

National Forum on Sustainable Models for Open and Equitable Systems of Education

Introduction

The UNC System requests \$141,341 to convene an LB21 National Forum to identify gaps, opportunities, and best practices for assessing and critically engaging with educational technologies and content models that impact academic freedom, student privacy and agency, and the sustainability of higher education. This Forum will gather librarians and administrators at the major university systems and consortia to develop collective, library-led models for evaluating and supporting more open and equitable systems of educational technologies.

Project Justification

Adoption of digital and online learning resources has radically accelerated in the past half-decade. From academic integrity solutions such as Turnitin and Proctorio to automatic billing bundles marketed as “inclusive access” programs, educational technologies increasingly dominate the landscape of higher education. While these systems promise improved outcomes and efficiency, it is easy for overtaxed educators and institutions to turn to closed commercial solutions that offer a quick fix and the promise of targeted learning analytics at the expense of students’ privacy, instructors’ authentic expertise, and institutional commitments to accessible, equitable education.

One critical factor in this change has been that librarians and other information professionals such as instructional designers are often left out of institutional decision-making. Librarians should be the gateway to institutions and an indispensable broker for partnerships that center access, equity, and sustainability. Instead, commercial providers increasingly sell their products directly to administrators at the institutional, system, or even state level. While librarians have traditionally leveraged their expertise in collections and licensing to lead negotiations that center access, equity, and sustainability, today they often lack a seat at the table. As a result, many institutions are adopting closed, proprietary systems without the benefit of library expertise needed to fully evaluate the ramifications of adopting these tools. Controversial examples such as test proctoring services that track students’ eye movements, personal spaces, and private identities have faced criticism for being overly intrusive. Automatic billing-based “Inclusive Access” services continue to proliferate, challenging emergent OER initiatives. And proprietary surveillance tools such as Turnitin have become so ubiquitous as to become invisible. As commercial services explore the role of AI and large learning models for educational technology these trends are likely to accelerate in the coming years, opening the door to new types of algorithmic bias.

There is a better way to build digital education systems that maximize the benefits and limit the potential harms of educational technologies. But this requires collective action from large-scale systems and consortia that centers and amplifies the expertise of librarians as stewards of the shared values of the academy. This project aligns closely with the attention to the risk posed by commercial surveillance that is increasingly embedded in core academic learning and research technologies that has been outlined by both the White House and the Consumer Financial Protection Bureau (CFPB). A July 15, 2023 SPARC comment highlights the threat to student and researcher data privacy. Our project will provide a means for librarians to develop a shared framework with IT, instructional designers, and campus administrators to understand and begin to mitigate these threats.

Project Work Plan

In order to prepare academic institutions to navigate these issues, the University of North Carolina System will convene a National Forum to identify gaps, opportunities, and best practices for assessing and critically engaging with educational technology systems that impact academic freedom, student privacy and agency, and the sustainability of higher education. This Forum will center the roles and expertise of librarians and connect them with instructional designers, administrators, and policy experts to develop shared buy-in on the forum and its outputs. In particular, we will gather librarians and their peers working in large-scale partnerships, systems, and consortia who are uniquely situated to evaluate the technical, pedagogical, legal, and economic quality of these models. The Forum will leverage this expertise to develop scalable, high-impact, values-led responses to the rise of commercial tools and content models so that institutions can locally implement and widely share concrete solutions.

The primary project activity will be a set of workshops -- with framing activities before, and writing, commenting, review, and dissemination activities following. Participants will be invited to form teams (institutional or cross-institutional) to develop practical pieces on key topics. Major activities include an online

survey of perceived challenges; creation of a bibliography and set of use cases; creation of an extended reviewer and participant database; workshop preparation logistics; workshop hosting and facilitation; drafting of the workshop report with selected key participants; dissemination of the report for public commentary and expert review; incorporation of public commentary and expert review; publication of the final report; and dissemination of summary reports through professional venues.

Diversity Plan

The disproportionate impact of algorithmic bias and surveillance capitalism on underrepresented and marginalized communities has been extensively documented. Uncritical reliance on digital systems disadvantages or simply locks out students and faculty caught in the digital divide, particularly those who are low-income or first-generation. Librarians and other information professionals are dedicated to addressing these concerns through field-shaping work on digital access and equity as well as practice on the ground raising awareness and negotiating for more open and inclusive terms. The UNC System is well positioned to center the outstanding work done by leaders at a diverse set of System institutions from nationally recognized HBCUs at NC Central, Fayetteville State, and NC A&T as well as North Carolina's American Indian and Alaska Native-Serving Institution, UNC Pembroke. We have a strong track record of collective work led by and in service of marginalized students and faculty such as our award-winning Math Pathways project as well as deep work on open and equitable education such as the [Scholarly Communication Notebook](#) and the [SUM Institute](#). We will continue this commitment to work by and for inclusive educational communities at each stage, from developing the initial proposal to hosting the Forum with a diverse set of speakers and participants, to sharing the final outputs openly.

Project Results

The goal of the project is to develop shared understanding, common workflows, and best practices for providing educational resources that are accessible, inclusive, and sustainable. It will address concerns that closed, commercial tools built on surveillance can lock institutions into extractive, inequitable models that hamper or even foreclose open education and infrastructure. The primary output of the project will be information and guidance including a white paper summarizing the significance and areas of need for open and equitable systems; identifying high-impact principles that are accepted and emerging in the broader community; characterizing approaches and methods for applying these principles to institutional decision making; and identifying potential next steps for software developers that develop these systems and for library institutions that adopt and deploy them. We will also develop a website for the project, offer a series of workshops through the [UNC System Learning and Technology webinar series](#) and publish an edited volume in our new [UNC System Learning and Technology Journal](#). Project outcomes will also be integrated into curricula of the three major LIS programs in the System (Chapel Hill, NC Central, and Greensboro) through local programming and incorporation into courses and seminars. Regionally we will also partner with the [Southern Research Educational Board](#) to explore developing a task force to create guidelines in this area and hope to support comparable actions in other regions.

We will evaluate the results of this project using quantitative and qualitative measures before and after the workshop, and after the release of the report draft and final report. Measures will include participant satisfaction surveys; bibliometrics; social media mentions; downloads, and media coverage. The longer-term impact of this project will be in the influence that it has in institutional support and engagement with educational systems and the extent to which educational institutions adopt and employ the recommendations. The broadest impact will be to support systems of education that open up, rather than foreclose, opportunities to make education more affordable, inclusive, and sustainable for all students and for the institutions that serve them.

Budget Summary

The UNC System requests \$141,341 for this work. \$22,500 will be used to hire a part-time project manager who will administer the initial research, coordinate the workshops, and facilitate the public-facing engagement and sharing. We request \$18,162 in salary to cover the co-PIs' efforts. We also request \$78,750 for primary gathering including travel support and refreshments. North Carolina State University will contribute conference hosting facilities. \$2,500 will be used for public sharing and dissemination including public reports, webinars, and conference presentations, and \$19,429 will support indirect costs.