

Navigating AI Policy, Privacy, & Procurement



Housekeeping

- ▶ Please use the Q&A feature to submit your questions. This is located on the ribbon below the speaker. The chat feature has been turned off.



- ▶ Your questions will be answered either in the Q&A feature in writing or live by our presenters
- ▶ All attendees will receive a link to this video recording as well as resources in a follow up email after the webinar.



Introductions



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Who is CITE?

- Non-Profit Membership Organization
- Established in 1960
- Supporting Technologists
- Rebranded to CITE in 2019
- Formerly CETPA - CA Educational Technology Professionals Association (2019)
- Formerly CEDPA - CA Educational Data Processing Association (2003)



AI Playbook:

5 Critical Moves for School Districts



1

Guiding Principles

2

Responsible Use Agreements

3

Instructional Technology Leaders

4

Student Data Privacy Policy

5

AI Literacy



AI Embedded in Everyday Tools



Siri





What is AI?

Generative Language:

Understand and create human language.

Learning:

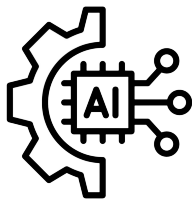
The AI gets better at a task over time as it processes more information.

Solving Problems:

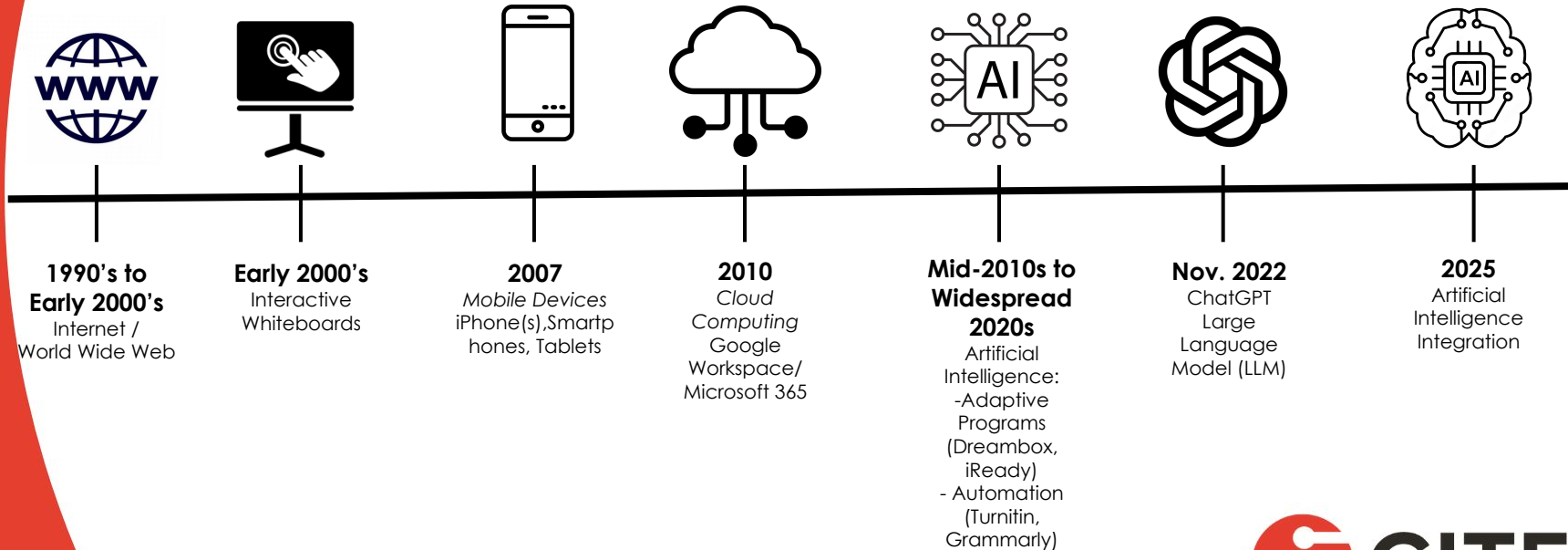
It can look at a situation and figure out solutions.

Making Decisions:

It can weigh different options and choose the best path.



The Evolution of Technology in Education: A Journey to AI



Real or AI quiz



Which image
best
represents
your current
feelings
towards AI in
Education?



Think about
your school
district,
which image
best
represents
**current
attitudes**
about AI in
Education?

