

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

**Date:** June 27, 2006

**Time:** 9:00 – 11:00 a.m.

**Location:** LC II, Room 340

**Attendees:**

<input checked="" type="checkbox"/> Linda Aguilar (DHS)	<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"/> Donna Freeman (FTB)	<input type="checkbox"/> Theresa Giles (DHS)
<input checked="" type="checkbox"/> Jennifer Harper (DHS)	<input type="checkbox"/> Jeff Hillard (CDFA)	<input checked="" type="checkbox"/> John Jewell (CSL)
<input checked="" type="checkbox"/> Patrick Johnson (DOR)	<input checked="" type="checkbox"/> Bill Kodani (DOT)	<input type="checkbox"/> Richard Lehman (CEAP)
<input checked="" type="checkbox"/> Lee Macklin	<input checked="" type="checkbox"/> Anamarie Malone (DTS)	<input checked="" type="checkbox"/> Liz Mechem (Insurance)
<input type="checkbox"/> Frank Montez (DHS)	<input checked="" type="checkbox"/> Claudina Nevis (SCIO)	<input type="checkbox"/> Sally Nietering (POST)
<input type="checkbox"/> Joni Ogata (DMHC)	<input 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"/> Brenda Washington (DHS)	<input checked="" type="checkbox"/> Morris Weisbart (CDFA)	

**Enterprise Architecture Program Update Lee Macklin**

CEAP is breaking the Service Oriented Architecture (SOA) into four small sections and a master guide. They will present it to the State Controllers Office on June 28.

The first implementation of the Technical Reference Model to set statewide standards for networking is in progress; Dale Jablonsky is setting up a working group to define the standards.

CEAP is working on the enterprise payment system. They are in discussions with the federal Treasury Department regarding the feasibility of having all state payments funnel through the federal system; this would allow citizens to pay state, local, and federal government from a single source.

CEAP is setting up three working groups

1. Define and handle shared services statewide headed by Chris Dunham (DHS)
2. Common medical information systems for health identification headed by Gary Renslow (DMH)
3. Common identification system for all tax agencies headed by BOE.

**Portal Redesign Project Update Anamarie Malone**

DTS met with HFI to discuss their recommendations from their expert review of the state portal. One of HFI's findings is that graphics use too many colors; it is distracting. HFI wants IOUCA to add a review of graphics people want to post online. Reviewing pages is not in IOUCA's scope. IOUCA can include best practices in usability standards that address the problems created by too many competing graphics, colors, layouts, etc. IOUCA can also provide examples of good and bad design. IOUCA want HFI's input in developing the guidelines.

PRP will completely redesign the state homepage. The issue of branding is still unresolved. HFI laid out some options (examples illustrating usability best practices *not* designs) that maintain a state brand while prominently noting the department.

**Status Updates – Recommendations to Review Board Working Teams**

DMV completed their real-world review of the Usability recommendation. A common reaction of their web team to several of the standards was concern regarding implementation. Specific concerns were noted and provided to the Usability sub team for incorporation into the recommendation.

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Real-world reviews of the first three recommendations will continue; comments are due to the subgroups by July 1, 2006.

**Recommendations for September Presentation** **Working Teams**

Sub teams were established to start work on the recommendations for presentation to the Review Board in August or September. Sub teams will begin gathering information with work beginning after the Steering Committee meeting on July 14.

➔ Usability

Donna Freeman  
Liz Mechem  
Linda Aguilar

➔ Technical Implementation

Steve Branson  
Patrick Johnson  
Morris Weisbart  
Frank Montez

➔ Content

Debbie Schwartz  
Shayn Anderson  
Jennifer Harper

➔ Findability

John Jewell  
Jennifer Harper  
Anamarie Malone  
Neal Albritton  
Steve Branson

Ongoing or future efforts were also identified:

- ✓ File formats (including PDF)
- ✓ Web application and web form accessibility
- ✓ URL, Domain, and Sessions
- ✓ Cross-agency portals
- ✓ Website planning and management
- ✓ Emerging technology
- ✓ Hyperlink management

**Action Items**

**Debbie Schwartz**

**ACTION:** The working group discussed the need for a broader implementation plan than what is contained in the recommendation. It was felt that integrated document with next steps should be developed to guide implementation of the recommended standards. John and Debbie will work on this offline.

**Assigned To:** *Debbie Schwartz, John Jewell*

**Due:** *July 25, 2006 (Update)*

**Update:** *In progress.*

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**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*

*Due: July 11, 2006 (Update)*

*Update: Neal will start developing the list of accessibility requirements for Adobe products.*

**ACTION:** Follow up on the feasibility of using Executive Institute as a vehicle for ongoing training for executives.

*Assigned To: Claudina Nevis and Liz Mecham*

*Due: July 25, 2006 (Update)*

*Update: Claudina and Liz will determine how Executive Institute could serve as a vehicle for ensuring that executive management understands the business needs for accessible, usable websites as well as what needs to be done to achieve this.*

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

*Assigned To: Neal Albritton*

*Due: June 20, 2006 (Update)*

*Update: Complete.*

**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*

*Due: July 25, 2006 (Update)*

*Update: Claudina is working on a survey/request to be issued by the State CIO asking departments to provide the name and contact information for a single point of contact for their department's webmasters. A meeting is planned for July 28, 2006 to present the IOUCA and HFI recommendations to state webmasters.*

### **Future Action Items (Not Scheduled for Review this Week)**

**ACTION:** Follow up on the feasibility of using GTC as a vehicle for ongoing technical training.

*Assigned To: Claudina Nevis and Liz Mecham*

*Due: October 10, 2006 (Update)*

*Update: Claudina met with the executive officer of GTC; they were very receptive to working with us. They are looking for some guidance from IOUCA; Claudina will follow up in October after the Web Accessibility Training is complete.*

### **Parking Lot**

1. *Frame the issue of application accessibility and usability.*

*Assigned To: Lee Macklin*

*Due: July 25, 2006 (Update)*

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*Update: It was noted that many online applications are written by consultants; the state may not have the necessary skills to make changes. It was suggested that the two parking lot items be considered as Phase 2. IOUCA will need to work closely with CEAP on the two items. Lee Macklin and Neal Albritton will meet to discuss the issues.*

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

*Assigned To: Lee Macklin*

*Due: July 25, 2006 (Update)*

*Update: See above.*

**Next Steps**

**Kris Ogilvie, Debbie Schwartz**

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

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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.*

**Parking Lot**

**Debbie Schwartz**

3. *Frame the issue of application accessibility and usability.*

*Assigned To: Steve Clemons*

*Due: April 18, 2006 (Update)*

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***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.*

4. *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:** See above.*

5. *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.*