

**Information Organization, Usability, Currency & Accessibility (IOUCA)
IT Leaders Presentation - Outline**

Date: April 11, 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 checked="" 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 type="checkbox"/> John Jewell (CSL) | <input checked="" type="checkbox"/> Patrick Johnson (DOR) |
| <input checked="" type="checkbox"/> Anamarie Malone (DTS) | <input type="checkbox"/> Liz Mechem (Insurance) | <input checked="" type="checkbox"/> Claudina Nevis (SCIO) |
| <input checked="" type="checkbox"/> Joni Ogata (DMHC) | <input checked="" 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 checked="" type="checkbox"/> Dan Whetstone (DTS) |
| <input checked="" type="checkbox"/> Brian Reed (Visiting, Design Media) | | |

Review Minutes from Previous Meeting

Debbie Schwartz

The minutes for the April 4th meeting were approved with one change. In the open forum section, the minutes noted that Design Media – the consultant hired by DOR to develop accessibility training – would review 15 templates for accessibility. Per the contract, they will review 12-15 templates. The minutes were revised.

The revised minutes for the March 21st meeting were approved with no changes.

IT Leaders Meeting

Claudina Nevis

The IT Leaders meeting is held on a quarterly basis with all CIO's. The last meeting was held in November 2005. The primary audience is CIO's, although some bring their executive team. ISO's and webmasters are being included in the invitation for the April 28th meeting.

The working group reviewed an outline for the presentation and suggested revisions. The revised outline reflecting the suggested changes is attached. Steve will bring his laptop for the CSS demonstration; he will arrive early to set up and test the equipment.

Portal Redesign Project (PRP) Update

Dan Whetstone

Dan and Rick are working to solidify the work plan for the state portal redesign. They are hosting presentations by respondents to the RFI requesting information on the portal redesign.

- Search engine fix:
 - PRP distributed two surveys last Friday to gather information about the current search engine functionality. One survey was aimed at public users, the other at department CIO's.
 - The PRP team is rethinking replacing the current search engine, Autonomy (formerly Verity), with Google or another search engine. Research and a presentation by Kevin, DTS' primary search engine technician, indicate that the upgrades of our current search engine are very good and should meet our needs. Upgrades are included in our maintenance contract. An upgrade to Autonomy is available now; a future upgrade to their new product, Idol, should be available in 4th Quarter, 2006. Upgrades could be implemented throughout the state. PRP is continuing to research the issue and compare the functionality offered by Autonomy versus other search engines.
 - Dan noted that the search engine won't be truly functional until the tagging issue is resolved. IOUCA will be addressing tagging.
- Payment engine: PRP is looking into whether it makes more sense to purchase a payment engine for the state or to use an existing departmental payment engine and expand to meet

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state needs. They received bids last week in response to their RFP to identify state payment engine requirements; the bid review process is scheduled for 45 working days.

- The PRP team is developing bid document to hire a vendor to write the RFP for the actual portal redesign. They plan to release the RFP in July and award a contract in November 2006.
- Dan and Rick are looking at revising their governance plan to make the project less IT-driven and more business-driven.
- Look and Feel Design RFP: Two responses to the Look and Feel RFP were received. One bid was non-responsive; the other was more costly than anticipated. PRP will meet with John, Kris, and Debbie to determine if IOUCA can deliver some of the work, allowing PRP to cancel the bid. Dan will schedule the meeting for the end of this week.

Open Forum – Recommendations From Team

All

1. Neal introduced Brian Reed from Design Media, the vendor hired by DOR to develop and present web accessibility training to state webmasters. Brian is Design Media's project manager and lead person for this contract. It was noted that the training session name should be changed from Section 508 training to web accessibility training.

Brian reviewed the main deliverables included in their contract with DOR.

- Create a training guide for basic and advanced classes. Training will include information about cascading style sheets and html stripped pages and will offer a lot of hands-on exercises where trainees will bring real-world pages into compliance.
 - Level 1: Directed at a somewhat technical audience, Level 1 training will start with the basics of accessibility including awareness of Section 508 A, AA, and AAA issues, and will touch on accessibility issues surrounding other technologies.
 - Level 2: Directed at a technical audience with some experience in web accessibility. Level 2 training will cover Section 508 Level A and AA issues in great detail, will cover Level AAA issues in lesser detail, and will touch on accessibility issues surrounding other technologies.
 - Template Review
 - Create an accessible website containing a superset of training materials and a database of state best practices collected from state agencies
2. IT Council is scheduled to meet on April 21, 2006. John Jewell is on the agenda to provide a briefing on IOUCA.
 3. A message was posted on the IT Forum asking when FTB's templates would be released for use by other departments. The working group agreed that Donna should respond that the templates are being reviewed and more information will be forthcoming. She will also mention the IT Leaders meeting scheduled for April 28th.