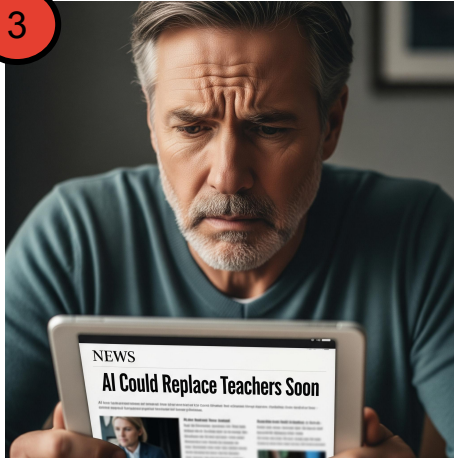
1



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3



4

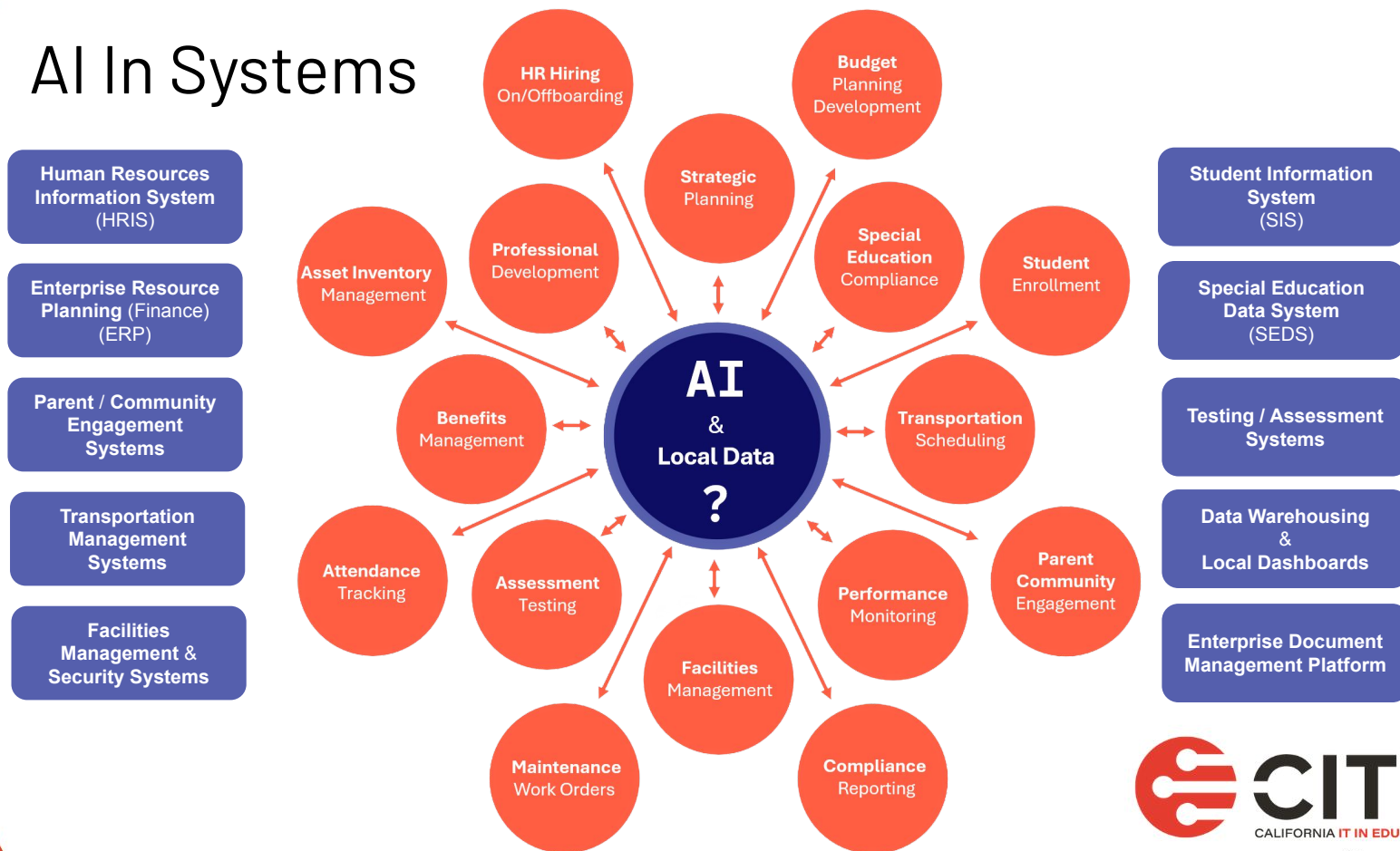


AI in District Systems: It's Already Here

- Important software and systems used in the classroom and back office will soon be AI-enabled
- SIS, ERPs, assessment, and online curriculum systems vendors will deploy AI agents and features directly into their applications
- These features will have access to some of the most sensitive data and will require extra attention to ensure student and staff privacy and safety



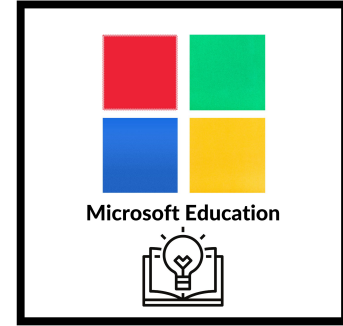
AI In Systems



AI in the Classroom



✦
Gemini



Copilot

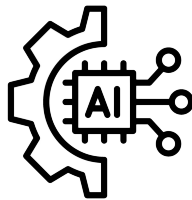


www.gemini.com

- **New Chat (Open Prompting):** Start fresh with any question or idea. Your blank canvas for AI interaction.
- **Deep Research:** Get comprehensive, synthesized information on complex topics, quickly.
- **Canvas:** An expansive, interactive space to develop and organize your ideas visually with AI.
- **Gems:** Save your best prompts and conversations for easy access and reuse.

