

**Information Organization, Usability, Currency & Accessibility (IOUCA)  
Working Group**

California Portal Steering Committee

**Date:** March 7, 2006

**Time:** 9:00 – 11:00 a.m.

**Location:** LC II, Room 340

**Attendees:**

- |  |  |  |
|--|--|--|
| <input checked="" type="checkbox"/> Neal Albritton (DOR)   | <input type="checkbox"/> Steve Branson (DHS)               | <input checked="" type="checkbox"/> Steve Clemons (CEAP)   |
| <input type="checkbox"/> Mary Fernandez (SPB)              | <input checked="" type="checkbox"/> Donna Freeman (FTB)    | <input checked="" type="checkbox"/> Theresa Giles (DHS)    |
| <input checked="" type="checkbox"/> John Jewell (CSL)      | <input checked="" type="checkbox"/> Patrick Johnson (DOR)  | <input checked="" type="checkbox"/> Anamarie Malone (DTS)  |
| <input checked="" type="checkbox"/> Liz Mechem (Insurance) | <input checked="" type="checkbox"/> Claudina Nevis (SCIO)  | <input checked="" type="checkbox"/> Kristine Ogilvie (CSL) |
| <input type="checkbox"/> Rob Quigley (SCIO)                | <input checked="" type="checkbox"/> Deborah Schwartz (CRB) |  |

**Review Minutes from Previous Meeting**

**Debbie Schwartz**

The minutes for the February 28<sup>th</sup> meeting were approved with no corrections. Debbie thanked Kris Ogilvie for taking notes at the meeting. It was noted that some action items marked due on March 7 would not be completed but would have updates. Debbie will note (update) after due date where appropriate.

**Recommendation on FTB Template**

**Working Group**

Claudina noted that the State CIO would like a status update on the IOUCA review of FTB's template at Friday's Review Board meeting. John Jewell or Kris Ogilvie will provide a high-level overview with detail provided by Richard Devylder for accessibility and Donna Freeman for usability.

**Accessibility:** Neal was still unable to access the template files through email due to conflicting security policies between DTS and DOR. Anamarie provided the templates and all supporting files on a cd. Neal will complete the preliminary review of the files by the March 14<sup>th</sup> meeting.

**Usable by Developers:** All Dreamweaver code has been removed from the html version by DTS staff.

**Usability:** Donna emailed a list of HFI recommendations and noted where FTB is in the process of implementing those recommendations. Parts of the list are duplicative; Donna will clean up the list and post it to the working group website by March 14<sup>th</sup>.

**New Design Procedure:** FTB is using their design effort as a proof of concept for the new design procedures developed by the working group. Donna is assembling the timeline. She noted that FTB followed a similar process to the proposed procedure. The primary differences were that the initial concept information was provided through an email note rather than a formal document and that approval was given by the State CIO rather than the State Portal Steering Committee with recommendations by the State Portal Review Board and the IOUCA Working Group. The team agreed to amend the procedure to allow for information reporting of concept information through email.

**Outstanding Questions:** The graphics-based template proposed by FTB may not be usable by departments that don't have advanced graphics software or expertise. Such departments would not be able to change the template to meet the unique needs of their department and audience(s). Donna sent a message to her technical staff asking if it would be feasible to develop an alternative; she has not received a response. The issue will be noted at the Portal Review Board meeting on March 10<sup>th</sup>, but the IOUCA will not be prepared to make a recommendation for

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resolution until after further research and discussion. We will ask other departments if they have faced this issue, how they resolved it, and what lessons they learned from the process.

**Top Level Standards, Guidelines, and Best Practices** **Working Group**

The team agreed that once the standards have been defined, we would determine how they should be communicated to departments and implemented. We will also need to address how standards should be communicated to consultants to ensure that accessibility, usability, and findability are designed in to any new website designs. We will need to identify recommendations for communication and training after the standards, guidelines, and best practices have been selected by the Portal Steering Committee and on an ongoing basis. It was noted that we might want to look into using GTC, Executive Institute, and CIO Academy as vehicles for ongoing training; Claudina and Liz will follow up.

**Accessibility:** Neal has a couple of items left to incorporate into the accessibility standards; he plans to have the final draft to the working group on Thursday, March 9.

**Usability:** Donna is waiting to hear back from HFI; she used recommendations from the HFI report to develop usability standards and guidelines but needs HFI approval to ensure there is no copyright issue. She has also asked permission to use HFI's usability checklist. She will follow up with HFI.

**Findability:** The working group agreed that findability should be addressed later in the process. It will be removed from the agenda for at least two weeks; the team will reassess the timeline at the March 28<sup>th</sup> meeting.

**Proof of Concept Using SCIO Templates** **Donna, Anamarie, Claudina**

Donna, Anamarie, and Claudina will meet next week to discuss how to conduct the proof of concept. Debbie will schedule the meeting and facilitate. The working group agreed that a representative from DOR should be included early in the process, but did not need to attend the initial planning meeting. Neal asked John to send him an email emphasizing the importance of DOR's involvement in the proof of concept; John will do so.

The proof of concept will be noted at the Portal Review Board meeting on Friday March 10.

**Open Forum – Recommendations From Team** **All**

DOR informed the team about the California Web Accessibility Conference scheduled April 6-7 in San Francisco. They felt it might offer valuable training to IOUCA members and department webmasters. *Note: The conference sold out on Wednesday March 8.*

The IOUCA working group website hosted by FTB has been updated.

Claudina asked to post the working group information on the State CIO's website; the working group agreed. The working group agreed to post the charter, member list, meeting schedule, meeting agendas, and meeting minutes on the site. Debbie will send documents to date to Claudina and Anamarie for posting. Anamarie will post future documents on receipt; meeting minutes will be posted one week late to allow for working group approval prior to posting.

