

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

California Portal Steering Committee

Date: April 4, 2006

Time: 9:00 – 11:00 a.m.

Location: LC II, Room 340

Attendees:

<input checked="" type="checkbox"/> Neal Albritton (DOR)	<input checked="" type="checkbox"/> Shayn Anderson (EDD)	<input checked="" type="checkbox"/> Steve Branson (DHS)
<input type="checkbox"/> Steve Clemons (CEAP)	<input type="checkbox"/> Mary Fernandez (SPB)	<input checked="" type="checkbox"/> Donna Freeman (FTB)
<input 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"/> Joni Ogata (DMHC)	<input type="checkbox"/> Kristine Ogilvie (CSL)	<input type="checkbox"/> Rob Quigley (SCIO)
<input checked="" type="checkbox"/> Deborah Schwartz (CRB)	<input type="checkbox"/> Rick Vagg (DTS)	<input type="checkbox"/> Dan Whetstone (DTS)
<input checked="" type="checkbox"/> Loren Weatherly (Visiting, EDD)		

Review Minutes from Previous Meeting

Debbie Schwartz

The minutes for the March 21st meeting were approved with one change. In the section addressing accessibility standards, the minutes incorrectly noted a previous decision to list *all* W3C Priority Level 2 items as guidelines. The actual decision was to include all Level 2 items as standards *except* two guidelines related to style sheets. The minutes were revised.

The minutes for the March 28th meeting were approved with no changes.

IT Leaders Meeting

Claudina Nevis

The IT Leaders meeting discussed at the March 28th meeting has been scheduled for April 28, 2006 at McGeorge Law School. The meeting will be held in one of the large classrooms that can accommodate up to 300 people. Claudina is developing the agenda; Steve Branson will provide verbiage for the agenda item and part of the accompanying email addressing IOUCA to gain the attention of webmasters.

The working group reviewed a draft presentation created by Debbie as a straw man for discussion. The group agreed that the actual presentation should include the following:

1. A high level briefing about the workgroup focused on CIO's and AIO's.
 - What are we doing?
 - What are we not doing?
 - Who is involved?
 - What is our objective and how will we meet it?
2. A more technical portion focusing on style sheets to encourage webmasters to attend the meeting.
 - Include presentation to show the simplicity and benefits of CSS
 - Address conversion issue
3. Notification of upcoming Section 508 training and ongoing training opportunities.
4. Sample of a proposed standard showing a possible format.
5. Planned proof of concept
 - State CIO website plus another site
 - Apply the standards we are recommending
 - Note lessons learned and revise standards or training as needed
 - Develop metrics

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Portal Steering Committee Meeting

Claudina Nevis, John Jewell

The State Portal Steering Committee meets on April 14, 2006. The question was raised whether the IOUCA wants to present recommendations on the accessibility standards at that meeting. After discussion, it was determined that the IOUCA needs to present recommendations to the Review Board for feedback before the Steering Committee. The process is in place and ought to be followed. By presenting to the Review Board first, the participating CIO's and their webmasters will have time to consider the proposed standards and make recommendations to their directors.

Presentation – Cascading Style Sheets

Steve Branson

Steve showed the working group the benefits, effectiveness, and relative ease of use associated with cascading style sheets (CSS or style sheet). Using FrontPage, he took a simple bulleted list and manipulated its presentation using style sheet coding.

CSS can be internal or external to a web page. For accessibility purposes, external style sheets should be used. If external style sheets are used on a website, the webmaster is able to update all pages using the style sheet by updating the single style sheet rather than each individual page. This can offer valuable time and resource savings.

CSS allows the web developer to apply pre-set styles and attributes to a page including but not limited to color, font, font size, borders, shading, and textures. Text and images are fed to the web through the CSS. The developer is able to change the appearance of a page (or part of a page); the location of features on a page, the style of the page (e.g., tabbed navigation links), and what content appears on the page. If all templates used an consistent identification system for components (header, footer, navigation, content), style sheets could be developed for each component that would function with all templates. Another option would be to develop a single template with multiple style sheets to provide agencies look and feel options.

Multiple style sheets can be linked to a single page. For instance, a page may be linked to one style sheet for screen viewing, but another for printing. Developers are able use style sheets to encode printer friendly versions of pages; the style becomes active when the page is printed.

Style sheets can enhance accessibility through styles such as relative sizing and fonts that enable users to change font size. In elastic design, style sheets can be set so images and borders expand and contract to reflect font size – if font size increases, so do the images and border. It was noted that a number of people in the accessibility community either turn off style sheets on web pages they dislike or replace the style sheets with their own.

Steve noted that the web designer community has created websites such as Zen Gardens, where visitors are able to develop and display a single web page using their style sheets (www.csszengarden.com).

The question was raised – why would a developer *not* want to use style sheets? The two main reasons identified were related to a lack of understanding and a lack of training. The primary issues surrounding CSS are training and conversion. Conversion will be a difficult process for agencies that are not currently using style sheets. Those agencies will be required to strip out tables and add code to pages. This will require resources that are already strained in many departments. The IOUCA needs to identify an approach that takes the challenges of conversion into consideration. For instance, we could require that departments redesigning their site or developing new web centers use the templates and style sheets.

