

# Electronic Government Portal Advisory Board (EPAB) Meeting Minutes

*EPAB Approved*

**Meeting Date:** August 27, 2024  
**Time:** 10:30 AM- 12:00 PM  
**Location:** Virtual meeting using Microsoft Teams

**Board Members in attendance:** Becky Gladstone, Ben Kahn, Bryan Cruz González, Adam McBride-Smith, Jennifer de Jong, Raelynn Henson, Sam Schwartz, Senator Aaron Woods

**E-Government Program Support in attendance:** Ying Ki Kwong (Program Manager, Enterprise Information Services), Jessica Maddox (Enterprise Information Services), Roger Anderson (Tyler Oregon)

ITEM, DISCUSSION
<b>Welcome and Introductions</b>
Chairperson Ben Kahn opened the meeting and provided an introduction. The Chairperson welcomed Board members, including newest board member Adam McBride-Smith. Ying Kwong conducted roll call and confirmed that the meeting had quorum with 7 of the 9 voting board members present.
<b>Approval of Minutes (May 21, 2024)</b>
Sam Schwartz motioned to accept the minutes, seconded by Senator Aaron Woods. All in favor and none opposed. <b>Unanimously Approved</b>
<b>E-Government Program Update</b>
<p><b>Ying Ki Kwong</b> – Provided the following updates to the board:</p> <p><b>Overview of EPAP Strategies</b></p> <ul style="list-style-type: none"> <li>Ying began by outlining the program's activities under the EPAB strategy document approved in early 2023, which comprises three strategies with various initiatives.</li> </ul> <p><b>Strategy 1: "Put People First"</b></p> <ul style="list-style-type: none"> <li>Focus on updating the <b>oregon.gov</b> platform to enhance accessibility and usability.</li> <li>Initiatives also aim to improve E-government program services and remove barriers to accessing state resources online.</li> </ul> <p><b>Current Activities</b></p> <ul style="list-style-type: none"> <li>Collaboration with prime contractor <b>Tyler, Oregon</b> continues, including planning investments in technical platforms.</li> <li>Work on upgrading the <b>oregon.gov content management platform</b> (hosted in a SharePoint Server environment by Tyler, Oregon) has begun and is in its planning stage. The work will progress over the next 12-18 months.</li> </ul> <p><b>Improvements in Tools and Services</b></p> <ul style="list-style-type: none"> <li>The <b>SitelImprove</b> accessibility testing tool will be upgraded, enabling quality assurance, accessibility testing, and content analytics of state websites.</li> <li>The <b>Zendesk</b> Help Desk information system has been updated to improve service ticket tracking and services delivery for client agencies.</li> <li>New web parts for the <b>SharePoint CMS</b> will be rolled out in two phases to improve user experience.</li> <li>A <b>file-sharing solution</b> and a forms solution are being explored to facilitate data sharing and business processes.</li> </ul> <p><b>Collaborations with PSU to better understand needs of Oregon Business Communities</b></p> <ul style="list-style-type: none"> <li>Collaboration with the <b>Hatfield School of Government at PSU</b> is ongoing under <b>Strategy 1</b> to survey Oregonians and research best practices for reaching historically underserved groups.</li> <li><b>Phase 3</b> of the study will focus on Oregon's historically underserved business communities, continuing efforts from previous years which focused on historically underserved demographic</li> </ul>

groups.

- **Business Oregon** (the state's economic and community development agency) is assisting with outreach to minority and women-owned businesses to ensure accessibility and usability of state services for diverse business communities.

### **Oregon Digital Equity Plan**

- **Business Oregon** will update on the Oregon Digital Equity Plan, and the E-Government program plans to support its implementation by providing needed services.

*Presentations from Tyler Oregon General Manager Roger Anderson, the Portland State University team, and Board Member Adam McBride-Smith followed. They offer further details and insights into ongoing projects and collaborations of the E-Government Program.*

### **Tyler Oregon Update**

**Roger Anderson**, General Manager – Tyler Oregon

#### **Summary:**

*Shared updates on new and ongoing investments in SharePoint, SiteImprove, and Zendesk. Detailed plans for SharePoint migration and upcoming accessibility initiatives. Emphasized Tyler Oregon's focus on improving file-sharing capabilities and piloting new web content management (CMS) tools. Introduced new Director of Operations, Neha Parashar.*

#### **1. Investment Areas for 2024:**

- **Ongoing Investments:**

- **SharePoint CMS Environment:** Continued support for SharePoint 2016 and transition to SharePoint Subscription Edition over the next 24 months.
- **Zendesk/Service Desk:** Upgrading to enhance monitoring for service desk operations, enabling better coordination with Tyler Oregon.
- **SiteImprove:** Adding functionality for website accessibility and analytics in preparation for compliance with federal ADA accessibility rules by 2026. This supports the SharePoint CMS used to host state websites.

