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Fall 2021

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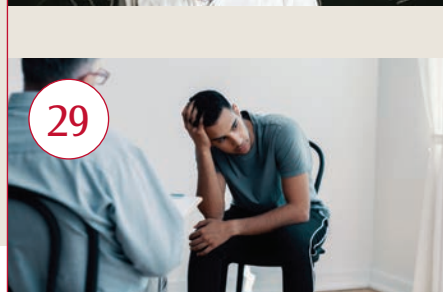
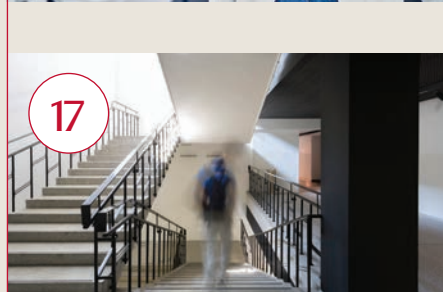
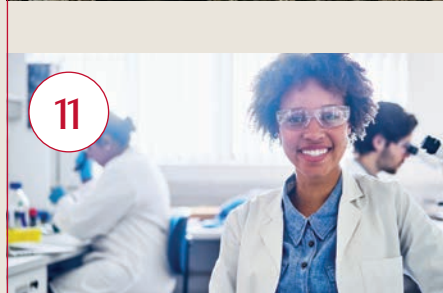
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Published by:
**Independent Educational
Consultants Association**

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President's Letter

Deciding to Commit to Success

During a recent virtual event I noticed a sign on the wall behind a fellow attendee:

Decide.
Commit.
Succeed.

Those three words stuck in my head when the meeting ended. It almost felt serendipitous that 1) I'd even noticed this amongst the dozens of Brady Bunch-like squares on the screen and 2) that the message delivered so succinctly by that sign was exactly what I needed to see that day. It just so happened that that morning I had the crazy idea I should run a half marathon in late fall (come on, I know you all have crazy ideas like this, too!). However, I hadn't yet made a decision because I wasn't sure I could **commit** to the training involved and, to be honest, I didn't have the confidence that I would follow through with it.

It seemed like this literal sign was telling me that all I had to do to successfully

complete a half marathon would be to make the decision to do it and follow through on that **commitment**. Because the definition of success really depends on personal goals, I realized that just crossing the finish line after those 13.1 miles would be good enough for me, regardless of how long it might take. But, again, I really struggled with whether or not I could **commit** to the amount of training miles required to even be able to finish.

When I think of this "plan" in the context of our work as independent educational consultants, I'm reminded of the many IECA Summer Training Institute attendees I've met over the years who have told me that they applied to participate in STI because they decided they were ready to **commit** to joining this profession. For some this has meant changing careers completely, while others have transitioned from the other side of the desk at a school, college, or program. For most the decision of whether or not to make the move to IEC work was the easy part. **Committing** to



Kristina Dooley

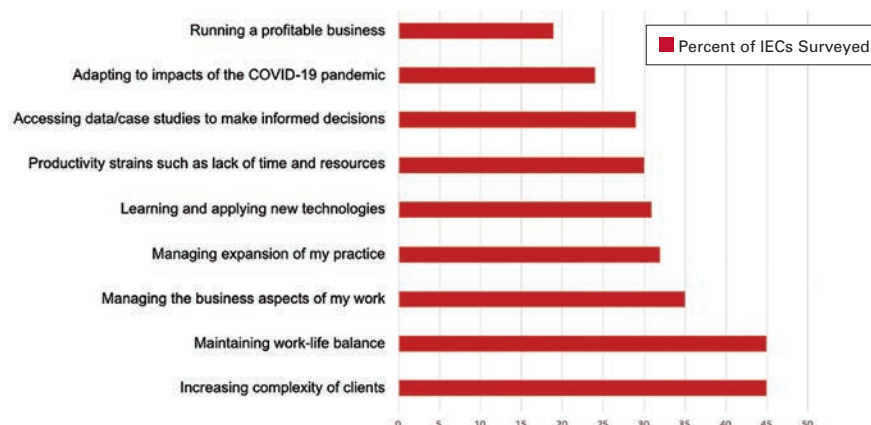
the training and professional development needed to get them up to speed in this realm is the hard part. Those who leave STI focused on a **commitment** to this work are the ones who find success on their new journey.

So often I hear from new IECA members that they are pleasantly surprised by how collaborative and giving our members are of their time and expertise to support others in becoming exceptional IECs. To me this **commitment** to bettering our profession should be something we all strive to do. In fact, I believe that if we were all to **commit** to helping just one new IECA member grow as an educational consultant, it would raise all of us as a united profession of experts. Here are just a few great examples of members who have been recognized for their leadership and **commitment** to serving others this year:

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In Focus

Snapshot from IECA's 2021 Strategic Plan Survey: Top Challenges IECs are Facing



Watch for additional survey results and more from the Strategic Planning Committee in the coming months.

Calendar

For the most up-to-date calendar of events and more details, visit the home page of the IECA Member Network: network.iecaonline.com

NOVEMBER

08	IECA 2021 Virtual Fall Conference (November 8–12)	15	SE K-12 Schools Regional Group Meeting	16	WI Regional Group Meeting	17	European Regional Group Meeting
18	Black IECs Affinity Group Meeting	19	Associate & Students Members Virtual Roundtable Professional Members Virtual Roundtable	24	Global Gathering Open Forum	25	IECA office closed (November 25–26)

DECEMBER

08	Gateway to Graduate School Consulting	09	Black IECs Affinity Group Meeting	10	Business Roundtable	14	WI Regional Group Meeting
15	European Regional Group Meeting	17	Associate & Students Members Virtual Roundtable Professional Members Virtual Roundtable	24	IECA office closed	29	Global Gathering Open Forum
31	IECA office closed						

JANUARY

12	Gateway to Graduate School Consulting	13	Black IECs Affinity Group Meeting	15	Professional Members Virtual Roundtable	19	European Regional Group Meeting
20	IECA Virtual Professional Member Retreat (January 20-21)	26	Global Gathering Open Forum LD/ND Virtual Roundtable				

IECA 2021 Virtual Fall Conference November 8-12

This year's virtual Fall Conference features a record 88 educational breakouts and discussions as well as six pre-conference workshops that you can join live or recorded. All sessions will be available to registered participants until December 30, 2021. For more information, visit: link.iecaonline.com/conference-info

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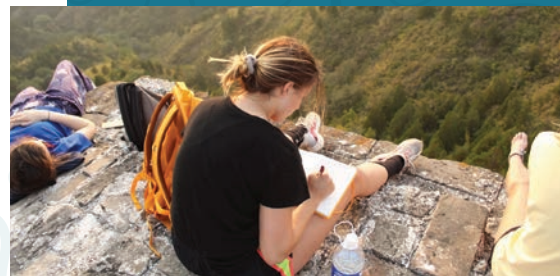
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What IECs Need to Know Today about Student Mental Health

By Christopher Thurber, PhD, Associate Director of Counseling and Psychological Services, Phillips Exeter Academy and Founder of Prep4School.com

Admiring a photograph of an expert climber flashing a frosty smile and waving a tiny flag on the summit of Mount Everest is radically different from actual Himalayan mountaineering. Similarly, admiring a school or college website, replete with carefully curated student profiles and teacher bios, impressive admissions statistics, majestic buildings, and lush lawns is radically different from the daily grind of studying.

Of course, marketing an experience and living that experience are never the same. Parents know that. Independent educational consultants (IECs) know that. But who is informing the kids? If students' increasingly severe social and emotional adjustment problems¹ are any sign, the answer is: no one.

Vibrant but Suffering

Many schools and colleges offer outstanding educational experiences. The facilities, faculty, staff,

and coaches provide wonderful instruction; the wholesome values and leadership opportunities promote sterling character; and, where it exists, the diversity of the student body challenges students' assumptions in healthy ways.

The vibrancy of these communities has kept me working in them for nearly three decades, but students' declining mental health suggests that vibrancy alone does not make students successful.

Many factors have contributed to modern students' mental health problems, such as family history; stress associated with racial or sexual minority status; poverty and limited access to mental health care; neighborhood violence; and unhealthy parental pressure. Unfortunately, IECs cannot change the past. But they can change the future.

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You can learn more about Christopher Thurber and contact him through his website: DrChrisThurber.com

¹ Centers for Disease Control and Prevention. [2019] Youth Risk Behavior Surveillance System. Available at: www.cdc.gov/YRBSS (Note: Data from the 2020 YRBSS are not yet available, but the 10-year trend between 2009 and 2019 showed a steady increase in emotional distress among secondary school students.)

- IECA members **Herbie Walker** (NV) and **Stacey Cunitz** (PA) have both been elected by their regional Associations for College Admission Counseling to the role of president-elect. We are thrilled that we will have IECA members leading WACAC and PACAC and demonstrating the **commitment** that IECs have to supporting students and colleagues in the higher education space!
- **Karen Mabie** (IL) was honored this year by Embark Behavioral Health with their Distinguished Service Award. Karen's **commitment** to helping both the families she supports and new therapeutic consultants is unmatched. She is truly a gem in our profession!
- During the annual conference of the National Association for College Admission Counseling this fall, IECA member **Yvonne Espinoza** (TX) was recognized for her **commitment** and dedication to serving historically underrepresented students on their postsecondary journeys with the NACAC Inclusion, Access, and Success Award. Yvonne's work in this space has truly contributed to the success of so many young people.

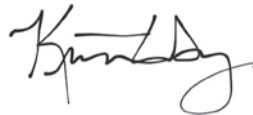
These few examples remind me of one of my favorite quotes from Howard Schultz, former CEO of Starbucks:

*When you're surrounded by people who share a passionate **commitment** around a common purpose, anything is possible.*

I truly believe that our collective decision to commit to supporting students, families, and one another means we are destined for success as both individuals and as an Association. Being surrounded by others who share that same "passionate commitment" to the good work that we do as educational consultants makes me proud to serve in my current role.

I truly believe that our collective decision to **commit** to supporting students, families, and one another means we are destined for success as both individuals and as an Association. Being surrounded by others who share that same "passionate **commitment**" to the good work that we do as educational consultants makes me proud to serve in my current role.

And that half marathon I signed up for? I'm on my way to checking off that last word.



Kristina Dooley, MA, CEP
IECA President



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Balancing the Message

The yawning gap between students' pre-matriculation fantasies and their post-matriculation reality creates predictable shockwaves in students' social and emotional adjustment. For example, schools' marketing materials never mention the massive homework load, the intense atmosphere of social conformity, the penetrating pressure to excel, or the self-discipline demands that students confront when they make the transition from their old school to one with competitive admissions.

We cannot expect all schools to balance their marketing messages with some sobering description of the hurdles students will face when they matriculate. However, a few forward-thinking schools do address mental health as soon as students accept their offer of admission. At some schools, for example, Counseling and Psychological Services and the school's Health Education teachers correspond with new families to help welcome and orient them. At other schools, the student leaders (proctors, prefects, student listeners, and team captains) receive training in conflict resolution, peer support, and how and when to make a referral to a professional provider.

These and other efforts to promote positive adjustment help prevent some serious mental health problems, but two roadblocks remain: (1) Not all schools are so forward-thinking; and (2) No schools offer objective information on their true demands. Fortunately, world-class IECs can remove both roadblocks and pave the way to student success.

Fortunately, world-class IECs can remove both roadblocks and pave the way to student success.

Win-Win Strategies

More than ever, IECs' success is measured by not only *placement* rates, but by *retention* rates and other indicators of students' well-being after they matriculate. Simply put, if they do well, you do well. Especially in these post-pandemic times, families are asking, "How do your students do socially and emotionally after they enroll?" If you want to provide an encouraging answer to this question, you will need to close the gap between a school's *advertised* experience and a client's *actual* experience.


Here are four win-win consulting strategies that boost student success:

1. **Match.** From the start of your relationship with a client family, emphasize goodness-of-fit as one of your guiding principles. When you are able to match a school's strengths with a student's strengths—in spirit, mind, and body—you are stacking the odds in everyone's favor. Of course, many parents and students will want to want to apply to some schools based solely on reputation. That is fine, as long as you also share your professional assessment about each school's goodness-of-fit for the student in question.
2. **Equip.** Just as successful mountaineers equip themselves with the right gear for a challenging new climb, your client families



need the right coping strategies to successfully navigate the transition to a rigorous school. There are healthy and unhealthy ways to cope with separation anxiety, academic pressure, packed schedules, and a complex social environment. Remember: Families who are equipped with adaptive skills and attitudes enjoy smooth transitions and fruitful school years.

