# California special district website compliance







Sloane Dell'Orto Streamline

# What we'll cover

- 1. SB 929: new additions
  - 2. Public Records Act
    - 3. The Brown Act
- 4 5. State Controller Reports
- Healthcare District Websites
  - "Open Data"
  - Section 508 Compliance

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SB 929		SB 272		AB 285	53 (optional):
Our district has created and maintains a website  Passed in 2018, all independent special districts must have a website that includes contact information (and all other requirements) by Jan. 2020		Our Enterprise System Catalog is posted on our website  All local agencies must publish a catalog listing all software that meets specific requirements—free tool at getstream-line.com/sb272		We post public records to our website	
				This bill allows you to refer PRA request to your site, if the content is displayed there, potentially saving time, money, and trees	
The Brown Act			State Contro	ller Rep	orts
AB 392:	AB 22	257:	Financial Transaction	Report:	Compensation Report:
Agendas are posted to our website at least 72 hours in advance of regular meetings, 24 hours in advance of special meetings  This 2011 update to the Act, originally created in 1953, added the online posting requirement  Healthcare District Websites	A link to the most recent agenda is on our home page, and agendas are searchable, machine-readable and platform independent  Required by Jan. 2019—text-based PDFs meet this requirement, Microsoft Word docs do not  Open Data		A link to the Controller's "By the Numbers" website is posted on our website Report must be submitted within seven months after the close of the fiscal year—you can add the report to your site annually, but posting a link is easier  Section		A link to the Controller's PublicPay website is posted in a conspicuous location on our website  Report must be submitted by April 30 of each year—you can also add the report to your site annually, but posting a link is easier  on 508 ADA
AB 2019:  If we're a healthcare district, we maintain a website that includes all items above, plus additional requirements  Including budget, board members, Municipal Service Review, grant policy and recipients, and audits		Anything posted on our website that we call "open data" meets the requirements for open data  Defined as "retrievable, downloadable, indexable, and electronically searchable; platform independent and machine readable" among other things		CA gov code 7405:  State governmental entities shall comply with the accessibility requirements of Section 508 of the federal Rehabilitation Act of 1973  Requirements were updated in 2018—if you aren't sure, you can test your site for the state of the	

# Don't be freaked out right now.

Promise, we can make this easy!



Streamline:
5 years, 500+
special district
websites,
500 local
government
agencies using
our free
compliance tools.

Digital
Deployment:
Our parent
company. 15 years,
300+ websites.



# Public Records Act

SB 929 requires websites for all districts.
SB 272 requires Enterprise System Catalogs
AB 2853 allows PRA content posted to sites!

### Public Records Act

**What it is:** a law passed by the California State Legislature and signed by the governor in 1968 requiring inspection or disclosure of governmental records to the public upon request, unless exempted by law. California Government Code §§ 6250 through 6270.5.

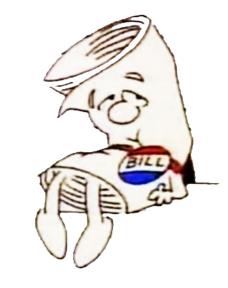
Online requirements (so far) come through three recent additions:

- SB 929
- SB 272
- AB 2853 (optional)



### Public Records Act: SB 929

What it is: A law signed by the governor in September 2018 that requires all special districts in CA to have a website by Jan. 2020, including five posting requirements (two formatting requirements are assumed).



What to do about it: Make sure your district has a website by Jan. 2020 and posts all required content (and is Section 508 compliant). Or, adopt a hardship resolution in a public meeting annually.

This bill would, beginning on January 1, 2020, require every independent special district to maintain an Internet Web site that clearly lists contact information for the special district, except as provided. Because this bill would require local agencies to provide a new service, the bill would impose a state-mandated local program.

The California Constitution requires local agencies, for the purpose of ensuring public access to the meetings of public bodies and the writings of public officials and agencies, to comply with a statutory enactment that amends or enacts laws relating to public records or open meetings and contains findings demonstrating that the enactment furthers the constitutional requirements relating to this purpose.

This bill would make legislative findings to that effect.

The California Constitution requires the state to reimburse local agencies and school districts for certain costs mandated by the state. Statutory provisions establish procedures for making that reimbursement.

