

## Chapter 1

# Your Higher Calling

*Busy lifestyles have spawned them. More than 4,100 institutions of higher learning have made them possible. Nearly 16 million students have created a demand for them. And now you can take advantage of today's ever-growing need for college admissions/financial aid consulting services by throwing your hat—or shall we say mortarboard?—into this interesting and rewarding arena.*

Today's college planning consultants—used interchangeably in this book with educational consultants or college admissions/financial aid consulting

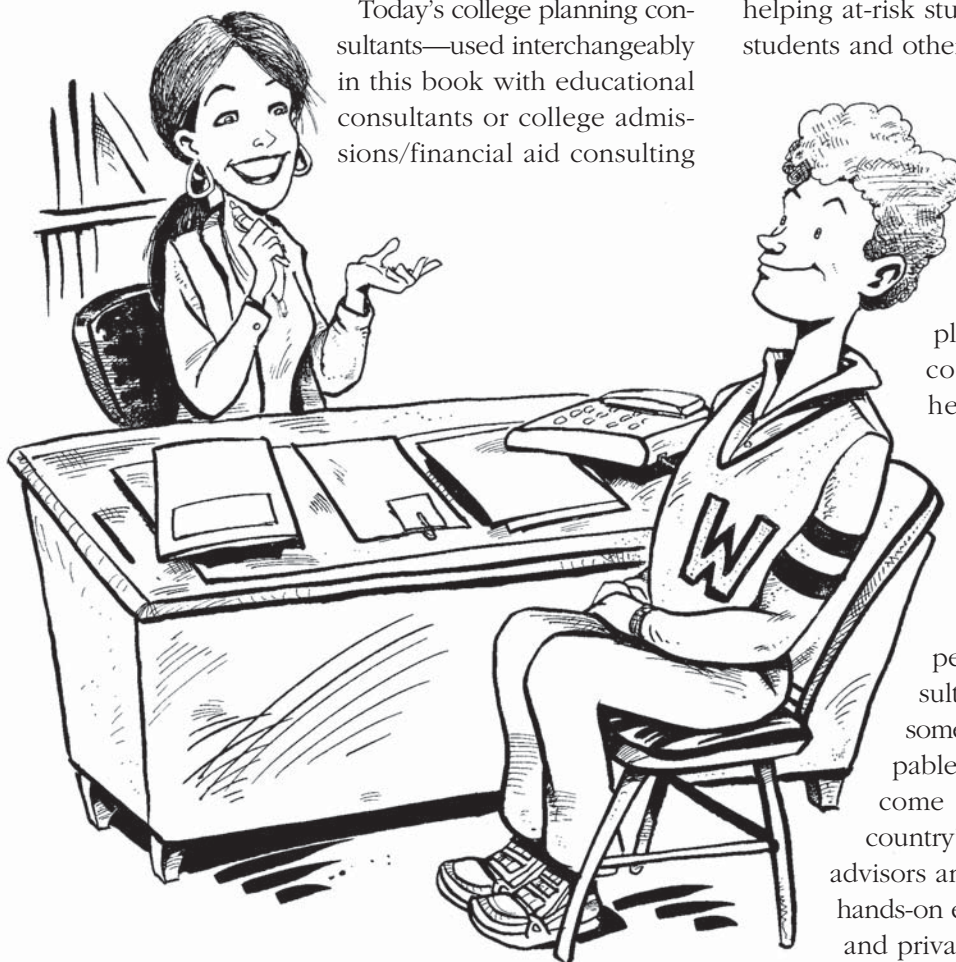
professionals—offer a wide array of valuable services to students and their parents. For instance, they help steer students during their high school days to the academic, extracurricular and athletic pursuits that will increase their chances of being admitted to the college(s) of their choice. They help them wade through the mounds of paperwork necessary to apply for both admission and financial aid, and they make sure the forms are submitted on time. They also specialize in helping at-risk students, learning-disabled students and other nontraditional students

achieve their highest potential.

In extreme cases, they may even help save lives, which may sound dramatic until you consider that placing at-risk young people firmly on the path to college success truly can help them avoid making bad lifestyle choices that could negatively impact the rest of their lives.

