LibGuides Audit and Accessibility Recommendations

Document prepared by the PSEC Instruction Committee, LibGuides Subteam:
Aliqae Geraci, Jeremy Cusker, Zöe Wilkinson Saldaña, Lynn Thitchener, Mel Jensen
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Introduction

In consultation with AUL Danianne Mizzy, the LibGuides Subteam of the PSEC Instruction Committee seeks to comply with Cornell University web accessibility compliance requirements and deadlines regarding CUL LibGuides. In this document, we propose a process and timeline for a Guides audit and accessibility compliance activities, to be considered by the Library Directors Leadership Team and carried out at CUL and local levels.

The LibGuides Subteam is prepared to create audit and accessibility guidance and templates for units and staff working with LibGuides. Given the current distributed nature of LibGuides management, the Subteam believes that accessibility compliance can be achieved most efficiently if attentions are focused at the unit level on priority Guides that best meet patron needs and our own standards for usability, discoverability, and currency. The Subteam recommends that units unpublish any Guides that are no longer seen as relevant or useful, that require extensive link updating, or that are for courses not currently offered or supported by the unit, before engaging in extensive accessibility compliance work on unit Guides.

The Subteam recommends that each unit:
- Determine which Guides are current and relevant, and which are not
- Unpublish Guides that should not be prioritized for accessibility revisions
- Update remaining Guides in order to comply with accessibility standards

For an overview of proposed audit criteria, and required accessibility criteria, see Appendices A and B.

CUL is currently engaging in extensive accessibility compliance work to meet the December 2019 deadline for WCAG 2.0 Level AA standard relating to library content. The LibGuides Subteam has confirmed with CUL staff working on web and A/V compliance that Springshare and LibGuides content is not within the scope of their operations or consideration.

CUL LibGuides Ownership and Oversight

Given the depth and breadth of academic departments and disciplines served across the University, Cornell University Library units and individual staff own and manage hundreds of Guides. CUL LibGuides 219 account holders manage 2,729 Guides, with two-thirds accessible by staff or patrons: 880 Guides are published and publicly discoverable via the CUL website, and 891 Guides are private and can only be viewed with a direct link. For a description of Guide types and overview of CUL use, see Appendix D.

Historically, the LibGuides Subteam has had general responsibility for providing administrative and training support to the various units. However, protocols for creating and managing Guides vary across units. Some (ex: Catherwood) centrally coordinates all Guides that are managed under a team account and with broad staff participation, while other units (ex: Mann, Olin) distribute management roles to individual staff that create Guides from individual accounts as needed to address subject, department, or course needs.

Recommended Timeline and Workflow

The lack of centralized management of LibGuides poses some challenges for enacting major changes. It may be that messaging in regard to guide auditing will have the most impact if it comes from the unit head or director.

The LibGuides Subteam has secured a slot at the February R&O Forum, and can provide an overview of accessibility compliance to narrow the task. We also recommend that each unit have at least one person with administrative privileges who can act as the designated contact for the Subteam for the audit/accessibility process in that unit. For a current list of LibGuides administrators, see Appendix F.

The LibGuides Subteam can provide documentation and trainings as requested, with a possible schedule included in the below timeline.

Actual work timelines will vary widely by unit. It may be helpful to pool support staff or student staff resources as needed. The LibGuides Subteam is available to assist or recommend more detailed workflows if desired.

January
- LibGuides Audit and Accessibility plan as determined by LDLT
- LibGuides Subteam distributes LibGuides Audit spreadsheet of all public-facing CUL Guides to LDLT
- LibGuides Audit and Accessibility plan communicated within units

February
- LibGuides Audit and Accessibility plan communicated to CU-LIB
- LibGuides Subteam presents plan and resources at R&O Forum

February – June
- Periodic reminders and technical support emailed to Guide owners by Subteam
- Audit activities completed within units
- LibGuides Subteam provides trainings and consultations

June
- All public-facing Guides that do not meet standards are Unpublished
- LibGuides Subteam distributes LibGuides Accessibility spreadsheet of remaining CUL Guides to LDLT

July – August
- Accessibility compliance activities completed within units
- LibGuides Subteam hosts sprint/retreat sessions for in-depth support

September – October
- LibGuides Subteam presents review of plan and deadlines at R&O Forum

November
- LDLT and LibGuides Subteam reviews progress in Fall
- All remaining non-compliant publicly-facing Guides are unpublished by units or Subteam

December
- University accessibility compliance deadline

Appendices

Appendix A: Audit Criteria

The LibGuides Subteam has generated a spreadsheet of all currently published or private library Guides, identifying Guide author and last update date, as well as a checklist of core criteria:
1. Currency: Guide has been recently updated and information and links are accurate
2. Relevance: Guide reflects course, discipline, department, or library need
3. Title compliance: Course Guide title should include course number, course title, semester, and year for patron discoverability and ease of update.
4. Keep: Unit/staff must choose Y/N to keep for accessibility update, or reassign Guides/assets to another account (in the case of job changes or departures)

Past discussion of LibGuides at CUL has included page view statistics as an evaluative criterion of Guides relevance. The LibGuides Subteam strongly recommends that this criteria not be part of the audit process and in general Guides assessment. Course Guides are least suited to this framework; undergraduate courses with library instruction may have less than 20 students enrolled, and Guides reused and updated across multiple semesters will inevitably show greater use. Subject and topic Guides might describe sources and articulate workflows for narrow, but important, communities of student and faculty researchers, or be intended for CUL staff use only. The Subteam defers to unit libraries for assessment of individual Guides in relation to audience and content.