**GAME
CHANGER**

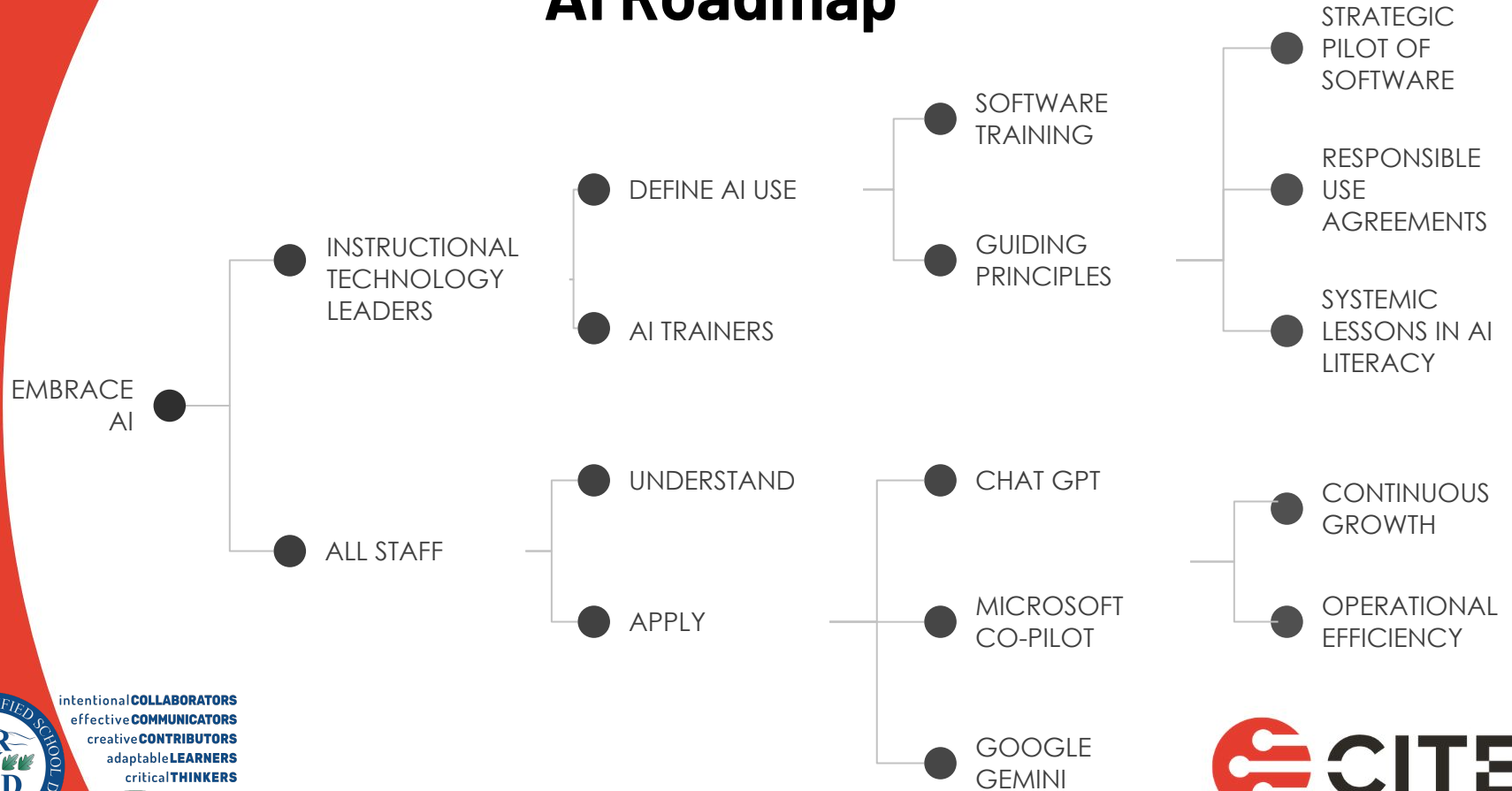




What aspects of Gemini do you find most compelling and would like to explore further?



AI Roadmap



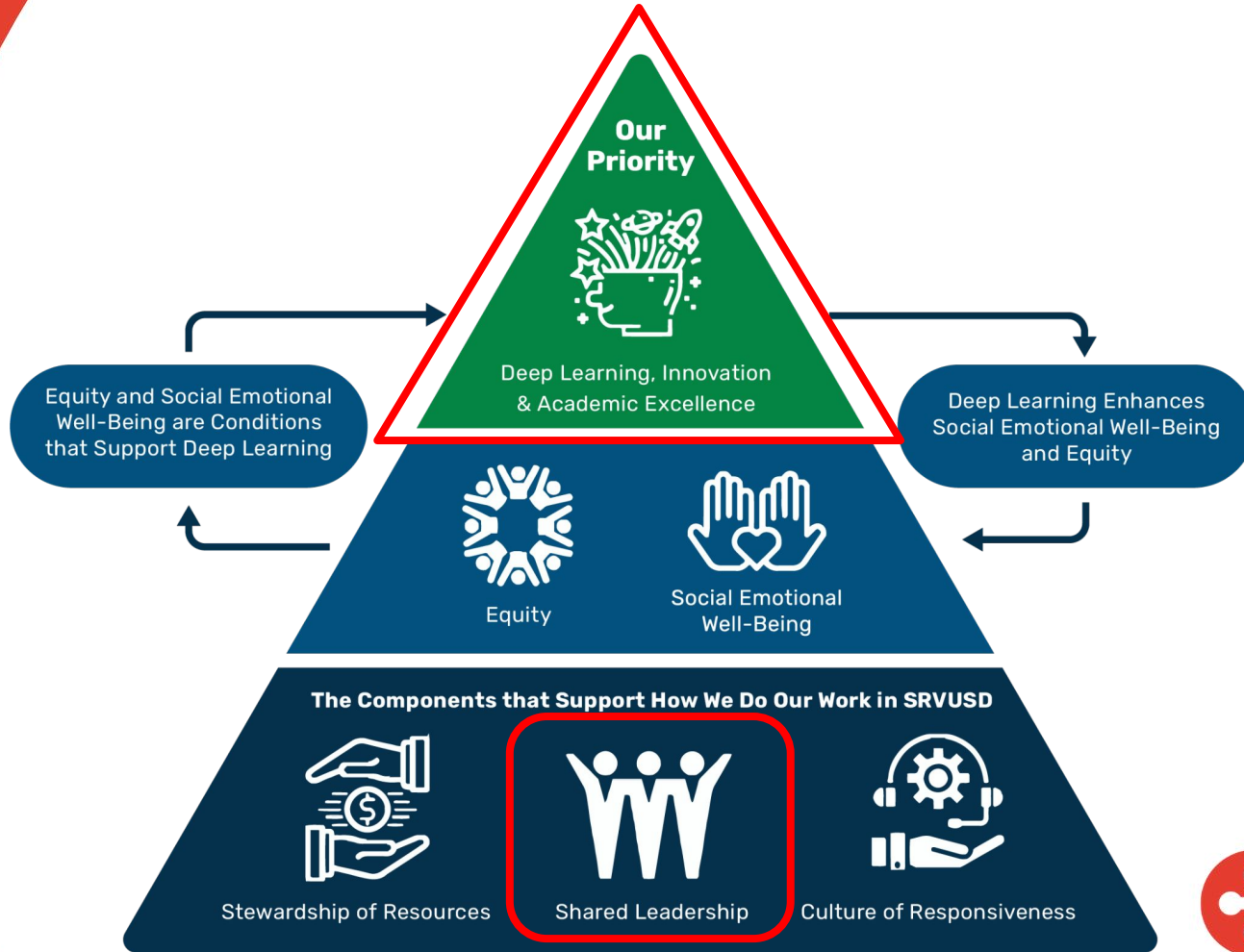
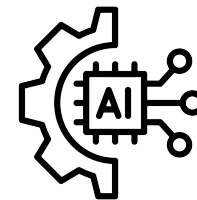
AI Playbook:

5 Critical Moves for School Districts



- 1 Guiding Principles
- 2 Responsible Use Agreements
- 3 Instructional Technology Leaders
- 4 Student Data Privacy Policy
- 5 AI Literacy





LEARNER PROFILE

When our students thrive, they will be:

Critical Thinkers

who apply their knowledge, skills and experiences to solve problems and actively seek out and listen to a variety of perspectives to draw informed conclusions.



Creative Contributors

who engage in problem solving, inquiry and innovative solutions to improve societal outcomes, demonstrate originality and imaginative ideas, and generate new and meaningful solutions.