### **Head Of The Class**

According to the Independent Educational Consultants Association (IECA), some of the best and most capable educational consultants come from the ranks of the country's experienced academic advisors and counselors, who gain hands-on experience at both public and private universities, colleges,



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and secondary and elementary schools. (Or at any rate, they have the easiest time making the transition to educational consulting, given their background, says Mark Sklarow, executive director of the IECA. See “Background Check” below for more information.) In addition, they often have titles like certified educational planner (CEP) or licensed educational psychologist, as well as an alphabet soup of other prestigious academic letters after their names, including Ph.D., MBA, M.A., Ed.D. (Doctor of Education), and Ed.M. (Master of Education). On the financial aid side, some consultants are even CPAs or credentialed financial planners.

Both this experience and educational background is important for someone who wishes to hang out a shingle as an educational

consultant, because frankly, the college admissions field in general and the financial aid consulting industry in particular both have a rather unsavory reputation. The popular press frequently warns the public about shady consultants who gleefully scam unsuspecting families of limited means who are desperate to find the best college and/or aid package. They report that consultants charge ridiculous fees, up to and including an exorbitant percentage of the financial aid package. They’ve also written about how some unscrupulous consultants “guarantee” that they can get a child a full ride at a competitive university, then slink away, retainer fee in hand, leaving the student and his parents high and dry.

Then there are the dabblers, or the people whom Santa Fe, New Mexico, educa-

## **Background Check**

**There’s a prevailing notion that** private school, high school and college counselors make the best educational consultants because they have spent so much time with kids, have read students’ files, are familiar with standardized tests and so on. But according to Mark Sklarow, executive director of the Independent Educational Consultants Association (IECA), a counseling background isn’t mandatory to be successful in this field.

“In my experience, counselors have the easiest time making the transition [from education to educational consulting],” he says. “They definitely get the one-on-one stuff. But although they understand the administrative part of counseling, they usually lack small-business skills. Also, they usually only know their own school or college and the surrounding area but usually not much beyond that. In addition, they usually don’t see the learning-disabled kids or the ones who don’t know what they want out of life. So they have a steep learning curve just like someone who doesn’t come from academic counseling.”

Conversely, Sklarow says that some of the other people who come to IECA, including everyone from lawyers to real estate agents, understand the small-business picture but lack the hands-on academic piece of the consulting pie. So what’s an aspiring educational consultant to do? To begin with, look for a mentor who will allow you to work with him or her to learn the ropes. Then join an organization like IECA, the Higher Education Consultants Association or the National Association for College Admission Counseling. You’ll find more information about these groups in Chapter 7.

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### Fun Fact

The SAT was introduced in 1926 to measure the academic achievements of college-bound students. Although the name has undergone numerous changes over the years (the acronym once stood for Scholastic Achievement Test), the College Board says the initials don't stand for anything anymore. However, the Princeton Review irreverently says SAT stands for "Stupid, Annoying Test."

tional consultant Whitney Laughlin refers to as the "Mommy Corps." These are the aspiring consultants who come by their knowledge of the college application process from having shepherded an offspring or two through the experience, and may even have succeeded in getting said children admitted to a prominent university. They figure that having navigated the choppy waters of college admission successfully, they have the right stuff to turn their knowledge into a thriving career. In some cases, they have degrees themselves, although more often than not, those degrees are in fields other than education or counseling.

But what the dabblers usually don't have is insider knowledge of a wide variety of college campuses the way professional counselors do. They don't know the right people at the university level to contact for insight and information. They also don't have experience dealing with complex personalities and figuring out how to match kids to the institution where they'll thrive and grow. In short, they're trying to build a business without paying their dues—and that can be a real handicap when it comes to running

a successful educational consultancy.

"The college admission process may seem intuitive, but it's based on a cumulative process of experience that includes visiting colleges; going to conferences, seminars and workshops; and knowing enough about various colleges to help students pick the right one," Sklarow says. "The person who says, 'I got my daughter into Bryn Mawr, and it was so much fun that I can't wait to help others get into college, too,' won't have enough knowledge to connect the right kid to the right college. You have to go out and visit 40 or 60 colleges, so when you meet a kid, you have an aha moment and recognize that he seems like a Penn State kid, for example, rather than a Temple kid."