This bill would provide that with regard to certain mandates no reimbursement is required by this act for a specified reason.

### Public Records Act: SB 272

What it is: Enterprise System Catalog requiring local agencies to create a catalog of "enterprise systems" that fit certain criteria, make it publicly available upon request, and post It in a prominent location on the website if they have one.

What to do about it: review the law and create a spreadsheet of all systems your agency uses that aren't exempt, or use Streamline's free Enterprise System Catalog tool (<a href="www.getstreamline.com/sb272">www.getstreamline.com/sb272</a>). Compliance was due by July 1, 2016.

Make sure to post a link on your website in a prominent location!



Agencies / Fallbrook Regional Health District

### Fallbrook Regional Health District

Edit agency profile

138 S. Brandon Road, Fallbrook, CA 92028 — 760-731-9187 — Edit

#### Step 1: System inventory

Create an inventory of all computer systems your agency uses, and qualify each of them for inclusion in your enterprise system catalog.

We'll walk you through each step to ensure you're including the proper systems.

+ Add system

Financial, QuickBooks

Microsoft Office Professional

Scanning software. Adobe Acrobat.

Some systems are not required to be included in your catalog, but you can still keep them here so you'll remember when you update your catalog next year. Anything exempt will appear below for your reference.



#### About

SB 272 adds a new requirement to the California Public Records Act. It requires every local agency, except local educational agencies, to create a catalog of enterprise systems. Each agency must make the catalog publicly available upon request in the

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#### THE DISTRICT

 $\Box$ 

**AFFILIATIONS** 

OUR DIRECTORS

BOARD MEETINGS

STAFF

DISTRICT TRANSPARENCY

ANNUAL REPORTS

FINANCIAL REPORTS

POLICIES

STRUCTURE

CALENDAR

#### **District Transparency**

Information	Where to find it
Mission Statement	Mission - Vision - Values
Staff Members	Staff
Services/Functions and Service Area	Structure
Service Area Map	Service Area Map
Principle Act or Special Act	Health Care/ Hospital Districts Principle Enabling Act
SB 272 Enterprise System Catalog	SB 272 Enterprise System Catalog
Board Overview	<u>Our Directors</u>
Board Members	<u>Our Directors</u>
Board Member Ethics Certificates	Board Member Ethics Certificates
Board Meetings	Board of Directors
Election Procedures and Filing Deadlines	<u>Director Information - Powers, Meetings,</u> <u>Officers</u>
Meeting Minutes Archive	Board of Directors
Current Agency Budget	Current District Budget
Financial Audit	Audits
Past 3 Years of Audits	Audits
Board Member and Staff Compensation	State Controller's Compensation Report

#### PUBLIC RECORDS REQUEST

To review or obtain public records and documents please complete our Public Records Request Form

### STATE/LOCAL AGENCY REPORTING

San Diego Local
Agency Formation
Commission (LAFCO) report
and response to report.
READ MORE »

### ENTERPRISE SYSTEM CATALOG

As required by SB 272
VIEW THE CATALOG »

ADDRESS: Fallbrook Regional Health District

138 S. Brandon Road Fallbrook, CA 92028

PHONE: 760-731-9187

### Enterprise System Catalog:

AUGUST 28, 2017

VENDOR AND PRODUCT: Microsoft, Office Professional

SYSTEM PURPOSE: Email. Calendars & Documents

CATEGORIES/TYPES OF DATA: Communication, Scheduling, Office Data, Agendas, Minutes, Contact Data, Project Data