Intentional Collaborators

who demonstrate the ability to work within a group to achieve common goals, integrate diverse perspectives and ideas, and enrich the learning of both self and others.



Adaptable Learners

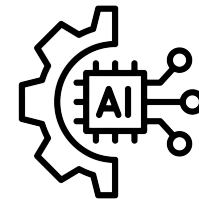
who demonstrate the ability to adjust to new situations, respond productively to feedback, and to empathize with diverse views.



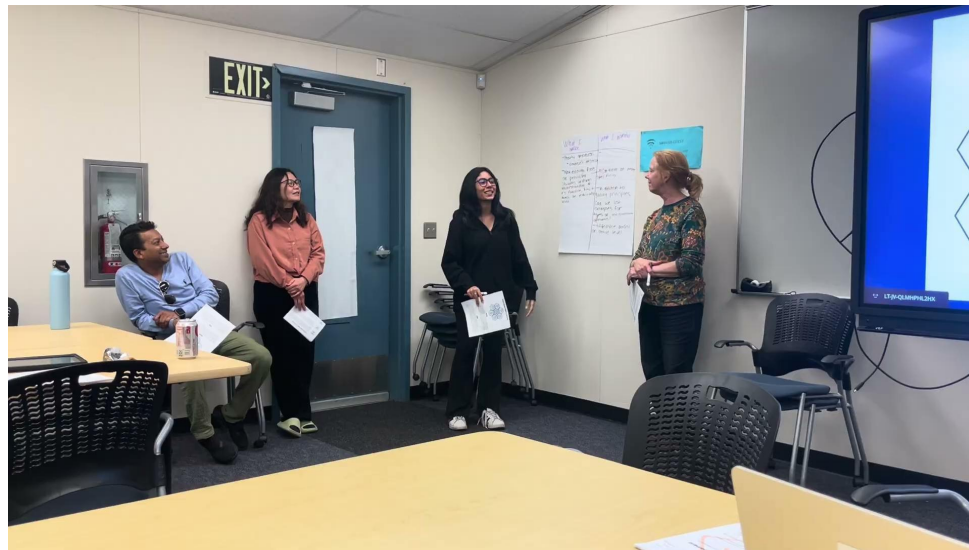
Effective Communicators

who articulate ideas clearly in a variety of forms and contexts, listen with empathy to decipher meaning and intentions, and demonstrate the ability to give presentations for a range of purposes and audiences.





SRVUSD Guiding Principles



Deep Learning Steering Committee Discussion
(Students and Parents)



AI Guidance for Schools

Potential benefits

- Content development and differentiation;
- Assessment design and timely, effective feedback;
- Tutoring and personalized learning assistance;
- Aiding creativity, collaboration, critical thinking, and agency skills development;
- Operational and administrative efficiency.

Potential risks

- Misinformation, errors, and academic dishonesty;
- Perpetuating societal biases and misinformation;
- Compromised student privacy and unauthorized data collection;
- Bullying and harassment;
- Diminished student and teacher agency and accountability;
- Overreliance on technology and less critical thinking.



AI Legislation: AI Literacy (AB 2876)

- AI Literacy bill signed September 2024 (AB 2876, amended E.C. 33548)
- Defines artificial intelligence, digital citizenship, and media literacy
- Directs Instructional Quality Commission (IQC) to incorporate media and AI literacy into the next curriculum adoption cycles

Read an article about AB 2876 at the QR code link



AI Literacy - AB 2876

- **Curriculum Framework Integration** - Mathematics, Science, and History-Social Science curriculum frameworks
- **Instructional Materials & Adoption Criteria** - When the State BOE next adoption for Math, Science, and History-Social Science
- **Implications for LEAs** - PD for AI literacy for teachers; Auditing and aligning current digital literacy programs to include AI components; Incorporating instructional materials that include AI ethics; Engage students around AI awareness, safety, and skills development



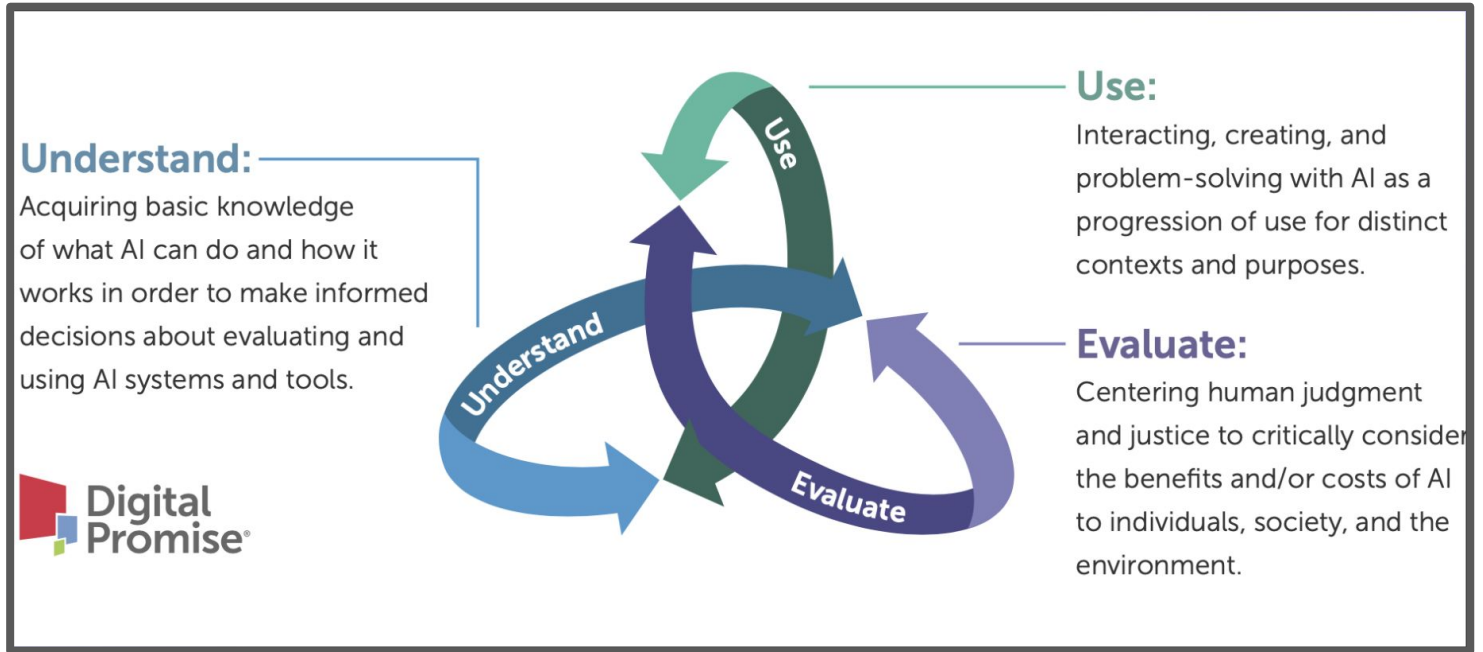
Staff & Student Training for AI Literacy