3. **Practice.** Early in your relationship with a client family, caregivers and kids will tell you what they imagine they want. That, of course, is important data because it will help you begin finding schools that match those preferences. Equally important, at this early stage, is your recommending that caregivers and kids practice what it will take to be successful once they matriculate. For example, all students should take ownership over their schedules and homework, endeavoring to manage their time, sleep, homework, and family responsibilities *without any reminders from parents*. (This turns out to be as hard for parents as it is for students. Certainly, it is eye opening for both parties.) Forming healthy habits now, long before the transition to a new school, will help students get much more out of their first year.
4. **Support.** As an adult peer, you are in a uniquely influential position to coach parents on the healthiest ways to support their child. So, talk with them about how to listen, encourage, and assist with love. Remind them that their child's maturation will be gradual, uneven, and full of trial and error. Connect them with other families whose children have done well artistically, athletically, or academically and invite them to ask questions and share ideas. Follow up with parents after the first week or two of school to find out not only how their child is doing socially and emotionally, but how *they* are holding up as parents. Empathize with their hopes and fears and offer trusted resources and gentle advice. After all, happy parents are the best ambassadors for your services.

Taken together and customized to suit your professional style, these four strategies are powerful ways to bridge the gap that would otherwise exacerbate social and emotional problems for students—the gap between students' pre-matriculation fantasies and their post-matriculation reality. Schools are doing more to help these days—in terms of both prevention and intervention—but marketing concerns will always limit their effectiveness. Fortunately, this limitation is your opportunity, and the outcomes benefit everyone. 



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The Impact of Student Participation in High School Research Programs on College and Career

By Julie Raynor Gross, EdM, MBA, CEP (NY)

Since 1988, Gail Richmond has spent summers welcoming rising high school seniors to Michigan State University, where they devote seven weeks to conducting research while living on a college campus for the very first time. “It’s the kind of experience you have when you go to college, hopefully,” Richmond says of the Michigan State University High School Honors Science/Engineering/Mathematics Program, or HSHSP, the oldest, continuously running program of its kind. “I see it as a bit of a microcosm for college.”

Over the course of the summer, two dozen HSHSP students who have made it through a rigorous selection process engage in original research in science, engineering, or mathematics under the guidance of university mentors. They keep a weekly journal that Richmond reviews, write research proposals and a paper summarizing their work, and, in the last week of the program, give a conference-style talk. “We have sessions about, how do you read a scientific paper? How do you write a scientific argument? Why is an argument that you make in

an engineering paper different from one that you might make in a biology paper?” Richmond says. “Those are skills that they will build upon if they go into the STEM areas. But I also think they’re skills that are just broadly helpful as they become college students.” Beyond facilitating academic work and adding an impressive line to college applicants’ resumes, HSHSP gives soon-to-be college students a chance to practice living away from home, and leaves plenty of room for bonding; often, the most fruitful conversations happen after 5 p.m. or on the weekends. “There are other aspects of the program that are just as important as the research experience,” Richmond says.

What is High School Research?

HSHSP is one component of the broad network of high school research programs. Typically, students’ involvement starts in their own high schools, where they enroll in research programs that last anywhere from one to all four years. Some high

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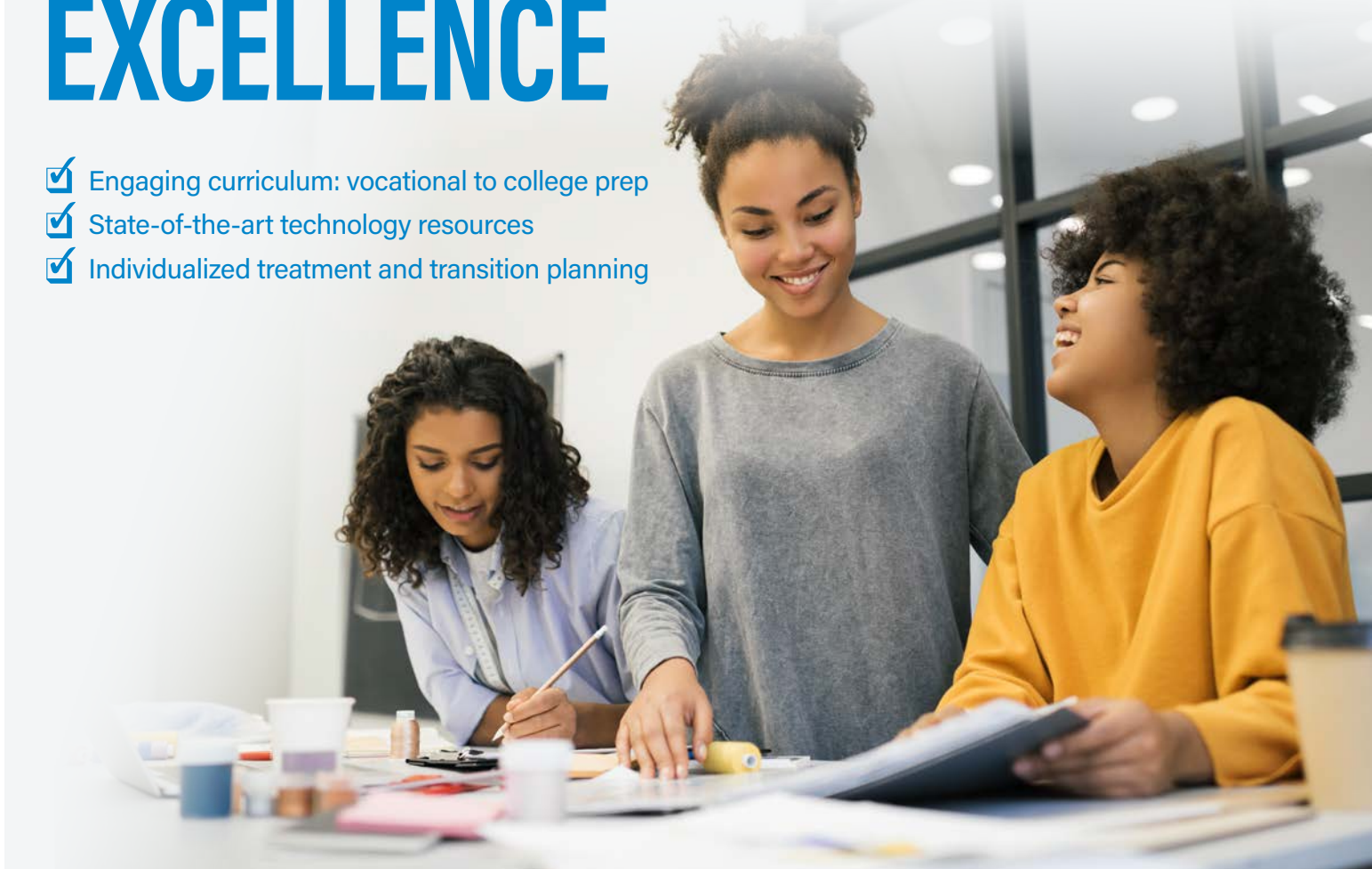


Julie Raynor Gross, Collegiate Gateway LLC, can be reached at julie@collegiategateway.com

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schools have one overall program, combining students in science, math, engineering, and social science research, while others have separate programs; some high schools select only a percentage of student applicants, while others allow students to self-select in; some have a list of mentors with whom the students can work, while in others, students find their own research mentors, which can include attending university programs like HSHSP. Regardless of the projects students pursue, their research activities culminate in a concrete presentation of results and conclusions, which can range from oral presentations at science fairs to a 20-page scientific paper written according to a scientific protocol and submitted to national competitions like the prestigious Regeneron Science Talent Search, which students can compete in during their senior year. What unites research programs is their commitment to training students in the fundamentals of research, writing, presentation, and participation in an academic community.

At Ossining High School in New York, for example, students apply to the Science Research Program in their freshman year in order to participate sophomore through senior years. Angelo Piccirillo, who founded the program in 1998, and Valerie Holmes, who has been co-teaching it since 2004, accept about 35 students out of the 100 that usually apply each year. "We look for kids that are passionate about learning," Piccirillo says. Curiosity and a desire for a different experience than they've had before are more important than an aptitude for science in particular, he explains. Holmes adds: "We're looking for kids who want to be challenged beyond typical science curriculum."

Since 2001, Ossining's Science Research Program has had 83 students place as semifinalists, and six as finalists, in the national Science Talent Search competition, which select 300 semifinalists each year out of about 2000 entrants. "These things bring you notoriety, but it's just one dimension of the program," Piccirillo says. "We don't ignore the human factor. We don't ignore the fact that kids need emotional support." He and Holmes work hard to foster collaboration between students: each class has a mix of sophomores, juniors, and seniors, which "allows the students in the program to form friendships and bonds across grade levels," Holmes says, and to "see one or two years into the future so it's not so scary." As students pinpoint the nature of the research they want to do, seek mentors they've identified as experts through literature, work on independent projects, and present their findings, they turn to not only their teachers but also their classmates for advice and modeling. "The kids always describe it as a family," Holmes says. "They feel like no matter what happens, they have their team there to support them." This emotional support is vital as students try to meet the high standards the program sets for them ("We don't accept mediocrity, so the kids learn right away that just getting by is not good enough," Piccirillo says), and as they move through the frustrations that independent research inevitably engenders. Unlike in a science lab, out in the field, following instructions doesn't yield a "correct" answer, and unexpected hurdles often present themselves. "Science requires resilience," Holmes says. "Part of my effort in the classroom is to normalize the struggles that come with science and to make them realize that that's just part of the natural process."

Unlike in a science lab, out in the field, following instructions doesn't yield a "correct" answer, and unexpected hurdles often present themselves.

Stephanie Greenwald, who directs the Dr. Robert Pavlica Authentic Science Research Program at Byram Hills High School, also in New York, places a high premium on emotional skill-building and community as well. Unlike Ossining's research program, her program is self-selective—anyone who wants to can join—but that "doesn't mean that anyone who wants to can make it through," she says. There is an intense application process, including submitting and revising essays multiple times, as well as giving a PowerPoint presentation in front of other students. "That kind of weeds kids out," Greenwald says; often, the program loses 10 to 20 percent of students per year. Those who remain, though, are interested in meeting the challenges of both doing and presenting research. Greenwald does everything she can to help them build the skills they need to get there, including fostering a strong sense of community between students. "I worked at summer camps for over 25 years," she says. "There's a lot of silly rituals that take place in my class that feel like camp." Her program, like Piccirillo and Holmes', has classes of mixed grades, "and our seniors set the tone," she says. They give daily announcements, role play phone calls with mentors, and even do some of the teaching. "The teachers are more coaches, and the students are learning from each other," Greenwald says.

Succeeding in the program, Greenwald says, requires passion for the topic being studied (though this *doesn't* mean feeling

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passionate about it every day); the capacity to grasp knowledge, which takes time and patience to develop; and organizational and time management skills, which the program teaches them. “We really feel strongly that students can study anything they want,” Greenwald says. Students have recently studied infant laughter, sustainable fashion, and relationships that people have with television characters: “If you can measure it,” Greenwald says, “you can study it.”

Beyond what students gain from working with teachers and with each other, they often get a lot out of their relationships with research mentors at labs and universities, and through summer programs like HSHSP. Mentors volunteer to guide students through their work or incorporate students into their own original research projects, not for any compensation but out of generosity. “We really need to recognize the spirit of the researchers that are willing to help the kids in models like ours,” Piccirillo says. “I also would appeal for those that are considering it to really step forth, because we have so many kids that are willing to take the risk.”

Students’ Experiences in Research and Beyond

One of the biggest takeaways for the participants in research programs is often the necessity and capacity for persisting through challenges. Nicole Camilliere, who graduated from Ossining High School this past year, spent her time in the Science Research Program studying how salt pollution affects water and wildlife. Her project involved taking samples once or twice per month by

hand, plus relying on a secondary sensor. Unlike the hand samples, the sensor measured temperature in addition to conductivity, and provided minute-by-minute data. Camilliere faced a major challenge when, during a routine cleanup, the sensor was removed at one point, wiping out all the data. For that period of time, Camilliere had no choice but to rely on the hand samples alone. But, thanks to Piccirillo and Holmes’ teaching, she’d been alerted to the fact that challenges would arrive, and she was not discouraged: “When you stumble across a problem, you’re going to have to find a way to keep going.” Camilliere’s findings, which suggested that the overapplication of road salt surpassed drinking water standards and that the salt applied in winter stays put in summer, infiltrating streams year-round, won her a semifinalist title in the Regeneron Science Talent Search. Beyond this prize, she credits her experience in the program with helping her build presentation and communication skills; fostering perseverance; and instilling the value of working in community and as a team, something she imagines will help her in any job she has going forward. “Programs like this give you experiences you’re not going to get anywhere else,” she says. Holmes, who runs the program’s alumni group, can attest to that: “When you talk to the kids now, 10, 15, 20 years later, they’re still keeping track of how well we’re doing,” she says, which “means to me that we’re making a difference in the community.”

