession of independent educational consulting. We are the largest organization representing IECs in the world, with more than 2,300 members hailing from nearly every US state and more than 25 countries worldwide.

Each year, IECA sponsors dozens of campus tours and educational events, including two national conferences, our Summer Training Institute, retreats, symposia, and webinars. We believe one of our primary responsibilities is to keep members connected and we do so through our regional groups, affinity groups, mentor program, online Member Network, and numerous other networking opportunities.

When faced with obstacles, IECA rises to the challenge through our amazing corps of volunteer leaders working with our professional staff. Thanks to the strength of our member community and our national office's driving focus on supporting you, our members, we have made it through uncertainty and adversity over the past year and a half.



On March 11, 2019, the day the Varsity Blues Scandal broke, many IECA members voiced to me their concern that this scandal would be the end of the IEC profession. I was with many of our members in Atlanta on that fateful day. I met by phone with IECA staff that morning and we had one question: Right this minute, what do our members need from us?

*continued on page 5*

## President's Letter

# Finding Thankfulness in Challenging Times

As we approach the time of year when we focus on what we're most **thankful** for in our lives, I'm going to say something that might surprise many: I am **thankful** for the year 2020. That's right. While others would likely not use the word "**thankful**" to describe what has been one of the most difficult and emotionally trying years in the lives of many people, I'm going to argue that it fits. Being home with my family for most of the year has given me the opportunity to see my children grow—physically, socially, and emotionally—right before my eyes. We have had serious conversations about the effects of the pandemic on our world, and

meaningful discussions about the issues of race deeply impacting the US. I am **thankful** to have had the chance to hit the reset button on priorities and to sharpen my focus on what truly matters in my life. I am **thankful** for the reminder this has given me to focus on my own personal health, something that I'd pushed aside for a decade as a working mom of young children. In turn, my dog is **thankful** for the multiple daily walks he is getting now that I am working from home again.

In my work as an IEC, I am **thankful** to be able to support families and students struggling with the uncertainty that is impacting the education landscape due to COVID-19. They have been **thankful** to me for reminding them to focus on what they can control and not on the unknown. When I meet with my students I am reminded that teenagers really are amazing, and I am **thankful** that I have

the chance to work with them each day. Each one is different and I am **thankful** that I get to see the current world through their fresh eyes. This has given me the opportunity to hear different perspectives about the impact of the many issues 2020 has brought to the forefront. For this I am **thankful**.

As an IECA member, I have been **thankful** over and over throughout this past year for the incredible colleagues we have within our association who have stepped up to support one another in these difficult times. During our first Virtual IECA Town Hall in August, I was **thankful** that I could publicly acknowledge—with our newly created IECA Service Award—just a few of these members who have gone above and beyond to help their IECA colleagues: Gail Curran, Jennie Kent,

*continued on page 6*



Kristina Dooley

## IECA<sup>+</sup> INSIGHTS

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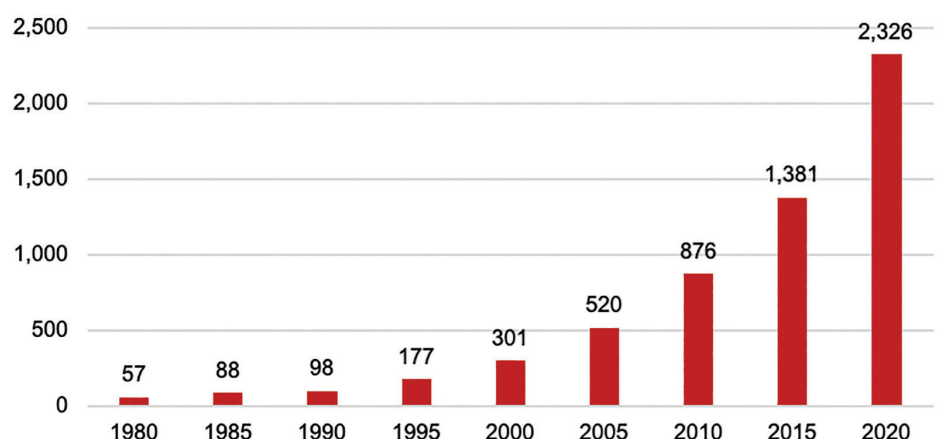
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## In Focus

IECA's Membership Growth 1980-2020  
(Includes all membership levels)





# Join Us for the IECA (Virtual) Fall Conference

Monday, November 16 –  
Friday, November 20, 2020

Our Spring into Summer Virtual Conference was a huge success, with 80-plus sessions attended by 1,200-plus attendees logging into our conference platform 18,000 times! Now IECA is gearing up for the Virtual Fall Conference, which promises to be an equally interactive, engaging experience that you can attend from the comfort of your own home.

**Will this be your first virtual conference?** The IECA Virtual Fall Conference is designed to provide education, networking, and all the flexibility you need! Choose from a menu of fantastic options and participate at your own pace in a way that is most comfortable for you. Watch presentations live and participate in the Q&As or view them at your convenience later. Explore the Exhibit Hall and leave your contact information for college, school, and program reps, or join for the dedicated live times for different Exhibit Hall categories. And be sure to stay online for the fun after-hours virtual receptions offered by sponsors!

There is so much educational content that you'll need more than one week to view it all—which is why all educational sessions, Q&As, and tours will be available to registrants until **December 30**.

## Pre-Conference Presentations and Live Q&As

### Monday, November 16

Law School Admissions  
Content Marketing for IECs  
Continuum of Care

**Virtual College, School, and Therapeutic Tours**

### Tuesday, November 17

Where's the Money: College Affordability  
Consulting for Neurodiverse Students  
What's Going on with China?

**Virtual College, School, and Therapeutic Tours**

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and for more details.

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## About the Adolescence, Consulting, and Education (ACE) Speakers

These renowned thought leaders will conduct 15 to 20-minute dynamic, energetic presentations to kick off the day's programs Wednesday, November 18 through Friday, November 20.



**Ravi Hutheesing** empowers education and business leaders to pivot for success in multicultural and multigenerational environments. Born into a lineage of prime ministers and raised by a family of Wall Street bankers, his journey as a rock star, aviator, and cultural diplomat for the US Department of State is an inspiring example of how to stay relevant while positively impacting the world.



**Sarita Maybin** shows her audiences how to transform uncomfortable conversations into straightforward communication. With real stories, real solutions, and a relatable presence, she breaks down barriers to reveal how to work together better. In her 20-plus year career as a professional speaker, this former university dean has made it her mission to motivate others to embrace positivity, even amid the challenges of our ever-changing high-tech times.



**Jeffrey Selingo** offers a hopeful, inspiring blueprint for how students can make the most of their undergraduate years and how colleges and universities will evolve to better meet the needs of society in the 21st century. He has written about higher education for more than two decades and authored three books. Selingo is a special advisor and professor of practice at Arizona State University, a visiting scholar at Georgia Tech's Center for 21st Century Universities, and the former top editor of the *Chronicle of Higher Education*.

A photograph of a woman and a young girl, likely a mother and daughter, holding hands and looking at each other. The woman is on the right, with long dark hair, wearing a mustard-colored sweater. The girl is on the left, with her hair in a bun, wearing a black and white striped shirt. They are both smiling and looking at each other. The background is a bright, out-of-focus window.

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We agreed that IECA members needed:

- Language to share with their clients
- Talking points for the press
- An alternate message about parent anxiety
- National media coverage demonstrating why parents need IECs and the ethical value that guides IECA members

By supporting our members along these guidelines, we emerged stronger than ever.

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### *Right this minute, what do our members need from us?*

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From there, our new membership year, running from July 1, 2019 to June 30, 2020, began so well. We released several new publications on test accommodations, what colleges are looking for, and other timely topics. IECA staff took part in conferences throughout the fall. We ran a full-bus trip (remember campus tours?) to visit colleges in western Oregon and Washington. Our national conference in Atlanta brought us together for more campus tours (schools, colleges and programs), a new Educational Intensive in financial aid, and even visits from college mascots.

As the 2020 calendar year began, we held our largest retreat ever—in Arizona—with a focus on sharing and business. Our regional groups were meeting regularly, and I had the opportunity to join the Orange County group in California. IECA played host to a leadership meeting with NACAC and HECA. In March, we held our first Education Intensive combined with a campus tour in the Washington, DC area. It was a great success, and even included a visit to the IECA national office.

And then COVID-19 disrupted everything. By the end of March, our national office closed and all staff began to work remotely. Events were cancelled or postponed. We took steps to cut our expenses, including suspending contracts and enforcing staff furloughs. At first, we guided members on how to continue meeting in-person with students in accordance with CDC guidelines. Then things got more serious.

In the middle of this, 2020 also delivered a new awareness and awakening in many about systemic racial injustice, an issue that IECA is addressing in numerous ways, from education to operations.

Faced with myriad challenges, IECA staff came together again and asked the same question: **What do our members need right now?**


This time, we agreed the answers were information and connection. And before we could even act you—our members—came forward with resources to support one another. College Conversations replacing in-person campus tours. Google Docs tracking school and college testing requirements, operations, and other relevant data shared via the Member Network. Virtual Program Tours and a weekly Therapeutic Committee Zoom meeting designed to provide emotional support. Business Practices Committee webinars addressing current challenges. A new Black Affinity Group guiding the creation of cultural-competency curriculum for our members.

Special presentations, including one with Jeff Selingo, delivered virtually. And much more.

Then, in July, IECA staff members worked tirelessly to create something completely unfamiliar to us: a virtual conference that allowed for face-to-face discussions, high-level speakers, live Q&A, and, yes, some moments of levity and fun. A mere week later, we did it all again, this time with our first-ever virtual Summer Training Institute featuring 18 members as volunteer instructors and 168 attendees—our largest STI ever!

We faced new challenges and, again, we came out stronger than ever.

The sense of volunteerism among our members has never been greater. We have provided a continuity of service that admittedly, hasn't been perfect, but has made me exceedingly proud. In a time of great challenge, everyone—IECA staff, members, board and committee chairs—has stepped up.

As we look forward, we will remain nimble and innovative, committed to social justice equity and antiracism, and creative and dynamic as we navigate the new “abnormal.” While we don't know yet what the remainder of this membership year will bring, I do know that we will remain committed to making sure you, our members, not only survive, but thrive and succeed. **What do our members need?** This question will continue to be our lodestar. 

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Joanne LaSpina, Jeff Levy, and Marilyn O'Toole. Many members have reached out over the past year to sing the praises of these five IECs for giving so much time and energy to creating programming to support their colleagues, and to share how **thankful** they are for them. In addition to these IECs, I am **thankful** for our many members who have supported their colleagues in regional group gatherings, through our mentoring program, by answering calls for advice on the Member Network, and so much more. I am continuously reminded that even in the most trying of times, I am surrounded by wonderful people in our association who are so giving of their time, talent, and treasures.

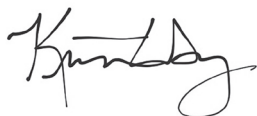
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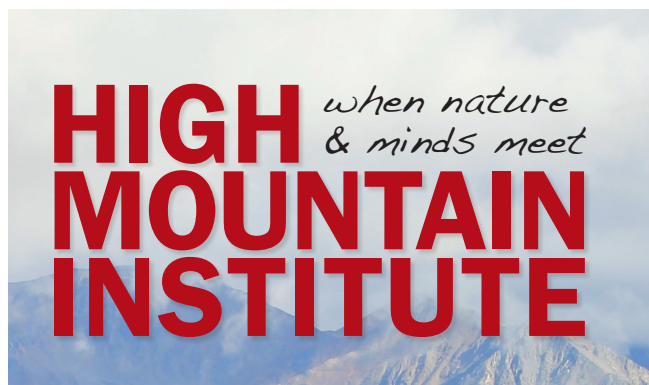
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Finally, I remain **thankful** to the IECA staff for their constant support of our members during these challenging times. They have worked tirelessly to ensure that our professional development continues, and that our connections with schools, colleges, and programs not only continue, but strengthen.

As we head into the last few months of 2020, I encourage you to consider the silver linings you are **thankful** for that this past year has brought you, and to reflect on how you can hit your own reset button. Consider how you can pay it forward—just as our IECA Service Award recipients have—and how you can support others in our profession and our association. Just as we are telling our students, think about the things you can control during these uncertain times and focus on doing those things well. As the late Maya Angelou said, “Be present in all things and **thankful** for all things.” Let us all be present for one another during these challenging times and **thankful** for the opportunities that lie ahead.



Kristina Dooley, MA, CEP  
IECA President



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# Jump-Start Student Learning with Technology

By Eric Endlich, PhD, IECA (MA) and Joan Green, MA, CCC-SLP

I recently had the honor of interviewing Joan Green, MA, CCC-SLP, Washington, DC-area speech-language pathologist and author of *Assistive Technology in Special Education: Resources to Support Literacy, Communication, and Learning Differences*.

**Endlich: Why is it important for independent educational consultants (IECs) to be familiar with assistive technology?**

**Green:** To help determine a good fit for a student, everyone needs to be sure that there are appropriate resources and services available. We take assistive technologies such as hearing aids and eyeglasses for granted, but they are critical for learning. There are other technologies that many of us may use and benefit from, but students with diagnosed disabilities need them to access the curriculum, stay engaged, and demonstrate knowledge.

Technology plays a vital role in every student's college experience. If IECs and counselors aren't aware of how technology can be used to help overcome barriers and take advantage of strengths, then it is more difficult to truly assess whether or not the environment will be a favorable one for the student.

