

Section 508 Acquisition Tools Focus Group: Beyond Needs Assessment

- **What:** Notes on the eleventh meeting for this 2006 Focus Group
- **When:** Meeting held Tuesday, 11 July, 2006 9:00 am - 12:00
- **Where:** Hosted by General Services Administration (GSA) at GSA training facility room 3207B, 490 L'Enfant Plaza SW, Washington DC.
- **Who:** Attending this meeting
 - *Anteon*
 - Linda Broderson
 - *GSA*
 - Terry Weaver
 - *HUD*
 - Joel Dean
 - Clay Hutcherson
 - *ITIC*
 - Ken Salaets
 - *IRS*
 - T.J. Cannady
 - Billy Lyon
 - *SAIC*
 - *Monica Dussman*
 - *TecAccess*
 - Dana Marlowe
 - *Treasury*
 - Katie Haritos-Shea
 - *VA*
 - Bob Volck

1. Introduction

- a. Brief update on Buy Accessible release and distribution
- b. Brief review of previous meeting minutes and related issue log

⇒ Comments on Introduction and Background

- *Discussion on the issue of training Wizard users on the new and updated versions. We need more from release to release (including point releases) to inform the users about what to expect from new Buy Accessible releases. Suggestion to do like commercial software packages generally do and provide release notes that explain the changes for each new release. We could consider providing a walk through of new or changed screens to serve as release notes for the new version. However, text “read me” notes may provide a more accessible solution, and should be considered as a “mail out” announcement to key groups (e.g. 508 coordinators). Also discussed develop announcements based on our focus group slides to alert people of the changes coming. For casual users a clear note or indication on the Wizard home page that simply indicates the Wizard has changed and is different would suffice.*
 - *GSA has contracted (with Anteon) to develop training materials for Buy Accessible – this training is currently concentrating on Release 2.2. Any release notes should indicate what level of training is in sync with changes due to the new release*
 - *We have decreased the frequency of updates in our release schedule explicitly because of this issue – concern about familiar users getting disoriented by new Wizard features, functions, and/or look and feel.*
 - *We need to publicize the new Website <http://www.buyaccessible.org> as a source of information for agencies about new releases of the Buy Accessible System. We are working to develop a good FAQ here, and*

plan to provide updates about both changes in functionality and changes in appearance. Suggestions and comments are requested.

- *Recognition and general agreement that there is still a need for someone in the role of agency Wizard guru.*
- **Review the status of the Standing Continuous Improvement Issues Log:**
 - **⇒ Issue 1 (Nov 17): Single Independent Glossary as a web service** - we currently have two copies of the glossary definitions, and they are not in sync. We are continuing work on unified glossary content with an independent glossary application that operates as a web service.
 - **Status:** **active** design/development as continuous improvement
 - **Target:** Wizard Version 3.0 – October 2006
 - **⇒ Issue 2 (Nov 17): Wizard local file save option for the Internet configuration** - the capability to save Wizard session data locally at the client machine.
 - **Status:** **active** design/development as continuous improvement
 - **Target:** Wizard Version 2.2 – July 2006
 - **⇒ Issue 1 (Jan 25): Usability of the interface for interacting with the E&IT product and service taxonomy**
 - **Status:** **active** design/development as continuous improvement
 - **Target:** Wizard Version 2.2 – July 2006
 - **⇒ Issue 3 (Jan 25): ‘roadmap’ display where user is in Wizard process**
 - **Discussion:** There currently is text displayed in the upper right corner of each Wizard page that indicates “where you are” in the Wizard process. However, what is needed in addition is information about the total number of steps in the process, particularly the number of steps remaining from the current location. Providing information on where user is as a “step in the overall process” was preferred to a % complete approach by the group.
 - **Status:** **active** design/development as continuous improvement
 - **Target:** Wizard Version 3.0 – October 2006
 - **⇒ Issue 5 (Jan 25): the “fit” with existing systems / infrastructure / etc** - clarify how such issues are addressed in the Wizard.
 - **Status:** **open discussion** - where in the solicitation are these requirements reflected (or where should they be)?
 - **⇒ Issue 1 (Feb 8): rename ‘E&IT operations performance’ service type and ‘operations performance deliverable’**
 - **Discussion:** this issue was originally closed (Feb 22) – at that time all agreed to change these names to ‘E&IT task performance’ and ‘task performance deliverable’. It was later observed that the name “task performance” might raise confusion with some people because “task order” is a specific well-understood term. Thus the issue was again discussed, and closed again (April 5). However, it is decided to leave this issue open until R3 to allow for more understanding and wordsmith in the future.