Nicole Meyers, who was a member of the Science Research Program at Schreiber High School, from which she graduated in 2010, did bench research at Columbia University that earned her a semifinalist award from the Intel Science Talent Search. “It was organic chemistry, which I had obviously never even been exposed

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to,” she says. Her first day, her research major gave her a huge stack of organic chemistry textbooks. Under her mentor, Meyers worked in a lab trying to optimize the conditions around the creation of the porphyrin molecule, which has many applications in biology and medicine but is “particularly challenging to create at high yield.”

One of the biggest takeaways for the participants in research programs is often the necessity and capacity for persisting through challenges.

Through this project and her participation in the program throughout high school, Meyers learned basic research methodology, which served her both in college at Cornell University and in medical school at NYU. (Meyers is now a pediatric resident at New York Presbyterian / Columbia Medical Center, so: she’s come full circle.) She also built presentation skills she’s relied on since, especially in the final year of the research program, during which she presented her work to both classmates and parents. “I was figuring out how to present it so that the layman could connect with this project in some way, and I feel like that’s a skill that has served me so well,” she says. Beyond these academic skills, she connected deeply with her small research program cohort. Among the 10 of them, “there was definitely a lot of camaraderie and a lot of teamwork,” Meyers says. “One of my best friends is still from the science research program.”


Many research program students, like Meyers, go on to study and work in STEM fields in college and beyond. As a high schooler in Melbourne, Florida, David Troner conducted research on the aerodynamic benefits of wing tip devices on airplanes, an extension of his personal passion for aviation and flying planes. He went on to pursue a dual major in aerospace and mechanical engineering at the University of Florida at Gainesville, where he also started a club to build a small airplane. At UF, Troner’s research explored flexible wing designs for small UAVs (Unmanned Air Vehicles). “I was always interested in the aerodynamic side. It seemed like black magic, how planes fly. And wings were the poster child of aerodynamics.”

After college, Troner continued to explore the inner workings of planes at Northrup Grumman, where he designed “fly by wire” software that links the pilot’s input with how the plane’s surfaces move. He then undertook a master’s in aerospace engineering at Stanford and made a significant pivot from his interest in aerodynamics to the design side, “the early stage of thinking about ideas, the classic sketching of ideas on the napkin. What if we tried this? What if we tried that?” Troner is now a conceptual design engineer in Hyundai’s relatively new division of Urban Air Mobility, designing air taxis.

Just like Meyers, Troner keeps learning and adding new skills in his chosen field. His next step is to attend Stanford’s Graduate School of Business so that he can learn how to build the infrastructure to support urban air mobility vehicles. “There’s a whole ecosystem on the business side that I want to transition to: figuring out the back-end of how to actually make this a service and bring it to a city near you.” Troner feels that his early research in high school “set the foundation for exploring different configurations and trying novel ideas.”

But other research program students build professional lives far afield of STEM work, as lawyers, novelists, teachers, and more. No matter what, their research experiences are likely to benefit them: “Learning how to read and write and think and talk in coherent and compelling ways are skills that everybody should master,” HSHSP’s Richmond says.

“We want their projects to be great, we want their projects to be meaningful, and even, perhaps, add to the knowledge base,” Piccirillo says. “But at end of day, what is it that we really want? We want to teach the kids how to be functional adults. So, what does that mean? I’m able to meet my challenges. I know I’m going to be stepping on some potholes. I need to get up. I need to keep moving.”

When I work with high students on research, I explain the potential benefits of participating in such programs at the personal, collegiate, and career levels. Once they’ve committed to pursuing research, we work together—through dialogue as well as personality and interest assessments—to identify where their interests lie. Do they gravitate toward science, math, engineering, or social science? For their senior year summer research project, would they prefer to participate in a university program, find a mentor locally, or design their own project? We then look for appropriate research opportunities that match their interests and their preferences. Finally, I guide students through incorporating their research experiences into their college applications through their essays, resumes, activity sheets, and interviews, and—most importantly—help them imagine how they can build on these experiences in their college years and beyond. 

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Navigating Leave of Absence and Withdraw Policies in College: Why We Need to Know

By Joanna Lilley, MA, NCC, IECA (MI) and Adrienne N. Frumberg, MA, IECA (CT)

Mason was thrilled to start an elite engineering program within a large university during the fall of 2020. His college made the decision to have students reside on campus and attend some courses online and some in person. Six weeks into the semester, Mason's mental health issues began to take a toll and interfere with his ability to complete his schoolwork. With his family, Mason made the difficult decision to withdraw from his five courses and return home.

During the past year and a half, greater numbers of undergraduate students have chosen to take a leave of absence from college. Students are more readily considering a leave, whether it is due to mental health reasons as a reaction to the COVID-19 pandemic, the impact of virtual or hybrid learning models, or taking an interest in waiting until school returns to in-person learning. For some, this process can be anxiety-provoking and daunting. Being accurately informed in the leave of absence process or the retroactive withdrawal option is of critical importance.

What is a leave of absence, and why do students consider taking one?

A leave of absence is a prescribed amount of time when a student is no longer enrolled in classes at a college or university they are enrolled in as a matriculated student. While on a leave of absence a student maintains the intent to reenroll at their

college or university. The length of time for a leave of absence can vary from weeks, months, or even in some cases, years. Depending on the university, this break could be titled as Planned Leave, Planned Educational Leave, Planned Academic Leave, Personal Leave, Medical Leave, and Leave of Absence, just to name a few. For the sake of this article, we were referring to all leaves as "leave of absence."

Students can request a leave of absence for a variety of reasons. Reasons include, but are not limited to:

- Mental health issues and their treatment (anxiety, depression, sleep disorders, substance abuse)
- Medical diagnoses or illnesses (acute or chronic)
- Emergencies (family or otherwise)
- Accommodations not being met for a health condition

All of the above reasons for a leave of absence can be seen in a proactive light. The student acknowledged they needed a break and opted to leave before or during a semester. They are also alerting their university that they are taking time off to get the appropriate help needed and intend to return. Referencing student "Mason" from the beginning of this article, his example could have fallen within this category. It also could have been a university withdrawal.

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Adrienne N. Frumberg, Lighthouse Guidance LLC, can be reached at adrienne@lighthouseguidance.co



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What is a university withdrawal, and why would a student do this?

Some students don't know about "leave" options and merely withdraw from their college or university. A university withdrawal is when a student withdraws from the entire semester's worth of classes, after the semester has begun. It negatively impacts a student's Student Academic Performance (SAP) which impacts their Financial Aid eligibility. With a university withdrawal, there is no indication to the college or university that the student will return the following semester, unless they are already registered.

What is a retroactive withdrawal, and how can a student obtain one if needed?

A retroactive withdrawal is the petitioned request for an undergraduate student to be removed from a prior semester, or in some cases, multiple semesters due to documented circumstances that inhibited the student from performing in their academic courses. A reason to pursue this would be if the student didn't complete a university withdrawal or take a leave of absence and was not able to academically succeed due to extenuating circumstances. Institutions of higher education do not advertise or market this appeal process for students. Additionally, some schools limit the number of semesters one can apply for or stipulate that if it's not completed one semester after the extenuating circumstances that they aren't eligible to apply. For anyone working with college students, it's imperative to direct families and students to these policies.

How to request a retroactive withdrawal:

1. Make contact with the student's academic advisor and share the concerns prompting the petition for retroactive withdrawal.
2. Find out what documentation or forms must be completed and who they should be submitted to within the university. Many colleges require a written statement about the circumstances leading you to submit the retroactive withdrawal request.
3. Request letters of support as supplemental documents for this application. A letter of support can be written by a mental health professional or medical professional. Supporting documentation could include a death certificate of a family member, hospital discharge, or treatment discharge paperwork. Whatever the extenuating circumstances, find documents that can support the personal statement submitted.
4. Review this statement with the academic advisor and ask for feedback. If the student is not close with their academic advisor, I would direct them towards a professional who works in and understands student affairs and can provide guidance. The most valuable advice for this is to be objective about the situation, and for the student to take accountability for their actions.

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- Submit the statement to the appropriate person or review board on campus. Sometimes this person may be called a director of student advocacy or affairs. Then wait to hear back from the committee on the results of your application. This can take up to four weeks and, if approved, may take another three weeks before the change is reflected on the transcript.

Tips IECs should provide to their families and clients who are considering a leave of absence, university withdrawal, or retroactive withdrawal:

- Research the specific college's leave of absence, university withdrawal, and retroactive withdrawal policies. Each policy is different. Encourage the student to speak with their academic advisor, if possible, about the best course of action for their situation.
- Create a paper trail. Colleges require dated documentation from healthcare providers when requesting a medical leave of absence or retroactive withdrawal. It's better to have this and not need it, than need it and not have it.
- Meet the prescribed deadlines set forth by the colleges and universities. You may have to dig for this, but once you find it, make sure the student and family understands what happens if they miss a deadline.
- Connect with the Office of Disability Services or Accessibility as needed to seek clarification on accommodations for a student's return to campus. It would also be beneficial for a student to connect with the Case Management office to ensure that their return to campus includes being supported by professionals in other offices.
- Inquire about how a specific leave (leave of absence, university withdrawal, or retroactive withdrawal) will impact Student Academic Progress (SAP) and subsequently impact Financial Aid eligibility. Every decision made on campus has potential consequences. Be aware of how one type of withdrawal will impact a student's status moving forward.
- Help a student and family understand that taking a leave of absence is okay! College will be there when the student is ready to return. It's important to normalize how this may show up on their transcript (depending on the college or university), but it won't impact their GPA (unless we're talking about retroactive withdrawal). If a student isn't balanced in all areas of well-being, it's hard to be a healthy student.
- Try to connect the parent of this student with other parents who have "been there, done that." It's easy for parents of college students to truly feel isolated and alone in supporting their child. If the parent also has a support network, the student's time away from school can potentially be less shaming. 

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Winter Break Tips for First-Year Students and Their Families

By Mya Andersen, College Achievement Coach at College Connectors, and Chuck Erickson, MEd (WI), College Achievement Coach at College Connectors

First-year students have settled in, and the fall semester will be over before students realize it. They are looking forward to celebrating the holidays, seeing friends, and avoiding homework. Parents are excited to welcome their students home and hear every detail about how the first semester has gone.

Holiday breaks can lead to expectations, and expectations can lead to misunderstandings and miscommunication; this is why an IEC checking in with first-year students and their families in early November is a good idea. As an IEC, you have worked hard with these students, and their families, to find a great college fit. You have helped these students and their families navigate the college search, brainstorm essays, and complete applications, and congratulated the students when they were accepted. Before holiday breaks is the perfect time to follow up and ask how the students are doing, answer any questions, and offer encouragement to both the students and their families.

Here are some holiday break insights that IECs can share with both families and students to help them best prepare for the first long visit home.

- **Change.** Both the family at home and the student at college have changed, but it's easy not to mention it in phone calls or texts. Maybe the student's room has been converted into an office, or there's a new pet or even a new house. Remind families to let their student know this before they come home for the holidays and invite their student to share how they feel about it. Have a plan for the student to have a place to "land" and find the comforts of home they may have missed. Parents should be ready for a student with different clothes (probably dirty laundry), new life habits, and unique opinions.
- **Curiosity.** Families want to know *all* the things about their student, and the student may not be ready to share all the things. This is especially common over Thanksgiving break because it's usually right before finals, and families want to ensure that students are prepared and confident about their first round of college final exams. Be respectful of the student's boundaries and understand that these boundaries may have been part of a coping mechanism they used while living in a community space. Ask open-ended questions and give your student time to think and respond.

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Chuck Erickson can be reached at chuck@collegeconnectors.com

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- **Reunions.** The student may want to spend all of their time with their friends from home; it doesn't mean they haven't missed their family. It's easy for misunderstandings to happen when everyone wants equal time, and equal time may not represent the same thing for everyone. Encourage students and families to talk about this *before* the break. Will the student have a curfew while home? What other house rules will stay the same or change?
- **Relationships, old and new.** If the student and their high school significant other have continued their relationship after going to different colleges, they will want to catch up on lost time. This is normal. The pattern of high school relationships is often a joyous reunion at Thanksgiving and then a breakup during the winter holidays (sometimes called "the Turkey Drop"). It is the evolution of high school relationships when two students are not attending the same college. Share with your families that this may happen and the student will need their support and care, even if they indicate otherwise. The student may have a new significant other that they are over the moon about and want to spend some of their winter break with that person. Remember that young adults live in the here and now. Remind families to be open to this request and communicate clearly, even if it wasn't their plan for winter break.

The student may be struggling academically and has not talked to their family about their struggles. They may be aloof when questioned about how school is going because they don't know how to share that they are worried or unsure. For families, this can be off-putting and frustrating. Don't assume the worst.