Families expect college experts to know how students can use technology for vital tasks such as taking notes, staying organized, writing essays, studying, and interacting with other students, TAs, and professors. Some students do best if they can watch recorded lectures at their own pace prior to discussion sections. Others do best when they can have access to digital notes or slides prior to lectures. It's important to know whether students are permitted to record lectures and student interactions so they can learn in the moment and not be concerned with taking notes. These questions are important whether classes are held in person on campus or virtually.

**Endlich: What is the best way for IECs to come up to speed, so that they can advise their students more thoughtfully?**

**Green:** Reading this article is a great first step, as is connecting with colleagues who are well-versed in the use of technology to support college students. Also, reaching out and asking the office in charge of implementing student accommodations and learning support how they support their student body with the help of technology.



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Computers, tablets, and phones now come with built-in, powerful tools for students who learn differently. Are your students aware of the tech features they need to access content and be effective self-advocates? Students often need help setting them up and figuring out strategies for effective implementation.

I've written several books on this topic, and I provide online coaching and courses for families and professionals. I frequently speak on this topic online.

**Endlich: Which students should IECs be talking to about this subject?**

**Green:** Students who need help with organization and time management, as well as those who have reading and writing challenges. Many—but not all—of these individuals have had IEPs and 504s. Private high schools may have provided learning support informally.

Students who are at risk for getting overwhelmed and stressed, or who may have medical conditions that limit endurance, are also ideal candidates for using tech to make life easier in college.

**Endlich: When can students implement this technology on their own, and when do they need to request it as an accommodation?**

**Green:** If students require specific features provided by assistive technology, or certain benefits such as extended time on tests or priority registration, then they need to make sure they will have access to those features and accommodations in college.

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There are tools, like digital calendars and using text-to-speech and speech-to-text, that all students may benefit from, but that students may require assistance using to increase success. If the university is flexible in letting the student use whatever means they need to access content and show what they know—and if they provide videos and notes ahead of time, and accessible content to everybody proactively—then maybe students don't need an accommodation. It may suffice if they are entering college with confidence about how to set themselves up with these tools, and if they are already strong self-advocates.

*COVID-19 has forced us to rely on technology for classes. The traditional in-person lecture format has been replaced, at least for now.*

Even if courses are online, sometimes not all digital content is accessible to individuals who have reading and vision-related disabilities. Some universities are fine with everybody using features available on the devices we already use. So why not use them in order to help with reading and writing and organization? Other places have frowned on the use of technology because it presented yet another source of distraction for students.

**Endlich: What kind of impact are you seeing of the pandemic on how students are interfacing with technology?**

**Green:** There's a scramble now for students, as well as educators, to become more tech-savvy very quickly. The use of technology is no longer in question.

COVID-19 has forced us to rely on technology for classes. The traditional in-person lecture format has been replaced, at least for now.

It's really helpful if students develop skills such as using notifications and reminders to use their time efficiently, setting up effective digital management systems to quickly find what they need online, splitting their screens to participate in online sessions, taking screenshots to capture images on the screen, and capturing notes that are synced to audio and visual content.

In a negative sense, many of us are in Zoom meetings all day; it's tiresome. We're not getting physical exercise or seeing people in person. And you miss the camaraderie; you don't get a lot of the social-emotional benefits.

**Endlich: Can you give me some examples of really useful tools that many people don't know about?**

**Green:** The first two are speech-to-text and text-to-speech. You can have text highlighted and read out loud to you with different voices and at different speeds. If you're on an iPhone, often you just set this up in the accessibility settings. You can just select words and have it read out loud. If you're in a Google Document or Microsoft Word, it's a feature that's already there. In the newest Edge browser,

*continued on page 10*

even PDFs can be easily read aloud. A lot of people don't realize that that exists, as well as the ability to just talk and have the words turn into text, whether you're in Microsoft Word or Google Docs or sending a text message. It's just a matter of configuring the settings.

I'm very focused on distance learning. If you don't have multiple monitors, it helps to be able to split your screen, so you take notes on one half and participate on the other half. A split screen is also helpful as you read an article and type up an essay so you don't have to keep switching back and forth between tabs. Many students that I'm seeing aren't that tech-savvy with a lot of these skills.

**Endlich:** You've mentioned the importance of notetaking. What's important for people to know about notetaking and how they can develop that skill?


**Green:** A lot of people who might have ADHD or reading, writing, or language problems struggle to process information and learn while they're taking notes. And if they try to write something down, they miss content. Much of what we're doing these days is listening to lectures. In distance learning, many professors may end up flipping the content: not giving live lectures, but providing videos so students can learn at their own pace. They can capture a screenshot, stop the video and take notes, and then continue. And if there is synchronous learning—having real-time live debates or conversations, I like that much better. Students get together and have that socialization and interaction.

**Endlich:** So students who have trouble processing, who can't listen and take notes simultaneously, actually do better with asynchronous distance learning, because they can pause, take notes, and absorb the material better. People may complain that online learning is not as good, but for some students, it may actually be beneficial.

**Green:** And people with physical/health-related issues can learn at their own pace. So for some students that's good. I look for the silver linings. This is going to make people realize that a lot of these technology features are good for everybody. They just become assistive technology when without them you're unable to learn.

**Endlich:** Any other important advice for IECs?

**Green:** Technology can be a student's friend and help them to be much more successful in college. These tools are included in our devices now. You don't have to spend hundreds of dollars to get a good dictation software or text-to-speech package, but you do need to know how to use it. So it's really helpful to have some support at the university to enable these features, and to work with a student on fine-tuning to make it more successful. And that can be done from a distance or in person.

*Learning how to learn more* about these supports is critical. Once students know that they might want to do something like dictating to Google Docs, then they just search for a video tutorial. Look at this with a problem-solving approach. Because there's so much information—you just have to know what to look for. 

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# Unforeseen Advantages of Virtual Learning

*By Gina Apicella, MS, BCBA, LBA, Vice President, Autism Services, Chapel Haven Schleifer Center and Carolyn Gorman, LPC, ATR, Supervisor, ASAT Program, Chapel Haven Schleifer Center*

When the COVID-19 pandemic began, educational settings were faced with the unplanned, immediate need to create innovative ways to prevent regression and continue to provide ongoing instruction. In many ways, this need turned out to be more of an opportunity to reach students in ways that had not been anticipated. With the use of an online video conferencing service to link all of our students together, everyone has the ability to both see and hear each other and share screens as needed. As you can imagine, there are many disadvantages to online formats over having class in person; however, in a relatively short time, we have come to realize that there are also many unforeseen advantages.

This has proven especially true for students with Autism Spectrum Disorder. Deficits in social-emotional reciprocity, nonverbal communication, and difficulty making and maintaining relationships are some of the barriers individuals with Autism Spectrum Disorder (ASD) face in their daily lives (American Psychiatric Association, 2013). In addition,

there are high prevalence rates of psychiatric comorbidities such as ADHD, anxiety, and OCD in those with ASD (Romero, M., Aguilar, J. M., Del-Rey-Mejías, Á., Mayoral, F., Rapado, M., Peciña, M., Barbancho, M. Á., Ruiz-Veguilla, M., & Lara, J. P., 2016). All of these factors contribute to potential difficulties in a learning environment.

In many programs for adults with ASD, such as the ASAT program at Chapel Haven Schleifer Center, instruction is focused on social communication and independent living skills. Instruction is provided in small groups and individually, and is most effective when it happens in the natural setting. With stay-at-home orders in place, many are not doing their usual activities in natural settings, creating the need for new natural settings for everyday activities such as work, grocery shopping, and socializing with friends and family. This new setting is most often utilizing technology—the same technology many

*continued on page 13*



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individuals with ASD have enjoyed using in their downtime, and that they have a great amount of expertise navigating.

Navigating the online world is observed to be a natural strength of many of our program participants. In taking this natural strength into consideration, a task that one is accustomed to and comfortable doing typically requires less effort than one that is not within one's repertoire. As with anyone, when our students understand something at the level of being able to help someone else to understand it or explain it to someone else, a sense of confidence is evident. Building on a strength typically leads to a more reinforcing environment, assuming praise and attention from peers or an instructor are desirable for an individual.

As a participant of virtual learning, it has been noted that some individuals have benefited from being able to control their surroundings in a way that they know to be most conducive to their learning. For some, this may mean being in a room alone without any distractions and with lighting of their choice, seating that feels most comfortable, and the choice to disable audio or video. These options have allowed individuals to access information that they might have otherwise missed if they had only had the option of fully attending (in person or virtually).

Preliminary attendance outcomes maintained by Chapel Haven suggest that in some cases, the barriers that are removed with the shift to a virtual format have had a positive impact on attendance rates of individuals who have otherwise struggled with attendance.

One participant had an average attendance rate of 50 percent from January through March 2020, but has a 100 percent attendance rate, with the exception of a few late arrivals, since shifting to virtual learning. The number of classes the individual is taking each semester has not changed, however, the barriers of in-person attendance are no longer relevant with virtual learning. The virtual learning format has quite possibly mitigated barriers that were impacting this individual's ability to fully access programming.

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*...it has been noted that some individuals have benefited from being able to control their surroundings in a way that they know to be most conducive to their learning.*

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Relatedly, it may be no surprise that accessibility has been advantageous in other ways as well. There is an ability to reach a much broader group of students, both in terms of socioeconomic status and physical location. The new virtual offerings of the ASAT program have been able to reach students in a range of other states for a reasonable cost, giving individuals who may not have a suitable social network while at home during the pandemic the ability to connect with others and to have access to a robust curriculum and recreational offerings (virtually).

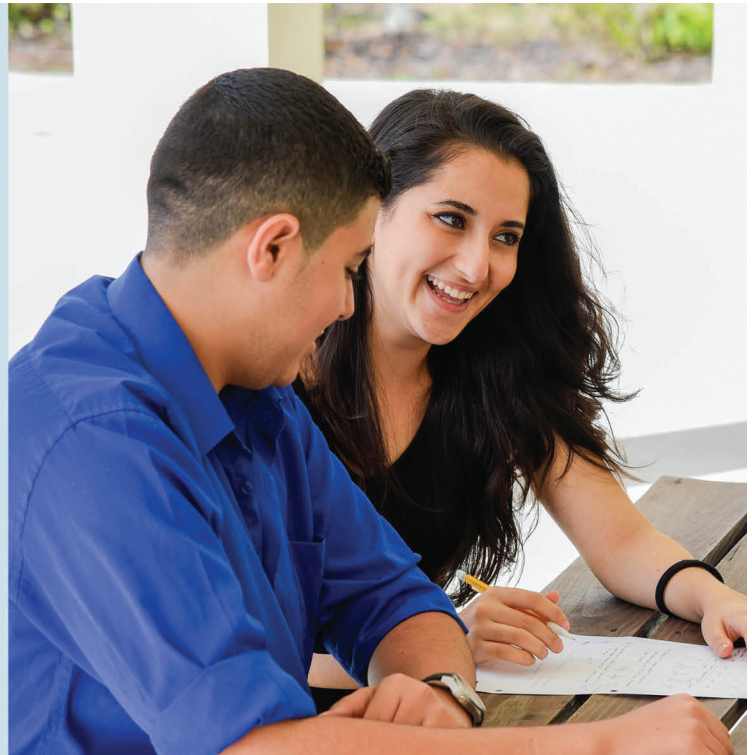
Within our social communicative curriculum, difficulties with reciprocal conversations, or "turn taking," and the ability to

*continued on page 14*

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filter thoughts or know when to end a conversational topic are addressed. When used thoughtfully, features such as the ability for the facilitator to mute participants and for students to privately chat enable the facilitator and students to learn about and model these social nuances. For example, a student who is repeatedly upset with a peer could be able to quietly resolve the problem in real-time over private chat with the instructor without interruption to the class.

The online format means that most students are taking classes from their familial homes. The virtual teaching format creates a window into the students' home environments. Through this window, teachers are better able to understand where each student is coming from and how to address those needs. Within some classes, participation or assistance from parents or family members may be helpful, such as in a virtual cooking class. Parent-student relationships can also be positively affected by virtual learning formats. In some cases, they have given parents the opportunity to better understand what each individual is learning and an ability to help reinforce those areas in the home environment. This has also given the students a chance to be able to generalize previous on-campus learning across settings with the guidance of an instructor.

The planning and preparation for classes such as virtual dinner prep have also given students executive functioning modeling and practice. While they are receiving assistance, they have been required to know what they are cooking week to week and to have ingredients ready for their class times. Virtual classes during

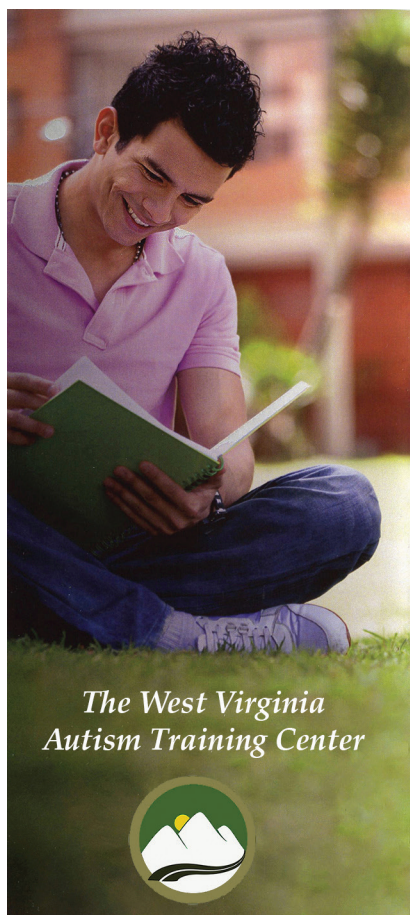
a pandemic have also required students to do a bit of problem-solving. Sometimes the exact item they need for a class is not available. They have learned to be flexible, to substitute ingredients or art supplies, to adjust to new technology, and to complete tasks under less than ideal circumstances.

