

# **THE STRATEGIC ACADEMIC ENTERPRISE**

**Why ERPs Will No Longer  
Be Adequate**

*A Datatel Position Paper*



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## THE STRATEGIC ACADEMIC ENTERPRISE – WHY ERPs Will No Longer Be Adequate

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In the seventies and eighties manufacturing firms began purchasing centralized administrative software termed Enterprise Resource Planning (ERP) systems to support their infrastructure needs. In the nineties higher education adopted the term ERP to define the back-office systems used by institutions to meet their most pressing business needs, typically related to financials, human resources, and student information. Over the years, however, institutions have struggled with a variety of issues outside the scope of what a traditional ERP system can manage – from effectively connecting with the community to successfully marketing the campus vision and spirit, to offering a teaching and learning experience that aligns with the institutional mission. These issues, as well as a host of others, have rendered the concept of ERP inadequate for meeting the business and academic needs of higher education institutions.

Three dramatic trends are occurring in the higher education industry. Alone these trends are nothing that institutions haven't faced before, adapting accordingly to continue to be successful. However, these trends have converged, causing a dramatic shift in the way higher education institutions operate and strive to fulfill their intrinsic vision of student success. These trends can be identified as the need to serve multiple generations; a shift in teaching and learning standards; and the ever-present yet escalating issue of affordability.

### SERVING MULTIPLE GENERATIONS AT THE SAME TIME

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Imagine an incoming freshman class that includes your 17-year old daughter, your 40-year old brother, your mother, and your grandfather. Possible? More than ever before multiple generations are interacting with colleges and universities at the same time – as students and as parents. Each generation – Baby Boomers, Generation X, and Millennials – learns differently and wants unique services from an institution.

In order to meet the varying needs of these emerging students, parents, employees, and communities, institutions will need to offer several different ways for a student to accomplish the same task. Everything will be affected, from enrollment, registration, curriculum, and housing, to financial aid, safety, facilities, and more.

#### **WHO ARE THEY?**

Shaped by current events, each generation is drastically different from the next.

#### **BABY BOOMERS**

Born between 1943 and 1960, Baby Boomers grew up during the post-World War II era of optimism. They witnessed the Cold War, Space Race, Civil Rights movement, Vietnam War, "summer of love," and much more, which shaped their beliefs and values. They are the first generation that grew up with television in the house, sharing the same programs, news, and laughs across the nation. It has been said that boomers helped transform the current educational system.<sup>1</sup>

#### **GENERATION X**

This is the MTV generation born during 1961-1981. Widely criticized as slackers, they opted out of traditional careers and "jumped" from company to company, climbing the corporate ladder faster than any generation before them. This generation grew up with the Internet, latchkeys, AIDS, the fall of the Berlin Wall, and the collapse of the Soviet Union. Gen Xers are independent and hands-off, yet some have become our greatest entrepreneurs.

## SERVING MULTIPLE GENERATIONS AT THE SAME TIME (cont'd)

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### MILLENNIALS

The ubiquitous Baby on Board sign was a true indication that the minivan was safely transporting a Millennial (also referred to as Generation Y). Born to Baby Boomers and Generation X parents, this generation grew up during the most child-centric times in our nation's history, giving them a great sense of self-confidence. Technology has always played a significant role in their lives and has had profound effects on how they communicate and learn. In general, Millennials are team-oriented multi-taskers who follow and prefer structure and rules. "Millennials are unlike any other youths in living memory," said Neil Howe, co-author of *Millennials Go to College*. According to Howe, "they are more numerous, more affluent, better educated, and more ethnically diverse than those who came before."

### HOW WILL THEY AFFECT CAMPUS SERVICES?

Approximately 90 million Millennials<sup>II</sup> expect to use technology for almost everything, from finding an institution on the Web to collaborating with their classmates. This is nothing new. But add to the mix the Baby Boomers and Gen Xers who are returning to the classroom in record numbers. The US Department of Education reports that as of 2005, nearly 520,000 adults over 50 were enrolled as college students.<sup>III</sup> And it is only increasing each year.

