



CommonLook
CAMPUS 101



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A Case Study

CSU Pilot Project: CommonLook Campus 101
Campus Wide Solution For Document Accessibility



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CSU Pilot Project for Accessible Documents Combines Innovation and Collaboration

One of the most common things those of us at CommonLook hear is that an organization has invested significant funding in technology to support the creation and remediation of PDF documents but the technology sits idle on computers.

While CommonLook provides on-site and online training for our products, sometimes it just isn't enough.

The CommonLook Campus 101 Program is an innovative approach to finding collaborative solutions for academic organizations that will encourage the creation of accessible Microsoft Office documents and reduce remediation time for accessible PDF documents.



*Accessibility is not just good will,
it's good business.*



In terms of the importance of inclusive education, the World Bank states that for every year spend in school, a person with a disability has the potential to increase their income by 10%.



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Background

Led by Cheryl Pruitt, Director of the Accessible Technology Initiative, the Chancellor's Office at California State University (CSU) approached CommonLook, the world's leading developer of PDF accessibility solutions and services, with a simple question: How can you help us make sure that the technology purchased is used effectively and consistently to provide accessible Microsoft Office documents and tagged compliant PDF documents?

Our enthusiastic response has resulted in a two year collaborative pilot project that can be used as a blueprint to assist other academic organizations in ensuring that Microsoft Office documents and PDF documents are accessible to the broadest range of people on campus.



Inclusive education means that those of us with disabilities have equal access to all digital content and environments.



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CSU Policy

CSU has an overarching policy on accessible PDF documents that comply with Section 508 and eventually the Refresh of Section 508. However, each campus is autonomous in implementing the policy and determining its own timeline for compliance.

The CSU system is made up of 23 campuses across the state of California. CSU wanted to start the project with the Chancellor's Office and then bring campuses on board two at a time with the Campus 101 Program.

In having the Chancellor's Office as the starting point, CSU clearly identifies the increased need for training on creating more accessible PDF documents. The Chancellor's Office provides a leadership role for other campuses in the CSU family.

The documents produced by the Chancellor's Office are slightly different than those you might find in other departments and campuses. They are primarily reports, memos, policy papers or program related.

This made the Chancellor's Office a great place to start the project.





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The Collaborative Process

For the past two years, CommonLook staff have been working collaboratively with CSU staff, carefully listening to the needs of the Chancellor's Office and the staff who are participating in the project.

Meetings were held every Friday with our staff and staff at CSU. Components of the program were discussed, evaluated, approved, and implemented. The discussions continued throughout the pilot. Every component of the program was analyzed in order to fine tune the resources and the needs of the Chancellor's Office staff.

One of the results of our discussions was a way to provide an initial five concurrent licences for CommonLook Office GlobalAccess and five concurrent licenses of CommonLook PDF GlobalAccess for a pool of twenty staff. This means that at any given time, five staff members can be working to make Microsoft Office documents accessible and five can be working on remediating PDF documents.

One of the needs identified as a result of the licenses and training for CommonLook Office GlobalAccess was the need for training on what the elements of an accessible Word or PDF document are. For us, this opened a new opportunity to listen and collaborate on solutions.



*Collaborating with CSU staff lead to **tangible benefits** for everyone involved.*



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The Campus Project Components

CSU was responsible for setting up a portal or website that contains all of the training material provided. Development begins on the portal at the same time collaboration begins so that once the details are clarified, staff can be ready to access the tools they need.

CommonLook trainers provided a series of five webinars lasting 90 minutes each with 60 minutes of instruction and 30 minutes of questions and answers from participants.

The use of webinars to deliver the training provided two opportunities for cost saving: there were no travel costs associated with bringing trainers on-site, and busy staff had the flexibility to learn at their desks.

The first two webinars provided training on CommonLook Office GlobalAccess while the remaining three provided training on CommonLook PDF GlobalAccess.

As part of the pilot, CSU purchased 5 concurrent licenses each of CommonLook Office GlobalAccess to assist with remediating Microsoft Office documents to convert to tagged PDF documents; and 5 concurrent licenses of CommonLook PDF GlobalAccess to ensure that PDF documents are accessible.

CSU purchased training time and custom material including short videos to assist staff in using the tools in a way that may be unique to their campus culture and ecosystem.





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The Campus Project Components, *continued...*

The CommonLook trainer lead webinars were conducted two days a week using Zoom as the webinar delivery tool. CSU decided to record the webinars and archive them on the portal/website for the project. We see this as a great option for other campuses as the program is adopted by other colleges, universities and organizations.

Even though CSU records the webinars, each webinar is done as an individual training session complete with new content and new questions from participants. As questions are asked and answered in the last 30 minutes of each webinar, content is revised for the next webinar to reflect areas where clarification and/or additional steps may need to be added. The questions and answers are also recorded in an FAQ page on the portal/website so that participants can review them as needed.

The interactive nature of the webinars along with the timely revision of content for the next webinar promotes interest by staff and encourages them to continue with their learning.