- **New Investments:**

- **Research Collaboration (Phase 3):** Ongoing work with PSU Center for Public Service
- **Connected Oregon - File Sharing:** Exploring file-sharing solutions between state and local governments, considering Tyler's Content Manager and third-party options.
- **Web CMS Pilot:** Testing an alternative web CMS platform for E-Government sites, an effort that is unrelated and in addition to the migration to a new version of SharePoint CMS.
- **Enterprise Tools:** New online form tool and new SharePoint web parts for enhanced web content and user experience.

#### **2. Business Activity Update:**

- **Tyler Oregon Website**

- Launching a new website as part of the final stage of rebranding under Tyler Technologies after acquisition of NICUSA ([tylertech.com/oregon](http://tylertech.com/oregon)).
- Simplified design and improved functionality, including a service desk link and engagement forms for new projects.

#### **3. Operations Update:**

- **New Tyler Oregon Director of Operations, Neha Parashar**

- Introduced as the new Director of Operations. Neha has extensive experience across various facets of Tyler Oregon's business and holds a master's degree in computer and electrical engineering. She will take over operational updates in future meetings.

### **E-Government Survey (Phase 3) Update**

**Jillian Girard**, PSU Hatfield School of Government Team Lead

#### **Summary:**

*Jillian Girard's update focused on Phase III of the E-Government Project. This phase investigates how businesses, particularly those from underrepresented communities, interact with Oregon's online government services.*

#### **Center for Public Service Team and Project Support**

- **Key Contributors:**

- **Diane Odeh, MPA:** Research assistant and project associate, contributing through experience in housing infrastructure and civic engagement.
- **Carl Christiansen, MPA:** PhD candidate with a focus on nonprofit organizations, assisting with data analysis and assessment.

- **Project Leads:**
  - **Veronica Cano, PhD:** Senior Fellow and expert in research methods and policy analysis, who led Phase II.
  - **Jillian Girard, PhD:** Lead Analyst and Project Manager, overseeing data collection and analysis for Phase III.

#### **Background on the Center for Public Service**

- The **Center for Public Service (CPS)** operates within the Hatfield School of Government at Portland State University, contributing academic rigor to public service projects while involving students in hands-on learning opportunities.
- CPS supports research and practical projects that benefit students and the wider Oregon community. It brings academic rigor and a neutral stance to the research and analysis process.

#### **Project Background and Phases**

- **Phase 1 (2022):** Provided broad quantitative insights, highlighting disparities in access and experiences based on race, ethnicity, disability, immigration status, and language barriers. Additional focus on the business community was identified as a need.
- **Phase 2 (2023):** Focused on race, ethnicity, and language barriers, specifically for immigrant populations.
- **Phase 3 (2024):** Aimed at gathering feedback from businesses, particularly underrepresented groups, on the accessibility of Oregon's E-Government services.

#### **Phase 3 Goals and Investigation Areas**

- **Primary Goal:** Collect feedback from businesses in Oregon, with a particular focus on historically underrepresented communities (BIPOC, women-owned, veterans, individuals with disabilities, etc.).
- **Key Areas of Investigation:**
  1. **Assess experiences** with current online business resources.
  2. **Evaluate** the **accessibility** of these resources in terms of language and disability accommodations.
  3. **Understand** how businesses view new technologies (e.g., AI) and future opportunities for improvement.
  4. **Review differences** based on business and personal demographics.

#### **Data Collection and Sampling**

- **Methods:**
  - **Surveys** available in multiple languages (e.g., Arabic, Chinese, Hindi) to capture diverse business operators' experiences.
  - **Interviews** with key individuals who have insights into business operators' use of E-Government services.
  - **Focus groups** with business owners to understand their experiences more deeply.
- **Sampling Approach:**
  - Open to all business operators in Oregon, with outreach focused on BIPOC communities, veterans, women-owned businesses, and economically distressed areas.