Baby boomers are not afraid of technology but institutions must have personal services available immediately or this generation will move on to another opportunity.<sup>IV</sup> The independent Gen Xers will undoubtedly want to use technology for registration and even classes, but the moment they don't like the service or the offering, they are gone without a word.

Higher education institutions will need to manage the balance of technology and personal face-to-face services and be flexible enough to adapt for quick changes depending on the customer.

Curriculum should also change to meet the needs of the newest students. According to the popular YouTube video, "Shift Happens," the top 10 jobs anticipated in 2010 didn't exist in 2004. The former Secretary of Education Richard Riley reported that this trend will only continue. In other words, today's students need to be preparing for jobs that don't even exist today to solve problems we don't know about yet.<sup>V</sup>

Some Baby Boomers and Gen Xers are returning to complete their bachelor's degree after stopping to raise a family. Others are seeking a new career path or want to earn their master's or Ph.D. Boomers have strong desire to help their communities. Many are switching careers before retirement to help the poor, children, and the elderly. They are taking courses online and physically attending classes to learn the necessary new skills.

How can institutions prepare students for jobs that don't exist? In addition to offering the right curriculum to help students reach their goals, higher education institutions will need to more effectively market their business courses to demonstrate how the knowledge learned can be transferred to help the community.

### PARENT FACTOR

Not only are institutions managing three unique generations of students, but they are interacting with them as parents more than ever before. While Baby Boomer parents have affectionately been named "helicopter parents," Generation X parents are 10 times more involved and therefore could be called "stealth-fighters."<sup>VI</sup> Gone are the days when parents dropped the student off in the fall and institutions wouldn't hear from them again until they picked their child up for Thanksgiving break. Heavy parental involvement has become the norm – emailing, calling, even demanding visits with professors about their child's progress or lack thereof. "FERPA be damned," they want to see their children's grades. Some institutions have even had parents join the students at registration. And most students now want their parents to be involved. These parents need services to help them stay close and informed about their children's progress.

## TEACHING AND LEARNING PARADIGMS NEED TO SHIFT

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We have entered into a new era of teaching and learning – moving from knowledge-based to a new world of search. The vast availability and quantity of information on the Internet has enabled today's students to learn differently. They no longer need to memorize the capitals of the world because they can simply google them.

Students today do not need to be “taught to the test” by memorization. They want to learn by action, application, contact, and real-life scenarios. Institutions need to be ready to support this new kind of teaching and learning. Students' collaborative and multi-tasking nature coupled with their knowledge and use of technology demands a new way of teaching. It is more than simply offering online courses, but reviewing the pedagogy to ensure it meets the needs of all students.

A recent research paper by EDUCAUSE Center for Applied Research (ECAR), “Learners 2.0? IT and 21st Century Learners in Higher Education,” stated that the traditional stand-and-deliver lecture format style of teaching will not be adequate to help students develop the necessary skills to succeed. It went on to suggest that learning needs to shift to student-centered and technology-enhanced to engage the students.<sup>VII</sup>

To accommodate a new kind of learning, institutions need to also adjust how they view students. Instead of seeing students as passive receivers of information and unengaged learners, educators need to treat them as “big-picture thinkers and critically engaged doers.”<sup>VIII</sup> Professors need to bring students into the process and even rely on the students' technology and Internet expertise.

Professor Michael Wesch at Kansas State University collaborated with 200 of his students to create a video, called “A Vision of Students Today,” that summarizes how students want to learn today.<sup>IX</sup> Not only is the video an insightful view of students, but the students created this video as part of the class. In a presentation to nearly 150 higher education executives at Datatel's 2008 CIO Executive Forum, Dr. Wesch explained how his class created its own countries and democracy, an exercise that required independent thinking and teamwork to solve problems.