AI Literacy - 2876

AI literacy is defined as knowledge, skills, and attitudes needed to: Understand AI principles, concepts, and applications; use AI tools responsibly and effectively; recognize limitations, risks, and ethical implications of AI; think critically about AI's influence on society and daily life.



Understanding AI Literacy



Source: [Digital Promise](#)



AI Privacy & Process: Data Privacy Agreement & AI Addendum





RESOURCE: CA-National Data Privacy Agreement (NDPA)



The screenshot shows the CITE (California IT in Education) website. The header includes the CITE logo and navigation links: About, Membership, Communities, Groups, and Resources. The main content area features a section titled 'Recently Completed Agreements' with a sub-header 'See who has completed an NDPA with us'. Below this, a paragraph explains that the page offers a monthly updated list of recently completed CA-NDPAs and provides status updates for vendors currently in negotiations and those who have declined to sign. It also includes a link to 'privacyagreements@cite.org'. There are three expandable sections: 'In Negotiations' (with sub-sections 'Active Negotiations' and 'Inactive Negotiations'), 'Vendor Declined to Sign' (with sub-section 'Vendor Declined'), and 'Completed Agreements'. A footnote at the bottom states '* = Vendor Specific (modified agreement)'.

In Negotiations

Active Negotiations

- Assessment Technologies Institute, LLC dba National Healthcareer Association
- Care Solace, Inc.
- Clayful, Inc.
- Curriculum Associates, LLC
- EXSCO Information Services
- Glowforge
- Harris Systems, USA (MealTime)
- Kaseya Inc. (Backupify)
- LucidChart
- National Restaurant Association Solutions, LLC (ServSafe)
- Onshape, a business unit of PTC Inc.
- Project Lead the Way (PLTW)
- The Regents of the University of California; University of California, San Diego (UCSD)
- University of Oregon
- Venngage Inc.
- Zum Services, Inc.



www.cite.org/recently-completed-agreements

National Data Privacy Agreement (NDPA): AI

- ❑ What data is collected?
- ❑ How is the data used?
- ❑ Who owns the data?
- ❑ Data Mining
- ❑ Data Selling/Sharing
- ❑ Is the data the product?

CANDPA Exhibit
Version 1

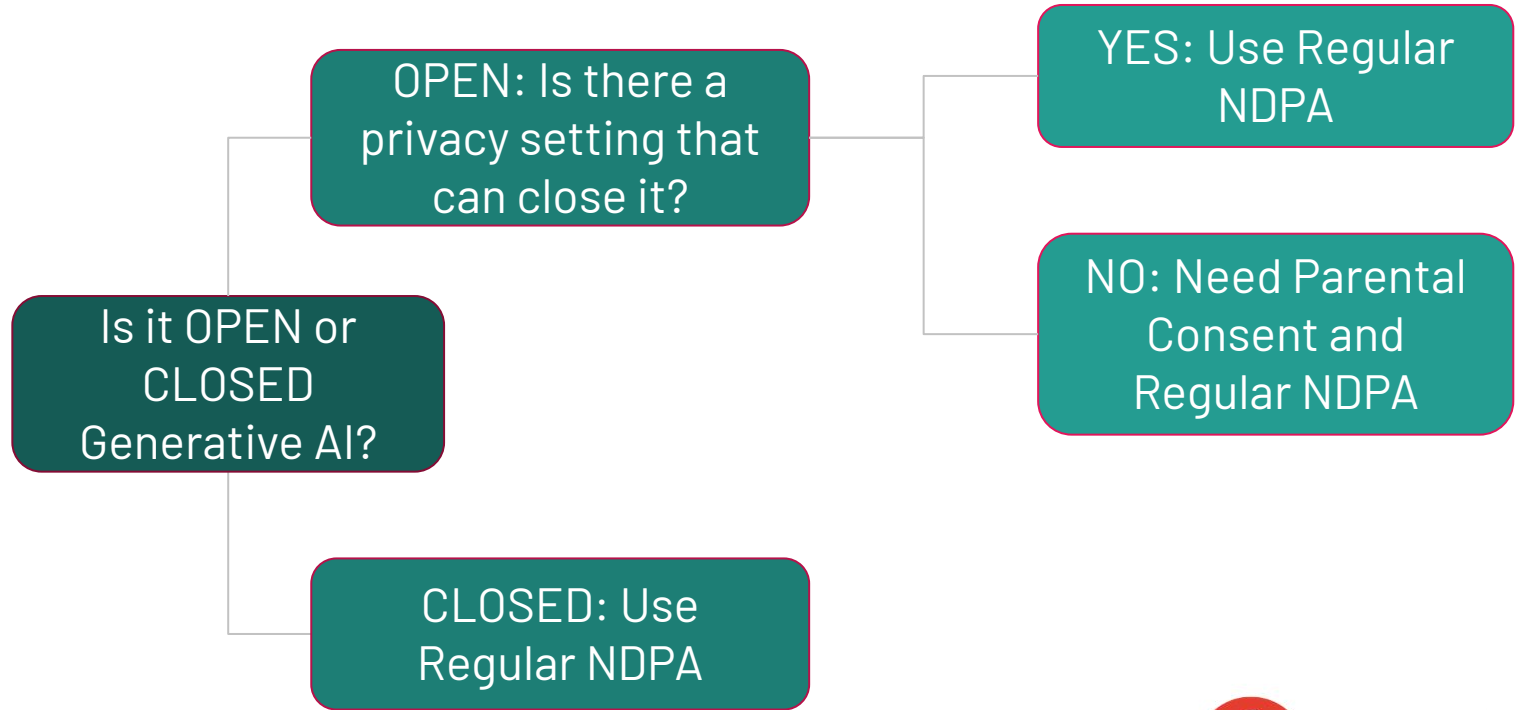
AI Addendum
(METHODS EMPLOYED BY THE AI)
The following information correlates to how the Provider will use AI in the delivery services to LEA.