- **Academics.** The student may be struggling academically and has not talked to their family about their struggles. They may be aloof when questioned about how school is going because they don't know how to share that they are worried or unsure. For families, this can be off-putting and frustrating. Don't assume the worst. Ask if there is anything they learned after their first round of college finals. If the student is taking finals after being at home, send along a care package of goodies for them to power through to the end.
- **Positive support.** Encourage families to offer positive reinforcement and encouragement. The student may have decided on a different major, changed roommates, or colored their hair. This is a time when young college students are trying to find their identity and purpose in life. Remind parents to reassure their student that they love and care about them.
- **Asking for help.** Use this time together to evaluate whether additional help is needed, whether it's college-based resources, tutors, therapists, or a college achievement coach. A college achievement coach helps the student navigate their first year of college and offers insights to families on what they can do. 

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Four Easy Steps That Can Change a Young Person's Life

By Kristi Stoll, Founder, KidVisionaries.com

What is your dream? Do you still have one? Are you living it? Have you thought about it recently?

At a young age, kids are commonly asked questions about what they want to do when they grow up. And because they are young, most often times, they are encouraged and celebrated for those dreams no matter how imaginative they are.

What happens as kids get older? Are they still encouraged to dream “the impossible” and to follow their passions?

According to experts, toddlers hear the word “no” 400 times a day. If this is true, imagine how many times a child has heard “no” by the time you are working with them.

Unfortunately, if kids are not supported at an early age to be themselves and to follow their passions, they can end up feeling shut down, invisible, with no self-esteem and zero confidence to go after what they really want in life. Many kids/teens end up feeling unseen and unheard for who they really are. They have been criticized or told what to do and what not to do so many times, is it any wonder that they

get confused about what they want to do with their future? Or that anxiety, lack of confidence, and low self-esteem is at an all-time high amongst teens?

It is crucial for young people to have someone who is going to hear and see them for who they are and to encourage them to live a life they dream of. We all need that. Without it, we end up living a life that doesn't even feel like our own.

Because kid/teens are coming to you to help them plan their future, you have the unique opportunity to be that person—that voice that helps them find their true life path. You have the opportunity to change their lives in ways you can't imagine.

About 15 years ago, I traveled around the country with a friend interviewing kids and teens who had followed a dream and accomplished something magnificent: creating a successful business or peer group, becoming an inspirational speaker, selling out their first art gallery show, and more! The one common thread we found with each child was the support and encouragement they had to follow that dream.



Kristi Stoll can be reached at kristi@kidvisionaries.com

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Unfortunately, as we know, not every child has unlimited support and encouragement. By the time a young person is coming to you confused about what to do with their future, it could be because they have received mixed messages about what they are “supposed” to do with their life, instead of being encouraged to do what they want to do with their life.

Money might also be the issue for kids’ inability to follow a dream. Some parents simply can’t afford it and kids don’t have a lot of financial options on their own. Because of this, I created a safe online fundraising platform for ages 18 and under. It’s called The Virtual Lemonade Stand (*TheVirtualLemonadeStand.com*). It’s a place where young people can create fundraisers to have any dream supported and funded. My dream is to support any child who needs financial assistance to pursue their calling.

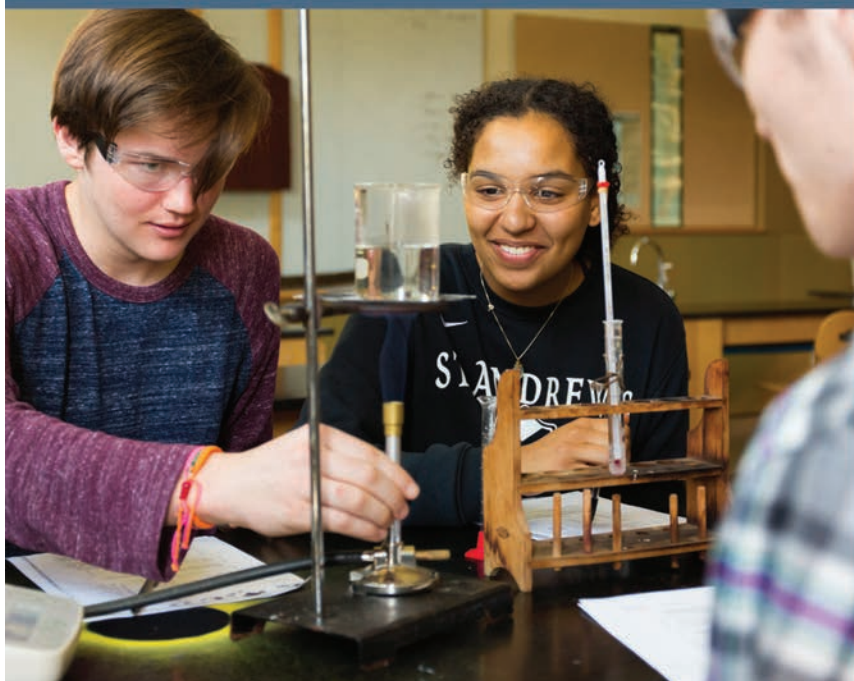
Middle and high school is the crucial time to encourage young people to discover their inner passions if they haven’t yet done so. Once they get through college and settle into a career, it becomes harder to change paths—especially if they don’t know what they would like to be doing instead and don’t have the inner strength and courage to switch directions.

Below are four steps to help guide and teach kids how to find their passion and realize their dreams. Along with your assessment tests, these are easy exercises you could use with your students to provide them with a safe place to uncover their dreams.

- 1) **Rediscover what passion and inspiration feels like.** Close your eyes and imagine seeing yourself doing something you REALLY love doing. It can be anything—laughing with friends, playing your favorite sport, doing something creative. Notice how you feel when you are envisioning this. Are you happy, excited, proud, energized, or all these feelings at once? It feels great, doesn’t it? This is also what inspiration and passion feel like!
- 2) **Find your dreams.** If there were no limits, what would you like to accomplish with your life? What is your dream? What would make you happy? What are you good at? How would you like to make a difference in the world? Create a list. Your life dreams can be anything; just let the ideas flow. Examples: Have you ever dreamed of being a singer or an artist? Working with animals, elderly people, or kids? Inventing something or starting a business? Cleaning up the environment or collecting toys or food for people? Exploring different cultures, learning different languages, or studying math, science, engineering, or different ancient histories? These are general ideas. Your dreams will be unique, more detailed and tailored for you, so don’t limit your ideas to these suggestions. And don’t be concerned about being right or wrong or if the dream is big or small. If it is a dream of yours, list it.
- 3) **Combine passion with dreams.** Look over your list of dreams. Using that feeling of inspiration, go down your list and focus on each dream for a minute or two. As you are focusing, imagine yourself in that dream. Really feel yourself in each dream. Are you getting that happy, excited feeling? (If not,

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that's okay.) Make a note next to the dreams that give you an inspired feeling.

Moving forward, you want to focus on the top dream(s) that give you the feeling of inspiration. That feeling is your guide. Your inspiration keeps you connected to the passion, excitement, and motivation you need to keep following a dream. If you don't feel inspired by a particular dream, it's probably not worth pursuing—at least for now. If you are ever in doubt about whether you are making the right decision, always check for this feeling. It is in your gut and it is your compass. That's why people call it a "gut feeling." It will always steer you in the right direction.

- 4) **Come up with a plan.** Now that you have more information about what your client's dreams are, you can combine those with their assessments and help them outline a life career and journey based not on what might look good on paper, but what your client can be excited about to accomplish in their life!


We all have inner gifts. Everyone. Those inner gifts are special attributes that are unique to only us. And they drive our passion, our life dreams, and our purpose.

I am incredibly passionate about encouraging young people to use their innate gifts and to follow their dreams. When any one person has the courage to live their passion, we all win. That person shares their journey, passion, and experiences with the world and it inspires countless other people to do the same. Imagine a world where we are all living our passion. Wouldn't we all live happier, healthier lives? And isn't this what we want for our young people? Isn't this what we want for ourselves?

Let's create a movement and change what we teach young people to value: themselves, their natural gifts, their own happiness, and a fulfilling life. In our movement, let's encourage the retirement of phrases like, "You aren't old enough," "You need to be realistic" or "Get a real job." Instead, let's ask them how they want to change the world or what their big life dream is, and then support them to get there. If they are serious about a path, let's help them understand the work and dedication their dream will take and assist them with steps for how to make it happen. No dream is ever too big when you have belief in yourself and the passion to make it happen.

You have an opportunity to inspire young people about their futures. To be that one person in a kid's life where they look back and think, "That person changed my life by listening to me, believing in me, and encouraging me to do what makes me most happy."

And then, make sure you are also doing that for yourself.

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What Does a Therapeutic Independent Educational Consultant Do?

By Jesse Quam, LCSW, ACSW (NC)

This title may seem like a silly question to ask in a journal for independent educational consultants (IECs). However, as we face impactful legislation and negative press, let's take a moment to look at the core elements of what therapeutic IECs offer for families.

We support. We gather relevant information into a coherent narrative. We aggregate the testing reporting, therapist notes, and each of the family members' viewpoints on the presenting client. This process can be time consuming and takes a very skilled listening ear. We show empathy and concern but also, when appropriate, try to move the family to decision points on treatment when not pursuing treatment could have dire consequences.

Some family systems can be supported with in-home services while others will need out-of-home treatment. Therapeutic IECs use our experience to help families make this decision.

We listen. We listen to the different family members and professionals involved in each case. We listen to the story behind the story. We ask ourselves what strengths and what vulnerabilities are in the family system. To get the full story from a family system you must have rapport with that family. It does not come easily at times, and we focus our attention on the words and the meaning behind the words. Mental health issues, substance abuse issues, and different parenting techniques can combine in a very complex system. The talented IEC listens in order to get the complete story.

We prioritize. When families are in crisis with a struggling child, the myriad of presenting issues can be overwhelming. As IECs, we can be dispassionate enough to help families what to focus on first, both in terms of care for the child and in figuring out how to heal the family system. While we honor the family's agency and choice,

continued on page 30



Jesse Quam, John Huie & Associates, can be reached at jesse@johnhuie.com

we help the family prioritize not only their strengths, but also their challenges. They may not recognize the full range of their abilities and shortcomings while in their time of crisis. As the IEC, in our place of stability, we can prioritize concerns among drug use, disordered eating, trauma, anxiety, and depression. Helping the family find a program that can properly treat the underlying mental health issues a big part of the job.

We offer options. IECs visit many, many programs each year, and also visit current clients at different programs. This helps us to get a good feel for how the programs work for specific people. We also collaborate with other consultants, sharing our collective knowledge to help each other. We keep our ears to the ground to know unique feature of each program. We work hard to suggest several programs that would suit each unique family.

We guide. Once the client starts in a treatment program, the job is far from done. Therapeutic IECs help the family navigate the treatment options for a full year or beyond. We talk to the program staff about our clients and we are on family phone calls with the program if the family desires. We monitor our client's progress

and help the family navigate the next steps, whether it is longer programming or developing healthy family contracts. We strongly encourage the family system to get the help they need—through family or individual therapy, webinars, or books—and pursue their own parallel process of growth.

We set healthy boundaries. We role model by creating and maintaining healthy emotional boundaries. At our best, we show the family the path to being balanced. While we may not share

every detail of our personal life, we can share parts of our own journey with them. These insights, combined with other treatment success stories, can help families foster hope in the face of overwhelm. While we maintain confidentiality, the resiliency and strength

of our former clients often sustains us through the most difficult dark times when a client is in the ER or a psychiatric hospital for substance abuse, self-harm, or mental health issues.

While this is not an exhaustive list for what the therapeutic consultant does, here is a case study to help paint the picture:

We receive a call from a family with a child in college who is in the hospital for suicidal ideation and drug-induced psychosis.

We keep our ears to the ground to know unique feature of each program. We work hard to suggest several programs that would suit each unique family.



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Hopefully this article gives readers a better idea of how a therapeutic IEC can serve a family through some of their toughest times. We work with attorneys that are well versed in educational law, school administrators, and therapists. There's also an opportunity to work alongside a college IEC as the client prepares for those academic pursuits. I hope that in the future we can highlight more of these crossover options. Therapeutic IECs serve clients all around the country and we'd be happy to connect you to one in your area. [A](#)

If you have ideas or questions around this topic, please reach out to me at jesse@johnjuie.com or my Therapeutic Committee co-chair, Ruby Laufer, at ruby@comcast.net.

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Connect with Your Peers in an IECA Affinity Group

IECA Affinity Groups are run by IECA members with similar interests in a specific topic. These member-led groups provide an opportunity to connect with a smaller group of your IEC colleagues to share knowledge, ideas, and goals.