To accommodate the learning styles of today's students, professors will need to adapt their courses and use effective tools for better collaboration.

## AFFORDABLE EDUCATION IN THE 21ST CENTURY

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As always, economics plays a role in change. Colleges and universities need to compete more than ever before, offering better curriculum at better prices. There is no doubt; we are in a credit crisis that is affecting students' ability to secure the necessary funding for their education and institutions across the country are feeling the effects. With dwindling subsidies, how will higher education close the gap between tuition fees and the rising cost of education? Can students and families handle more tuition hikes?

State funds, private donations, and earnings from endowments traditionally bridge the gap between tuition and the final cost to the institution. But those subsidies are rapidly declining as priorities shift in governments, the market, and household incomes.

For more than 10 years, the percentage of increase in the cost of higher education has outpaced housing, transportation, even health care. Some private col-

leges will charge more than the nation's median family income of \$50,000 according to the *Chronicle of Higher Education*. More and more families will apply for financial aid and record numbers of students will graduate with greater debt. In 2007, students had 63 percent more debt than those that graduated in 1993, even after adjusting for inflation.<sup>X</sup>

The answer according to the *Chronicle* and leaders at several institutions is productivity — offer a better educational experience at a better price.

To meet this challenge and the others, higher education will need to dramatically transform the way it does business. To compete successfully in this new environment, institutions will need to merge academics and administration to provide more strategic services. The traditional ERP is no longer sufficient to support this new business model.

## WHY WON'T THE ERP BE ADEQUATE?

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Gartner, Inc. defines an ERP system as administrative software comprising at least three components that are loosely or tightly coupled (HR, financials, and student information). Although the following capabilities are not requirements for inclusion in Gartner's Magic Quadrant, they are important to higher education and often included in requests for proposals and quotations:

- Grants management, with both pre-award and post-award tracking and management
- Advancement, including fundraising, corporate giving, and alumni management
- Facilities scheduling
- Enterprise portals
- Research management
- Relationship-based enrollment management

This list, however, does not adequately represent all the areas and functions that require attention in order for an institution to remain competitive and agile in this market.

The higher education industry needs to go beyond the traditional back-office ERP system and adopt strategies and solutions that cross the entire campus, blending the academic and administrative enterprises.

## BEYOND THE ERP – THE STRATEGIC ACADEMIC ENTERPRISE

Strategic Academic Enterprise™ is the evolution of ERP. A strategic, holistic solution, Strategic Academic Enterprise addresses the complete business and academic needs of an institution, providing a campus-wide experience of enhanced user satisfaction, increased productivity, and greater institutional effectiveness.

Rather than artificially separating the back-office technology and the front-office academics, institutions will be better positioned to achieve the ultimate goal of student success and satisfaction through the Strategic Academic Enterprise, which consists of five interrelated business process domains: Strategic Enrollment Management, Institutional Advancement and Marketing, Teaching and Learning, Performance and Operational Management, and Strategic Planning.

**Strategic Enrollment Management (SEM)** encompasses the entire student cycle, from prospective students to alumni. A crucial goal of SEM is continued growth, attained by coordinating efforts in areas such as marketing, student recruitment and retention, tuition pricing, financial aid, academic and career counseling, curriculum reform, community building, and donor solicitation.



When you view the relationship with a student from beginning to end, you quickly realize the importance of great customer service. This means offering a balance of online services with personal, face-to-face care.

Recruiting needs to begin at an institution's website with personal information that is important to the student as well as to the parent. The website should reflect the institution's spirit and brand and be easy to navigate with critical information like financial aid and the application process front and center.

The more personal the communications are, the faster the students and parents will know if the school is the right fit for them. Today's parents and students will undoubtedly choose their higher education institution together so it's critical to include the parents in the marketing mix, even targeting them separately with specific messages that are important to them, such as finances, safety, and career path success rate.