DEPT./PRIMARY CUSTODIAN: Not applicable

FREQUENCY OF COLLECTION: As needed

FREQUENCY OF UPDATE: As needed

VENDOR AND PRODUCT: Adobe, Acrobat

SYSTEM PURPOSE: Create and archive documents

CATEGORIES/TYPES OF DATA: Documents, Forms, Policies & Procedures

DEPT\_/PRIMARY CUSTODIAN: Not applicable

FREQUENCY OF COLLECTION: As needed

FREQUENCY OF UPDATE: As needed

#### FRESNO IRRIGATION DISTRICT

#### Catalog of Enterprise Systems

#### Pursuant to CA Government Code 6270.5

Vendor	Product	System Purpose	Description of Categories or Types of Data	Custodian	Frequency Collected	Frequency Updated
Laserfiche, Inc.	Laserfiche	Storage Of Records & Documents	Scanned documents of District records	Accounting Dept. Engineering Dept. Administration Safety Manager The Shop	Daily Daily Daily Daily Daily	As needed As needed As needed As needed As needed
Tyler Technologies, Inc.	Incode	Accounting software	Financial Accounting Data for the District Financial Accounting Data for the District	Accounting Dept. Engineering Dept. Safety Manager	Daily As needed As needed	Quarterly As needed As needed
Microsoft	Microsoft Office Suite	Office Automation	(for creating documents, data analysis, email) word processing & spreadsheets	Accounting Dept. Engineering Dept. Administration Safety Manager Water Department The Shop Maintenance & Construction	Daily Daily Daily Daily Daily Daily Daily Daily	As needed As needed As needed As needed As needed As needed As needed
None	Custom Assessment	Issue and Track Assessments	Assessment charges, payments and water delivery information	Accounting Dept. Water Department	Daily Daily	As needed As needed

### Public Records Act: AB 2853

What it is: In addition to maintaining public records for public inspection during the office hours of the public agency, a public agency may comply with subdivision (a) by posting any public record on its Internet Web site and, in response to a request for a public record posted on the Internet Web site, directing a member of the public to the location on the Internet Web site where the public record is posted.

What to do about it: post often-requested public records to your site, and point PRA requestors there, potentially saving lots of money. (Note that if they cannot access the site for any reason, you still have to provide printed copies.)



How to make requests

Records

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#### WHAT WE DO

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FINANCIAL REPORTS

POLICIES

#### **Financial Reports**

#### **Acme Municipal Utility District 2015-2016 Budget**

Our budget is finalized in the first quarter of each calendar year for the upcoming fiscal year. READ MORE  $\ast$ 

#### 2015 Compensation Report

The required financial information can be found on the Controller's Public Pay website at http://publicpay.ca.gov/Reports/SpecialDistricts/SpecialDistricts.aspx

READ MORE »

#### 2015 Financial Transaction Report

READ MORE »

#### 2014-2015 Financial Audit

Audits are performed by Acme Auditing Company and are available by September of each year for the previous fiscal year.

READ MORE »

# HOW TO MAKE A PUBLIC RECORDS ACT REQUEST

Our most requested public financial documents are posted here on our website. If you cannot find the record you're looking for here, fill out this form to request it.

READ MORE »

# PUBLIC RECORDS REQUEST POLICY OF ACME MUNICIPAL UTILITY DISTRICT

To establish District policy and guidelines concerning accessibility of District records.

READ MORE »



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Your name

#### THIS ITEM APPEARS ON

FINANCIAL REPORTS

#### How to make a Public Records Act request

Our most requested public financial documents are posted here on our website. If you cannot find the record you're looking for here, fill out this form to request it.

Your phone number	
Your email address	
Record requested	Pro tip: Make it clear that most records are available on your site, and give them a way to request
Reason for request	others electronically

# The Brown Act

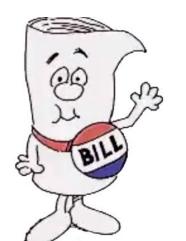
AB 392: original agenda posting guidelines.

AB 2257: new formatting and home page link

requirements for agendas.

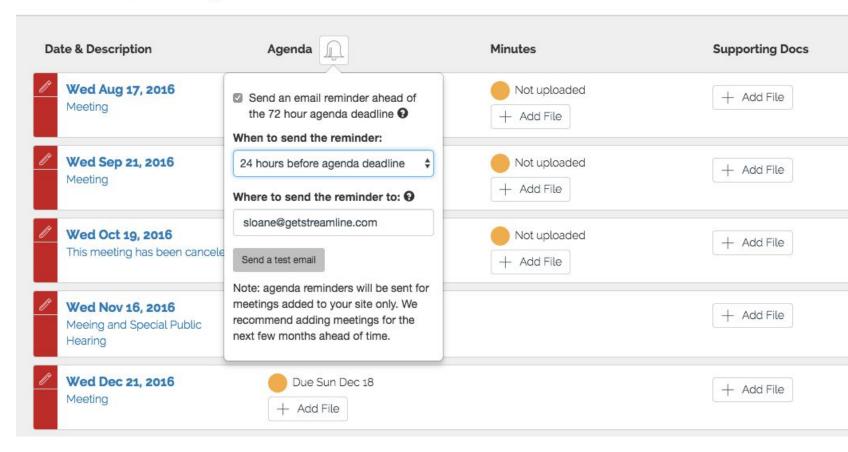
# The Brown Act: agenda posting

What it is: law governing meetings. At least 72 hours before a regular meeting ... post an agenda containing a brief general description of each item of business to be transacted or discussed at the meeting... in a location that is freely accessible to members of the public and on the local agency's Internet Web site, if the local agency has one.