To join an existing group and see the steps required to form a new one, visit: link.iecaonline.com/affinity

You can also join in their discussions on the Member Network: network.iecaonline.com/communities/affinitygroups

New Affinity Groups include:

Educational Heterodoxy

This group provides a forum for civil discourse and open discussions about issues in education that reflect the diverse perspectives of IECs and the diverse group of students they serve. Contacts: Jason Robinovitz (jason@scoreatthetop.com) and Sheree Gravely (Sheree@GravelyGroupCA.com)

Gap Year Information & Resources

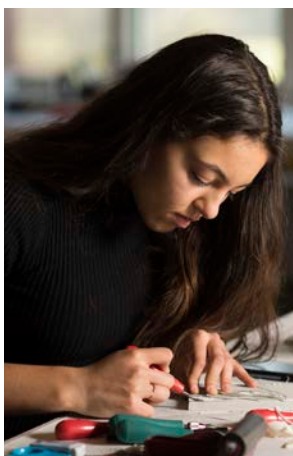
This group is for IECs working with students considering or taking a gap year and provides a forum to ask questions and share information about gap year opportunities, as well as to



share best practices, research, and other relevant resources. Contacts: Julia Rogers (enrouteconsulting@gmail.com) and Sandy Storer (sandy@agapaway.com)

Supporting Students Crossing Borders

This group is for IECA members who support students studying outside of their home country to discuss issues, collaborate, and connect by sharing inquiries, resources, experiences, and best practices. The group also serves as a space to seek referrals when a case exceeds your present level of expertise and experience. Contacts: Julia Gooding (julia@oneskyeducation.org) and Teo Salgado (teo.salgado@vervesmith.com)



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- Connect with IECA members in specific geographic regions by providing a presentation to one (or many) of our **Regional Groups**: www.iecaonline.com/ieca-regional-groups
- Attend our **Virtual Fall Conference**, participate in the Exhibit Hall, School Exchange, or College Fair, and become an event sponsor: link.iecaonline.com/upcoming-conference
- **Submit a proposal to present at an upcoming IECA conference or training workshop** on a topic related to admissions or student success: link.iecaonline.com/present
- **Invite IECA members to participate in announced in-person or virtual campus tours** and take part in consortia multi-day, multi-campus events [Contact: membership@IECAonline.com]
- **Advertise** in IECA's quarterly *Insights* journal or weekly 5 Minute News email for members: link.iecaonline.com/advertising
- Let IECA **help you find** a highly qualified, fully vetted professional educational consultant to work part-time in your organization's college counseling office: link.iecaonline.com/find-an-iec

For more information on how to connect with IECA members throughout the year, contact Jean Lockwood, manager of affiliate relations: Jean@IECAonline.com



IECA Associate members Alexandra Ince and Rebekah Jordan (CT) and Student member Kate Rutledge (IL), photographed here with Justina Trova and Margo Cardner of Buxton School and others, enjoyed a Tour of the Berkshires (Buxton School, Darrow School, Miss Hall's School, and Bard Academy/Bard College at Simon's Rock) in fall 2021.



Program Highlight: Trinity Academy of Hartford

"In September 2020, the IECA Foundation provided Trinity Academy with a \$5,000 grant to help fund our **Healthy Food Initiative Program**, which was started because of our belief in the need to develop the "whole" child. This program provides breakfast, lunch, and healthy snacks to all 40 of our students as well as our teachers daily—without any federal or state funding. Given our student demographic, 100 percent from under-resourced homes and from minority as well as refugee backgrounds, this program is a vital part of our school's mission. We have a full commercial kitchen with a part-time cook, which allows us to provide nutritious choices such as fruits and vegetables and whole grain breads. Without proper nutrition,



a student is not easily able to grow well academically, physically, and emotionally. Our students, given the proper resources, will hopefully go on to be successful students, finish college, and pursue financially



rewarding and stable careers in the long term. This will allow them to become self-sufficient and self-sustaining members of society. During the current COVID-19 crisis, funding from this program has allowed us to continue to feed our students by providing grocery store gift cards to our students' families on a regular basis."

—Donna Colliton, Executive Director

Announcing our 2021 Grant Winners!

Congratulations to the following organizations who received a grant from the IECA Foundation in 2021:

Mid-Columbia Reading Foundation
Trinity Academy of Hartford
Serviam Girls Academy
The Leaders Readers Network
Take Stock in Children
The Bay Area Technology School
Apparo Academy
Gold Coast Down Syndrome Organization
FXB Climate Advocates
Abramson Scholarship Foundation
CITYarts
Father's Purpose
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Horizons at Sacred Heart University
Kids On Point
LivingWorks
Missoula Writing Collaborative
Rosati Leadership Academy
Sisters Circle
UpSpring



Regional Groups

Connect with your colleagues living in your geographic area! IECA's member-led Regional Groups offer collegiality, communication, and personal interaction among local professionals. We currently have over 40 Regional Groups and new members are always welcome!

To join an existing group, visit the Member Network: [network.
iecaonline.com/communities/regionalgroups](http://network.iecaonline.com/communities/regionalgroups)

Don't see a Regional Group in your area? Start one today! Contact IECA Manager of Member Outreach and Engagement Trish Fratarcangelo: Trish@IECAonline.com

Broward/Palm Beach, Florida

This Regional Group had a Zoom get-together on September 28 to reconvene after the summer and share information and inspiration from the recent NACAC Conference. Contact: Susan Groden (sgrodenccs@gmail.com)

Connecticut

The CT Regional Group met virtually with Karen Kristof, assistant VP and dean of admission at Colorado College, on October 13. Contact: Stephanie Klein Wassink (skw@winningapplications.com)

Indiana

On September 15, the IN Regional Group met with the VP of enrollment management for Sweet Briar College. Typically, the group meets the second Tuesday of each month. Contact: Amy McVeigh (smartcollegeselection@gmail.com)

Massachusetts/New Hampshire/Maine

This group restarted its "Lunch and Learn" program with an October 10 session on understanding the differences between liberal arts colleges and career-focused colleges, featuring the New England admissions rep for Champlain College, Cody Campbell. The November 3 session will focus on theater, film, and dramatic writing programs with a presentation by Chris Andersson of Nothing But Drama. Contact Marie Lucca (marie@crimsoned.com) and Adela Penagos (apenagos@futuroenlightened.com)

New Jersey (Statewide)

The NJ Regional Group kicked off its fall season with the September 14 meeting, "One Great Idea to Prepare for the Application Season," and a September 30 session about Case Western Reserve University. Contact: Hilde Steiner (hildie@highfivecollegeprep.com) and Shari Powell (creatingcollegeoptions@gmail.com)

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Introductions

Please Welcome IECA's New Professional Members



Tracy Coffin (TX) has been an IEC for six years and was an Associate member. She specializes in helping neurodiverse students nationwide navigate the college admissions process.

Coffin graduated cum laude with a BA in journalism from Colorado Western State University and holds a College Admissions Counseling Certificate from UCLA Extension. An attendee of the 2016 IECA Summer Training Institute, Coffin is a member of LDA, IDA, CHADD, NACAC, and TACA. She has served as an SXSWEDU Advisory Board member since 2018.

Tracy Coffin
504U
Austin, TX 78759
512-771-9534
tracy@504U.org
504U.org
Specialty: C+LD



Elizabeth (Liz) Cooper has been an IECA member since 2019, when she joined as an Associate member. She currently chairs the IECA LD/ND Committee and co-chairs MILD, a group of MA-based IECs focused on students with learning differences.

Cooper earned a JD from Boston University and a BA from Brandeis University as well as an IEC Certificate from UC Irvine Extension. She attended the 2019 IECA Summer Training Institute and is a former practicing bankruptcy attorney.

Elizabeth (Liz) Cooper, JD
College Consulting Collaborative
Lexington, MA 02421
781-249-3826
liz@collegeld.com
collegeld.com
Specialty: C+LD



Louise Franklin (WA) has been an IEC for six years and was an Associate member.

Franklin attended the 2015 IECA Summer Training Institute and has served on the IECA College Committee as chair of the Tours Subcommittee. She volunteers with the nonprofit organizations ScholarMatch and The Space Idaho.

Franklin is a member of the PNACAC and Seattle Area College Consultants (SACC). She holds a JD from Stanford University, a BA in human biology, and a Certificate in College Counseling from UCLA Extension.

Louise Franklin, JD
Confluence College Counseling
Seattle, WA 98109
206-849-3012
confluencecollegecounseling@gmail.com
confluencecollegecounseling.com
Specialty: C



Jenny Suyeon Han (Korea) has been an IEC for 11 years. Formerly she worked as the GVCS career/apptitude counselor at Yongin Foreign Language High School;

career planner at Incheon Metropolitan Office of Education; and career/apptitude consultant of ACT International Special Program at Hanyang University.

Han studied education as an undergraduate student and received a master's degree in counseling psychology.

Jenny Suyeon Han
Primestone Consulting
Seoul, Gangnam-gu 06026
South Korea
(+82) 10-6865-8318
jhan.primestone@gmail.com
primestone.co.kr
Specialty: C



Nancy Ikenberry (CO) has been an IEC for three years and was an Associate member. Previously, she worked for ExxonMobil in Houston, TX and the global education provider Campus Brasil.

Ikenberry earned an MBA and a BS in finance from the University of Illinois Urbana-Champaign and a Certificate in College Counseling, with distinction, from UCLA Extension. She attended the 2018 IECA Summer Training Institute and is a member of NACAC, RMACAC, and College Consultants of Colorado.

Nancy Ikenberry, MBA
Brightline Admissions
Boulder, CO 80301
720-328-8486
nancy@brightlineadmissions.com
brightlineadmissions.com
Specialty: C



Laura Ferdinandi Mahoney (CA) has been an IEC for 22 years and was an Associate member. During her career, she has worked as a speech and language pathologist, a resource specialist, a credentialed teacher, and as a college professor.

Mahoney holds master's degrees in communicative disorders and special education as well as credentials in K-8, RSP, and Mild Moderate. She is a member of NASET, ACCA, ASCA, NACAC, and AASEP, and is president of the philanthropic Candlelight Guild.

College Planning & Tutorial Center
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559-436-1233
laurafmahoneyslp@gmail.com
blueprint4college.com
Specialty: C+LD



David (Dave) Morris (WA), the founder of College Athletic Advisor, has been an IEC for two years and was an Associate member. He brings over two decades of experience coaching in NCAA Division I, II, and III as well as the NAIA and the NJCAA.

A graduate of the University of Michigan, with a master's degree from Frostburg (MD) State University, he has coached, taught, and served as an academic advisor and admissions recruiter for public colleges, private universities, and in nationally recognized high school and club programs.

David Morris, MEd
College Athletic Advisor
Tumwater, WA 98512
719-248-7994
dave@collegeathleticadvisor.com
collegeathleticadvisor.com
Specialty: C



Holly Ramsey (TX) has been an IEC for four years and was an Associate member. As a home educator for more than 20 years, she has led numerous local support groups and worked as an online writing teacher and mentor coach at Brave Writer.

An inaugural recipient of IECA's Making a Difference Award, Ramsey is the current chair of the IECA Homeschool Affinity Group. She served on the 2021 IECA Summer Training Institute faculty and is a member of TACAC.

Holly Ramsey, MA
Thoughtful Homeschooling
San Antonio, TX 78258
614-209-7001
thoughtfulhomeschooling@gmail.com
thoughtfulhomeschooling.com
Specialty: C



Lelaine Paik (IL) has been an IEC for seven years and was an Associate member. Previously, she worked as senior recruiter for an information technology staffing company and as assistant and acting director of admission and financial aid at the Northwestern Pritzker School of Law.

Paik earned her JD and BA from Northwestern University and her Certificate in College Counseling from UCLA Extension. She is a member of NACAC and volunteers her college counseling and resume writing services to US military men and women, and veterans.

Lelaine Paik, JD
LP Educational Consulting LLC
Winnetka, IL 60093
847-894-8475
lp@lelaine paik.com
lelaine paik.com
Specialty: C



Katharine (Kate) Sonnenberg (NJ) has been an IEC for three years and was an Associate member. Previously, she worked as an application reader at Princeton University; a law professor at the David A. Clarke School of Law; and an English instructor at the National University of Singapore.

Sonnenberg earned a JD from Columbia University and an AB from Princeton University. She attended the 2020 IECA Summer Training Institute, is a member of NACAC and NCAG, and chairs the Princeton Alumni Schools Committee of northern NJ.

Katharine (Kate) Sonnenberg, JD
KS College Success
Montclair, NJ 07042
973-509-2356
kate@kscollegesuccess.com
kscollegesuccess.com
Specialty: C



Carson Parker (IN) has been an IEC for two years and was an Associate member. She began her career as a case manager working with individuals and families affected by mental health and addiction issues. She moved on to become a clinical liaison with Aspen Education Group and then Midwest regional manager at American Addiction Centers before opening her IEC practice in 2019.

Parker is a member of the National Charity League and sits on the board of the Primary Care Psychiatry Foundation.

Carson Parker
Carson Parker Consulting
Westfield, IN 46074
317-289-1784
carsonparkerconsult@gmail.com
carsonparkerconsulting.com
Specialty: T+LD



Nancy Jou-Hua Wu (MA) has been an IEC for six years and was an Associate member. After working as an educational consultant at a larger institution for five years, she

decided to work independently in order to focus on a smaller number of families. She enjoys having more time to spend with her students to help them identify their best-fit schools, and to help them find and achieve their goals.