Outstanding customer services should not stop after recruitment. A strong retention plan will keep both students and parents happy. For example, online registration needs to be easy to use and intuitive, and more personal assistance should be readily available for those who find Web services complicated, such as some Baby Boomers and Gen Xers.

No matter how tech-savvy students are, they still want personal attention. Maneuvering through the intricacies of college will not be easy for some students, and institutions need to be prepared to help them with strong advising if they start to falter. The ideal plan should include the ability to monitor and track student behavior so administrators can immediately intervene and help students succeed. Many institutions' advising plan consists of a combination of one-to-one planning sessions and online capabilities, which satisfies the tech-savvy Millennials, the independent Gen Xers, and the returning Baby Boomers.

It is critical for institutions to review their services to ensure they meet the needs of three very distinct generations in order to generate a high return on investment.

## BEYOND THE ERP – THE STRATEGIC ACADEMIC ENTERPRISE (cont'd)

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**Institutional Advancement and Marketing** creates emotional ties to the institution with coordinated outreach to all constituents, including alumni, parents, community members, and the media at large.

During this economic crisis it is important to continue to build new and strengthen existing relationships with alumni, donors, and the community. As the gap between tuition and administrative costs increases, institutions will need to look more and more toward alumni and friends. However, many institutions are already seeing a significant decrease in donations and endowments during a volatile market, making it imperative to develop a tight-knit alumni community to help weather out this time.

Having the right tools to help improve efficiencies and increase productivity will be critical to the bottom line. Institutions should be able to track fundraising communications and campaigns from the beginning to monitor progress toward goals and adjust if necessary. When a step or task is complete, communications management functionality should be able to automatically send the next message based on where the person is in the communication loop. This automation will give staff more time to help students directly.

Building an emotional tie to the institution may be difficult considering how the three generations may respond to marketing in general. Although each will react to different messages and marketing vehicles, an institution's brand must remain consistent throughout.

The first place to solidify marketing is where the potential student, regardless of age, starts their search – Google. Ideally, institutions should think about the attributes they want a prospective student or parent to type into Google that would result in their institution ending up at the top of the search list. Those key words should be used on the website and other marketing materials. Once students get to an institutional website, it needs to be a reflection of the culture and spirit of that institution – for students, parents, alumni, donors, friends, and the media. Visitors should be able to visualize that they belong.

Beyond the website there are a wealth of new and exciting marketing vehicles to use to promote the attributes of an institution – direct mail, email, text messaging, YouTube, SecondLife, campus visit videos, FaceBook, blogs, LinkedIn, and on and on. The mix of vehicles truly depends on the audience. For example, each generation would react differently to a text message. Baby Boomers would not appreciate it. Gen Xers might feel like you are violating their privacy. However, Millennials – if asked to opt-in to such a service – may prefer to learn about their acceptance by text. Each generation should have its own messages and vehicles to increase marketing success.

Another important concept to consider is the purchasing habits of these generations. Millennials purchase with not only parent consent but with their help and support.<sup>XI</sup> Brand value will be assessed by both Baby Boomers and Gen Xers, yet of course slightly different. In the past, institutions could raise tuition and this would increase the brand value in the eyes of the Baby Boomers. Today, Gen Xers, as parents and as students, along with their children, will need to see the proof of an institution's value through the curriculum and the technology used to enhance to it. More importantly, they will want verification that the education their children receive will help them get a job after graduation.<sup>XII</sup>

Strengthening the alumni community and marketing with a consistent, strong message will appeal to the audience and differentiate the institution.

**Teaching and Learning** is at the heart of every institution's vision and mission. Today technology is a consistent presence in all that we do. Students today demand technology that helps improve the teaching and learning. Online classes are great to bring the information together but how effective are they in bringing the students together? Technology must help students collaborate, work together in teams, and create and strengthen communities.