#### **Discussion Insights**

- **Research Integration:** The project is not only practical but also serves as a training platform for PhD students like Diane and Carl, allowing them to apply their methods knowledge.
- **Feedback on Business Needs:** There was concern that many businesses feel state websites are not serving their needs adequately, which is a priority focus for this phase of the project.
- **Improvement Areas:** Participants expressed interest in identifying agencies that cause bottlenecks and providing concrete, actionable recommendations based on the study's findings.
- **Stratification of Findings:** Suggestions were made to stratify findings based on business age, revenue, and other characteristics to better understand the diversity of needs within the business community.

*Girard responded positively, confirming that most of these suggestions were already part of the investigation framework, though some aspects, such as business size, would be addressed differently than requested.*

#### **New Federal Rule for Web and Mobile Accessibility**

**Adam McBride-Smith, Oregon Health Authority / Board Member**

**Summary:**

Adam McBride-Smith (newest EPAB member) shared a brief introduction of himself and presented "Introduction to Digital Accessibility in Oregon." He covered the evolving legal landscape surrounding digital accessibility and outlined new federal regulations affecting web and mobile accessibility for state and local governments. McBride-Smith's presentation emphasized the urgency of complying with federal digital accessibility rules, the ongoing challenges within Oregon, and the need for a more centralized and structured approach to ensure compliance by the 2026 deadline.

#### **Introduction to Adam McBride-Smith (he/him):**

- Certified expert in digital accessibility with credentials from the International Association of Accessibility Professionals (IAAP).
- His current role is as a **Digital Accessibility Strategist** for the Accessibility, Inclusion, and Education Unit at the **Oregon Health Authority**.
- Adam has consulted on digital accessibility for various government and non-profit entities and taught the subject at Portland State University.

#### **Digital Accessibility: the Legal Landscape**

##### **Evolution of Legal Requirements**

- The **ADA (1990) & Section 504 of the Rehabilitation Act of 1973** predate widespread use of the internet.
- DOJ has enforced the ADA applies to state/local government web content under **Title II** since 1996.
- Recent updates emphasize **increased enforcement** of these laws.
  - Example: A settlement with New York State (2020-2022) regarding inaccessible COVID vaccination websites.
  - Similar case: Oklahoma (inaccessible Medicaid app), settled early 2023.
- DOJ announced intention to publish a **Notice of Proposed Rulemaking (NPRM)**

##### **Recent Updates to the ADA and Section 504**

- **July 25, 2023:** DOJ published a Notice of Proposed Rulemaking on web accessibility for state/local government entities.
- **April 24, 2024:** DOJ final rule published.
- **May 9, 2024:** HHS published a rule on nondiscrimination based on disability under Section 504.

##### **About the New DOJ and HHS Rules**

- DOJ rule applies to all digital content produced by or for the state of Oregon, including vendor-produced content.
- HHS rule covers all entities receiving federal healthcare funding, including the Oregon Health Authority (OHA).

##### **Details of the New Rules**

- Both rules require compliance with **WCAG 2.1 Levels A and AA**.
- States have a 2-year timeline for compliance (DOJ deadline: **April 24, 2026**).
- Rules cover conventional electronic documents like PDFs, Word, PowerPoint, and Excel files.
- Oregon, with a high volume of documents, faces a major compliance challenge.

##### **The Digital Accessibility Policy Workgroup**

- Formed in **November 2022** to draft accessibility policies for OHA and ODHS.
- Participants include members from OHA, ODHS, DAS, Oregon Broadband, Oregon Commission for the Blind, etc.
- Two policies in final draft form:
  - **Accessible Content Creation**
  - **Procurement of Accessible Content**
- These will be presented to the Joint Policy Committee on September 9, 2024, and, if approved, will take effect on November 1, 2024.

##### **Challenges Facing Oregon**

- While Oregon's E-government pages have improved, many procured digital content are not **WCAG compliant**.
  - Example: The Global Accessibility Awareness Day presentation in May highlights ongoing issues.
- Automated testing (via SiteImprove) identifies about **30%** of WCAG violations; manual testing is required for the remaining **70%**.
- Oregon heavily relies on documents (e.g., **30,000 PDFs** at OHA), most of which are not WCAG conformant.

- Oregon lacks a **statewide digital accessibility policy** and a centralized program, creating delays in accessibility progress.

#### **Next Steps and Call to Action**

- Adam proposed a follow up **demonstration** for the board and E-governance teams in September/October, focusing on the technical aspects of WCAG conformance.
- He proposed a future **call to action** for the EPAB board to advocate for a **statewide digital accessibility policy** and a **centralized program**.

