Supporting Students’ Gender Identity: Navigating Policy and Practical Issues in Creating Inclusive Campus Information Systems

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EDUCAUSE Annual 2017
Philadelphia, PA

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EDUCAUSE Preferred Name Working Group

- David Bantz - Identity and access analyst at University of Alaska.
- Geoffrey S. Nathan (Chair) - Information privacy officer for Wayne State University.
- Andrea Lisa Nixon - Director of Educational Research at Carleton College.
- Theresa Semmens - Chief information security officer and director, Records Management, for North Dakota State University.
- Renee Wells - Director of the GLBT Center, North Carolina State University.
- Joanna Grama - EDUCAUSE’s Director of Cybersecurity and IT GRC Programs
Context and Motivations

- External Prompt: Dear Colleague Letter (DCL) from the Department of Education - Title IX protects all students from sex discrimination. May 2016

- Internal Prompts: Requests from our community members and the desire to create ERP’s that are suited to the needs of the communities we support.
Key Administrative Policy Questions
Campus Pride Helps You Identify Kindred Institutions

- Students to use a preferred first name instead of their legal name on campus records;
- Students to change their gender on campus records without proof of medical intervention; and/or
- Students to indicate their preferred pronoun.
Key Policy Issues

- Who may indicate a preferred name?

- Are preferred names vetted and sometimes disallowed?

- Who makes decisions concerning the institution’s procedures and policies concerning preferred names?

- Will you maintain a history of preferred name and who or what services will be allowed to correlate a preferred name with the person's legal name in your records?

- If you adopt use of preferred names incrementally, how will you handle the apparent cacophony of mixed and changing use of names in your systems?
Key Technical Implementation Issues
Key Technical Implementation Concerns

• Choose a location of record

  • LDAP, [your ERP here--ours is Banner]

• select those systems that display names where Preferred Name should display

• Get the owners of all those systems in a single room at a single time at least once
Target Systems

• Learning Management System

• Class lists for faculty

• advisement system (including video name display system)

• grade input pages, both final and interim (ours are different systems)

• residence hall records

• OneCard (whatever you call them)
Wayne State’s Spreadsheet

<table>
<thead>
<tr>
<th>Priority</th>
<th>Application</th>
<th>LDAP/Banner Dependent</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>LDAP</td>
<td>Banner</td>
<td>Current Wayne State University Access Management System</td>
</tr>
<tr>
<td>2</td>
<td>Directory</td>
<td>?</td>
<td>Online directory and printed directory for WSU employees</td>
</tr>
<tr>
<td>3</td>
<td>Academica</td>
<td>Banner</td>
<td>Wayne State University’s Portal</td>
</tr>
<tr>
<td>4</td>
<td>Email</td>
<td>LDAP</td>
<td>Wayne State University’s communication and collaboration system</td>
</tr>
<tr>
<td>5</td>
<td>LMS</td>
<td>LDAP/Banner</td>
<td>Course management and learning system that contains data entered by faculty, students, and staff categorized by course or organization. All courses and orgs that ever had a Blackboard presence continue to be preserved</td>
</tr>
<tr>
<td>6</td>
<td>OneCard</td>
<td>Banner</td>
<td>System that contains eligibility and enrollment information for WSU’s multi-purpose identification and debit card. Also maintains data such as cash balance associated with a One Card. Interfaces from Banner to One Card and from One Card to Banner.</td>
</tr>
<tr>
<td>7</td>
<td>Student Service Center - Salesforce</td>
<td>Banner</td>
<td>A system, hosted by the vendor that CRM for students and staff. System is fed by information from the Banner ERP system</td>
</tr>
<tr>
<td></td>
<td>Class Rosters</td>
<td>Banner</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Class Lists</td>
<td>Banner</td>
<td>Class Lists used by Faculty</td>
</tr>
<tr>
<td></td>
<td>Class Participation Confirmation</td>
<td>Banner?</td>
<td>Used by faculty to confirm course participation.</td>
</tr>
<tr>
<td>9</td>
<td>Grade Sheets</td>
<td>Banner</td>
<td>Early Assessment grades &amp; Final grades application - Banner Delivered</td>
</tr>
</tbody>
</table>
Getting it running

• Engage systems technicians (both programmers and supervisors)

• Make sure they talk to each other

• Test, test, test (including getting volunteers outside IT)

• A crucial system that makes a mistake could get everyone in trouble
Technical stuff you haven’t thought about

- Do you have a system of automatic assignment of names?
  - If so, how should it behave?
- Do any systems have limits on number of characters?
- What about non-ASCII (or whatever) characters?
Recommendations

• Take action!

• Institutions should adopt a policy for preferred name changes and procedures to support that policy.

• Strong campus identity and access management practices can help manage name changes from the IT system perspective.
Discussions at Your Table
Ongoing Efforts

ECAR Working Group on Gender Identity and Preferred Names
Thank You!!

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