Given that the virtual format is new and will continue to be modified as outcomes are measured and data is analyzed, the expected challenges have surprisingly been rebutted with unexpected anecdotal and observed advantages. As a program committed to providing high-quality programming to increase the independence of adults with social and developmental disabilities, the virtual learning format has allowed the individuals we serve to continue to work toward reaching their goals and to stay connected with their peers and staff. There are more opportunities to begin the journey toward independence as part of our community than there have ever been, and it has come on the heels of a worldwide pandemic. 

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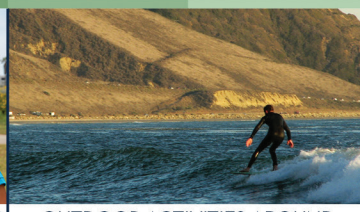
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# Concourse Global Clearing: A New Movement for Access and Equity

*By Jamie Kanki, Head of Engagement, Concourse Global, CT, and Emily Dobson, Lead Counselor, Second Chance, Porto Alegre, Brazil*

## Soul Searching within Higher Education

The call to reinvent the college admissions process is not a new one; however, it has rightly become a mainstream topic. College admissions scandals and the pandemic have created an aerial view of what has been and forced stakeholders to consider what could be. Finding new ways to serve and engage students at a distance while navigating constant changes within their own offices, schools, and campuses has left many feeling both exhausted and overwhelmed.

As with many crises, calls for action are ringing loudly. Risk-takers dedicated to the education field are brainstorming, sharing, piloting, and advocating. Concourse Global (CG), an innovative online platform, has reimagined the flow of

communication during the application process. Concourse's Global Clearing tool has quite literally flipped admissions on its head.

## Reinventing the College Admissions Process

For universities, the traditional in-person recruitment and passively-waiting-for-applications approach was ripe for an improved model. Concourse Global allows universities to travel virtually and connect with students in lesser-known or hard-to-reach regions that they typically would not have accessed via face-to-face recruitment. Rather than forcing them to spend months researching various application systems and gathering combinations of documentation, sweating

*continued on page 18*



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*Emily Dobson can be reached at [msemilydobson@gmail.com](mailto:msemilydobson@gmail.com)*

over a lack of specific exams, assessment-style, or letter grade, Concourse Global Clearing asks that universities meet students where they are. For students and their counselors, receiving offers (sometimes as many as 10 or more) over the course of one event week is exciting and often relieving.

In some ways similar to the UK's UCAS Clearing, where students without university offers are matched to university places not yet filled, Concourse flips the power structure and allows for global results. Relying on participation from students, their counselors/coordinators, and universities, Concourse Global Clearing is collaborative, transparent, and FAST.

Students fill in a profile outlining their academic history, extracurricular activities, preferred learning styles, and program(s) they are interested in. Counselors certify the information and then nominate the students for Global Clearing events. (In contrast to UCAS Clearing, Global Clearing happens multiple times throughout the year and involves universities—as the name suggests—globally. Each round lasts only a few weeks, making it an efficient and high-impact event.) Once nominated, student profiles are reviewed by participating institutions that make direct offers of admission to their programs, sometimes specific or, depending on the student's preference, offering a place within a range of programs. The platform is built for collaboration between students, their counselors, and universities. Admissions officers can pose questions about the students and communicate directly and easily with counselors. In a time when counselor insight and “added

color” has become paramount to understanding where a student has been and where they are now, Concourse enables a candid and important conversation to happen.

Highlighting communication and initiative, Concourse sends regular reminders and nudges to keep stakeholders engaged and moving forward. Students are encouraged to take the lead and book virtual meetings with the universities to discuss the details of their offers, ask questions, and learn about next steps. Collaborative meetings, often also attended by the students' families and counselors, are intimate and intensive, allowing students exclusive time with a university official.

---

*Collaborative meetings, often also attended by the students' families and counselors, are intimate and intensive, allowing students exclusive time with a university official.*

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## In Practice: Blue Skies and Second Chance

In May 2020, Concourse Global launched two pilot programs: Blue Skies and Second Chance.

**Blue Skies** was launched to test the flexibility of global university admissions and the new idea of “active admissions.” Blue Skies primarily served students who either had no university offers, or who, due to any number of complexities, were suddenly faced



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with the daunting task of searching new regions of the world for their studies.

The idea of Blue Skies meant that for students, offers would come “out of the blue.” The pilot involved 17 universities from Australia, Canada, New Zealand, the UK, and the USA and about 50 students from nine countries, resulting in 180 offers of admission and more than \$1.5 million in scholarship offers.

**Second Chance** was a very special initiative—an offshoot of the Nepal Justice League’s movements led by industry leader and global “SHEro,” this time led by a UWC Singapore-based counselor, Joan Liu. Both initiatives were grassroots efforts that helped place high-achieving, low-income students who had been financially gapped, waitlisted, or rejected, primarily by US universities, “geo-swerve” to other universities around the world. What the teams did, under Liu’s guidance, also reimaged admissions practices. In a space of time that is never considered viable, during the season when most applications are closed and almost all budgets are capped, and with the May 1 decision deadline looming, the progressive thinking of the group along with the centralization of information through Concourse Global’s platform, created magic. Not once, but twice.

Second Chance was a group purposefully built to navigate the same “dead space” and challenges: to give rejected, waitlisted, or gapped students a chance to receive offers or to apply to English-medium universities outside the US with the full cost of attendance covered by scholarships. Similarly, Concourse Global is a platform

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purposefully built to help counselors (regardless of resource level) navigate a myriad of admissions systems: to create access—from universities to students and from students to universities, connecting opportunities to those searching for them.

As of August 12, the 20th and final Second Chance participant, a student from Uganda, was placed with a full scholarship at the Foundation for Liberal and Management Education (FLAME university) in Pune, India.

## New Directions in Higher Education

Concourse Global's outreach as a company is a model of what access and outreach could look like, and maybe what it should have always looked like. Turbulent times have been more calmly navigated with the support of this student-centered company, bringing all parties to the table (or to the Concourse, so to speak) to collaborate and ultimately put opportunities into the hands of students.

To date, Concourse Global has assisted in the placement in more than 100 students who were rejected from approximately 1,000 colleges total. The pilot projects collectively landed more than \$3.5 million in scholarships. The most recent round of Global Clearing brought an average of four offers of admission per participating student and more than \$6 million in scholarships offered. With many more Global Clearing events scheduled throughout the year, Concourse Global has steadily taken admissions possibilities to new heights. 

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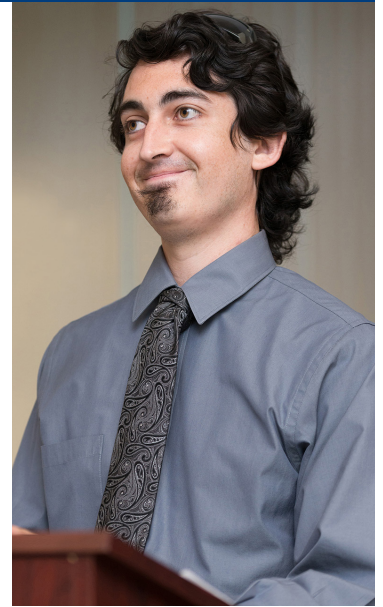
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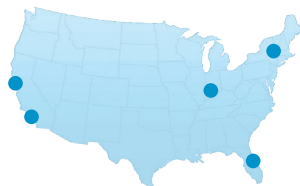
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# Better Brain Regulation through Mobile and Classroom Neurofeedback

By Dianne Kosto, SCN, Founder & CEO of SYMMETRY Neuro-Pathway Training

As we all know, anxiety has been skyrocketing, even prior to the worldwide pandemic. Statistics from the National Institute of Mental Health (NIMH) in 2001-4 documented the percentage of adolescence anxiety disorders and therefore, the comorbid behavior such as inattention, impulsivity, and depression, at 31.9 percent.

Recent studies from the US Census Bureau indicated that adults' anxiety levels have increased in the spring of 2020 **threefold!** Imagine how our young adults and youth are feeling.

In the qEEG brain map reports of our clients across the country, we have clearly seen anxiety-related patterns on the rise over the past few years. Many of these students were diagnosed with ADHD and learning difficulties. QEEG brain mapping is a way to measure brain wave activity, compare it to what a healthy brain produces, and identify areas of the brain that are not well regulated. Brain maps provide great insight into what is really going on with an individual, and can guide the therapeutic and neurofeedback process.

Neurofeedback is a form of biofeedback which measures EEG brain wave activity to help guide the user to better regulate their brain. In the past, it seemed that only a few "Neuro-Gurus" with specialized expertise could provide this service. That's not the case anymore. Now with shrinking technology, user-friendly apps, and online virtual training and coaching, anyone can have quality neurofeedback services wherever they may be. Whether your client is preparing for college or a therapeutic environment, or coming home from either, independent educational consultants can utilize this widely available and growing resource.

Neurofeedback is a technology-driven learning modality that involves applying sensors to the scalp to detect the minute electrical activity produced as our brain processes. That brain wave activity is then analyzed by the software. While your client is watching a movie on Netflix, YouTube, Hulu or any online streaming platform, the software overlays a filter. This causes the video to be brighter and slightly

*continued on page 24*



Dianne Kosto can be reached at [dianne@symmetryneuropt.com](mailto:dianne@symmetryneuropt.com)

louder when desirable brainwave patterns are met, and dimmer and softer when not. Thus the brain is being rewarded to regulate its own activity, and this is subconsciously learned and mastered with practice. The science shows that after 20 neurofeedback sessions, new and permanent change in the grey and white matter of the brain is measurable. [1]

In the 1960s, neurofeedback was discovered in a university lab. Now many studies show significant improvements in conditions including anxiety, learning disorders, and ADHD. [2]

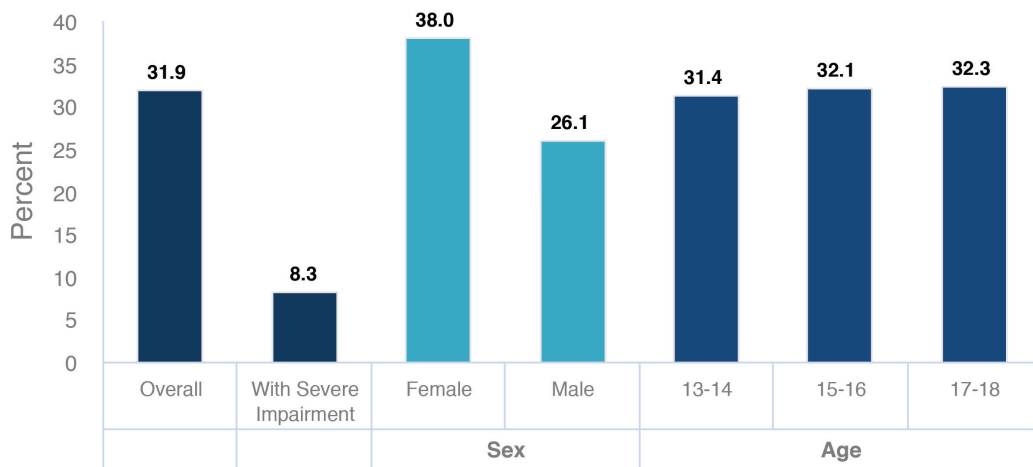
It is also used by peak performers, Olympic athletes, and business professionals. We all have a brain, and that brain can learn to better regulate itself. This allows negative symptoms to fall by the wayside and increases our chances of success and well-being.

As a mom on a mission, I found neurofeedback after many years of struggling to help my son,

whose impulsivity was off the charts. He was continually kicked out of various programs and schools. Finally, I discovered and became certified to provide neurofeedback, and I believe this saved his life 10 years ago. It really is gratifying to see so many programs, professionals, and families embracing this now.

## Lifetime Prevalence of Any Anxiety Disorder Among Adolescents (2001-2004)

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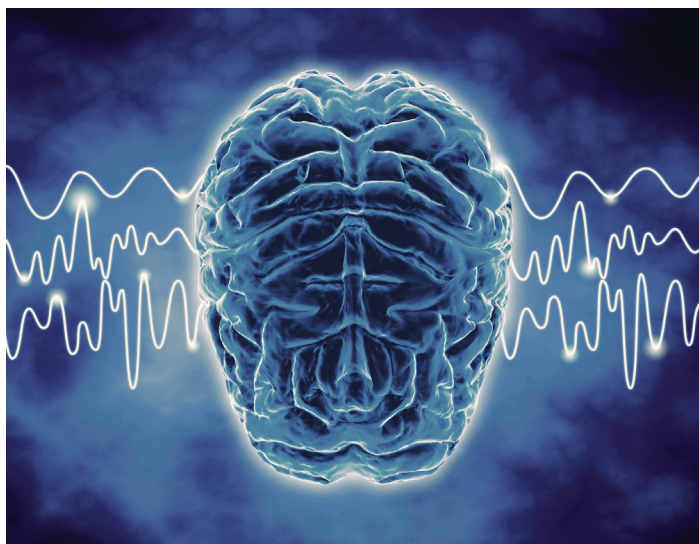
As IECs, you have been entrusted to find the right resources for your clients and families, yet many of them are growing leery of sending their children across the country. Finding local resources for them can be extremely challenging, if not close to impossible at this time. Neurofeedback is a resource to be aware of and well versed on. Programs, schools, and families are rapidly turning to neurofeedback to help with anxiety, focus, attention, and other related concerns. It appears to be on track to become a normal standard of care over the next few years.