*Chair Kahn concluded with an appreciation of Adam's work, highlighting that some state websites like the Oregon DMV have started making accessibility improvements, and welcomed the proposal of having Adam present a follow up demonstration.*

### **E-Government Operations & Projects Update**

**Roger Anderson**, General Manager – Tyler Oregon.

#### **Summary:**

*Roger Anderson provided an update on several key E-Government projects, including the release of Newsroom 2.0, which allows for regular updates and upcoming subscription functionality. He highlighted progress in transitioning to Elavon for e-commerce services and the ongoing migration from SharePoint 2016 to the Subscription Edition, which will affect over 100 agency websites by 2026. New updates to the SharePoint CMS template, custom applications, and various website redesigns were discussed, along with upcoming e-commerce integrations and opportunities for mobile applications and alternative web CMS pilots.*

#### **Enterprise Projects**

- **Newsroom 2.0**
  - Released on March 26th, 2024.
  - Regular updates can be made, with an upcoming feature allowing users to **subscribe** to agency topics for **email notifications** (targeting Q3/Q4 for release).
  - Integration of the official **Oregon State banner**, aligning with other Oregon.gov websites.
- **Monetra to Elavon E-Commerce Transition**
  - Ongoing project to transition the state's e-commerce system from Monetra to Elavon.
  - **Challenges** are being addressed, with recent progress indicating that the project is moving forward.
- **SharePoint 2016 to SE Migration:**
  - Moving 100+ agency websites to SharePoint SE.
  - Group **migration planning** began in June 2024.
  - Migrations expected from **Q3 2025 to Q2 2026**, with a goal to move all websites by June 2026.

#### **New Releases**

- **SharePoint CMS Template Updates**
  - Version 4.15.8 released in June with navigation improvements and a Google Analytics 4 update.
  - Version 4.15.8.2 (July) introduced Cloudflare reCAPTCHA, replacing Google reCAPTCHA.
- **Custom Applications**
  - Updates to the **Classification and Compensation App**, including eight product support updates.
- **Websites**
  - **Usability testing** for the DOR website and **redesigns** for the Commission for the Blind and the Independent Contractors Board websites.
- **E-Commerce Integrations**
  - Ongoing projects with State Lands, OSLAB, and OSBGE for **payment integrations**.

#### **Projects In Progress**

- **E-Commerce Integrations:** Continued development for State Lands Customer Payments and others.
- **Applications:** Treasury Trust Intake Forms to launch soon; DHS/OHA Personal Injury Liens Program Data Transfer.
- **Websites:** Redesigns for ODA and ODOT, with updates to web parts in progress.

#### **Opportunities**

- **Websites:** Exploring alternative Web CMS pilot projects and redesigns for Criminal Justice

Commission, OHA, Aviation, DOGAMI/Tsunami Clearinghouse, and SOS websites.

- **Mobile Applications:** Tyler Technologies' "My Civic" platform for mobile app development, with potential agency collaborations.
- **E-Commerce Integrations:** Upcoming integrations for Higher Education and Department of Early Learning payments.

**Questions and Discussions:**

- Becky raised a question about the feasibility of developing a website that would allow Oregon citizens to input their address and view their representatives. She emphasized the need for more data sharing to make such a tool possible.
- Becky encouraged interested members to contact her for further discussions. She will explore opportunities during the upcoming legislative session to address the data-sharing issue for the representative lookup tool.
- Roger acknowledged the possibility but highlighted that the main challenge lies in data presentation across different agencies.

**Next Steps:**

- Continued progress on enterprise and e-commerce projects.
- Ongoing SharePoint SE migration planning and implementation.
- Exploration of mobile application and e-commerce integration opportunities.

**Public Testimony**

None

**Meeting Wrap-up and Adjournment**

**Announcement by Dr. Schwartz:**

- Dr. Schwartz announced that he has successfully defended his dissertation in the past quarter but holds the EPAB's student seat. He was originally appointed until 2027. He will be in discussions with the governor's appointments office to determine next steps; Resign immediately? Remain until another student is appointed? Or, serve out his full term until 2027. He expressed gratitude for his time on the board and described it as a pleasure to serve.

**Closing Remarks:**

- Chair Benjiman Kahn thanked Dr. Schwartz for his service on the board.
- It was noted that the presentation by Leina of Business Oregon would need to be rescheduled for the next meeting.

*The meeting was adjourned with Chairperson Kahn thanking all participants and looking forward to seeing everyone next quarter.*

**Action Items:**

None