Appendix B: Accessibility Criteria

The University has mandated that content will meets WCAG 2 Level AA. The Subteam has reviewed University guidance, documentation already created by university libraries in their own LibGuides compliance activities, and Springshare technical documentation to identify required changes and assemble recommended resources to guide local progress. We can provide a standard template for creating new Guides.

Some required standards for Guides include:
a. Font: Arial, minimum 11pt
b. No background color
c. WYSIWG Paragraph used for formatting
d. Headings: H1 for page title, H2 for box title, H3 or lower for box text
e. Content: "chunked" as paragraphs, short sentences, bullets, and headings; avoid tables for layout or data unless necessary
f. Image properties include caption in Alternative Text
g. Hyperlinks:
    i. Link text describes link
    ii. No full URLs displayed
    iii. Opens in same window if leading to University content
    iv. Opens in new window for external content

h. Video/audio
   i. Direct hyperlink to video or audio files
   ii. If embedded in Guide, include title to iframes
   iii. Captions required; transcripts recommended

Appendix C: Third Party Resources for Accessibility Compliance
1. *Syracuse University Library "[Web Accessibility in LibGuides]("*
2. *[Chrome Color Contrast Analyzer plugin]*
3. *[WAVE: Web Accessibility Evaluation Tool]*
4. *[OATMEAL] accessibility testing tools*

Appendix D: Guide Types
1. *Subject Guides*

Subject Guides generally correspond to a department or disciplinary area in Cornell, and are intended to provide a broad overview to sources and research strategies for researchers at many levels.
   a. Examples: [American Indian Studies]; [Enology & Viticulture]; [Alternative Dispute Resolution]

2. *Course Guides*

Course Guides are intended to support instruction for a single class, student group, or a single presentation. Some CUL instructors report using LibGuides in place of, or to host, PowerPoint slides and/or handouts, as it enables them to 'seamlessly' teach, and access and demonstrate resources in a desired order. Course Guides may also host CLIQ assessments, and often are assembled from boxes on subject Guides.
   a. Examples: [ARTH 1162]; [ILRLR 2010];

3. *Topic or General Purpose Guides*

Topic or General Purpose Guides might describe a particular or narrow subset of the library collection, how and where to access it and how to use it. These Guides are often of long standing, or are used in conjunction with library website(s), and/or speak to repeated and similar reference questions justifying the creation of a more focused guide for patrons. Other Guides of this type are intended to be temporary or created on behalf of a short-term project.

   a. Examples: [Technical Standards & Building Codes]; [Women at Work]
   b. Examples: [Finding Special Format Items at Catherwood]; [Cornell Tech Library Services & Research]
   c. Examples: [Portal at Cornell]; [Yarn bomb the gates]!

Appendix E: Special Considerations

1. Captioning for video or embedded tutorials is available from University services, but is fee-based
2. Topic or General Purpose Guides used as part of or as an extension of a library website must be given considerable priority in updating and accessibility compliance. This can create duplicative workflows with regular website maintenance. Many academic libraries also use LibGuides for this purpose or even exclusively rely on Springshare to create web content. Part of the appeal of using LibGuides this way is that they can be quickly created and easily changed, and are designed for list management of library resource titles and descriptions.
3. Guides created by library committees and are intended solely for internal use are not priorities for this process. Most committees prefer to use Confluence pages--but insofar as it occurs, committees should be advised to ensure that their Guides are always made Private--that is, accessible only to individuals with the URL and that said URL is not widely shared. As with public-facing Guides, committee and internal Guides should be periodically reviewed and retired as necessary, and re-evaluated for long-term storage of documentation. Ensuring compliance may be challenging; committees do not have separate LibGuides accounts, so it is difficult to identify the full scope without item level Guides review.

Appendix F: Current Guide Administrators

Andrews, Camille
Bevia, Manolo
Blackaby, Dan
Bolton, Ken
Butterfield, Sally
Cappadona, Nick
Chandler, Adam
Colt, Jenn
Cusker, Jeremy
Geraci, Aliqae
Hamm, Noah
Hook, Peter
Jensen, Mel
Kotaska, Rob
Kuo Wallace, Melissa
LaVoice, Kelly
Library, Nestlé
Miller, Linda
Muratori, Fred
Ottaviano, Tom

Pacion, Kelee
Scholtz, Nina
Taichman, Marsha
Thitchener, Lynn

Appendix G: Guides Maintenance Best Practices

1. Review content and links annually.
2. Regularly retire (unpublish or delete) old course Guides and outdated subject Guides.
3. Include clear and specific course guide titles, including course number, semester, and year.