What to do about it: Set a reminder to post your agendas at least 72 hours before each meeting, including on your website (or use Streamline Web's agenda posting reminder tool so you never forget!)

#### ∨ Board of Directors Meetings





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#### THIS ITEM APPEARS ON

**MEETINGS** 

DISTRICT GOVERNANCE

#### **Board of Directors**

The Acme MUD board of directors meets on the third Thursday of each month at 7:00pm in the board room at the district office. The board may also schedule special meetings at other times when needed, and will post notice according to the Brown Act.

Meeting agendas are posted to this site at least 72 hours in advance of each meeting, and minutes are posted after approved.

2019

2018 2017 2016

JAN

#### **Board of Directors Meeting**

- Agenda
- Minutes

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**FEB** 28

#### **Board of Directors Meeting**

- Agenda
- Minutes

READ MORE »

#### **MEETING AGENDA AND MINUTES ARCHIVE**

For all meetings prior to 2016.

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#### **CONTACT THE ACME MUNICIPAL UTILITY** DISTRICT

We look forward to hearing from you.

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#### THIS ITEM APPEARS ON

**MEETINGS** 

DISTRICT GOVERNANCE

#### **Board of Directo**

The Acme MUD board of directors m 7:00pm in the board room at the dist meetings at other times when neede

Meeting agendas are posted to this and minutes are posted after approved.

**Pro tip:** Instead of having separate sections for meetings, agendas, and minutes, add your agendas and minutes to each meeting, so that visitors can find what they're looking for based upon the meeting date.

2019

2018

2017

2016

#### JAN 24 2019

#### **Board of Directors Meeting**

- Agenda
- Minutes

READ MORE »

FEB 28 2019

#### **Board of Directors Meeting**

- Agenda
- Minutes

READ MORE »



# CONTACT THE ACME MUNICIPAL UTILITY DISTRICT

We look forward to hearing from you.

READ MORE »

# The Brown Act: AB 2257 posting requirements

**What it is:** AB 2257 - a brand new law dictating that agencies post the most recent agenda directly on the home page of their website, in an electronically searchable / retrievable platform-independent format.

What to do about it: Be prepared by Jan 2019 to post the most recent agenda to the home page in the required format (or use Streamline Web's automatic home page meeting feature so you don't have to worry about it).



#### **Job Openings**

We're hiring! All jobs are open to any candidate regardless of race, color, religion, gender, nationality, sexual orientation or sleep schedule.

- Office Manager position
- Customer Success Manager

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#### **Public Records**

Our district takes the Public Records Act seriously. Making public records act requests should be as easy as possible for citizens to submit, and for our staff to comply with (ultimately saving your...

• Make a Public Records Act request

READ MORE »



#### **Upcoming Events**

When we do things, we post about them on our website so that you can decide to come do things too.

- Feb 15 Fundraiser
- Jul 5 Sloane's Birthday

READ MORE »

#### **Board Meetings**

L' View Current Agenda

APR **25** 2019

**Board of Directors Meeting** 

Agenda

MAY **23** 

Board of Directors Meeting

JUN **27** 

Board of Directors Meeting

## The Brown Act: AB 2257 formatting tips

#### Keep the agenda separate from the packet! Do this:

- Create your agenda in Word (or Docs), export or save to PDF
- Upload that PDF file as your official agenda
- Then print and add to other docs if needed, scan to create the packet
- Upload the packet separately