Type of AI Used	Description/Common Uses	Optional	Required
Intelligent Tutoring Systems/agents (ITS)	Personalized instruction based on students' individual learning needs and progress		
Adaptive Learning/Assessment Platforms	Adjusts the difficulty level and content of learning materials based on the student's performance and learning pace		
Natural Language Processing (NLP)	Analyze and understand students' written or spoken responses, providing feedback or assistance in language learning tasks.		
Machine Learning-based Recommended Systems	Recommend educational resources, such as books, videos, or exercises, based on students' preferences, learning styles, and performance history.		
Virtual Assistants (i.e. Alexa, Siri, Merlyn Mind)	Provide automated and personalized support by handling tasks, answering questions, and managing workflows.		
Chatbots/LLMs (i.e. ChatGPT)	Facilitate automated and interactive communication; provides instant responses to questions and assists with various tasks through natural language processing.		
Data Analytics and Predictive Modeling	Analyze historical data and identify patterns to forecast future trends and inform strategic decision-making.		
Gamification and/or Personalized Learning Paths	Enhance engagement and optimize individual learning experiences by incorporating game-like elements and/or tailoring educational content to each learner's unique needs and progress.		
Computer Vision	Interpret, analyze, and generate visual data, mimicking human visual perception for applications such as image recognition, object detection.		

www.cite.org/stuprivacy



AI Data Flowchart



AI Organization Culture: AI Policies

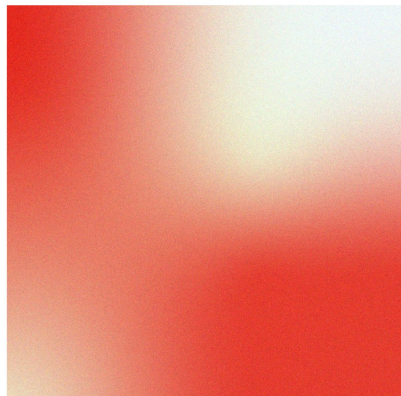


AI Policies: Elements

- Purpose
- Use in classroom and alignment with teacher practice
- District review process
- Academic integrity
- Digital citizenship and Cyber safety
- Alignment with state and federal laws



RESOURCE: Sample Policies



AI Resources Guide for IT Teams

SUMMER 2024



Sample Policy

USE OF ARTIFICIAL INTELLIGENCE (AI)

WHEREAS, Local Education Agency (“LEA”) has created the following policies for all employees who may have access to and/or utilize Artificial Intelligence (“AI”). These policies also apply to volunteers, coaches, and others who interact in an electronic format with students and employees of the LEA and its member school districts (“District”);

WHEREAS, the employee acknowledges that AI is intended for only professional and responsible use by employees and students;

NOW THEREFORE,

TERMS AND CONDITIONS OF THIS POLICY

Artificial Intelligence is a system of machine learning that is capable of performing complex and original tasks such as problem-solving, learning, reasoning, understanding natural language, and recognizing patterns in data. AI systems use algorithms, data, and computational power to simulate cognitive functions and make autonomous decisions, enabling them to perform a wide range of tasks and improve their performance over time through learning and adaptation.

The LEA recognizes that the use of AI can, when used appropriately, enhance student learning by improving the efficiency of education, providing new and creative ways to support learning, and encourage independent research, curiosity, critical thinking, and problem-solving.

The LEA authorizes staff members to utilize and permit students to utilize ethical and legal use of AI as a supplemental tool to support and expand on classroom instruction, facilitate personalized learning opportunities, and increase educational and learning opportunities, in accordance with the



Employee AUPs

- Identify purpose & scope of AI Use
- Responsible Use and Professional Standards
- Data Privacy and Confidentiality
- Transparency and Disclosure
- Limitations and Prohibited Uses



Sample Insert into Employee AR or Acceptable Use of Technology Policy

Use of Artificial Intelligence

Artificial Intelligence ("AI") is a system of machine learning that is capable of performing complex and original tasks such as problem solving, learning, reasoning, understanding natural language, and recognizing patterns in data. AI is becoming more prevalent in our daily lives and is being integrated in a variety of technical applications. The District recognizes that the use of AI can enhance student learning experiences and be a resource for staff and teachers. The District authorizes the ethical and legal use of AI as a tool to support and expand on classroom instruction, increase learning opportunities, and as a general tool for staff and teachers subject to limitations listed within this policy and any other applicable Board Policies.

The District may consider whether the adoption of a particular open AI tool may have a significant impact on the terms and conditions of employment for its staff, such that the District may be obligated to negotiate the effects with a collective bargaining unit.

The District has developed the following guidelines and protocols for employee use of AI:

1. Before allowing students to use a specific AI platform in the classroom and before using an AI tool as a resource, employees should ensure that the AI system has been vetted and approved by the District or otherwise meets the District's safety standards.
2. When applicable, the District should attain parental consent before offering certain open AI services to students.
3. Evaluation of an AI tool may include whether it:
 - a. is an open or closed environment for purposes of data collection;
 - b. has a privacy setting where data resharing can be limited or blocked;
 - c. meets current student data privacy standards;
 - d. can be offered in an equitable manner;



Student AUPs

- Purpose of AI Use in Learning
- Academic Integrity and Authorship
- Acceptable and Unacceptable Use
- Privacy and Data Protection
- Device and Platform Guidelines
- Digital Citizenship and Ethical Use

Use of Artificial Intelligence

Artificial Intelligence ("AI") has become increasingly prevalent in many areas, including the education sector. The use of AI can, when used appropriately, enhance student learning by improving the efficiency of education, providing new and creative ways to support learning, and encourage independent research, curiosity, critical thinking, and problem solving. AI has the potential to serve as a supplemental tool to support and expand on classroom instruction, facilitate personalized learning opportunities, and increase educational and learning opportunities.