Claudina met with Dan Whetstone, leader of DTS' Portal Redesign Project, on March 6<sup>th</sup>. Dan is interested in IOUCA's activities. John, Kris, and Debbie will meet with Dan next week. Debbie will add him to the working group meeting invitations.

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It was noted that many of the document formats (html, PDF, Word) used on state websites are not completely accessible. For instance, PDF's are not accessible by low-vision users. XML and html documents are accessible. The working group agreed that we might need to establish a process to help departments identify and prioritize documents that need to be reformatted to make them accessible to all users. It was noted that technologies exist that convert PDF's to html or XML. The team agreed to identify formats currently being used on California web pages, note which formats are completely accessible, and identify conversion options for formats that are not completely accessible.

The working group also agreed that we should look at applications as well as pages. Standards should be established to ensure consistency in scripting language and accessibility of applications. We will establish a subgroup later in the process to consider standards for common language (thesauri), navigation, look-and-feel, user interface, and security features. The subgroup may include experts from outside the working group. Steve will frame the issue for further discussion. We also briefly discussed the issue of online forms; Steve will frame this issue and conduct high-level research.

On March 3, 2006 Claudina, John, Steve, Kris, and Debbie participated in a conference call with Paul Taylor and Cathilea Robinett from the Center for Digital Government. The discussion focused on state portals in the context of California's current redesign efforts. Debbie will provide a copy of the conference call notes to the IOUCA working group for informational purposes.

**Open Issues**

**Debbie Schwartz**

1. How can the state design templates for current technology standards while accommodating departments with a wide range of expertise and software tools?

**Action Items**

**Kris Ogilvie**

***ACTION:** Complete the preliminary accessibility review of the FTB templates.*

***Assigned To:** Neal Albritton*

***Due:** March 14, 2006*

***ACTION:** Complete the detailed accessibility review of the FTB templates.*

***Assigned To:** Neal Albritton*

***Due:** March 14, 2006 (Update)*

***ACTION:** Post amended list of usability recommendations and FTB's implementation status on working group website.*

***Assigned To:** Donna Freeman*

***Due:** March 14, 2006*

***ACTION:** Amend the proposed procedure for submitting new website designs to allow for informal email reporting of initial concept information.*

***Assigned To:** Debbie Schwartz*

***Due:** March 14, 2006*

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**ACTION:** *Notify the State Portal Review Board of the issue surrounding how to design templates for current technology standards while accommodating departments with a wide range of expertise and software tools.*

**Assigned To:** *John Jewell or Kris Ogilvie*

**Due:** *March 14, 2006*

**ACTION:** *Complete the accessibility Guidelines*

**Assigned To:** *Neal Albritton and Patrick Johnson*

**Due:** *March 14, 2006*

**ACTION:** *Draft usability standards, guidelines, and best practices.*

**Assigned To:** *Donna Freeman*

**Due:** *March 14, 2006 (Update)*

**ACTION:** *Schedule meeting with Anamarie, Claudina, and Donna to discuss SCIO proof of concept.*

**Assigned To:** *Debbie Schwartz*

**Due:** *March 14, 2006*

**ACTION:** *Send an email to Neal emphasizing the importance of DOR's involvement in the proof of concept.*

**Assigned To:** *John Jewell*

**Due:** *March 14, 2006 (Update)*

**ACTION:** *Follow up on the feasibility of using GTC, Executive Institute, and CIO Academy as vehicles for ongoing training.*

**Assigned To:** *Claudina Nevis and Liz Meecham*

**Due:** *March 14, 2006 (Update)*

**ACTION:** *Send the IOUCA working group charter, member list, meeting schedule, meeting agendas, and meeting minutes to Claudina and Anamarie for posting on the State CIO website ([www.cio.ca.gov](http://www.cio.ca.gov)).*

**Assigned To:** *Debbie Schwartz*

**Due:** *March 14, 2006*

**ACTION:** *Meet with Dan Whetstone to discuss IOUCA and PRP.*

**Assigned To:** *John Jewell, Kris Ogilvie, and Debbie Schwartz*

**Due:** *March 14, 2006*

**ACTION:** *Add Dan Whetstone to the IOUCA working group meeting invitation.*

**Assigned To:** *Debbie Schwartz*

**Due:** *March 14, 2006*

**ACTION:** *Identify formats currently being used on California web pages.*

**Assigned To:** *Steve Clemons*

**Due:** *March 14, 2006 (Update)*

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***ACTION:*** *Using the list of formats currently being used on California web pages, note which formats are completely accessible, and identify conversion options for formats that are not completely accessible.*

***Assigned To:*** *Steve Clemons and Neal Albritton*

***Due:*** *March 21, 2006 (Update)*

***ACTION:*** *Frame the issue of application accessibility and usability.*

***Assigned To:*** *Steve Clemons*

***Due:*** *March 14, 2006 (Update)*

***ACTION:*** *Conduct high level research and frame the issue of accessibility and usability in regards to online forms.*

***Assigned To:*** *Steve Clemons*

***Due:*** *March 14, 2006 (Update)*

***ACTION:*** *Provide a copy of the notes from the conference call with Center for Digital Government.*

***Assigned To:*** *Debbie Schwartz*

***Due:*** *March 14, 2006*

**Next Steps**

**Kris Ogilvie, Debbie Schwartz**

Next IOUCA Meeting: March 14, 2006

OPR (1400 Tenth Street), Room 202  
9:00 – 11:00 a.m.