4/12/2013

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| Accessibility for a Better RoadRunner | Mugsy Bros |



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| Policy Briefing | RoadRunner Financial Services & Financial Software |

 Roadrunner Financial Advisors

& Financial Software

Policy Brief: Company-wide Accessibility

# Mission Statement:

The Mission statement for RoadRunner Financial Advisors & Financial Software is: “We are small, but we are faster, smarter, and better. We strive to meet our customers’ investment and advising software goals, but do not put immediate profitability above sound, long-term investment strategy. We take care of our customers and we take care of our employees. Our goal is to be an eight-star company in a five-star world. We give you less Acme and more Meep-Meep!”

# Accessibility and Mission:

Having a more accessible company both internally (with training, technology and policy) and externally (by choosing vendors dedicated to accessibility) will be a contributing factor to make RoadRunner the eight-star company it wants to become. With a new accessibility policy it will become a leader in the financial services market in social responsibility by keeping personnel who may have become otherwise sidelined by disability, opening new doors for new employees, and by making investment opportunities for new customers.

# Needs Assessment:

* Loss of experienced personnel due to disability without accessible technology in place
* Need for accessibility for growing population of older clients: “[By 2030, the number of U.S. adults aged 65 or older will more than double to about 71 million](http://www.cdc.gov/aging/emergency/general.htm).”
* In 2010, the U.S. Census counted “[18.7 percent of the 303.9 million people in the civilian noninstitutionalized population that year](http://www.census.gov/prod/2012pubs/p70-131.pdf)” as having a disability. This is a huge segment that is often overlooked in business and services.
* [“In the year 2011, an estimated 19.1 percent (plus or minus 0.32 percentage points) of non-institutionalized civilian veterans aged 21 to 64 years reported having a VA service-connected disability in the United States.”](http://www.disabilitystatistics.org/reports/acs.cfm?statistic=10) Many veterans, without jobs when they return, are using federal opportunities to start businesses.
* Public relations value with new customers as a socially-conscious company
* Accessible choices create greater compatibility with mobile technology use, which will continue to grow in all sectors (“[Mobile to overtake fixed Internet access by 2014](http://www.smartinsights.com/mobile-marketing/mobile-marketing-analytics/mobile-marketing-statistics/)”).
* SEO optimization can be immediately increased with HTML policy requiring accessibility, thereby improving RoadRunner’s position in online searches

# Organizational Solutions:

1. The leadership, including the CEO and President, the Roadrunner family who owns the company and the senior executives, have all vowed to make the company as accessible as

quickly as possible. This is initially due to the personal and immediate need of a trusted colleague, but implementation will benefit the whole company.

1. After the proposal has been reviewed company-wide, a new office will be established to both initiate and sustain all accessibility policy recommendations. For some aspects of the accessibility department, it is encouraged that current employees to volunteer to be transferred to this department.
2. To maintain the RoadRunner mission, an experienced Financial Advisor will be appointed the lead for this effort. It is important that no salary loss occur with this transfer, so that the position will be fully understood to be equal in importance with the financial advisement section. For this reason, in addition to a base salary, and additional percent the total of all advisor’s commissions should be part of the salary package for this position. This will not cause a loss to the current advisors, but will be a percent taken out of the company’s portion. This position will be permanent, full-time, and with full benefits.
3. Company training for any implementation, should it be necessary, will be paid for by the company, taken on company time, and will be part of a bonus system for training. Certification will be by assessment of the vendor’s learning management system, and will be used to verify the employee’s participation.
4. No jobs will be cut as an effect of this new policy. Neither should it affect pay except to increase it through the possibility of new training bonuses, and new markets.
5. RoadRunner will pursue contracts with third-party vendors who have strong accessibility policies of their own; by verifying what levels of accessibility are in place, we strengthen our own commitment to accessibility. A checklist for vendors can be found at [e-Accessibility Toolkit](http://www.e-accessibilitytoolkit.org/toolkit/local_government/Integrate_accessibility_into_IT_governance_project_management_procurement_processes).
6. Accessibility skills will be considered prominently for new hires.
7. Social commentary about the company on blogs, websites, and in review sites should not be less critical of us than we are of ourselves internally. The comments made concerning our service in social media should be superlative, based on what we are actually doing, not what we say we will do.
8. For any employee with a disability, we will provide at company expense, screen-reader software, speech-recognition software or other available technologies, and any physical accommodations that are reasonable, within the office space or at home.
9. To meet the highest standards of accessibility, guidelines in place we will use are [WCAG 2.0](http://www.w3.org/TR/WCAG20/), developed by the [Web Accessibility Initiative](http://www.w3.org/WAI/intro/wcag.php) (WAI) (to AA, preferably [AAA level of WCAG 2.0](https://www.webaccessibility.com/best_practices.php?standard_id=612)).
10. A new survey will be created for customers specifically about the advisor/technology specialists’ commitment to accessibility. This will be anonymous, to encourage client participation, and will not be punitive to the employee, but be an extra bonus to the top three most dedicated to accessibility as a priority.