Wu holds an MBA in finance as well as a Certificate in College Counseling from UCLA Extension.

Nancy Wu, MBA
Medford, MA 02155
626-756-0589
nancy.wu1023@outlook.com
Specialty: C, S

In the News



◀ **Laurie Kopp Weingarten** (NJ) was featured on the fall 2021 issue cover of *Next Step U*, which included her article, “Dos and Don’t of Hiring Independent Counselors.” She was also quoted in “Should You Pay to Help Your Child Get Into an Elite College?” on Yahoo on August 10; “How to Get Into a Magnet School” in *US News & World Report* on September 21; “21 Places Worth Seeing on College Tours” in *US News & World Report* on July 8;

“Returning to School: Advice for Helping Teens Adjust to In-Person Learning” in *Your Teen* magazine; and “10 Ways to Calm Your Pre-College Nerves” on Her Campus.

Jeff Levy (CA) was quoted in “Will That College Degree Pay Off?” published in the *New York Times* on August 13 and subsequently in the *Seattle Times* on August 22. He was also quoted in “These college majors have the best return on investment, according to a new report,” on CNBC.com on August 19.

Kristina Dooley (OH) was quoted in “College Tuition Insurance Gains Attention in Pandemic” in the *New York Times* on August 6.

Jane Klemmer (NY) was quoted in “Should You Buy College Tuition Insurance?” in *Consumer Reports* on August 30.

Ethan Sawyer (CA) and **Stephanie Klein Wassink** (CT) were quoted in “How to Write a College Essay” in *US News & World Report* on August 3.

Anjanita Mahadoo (CA) was quoted in “How International Students Can Benefit From a Small-Town College” in *US News & World Report* on September 22.

Joan Koven (PA) was quoted in “The Delta Variant is Driving Up Demand for College Tuition Insurance” in *Money* on August 20.

Diana Blitz (DC), **Carolyn Pippen** (Associate, TN), and **Judi Robinovitz** (FL) were quoted in “Where Will Students Apply?” in *Inside Higher Ed* on August 9.

IECA was mentioned in “Getting Your Child Into the Right School: Should You Hire a College Admissions Counselor?” on Medscape on September 1.

Nagla Orlando (CA) was quoted in “Canceled college entrance exams create issues for students, families” on KSBY San Luis Obispo News online on July 26.

Rebekah Elmore (MA) was interviewed on the Podcast Business News Network on August 23. 🎧

Initiatives

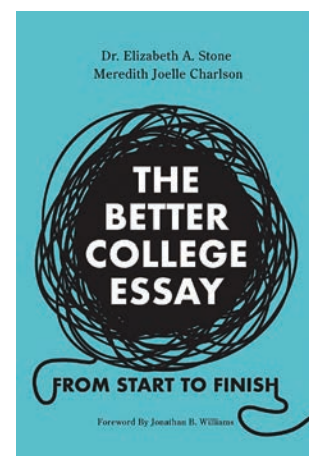
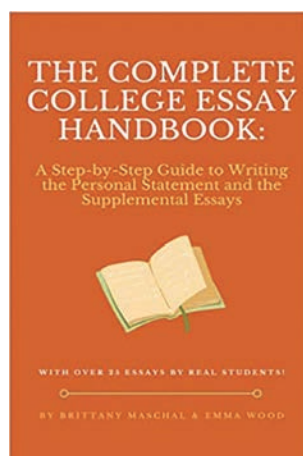
Yvonne Espinoza (TX) has been honored with NACAC’s 2021 Inclusion, Access, and Success Award. The award, which was established in 1984, honors individuals who have been instrumental in making postsecondary education opportunities available to historically underrepresented students.

For the third year in a row, **Terry Mady-Grove’s** (NY) practice, Charted University Consultants, LLC, was awarded the Best Women Owned Business on Long Island by *Long Island Business News*.

The College Parent Survival Network—an initiative led by **Joanna Lilley** (MI) and **Adrienne Frumberg** (CT)—is an online survival network for parents of college-bound, current, and former college students. This is a private community of parents seeking advice under the guise of discretion and looking for answers to better help their young adults navigate college-related and transition hurdles.

The Complete College Essay Handbook, written by **Brittany Maschal** (Associate, NY) and Emma Wood, was published in July 2021.

The Better College Essay: From Start to Finish (City Limits Publishing), written by **Elizabeth Stone** (CA) and Meredith Joelle Charlson, with a foreword by Jonathan B. Williams, was published in May 2021. ▼



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Block out your calendar now and plan to join us online for IECA's annual Professional Member Retreat, specifically designed to address the needs of members with at least five years of experience in the profession. The presentations and guest speakers are appropriate and valuable for IECs practicing in all specialty areas. Share your best ideas with colleagues, engage in group discussion, and learn from topic-focused presentations. Start the new year inspired and invigorated! Learn more and register online: link.iecaonline.com/retreat

IECA's Career Center

Did you know there are more than **7,700 job listings** representing over **1,300 employers** on IECA's Career Center right now? Whether you are looking for a new opportunity for yourself or to find talent for your company, make the Career Center work for you.

An IECA member is selling their practice and would prefer to sell it to an IECA colleague. If you're interested in this opportunity, visit the Career Center and search "IEC" for more information: link.iecaonline.com/careers



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INSIGHTS

Member-to-Member

THE JOURNAL OF THE INDEPENDENT EDUCATIONAL CONSULTANTS ASSOCIATION

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Setting boundaries with your clients

Member Resource Spotlight

Peer-to-Peer Resources

An exclusive member benefit, the Peer-to-Peer Resources section of the IECA website (link.iecaonline.com/peer-to-peer) includes a wealth of content submitted by IECA members and organized by specialty areas. A few highlights include:

- 40+ Ways Counselors Can Help Bring More Equity to the College Admission Process
- Helping Families Determine College Affordability in Five Steps
- Information and Best Practices for Homeschooling and Homeschooled College Applicants
- College Equity Index
- Roadmap for Training: Working with Students Who Learn Differently

Do you have a recommendation for a resource to add? Send your submission to the appropriate IECA committee chair (link.iecaonline.com/leadership).



In Memoriam

Faith Howland, one of IECA's treasured founders, was a brilliant independent educational consultant who made an enormous difference in the lives of both students and IECs. As head of the educational consulting firm of Howland and Spence, she advised a range of students and was an expert in the use of psychometrics in identifying learning challenges.

Faith was an active member of IECA for 40 years, from its founding in 1976 until she retired and became an Emeritus member in 2016. Lloyd Paradiso writes:

"The first gathering of what was to become the Independent Educational Consultants Association was held in 1973 in Boston's Back Bay at the home of Bob Parson. Faith was Bob's young, steadfast, brilliant colleague, who brought us together to explore mutual interests and perhaps, if we found common ground and purpose, form an organization which would serve families seeking educational advice for their children. We launched as a formal association during the NAIS conference in Boston in 1976 with Faith as organizer, moderator, presenter, and spokesperson representing all 15-25 of us.

Although Faith would never publicly take the credit, it is because of her tireless efforts on our behalf, her remarkable network of colleagues, her insistence on the highest standards (always doing our best work both with schools and with families), and her steadfast devotion to ethical practice that we flourish today, more numerous, stronger, and more impactful than ever. Indeed, we as professionals, IECA as an organization, and her myriad clients are so fortunate to have been in her care are Faith's fitting, lasting legacy."

Messages for her family can be left in the online guestbook: link.iecaonline.com/Faith-Howland



How to Deepen Your Engagement with IECA

By Cyndi Bohlin, IECA Editor and Communications Associate

IECA has grown to become the largest organization representing independent educational consultants (IECs) in the world, with more than 2,300 members representing nearly every US state and more than 40 countries.

As our membership numbers continue to grow, so do the opportunities to connect with colleagues worldwide, gain skills, and demonstrate your commitment to the profession. The more you engage with IECA, the more you will benefit! Here are some strategies to help you deepen your participation—thereby benefiting your own practice *and* our Association.

Connect with colleagues to grow your network and boost your referrals.

Member Network

One of our most-cited member benefits is the IECA **Member Network** (network.iecaonline.com), an active hub of idea-sharing and collaboration. On a daily basis, members seek (and offer) advice on students' college and school lists, share information on news and trends impacting the profession, and much more.

By becoming active in the Member Network, you become better known and respected by your peers. This often leads to referrals from your IECA colleagues as they look for IECs with particular expertise and availability.

All IECA members are automatically added to the Member Network when they join the Association.

Mentor Match

If you are an experienced Professional or Associate member, volunteer to strength the IEC profession by becoming a mentor through our **Mentor Match** program. You choose the length of the mentorship, the method of communication, and the focus, among other aspects of the partnership. Mentoring is a rewarding activity and one that provides immense value to colleagues.

Or, if you are newer to the profession, sign up to be a mentee to gain targeted, one-on-one guidance. Benefit from support unique to your needs, whether it is counseling skills, K-12, business management, college knowledge, or otherwise.

You can find more details about the Mentor Match program on the Member Network: network.iecaonline.com

Virtual Roundtables & Member Groups

Our amazing corps of volunteers, working with our professional staff, continues to add ways to connect with colleagues according to your membership level, specialty areas, and interests. Join an upcoming live Zoom session to meet fellow IECs, share ideas and challenges, and seek advice. Upcoming and recurring roundtables include: an **Associate & Student Member Roundtable**; a recently launched **New Professional Member Roundtable**; **Gateway to Graduate School Consulting**; **LD/ND Roundtables**; weekly **Connect and Collaborate sessions with the Therapeutic Committee**; **DEI Book Club**; and more. Our dozens of **Affinity Groups** and **Regional Groups** provide other avenues to engage with colleagues with similar interests or with those living in your geographic region.



Look for details on upcoming meetups of all these groups in our weekly 5 Minute News email, distributed on Monday morning, and on the Upcoming Events page of the Member Network: network.iecaonline.com/events/calendar

Also, our nine committees of the membership often seek volunteers for short-term projects such as regional outreach to unaffiliated IECs, assistance in reviewing conference proposals, planning webinars, and more. Consider volunteering to help the committees with these and other initiatives. Reach out to the committee chairs found at link.iecaonline.com/leadership for details.

continued on page M4



2021-2022 Professional Membership Directory

The new Professional Members Directory will be mailed to all members in early December.

If you would like to have additional copies, use the Member Publication Order Form: link.iecaonline.com/marketing



Deepen Engagement, from page M3

Take part in IECA's educational and professional development opportunities.

A silver lining of the COVID-19 pandemic is how we have been able to pivot to numerous online learning opportunities readily available to members worldwide, many of which provide continuing education credits. We encourage you to take advantage of:

- Free webinars, including **College Conversations**, **School Tours**, **Therapeutic Virtual Program Tours**, and more—all recorded and made available afterwards in IECA's webinar archives if you can't join live: link.iecaonline.com/webinar-archives
- Our **2021 Virtual Fall Conference**, November 8-12, featuring dozens of educational sessions available for you to "attend" at your convenience and from the comfort of your own office or home: link.iecaonline.com/Conference-IECs
- The opportunity to **present an educational session at our upcoming Spring Conference** (proposals due by December 1, 2021), May 16-18 in Philadelphia, PA
- The IECA **Virtual Professional Member Retreat** (January 20-21, 2022), open to all Professional members and particularly focused on the needs of members with five or more years of experience in the profession: link.iecaonline.com/retreat
- The five-day IECA **Summer Training Institute**, designed for newer IECs or those considering becoming an IEC. This program provides a wealth of knowledge to help you set your IEC business up for success: link.iecaonline.com/si

In addition to these webinars and virtual presentations, be sure to check out the extensive **Peer-to-Peer Resources** on the IECA website, featuring valuable submissions from IECA members on a variety of topics: link.iecaonline.com/peer-to-peer

And, if you are expanding your IEC business or seeking a new professional opportunity, look no further than IECA's **Career Center**, featuring hundreds of listings for job seekers and posters: link.iecaonline.com/careers

Gain the skills and tools to help your IEC business thrive.

You may be an "independent" educational consultant, but you don't have to go it alone! Let IECA and your fellow members help you learn and keep up with the key components integral to developing and operating a successful IEC business.

- IECA's **Business Training Videos** guide you through accounting systems, project management systems, Evernote, and other business tools and methods in short videos made by IECA Business Practices Committee members: link.iecaonline.com/business-training-videos
- The **IECA Business Roundtable**, held the second Friday of each month, provides a forum for all interested IECA members to join a discussion centered on one aspect of the business of being an IEC. Topics vary each month. Share your business ideas and hear what has worked (and not worked) for your colleagues!
- IECA has **marketing materials** to help you provide professional and vetted content to your clients without an added cost to you. The materials can be made available as links to add to your website or hard copies to distribute to your students and families. Topics include college affordability, college visit tips, boarding school myths, and more: link.iecaonline.com/marketing
- Membership in IECA includes **numerous benefits** to support your practice, including discounts on UC Extension courses, discounted business management tools, reduced prices on publications, and peer support programs—and more are continuing to be added! link.iecaonline.com/member-benefits

We hope these ideas for ways to connect with colleagues, further the profession, and continue your growth as an IEC will inspire you for the year ahead. 🚶

Cyndi Bohlin can be reached at Insights@IECAonline.com



Creating Your IEC Business: Moving from Dream to Reality

Adapted from a 2021 IECA Summer Training Institute session of the same name, presented by Katelyn Klapper, IECA (MA). For information about the 2022 Institute, visit: link.iecaonline.com/si

Congratulations! You've decided to pursue a career as an independent educational consultant (IEC). You're ready to enjoy the benefits of being your own boss—embracing the flexibility, personalization, and greater control over your time, income, and definition of success—while making a lasting impact on the lives of students and families.