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*As IECs, you have been entrusted to find the right resources for your clients and families, yet many of them are growing leery of sending their children across the country.*

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In the neurofeedback realm, there are many different techniques. Some neurofeedback is more invasive or aggressive than the qEEG-based approach and requires a closer clinical eye on the client during the sessions. Such approaches may not be appropriate for home or mobile training. I have used the style of neurofeedback over the last 10 decades (starting with my son) that lends itself nicely to remote users and does not require a clinician to be present. Sessions can be monitored from a distance very effectively. This approach is also easy to implement in a classroom setting for schools, colleges, and therapeutic programs. I look forward to watching as it becomes the “new norm.” 



[1] Gharzi et al. *Neurofeedback induces changes in white and gray matter*. Clin EEG Neurosci. 2013 Oct; 44 (4): 265-72

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# Regional Groups

## Austin

The Austin IECA Regional Group meets virtually on the second Wednesday of the month at 10:00 a.m. to discuss hot topics and provide support to one another through the application season. The group also meets with college admission representatives throughout the year. For more information about this group, contact Deb Davis Groves ([deb@davisgrovesedu.com](mailto:deb@davisgrovesedu.com)).

## Georgia

In July, Georgia IECA members wrapped up a 17-week marathon, meeting virtually every week, discussing the latest changes to our work environments, and hearing from experts and admissions representatives from across their home state. Experts included guest appearances by Mark Sklarow and Terry Knaus. Additionally, members had the honor of hearing and speaking at length with admissions representatives from the University of Georgia, Georgia Institute of Technology, Georgia State University, Emory University, Berry College, Mercer University, Morehouse College, Spelman College, Savannah College of Art and Design, Oglethorpe University, and Agnes Scott College. For more information about this group, contact Mark Cruver ([georgiaiecs@gmail.com](mailto:georgiaiecs@gmail.com)).



## New York

On September 14, Hendrix College held a virtual information session for IECs living in the New York metro area. For more information about this group, contact Alan Sheptin ([alan@sheptin.com](mailto:alan@sheptin.com)).

## Ohio/Michigan/Western Pennsylvania

The OH/MI/Western PA Regional Group convenes online monthly. Fall programs include meeting with representatives from the University of Kentucky, Savannah College of Art and Design, and Purdue University. For more information about this group, contact Jason Vallozzi ([jason@campustocareercrossroads.com](mailto:jason@campustocareercrossroads.com)).

## Philadelphia

The Philadelphia Regional Group kicked off its fall season with a September 15 meeting with Scott Grzenda, undergraduate admissions counselor at the University of Delaware. Along with an update on UD's admissions plans for the spring and the outlook for the class of 2021, Grzenda shared information about UD's new gap year programs. For more information about this group, contact Fran Manning-Smith ([fran@steplanners.com](mailto:fran@steplanners.com)).

## Raleigh-RTP

Throughout the summer, the Raleigh-RTP Regional Group met every two weeks to keep up with the changing landscape of college admissions, including a meeting led by Pam Shelor, IECA associate member, to discuss takeaways from the IECA Virtual Spring into Summer Conference. Study skills specialist and IECA professional member Paul Rivas gave an informative presentation on time management and study skills at the group's August meeting, with valuable tips for working with students as well as managing your own time as busy professionals. This fall, the group will meet every third Thursday. For more information, contact, Manjiri Sethna ([bewisec@gmail.com](mailto:bewisec@gmail.com)).

## San Diego

The San Diego Regional Group has been meeting virtually since February. Recent meetings have featured discussions with representatives of Scripps College, Johnson and Wales, Boise State University, De Paul, Cal Lutheran, Saint Mary's College, and the University of Colorado, Boulder and with study skills specialist and IECA professional member Paul Rivas.

For more information about this group, contact Jackie Woolley and Gina Gerrato ([IECASDRegionalGroupCoordinator@gmail.com](mailto:IECASDRegionalGroupCoordinator@gmail.com)).

## Seattle

Seattle-area IECs participated in a webinar with the Pacific Northwest representative from Cal Poly San Luis Obispo on August 25 to learn about changes due to COVID-19 and best admissions practices. On September 24, they met with study skill specialist and IECA professional member Paul Rivas. For more information about this group, contact Kiersten Murphy ([kiersten@schoolconsultant.com](mailto:kiersten@schoolconsultant.com)).

## Tennessee

Nashville-area IECs meet regularly via Zoom to support one another as they navigate college admissions during the COVID-19 pandemic. The group was delighted to recently welcome a new IECA student member, Michelle Rosen. For more information about this group, contact Kathy March ([ktm@kathrynsmarch.com](mailto:ktm@kathrynsmarch.com)).

## West LA

The West LA Regional Group continues to meet virtually twice monthly. For information about this group, contact Marilyn O'Toole ([marilyn@thecollegeconsortium.com](mailto:marilyn@thecollegeconsortium.com)).



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## In the News

**Laurie Weingarten** (NJ) was quoted in "College Food Safety 101: How Do You Safely Feed Students During the Pandemic?" in *Forbes* on August 14. She was also quoted in "GPA, SAT, and...COVID-19? College Admission in the Wake of a Pandemic" in *Health Righters*, a new magazine started by college students throughout the country, on July 18.

**Ibrahim Firat** (TX) was quoted in "Does College Tuition Insurance Cover COVID-19?" in the *Huffington Post* on September 4. He was also interviewed for the segment "College students face tough calls ahead of fall semester" on KTRK-ABC 13 on August 10.

**Theodra Washington** (MD) was interviewed for the segment "More parents are interested in private schools as most of DMV public schools go virtual" on WJLA ABC-7 on August 31.

## IECA's Career Center

Since announcing our Career Center in July, ads for independent educational consultant positions attracted 1,248 views with 26 applications filed. Visit [link.iecaonline.com/careers](https://link.iecaonline.com/careers) to post a position available or to explore our help wanted ads for newer IECs or those looking to affiliate, join a practice, or franchise.



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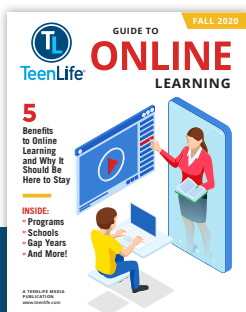
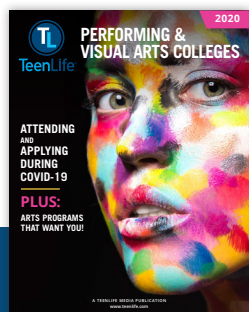
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## Announcing our 2020 Micro-Grant Recipients

The IECA Foundation supports the purpose of every independent educational consultant's work—to help children and young adults find the best possible choices for their education. For almost 25 years, the Foundation, the philanthropic arm of IECA, has been funding worthy programs that help children and young adults find great educational opportunities.

Each year, the Foundation seeks to highlight the work that IECA members and consultants do by awarding \$1,000 micro-grants to five organizations that align with our mission—organizations where consultants have had an ongoing relationship serving young people as they move forward in their education.

The following organizations are near and dear to the hearts of the IECA members who support them through volunteer work and will receive \$1,000 each from the Foundation.

### Caterpillar Ministries (North Carolina)

Caterpillar Ministries strives to support the well-being of families in the Huntington Green mobile home community of Huntersville, NC, most of whom live below the federal poverty line and face many of the challenges commonly associated with poverty. Programs include fun for preschoolers, small groups for teens, and ESL classes and job training for adults. [www.caterpillarministries.org](http://www.caterpillarministries.org)

### College Consultants Care

College Consultants Care provides FREE college application assistance from experienced independent educational consultants to students diagnosed with cancer or who have a parent diagnosed with cancer. <https://collegeconsultantscare.org/>

### Faulk Center for Counseling (Florida)

The mission of the Faulk Center for Counseling is to promote emotional well-being through a variety of free and low-cost programs for counseling, therapy, and support. The Faulk Center provides a warm, accepting, and confidential environment where people who are dealing with life's problems are helped to make changes or to cope more effectively with things that they cannot change. <https://faulkcenterforcounseling.org>

### iWRITE Literacy Organization (Texas)

iWRITE believes that creativity and imagination are natural gifts of childhood, which is why it encourages children to create daily and enter the annual short story contest, I Write Short Stories by Kids for Kids. Both reading and writing build a foundation



for children to become leaders among their peers. The I Write Short Stories by Kids for Kids annual publishing contest awards



children for their academic and artistic achievements. The act of being a published young author or illustrator increases positive self-esteem and encourages youth to become role models to others. <http://www.iwrite.org>

### Settlement Music School (Pennsylvania)

Settlement Music School was established by Mary Louise Curtis as a means by which students from poorer and underrepresented communities could receive free or reduced rate music lessons and have instruments to play. <https://settlementmusic.org>

For more information and to stay up-to-date on future events, visit [www.iecafoundation.org](http://www.iecafoundation.org)

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# Introductions

## Please Welcome IECA's New Professional Members



**Shannon Bergeron (TX)**

has been an IEC for five years and was an associate member. She has worked as a school counselor for the last 16 years and started her IEC business part-

time in 2016. Most recently, she was the lead counselor at the Liberal Arts & Science Academy High School in Austin, Texas. She transitioned out of schools in 2019 and now works full-time as an IEC.

Bergeron earned a BBA in marketing from the University of North Texas and an MEd in counselor education from the University of Maine. She is a member of NACAC.

As a lead counselor in Austin, Bergeron worked with district officials to change policies to protect privacy issues related to gender. She led a Bootcamp for New Counselors for more than 30 new counselors and leader of the Summer Melt program. Additionally, she was finalist for the Austin ISD "Counselor of the Year."

As a volunteer with the Matchlighters Scholarship program, Bergeron provides college counseling for high-achieving, low-income students. She also volunteers with Ally Parents, serving as a friendly and empathetic resource for transgender/non-binary youth (and parents).

Bergeron loves to travel and hike with her husband. In her spare time, she trains for and runs marathons.

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Specialty: C*



**Cheryl Chamberlain**

(IL) has been an IEC for four years and was an associate member. Before working in educational consulting, Chamberlain practiced as a business litigation

attorney for more than 20 years.

Chamberlain earned a BA in public relations from the University of Illinois, Urbana-Champaign and a JD Honors from the IIT Chicago-Kent College of Law. She also holds a Certificate in College Counseling with Distinction from UCLA Extension. Chamberlain attended the IECA 2016 Summer Training Institute and is a member of NACAC and IACAC.

A regular consultant with the College Consultant Consortium group, Chamberlain also writes a blog and gives presentations to families about the college admissions process. She has been active in civic and volunteer groups since she was a teenager in everything from education and environmental groups to acting as a volunteer educator or advocating for personal rights. Most recently, she has served as a mentor with College Bound Opportunities, a college list specialist with Matriculate, and a trustee for the Village of Riverwoods. Chamberlain welcomes the opportunity to work with LGBTQIA students.

Chamberlain loves traveling and reading. Together with her family she also enjoys a variety of outdoor sports, including golf, hiking, and kayaking.

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Specialty: C*



**Marsha Comegno (NJ)**

has been an IEC for 14 years. Previously, she worked with the associate vice provost of the University of Pennsylvania on distributed learning

and in law school admissions. Prior to that, she was associate dean of admissions at Salem College.

Comegno earned a PhD and an MS in higher education administration from the University of Pennsylvania and a BA in history and secondary education from Gettysburg College. She is a member of NACAC, NJACAC, PACAC, NYSACAC, SACAC, and Phi Beta Kappa.

Comegno holds several leadership positions, including as a member of the Gettysburg Board of Trustees; president of the Alumni Leadership Board at the University of Pennsylvania Graduate School of Education; member of the Gettysburg College Admissions Advisory Council; and past president of the Gettysburg College Alumni Board of Directors. Comegno volunteered previously as a Confraternity of Christian Doctrine (CCD) teacher and Pre-Cana instructor, and in various positions with the Moorestown Home and School Association.

Comegno enjoy daily yoga, reading (especially historical fiction), and traveling with her family.

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**Laurie Cortez** (CA) has been an IEC for 14 years and was an associate member. Her experience as a former teacher and vice principal, combined with her experience as

a certified independent college counselor, provides valuable insight into the higher education landscape.

Cortez holds a BS degree in business, an MA in organizational management, California teaching credentials, and a UCLA Extension College Counseling Certificate. She is a member of NACAC.

Cortez is a frequent media commentator and provides college preparation workshops for parents and students at high and junior high schools as well as educational and community centers. She also provides pro bono college preparation assistance.

Cortez's husband, Ron, is vice chancellor/CFO of UC Irvine, and together they are the proud parents of two grown children: Kristen is an attorney and graduate of Loyola Marymount University and Southwestern Law School, and Marcus is an associate director of curriculum for Achievement First, a K-12 school network, and a graduate of Georgetown University.