\*Only the agenda needs to meet the requirements of AB 2257

\*\*Any PDF you add to your site should be text based, and fully accessible

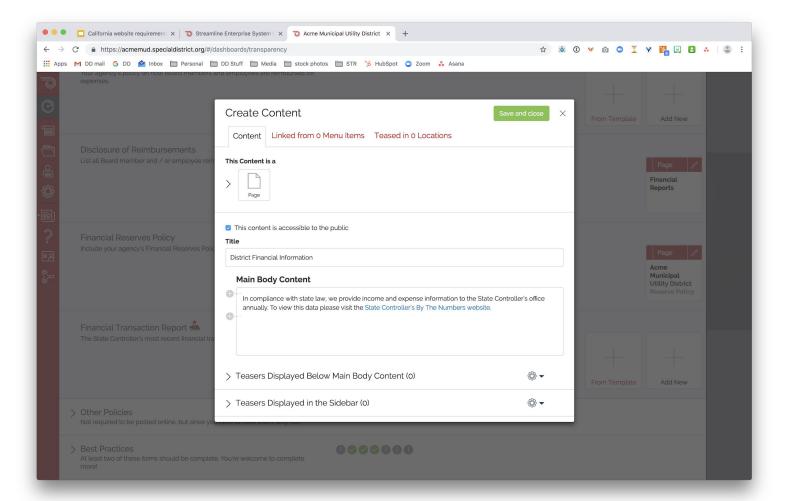
# State Controller Reports

Financial Transactions and Compensation

# Financial Transaction Report

What it is: CA Govt Code Section 53891 and 53893, requiring local government agencies to submit a specific financial transaction report to the State Controller's office "within seven months after the close of each fiscal year"...shall either post it in a conspicuous location on its Internet Web site, or cause copies of the report to be prepared and the clerk of the legislative body shall furnish a copy to any person requesting it.

What to do about it: Visit the Controller's website for forms, and be sure that your agency is submitting the report each year. Make sure to post it on your website, if you have one...or post a link to the Controller's ByTheNumbers website so you don't have to update it each year!

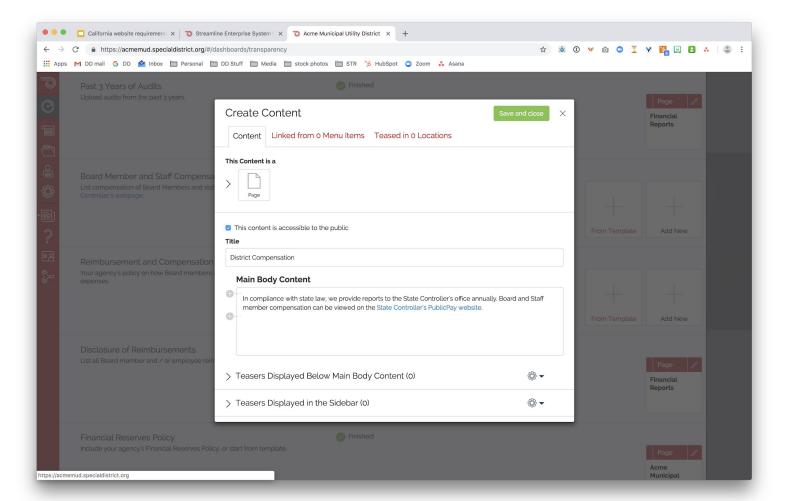


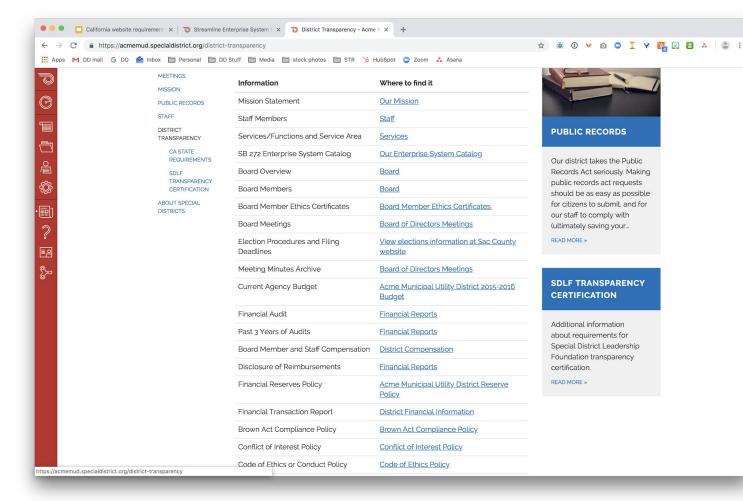
# Compensation Report

What it is: A report that must be submitted to Controller's office by April 30 each year, including information on the annual compensation of its elected officials, officers, and employees. If the agency maintains a website, the report must be posted to a conspicuous location. Alternately a link to the Controller's PublicPay website can be used instead.