### Getting An Education

Don't get us wrong. Our point here isn't to discourage you from pursuing a career in educational consulting if you don't have decades of academic counseling experience. It is possible to build a career in this field if you have the drive and determination, a willingness to invest time in professional development, and a commitment to excellence. But there's no question that people with previous admissions experience have an edge, and that it will take a lot of work to develop the knowledge and contacts you'll need to do the job right if you don't have that experience. And as Sklarow points out, you'll also have to travel extensively to visit college campuses and get to know what they offer, and it usually will be at your own expense. Universities generally pay expenses only for experienced consultants, since they're the ones who are most likely to make successful placements at their institutions.

Whether you're a relative neophyte or an experienced counselor, this book will provide you with the tools and insight you'll need to launch a college admissions and financial aid consulting business. In the

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### Stat Fact

In 2005, there were 27,468 public high schools in the United States. The top three schools in 2005, according to *Newsweek's* “100 Best High Schools in America” list, were Jefferson County, Irondale, Alabama; the International Academy, Bloomfield Hills, Michigan; and Stanton College Prep, Jacksonville, Florida.

chapters ahead, we'll cover all the business basics, from establishing your company as a legal entity to outfitting a home office, handling the finances, promoting your services and so on. We'll assume you already have the basic knowledge you need to help young students realize their dream of attending the university of their choice. If you do need assistance with how to counsel eager young students, make college placements, advise about financial aid packages, or otherwise run the educational consulting side of the business, you'll find it helpful to join an organization like IECA. You can also check out the professional development opportunities discussed at length in Chapter 7.

### Class Picture

In the meantime, before we delve into the nuts and bolts of running your own homebased college planning business, a little background on this industry is helpful.

The IECA estimates that in the United States, there are only about 2,000 educational consultants, 500 of whom belong to its organization. This is strictly a guess, because not everyone who provides educational consulting services chooses to join a professional membership association like

IECA. But using that figure as a benchmark, that works out to about one consultant per 8,000 students (based on a student population of nearly 16 million). What's more, IECA says that some states—including Idaho and Oklahoma—do not yet have even a single educational consultant among their ranks.

Even the federal government doesn't track educational consultants as a specialized group. The closest thing to a classification for this group of professionals can be found in the *Occupational Outlook Handbook, 2006-2007 Edition* (U.S. Department of Labor). The handbook has a “Counselor” category with a subcategory that includes educational, vocational and school counselors who work primarily in elementary schools, secondary schools, colleges and universities. It's reasonable to assume that the 248,000 individuals in that category are primarily employed by various organizations and schools. The rather vague “Counselors, all other” category, which numbers 25,000 people, is more likely to be where the independent consultants reside—but no one really knows for sure!

What is known is that the Department of Labor says that overall employment for counselors in general is expected to grow faster than average through 2014. So the opportunities for an enterprising consultant like yourself to forge a meaningful career doing something you love appear very bright indeed.

### History 101

Just as statistics on who's who in educational consulting are as scarce as undergrads in the library during spring break, so is historical data about the profession. As might be expected, we know far more about the genesis of education in America than we know about the practice of admissions consulting. The first institution of higher learning in the United States actually predates the Union by nearly a century

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and a half. Harvard College, which is the oldest school of Harvard University, was founded in 1636, a mere 16 years after the Pilgrims landed at Plymouth Rock, and opened its doors to just nine students. Seven years later, the first scholarship in history was awarded at Harvard thanks to the largess of a private donor, Lady Anne Radcliffe Mowlson.

Fast-forward to the 20th century. It's believed that educational consultants have been around in one form or another for decades, but it wasn't until the 1950s, with the advent of SAT test-preparation classes, that the career truly began to gain momentum, mostly because parents started realizing that there was a way they could give their kids an edge. One of the earliest consulting programs—if not the earliest—was established in 1968 by Howard Greene, M.A., M.Ed., who still consults with schools and colleges today. Sklarow of the IECA says that the nouveau riche fueled that early demand for educational consultants because they were interested in sending their offspring to boarding school but didn't know where to turn for insider information. As a result, members-only golf clubs and other places where the privileged gathered became the arenas where information about

how to get into the most elite schools—or who could help—was exchanged.