# Social Solutions:

1. Keep inner-office memos brief. Employees reading them with screen-readers have to listen to every word, so make them count.
2. Require meetings only when absolutely necessary; some employees work from home and to travel in to discuss a new business product is unnecessary. In cases of disability it can be an entire workday wasted, taking time to get to and from a frivolous meeting.
3. Do not disseminate company-wide information only verbally or at the water cooler. All relevant company-wide announcements should be emailed out on the listserv or on the internal website on a “News” page.
4. Keep hallways and office floors and aisles free of clutter for wheelchair access.
5. Be conscious of the fact that some of our clients have disabilities that we can easily accommodate. Some ideas are in this course from [ADA National Network “At Your Service: Welcoming Customers with Disabilities”](http://www.wiawebcourse.org/), which should be taken by all personnel.

# Technical Solutions:

1. Each employee will run the [WAVE Web Accessibility Evaluation tool](http://wave.webaim.org/) and the [AC Checker](http://achecker.ca/checker/index.php) on our website to view things that can be corrected.
2. New authoring software will be reviewed and purchased to [ATAG guidelines](http://www.w3.org/WAI/intro/atag.php).
3. A new website will be designed after purchasing the chosen software.
4. Prior to purchasing new software, all images on the website will be tagged with [ALT-Tags](http://www.w3schools.com/tags/att_img_alt.asp) and [LONGDESC tags](http://www.w3schools.com/tags/att_img_longdesc.asp), any flashing gifs or images will be removed, and text will be resized to at least 18 point font, except for any legal documents that shouldn’t be altered.
5. Any new web pages that need to be put up prior to the new authoring tool purchase should be designed with CSS. [Certification](http://www.w3schools.com/cert/cert_css.asp) is available now.
6. Training for HTML5 and CSS will be provided through the [W3Schools.com](http://www.w3schools.com/).
7. Check all PDFs (internal and external) with [Web Accessibility Best Practices](https://www.webaccessibility.com/best_practices.php?technology_platform_id=21).
8. Free Webinars are available and required by all technology department employees at [SSB BART Group site](https://www.ssbbartgroup.com/webinarregistration.php?id=1). Sign up immediately so you don’t miss the next free webinars.
9. Free tools and courses for Accessibility training is available for immediate download at [Microsoft’s Windows DevCenter](http://msdn.microsoft.com/en-us/windows/bb735024.aspx). See this page for tools and the [downloadable CD for their Accessibility course for Windows](http://download.microsoft.com/download/1/F/4/1F4C1601-64A5-459E-9E56-D492AD46011F/Tools_Training_CD.iso).
10. The above-stated solutions will be done on company time, and take precedence over all other projects except company technical emergencies.
11. Feedback mechanisms should be designed on new company products and web pages to receive ongoing client accessibility input.
12. The Technical Department will be responsible for assuring that accessibility is built into the company’s products from concept to prototype to quality control and deployment. They are uniquely positioned to best understand the issues and how to take care of technical problems, so will take the lead to assure the whole product’s accessibility.
13. An Intranet forum will be established to allow for updates on training, accomplishments, and questions.

# Management Solutions:

1. Technical Project Managers will only be assigned who have gone through all the technical training described above. Managers can only manage what they understand.
2. Project management cycles should be developed with accessibility design and adaptation built in. To understand what time may be needed to implement, deliverables and milestones may need to be adjusted.
3. Financial Advisor Projects Managers should view and understand the [Before and After demo at w3.0rg](http://www.w3.org/WAI/demos/bad/).
4. Training for the Financial Advisor Projects Managers will be provided in-house by our own technical department after receiving certification, since they already understand our products.
5. Milestones of RoadRunner Accessibility training to accomplish our goals of WCAG 2.0 AAA Level should be noted in company-wide memos.
6. Management will have access to the Intranet Technical forum developed for Accessibility gains and questions (see #13 in Technical Solutions), and will be able to ask and archive comments and questions there. Any internal concerns about issues with the website or financial services software should be posted there in the appropriate space (TBD).
7. To verify that accessibility is built into the development cycle of the company’s web site, during the development phase, a “Testing Week” will be set aside as an opportunity for all the managers (Financial Advisors Managers and Technical Project Managers) to be involved in the product design. During this week, a prototype of the company’s new website and new software product will be available to all managers to assess with a variety of online accessibility tools.
8. After the entire product development cycle and website design is accomplished, an appropriate (and affordable) company-wide “Accessibility Design and Launch Celebration” will be planned by the Project Managers department. Families are invited to join, and the company will have the celebration covered by the media as a way to promote our new initiative. Budget for the award celebration will be posted to the Management team at the beginning of next quarter.

# Evaluation:

1. Evaluating an accessible web site and software product is not a criticism of the product; it is a part of the development cycle. See [Usability Testing Demystified](http://alistapart.com/article/usability-testing-demystified) and the text [Rocket Surgery Made Easy](http://www.sensible.com/rsme.html) (see the [Rocket Surgery Made Easy: Accessibility Testing Demo Video](file:///C:\Users\GrandmaJulie\Documents\EDIT%20526%20Access%20Policy\Rocket%20Surgery%20Made%20Easy%20by%20Steve%20Krug:%20Usability%20Demo)).
2. Evaluation to check accessibility is an ongoing process, involves input from employees and customers, and should be expected to be a new constant in the whole development cycle.
3. Perfection is unattainable, but taking the initiative to lead the industry in designing a WCAG 2.0 Level AAA-accessible website and software product is its own reward.

Thank You for working with us,

The Mugsy Brothers