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Specialty: C*



**Kathleen (Kate) Duey** (CA) has been an IEC for 11 years. As the principal of Admission Planning, LLC, she provides ethical, high-quality, customized, solution-

oriented college application consulting and a commitment to creating the best college options for each and every student. Every year about half of her students are highly gifted.

Duey earned an AB from Harvard College and an MBA from the Harvard Graduate School of Business. She also holds a Certificate in College Counseling from UCLA Extension and took coursework in the history of women's colleges and community colleges from the Harvard Graduate School of Education. Duey is a member of NACAC and the Harvard Alumni Association.

Duey gives talks to organizations that support gifted students including the California Association for the Gifted, the Institute for Educational Advancement, and the North Hollywood High School Highly Gifted Magnet. She also works with the college counselors at St. Pius X-St. Matthias Academy, a high school serving primarily low-income Latino students in Downey, California. Additionally, she works with two pro bono students every year.

Duey enjoys Iyengar yoga, growing vegetables, and hiking up Cherry Canyon Park in La Canada, California.

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**Eric Endlich** (MA) has been an IEC for three years and was an associate member. He founded Top College Consultants to help students worldwide—especially those with

learning differences or other challenges—successfully transition to college and graduate school. He has worked as a clinical psychologist for over 30 years and has taught undergraduate and graduate psychology courses at Boston University, Tufts University, Suffolk University, and UMass/Boston.

Endlich graduated Phi Beta Kappa from UC Berkeley with a BA in English and went on to earn an MA in psychology from NYU and a PhD in clinical psychology from Boston University. He also holds an Independent Educational Consultant Certificate from UC Irvine-Extension. Endlich attended IECA's 2018 Summer Training Institute and is a member of NACAC, the American Psychological Association (APA), the College Autism Network/NASPA, and AHEAD.

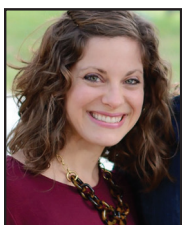
A member of IECA's LD/ND Committee and the Asperger/Autism Network (AANE) clinical advisory board, Endlich is a frequent conference presenter. He is also an advisory team member of the Friedman Neurodiverse Couples Institute and a writer and health advisory board member for Personal Best Publishing.

Endlich is coauthor of a forthcoming book on autistic adults and the contributor of a chapter in a recent book for attorneys with clients on the autism spectrum.

Married for 34 years, Endlich is father to two adult children, both of whom are neurodivergent.

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**Michelle Jacobs (MD)** has been an IEC for four years and was an associate member. She has a decade's worth of expertise on both sides of admissions and has been an independent

educational consultant with College Bound since 2016. Previously, Jacobs served as director of college counseling at a local private school, where she guided 200 students annually. She also worked at the George Washington University (GW), including as an assistant director in the Office of Admissions, reviewing thousands of applications and recruiting at high schools across the country. Prior to working in admissions, Jacobs taught high school English.

Jacobs earned her doctorate in higher education from GW, researching how students' college search, choice, and academic match is influenced by fit. She holds a master's in higher education from GW and a bachelor's from the University of Maryland, College Park. Jacobs has presented at national conferences on various topics related to students' college choice and experience.

Jacobs loves spending time with family and friends, exploring with her young kids and, in any spare moments, knitting and running.

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Specialty: C



**Huong Nguyen** (Vietnam) has been an IEC for six years and was an associate member. Because there is no counseling in the Vietnamese school system, Nguyen

worked with senior teachers from local high schools to cofound PAC Group (Professional Academic Counseling), a group of independent educational consultants designed to provide students with professional, transparent, comprehensive services. Nguyen serves as the organization's operations manager/IEC.

Previously, Nguyen worked as general director at the NTD Trading Company, key account supervisor at Viet Thai International Joint Stock Company, and as head of the customer service department at Cleverlearn Vietnam English Language Center.

Nguyen earned a BA in international business management studies at Zeeland University, the Netherlands and a Certificate of College Admission Counseling at the University of California-Riverside Extension. She also holds a Certificate of UK College Admission from UCAS and a Certificate in Japanese Universities Admission from the University of Tokyo. She is a member of International ACAC.

As co-founder of the Dream Wings Club, Nguyen directly planned, supervised, and coordinated with the support team to help disabled children at the rehabilitation centers of orphanages in the Son Tay and Ha Dong areas. She also organized events celebrating Christmas, Lunar Festival, and Children's Day for disabled children.

Nguyen has two children and together they love traveling, music, movies, cooking, and baking.

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**Margot O'Connor** (NJ) has been an IEC for three years and was an associate member. She brings her strong research and storytelling skills to her role as an IEC as well

as a keen understanding of adolescents. Before working as an IEC, she worked as an attorney specializing in commercial litigation. She also worked as a television producer for CBS News and Court TV, where she worked on live court proceedings such as the OJ Simpson and the Michael Jackson trials. O'Connor has also worked in sports production and marketing.

O'Connor earned a BA in history and art history from Georgetown University as well as a JD from Fordham University. She played women's field hockey for all four years of undergraduate school. O'Connor also holds an Independent Educational Consultant Certificate from UC Irvine-Extension.

O'Connor volunteers in a variety of capacities in her community. She is on the Library Board Association of her town's privately funded public library and is a past president of Campership of Monmouth Country, an organization that raises money to send underprivileged children to summer camp. O'Connor volunteers as a lacrosse and basketball coach and was a Recreation Commissioner for her town. Additionally, she volunteers at her church teaching religious education and assisting at mass.

O'Connor has been married for 21 years and has four children ranging in ages from 10 to 17 years old as well as a dog, Mabel. She is an avid tennis and paddle tennis player and enjoys skiing and spending time at the Jersey Shore during the summer.

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Specialty: C

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**Jennifer Piercey** (CA) has been an IEC for five years. Prior to starting her own consulting practice, she worked for a test prep-college consulting company. Before that,

she organized special events for a high-end wine retailer and served on the boards of several volunteer organizations.

Piercey earned a BA in history from UC Davis and a Diplôme SELFEE from the Sorbonne in Paris, France. She also holds a Certificate in College Counseling from UC San Diego Extension. Piercey is a member of WACAC, NARAL, the Sierra Club, and the ACLU.

Piercey volunteered with several school PTAs while her sons were in school and was on the board of directors for an aquatic club, running a few large swim meets each year. Most recently, her volunteering has focused on civic engagement.

Piercey and her husband are San Francisco Bay Area natives who have traveled to and lived in different corners of the world and want their sons to do the same in order to experience and understand other cultures and perspectives. Piercey's older son was in China with the Peace Corps and is heading to Johns Hopkins SAIS in Nanjing. Her younger son is starting his studies in marine science at Cal State Monterey Bay. Piercey loves traveling, hiking, cooking, and combing beaches for beach glass.

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**Barbara Rapaport** (NJ) has been an IEC for 16 years. Prior to founding Rapaport Consulting, LLC, she served as the founder and coach of Marshall Academy High School Mock Trial.

Rapaport earned a BA in American studies from Barnard College and a Certificate in College Counseling with Distinction from UCLA Extension. She is a member of NACAC.

Rapaport is co-founder of E-Cubed: Experience, Explore, Educate, a teen learning group for homeschoolers. She has served in various volunteer leadership positions, including as a NACAC Performing Arts SIG co-leader and on the advisory boards of the New Jersey Homeschool Association, Princeton Learning Cooperative, Lynn University, and Gettysburg College. She has also volunteered as a college coach/writing coach with PeerForward (formerly known as College Summit).

Rapaport has three wonderful children, all of whom work in the arts. In her spare time, she likes to swim, read, cook, and attend plays, concerts, recitals, and films, in person when possible and virtually when necessary.

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**Tino Schuler** (FL) has been an IEC for four years and was an associate member. Previously, he worked as senior director, marketing, for Medtronic and as

managing director for Medtronic Germany.

Schuler earned a BA in European history from Knox College and an MBA from the University of Texas at Austin. He attended IECA's 2016 Summer Training Institute.

Schuler serves on the Knox College Board of Trustees and is chair of the Admissions and Financial Aid Committee. He is also a board member of the Schuler Scholar Program. Schuler volunteers with local foster children at the Foster Closet.

Married for 23 years to his wife Silke, Schuler has three children: Emily (21), a senior at Middlebury College; Sophie (19), a sophomore at Tulane University; and William (17), a high school senior. He also has two dogs, Nick and Schatzi. Schuler's hobbies include travel, skiing, golf, and reading.

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**Claudia Schwarz** (CA) has been an IEC for three years. Previously, she had her own private therapy practice for 15 years. Schwarz is highly skilled in working with a wide range of

counseling issues as well as adapting to diverse populations. She is a credentialed parent coordinator and child custody evaluator who teaches continuing education courses nationwide.

Schwarz earned her BA in clinical psychology from Willamette University and her graduate degree in marriage and family therapy at Cal State Sacramento. She has undertaken additional training in cognitive behavioral and family systems specialties, as well as custody evaluations, child interviews, child reunification and parenting coordination. She is a member of AAMFT.

Schwarz has been a licensed marriage and family therapist since 2004 and continues to maintain that licensure. She has attended various conferences including IECA, the Adolescent and Young Adult Collective, and the Institute for Girls' Development.

Schwarz served on the Nevada MFT board as vice president and on the Collaborative Parenting and Divorce Task Force. Schwarz worked as a judge for the Greenspun Junior High School truancy diversion program. She has also volunteered for Give Kids A Smile, a free dentistry program for underprivileged kids, the Make a Wish Foundation, and for Iron Man USA Triathlons races.

Schwarz and her husband have two sons and she is very involved in their school district, having served as the PTO president for several years and as the current high school PTA secretary. Schwarz enjoys triathlons and marathons, and actively participates in races across the United States.

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Specialty: S, T*



**Whitney Shashoua** (NY) has been an IEC for five years and was an associate member. She has experience as a formal classroom teacher, curriculum developer, middle

school program director, and high school placement director.

Shashoua began her career in education as a part-time, public school teacher while overseeing an academic program focused on low-performing elementary school students. She then taught English at an underserved high school in Cape Town, South Africa and volunteered as an elementary school teacher at an orphanage in Khayelitsha. She joined Teach for America as a 4th grade classroom teacher and a 4th grade writing curriculum developer at Achievement First in Brownsville, Brooklyn. As the middle school program director and then high school placement director for Breakthrough New York, a college-access non-profit based in New York City, she was responsible for planning, leading, and overseeing high school placement for more than 65 students.

Shashoua graduated magna cum laude from the University of Pennsylvania and received her master's in teaching from Relay Graduate School of Education. She is a member of the Small Boarding Schools Association and Dreamers & Doers and volunteers as a mentor for Children of Promise, NYC.

Originally from Aspen, Colorado, Shashoua loves spending time with her four nephews, cooking, reading fiction, walking around New York City for hours, and dancing.

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Specialty: S*



**Carolyn Sorkin** (CT) has been an IEC for seven years. In addition to her consulting practice, Sorkin works as director of North American counseling and the team head for grad

and transfer applicants for Elite Scholars of China. Previously, she worked as director of international studies at Wesleyan University and associate director of the King Juan Carlos Center of NYU. Her experience also includes teaching at NYU and coordinating the international educational exchange at Pontificia Universidad Católica de Chile.

Sorkin earned a BA in history from Brown University, a dual MA in international development education and educational administration and policy analysis from Stanford University, and a PhD in international education from NYU. She is a member of NACAC and attended the organization's "Transitioning to Independent College Consulting" in 2019.

Sorkin serves on the board of trustees for JTeen Connect and the Emanuel Synagogue. She also volunteers as a reader for Children's Reading Partners.

Sorkin's twins will graduate high school in 2023. Fluent in Spanish and competent in French and Portuguese, Sorkin loves learning about other cultures. Her favorite aspect of her work is helping students discover themselves and articulate their ideas. In her spare time, she takes long walks with friends, reads, participates in social activism, and needlepoints.

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Specialty: C+I*

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**Stephanie Starr** (NC) has been an IEC for five years and was an associate member. In addition to her IEC practice, she works as assistant director of curriculum and instruction for ParentTeach. She has 31 years of experience as a middle school English teacher, department chair, and advisor and 10 years of experience as a middle school diversity chair.

Starr earned a BA in English from Davidson College and an MEd in English from the University of Richmond. She attended the IECA 2015 Summer Training Institute and is a member of NACAC.

With her sister, Starr created a positive parenting curriculum to prevent Adverse Childhood Experiences (ACEs). She also helped create a community service curriculum that led to thousands of hours of community engagement on the parts of hundreds of students.

An active volunteer, Starr has spent the last five years working with high-impact organizations that are attacking social and economic inequality. She currently works with Circle de Luz, which supports first-generation Latinas throughout their middle and high school years in order to prepare them for college. To satisfy her love of the arts, Starr also serves as chair of the Jewish Film Festival Selection Committee.

She is also a certified doula and has assisted in more than 100 births.

In her spare time, Starr practices mindfulness, meditates, plays tennis, works out, reads, and travels.

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**Jennifer Stephan** (MA) has been an IEC for five years. She has spent her entire career in higher education helping young adults achieve their academic and personal goals. As such, she is aware of what it means and takes to thrive in college, and the importance of identifying schools that will enable this. She has expertise on engineering institutions and transfer students.

Prior to founding Lantern College Counseling, LLC, Stephan worked as dean of academic advising and undergraduate studies at Tufts University, as a consultant at Magellan College Counseling, and as an assistant professor of computer science and then class dean at Wellesley College.