## BEYOND THE ERP – THE STRATEGIC ACADEMIC ENTERPRISE (*cont'd*)

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A close examination of Facebook, MySpace, and other online communities will help institutions develop strategies not only for recreating that type of social environment on campus but for transferring that vibrant energy to the classroom, online or in person. Students are spending significant time – more than 1,200 hours – on updating their profiles on Facebook.<sup>XIII</sup> Institutions can enhance teaching and learning by emulating the constant interaction and sharing found in these online communities.

Technology is not the only enhancement to teaching and learning. Helicopter parents and now stealth fighters are asking how will the institution help my child get a job? The bigger question, however, is what job will that be? Since institutions are training students for jobs that don't even exist yet, they need to go beyond teaching students how to solve problems and help them develop "problem-posing capabilities."<sup>XIV</sup> This generation doesn't need to memorize all the works by Shakespeare since they can google it. They hunger for practical skills that can be applied to any career.

Baby Boomers and Gen Xers want a curriculum that goes further than a master's or Ph.D. They also demand practical learning that will directly affect their end goals. Baby Boomers in particular are looking for skills to help with their next career in the community. Many are coming from business careers where collaboration and team work are the norm. The stand-and-lecture style class of their old alma mater will not be sufficient. They have vast knowledge that they will want to share and contribute to the class.

Michael Dolence, President of Michael G. Dolence and Associates, recommends focusing on the learner through the curriculum. An approach he calls Learner-Centered Curriculum provides "a framework for the identification, design, development, deployment, and evaluation of curriculum based on significant assessment of the learners. Seven interlocking components ensure that curriculum fulfills institutional and fiduciary missions, while concentrating on the learners' attributes, objectives, and needs."<sup>XV</sup>

The core of any institution is teaching and learning. Today's students demand not only a technology-enhanced education, but also one that is collaborative, team-oriented, and relevant. The ability to easily change and adapt to the needs of different students is critical in today's competitive higher education market place.

**Performance and Operational Management** includes the critical business processes that help institutions optimize their effectiveness. The right administrative offering includes solutions for organizing, automating, and analyzing process methodologies, metrics, and systems to drive an institution's performance.

Productivity is critical to an institution's performance, not only to improve services across the campus but to reduce costs. The right solutions can help institutions manage their business and academic needs more effectively, whether it's ensuring that the right classrooms have been lined up for the next semester or that online services for 24x7 e-commerce are properly secured.

The ideal administrative solution is flexible enough to change as the institution grows and can scale and be modified to meet strategic goals, not hinder them with additional financial burdens. New initiatives, such as increasing enrollment, adding distance learning, or changing databases, should never require the replacement of the administrative solution.

One integrated solution should meet the complete business needs across campus, eliminating interface issues, batch uploads, duplicate data entry efforts, multiple data repositories, and error conflicts. It should help institutions be more productive, remove steps, and improve policies and procedures.

**Strategic Planning** is a disciplined, collaborative process that shapes and guides an institution's identity, mission, and purpose. This outcome-driven process helps institutions develop, align, and deploy long-term strategies and short-term operational plans across the campus and throughout the community.

## BEYOND THE ERP – THE STRATEGIC ACADEMIC ENTERPRISE (cont'd)

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During this challenging time, it is critical to develop a proactive, strategic plan that helps direct the institution now and into the future. To successfully address all three emerging industry trends, the best course of action is a carefully laid-out plan. There are many different directions institutions can take to tackle these challenges, and determining the best fit is key to its success.

The first step of any strategic plan is to carefully examine current internal and external factors that directly impact the institution such as clients, staff, faculty, competition, economy, government regulations, and technology. Institutions should scrutinize their processes and procedures to reveal new ways to accomplish the same goal, which in turn could save time and money. Additionally, accurate, timely, and easy-to-access statistical information is essential for analyzing past performance and can then be used to project future possibilities.