It wasn't long before those who offered boarding school admissions advice realized that offering college admissions counseling could be far more lucrative. After all, there were about 3,000 students in private boarding schools at the time vs. 1 million college students. So while the shift from consulting for boarding schools to colleges developed slowly, Sklarow's theory is that the field really took off when educational consultants stopped apologizing about their livelihood and started focusing on educating parents and students on how they could help them get into the college best suited to their talents and academic abilities.

Sklarow says, "We'd see people stand up at conferences and meetings and say, 'I'm an educational consultant—I know, I'm sorry about that.' But the fact is, 'our' kids are more likely to graduate and to go to private universities. As a result there's been a fundamental shift in attitude about the profession, and in particular, our impact has been dramatic at small liberal arts colleges. An awful lot of kids [who go there] have worked with IECA members."

Today, those kids' parents are no longer just the wealthy and privileged. Overwhelmingly, they're suburban professionals who want to make sure they find the best possible educational environment and financial assistance for their budding scholars. And Sklarow predicts that there's yet another market starting to percolate right now. "The next big trend will develop within the next 10 years or less among the middle class in both urban and suburban areas," he says. "They will have more of a need to know about financial aid than ever, which means there will be a greater need for consultants to help them."

Steven Antonoff, an educational consultant in Denver, says another trend today is consultants helping clients choose



### Fun Fact

The first public high school in the United States (now called English High School) was founded in Boston in the winter of 1821 and was open to any boy aged 12 or older who could pass the entrance exam. This was a revolutionary idea for its time, because advanced learning previously had been open only to the wealthy.

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**Smart Tip**

When visiting college campuses, be sure to bring along a journal in which you can note your impressions about the campus as well as details about the academic and social environment, athletics, housing and other characteristics. Once you've visited several colleges, they all start to look alike, so having notes on each one will be very helpful later.

schools. "There is a great demand for consultants who know the process to get Junior through the college application experience, but it's important to be knowledgeable about college environments and how Junior will fit in," he says. "Good consultants are both process- and knowledge-oriented."

**Who Needs You?**

You'll find most of your clientele are likely to come from the following demographics:

- Busy parents who have neither the time nor the energy to do all the legwork necessary to find the right college for their kids
- Parents who value time more than money and would rather spend what free time they have on personal and/or family pursuits and pay someone to pore over college catalogs or applications for them
- Parents who want/need their kids to have more personal attention than is usually available from high school counselors. "School counselors are so overworked," Sklarow says. "On average, today's counselors have an average of 600 kids to counsel, or up to 1,000 or more in schools in large cities like Los Angeles. They're often dealing with drugs and alcohol, crisis intervention, and even lunch-

room duty, so college counseling usually is a really low priority."

- Parents who know other people who use educational consultants and feel their kid(s) will be at a disadvantage if they don't use a consultant
- People who are overwhelmed by or impatient with the application process (so much paperwork, so little time!). This is especially true when it comes to financial aid, which of course must be reapplied for every year.
- Parents who are anxiety-ridden about getting their kids into the "best" schools. "It used to be simple: If a kid's SAT scores were good, she would go to Penn," says Sklarow. "If the SAT scores were lower, that same kid would go to Temple. Now, almost the entire senior year is given over to college anxiety."
- People who perceive educational consultants as insiders (which of course you will be once you establish the right contacts) and as a result are in the best position to help them make the wisest collegial decisions

So how can you serve these diverse audiences well? To begin with, you'll need to make the college circuit in person to glean as much insight as possible about local universities, Ivy League schools, Big 10 and other nationally known schools, or all of these, depending on your personal interests and your clients' choices. Because there are more than 4,000 colleges and universities in the United States and only one you, you may wish to follow the lead of educational consultants who choose to specialize in particular fields or offer specialized services. For instance, there are counselors who focus on Ivy League placements, others who counsel learning disabled (LD) or at-risk kids, and still others who place athletes or performing arts students. Also, you'll need to get some education yourself, both as a business owner and as a student of educational consulting. We'll help you with both in subsequent chapters of this book.