- **Status:** *open discussion* – Currently all agreed to the following names for our set E&IT-related service deliverables:
 - “E&IT task performance deliverable” be renamed (again) to “E&IT support (labor hours)”
 - “Custom E&IT product deliverable” be renamed to “Custom E&IT end product”
 - “Information Content deliverable” be renamed to “Information Content”
 - **Target:** Wizard Version 3.0 – October 2006
- ⇒ **Issue 4 (Feb 8): Data Center promotion activity.**
 - **Discussion** on using the upcoming UNSPSC re-classification [see Issue 1 (Jan 25)] as part of promoting Data Center – discuss potential additional advantages of UNSPSC classification (beyond the use for Section 508 and the Data Center). However, any support for vendors to make the proper classification beyond that discussed in Issue 1 (Jan 25) is a post R3 effort.
 - **Status:** *active* design/development as continuous improvement
 - **Target:** Wizard Version 3.0 – October 2006
- ⇒ **Issue 1 (Feb 22): Wizard promotion activity.**
 - **Discussion:** Suggestions to consider showing the agencies that are using the Wizard (and thereby accessing the Data Center).
 - **Discussion** on using existing or possibly new training material that we could point to as part of Wizard promotion. Jim proposes that Skip add an aspect to Wizard promotion - clear linkages to Section 508 training and Buy Accessible Wizard training.
 - What tools, processes, etc. can the agency use to get people to the Wizard and not turn off early? This is mostly an issue for people outside the IT shop.
 - **Status:** *active* design/development as continuous improvement
 - **Target:** Wizard Version 3.0 – October 2006
- ⇒ **Issue 1 (April 5): Agency ‘in-house’ development in Wizard interface**
 - **Discussion** that in house developers should be required to go through the Wizard to develop web sites. There is a potential big bang for the buck in support for agency ‘in-house’ Website development. Government developers are often not very technically sophisticated and the Buy Accessible tools could help greatly. Also, the contractor may be able to use a similar sort of support to develop Section 508 conformant Websites, rather than relying on their own homegrown process.
 - **Status:** *open discussion*
- ⇒ **Issue 1 (June 27): Clarity of the initial “E&IT-related” questions:** We need to consider changing the initial Wizard E&IT qualification questions. A challenge is that users turn off before they even get in to the Wizard.
 - **Discussion** that people need to understand the issue of embedded E&IT. Discussion about the importance of taking an initial focus on questions about the planned deliverables. What is an E&IT-

related service? Users need to know that they need to think about E&IT in situations where it is not always apparent. For example, in situations where they are getting a report. Consider changes from a question like 'is it E&IT-related service?' to something like 'are you going to take possession of a deliverable that is EIT?'

- *Need to make sure that agency users recognize E&IT aspects of an acquisition that is not generally considered an "E&IT contract". For example, a service acquisition may be E&IT-related even if the acquisition is not primarily E&IT – for example, a study on how to grow tea may include a deliverable that is web-based training. The web-based training, being E&IT, makes the acquisition E&IT-related (S508 definition of E&IT includes support services that are E&IT)*
- *Status: **open discussion***

2. Types of Procurements and Associated Solicitation Documentation

- a. Acquisition types, solicitations, and the Uniform Contract Format
- b. Which differences matter for the Section 508 compliance process?

⇒ **Comments on Differences that Matter for Section 508**

- *Discussion on the reformatted two tables of 'differences that matter':*
 - *Table 1 is differences based on deliverable type, and focuses on the requirements and standards that need to be met. This is targeted primarily at the requiring official (although is sometimes important for contracting officials) and focuses on technical issues, accessibility considerations, and standard provisions that need to be met.*
 - *Table 2 is differences based on acquisition process, and focuses on the contractual requirements and what needs to be in the documentation. This is primarily targeted at the contracting officer (although is sometimes important for requiring official) and focuses on what you have to document for your contract file or solicitation.*
 - *Discussion on the difference (in table 2 - from a 508 point of view) between a simplified acquisition and macropurchase. It is the documentation requirements (forms and formats) that are the differences that matter. The Wizard can support different kinds of procurement processes, and it is important to use recognizable language (from the FAR) for contracting officials.*
- *Discussion on the distinction between regulatory requirements and accessibility considerations or best practices. What should the Wizard do differently relative to a consideration and a requirement?*
 - *Requirements are regulatory requirements from Standard and the FAR; the word "regulatory" should be included, suggestion to reword as "Section 508 Regulatory Requirements from Access Board Standard"*
 - *Section 508 Considerations" really means "things that are not direct regulatory requirements, but are important things for an agency to*

consider for an effective Section 508 compliance program.” These are good practice, but may not be regulatory requirements.

