

**Information Organization, Usability, Currency & Accessibility (IOUCA)
Meeting Minutes**

Revised June 20, 2006

Date: May 16, 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 type="checkbox"/> Steve Branson (DHS)
<input checked="" type="checkbox"/> Steve Clemons (CEAP)	<input type="checkbox"/> Donna Freeman (FTB)	<input type="checkbox"/> Theresa Giles (DHS)
<input checked="" type="checkbox"/> Jennifer Harper (DHS)	<input checked="" type="checkbox"/> Jeff Hillard (CDFA)	<input checked="" 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 type="checkbox"/> Claudina Nevis (SCIO)	<input checked="" type="checkbox"/> Sally Nietering (POST)	<input type="checkbox"/> Joni Ogata (DMHC)
<input checked="" type="checkbox"/> Kristine Ogilvie (CSL)	<input checked="" type="checkbox"/> Bill Passavant (DSS)	<input type="checkbox"/> Rob Quigley (SCIO)
<input checked="" type="checkbox"/> John Quijada (DMV)	<input checked="" type="checkbox"/> Deborah Schwartz (CRB)	<input type="checkbox"/> Rick Vagg (DTS)

Review Minutes from Previous Meeting **Debbie Schwartz**

The minutes for the May 9th meeting were approved with no changes.

Portal Review Board Meeting **Debbie Schwartz**

The State Portal Review Board met on May 12th. IOUCA reviewed the planned components for our recommendations and proposed the review and approval process flow. They were well received. Dale Jablonsky from EDD spoke of their recent federal audit experience for website accessibility.

Templates: Recommendation vs. Evaluation **Debbie Schwartz**

Postponed until next meeting.

Levels of Compliance (Issue #4) **Debbie Schwartz**

It was proposed that the IOUCA's recommendations for standards and guidelines follow a multi-level compliance model to allow departments to meet standards while accommodating for differences between departments in technology skills, experience, equipment, and department needs. For example:

Level I	Minimum (e.g., Section 508)
Level II	Mid (e.g, Section 508 + W3C Levels 1,2)
Level III	High (e.g, Section 508 + W3C Levels 1,2,3)

It was noted that webmasters want to be able to support their recommendations, decisions, and actions by referencing official state information. Webmasters need more support and enforcement of the standards. The IOUCA may want to consider a method of certifying or self-certifying departments at the various levels, then allowing the departments to post their level of compliance on their site.

Department CIO's could be required to submit regularly scheduled implementation plans that note the level of compliance planned for the planned period. It was noted that this type of decision should be made at the CIO level rather than the Webmaster level to ensure priority and resource availability.

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Portal Redesign Project

John Jewell

John Jewell, Kris Ogilvie, and Debbie Schwartz met with Rick Vagg and Keith Mitsuyasu on May 10th to discuss the state's contract with HFI. The HFI kickoff meeting is scheduled for Friday May 19th. John, Kris, and Debbie will meet with HFI on Thursday May 18th.

Web Accessibility Training

Neal Albritton

BOE volunteered their training facilities at no charge for DOR's web accessibility training scheduled for August and September 2006. BOE will receive one seat per class in exchange for their facilities. DOR has set the dates for the training; Neal will provide them to the working group. There will be 25 trainees per class.

Working Group Teams

Debbie Schwartz

The working teams met to further develop the recommendations on accessibility, usability, and Cascading Style Sheets. Boating and Waterways' PIO offered to review the draft accessibility standards with her staff; she will attend next week's meeting. EDD and DSS also volunteered to vet the draft accessibility standards.

Action Items

Debbie Schwartz

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

Assigned To: Donna Freeman

Due: May 23, 2006

Update: Donna reviewed the federal guidelines at www.usability.gov for standards and guidelines that may benefit California but are not covered by www.usability.gov. She found that the up-front tasks that occur before the design phase were missing. She is pulling together some recommendations and should have a draft next week.

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: May 23, 2006 (Update)

Update: Steve Clemons is trying to schedule a meeting with Adobe.

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: May 23, 2006 (Update)

Update: No update – Comments from 4/25: If we create a topic in the general IT Forum, users would need to scroll down to find the IOUCA messages. Setting up a separate forum or a sub-forum would separate our messages and add a link at the top of the page. It was recommended that if we set up a separate or a sub-forum that we consider including all of the portal redesign elements such as IOUCA, CEAP, and the Portal Redesign Project. The name should be broad enough to encompass these and future related topics. John, Dan, and Steve Clemons will meet to discuss the appropriate name and scope for our forum.

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

Assigned To: Debbie Schwartz

Due: May 16, 2006 (Update)

Update: Close – a working team is addressing this.

ACTION: Amend our recommendation process to include departmental assessment of draft standards and guidelines for a real-world perspective. Not addressing real-world concerns will hurt our credibility.

Assigned To: John Jewell, Kris Ogilvie, Debbie Schwartz

Due: May 16, 2006 (Update)

Update: Close – added as an agenda item.

Future Action Items (Not Scheduled for Review this Week)

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

Assigned To: Neal Albritton

Due: May 23, 2006 (Update)

Update: In progress

ACTION: Discuss a process for disseminating information to content providers and webmasters quickly. Prepare a plan to establish ongoing communication with webmasters.

Assigned To: John Jewell and Rick Vagg

Due: May 23, 2006 (Update)

Update: John and Rick will meet to discuss.

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 Mecham

Due: May 23, 2006 (Update)

Update: In progress. Claudina is discussing the issue.

Parking Lot

Debbie Schwartz

1. Frame the issue of application accessibility and usability.

Assigned To: Steve Clemons

Due: April 18, 2006 (Update)

Update: It was agreed that these two action items are outside the scope of the IOUCA working group. We agreed that it was something we should be aware of. It was suggested that the two items be put in the parking lot for the time being and revisited in about a month.

2. 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)

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Update: See above.

3. *Content authors may benefit from training and instruction in writing for the web. There is a need for training for content developers. It may be beneficial if the IOUCA could identify these training needs. DHS offers web author training for readability, usability, and targeting information to the specific audience.*
4. *What pages will be impacted by the standards (e.g., .ca.gov, .org, .com)? How do we define what constitutes a state web page? What about departments that provide content on non-ca.gov websites?*

Next Steps

Kris Ogilvie, Debbie Schwartz

Next IOUCA Meeting: May 23, 2006

Library & Courts II, 900 N Street, Room 340

9:00 – 11:00 a.m.

Agenda Items for Next Meeting:

1. Web Accessibility Training

How to select/recturit individuals to participate in the training?

Next Steps?

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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? **How will California ensure the application of standards across departments and over time (quality assurance)?***[added 5/2]*
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. What skill sets will be needed to communicate, maintain, and implement the standards, guidelines, and tools the IOUCA is recommending?
6. How do we separate content from HTML (CSS only separates content from presentation)?
This can be done through master templates in Dreamweaver, content management systems, or hard coding. The team needs to determine if this is part of our scope.