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### On The Money

You're no doubt wondering whether the financial rewards of being an educational consultant are worth the significant efforts necessary to establish your business, considering all the traveling, fact-finding, student meetings, office administration, and other tasks you'll be doing. The short answer is: Yes, eventually. Like most business startups, there's a learning curve and a corresponding earnings lag. That's why the entrepreneurs we spoke to for this book say that if you're contemplating establishing a college admissions and financial aid consulting business, you might want to make it a sideline rather than full-time pursuit in the beginning.

"We typically tell new consultants that they are likely to have a net loss in the first year because of the learning, traveling, campus tours and office equipment they'll need," Sklarow says. "They can expect to break even or earn up to \$15,000 in the second year, then be making a real salary in the third. The caution is: It all depends upon

how effective you are in the marketing and promotion of your business."

"Since you won't make money right away, you should keep your day job," adds Steven Antonoff. "The sole exception is if you happen to be someone who doesn't need an immediate income or you're not income-dependent because there's a second breadwinner in your family."

Here's the scoop from IECA on how much you can earn once you get that academic ball rolling:

The average rate charged by educational consultants is \$140 an hour, with a range of about \$75 to \$300. Sklarow says about a third of consultants charge by the hour. The average package cost for a college placement (typically starting in 10th or 11th grade through college enrollment) is \$3,200, with a range of \$750 to \$7,500. There are exceptions to this rule, of course—we've heard of one consultant who charges (and gets) \$30,000—but the only typical exception to this rule nationally is in New England, where the average is just under \$4,000.

### America's Top Colleges

- Harvard University
- Princeton University
- Yale University
- University of Pennsylvania
- Duke University
- Stanford University
- California Institute of Technology
- Massachusetts Institute of Technology
- Columbia University
- Dartmouth College
- Washington University in St. Louis
- Northwestern University
- Cornell University
- Johns Hopkins University
- Brown University
- University of Chicago
- Rice University
- University of Notre Dame
- Vanderbilt University
- Emory University
- University of California-Berkeley
- Carnegie Mellon University
- Georgetown University
- University of Virginia
- University of California-Los Angeles
- University of Michigan-Ann Arbor

Source: U.S. News & World Report, "America's Best Colleges 2006"

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So let's do some math. If you have 10 paying customers who choose your \$3,200 package, your gross annual income would be \$32,000. Or if you counseled 25 kids a year—which is entirely feasible by your third year—you would earn \$80,000 a year.

Conversely, if you counsel 10 hours a week at \$150 an hour, your annual income for a 45-week year would be \$67,500 (the other seven weeks would be set aside for vacation and travel to campuses). So as you can tell, there is some serious money to be made once your business is up and running. The trick is to make it through those lean and hungry early years.

### **Voices Of Experience**

In the chapters that follow, you'll learn everything you need to know to launch your new college admissions and financial aid consulting business. But perhaps what may prove in the long run to be even more valuable to you is the input and views of the experienced educational consultants who agreed to be interviewed for this book. You'll find their insight and comments interspersed throughout the book. In addition, these entrepreneurs



#### **Smart Tip**

A useful reference book you should have on your desk is *The Best 361 Colleges: The Smart Student's Guide to Colleges* (Princeton Review). It's a compilation of comments from 110,000 college students on everything from college classes to social activities, and includes information about admissions and financial aid. It's updated annually so the 411 is always fresh.

#### **Beware!**



Never counsel for free, even when the students are disadvantaged, says Santa Fe, New Mexico, consultant Whitney Laughlin. Requiring students to pay something invests them in the counseling process and makes them take it more seriously. If the person is very poor, Laughlin recommends bartering. For instance, she has had her house cleaned and has accepted artwork and jewelry as payment.

have agreed to serve as a resource for you if you ever have general questions pertaining to your new career. These entrepreneurs include:

● **Steven R. Antonoff, Ph.D., CEP, Antonoff Associates, Denver:** This published author has been an educational consultant since 1981 and assists approximately 100 students annually with their college decisions. (One of his books, *College Match: A Blueprint for Choosing the Best School for You* [Octameron Associates], will be of particular interest to aspiring educational consultants like you, since it focuses on how to make good decisions when matching students to universities.) Previously he served as Dean of Students, then as Dean of Admission and Financial Aid, at the University of Denver, where he also earned his Ph.D. in psychology and human communications studies. He also holds an M.A. degree in education from the University of Denver and a B.S. in psychology from the University of Colorado. In addition to consulting, Antonoff serves as the IECA's Dean of Education and Training Programs, teaches online college consulting courses

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through the UCLA Extension certificate program, and does a lot of public speaking.