Stephan holds a BS in electrical engineering from Johns Hopkins University as well as an MS and PhD in electrical and computer engineering from Carnegie Mellon University. She is a member of NACAC.

Among other media outlets, Stephan has been quoted in "Determine Whether a STEM Major is the Right Choice," *US News & World Report*; "A Focus on Mental Health on Campus" in *Tufts Now*; and "New summer program in Pavia, Italy bridges humanities, sciences" in *The Tufts Daily*. She also presented "Policies and Practices that Decrease Stress and Anxiety" at the Center for Enhancement of Learning and Teaching Symposium at Tufts University in 2019.

In addition to her consulting work, Stephan helped her own three daughters with their (very different) college search processes.

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**Bettina Weil** (NY) has been an IEC for four years and was an associate member. Previously, she worked as the director of college programs in Yonkers Partners

in Education, a non-profit organization that serves low-income, college-bound students. Later, Weil worked for the State University of New York and for Westchester Community College. In both organizations, she was responsible for creating and implementing programs for college transition, persistence, and completion for at-risk students.

Since 2008, Weil has worked closely with the Westchester Latino population through local community organizations and government agencies to educate and counsel students and their families on college-related topics. She continues to support low-income and undocumented students in their pursuit of post-secondary education.

Weil holds a master's degree from the Columbia University School of Social Work with a concentration in advanced generalist practice and programing for youth and family. As an undergraduate, she studied communications at the Universidad del Salvador in Buenos Aires.

Weil was born and raised in Buenos Aires and moved to New York in 1994. She began her career in Argentina as a journalist covering current events throughout Latin America, worked in marketing, and was the assistant director of the Centro Cultural San Martin, a cultural center in the center of Buenos Aires.

Weil loves traveling but spends most of her time in Westchester, New York, where she is kept quite busy with her five sons and two dogs.

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# The Back Page

## Resources Recently Shared on the IECA Member Network

Thank you to the IECA members who have recently shared these resources with fellow members on the Member Network. Find more resources on the Member Network: <https://network.iecaonline.com> (Browse > Library Entries).



Data/Information Provided	Website
Financial Health of Colleges and Universities	<a href="https://www.moody.com">https://www.moody.com</a>
Institutions Currently Requiring Test Scores for Merit Aid	<a href="https://link.iecaonline.com/test-scores-required-merit-aid">https://link.iecaonline.com/test-scores-required-merit-aid</a>
Texas Public Colleges Test Optional in Fall 2021	<a href="https://link.iecaonline.com/TX-colleges-test-optional">https://link.iecaonline.com/TX-colleges-test-optional</a>
S&P Global Ratings Higher Ed Mid-Year Report	<a href="https://link.iecaonline.com/SPGlobal-higher-ed-mid-year-report">https://link.iecaonline.com/SPGlobal-higher-ed-mid-year-report</a>
Test Optional Colleges Due to COVID-19	<a href="https://link.iecaonline.com/test-optional-covid19">https://link.iecaonline.com/test-optional-covid19</a>
Boarding School Snapshot of Fall 2020 Plans	<a href="https://link.iecaonline.com/boarding-schools-fall2020">https://link.iecaonline.com/boarding-schools-fall2020</a>
Adrift in a Pandemic: 3,000+ Higher Ed Students on Remote Learning and Their Plans for Fall 2020 (Top Hat Survey)	<a href="https://link.iecaonline.com/higher-ed-students-plans-fall2020">https://link.iecaonline.com/higher-ed-students-plans-fall2020</a>
IECA Homeschool Specialists by State	<a href="https://link.iecaonline.com/homeschool-specialists-by-state">https://link.iecaonline.com/homeschool-specialists-by-state</a>





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IECA<sup>+</sup>  
TM

# Member-to-Member INSIGHTS

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

October/November 2020

## IECA Affinity Groups

An affinity group is run by IECA members with similar interests in a specific topic. Share knowledge, interests, and goals.

Visit <https://link.iecaonline.com/affinity> to learn how to join existing affinity groups and the steps required to form a new one. You can join their community discussions on the Member Network (<https://network.iecaonline.com/home>, then click on Communities > All Communities).

## Existing IECA Affinity Groups

Best Notes Users

Black IECs

Cialfo Users

Consultants with Young Children

Homeschooling IECs

IECs Advising College-Bound Student Athletes

IECs Who Give Back

LGBTQIA & Allies

Parents with Struggling Children

TestPreppers

Working with Chinese Students and Families

Working with Gifted/Talented and Twice Exceptional Students

## Prepare for the Worst, Hope for Better: Contingency Plans for Your Business

By Katelyn Gleason Klapper, CEP, IECA (MA) In March 2020, the LD/ND

It's not unusual for a crisis to bring contingency planning to the forefront of our minds. The strange thing is, many of us don't do anything concrete in that moment. Do you have a home disaster kit

in the event of an earthquake, fire, or storm? Do you have a plan for your business in the same scenario? In a time of considerable health risks and worries for all of us, an IEC also needs to think of more unpleasant possibilities beyond losing a physical space or access to files. What happens to our clients if something happens to us? It's a proposition that we don't want to consider, but should.

I began to take this possibility much more seriously when I needed to have back surgery in October. This not only meant that I could not

meet with students for a month during what is typically a very busy time in college advising, but I was also dealing with the effects of chronic pain for months leading up to the surgery.



## Don't Depend on Luck and Goodwill

I was lucky. I had a writing specialist who was also training to be an associate consultant. I also had a very understanding client group that year and almost all of my students buckled down to complete

*continued on page M4*



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# The Growing Office

## Making the Most of Virtual College Tours

IECA members specializing in college admissions advising generally spend 20 percent of their time on the road, meeting with admissions officers, touring campuses, and exploring campus environments.

When the COVID-19 pandemic halted these crucial visits in the spring, including the IECA Big 10 Tour scheduled for March 30, members **Marilyn O'Toole** (CA) and **Joanne LaSpina** (PA) quickly pivoted to arranging virtual College Conversations for IECA members. These 60-minute Zoom information sessions with college admissions deans, directors, and officers (with live Q&A) provide valuable opportunities for IECA members to continue to expand and deepen their knowledge of a broad range of colleges and universities despite the pandemic-required shutdowns. O'Toole and LaSpina offer these tips to make the most of the information sessions.

### Prepare Ahead of Time

The more you prepare, the greater benefit you will reap. Spend 15-20 minutes prior to a virtual session looking thoroughly through the college's website. Use this time to familiarize yourself with the colleges within the university and to get a visual sense of the college's campus and structure. Conduct a Google image search to see student-taken photos of the college campus. Also use this time to write out the topics that are important to you. These will provide structure to your questions and notes. Consider the categories:

- Academic Programs
- Admissions Criteria
- Location
- Student Life
- Scholarships
- Financial Aid
- Gap Year or Preferred Path
- Physical Disability/LD/ND Accommodations

### Ask Pertinent Questions During College Conversations

As you login to the virtual information session, keep your browser open to the college's website so you can "follow along" visually with the presenter.

Respect the college representative's limited time, and your own, by asking questions you cannot answer by looking at the

college's website or the Common Data Set. Use the categories you've already created to organize your areas of interest. Sample questions you may wish to ask include:

- What are the college's most popular majors?
- What are the college's outstanding academic programs?
- Do you have an honors program?
- What is the college's admissions criteria? Is it a one-door application process into the university or are students required to apply to individual colleges within the university?
- What is the college's proximity to public transportation? How close is the airport?
- What medical care is provided by area hospitals? This is particularly relevant at present given the COVID-19 pandemic.
- What activities do students participate in outside of class? What percentage of students participate in sports, community outreach, or Greek life?
- How is the institution supporting first-generation students?



### After the Tour, Organize Your Notes

Whether you are using the note taking app Evernote or writing longhand with paper and pencil, take some time after the virtual tour to organize your notes in your preferred system.

While virtual information sessions cannot fully replicate in-person tours, they can help keep you armed with the extensive, firsthand information you need to aid clients in their search for a best-fit college. Plus, you'll be able to learn about the admissions process at colleges and universities across the country without the cost of traveling and from the comfort of your own home!

To see recorded College Conversations from the spring and summer, visit [link.iecaonline.com/webinars](https://link.iecaonline.com/webinars). Information about upcoming College Conversations will be shared in the Member Network and in 5 Minute News.

*Special thanks to Joanne LaSpina (PA) and Marilyn O'Toole (CA) from IECA's College Committee for organizing and hosting the College Conversations webinars and for offering these tips.*



## Using Automation to Reduce the Mental Load as an IEC

By Colleen Ganjian, MST, IECA (VA)

### The Mental Load

We've all heard about the "mental load," the invisible work we do on a daily basis to keep things running. At home, it might be as simple as ensuring that your children are dressed appropriately as they head out the door each morning. It doesn't sound like too big of a deal at first—but then all the daily nuances add up and it can start to feel a little overwhelming.

As IECs, our work life involves balancing more of the mental load than those in other professions. We're constantly remembering and juggling the unseen in an industry that's evolving and changing by the day, answering the same questions and providing the same reminders over and over again. You could spend all day trying to manage this stuff without even holding one meeting! Fortunately, just like you can use strategies to minimize the mental load at home, you can do the same at work.

### Why Automation?

In a "caring profession," it is easy to bite off more than you can chew. You want to provide amazing service and leave your clients feeling that you bring incredible value to their lives, but you can't be everything for everyone.

One of the best ways to shine without running yourself ragged is to set up automated processes and systems. Instead of feeling rushed or burdened by repetitive tasks and discussions, the goal is to try to cut your active involvement out as much as possible.

While automation can save time and money for IECs in both small and large practices, individual consultants without a large support staff may see the most immediate difference in their day-to-day work lives after just a few small changes.

Learn about a few of our favorite types of automations below!



### Scheduling Systems

Teenagers are not the easiest group of people with whom a professional could schedule appointments. From students with tons of extracurricular obligations to those who will drop an appointment at the first sign of a social engagement, they move meetings around quite a bit.

Introducing an online scheduling system, such as Acuity Scheduling or Calendly, can shave off an incredible amount of time. Not only will you be able to completely bypass the inevitable back-and-forth email chains about dates, but you'll also be able to avoid the ones from indecisive students reaching out to ask if something "better" has come up. And families love scheduling systems, too! It's so much easier for them to be able to schedule an appointment or make a change in real time.

Two additional benefits of scheduling systems: they completely erase the possibility of human error (no more double-booking!) and they also de-personalize bad news about cancellation policies. If students miss their window to reschedule or cancel, that's on them—and you don't have to be the bearer of bad news.



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their work before my October 20 surgery date. My associate took over the essay and application process for those who were left and ran interference for anything else that came up. However, I did lose opportunities for follow up with inquiring clients and my junior class never reached capacity that following year.

This ultimately was only a short interruption in my practice, but it gave me pause. I had considered myself “young” and had really never allowed myself to consider the impact of a catastrophic event to my business. I had a personal estate plan, but I hadn’t applied the same planning and discipline to my business.

## Creating a Blueprint

Begin with a risk assessment and operational checklist. Write out the specifics of your plan and then schedule a date on your calendar every six months to maintain your checklist items and plan. Items can include: contact numbers and emails as well as an email-tree for your employees and/or clients (try to draft your communications and messaging); billing, banking, and accounting/tax information; and client files, records, and technology. Spell out your fees and refund policy in this document as well as any staff responsibilities if you have a team practice. Consider short-term interruptions that constitute emergency plans (like my own) versus an unplanned absence or closure of your business. You might also want to consult your attorney about your plans to make sure you have covered all the necessary details.

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*Be sure to share your plan. Let critical team members or appointed partners know about your plan and how to access it. To your list of contacts, add the IECA office. We are members of a community of members who will reach out and help those left behind.*

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Be sure to share your plan. Let critical team members or appointed partners know about your plan and how to access it. To your list of contacts, add the IECA office. We are members of a community of members who will reach out and help those left behind.

Build concrete steps in your client onboarding that include an update to any of these lists. In addition to my client management software (which has the benefit of cloud storage and easy access for all of my employees), I now keep a simple spreadsheet of my active clients with a quick reference to the pieces of my process that they have completed (and paid for). If they have received their first research list, that qualifies for 40 percent of my fee. I then have milestone completions at 70 and 100 percent. I ask for my fee in advance of services, so my spreadsheet provides a record to use for providing refunds if necessary, which for me would be the worst-case scenario. My life partner and my employees understand this system and I review it with them annually.

## Planning Builds Confidence and Peace of Mind

Filling your shoes won’t be easy, but your planning can help. Before I had a team, I entered into a formal mutually benefiting arrangement with several of my colleagues to cover a portion of each other’s client load should we be unable. The choice of course would fall to the client and in my case, a refund would be offered as the alternative. I have never stated my contingency plans in my contract, nor do I mention it to inquiring families unless I am asked (I’ve only been asked twice), but I like having a plan at the ready should the topic come up. I have always felt good about having alternate resources lined up for my students.

If you are not working in a group practice, evaluate how you can leave plans or instructions for whomever will be there to manage your affairs. As you meet IECA members who share your philosophy and perhaps have a process that is similar to yours, you may consider building your own contingency network. Hopefully this network will also be one that provides ongoing collaboration or professional feedback so that if the time comes for anyone to deal with a tragic event, there is a genuine understanding and cooperative foundation already laid.