Whether this is your first or fourth entrepreneurial venture, these considerations will ensure your success as you move your small business from dream to reality.

Identify your customers and their needs. Who do you want to work with? Who is a good fit for your style, services, and skills? Embrace the things you do well. We can't be all things to all people! Build a professional referral network and think about what you will refer out.

Use the intake process as an opportunity to gather information about your clients' needs. ("What has prompted you to call? What are your family's primary needs?") Put yourself in their shoes. Listen to your initial inquiries before jumping in to describe your services. The way you address inquiry needs will help to qualify your best client fit.

Consider: what do YOU want to do most? What is your specialty? Consider your personal experience and what gets you excited, whether it's working with student-athletes, STEM, gap year expertise, therapeutic, international, or otherwise.

Develop your IEC "product." Reflecting on your experience and knowledge base, think through what you want to provide. Is it college knowledge, writing skills, financial aid, or something else?

Design your service plan. How do you want to work? Do you want to offer a comprehensive package or hourly services? Will you focus on one-on-one counseling only or lead group webinars and boot camps? Consider specialty add-ons like essay or affordability planning.

After you have built your service plan, streamline your language in order to present your service in a concise and yet comprehensive overview. You can still convey that your work is highly personalized, but this visualization will help you to also build a consistent internal process.



Build your process. Having a process in place from day one allows you to work more competently and confidently. Systems build consistent contact and content as you move from the inquiry process through intake, billing, meetings, global communications/newsletters, and checklists.

Develop your resources. Create your client forms and materials and consider when to make use of web-based client management tools. You will find the additional capital and operating expenses well worth it after taking on your fourth or fifth client. Join relevant membership organizations and develop your small networks of support.



*Katelyn Klapper,
College Options,
can be reached at
collegeoptions@comcast.net*

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Determine your prices. Start with your income goal and understand your client capacity. Develop options that will give you the most flexibility so you can change them when you are ready. Reference rates in your area so you can determine market pricing. Value yourself and your professional service!


If offering comprehensive packages, set clear limits even if your time is “unlimited.” When does the service end? Packages can be built with timelines and milestones. Alternatively, if offering hourly service, consider bundled blocks of time.

Don't forget about other pricing considerations.

Don't forget about other pricing considerations. Will you work with friends? If so, will you offer a discount? What is your comfort level and where will you draw the line between your personal and professional life?

Think about taking on pro bono work (as a change of pace, I like to work with local CBOs). It's good for you, helping to balance your practice and develop your skill sets, and good for the profession!

Consider where and how you will work. Will you meet with clients in person, virtually, or in a hybrid of the two? Do you intend to have a solo practice or do you want to grow (or join) a team? Consider the training and management a team involves as well as the specialties, skills, and personalities it offers.

Finally, as you move forward, think about what is—or will be—your biggest obstacle. What IECA resources can you use to overcome this challenge? 

How IECA Can Help You in Your Journey

IECA Summer Training Institute

This five-day Institute is designed for newer educational consultants and for those who are considering becoming an IEC. Whether you are just beginning to think about joining the profession or have been in business for a year or two and seeing clients on a limited basis, the IECA Summer Institute will help to set you up for success as you learn more about managing and promoting a business, working effectively with students and families, building a knowledge of the wide range of options available to students, and establishing a professional, competent, and ethical practice.

Information about the 2022 Institute will be posted on the IECA website (link.iecaonline.com/si) in early 2022.

IECA Virtual Professional Member Retreat

January 20-21, 2022

IECA's annual Professional Member Retreat is held each winter and will be virtual this year. Attendance is limited to IECA Professional members and is particularly focused on the needs of members with at least five years of experience in the profession. The presentations and guest speakers are appropriate and valuable for those practicing in all specialty areas. The focus of the retreat is sharing, group discussion, and special focused presentations. The One Great Idea session involves all participants as they share the best ideas, resources, and tips that help them run their practices.

For more information and to register for the 2022 Retreat, visit: [link. iecaonline.com/retreat](http://link.iecaonline.com/retreat)

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To File or Not to File, That is the Question

By Lynne Bossart, IECA (CT)

While not typically an existential matter, whether to apply for financial aid could be one of the biggest decisions a family makes. After all, a college education is a huge investment, and as IECs, it is incumbent upon us to educate our families about college affordability so that they can make an informed decision.

It's important to begin any discussion about financial aid by having the family determine their EFC (Expected Family Contribution), soon to be known as the SAI (Student Aid Index), and what their plans are for paying for college. I like to

meet early on with parents of a new student after they have completed the College Board's EFC calculator (link.iecaonline.com/EFC-calculator).

That way I can begin building a good-fit college list. One of the best resources we as IECs have for parents is the IECA's Subcommittee on College Affordability

(SOCA) flow chart, *A Step-by-Step Process on How to Pay for College*, lovingly known as the *Five Steps* (link.iecaonline.com/five-steps). This is one of two important handouts I give to families at this initial college affordability meeting.

I'm guessing that, like me, many of you have heard the following from more than one of your families.

1. We won't qualify for financial aid.

What is financial aid? According to the US government, it is the family's responsibility to pay for college *up to its ability*. Beyond

that, federal financial aid exists in the form of grants, work-study and, yes, loans, subsidized and/or unsubsidized. Enter the Free Application for Federal Student Aid (FAFSA), which uses the federal methodology (FM) to calculate need-based aid (studentaid.gov/h/apply-for-aid/FAFSA).

Additionally, over 150 undergraduate colleges use the College Board's CSS Profile to determine institutional need-based aid, and therefore use an institutional methodology (IM). The College Board's EFC Calculator calculates the EFC using

both the FM and IM. A student must file the FAFSA with all colleges they are applying to, regardless of whether they are applying to schools requiring the Profile. Both the FAFSA and the Profile are available every October 1 for the college year beginning the following fall.

The second

important document I give to families is Federal Student Aid's annual *Federal Student Aid at a Glance* (link.iecaonline.com/aid-glance).

With the Cost of Attendance (COA) at some colleges approaching \$80,000, many families are surprised to learn that they might indeed have financial need. How is financial need defined?

COA-EFC = Financial Need. This means that families will need to pay at least their EFC at any college; the difference between their EFC and the college's sticker price is the family's demonstrated financial need.



Lynne Bossart, Dobler College Consulting, LLC, can be reached at lynne@doblercollegeconsulting.com



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However, not every college will meet 100 percent of a student's financial need. In fact, most don't. Once the family has determined their need, the next step is to talk about how well colleges will meet that need, and what that means. I *always and often* consult the *Domestic Undergraduate Need-Based and Merit Aid* table (bigjeducationalconsulting.com/resources) by IECA members and financial aid gurus Jeff Levy (CA) and Jennie Kent (Colombia), which they compile and generously share annually with the IEC community. This resource goes a long way in helping us explain to families financial fit.

2. We'll have to take out private loans.

While families may or may not borrow for college, they need to understand what types of loans exist. Federal student and parent loans are available to all families as long as they file the Free Application for Federal Student Aid (FAFSA). Because I am not a financial advisor, I don't counsel families about private loans or other loan options, I do, however, recommend that they speak to their trusted financial advisor or, if they don't have one, I will offer to give them some recommendations.

3. My (non-recruited) child's athletic ability will help them get money for college.

While only two percent of students will receive scholarships to play sports in college, the likelihood of a student who has not been recruited receiving a scholarship from a D1 or D2 school is highly unlikely.

Another important consideration is that aid awards are determined by which parent is indicated when filing the FAFSA. Don't forget that the FAFSA is the *student's* application. I like Federal Student Aid's infographic, *Who's My Parent When I Fill Out the FAFSA?* (link.iecaonline.com/parent-FAFSA) This rule remains valid through the 2022-2023 school year and possibly 2023-2024, but with the simplified FAFSA rules that were to take effect for the 2023-2024 school year, some of which have been delayed, we're still not sure which ones will go into effect next year. Currently, for divorced or separated families the parent with whom the student has lived more than 50 percent of the year would be the parent to use. The new rules state that it is the parent who gives the most financial support will need to report their financial information, regardless of where the student lives. If you are working with low-income families, it helps to be well-versed in the nuances of financial aid. FSA's *Financial Aid Toolkit for Counselors* (link.iecaonline.com/financial-aid-toolkit) is a must for your toolbox. There are many resources here that you will find useful.

Another subject we should discuss with our families is merit aid. Merit aid is scholarship money which does not need to be repaid and is based on a student's merit, heavily weighted on academics and, in a non-test optional world, SAT/ACT test scores. Looking again at Jeff and Jennie's chart (and, yes, I'm fangirling), you will notice that the more selective the college, the more need it meets. Conversely, the higher percentage of need met often means the college offers little to no merit aid. Students who are counting on some financial assistance should be thinking about

colleges that offer merit aid, even if they've never heard of those schools, which, as you all know, is often a difficult conversation. Please note that some schools require that the student files a FAFSA to receive merit aid.

However, not every college will meet 100 percent of a student's financial need. In fact, most don't. Once the family has determined their need, the next step is to talk about how well colleges will meet that need, and what that means.

Should we encourage all families to file a FAFSA even if they are full-pay? As an IEC you may want to encourage families to fill out the FAFSA regardless of their ability to pay for the following reasons. For instance, in times of tragedy (loss of a parent), job loss, flood, fire, pandemic, a family can't appeal an award if they haven't already applied for financial aid. If the last 18 months have shown us anything, it is to be prepared. Also, some families would like their child to have some "skin in the game," so taking out a federal student loan could be a good option; taking this loan will also help the student to establish a credit history.

Once you've explained all of the options to your families, they should be able to make an informed decision about whether or not to apply for financial aid. 🙏

What is the Subcommittee on College Affordability?

Initially founded by a small group of IECs and for many years headed by **Lora Block** (VT), SOCA's mission is to educate our members about the ever-changing rules, regulations, and practices of college financial aid and to improve their expertise in advising their families how to find college choices that meet the family budget. You will find many detailed articles about financial aid and college affordability written by current and former SOCA members in the Peer-to-Peer Resources section (link.iecaonline.com/peer-to-peer) of the IECA website (under College Specialty), and in previous issues of IECA's *Member-to-Member Insights* (link.iecaonline.com/insights-members).

SOCA will be offering both a pre-conference workshop and a breakout session at the IECA 2021 Virtual Fall Conference (link.iecaonline.com/upcoming-conference). We encourage you to attend to gain a better understanding of how best to help your families understand college financial fit.



Strategic Planning: Good for Our Association and Our Businesses

By Brooke Daly, IECA (NC), Chair, Business Practices Committee

It is hard to imagine anything I enjoy more than the start of a new year, a fresh annual planner in hand and ready to dream about what my team and I can achieve together. With 2022 waiting around the corner, now is an excellent time to plan a strategic planning meeting, either by yourself if you're a sole proprietor or with your team.

Whether you want to refresh your planning process or need clear direction to get started, I'm hopeful this article will provide the right inspiration to make the next year a great one.

Let's start with the end in mind. Why do you need a strategic plan?

1. **Design your roadmap.** Have you ever gotten to the end of the workday, and you wonder, "What did I accomplish today, besides answering or reading email?" Your strategic plan will help you focus on what's important. A strategic plan will give you clear goals and direction, so when you plan the work you do, even daily, it will align with your goals.
2. **Create team alignment.** Employees who participate in the strategic planning process will have more buy-in to the bigger picture and the type of business you want to create. They'll understand what's most important and what kind of impact they'll have with their actions. Decision-making becomes easier for all team members because everyone knows the desired end goals.
3. **Increase productivity and decrease uncertainty.** For many reasons, 2020 was a rough year, and my team yearned for a sense of normalcy. Having a strategic plan gave us common goals to focus on. As the saying goes, "Action cures fear." Regardless of what was happening in the world, we kept moving in the direction we set through our strategic plan, which ultimately provided a sense of purpose and job satisfaction.
4. **Create excitement in your business!** One of the best parts of the planning process is that you and your team can celebrate successes. Achieving each goal, no matter the size, can be celebrated. Our team thrives when acknowledging each other for a job well done, contributing to a positive, upbeat culture.

Now that you have an idea of how you can benefit from a strategic plan, how should you begin?