● **Joan Bress, LCSW, CEP, College Resource Associates, Worcester, Massachusetts:** Bress has more than 20 years' experience as an educator and LCSW (licensed clinical social worker), with a specialty in adolescent development and family therapy. Since establishing her consulting practice in 1999, she has worked with students with many interests, although performing arts is an area of particular interest to her. She is an oft-published writer of articles on college issues for both local and national publications, and she often presents

Pembroke Hill School, Kansas City, and as a result has long-standing associations with numerous college admissions personnel. He has a bachelor's degree in business administration and economics from the University of Redlands in California and a master's degree in history from the University of Missouri-Kansas City.

● **Charlotte Klaar, CEP, College Consulting Services, Brunswick, Maryland:** A self-employed educational consultant since 1995, Klaar holds a B.A. degree from the University of the State of New York and a master's in interdisciplinary science studies from Johns Hopkins University. She is currently in a Ph.D. program in general psychology with an emphasis on family psychology at William Paterson College in Wayne, New Jersey, and also has a teaching certificate on the graduate level from the same institution. In addition to running two separate educational consulting practices, one in Maryland and one in Massachusetts, she shares her knowledge of the consulting profession by teaching classes in the UCLA Extension certificate program in college counseling.

● **Whitney Laughlin, Ed.D., Whitney Laughlin Ed.D. Educational Consultant, Victoria, British Columbia, and Santa Fe, New Mexico:** Laughlin began her educational career in 1971 as an ESL and Spanish teacher in a Mayan village in Yucatan, Mexico. Since then, she has had an eclectic career in education, ranging from director of admissions and financial aid to college counselor. She also is the director and founder of College Horizons Program, a summer pre-graduate-school program for Native American college students. She earned an Ed.D. degree in educational administration and nonprofit management from the University of California at Berkeley, an Ed.M. degree in administration, planning and social policy from Harvard Graduate School of Education, and an M.A. in Spanish and women's studies



### Fun Fact

The SAT test-preparation business is a \$310 million-a-year industry, according to Eduventures, an education market research firm. And that number could rise since the SAT underwent extensive revisions in 2005. The nail-biting college entrance exam is now 45 minutes longer than before and has a maximum possible score of 2400, up from 1600.

college prep seminars and workshops for students, parents and teachers. She holds an MSW (Master of Social Work) degree from Simmons College School of Social Work in Boston, an M.A. in Romance languages from Boston University, and a B.A. degree in Spanish literature from the University of Pennsylvania.

● **James C. Heryer, M.A., CEP, College Guidance and Placement, Kansas City, Missouri:** This certified educational planner has been a college consultant since 1989. Formerly he was director of college placement at the

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from Goddard College in Plainfield, Vermont. Over the course of her 25 years in education, she has visited about 500 college campuses. She founded her consulting business in 1996.

● *W. Judge Mason, M.A., Judge Mason Educational Consultant, Sedona, Arizona:* A self-employed educational consultant since 2001, Mason holds a bachelor's degree in philosophy from Yale and master's degrees in East Asian studies from Harvard and in English from Wayne State University in Detroit. He has decades of educational experience, ranging from teaching at International Christian University in Japan to serving as dean of students, academic dean and college counselor at various educational institutions. He is a founding member of the Southwest Boarding Schools and Western

Boarding Schools, and a member of the governing board of the IECA.

● *Sarah Soule, Sarah Soule & Associates, Burlington, Vermont:* Soule has more than 20 years' experience working with college applicants, early in her career as the coordinator of group travels for the Northern Vermont Consortium of Colleges (for which she also served as president) and now as director of school, college and community relations at Vermont Commons School in South Burlington, Vermont. She was named Admissions Counselor of the Year in 1997 by the New England Association of College Admissions Counselors and founded her part-time consulting business in 2003. She is a graduate of Johnson State College in Johnson, Vermont, with a B.A. in English, and holds a certification in elementary education.