Like any task that you have been avoiding, taking an initial step can be tremendously empowering. Your plan does not need to be perfect at the beginning, but starting it will help you feel more in control of the uncontrollable. A trick that helps me to tackle my least-favorite tasks is accountability. I say it out loud and I set appointments with others to make sure I get it done. Add contingency planning to your next team meeting agenda. Make an appointment with your attorney to review your blueprint. Hold yourself accountable and don’t put this off. Planning, after all, is what an IEC is supposed to be good at. 



## Send in Your Member Shout Outs

To inspire and encourage camaraderie, the Community Committee welcomes you to send a Shout Out recognizing and thanking a member who has encouraged, supported, or lent you a helping hand. Please send a short note about those typically quiet and unnoticed acts of generosity to Lisa Gelman ([lisa@apptutoring.com](mailto:lisa@apptutoring.com)). The committee will share them in future issues of *Insights*.



# But I Just HATE Marketing!

By Bar Clarke, IECA (ME)

For many IECs, the concept of marketing seems a foreign and scary concept. When marketing is mentioned, we conjure up images of massive campaigns and multilayered strategies for large corporations. The reality, however, is that we are all businesspeople and as such, we must learn to market—both ourselves and our businesses. Although we are in business of helping people, and most of us started in this field because of a calling, it is crucial as small business owners that we accept marketing as a necessary aspect of what we do.

In today's customer-centric world, people expect businesses to market to them; they are looking for the inside track and want to get to know not only the businesses, but the people behind it. Think about when you shop these days, whether it be for pants, a hotel room, or a car. Your patterns have changed, what you are looking for has changed, and, most importantly, how you look for it has changed. Families seeking the services of an IEC are no different. The old "Field of Dreams" model—if you build it, they will come—isn't effective in today's fast-paced and interactive society. IECs can't afford to be passive and reactive. Yet, even with all the use of technology and new media, people still crave individual attention in their relationships.

At the recent IECA Virtual Spring into Summer Conference, 35 therapeutic IECs grappled with these business issues during a roundtable discussion. The Zoom session was lively, and many great ideas were shared. I think we all walked away with new nuggets of knowledge. If I were to distill the talk into one phrase it would be: **be genuine**.

The following were my takeaways.

## Know Your Audience

Are you having a Zoom coffee with program representatives or are you having a first-time visit to a group of local therapists? These are two very different conversations, but they are both effective uses of your time and each can be an effective marketing tool. We are in the business of building relationships, and we should look at every meeting as an opportunity to educate people as to what we do and how we can work together.

## Make Time for It

To be effective in our marketing, we must have a plan and then we must dedicate time to implementing it. We don't need to develop a 35-page detailed plan laying out every marketing move for the next year, but we do need direction and focus. Some IECs dedicate a set amount of time each day or week to focus on their marketing, while others bring in someone to help them develop their plan. Whatever your approach, remember that a plan does you no good if you don't stick to it. Don't develop or agree to something that is unrealistic or disingenuous.



## Play to Your Strengths

In many ways, this is the most important part of any effective marketing strategy for an IEC: be authentic and be yourself. If you are not someone who likes technology, then don't subject yourself to making Instagram videos. Conversely, if writing isn't your forte, endeavoring to write a blog or an article for your local paper may not be the best use of your time. Maybe you are a great conversationalist; in that case, inviting a team of local therapists to meet for an informal "get to know you" coffee is a great use of your time.

Find what works for you and use it. It will be more natural than if you force yourself to do something you "should" do.

## Use Social Media

Obviously, this is something we have to deal with today, and it is (relatively) new to all of us. The question we need to ask ourselves is, "What's the story we are trying to tell, and who are we trying

*continued on page M6*



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## Email Templates

How many times do your students ask you the same questions over and over again? Or maybe you have a message that you need to tailor ever-so-slightly for each group. You've probably already realized that you don't need to type it all out each time, but you also don't need to go digging through your email to copy and paste, either.

Most email systems offer the option for users to input text for reusable templates. You can create these templates for all kinds of various scenarios and answers, and input all of the text directly into your email responses on an as-needed basis. Someone wants to know whether she should write the optional COVID-19 essay? No problem. Click for the template and your detailed explanation about the pros and cons will automatically insert right into your email draft.

You can also set up fully automated templates as auto-responses, which can be used to respond to emails on your behalf with no involvement on your end whatsoever. For example, if someone asks you a specific question using certain wording, such as "How can I reschedule my appointment?" you can trigger your template to respond with the exact information they need.

## Submission Processes

Are you flooding nonstop requests from students during the fall? From essay edits to application review, these come in nonstop and the mental load of tracking each pending request can seem overwhelming, even with a task management system or an


assistant. Digging up all the files (and making sure you're reviewing the right versions!) can waste so much time.

Instead, consider setting up a form for your clients to complete every time they need anything reviewed. The students simply type in the necessary information and provide a link to the corresponding Google Document, if one exists. You can build it right in your task management system, or set it up somewhere else and use Zapier to connect the two. Every time a student submits the form, the task will wind up right there in your task list with everything you need at your fingertips.

And if you have a larger team? Make sure to include a drop-down box that corresponds to the right type of content (i.e. essays, application review, and so forth). You can then ensure that the submissions are automatically routed to the correct staff member with no additional thought or work on the backend. When the students forget to submit the form—because they will—just shoot back the link with an email template!

## Putting Time Where it Counts

Not only can a heavy mental load leave you feeling unproductive and burned out, it can also really impact your bottom line by reducing the amount of time you can devote to revenue-generating tasks.

But don't worry: the customer experience doesn't have to suffer as a result of automation. To the contrary, it will actually *improve* the customer experience, because you'll be less frazzled and can be intentional with your time. You'll never have to worry about dropping the ball on important work when the smaller details are squared away without your involvement! 

to tell it to?" Are you trying to gain exposure or traction in a new market? Placing Google or Facebook ads may then be a good way to introduce your services to a larger audience. Are you trying to grow your audience? Liking and commenting on articles on LinkedIn may be a good way to go. There are IECs who like to post pictures of programs they visit or to make YouTube videos telling the world their thoughts about issues facing our clients like addiction, depression, or social isolation. Whatever direction you take, utilizing social media can be an inexpensive way to spread your message.


## Do Your Homework

There are so many books, vlogs, and courses out there that an IEC could easily spend their full work week learning about marketing without ever actually doing it. This is yet another example of knowing what your end game is and then finding the program or situation which works for you. Are you a social media aficionado? Look into the Gary Vaynerchuk vlogs and posts. What if you are an old school reader? Many IECs have used the books *Marketing to the Affluent*, *7 Levels of Communication: Going from Relationship to Referrals*, and *Guerilla Marketing* to help launch and maintain their marketing plans. Like charts

and research? Maybe doing a SWOT (**S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats) or PEST (**P**olitical, **E**conomic, **S**ocial, and **T**echnological forces) analysis is best for you. Maybe you are a dabbler, and you can see merit in a combination of these approaches. Again, it's your plan.

## Say Please and Thank You

Expressing your gratitude for someone's time and effort is a wonderful way to not only be gracious, but also to leave your mark. Some IECs like to send a quick thank you note or a gift card to interventionists, therapists, or counselors who send them referrals. A well-timed gift card or small arrangement of flowers to express your thanks and gratitude to members of a client's team after a tough case requiring collaboration and teamwork will certainly be remembered the next time they are looking for someone to work with.

After an hour of discussion, a few things became abundantly clear to all of us in attendance at the conference roundtable: Marketing plays a crucial role in all of our small businesses, we all market (whether we call it that or not) already, and there is no one way or right way to navigate these tricky waters. 



## A Primer on Financial Aid Applications

By Donna Sakabu, IECA (CA)

The beginning of October marks the start of the financial aid application process for the 2021-22 academic year. For some students, Free Application for Federal Student Aid (FAFSA) is the only financial aid form they will submit if they are seeking need-based aid. Other students will be expected to submit the College Scholarship Service (CSS) Profile, in addition to the FAFSA, for financial aid consideration by individual institutions of higher education. Both applications are available in October each year. It is prudent for independent educational consultants (IECs) to become familiar, or to get reacquainted, with the terminology and the steps students need to complete to successfully file one or both of these important applications.

There are two methodologies used in calculating financial aid, depending on the application. The Federal Methodology (FM) determines a student's eligibility for all federal and state aid, including Direct Subsidized and Unsubsidized Loans. Eligibility is determined from the data provided on the FAFSA. Institutional Methodology (IM) is used by certain higher education institutions to ascertain a family's eligibility for funding from the college or university. The institutional Expected Family Contribution (EFC) is determined by the data provided on the CSS Profile application.

FAFSA is the application that is required to apply for federal and state student grants, loans, and work study. There is no cost to apply. Any student who is a US citizen or eligible noncitizen will qualify for some federal student aid, even if only for an unsubsidized federal student loan. The Federal Student Aid website (<https://studentaid.gov/>) has useful resources for learning about the many aspects of federal financial aid. I have accessed several resources on this website, both personally as a parent with two sons who have since graduated from college, and professionally, seeking information to guide my families.

Keep in mind that the FAFSA is the student's application. While parents may assist in completing the form, the questions on it are to be answered from the student's perspective. Truth be told it is usually the parents who are completing their students'



FAFSAs with the students' information. The first step in the FAFSA process is for the student to create a Federal Student Aid Identification, or FSA ID. The FSA ID will serve as the student's electronic signature on the FAFSA. Once a student creates an FSA ID, the parent will need to create one in order to cosign the FAFSA and to access the document online. To create FSA IDs, go to: <https://fsaid.ed.gov/npas/index.htm>

In the case of divorced or separated parents, the custodial parent's household income and assets are reported. Please understand that the household income includes the custodial parent and the spouse of the custodial parent if remarried. Even if there is a prenuptial agreement in place indicating that the stepparent will not contribute to college costs, for the FAFSA, the stepparent's income must be included. On the FAFSA, the custodial parent is the one with whom the student spends at least 50 percent of the year. Which parent claims the student as a deduction on the 1040 tax return has no bearing on which parent (in a divorce) must file the FAFSA.

The next step is to start the actual FAFSA application at <https://studentaid.gov/h/apply-for-aid/fafsa>. What is needed to fill out the application is listed here: <https://studentaid.gov/help/info-needed>. A student can list up to 10 colleges on the first submission of the FAFSA. The order of listing the colleges is not important. To be considered for state aid, there are some states that require their resident applicants to list the state schools in a specific order. Here are the requirements for each state: <https://studentaid.gov/apply-for-aid/fafsa/filling-out/school-list>



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*continued on page M8*

### *Financial Aid, from page M7*

If the applicant wants to add more colleges beyond the first 10, it is possible to do so. Once the student receives the confirmation email that the FAFSA has been processed, usually within a few days of submitting, the FAFSA account can be logged back into and the student will opt to “Make FAFSA Corrections,” remove some of the listed colleges and add the new school codes, then resubmit. With this change, any college that has been removed from the list will not automatically have access to any new information the family provides after removing that college, in the case of amending the FAFSA information. The college will still have the data submitted when that college was on the initial FAFSA submission.

Shortly after submitting the FAFSA application, the student will receive an email with a link to the Student Aid Report (SAR). Close scrutiny of this report will reveal a number, several digits in length, often beginning with zeroes but no dollar sign. That figure is the Expected Family Contribution (EFC) and is the one that each college the student has applied to will use in determining the student’s financial aid award.

The College Board’s CSS Profile is an additional financial aid application required by about 150 undergraduate colleges (their website indicates 400 but that number also includes graduate schools and scholarship programs). The student completes the CSS Profile in order to be considered for institutional need-based aid and sometimes merit aid. Colleges can customize the calculations to fit institutional priorities. This application is definitely more complex and time consuming to complete than the FAFSA. To see which colleges require the Profile, check this site: <https://profile.collegeboard.org/profile/ppi/participatingInstitutions.aspx>

The fee for submitting the CSS Profile to one college is \$25; additional reports can be submitted to colleges that require this application, for \$16 each. To begin the process of completing the CSS Profile, a family should visit <https://cssprofile.collegeboard.org/>. The “Before You Apply” section of the website has helpful resources for working on this application.

Both financial aid applications require income information reported on the parents’ federal income tax returns two years prior to when their child/ren will enroll in college. For the 2021-22 academic year (when current high school seniors will be freshmen in college), 2019 will be the base year for income. Also needed on both forms are the parents’ assets—checking and savings accounts, investments, trust funds, 529 college savings plans, real estate other than a primary residence, and the value of any businesses owned. The assets are reported as of the date the forms are being completed, not from the reported income year. FAFSA and the CSS Profile will want to know the family size, the number of dependent children, the state of residence, and the age of the older parent. All of this information will factor into determining what a family will be expected to pay for the child’s education.

While certain financial information is required for both the FAFSA and CSS Profile applications, there are differences between the two. The Profile requires much more detailed financial documentation.

The CSS Profile considers home equity in the primary home of the parents while FAFSA does not. The Profile will also ask for the value

of a family-owned business (less than 100 employees). For divorced or separated parents, the Profile will want to know the biological parents’ and the stepparents’ names. Most colleges will want the noncustodial parent to complete a separate Profile application, adding together both the custodial and noncustodial household financial information to calculate institutional financial need.

The FM EFC is documented in the Student Aid Report generated after submission of the FAFSA but there is not a clear indicator of the IM EFC that is created by the financial data submitted through the CSS Profile. The EFC amounts often will vary, FAFSA versus CSS Profile.