Open Issues

Debbie Schwartz

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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 accessibility*Departments 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.*

5. Should IOUCA set up a Webmasters Forum?
The current Webmasters IT Forum serves this purpose. We can request that the system send an email alert every time a message is received. The working group may want to assign watching the forum to a single person so the entire team isn’t inundated with emails. The group may also want to consider developing and posting an FAQ on the State CIO’s website to minimize questions and promote communication. Steve will provide a recommendation at the April 18th meeting.

Action Items

Kris Ogilvie

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: Complete. Clark Kelso sent the letter to the Director and Deputy Director of DOR; it was well received.

ACTION: Complete the accessibility standards and guidelines workbook.

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Assigned To: Neal Albritton

Due: April 25, 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 18, 2006

Update: In progress.

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

Assigned To: Donna Freeman

Due: April 18, 2006 (Update)

Update: Donna is in contact with FirstGov; the conference call has not yet been scheduled.

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

Assigned To: Neal Albritton

Due: April 25, 2006 (Update)

Update: In progress.

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

Assigned To: Neal Albritton, Donna Freeman

Due: April 25, 2006

Update: DOR has reviewed the templates and found they were usable by two employees; users were able to maneuver through the site with little difficulty using JAWS and Window Eyes. Forms presented some issues, but users were able to work around them. Brian Reed (Design Media) could review a few subsets by the end of April, but full review of the templates would take longer. It was decided that the DOR accessibility reviews should be sufficient to ensure accessibility. FTB needs to determine whether to put the recommended accessibility bar at the top of their website. Donna is discussing with FTB's web designers; a decision should be reached in the next two weeks.

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

Due: May 2, 2006 (Update)

Update: In progress.

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

Assigned To: Debbie Schwartz

Due: April 11, 2006

Update: No update.

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

Assigned To: Steve Clemons, Debbie Schwartz

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

***Update:** Steve noted that there are several file types and versions being used on the state website; basically every file type and version available is in use. Developing a list of file types and versions will be time consuming. Steve recommended developing a prioritized list of file types and versions that are most accessible and should be used by departments. Steve will send Neal a compilation of the information gathered to date. The action item will be closed and a new action item created for development of the prioritized list.*

***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:** Closed; see notes for action item to identify formats currently being used (noted above).*

***ACTION:** Develop a list of file types and versions that should be used for California web pages. The list should be prioritized by most desirable and focused on where we want to be in the future rather than where we are now.*

***Assigned To:** Neal Albritton, Steve Branson, Steve Clemons*

***Due:** April 25, 2006*

***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:** 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:** 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*

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Due: April 25, 2006 (Update)

Update: Update in one month.

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

Due: April 25, 2006

ACTION: *Provide a recommendation regarding IOUCA's use of the Webmaster's IT Forum and an FAQ posting on the State CIO's website (see Issue #5).*

Assigned To: Steve Branson

Due: April 18, 2006

Next Steps

Kris Ogilvie, Debbie Schwartz

Next IOUCA Meeting: April 18, 2006
Library & Courts II, 900 N Street, Room 340
9:00 – 11:00 a.m.

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1. A high level briefing about the workgroup focused on CIO's and AIO's.
 - Governance and responsibility/authority of working group
 - Working group will provide recommendations, not set standards
 - State Portal Steering Committee with input from State Portal Review Board is responsible for setting standards.
 - What are we doing?
 - What are we not doing?
 - Who is involved?
 - What is our objective and how will we meet it?
 - Working closely with PRP
2. Planned proof of concept
 - State CIO website plus another site
 - Apply the recommended standards
 - Note lessons learned and revise recommendation or training as needed
 - Develop metrics
3. Notification of upcoming web accessibility training and ongoing training opportunities.
4. A more technical portion focusing on style sheets to encourage webmasters to attend the meeting (5 minutes)
 - Include presentation to show the simplicity and benefits of CSS
 - Address conversion issue
5. How webmasters and IT leaders can get involved and stay informed
 - Webmaster Forum
 - Meeting minutes posted on State CIO's website

NOTE: Plan 10 minutes for PowerPoint presentation and 5 minutes for CSS demonstration.