The questions that have been raised have added to our understanding of how people learn how to use our technology and how they thought, and think, about accessible document design.



Webinars can be **recorded and archived** on a portal or website.



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Lessons Learned

We discovered that one of the problems with ad hoc training in an academic environment is that there isn't often the opportunity to learn why you are doing something. This can be of equal importance to understanding how to use a technology and/or technique.

For example, those of us at CommonLook started the project thinking that everyone knows how to use Microsoft Word. The reality is that people only know how to do some things in Word and how they create Word documents depends on their initial training or lack thereof.

This affected our approach to the webinar series. For most participants, we were starting training without checking the knowledge base of applicants which

impacts their ability to create more accessible Word documents (using styles, headings, creating proper lists, adding Alt text to images and creating accessible hyperlinks).

We quickly discovered that, at times, participants were frustrated, confused and falling behind in their training. Working closely with CSU, CommonLook trainers revised the first webinar content to meet the needs of staff. The preliminary webinar guides participants through the basic features of a more accessible Word document. This gives them the cornerstone content needed to complete the foundation training.

We examined this approach with CSU staff and provided sample documents prior to the preliminary Word training so that participants were familiar with





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Lessons Learned, *continued...*

the content and how the sample documents were structured. This allowed participants to have the sample documents open during the preliminary webinar on basic Word document accessibility and follow along with remediation techniques. Completed tagged PDF documents were provided so that as participants worked through the process using the basic techniques for Word document accessibility to using CommonLook Office GlobalAccess to converting the Word document to tagged compliant PDF, they could review and compare results with their own work on the sample documents.

So as to not further overwhelm or confuse the participants in the pilot program, we removed some of the more advanced content from the Word and PDF remediation webinars and focused more on the basics.

We did, however, provide additional training materials, resources, and options, so that participants could address more advanced document issues on their own time and at their own pace.

There were other lessons learned including lessons related to the evaluation and metrics solution developed by CommonLook.



The goal of the Campus 101 Program is to train staff to do the bulk of the PDF document remediation themselves with options for additional support and services when needed.





Evaluation and Metrics

As part of the Campus 101 Program, a Reporting Utilization Tool was created to track the usage of the licenses. As with any pilot project, a way to measure success is needed for budget and buy-in from other campuses or departments.

The creation and deployment of the Utilization Reporting Tool was another lesson learned and opportunity to listen and collaborate with CSU. Our interpretation of what the Utilization Reporting Tool should do was different from what emerged as the eventual requirements. The requirements were sent to our development team who worked diligently to include them in the next iteration of the reporting tool.

The Utilization Report provides quantitative evidence that the institution is actually using the software in the event of legal action and follow-up to make sure the users thought to be using the tool are really using the tool.

The results of this reporting tool will provide the information needed at the end of the year of the program to determine the need for additional licenses and a continuation of additional supportive services.



*The Utilization Report provides **quantitative evidence** of software use.*



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Supportive Components

In working collaboratively with CSU staff like Cheryl Pruitt, we discovered the need for ongoing support for staff.

As part of the Campus 101 Program, ongoing support for brief questions and clarification is included in the original scope of the Campus 101 Program.

The additional features are provided in the form of:

1. An option to collaborate on an Advanced Training Module.
2. Power Support option for complex documents.
3. Remediation services for high volume or very complex documents.



The bottom line is that in order to think of ourselves as anything other than having a disability, we must be included in the learning environment as equals and not considered “add-ins” that require special treatment/ accommodation as the norm.

Accommodation for those of us with disabilities should be the exception rather than the rule/norm. Technology can level the playing field and we need to start leveraging that goal of inclusion.



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Summary

This is the first time that an extensive collaborative project to provide an overarching solution on the need for accessible PDF documents has been undertaken by a leading university (CSU) in cooperation with a leading provider of PDF accessibility tools (CommonLook) and services. The progress made and the experience developed should prove invaluable to CSU and to other universities as they grapple with the challenges of document accessibility.

The ramp up time has been two years, primarily because the staff at both CSU and CommonLook wanted to make sure that all of the needs for the Chancellor's Office and participants were addressed so that the program can be highly effective and as easy as possible to duplicate in individual campuses.

As CommonLook trainers moved forward in providing the webinars and training material, we found that there were components that needed further exploration and diverse ways of implementing them. For example, the need for training on what the basics of a more accessible Word document are.

Those of us at CommonLook anticipate that for future implementation of a Campus 101 Program the ramp up time will be reduced to six months and the actual program will last for twelve months and then be reviewed based on the metrics from the Utilization Reporting Tool.

For those of us at CommonLook, the key is in listening to the needs of our customers and not being afraid to venture into new territory!



CommonLook.com

A blue, rounded rectangular button with the text 'CommonLook.com' in white. A white hand cursor icon is positioned over the right side of the button, pointing towards the text. The button is set against a background of several overlapping, light gray rectangular shapes that resemble document pages.

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*When it comes to document accessibility,
we think everyone should be on the same page.*



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