Note: there are some colleges that expect students to submit the FAFSA, and possibly the CSS Profile, to be considered for merit (non-need based) scholarships. It is important to be aware if filing one or both of these applications is a requirement for merit aid consideration.


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***It is also important to convey to families  
that the financial aid applications must be  
submitted each year.***

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It is also important to convey to families that the financial aid applications must be submitted each year. This has surprised some of the families I’ve worked with who thought this could be a once and done process, similar to applying for admission to college. Also, it is essential for them to be aware of financial aid application deadlines, which vary widely by college and with different types of admissions deadlines (e.g. Early Action vs. Regular Decision). Both applications are available in October. Families need to give themselves ample time to gather the appropriate documents and to complete the forms. Best to have them check the college financial aid websites to confirm deadlines for applying and to ascertain which specific documents are required. As we all know, these deadlines creep up quickly.

Families who have experienced negative changes in their finances this year, for one or more reasons, including due to COVID-19, may want to appeal their students’ financial aid offers. They can access a free tool called *SwiftStudent* (<https://formswift.com/swift-student>) that will guide them through the process of requesting additional financial aid. *SwiftStudent* was developed by Abigail Seldin’s family foundation, with input from colleges, higher education advocacy groups, and the National Association of Student Aid Administrators (NASFAA). Seldin was motivated to create a “one-stop shop” resource on the financial aid appeal process as this information was lacking on the Federal Student Aid website. Sometimes families are not even aware that they can appeal their child’s award.

*SwiftStudent* is designed to help families answer several questions pertaining to eligibility for additional financial aid, determining what documents are needed, how best to write an appeal letter, and where the letter needs to be submitted. The timeliness of the launch of the *SwiftStudent* website coincided with the distribution of several billion dollars in Cares Act funding to provide aid to colleges for students impacted by COVID-19. Students’ data will not be sold or shared with third parties. 



## Is it Still 2020?

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

Mark Sklarow and the IECA staff did an amazing pivot with the Spring into Summer Conference and created a virtual experience that engaged, informed, and inspired us. For a hot minute, I did miss sitting down in a corner chatting about work, family, and life with colleagues I see only at conferences or on tours (tours, remember those?!). Or, taking in a little bit of the culture of the city before the next session (Antoinette, that Garrett's popcorn we just had to have when IECA was in Chicago, and Kim, those great tickets to a play your sister offered to us!).

Continuing with the new, let's welcome Sydney Montgomery to the Ethics Committee. A relatively new member, Montgomery creates opportunities for members to be reflective about their ethical practices as detailed in her article, *Combating Systemic Racism as an IEC* (<https://link.iecaonline.com/combating-racism>). A graduate of Princeton University and Harvard Law School, Montgomery's voice is important to the future of our profession in her work with students bound for higher education and for IECs seeking a professional organization.

Rebecca Grappo returns for her second year on the committee and her ability to cut to the chase is an asset to us. We value her perspective on many issues.

Living in two pandemics challenges us all to move forward in ways that honor our values and protects our sanity at home, work, and play. In August, we saw the ongoing fallout from *Operation Varsity Blues* back in the news as Aunt Becky (Lori Loughlin) and her husband, Massimo Giannulli, received short sentences for their roles in this scandal (well, scandal to some of us). With the spotlight still flickering on and off the actions of one dishonest college consultant, it reminds us again of our responsibility to uphold our *Principles of Good Practice* (PGP). The current committee will be reviewing the PGP to ensure it continues to serve our members. In the meantime, please review the *Principles of Good*


*Practice* and the procedure for ethics concerns, along with the *Standards of Excellence* ([http://bit.ly/IECA\\_documents](http://bit.ly/IECA_documents)). The *Terms and Conditions* (<https://network.iecaonline.com/termsandconditions>) for the IECA Member Network can be accessed after you log onto the network. Look in the upper right-hand corner of the page for the link to this informative document that assists you with navigating the network in a kind and professional way.



Review the *Principles of Good Practice* and the other documents. Let me or one of the other committee members know your thoughts (gently!).

Here are the top four ethics concerns presented to the Ethics Committee in 2020, not in any order:

- Professional designation
- Referrals
- Cultural competency
- Member Network etiquette

Please review the IECA logo policy also found at [http://bit.ly/IECA\\_documents](http://bit.ly/IECA_documents) and if you have questions about any of the documents and policies, let us know. If there is an ethics topic of interest to you that you would like us to discuss in article, we're here to listen or better yet, you can be a guest columnist. By the way, remember to practice self-care. As Brené Brown says, "Talk to yourself like you would to someone you love." 



Belinda Wilkerson can be reached at [doctorb@steps2thefuture.com](mailto:doctorb@steps2thefuture.com)

# A Recap of the August 27 Virtual Town Hall

On August 27, IECA hosted its first all-member Virtual Town Hall with more than 180 members attending live. New officers shared plans for the year ahead, updates on operations and finances, reflections on past successes, and goals for the year ahead.

Several members were given service awards for their contributions to the IEC profession. **Joanne LaSpina** and **Marilyn O'Toole** received awards for their work organizing College Conversations, virtual college tours for members while in-person tours are suspended. Awardee **Gail Curran** was recognized for her working creating a weekly support group for IECs specializing in therapeutic consulting. **Jennie Kent** and **Jeff Levy** received service awards acknowledging their efforts to organize and host Associate and New Member Roundtables twice monthly.

Following the award presentation, officers shared updates and visions for the coming year:

- Secretary/Treasurer **Ibrahim Firat** discussed IECA's fiscal situation, which remains healthy due to significant reductions in expenses and the continued support from members and sponsors.
- VP for Ethics & Professional Practices **Belinda Wilkerson** directed members to [bit.ly/IECA\\_documents](http://bit.ly/IECA_documents) for access to all ethics documents and a form for reporting any concerns.
- VP for Membership & Engagement **Maite Halley** discussed her goals to increase participation from members, foster a sense of community, and identify leaders.
- VP for Education & Training **Joan Wittan** shared her intention to listen to other members and put together education intensives based on their input creatively, including a spring Education Intensive on racial sensitivity and cultural competency.
- VP for Committees **Betsy Morgan** recognized committees as the lifeblood of the organization and acknowledged the members who served on them, particularly those assumed leadership roles when faced with the pandemic.

After their updates, **Judy Bass** was presented with the Antonoff Award, the highest honor one can receive as an IECA member. The award is presented annually to a member who exemplifies the values of IECA through their outstanding contributions to the profession and their commitment to students.

The Town Hall continued with CEO **Mark Sklarow's** update on the state of the profession and IECA as an association. Sklarow reflected on the increased sense of volunteerism among members, the association's strong financial situation, and the continuity of resources and services despite the many challenges of the past year.

The meeting concluded with updates from new committee chairs. To view the recorded Town Hall meeting, visit <https://link.iecaonline.com/committee-reports>

## About Antonoff Awardee Judy Bass



**Judith (Judy) S. Bass** (MD) began her career as an educational consultant in 1999 after a successful teaching career. She has presented professional workshops and parent seminars throughout the US and overseas on topics such as college readiness and alternative

postsecondary paths, earning her international recognition as an expert in the field of educational consulting for students who learn differently.

As chair of the College Committee, Bass co-created the first IECA College LD tour, which became the framework for future tours. She served as a board member of IECA and is past chair of AICEP. Bass has enjoyed training and mentoring many new IECs over the years. She was an instructor in UC-Irvine's Certificate program, taught the workshop on LD at the IECA Summer Training Institute (STI), and is a contributing author of the book *Navigating the Transition from High School to College for Students with Disabilities*. Her articles have appeared in numerous magazines, including IECA's *Insights* and Children and CHADD's *Attention*. Bass's research data on 400-plus colleges is published on [CollegeWebLD.com](http://CollegeWebLD.com). Judy earned a BA in Spanish and education from Stony Brook University and a Certificate in College Counseling from UCLA. She holds the credential of Certified Educational Planner (CEP).

## IECA's Mentor Match

This program is a signature benefit of IECA membership!

We invite experienced professional and associate members to serve as mentors to IECA members seeking one-on-one guidance. If you would like to be matched with a mentor, sign up on the Member Network (link on red navigation bar): <https://network.iecaonline.com>







# What's Your Solution?

## How to Handle Fees for Friends and Family

By Ricki Benjamin, MA, IECA Associate (MA)

I recently posted an inquiry on the Member Network asking how fellow IECs handle fees for friends and family. Responses ranged from 10-20 percent discounts (a few said 50 percent) to a set amount off the package price to “Do NOT work with friends!” In the end, I decided not to work with my friend “formally” as I did not feel comfortable having them sign and contract and pay me. However, I said I would be happy to informally guide them and have them call me anytime for advice. They were thrilled with this solution. I offered a referral if they did want an IEC to advise them formally. One point of clarification: I would never charge for family.

Below are a sample of the responses I received. Thanks to everyone who gave me advice and input!

- I offer a 10 percent discount for friends/family, and siblings (second child of a client). If a friend/family brings a second child, I still do 10 percent.
- It depends on what your price point is. This year, I created brand-new packages. By increasing the price of my comprehensive package but re-marketing it as a senior rush package, I was able to charge €1,000 more. However, for close family and friends, I try to do the original pricing of €5,400.
- I offer returning families/siblings 10 percent off. Don't discount too much. It is really about the best pricing strategy. If you can bring your fee to a middle-ground price with a discount for family and friends, then go that route. Another option is to employ a variety of payment plans to help friends and family spread payments out. This is something I do for friends and family that I normally do not offer clients.
- Personally, I don't work with friends. I send them to my website and YouTube for info and happily refer them to other counselors. I support, recommend, and refer.
- I have heard some IECs say they provide a 25 percent discount; others, no discount; and what I thought was the best advice of all, refer your friend to someone else. If they are a sibling or as close as a sibling, do it for free and give your all. Tell them the positive word-of-mouth they will generate about your work will be priceless.
- My policy is to refer close friends and family to other consultants. But, when it comes to people I know through my kids, who I play tennis with, etc., I charge them the full amount. I've been doing this for years and it's worked out fine.
- I offer friends and family a 10 percent discount on packages or five percent off hourly.
- I show on my invoice what my normal fee is and then give them the discount I feel comfortable with. That way, they know and appreciate the true cost of the service. They also know the cost if they want to refer someone.
- If it is a very close friend, I will give a deep discount—probably about 50 percent. For a casual friend, I will usually do what I do for siblings, a five percent discount. I am happy to help any family member and wouldn't consider charging them at all.
- So many of my clients are children of friends that a discount would not be practical.
- We have four kids so I do a lot of friends and family work. I charge them the same amount as my basic comprehensive package but include up to 12 supplements.
- You want to think very carefully about working with friends and family. For the most part, I made a policy that I would do so. When I violated my own rule, I came to regret it in a couple of cases.
- I would give a small friends and family discount, but don't undermine your value (or your revenue stream) by discounting too much. The work won't be any less for these folks—and sometimes it turns out to be more.
- Family I do for free, but they have a lot more “heavy lifting” to do than my other clients. For friends, I offer a free Overview Session, which is usually \$300. Full fare after that.

*continued on page M12*



*Ricki Benjamin,  
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com*

### *What's Your Solution, from page M11*

- I usually offer a 30 percent discount for friends and family. I also have them host a small gathering at their house for a meet-and-greet in case other families want to ask questions about my practices.
- My advice: don't offer a discount for friends and family. When you do this, they don't take your services, or you, as seriously as they should.
- I did not accept payment from my two closest friends. One paid me with theatre tickets and the other with a weekend away at a lovely inn. For my close friends I offer 20 percent off all services, and 10 percent off for my tennis group.
- For close friends I charge 2/3 of my regular hourly rate. I do not charge family members.
- I offer a 10 percent discount for friends and family. They always appreciate it!


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*One of my best business strategies was the decision to not take friends on as clients. I will always help family members and would never charge them, but working with friends, in my opinion, is just not worth it.*

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- One of my best business strategies was the decision to not take friends on as clients. I will always help family members and would never charge them, but working with friends, in my opinion, is just not worth it. Instead, I tell them that as a favor I will help out informally, without taking any payment. I provide several hours of help and advice, and that's the extent of my help for friends. In

return I ask them to refer me to their friends, and I'm happy to take them on as clients.

- I don't charge family. That extends to siblings, cousins, nieces, and nephews and their children.
- I offer a 20 percent friend discount. If I'm working with the child of someone who is not a friend, but whom I "know" in some community context, I offer a 10 percent discount. I also take on a number of pro bono students. Everyone pays something, but the amount varies greatly. My referral source for pro bono students gives me background on the family's situation and then I negotiate.
- I have been discounting, but I always regret it given the amount of work/time I spend. However, I'm also relatively new to the field and I often like I need to discount my fees based on that alone.
- I give all friends and family \$500 off a package or a \$20 per hour reduction in my \$220 hourly fee.
- I've worked with many students of friends and family (discounting 20 to 50 percent or to almost zero at times). I discount my rate according to how close a friend they are and also according to their means. I've learned it's important to always charge something, even a small fee of \$100. Be sure they sign your contract and know you are offering a professional service so they treat you accordingly. Ask yourself what you would want them to charge you, if they were offering you the service. You can also look at it as building your brand and marketing goodwill. If there are siblings coming up, keep that in mind too!
- I discounted 20 percent initially and then realized it was too much, so now I knock \$100 off the price of a package. I found that I put in extra time with students and families I know. I think at the end of the day, it is what you are comfortable with. 

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