Working with an experienced consultant can be helpful in formulating the best strategic plan and ascertaining the necessary data for effective reporting that provides accurate information for decision making. As impartial members of the strategic team, outside consultants will be able to unveil the tough issues that the institution may not see or may be ignoring.

“Successful leaders use strategies to frame the need for change and to develop their organization's capacity to prosper in a changing and competitive environment,” according to Donald M. Norris, co-author of *A Guide to Planning for Change*. “In the process of planning and crafting strategy, the institution discovers how it must improve its organizational capacity in order to thrive.”

## THE STRATEGIC ACADEMIC ENTERPRISE

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By addressing all five business areas together, institutions undoubtedly will be better prepared to face today's emerging trends and more agile to handle tomorrow's unique challenges. This new approach, the Strategic Academic Enterprise, is designed to help higher education institutions experience enhanced student life, stronger communities, and increased job satisfaction. It helps institutions address the curriculum and service needs of multiple generations of students, while remaining priced to compete.

The days of focusing on administrative and academic separately are waning quickly. The union of these tightly intertwined areas requires a new way of thinking along with enhanced solutions in order for institutions to remain competitive.

## ABOUT DATATEL, INC.

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Datatel® provides fully-integrated administrative and academic solutions to colleges and universities to help them build Strategic Academic Enterprises in support of student success. Serving five million students at more than 760 institutions throughout North America and overseas, Datatel has exclusively focused on higher education for 30 years.

We offer the following comprehensive solutions for the Strategic Academic Enterprise helping institutions be more successful in their mission of student success:

### **STRATEGIC ENROLLMENT MANAGEMENT**

Datatel provides complete SEM solutions to meet a wide range of goals whether they are to increase enrollment by 10 percent or to establish a lasting and growing alumni community. Solutions include ActiveAdmissions™, ActiveAlumni™, Communications Management, e-Advising, Retention Alert, Colleague® Advancement and much more.

### **INSTITUTIONAL ADVANCEMENT AND MARKETING**

Datatel's leading e-marketing solutions – ActiveAdmissions and ActiveAlumni – help build engaging Web experiences to personalize communications, create vibrant communities, and foster life-long relationships. ActiveAlumni along with Colleague Advancement, gives institutions the ability to focus on fundraising campaigns to meet goals. The members of the Datatel Creative Design Team have earned more than 40 industry awards for creating effective, engaging websites that consistently help institutions increase applicants and enrollment.

### **TEACHING AND LEARNING**

Institutions can use the powerful collaborative team sites within Datatel's ActiveCampus® Portal to augment the educational experience, meeting both the teaching goals of faculty members and learning needs of students. Datatel's Gradebook enables faculty to easily manage grades and students can see their progress quickly online.

### **Performance and Operational Management**

Datatel's solutions are designed to help institutions increase efficiencies and productivity across campus, saving both time and money. For example:

- With Colleague, every department works cohesively – Student, Financial Aid, Finance, HR, and Advancement. All the data is integrated into one central database.
- Colleague Workflow fine tunes processes so everyday tasks are routed and completed quickly and easily.
- Using single sign-on, ActiveCampus Portal provides one location for all tools and solutions that staff, students, and faculty need to increase collaboration and productivity.
- Datatel's SuccessOrchestrator reporting solutions includes a wide range of operation, ad-hoc, analytic, dashboards, and scorecards reporting tools, which enables institutions to easily access, analyze and understand accurate, reliable information.

### **STRATEGIC PLANNING**

Datatel offers a wide range of services to help institutions in the area of strategic planning – from complimentary action planning to detailed accreditation assessment – to be certain they are fully leveraging the strength of their campus-wide. The Datatel Center for Institutional Effectiveness provides programs and courses on continuous quality improvement and strategic planning.

Visit [www.datatel.com](http://www.datatel.com) for more information about Datatel and Strategic Enrollment Management.

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4375 Fair Lakes Court  
Fairfax, VA 22033  
1.800.DATATEL  
[www.datatel.com](http://www.datatel.com)