The District has developed the following guidelines and protocols for the use of AI:

1. Any use of AI in the classroom or on class assignments must align with the teacher's instructions and use expectations.
2. Any student use on AI on schoolwork must be cited to as any other source and may not be submitted as the student's original work.
3. Students should not rely on AI tools as a fact-checker to confirm their work or research as AI may not always provide accurate or up-to-date information.
4. Students are prohibited from using any AI system to access, create, or display harmful, deceptive, or inappropriate matter that is threatening, obscene, disruptive, or sexually explicit, or that could be construed as harassment or disparagement of others based on their race/ethnicity, national origin, sex, gender, sexual orientation, age, disability, religion, or political beliefs or interact with the AI in a manner that supports any of the above.
5. Students shall not share confidential information or personally identifiable information with an open AI system of themselves, another student, staff member, or other person. Personally identifiable information includes, but is not limited to, a person's name, address, email address, telephone number, Social Security number, or other personally identifiable information.
6. Students shall not adjust any privacy settings on an AI tool unless directed to do so by a teacher or staff member.

Students are not permitted to access AI for assistance with assignments or research unless done under the guidance and approval of a District staff member. Unpermitted use of AI may lead to penalties for academic misconduct. Inappropriate use may also result in disciplinary action and/or legal action in accordance with the law and Board Policies.



Guidelines for Classroom AI Use

Instructional Technology Leaders

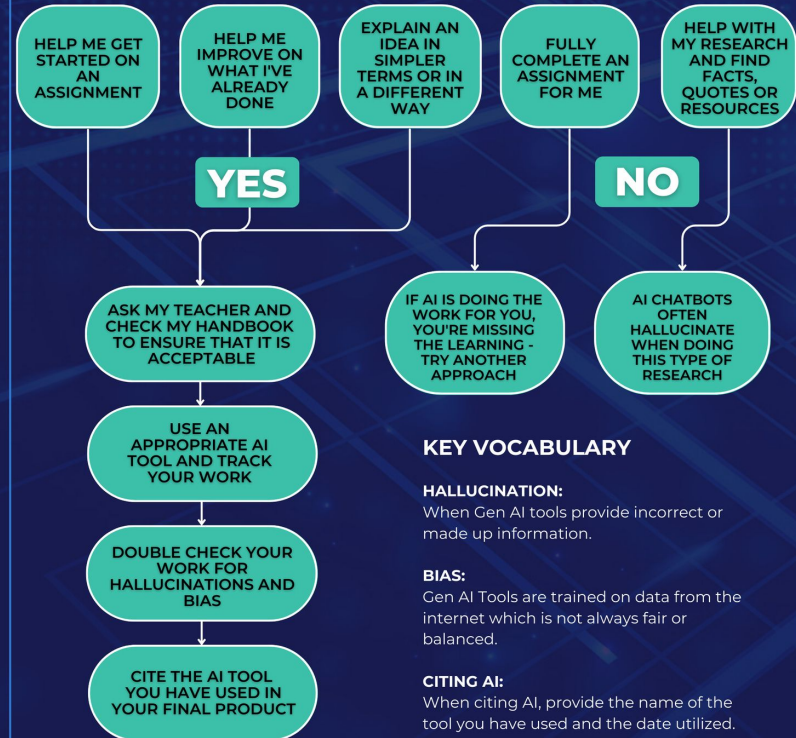
- [Year 1](#)
- [Year 2](#)

Responsible Use Agreements

AI for Education

A GUIDE FOR STUDENTS: SHOULD I USE AI?

Why do you want to use an AI Chatbot? *I want it to...*



AI Policies

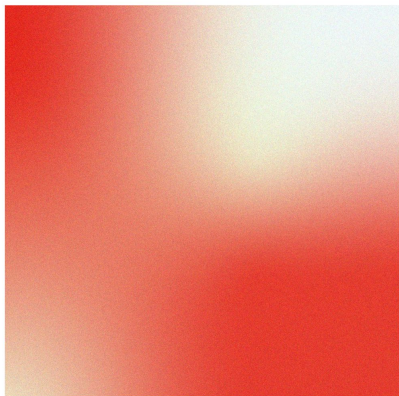
- CSBA Policies with AI Content
 - BP/E 4040 - Employee Use of Technology
 - BP/E 6163.4 - Student Use of Technology
 - BP 5131.9 - Academic Honesty
 - BP 6154 - Homework and Makeup Work
 - BP 6162.5 - Student Assessment
- CSBA AI Taskforce: Promising Practice Examples



AI Privacy & Process: Technology Department Questions



RESOURCE: Technical Checklist for AI



AI Resources Guide for IT Teams

SUMMER 2024

AI RESOURCES GUIDE FOR IT TEAMS 7


Technical Checklist for AI


Special thanks to the San Bernardino Superintendent of Schools for their work on this checklist.


- ☐ Has the application been vetted by LEA leadership for alignment with instructional and organizational goals?
- ☐ Has the LEA reviewed the vendor's Terms of Service (TOS) to ensure compliance (i.e., if intended users are students, does the vendor prohibit children under the age of X from using the applications)?
- ☐ Does the LEA have board policy, administrative regulations, and general guidelines regarding the use of AI?
- ☐ Does the staff AUP include guidance about appropriate use of AI, including language about secure and safe data sharing practices?
- ☐ Is the product hosted or on-premises?
- ☐ If hosted, has the vendor signed LEA's data privacy agreement? If not and unwilling to do so, consider parent waiver.
 - Has the vendor detailed how LEA provided data (user prompts, supplied data, generated output etc.) will be used for training and tuning?
 - Has the vendor confirmed that any user-provided data (user prompts, supplied data, generated output, etc.) will remain the property of the LEA and that no LEA data will be retained past the timeline specified in the privacy agreement and/or terms of service (TOS)?
 - Has the vendor confirmed that any user-provided data (user prompts, supplied data, generated output, etc.) will remain the property of the LEA and that no LEA data will be retained past the timeline specified in the privacy agreement and/or terms of service (TOS)?
 - Does the vendor's privacy policy address FERPA, SOPIPA, COPPA, CCPA, and any AI specific laws?
- ☐ If hosted, what firewall and filtering changes will be necessary?
- ☐ If hosted, do you need to make changes to your PAT or NAT pools to ensure on your firewall to ensure uninterrupted access?
- ☐ If hosted, does the application support SSO or federated loggings for easy account management? If not, how will the LEA manage accounts?
- ☐ Are existing user devices compatible with and capable of supporting the application?
- ☐ If hosted, does the application require a cell phone to register an account (ChatGPT)? If so, how will the LEA manage registration? Consider involving HR early to address any bargaining unit issues that may come up from the use of personal devices.
- ☐ If hosted, does the application require a cell phone to register an account (ChatGPT)? If so, how will the LEA manage registration? Consider involving HR early to address any bargaining unit issues that may come up from the use of personal devices.
- ☐ If hosted, how is billing handled? PO? Credit card, on an account-by-account basis? If a credit card is the only option, consider involving Purchasing and Business Services to discuss challenges with billing management.



