

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

California Portal Steering Committee

**Date:** March 14, 2006

**Time:** 9:00 – 11:00 a.m.

**Location:** OPR, Room 202

**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 checked="" 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 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 checked="" type="checkbox"/> Rob Quigley (SCIO)    |
| <input checked="" type="checkbox"/> Deborah Schwartz (CRB) | <input checked="" type="checkbox"/> Rick Vagg (DTS)        | <input checked="" type="checkbox"/> Dan Whetstone (DTS)   |

**Review Minutes from Previous Meeting**

**Debbie Schwartz**

The minutes for the March 7<sup>th</sup> meeting were approved with no corrections.

**Recommendation on FTB Template**

**Working Group**

**Accessibility:** Neal has begun the preliminary accessibility evaluation of the templates. He is extracting the html using Bobby 5. There is only one primary error found to date. The homepage/index is showing an error on the search engine. DTS stripped out a lot of code to allow developers to adapt the template to meet their department's needs. It is possible that this is contributing to the error. DOR noted that when they were evaluating Google search, they came across accessibility errors related to the font size in the search (8-9 point); this could be a similar problem. Neal will continue to evaluate the templates; he may add content then evaluate because Bobby works better with web pages than templates. When finished, he will develop a report on the review with errors divided by type and level of severity. He will notify the IOUCA of any major errors as soon as they are identified.

The detailed accessibility review is planned to begin next week after the preliminary review is complete. It will take approximately two weeks to complete.

**Usable by Developers:** Complete.

**Usability:** Donna is waiting to hear back from HFI; she used recommendations from the HFI report to develop usability standards and guidelines but needs HFI approval to ensure there is no copyright issue. She has also asked permission to use HFI's usability checklist. She sent a follow up message to HFI on March 13.

**New Design Procedure:** Still assembling the timeline.

**Outstanding Questions:** None.

**Top Level Standards, Guidelines, and Best Practices**

**Working Group**

It was noted that standards, guidelines, and best practices should be focused on designing in the qualities we want rather than checking for compliance after completion.

**Accessibility:** Neal emailed the first draft of the accessibility standards and guidelines to the IOUCA on March 14<sup>th</sup>. The standards incorporate Section 508 and W3C Priority 1 and 2. The guidelines focus on W3C Priority 3. State and federal law require section 508 compliance. The standards and guidelines provide text explanations, references to Section 508 and W3C supporting information, and hyperlinks to tutorials. It was noted that if templates are established using style sheets rather than table-positioning, departments will be poised to achieve maximum

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accessibility. Neal will evaluate the FTB style sheets for accessibility, review the standards and guidelines with revisions as needed for clarity, format the guidelines and standards as a workbook, and send the finished workbook to Donna to post on the IOUCA working group website. Once the standards are complete, Neal plans to begin developing a beginner's version aimed at web developers with little knowledge about accessibility.

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

**Assigned To:** *Neal Albritton*

**Due:** *March 28, 2006*

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

**Assigned To:** *Neal Albritton/Donna Freeman*

**Due:** *March 28, 2006 (Update)*

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

**Assigned To:** *Neal Albritton*

**Due:** *April 4, 2006 (Update)*

**Usability:** Donna is waiting to hear back from HFI; she used recommendations from the HFI report to develop usability standards and guidelines but needs HFI approval to ensure there is no copyright issue. She has also asked permission to use HFI's usability checklist. She sent a follow up message to HFI on March 13.

**Communication, Training, Adoption, and Enforcement**

**Debbie**

The working group brainstormed ways to communicate the standards to state webmasters and leaders, to provide training to ensure understanding, to encourage adoption, and to enforce the standards as needed.

