

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

Date: July 18, 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 type="checkbox"/> Bill Kodani (DOT)	<input type="checkbox"/> Richard Lehman (CEAP)
<input type="checkbox"/> Lee Macklin	<input type="checkbox"/> Anamarie Malone (DTS)	<input type="checkbox"/> Liz Mechem (Insurance)
<input checked="" 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 checked="" type="checkbox"/> Kristine Ogilvie (CSL)	<input checked="" type="checkbox"/> Bill Passavant (DSS)
<input type="checkbox"/> Rob Quigley (SCIO)	<input type="checkbox"/> John Quijada (DMV)	<input checked="" type="checkbox"/> Deborah Schwartz (CRB)
<input checked="" type="checkbox"/> Brenda Washington (DHS)	<input checked="" type="checkbox"/> Morris Weisbart (CDFA)	

Previous Minutes and Action Items

Debbie Schwartz

The meeting minutes for May 23rd, June 20th, and July 11th were approved with no changes.

Steering Committee Meeting

Claudina Nevis/John Jewell

Neal presented the Accessibility recommendation, Donna presented the Usability recommendation, and Debbie presented the recommendation on Separating Content from Presentation. All three recommendations were adopted by the Steering Committee. Clark will begin discussions with Department of Finance about the financial implications of the adopted recommendations.

A handout of Clark Kelso's presentation to the Steering Committee was provided to the IOUCA. The presentation focused on the major pieces of HFI's recommendations that have implications for California. Clark will present the information to the undersecretaries today.

- Suggested banner designs
 - ➔ The concept of the designs received a generally positive reaction from the Steering Committee; however, the actual images were not accepted. The logo was the primary focus of dissent.
 - ➔ Clark will take the information and the request to redesign the proposed logo back to HFI.
- Grid system for page design
 - ➔ The grid design for page design received a positive response from the Steering Committee. It provides more flexibility for agencies within a common grid structure.
- Usability Teams
 - ➔ Clark and HFI proposed the ideal teams to participate in web design for California websites. The teams include content developers, usability specialists, graphic artists, accessibility experts, and technical implementers. Formation of these teams will require development of skills and training, particularly in the area of usability.

State and Consumer Services Agency (SCSA) will be playing a role (business owner) in the state portal with Andrew Armani in the leadership role at this time.

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Webmasters Meeting (July 28, 2006)

Claudina Nevis/John Jewell

Invitations have been sent out to the current Webmasters list; Claudina is working on a more current list, but it is not yet complete. She asked IOUCA to pass on the information to anyone they felt would be interested. The conference room scheduled can accommodate up to 300 people, with room for up to 200 more in an adjoining room. It was recommended that Claudina circulate Clark's presentation to the Steering Committee to generate interest.

Claudina is working with Will Bush on the possibility of a webcam interview on the importance of usability to show at the meeting. It would also be helpful if the video was posted online as an ongoing resource. It was noted that the video would need to include closed captioning for accessibility. Bill Passavant and Patrick Johnson volunteered to help Claudina with the technical and accessibility aspects. They will also work with CalEPA who is recording and broadcasting the event. Claudina wants to pre-record the interview; the Library has a video camera that can be used.

Brenda and Linda volunteered to greet attendees as they enter the conference room. Steve Branson agreed to run the presentations.

California Enterprise Architecture Program

John Jewell

John noted that the Library is working on a digital preservation project looking at accessibility and long-term access to state documents. They will need to coordinated with CEAP.

Portal Redesign Project (PRP)

John Jewell

John, Kris, Claudina, and Debbie met with PRP to discuss what they are working on and how IOUCA can support and assist their efforts. Keith is defining their tasks and identifying where they would like us to help. Keith will attend the next IOUCA meeting and should have more information at that time.

Clark and Claudina may have new assignments and priorities for IOUCA over the next few weeks.

The IOUCA process of cross-agency development of recommendations that are vetted through departments, the Review Board, and the Steering Committee is being used as a model for similar efforts.

Issue: Google and Accessibility

Debbie Schwartz

Anna Brannen announced at Friday's Steering Committee meeting that the Portal Redesign Project (PRP) had selected Google as the new state search engine. DOR noted that Google has some known accessibility issues that will need to be addressed. Neal is developing a list of these issues; it should be complete this week. A message has been sent to Google requesting a meeting with Clark, DOR, and IOUCA to discuss the accessibility issues and how or if Google can fix them. The discussions will follow the model used with Adobe.

Issue: Adobe and Accessibility

Debbie Schwartz

Neal received feedback from Troy at Adobe last Friday regarding some of the issues that were raised at the meeting in March. Adobe claims that their toolset includes methods of making PDFs accessible to people with low vision. Neal has scheduled a meeting on August 16 at 10:00 a.m. in Department of Rehabilitation's Redwood Room where Adobe will demonstrate how to use Adobe to create an accessible PDF.

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State CIO Website Redesign: Proof of Concept **Claudina Nevis**

The State CIO's Office has asked FTB to help with their redesign effort; they will be meeting this afternoon to discuss. The design will incorporate the three recommendations adopted by the Steering Committee, HFI's recommendations, and Clark's presentation. We hope to gather metrics from the experience that can be made available to other departments.

HFI Recommendations for PRP (Expert Analysis) **Kris Ogilvie/Debbie Schwartz**

IOUCA will review the HFI reports based on their Expert Analysis and Usability Testing to identify:

- Questions
- Unclear statements
- Statements that conflict with IOUCA recommendations
- Statements that conflict with our understanding of the concepts
- Statements that conflict with our understanding of California's environment

Issues that seem to present a conflict or error should be red-flagged.

Next Steps **Kris Ogilvie, Debbie Schwartz**

Next IOUCA Meeting: July 25, 2006
Library & Courts II, 900 N Street, Room 340
9:00 – 11:00 a.m.

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.

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: 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

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contact for their department's webmasters. A meeting is planned for July 28, 2006 to present the IOUCA and HFI recommendations to state webmasters.

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: August 1, 2006 (Update)

Update: Neal has completed the list of accessibility requirements for Adobe products; he will send to Debbie for distribution to IOUCA. Neal has scheduled a phone call with Troy Bare of Adobe this afternoon to set up a meeting next week to discuss California's accessibility requirements for Adobe products. Neal will meet with Lee to discuss other file types.

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)

Parking Lot

1. Frame the issue of application accessibility and usability.

Assigned To: Lee Macklin

Due: July 25, 2006 (Update)

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.

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.

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

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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.