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Best Practice: Develop master templates in Dreamweaver and FrontPage incorporating the style sheets and locking down all but the content areas.

ACTION: *Document the CSS recommendation for working group review and approval.*

Assigned To: *Debbie Schwartz*

Due: *April 11, 2006*

Open Forum – Recommendations From Team

All

1. Design Media, the vendor hired by Department of Rehabilitation to provide Section 508 training to state webmasters, has agreed to evaluate up to 12-15 proposed templates for accessibility. Franchise Tax Board is working on an RFO for usability testing of the new taxes.ca.gov site. Claudina will talk to Clark to see if we want to ask FTB to extend the contract to include usability reviews of the proposed templates.

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?
The Review Board noted that some content management solutions can resolve this issue, but not all departments have strong content management systems in place. DTS is considering offering support. It was recommended at the IOUCA meeting on March 14th that we consider offering a resource gallery of images that can be used by any state department. It would be possible to offer a suite of templates using different color palettes that meet accessibility requirements. Before this can be decided, the issue of single look-and-feel for all California pages vs. multiple look-and-feel with common branding needs to be resolved at a higher policy level.
2. How can California enforce the standards after adoption?
California will likely approach adoption from an incentive perspective rather than an enforcement perspective. An exception is Section 508 compliance, which is mandated by state and federal law.
3. Should tools to implement standards (CSS, templates) be developed for current look and feel as well as new look and feels?
4. Guidelines are not always followed. Would it be better to develop standards only, but drive by level of compliance? For example,
 - Level 1 Standards: Minimal accessibility
 - Level 2 Standards: Moderate accessibility
 - Level 3 Standards: High accessibilityDepartments could be encouraged to work toward improving their websites by qualifying for higher levels. The state could provide “paths to accessibility” and could provide training for each level.

Action Items

Kris Ogilvie

ACTION: *Prepare a plan to establish ongoing communication with webmasters; may want to organize along the lines of the federal government’s content managers forum.*

Assigned To: *John Jewell, Anamarie Malone, Rick Vagg*

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Due: April 25, 2006

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

Assigned To: *John Jewell, Claudina Nevis*

Due: *April 11, 2006*

Update: *John spoke to Richard at DOR; Richard outlined his preferred approach. The letter will be sent by Clark Kelso.*

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

Assigned To: *Steve Clemons, Debbie Schwartz*

Due: *April 18, 2006 (Update)*

Update: *The topic of current formats used on web pages (and their associated accessibility) such as word, adobe, etc. is much more difficult to assess than originally thought. If you look at any of the applications such as word or Adobe, they will document that their applications are all accessible if used correctly. The team agreed that a list of file types being used will be helpful; accessibility of those file types will be addressed separately. Debbie will ask Steve to provide the list of file types and versions (if readily available) being used.*

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

Assigned To: *Steve Clemons*

Due: *April 18, 2006 (Update)*

Update: *I anticipate that this topic should be outside the scope of the IOUCA at this point and will have to be a part of the application architecture that we are in the process of developing. There was some disagreement with this assessment in the working group. Kris and Debbie will meet with Steve to discuss how IOUCA can work with CEAP on the issue.*

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

Assigned To: *Steve Clemons*

Due: *April 18, 2006 (Update)*

Update: *Kris and Debbie will meet with Steve to discuss how IOUCA can work with CEAP on the issue.*

ACTION: *Complete the accessibility standards and guidelines workbook.*

Assigned To: *Neal Albritton*

Due: *April 11, 2006 (Update)*

Update: *In progress.*

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

Assigned To: *Donna Freeman*

Due: *April 11, 2006*

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Update: These are specific recommendations HFI made for FTB. FTB should be able to post them on the working group site.

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

Assigned To: Donna Freeman

Due: April 11, 2006 (Update)

Update: Donna is recommending the IOUCA adopt the comprehensive guidelines posted on FirstGov's www.usability.gov. Donna will work on grouping the guidelines so they are easy to view, use, and understand. Donna, John, Kris, and Debbie will try to schedule a conference call with FirstGov to discuss our plans to adapt their guidelines for clear, easy understanding.

ACTION: Develop a beginner's version of the workbook.

Assigned To: Neal Albritton

Due: April 11, 2006 (Update)

Update: In progress

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

Assigned To: Neal Albritton

Due: April 11, 2006

Update: The accessibility review is planned for this week.

ACTION: Post the workbook on the IOUCA working group website.

Assigned To: Neal Albritton/Donna Freeman

Due: April 11, 2006 (Update)

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: April 18, 2006 (Update)

Update: Delayed update three weeks; dependent on completion of list of formats to begin.

ACTION: Discuss a process for disseminating information to a wide audience quickly.

Assigned To: John Jewell and Dan Whetstone

Due: April 18, 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: April 25, 2006 (Update)

Update: Update in one month.

Next Steps

Next IOUCA Meeting: April 18, 2006

Kris Ogilvie, Debbie Schwartz

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Library & Courts II, 900 N Street, Room 340

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