- Continue proof of concept with major departments (FTB, DHS, EDD, DHMS, PRP)  
Successful proof of concept efforts will demonstrate that the standards, etc. work as planned. Departments who have successfully completed a proof of concept can serve as champions of the portal efforts.
- Establish a Director of eServices for California  
This is a current effort by the State CIO. A Director of eServices for California could provide leadership, marketing, and enforcement of statewide standards and guidelines.
- Address continuous training  
California did not do this well with the last portal effort. DHS has a monthly class that has proven beneficial. It was noted that we might want to pursue an eLearning environment. Training could include basic html and/or advanced web topics. We need to decide if training should be the same or different each month, how often to offer the training (monthly?), basic or advanced, etc. It was noted that we might want to tailor the training to tasks that the attendees have the authority and ability to do.
- Post standards and guidelines on California webmasters site ([www.webmasters.ca.gov](http://www.webmasters.ca.gov)).  
Standards and guidelines are currently posted on the webmasters site. It will be important that IOUCA develop procedures to maintain the new standards and guidelines to ensure that

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they are current and accurate. It was suggested that we may want to provide a forum for webmasters to ask and respond to questions through the webmaster site.

- EMail List of Content Managers and/or Webmasters  
The federal government has developed a Web Content Managers Forum that holds conference calls each month to discuss a web-related topic. They found that this keeps their content managers informed of major issues, fosters communication between agencies, and builds relationships throughout government. The forum can be accessed at <http://www.webcontent.gov>.

Neal noted that there is a similar forum focused on accessibility provided through the University of Wisconsin; it can be accessed through <http://trace.wisc.edu:8080/mailman/listinfo/sec508>.

**Proof of Concept Using SCIO Templates**

**Debbie**

Anamarie, Claudina, Debbie, and Donna will meet following this meeting to discuss a process for performing a proof of concept on the standards, guidelines, processes, and templates developed by the IOUCA using the State CIO web pages. It was noted that we may also want to consider using the redesign of [www.taxes.ca.gov](http://www.taxes.ca.gov) as a proof of concept.

**Open Forum – Recommendations From Team**

**All**

EDD is interested in acting as a proof of concept for the accessibility standards and guidelines being developed by the IOUCA. They are committed to providing accessible web pages. The department is currently undergoing a federal audit. They are discussing whether to apply the standards to their current website or to redesign the site using the standards. Shayn Anderson has joined the working group to represent EDD.

At the State Portal Review Board meeting on March 10<sup>th</sup>, DOR proposed three accessibility standards for statewide adoption. The Review Board tabled a decision pending IOUCA recommendation. Neal will incorporate the standards into the accessibility documentation being developed.

The working group discussed the need to develop a process for communicating urgent items to a wider audience. John and Dan will discuss offline.

DOR is working on developing accessibility training. They are investigating the feasibility of bringing the group that is providing the sold-out hands-on training in San Francisco to Sacramento for a state government training session. Knowbility is a federally funded enterprise; their fees cover their overhead only. If DOR is able to schedule an accessibility training session, we would need to determine who should attend.

**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 14<sup>th</sup> that we consider offering a resource gallery of images that can be used by any state department. It would be possible to*

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*offer a suite of templates using different designs that may target various demographic populations (i.e. teens, children, adults, seniors, etc) perhaps with differing color palettes, styles and page layout options that are designed to meet accessibility requirements. A service offering of this variety may save many Departments from investing heavily in design services allowing them to focus more on information architecture and construction.*

*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.*

**Action Items**

**Kris Ogilvie**

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

**Assigned To:** Neal Albritton

**Due:** March 28, 2006

**Update:** In progress. Neal will email a report on his analysis to the IOUCA when complete.

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

**Assigned To:** Neal Albritton

**Due:** April 4, 2006

**Update:** Plan to begin next week after preliminary analysis is complete. It will take two weeks to complete.

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

**Assigned To:** Donna Freeman

**Due:** March 21, 2006

**Update:** Waiting for approval from HFI; sent a follow up message on March 13.

**ACTION:** Amend the proposed procedure for submitting new website designs to allow for informal email reporting of initial concept information.