- **Discussion** on evaluation criteria and test criteria.
 - o *Evaluation criteria relate to the contract award. Evaluation criteria describe how you are going to evaluate proposals received in response to the solicitation.*
 - o *Test criteria relate to how you are going to test the deliverables and what criteria exist for acceptance of what is delivered.*
- **Discussion** on solicitation language intended to make vendors register their products and services in the Data Center. *Is this possible? Yes - and a good idea(!) depending on how it is done. For indefinite quantity contracts (e.g. Schedule, IDIQ, BPA) you can require that the vendor provide information to the Data Center. Note the GSA Alliant contract, as well as some in DHS, is trying to do this.*

3. Buy Accessible “Point 2” Release – More Sneak Previews

- a. Buy Accessible Wizard 2.2: re-engineering Market Research
- b. Buy Accessible Data Center 1.2: presenting the UNSPSC

⇒ Comments on ‘Point 2’ Release Sneak Preview

- **Announcement:** *Two biggest items planned for the 2.2 release are market research usability [Issue 1 (Jan 25)] and local user file save / reuse of local Wizard data [Issue 2 (Nov 17)].*
 - o *Incorporation of the UNSPSC as the new product taxonomy has been completed on the Data Center test bed. We need to distribute a mapping document that outlines the relationship between old and new categories in the old and new taxonomies. Each vendor will be contacted and encouraged to verify or change the assigned UNSPSC codes for their registered E&IT products and services.*
- *Testbed URL for the Buy Accessible Wizard Release 2.2 Alpha is:*
 - o <http://baw.altarum.org/baw>
- *Testbed URL for the Buy Accessible Data Center Release 2.2 Alpha is:*
 - o <http://baw.altarum.org/DataCenter>

⇒ Comments on Planned Buy Accessible Wizard Release 3.0

- **Discussion** on the Wizard as a general procurement documentation tool.
 - o *If everyone were required to use the Wizard, then you would get a lot of people that would say ‘no this isn’t an IT contract’. We need a better definition of what is **not** E&IT.*
 - o *Maybe we need to make people do more with product description for even those items that are not considered E&IT. This would provide management information. Suggestion we make this an optional text field for users to describe the item(s) being acquired, not required which may result in the Wizard “forcing” input. That way it would be up to each agency to decide what to require or not in this respect. We could collect the information as part of the management reporting capability.*

- **Discussion** on administration of the GSA-hosted database in Wizard R3.
 - o How user names and passwords will be administered is an issue.
 - o The administration of the GSA hosted data store should be distributed. Decentralizing this responsibility to agencies makes a lot of sense.
 - o We must have an interface for an agency administrator. We may want to provide an alert for government users to determine if they have an agency administrator that can give them a password and login.
- **Discussion** on what the Wizard needs to support in terms of agency acquisition management reporting. The DoJ survey may be a good starting point.
 - o Some agencies capture award data in addition to pre-award (solicitation) data like the Wizard is capturing. Is there a way to have mgmt reports follow through to award? We often lose the connection between Section 508 data captured during solicitation and data about the final award.

4. Next Steps

- a. Integrating Buy Accessible with the broader acquisition environment
- b. Focus Group goals, structure, process and near term plans

⇒ **Comments on Next Steps**

- **Announcement:** GSA intends to eventually host the entire Buy Accessible System, including both the Wizard (currently hosted by GSA) and the Data Center (currently hosted by GSA contractor).
 - o GSA will eventually host the Buy Accessible Data Center; the timeline for this move is not yet finalized. This planned Data Center move will require GSA to obtain a new security Certification & Accreditation (C&A). This C&A should give users confidence that the Data Center meets government security and privacy requirements. Vendors looking for the Data Center will find the current production system (Data Center 1.1) hosted at:
 - <http://emgbaw.altarum.org/DataCenter/>
 - o **Note** that maintenance and governance of the information content of the Data Center is currently and will continue to be done by GSA – however, it may be that the administration and promotion of the Data Center throughout industry is a separable task (ref. current GSA

⇒ **Note this is the last focus group meeting (on Solicitation) for this fiscal year. THANKS TO EVERYONE for helping to make this series of meetings a real success (and fun, too)!**

⇒ **We expect to resume our Buy Accessible focus group meetings this coming October 2006. Watch for e-mail announcements, monitor buyaccessible.gov and buyaccessible.org, and plan your schedule – LOOKING FORWARD TO SEEING YOU THIS FALL!**