Technology Department Questions

 “Does the vendor’s Terms of Service meet federal and state student data privacy requirements (FERPA, COPPA, SOPIPA, CCPA)?”

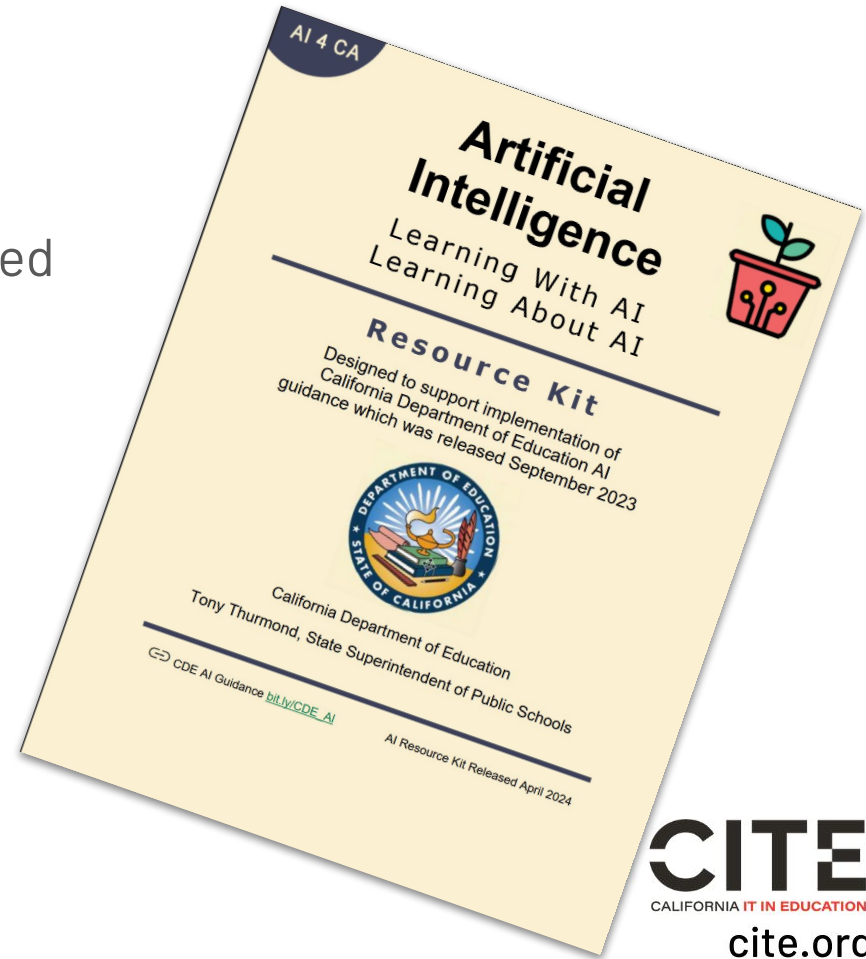
 “Has the district reviewed existing tools that now include AI features to ensure new functions are covered by prior approvals or data agreements?”

 3. “Does the tool support API integrations, and how often does it pull data from source systems (e.g., SIS, LMS)?”



State Guidance

- California Department of Education guidance released early 2024



State Guidance

- Nearly two dozen webinars covering topics such as accessibility, prompting, workflows, and more



Artificial Intelligence



Learning With AI
Learning About AI



Fundamental Skills For Educators & Students



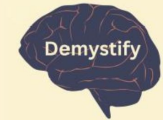
Review AI data collection, user privacy



Leverage AI capabilities, critique inaccuracies



Consider presence of bias, societal impacts of AI



Build understanding of how AI systems work



What Should You Do Next?

The best first step someone can take after attending a conference session about privacy and AI use in the classroom is to conduct a needs assessment in their school district. This process involves identifying specific challenges, goals, and areas where AI can be implemented, all while aligning with privacy concerns. Here's a breakdown of the steps:

1. **Assess District Needs and Goals:** Review the current challenges in the district (e.g., personalized learning, administrative tasks, student performance tracking) and see where AI could provide value.
2. **Evaluate Privacy Concerns and Guidelines:** Ensure that any AI tool or platform complies with privacy laws such as FERPA (Family Educational Rights and Privacy Act) or GDPR (if applicable), and that the district has a clear data privacy policy.
3. **Engage Stakeholders:** Involve teachers, administrators, IT staff, and parents in discussions about the potential use of AI. Their input will be crucial in making informed decisions and ensuring transparency.
4. **Pilot a Small Project:** Start with a small, manageable pilot project that uses AI for a specific purpose, such as an AI tool for grading or a personalized learning program. This will allow the district to test the technology and see how it works in practice while keeping privacy at the forefront.
5. **Develop Training and Support:** Ensure that teachers and staff are properly trained on how to use AI tools in the classroom, while also providing guidance on privacy best practices.

Taking this methodical approach helps ensure that AI is introduced thoughtfully, balancing innovation with the necessary safeguards around student privacy.

Use Q&A Functionality

***What questions do you have
remaining about AI, policy, privacy,
and procurement?***



Thank You!



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Navigating AI Policy, Privacy, & Procurement



AI Legislation: Governor Executive Order

- Executive Order N-12-23 required state agencies to analyze and issue guidance on multiple areas related to AI, including:
 - Cyber risk assessment
 - Procurement blueprint
 - State employee training
 - Ongoing evaluation of AI impacts on state departments and the agencies they oversee

Read the full order at the QR code link