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Brooke Daly,
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What steps should you take next to create a strategic plan?

Start with a detailed vision of what you want your business to look like three years now. Don't be afraid to dream big! What would you be proud to create? Starting the strategic planning process with your vision will help you uncover your priorities and reveal what matters most in your work. Don't worry about how you'll make the vision a reality. Inspire yourself, your family, and your team!



In your vision, include details like:

- What is our brand known for?
- What positions will exist on my team?
- What will clients (both parents and students) write in their testimonials? In other words, what are we known for, and what are we good at?
- How many locations will we open? And how many students will we work with?
- What will we be celebrating?
- What does our office space look like?
- How will we see our core values being realized?
- What will our professional development consist of?
- What will be the key elements of our team culture? How do we interact with each other?
- How will we serve our community and underserved/disadvantaged students?
- What will school counselors say about us?

Once you've drafted your vision, it is time to share it with your team and schedule a strategic planning meeting. Here are typical components of a strategic planning process:

1. **Establish a vision statement.** Taking what you created in your visioning exercise, write a short statement about the idealistic future of your business. What would you ultimately like to achieve in your business? What do you want to be known for? Your vision statement, just like your larger vision, should inspire your current team and, if you're expanding your business, be a lure to attract other IECs to work with you!

2. **Create a mission statement.** This is a short statement that explains why your business exists and what your purpose is. It should include what's most important to you in serving your clients (i.e., reducing family stress in the college planning process, finding good-fit colleges for students, etc.).
3. **Perform a SWOT analysis.** SWOT stands for strengths, weaknesses, opportunities, and threats. What does your business do well, and what can be improved? Where are the opportunities to serve your clients more effectively, and what possible external threats do you have? As a pre-meeting exercise, ask your team to do a SWOT analysis on their own. In the meeting, allow each team member to contribute and include all of their answers. Encourage candidness. My team has taught me a lot about where we can improve. Some of the best ideas have come from our SWOT analysis conversation.
4. **Establish measurable annual goals.** Most importantly, leave the strategic planning meeting with agreed-upon goals for the year. Review each goal and assign action items to each team member.
5. **Set a quarterly goal review meeting date.** Each quarter, meet with your team to review which goals have been accomplished—and celebrate! Review the annual goals and set quarterly goals for the next quarter.

Now that you have a strategic plan, how should you use it?

A strategic plan is a living document that should be reviewed each year, not shoved in a desk drawer—or a virtual file! Our team sets annual goals based on our strategic plan, and then we work backward to create our quarterly, monthly, and ultimately our weekly goals. It's worth noting that during application season and up until November 1, our collective weekly goal is to survive! Each quarter, we meet to revisit our strategic plan and align our goals for the next quarter.

You and your team will find it easier to prioritize and focus if you reference your agreed-upon goals.

When opportunities or challenges arise, use your strategic plan as a reliable and personalized litmus test. When you need to make a decision, test it against your strategic plan. Does your decision align with your goals? Is it something you should spend your time on? You and your team will find it easier to prioritize and focus if you reference your agreed-upon goals.

If you're anything like me, there will be times you'll get discouraged that your plan is not progressing the way you envisioned. Just like any big project, the path to success is not usually linear. When that happens, ask yourself, "What's one thing I can do today (or this week) to get one step closer to my goal?" Nine times out of ten, the action of taking a step will alleviate any sense of feeling overwhelmed or disappointed.

Wishing you a successful strategic planning process and a productive 2022! 🙌

Setting Boundaries in Your Practice

By Charlotte M. Klaar, PhD, CEP (SC)

I recently came across an article by James Michael Sama, "10 Signs You Have Healthy Emotional Boundaries: Setting Boundaries for Self-Love," that made me think about my own ability to maintain boundaries and how that has affected both the success and enjoyment of my work. In the past, I was one of those people who found it very difficult to say no to anyone, particularly when the request was for the good of an organization or person in whom I believed.

In retrospect, my lack of backbone had more to do with my need to feel worthwhile and accomplished than it did with the requests being made of me. There have been times when agreeing to do something was detrimental to my focus on my work simply because of the time it took to accomplish the task.

Sama tells us that the first rule is to value your own time and energy, followed closely by the second, which is to be comfortable saying no.



As businesspeople, we try to keep the needs of the client (our student) in the forefront of our minds. Unfortunately, these students come with parents for whom the perception of what is good for the student may be somewhat warped by their own needs and ambitions. Since the parents are the ones paying our fees, it makes it a bit difficult to tell them that what they believe to be true is hogwash and to continue doing what is best for the student. This difficulty is part of why they hire us. On some level, they know that they are not the best judge of the student's accomplishments and that the process is not what it was when life and college admissions was simpler.

A case in point: Recently, I received a note from a parent telling me that his daughter was "insulted" by the preliminary list of colleges that I had developed in response to my interview with her and an in-depth examination of her transcript. The family has studiously avoided providing me with her PSAT results and would not tell me which colleges were "recruiting" her to play a sport. The rationale was that they did not want to sway my thinking and

wanted a strictly academic view of fit and match for her. The alarm bells were ringing loudly! By the way, did I mention that the student has ADHD, executive functioning issues, and difficulty in other areas of learning? The dad pointed out to me that they had spent a considerable amount of money on her education at a very fancy private school and had saved an even more considerable amount to pay for her future educational endeavors.

I had two choices: to apologize for my "misunderstanding" of her worth or to stand up for my professional self and point out what was wrong with this picture and risk losing the client. I decided on the latter course and told the dad:

"Unfortunately, no matter how much money has been spent on her education or how much you have saved to pay for it, the fact remains that you have a determined, talented, and friendly young woman who deserves to find the college life that will be all she hopes for it to be. That includes the availability of supports to help her manage her time and lessen the effect of her learning issues, particularly if she is also playing a sport."

Attached to the message was a list of what I needed to properly do the work for which I had been hired and the implicit message that without that autonomy I was out. Should I have been stronger before providing the list without full disclosure? Absolutely! But by making my

continued on page M12

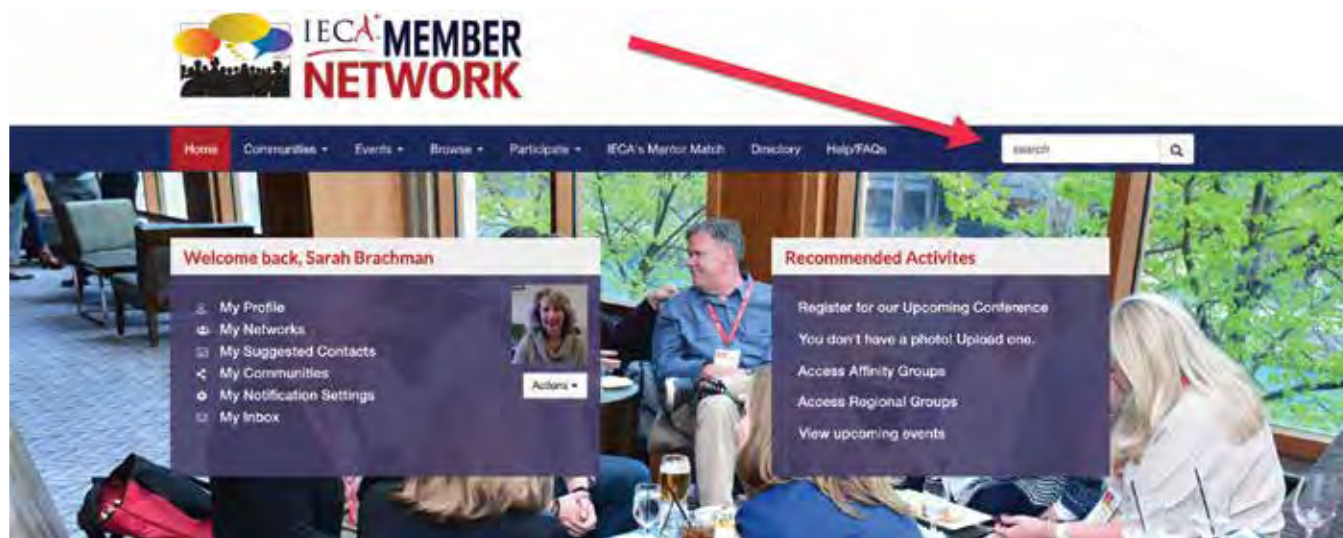


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How to Search for a Past Discussion or File on the Member Network

Are you wondering if any other IECA members have inquired about math tutors? Want to see the latest discussion among fellow members about test-optional policies? Curious what the DEI Book Club's last featured title was? The search function of the Member Network is here to help!

On every page of the Member Network (network.iecaonline.com), you will find a search box in the blue navigation bar. Use this function to conduct a search on a specific topic across all sections of the Member Network—discussions, events, and attachments that have been saved in the libraries.



Setting Boundaries, from page M11

boundaries clear, I was able to continue working according to my standards *and* maintain the client relationship.

Setting boundaries in our practices is no easier than setting boundaries in our lives. One of the items in Sama's list that resonated with me was: **You end toxic relationships.** The situation above may be such a relationship unless I can salvage it for the good of the student. When we are hired, we must project and maintain our position as the expert. If we don't have an answer to a question, we have an entire cadre of support in our professional associations and colleagues. I never hesitate to tell a parent if I don't know something, but I always add that I will find out and get the response to them in a specified time. No one knows everything. The fact that we have resources from whom to get the answers establishes our credibility and professionalism.

So, what are the benchmarks to setting boundaries in your practice?

1. *You do not allow anyone to abuse you!* There is no "unlimited" access to you. You have working hours and procedures that you maintain. If you don't work on Sunday, for example, don't return emails or answer the phone on Sunday!

2. *You have a healthy respect for yourself.* If you are being asked to do more than that which is included in your contract, smile and point out that the request is out of the scope of your services. You can also mention how it can become part of the service if there is an option to do so.
3. *Your boundaries extend to your own family.* Because so many of us work from a home office, our families and friends think that we can drop everything to attend to their needs. You must ensure that your spouse and children understand that you are working and while doing so their needs must be put on hold unless someone is bleeding.
4. *You have a clear contract for the services you will and will not provide.* This is crucial to the success of your business. Clear delineation in simple language that describes each of your service offerings coupled with disclaimers. For example, from my contract: "Dr. Klaar's responsibility to this agreement **DOES NOT** include completing or filing of applications, or financial forms."
5. *You make time for yourself!* As Sama says, "Your mental and emotional needs are just as important as everyone else's—and what's more—if you don't maintain your own well-being, you'll never be able to support anyone else's." 🧘



Boulder Creek Academy

Empowers Students

Academic Curriculum

Boulder Creek Academy offers teacher-led individualized learning through fully accredited elective and core class curriculum.

Therapeutic Treatment

Our approach to treatment helps students develop a well-rounded sense of self and create and sustain healthy relationships while addressing their individual clinical needs.

Student Profile

A typical Boulder Creek Academy student is 13 to 18 years of age who is bright, capable, neurodiverse, exhibiting school avoidance/refusal, and has difficulty sustaining relationships.

Animal Therapy

At Boulder Creek Academy, animals are a unique part of an educational and therapeutic strategy that helps our students develop important social and emotional skills as they care for and bond with the animals.

Extracurricular Adventures

Students are given opportunities to engage in fun, challenging adventures such as kayaking and rock climbing to help build self-esteem, discover new strengths and enjoy the company of friends and family.

Our Campus

Boulder Creek Academy is situated on 119 acres at the base of the beautiful Cabinet Mountains. Our campus provides a serene setting for studying, socializing and engaging in hobbies.

BOULDER CREEK
ACADEMY

BOULDER CREEK ACADEMY
EMPOWERS STUDENTS



BOULDER CREEK
ACADEMY

Admissions to Boulder Creek Academy

Parents of troubled adolescent girls and boys often feel like they are struggling alone and without options. Often, they are surprised when they talk to us because they realize they are not alone and options are readily available.

Please contact us to learn more about how Boulder Creek Academy's therapeutic boarding school can help your child. We welcome the opportunity to talk with you about your child and explain how we can help.



“ Sending our son to a therapeutic boarding school was not an easy decision to make, but the staff at Boulder Creek Academy were caring and nurturing and their communication was excellent. The teachers answered our emails the same day and the nurse was great as well. They were compassionate, caring, respectful and the best role models for these young teens. **Boulder Creek Academy was the best choice we could have made.** ”

Here's How You Can Reach Us

Monday through Friday | 8:00 a.m. to 5:00 p.m. (PST)
877-348-0848 or 208-267-7522

After Hours and Weekends | 208-946-0853

BOULDER CREEK
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For language assistance, disability accommodations and the non-discrimination notice, visit our website. Physicians are on the medical staff of Boulder Creek Academy, but, with limited exceptions, are independent practitioners who are not employees or agents of Boulder Creek Academy. The facility shall not be liable for actions or treatments provided by physicians. 211676-2683 9/21