

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

Date: May 2, 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 type="checkbox"/> Steve Clemons (CEAP)	<input checked="" type="checkbox"/> Donna Freeman (FTB)	<input checked="" type="checkbox"/> Theresa Giles (DHS)
<input type="checkbox"/> Jeff Hillard (CDFA)	<input checked="" type="checkbox"/> John Jewell (CSL)	<input checked="" type="checkbox"/> Patrick Johnson (DOR)
<input type="checkbox"/> Anamarie Malone (DTS)	<input checked="" 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"/> John Quijada (DMV)

Review Minutes from Previous Meeting

Debbie Schwartz

The minutes for the April 25th meeting were approved with no changes.

IT Leaders Meeting

John Jewell

IT Leaders meeting was held on April 28, 2006. There was a good turnout including people who don't normally attend the IT Leaders meeting. Feedback was positive; people felt the meeting gave them an opportunity to hear information they do not normally hear. Steve Branson received requests for copies of the cascading style sheets he used in his demonstration; he provided the style sheets with the caveat that they are intended as training materials NOT state standards. Department of Rehabilitation has been receiving calls from departments interested in the accessibility training they will be providing in August and September. John noted that this is the first time we have presented information to the people who will be implementing policies.

Recommendation on New Template Design (Design 1)

Debbie Schwartz

The FTB template (Design 1) has been evaluated for accessibility and usability. The group discussed whether we were ready to make a recommendation to the State Portal Steering Committee or if additional review were needed in areas that may present barriers for other departments (e.g. graphics). The working group discussed whether we should be presenting a recommendation or an evaluation – providing feedback on the template from an accessibility and usability standpoint. It was agreed that the IOUCA would present an evaluation to the State Portal Review Board at their meeting on May 12, 2006.

Top Level Standards, Guidelines, and Best Practices - Accessibility

Neal Albritton

Neal provided a draft of the accessibility standards and guidelines he prepared. The standards encompass Section 508 and W3C Levels I and II. The document also provides additional recommendations for incorporating W3C Level III and links to different techniques for implementing the various standards and recommendations. Design Media will review the draft.

The accessibility training sessions probably won't go into the level of detail provided by the recommended standards, although the training will address all standards at a high level. The training approach is how to create an accessible website rather than a step-by-step process. Training classes will cover the what, why, and how to begin for accessibility with the standards providing detailed instructions in how to implement. DHS will provide Neal with some of the working examples they use in their training.

It was recommended that the following also be addressed:

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1. How we plan to keep the standards current (add a section at the end of the recommendation on accessibility).
2. Frequently asked questions – what are the common questions and problems people encounter and how can they be addressed. This should be separate from the standards.
3. Guidance on evaluation tools (e.g., Bobby), their limitations, and how they should be used. Automatic checking tools only catch approximately 80% of accessibility problems; the remaining 20% of problems require skilled human review.

***ACTION:** Flag standards and recommendations that may present barriers for implementation.*

***Assigned To:** Neal Albritton*

***Due:** May 9, 2006*

***ACTION:** The DMV Web Development Team will review the draft recommendation for workability, possible barriers and problems, and questions.*

***Assigned To:** John Quijada*

***Due:** May 9, 2006*

Components of a Recommendation

Debbie Schwartz

The working group reviewed an outline of components for recommendations to the State Portal Review Board and Steering Committee. The focus of the recommendations should be on direction, not providing an implementation plan. We will make general recommendations in broad areas (accessibility, usability) with areas that may prove problematic highlighted. Debbie will work on developing a template using the components.

1. What...
2. Why...
3. Benefits
4. Scope of implementation
 - Affected pages?
 - Proposed timeframes if appropriate
 - Level of importance
5. Barriers to implementation
6. Recommended standards and guidelines
7. Reference models
 - Existing pages
 - Future pages
 - Templates
 - Downloadable code repository
8. What training and/or resources are available to webmasters?
9. Vetting process

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- Who is reviewing/has reviewed

10. Glossary and/or resources

Working Group Teams

Debbie Schwartz

The working group agreed to establish three working teams to focus on accessibility, usability, and style sheets over the next several weeks. Working group meetings will be shortened to 30-45 minutes, and then the group will split into teams for detailed review of proposed standards and recommendation development. A brief progress update is planned for the State Portal Review Board meeting on May 12th with recommendations for accessibility, usability, and cascading style sheets send to the Review Board by the end of May for discussion at their June 9th meeting. If approved by the Review Board, the recommendations would then go to the Steering Committee for discussion at their July 14th meeting.

Accessibility

- Neal Albritton (leader)
- John Jewell
- Shayn Anderson
- Joni Ogata

Usability

- Donna Freeman (leader)
- Kris Ogilvie
- Liz Mechem

Cascading Style Sheets

- Steve Branson (leader)
- Theresa Giles
- Patrick Johnson
- Debbie Schwartz

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.

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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.

Action Items

Debbie Schwartz

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

Assigned To: *Donna Freeman*

Due: *May 9, 2006*

Update: *Donna handed out the table of contents from www.usability.gov. The site offers usability guidelines that are good quality and supported by what Donna learned from HFI. Donna will identify standards and guidelines that may benefit California but are not covered by www.usability.gov.*

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 9, 2006 (Update)*

Update: *Steve Clemons is in contact with Adobe. He will schedule a meeting when Adobe is available; California’s primary representative is on vacation.*

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 16, 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*

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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.

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

Assigned To: *Debbie Schwartz*

Due: *May 16, 2006 (Update)*

Update: *The outline of components for recommendations was discussed separately in the meeting; see discussion notes above.*

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

Assigned To: *Neal Albritton/Donna Freeman*

Due: *May 2, 2006 (Update)*

Update: *Complete.*

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

Assigned To: *Neal Albritton*

Due: *May 9, 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 Dan Whetstone*

Due: *May 9, 2006 (Update)*

Update: *In progress. John and Dan expect feedback from the April 28th IT Leaders meeting. They are working on defining an IT Forum. Some departments have expressed concern about how we will communicate with their webmasters and content managers; they want to be able to control the flow of information. We need an official list for communications.*

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.*

Next Steps

Kris Ogilvie, Debbie Schwartz

Next IOUCA Meeting: May 2, 2006

Library & Courts II, 900 N Street, Room 340

9:00 – 11:00 a.m.