**Assigned To:** Debbie Schwartz

**Due:** March 14, 2006

**Update:** Change completed and approved.

**ACTION:** Notify the State Portal Review Board of the issue surrounding how to design templates for current technology standards while accommodating departments with a wide range of expertise and software tools.

**Assigned To:** John Jewell or Kris Ogilvie

**Due:** March 14, 2006

**Update:** Kris notified the Review Board of the issue at their March 10<sup>th</sup> meeting.

**ACTION:** Complete the accessibility Guidelines

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*Assigned To: Neal Albritton and Patrick Johnson*

*Due: March 14, 2006*

*Update: Completed and emailed to working group on March 14, 2006.*

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

*Assigned To: Donna Freeman*

*Due: March 21, 2006 (Update)*

*Update: Waiting for approval from HFI; sent a follow up message on March 13.*

**ACTION:** *Schedule meeting with Anamarie, Claudina, and Donna to discuss SCIO proof of concept.*

*Assigned To: Debbie Schwartz*

*Due: March 14, 2006*

*Update: Complete. Meeting scheduled March 14, 2006.*

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

*Assigned To: John Jewell*

*Due: March 21, 2006*

*Update: John spoke with Richard Devylder of DOR on March 10<sup>th</sup> emphasizing the importance of DOR's involvement in the IOUCA working group and the associated proof of concept. He will follow up with an email.*

**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: March 21, 2006 (Update)*

*Update: No update.*

**ACTION:** *Send the IOUCA working group charter, member list, meeting schedule, meeting agendas, and meeting minutes to Claudina and Anamarie for posting on the State CIO website ([www.cio.ca.gov](http://www.cio.ca.gov)).*

*Assigned To: Debbie Schwartz*

*Due: March 14, 2006*

*Update: Complete. Debbie sent documents to Claudina and Anamarie on March 8<sup>th</sup>; Anamarie posted the documents to the SCIO website on March 10<sup>th</sup>.*

**ACTION:** *Meet with Dan Whetstone to discuss IOUCA and PRP.*

*Assigned To: John Jewell, Kris Ogilvie, and Debbie Schwartz*

*Due: March 14, 2006*

*Update: John, Kris, and Debbie met with Dan Whetstone and Rick Vagg on March 9<sup>th</sup>. It was a very positive meeting. We discussed what IOUCA is currently working on and identified ways that the IOUCA and the Portal Redesign Project (PRP) could work together. PRP asked that IOUCA be involved in working with the consultant they are hiring to develop the new look and feel; the Statement of Work is nearly*

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*complete and they plan to release it next week. PRP will provide a copy for the IOUCA website after release.*

**ACTION:** *Add Dan Whetstone to the IOUCA working group meeting invitation.*

**Assigned To:** *Debbie Schwartz*

**Due:** *March 14, 2006*

**Update:** *Dan Whetstone and Rick Vagg were added to the meeting invitations.*

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

**Assigned To:** *Steve Clemons*

**Due:** *March 21, 2006 (Update)*

**Update:** *The California Enterprise Architecture Project (CEAP) is working on this.*

**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:** *March 28, 2006 (Update)*

**Update:** *Delayed update one week; dependent on completion of list of formats to begin.*

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

**Assigned To:** *Steve Clemons*

**Due:** *March 21, 2006 (Update)*

**Update:** *No update.*

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

**Assigned To:** *Steve Clemons*

**Due:** *March 21, 2006 (Update)*

**Update:** *No update.*

**ACTION:** *Provide a copy of the notes from the conference call with Center for Digital Government (CDG).*

**Assigned To:** *Debbie Schwartz*

**Due:** *March 21, 2006*

**Update:** *Waiting for permission to distribute from CDG.*

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

**Assigned To:** *John Jewell and Dan Whetstone*

**Due:** *March 21, 2006 (Update)*

**Next Steps**

**Kris Ogilvie, Debbie Schwartz**

Next IOUCA Meeting: March 21, 2006

Library & Courts II, 900 N Street, Room 340

9:00 – 11:00 a.m.