What to do about it: Visit the Controller's website for instructions, and complete your reports annually. If you have a website, post the report on your site as well, or post a link to http://publicpay.ca.gov/instead.







# Health care districts

AB 2019 requires all health care districts to maintain a website with required information posted

# AB 2019: Health care district website posting

Establish and maintain an Internet Web site that lists **contact information for the district.** The Internet Web site shall also list all of the following:

- (1) The adopted **budget**.
- (2) A list of current **board members**.
- (3) Information regarding **public meetings** required pursuant to Section 32106 or the Ralph M. Brown Act (Chapter 9 (commencing with Section 54950) of Part 1 of Division 2 of Title 5 of the Government Code).
- (4) A **municipal service review** or special study conducted by a local agency formation commission pursuant to the Cortese-Knox-Hertzberg Local Government Reorganization Act of 2000 (Division 3 (commencing with Section 56000) of Title 5 of the Government Code), if any. The board may comply with this paragraph by posting a link on its Internet Web site to another government Internet Web site that contains the specified information.

...

### AB 2019: Health care district website posting

. . . .

- (5) **Recipients of grant funding** or assistance provided by the district, if any.
- (6) **Audits of the district's accounts and records** pursuant to Section 26909 of the Government Code or Section 32133 of this code. The board may comply with this paragraph by posting a link on its Internet Web site to another government Internet Web site that contains the specified information.
- (7) **Annual financial reports to the Controller,** submitted pursuant to Section 53890 of the Government Code. The board may comply with this paragraph by posting a link on its Internet Web site to another government Internet Web site that contains the specified information.\*
- (8) The district's **policy for providing assistance or grant funding** described in subdivision (c).
- (9) Any other information the board deems relevant.

\*Note: this is no different than the requirement of all districts

# Formatting requirements

AB 169 and Section 508

# Open Data

**What it is:** AB 169 is a California law defining what the term "open data" means, for content posted to an agency website. If you call it open data and you post it to your website, it'd better meet the guidelines, which are mostly about the searchability and structure of the data.

What to do about it: if your content doesn't fit the requirements to be called open data, then just don't call it "open data":)



#### AB 169: Open Data

"This bill, if a local agency, except a school district," maintains an Internet Resource, including, but not limited to an Internet Web site, Internet Web page, or Internet Web portal, which the local agency describes or titles as "open data," and the local agency voluntarily posts a public record on that Internet Resource, would require the local agency to post the public record in an open format that meets specified requirements, including, among others, that the format is able to be retrieved, downloaded, indexed, and searched by a commonly used Internet search application."

<sup>\*</sup> School districts are almost always exempted from state mandates

## Section 508 (ADA, WCAG 2.1 AA)

What it is: a Federal law requiring that various technology be accessible to people with disabilities. Web section concerns itself with making sure websites work effectively with assistive tech (screen readers, magnifiers, Braille readers, etc.)

What to do about it: You can use online testing software to check for Section 508 compliance. Reach out to your website vendor if your site isn't compliant - or just use Streamline Web.



## Section 508 (Federal / CA)

- Jan. 18, 2018, Section 508 officially adopted WCAG 2.0 AA guidelines,
   which are a bit more strict
- Only sites built after Jan. 18 2018 have to comply with the more strict guidelines (major redesigns count too) ... all other sites must comply with Section 508 only (grandfathered!)
- Use online testing tools like <a href="https://achecker.ca/">https://achecker.ca/</a> to check for compliance there are options to check for just Section 508 compliance (older sites) or WCAG 2.0 compliance (newer sites)

#### What does "website accessibility" mean?

The major categories of disability type, in relation to website accessibility, are:

- Visual: blindness, low vision, color-blindness
- Hearing: deafness and hard-of-hearing
- Motor: Inability to use mouse, limited fine motor control
- Cognitive: learning disabilities, distractibility, inability to remember or focus on large amounts of information

People with disabilities often rely on assistive technology (AT) - screen readers, browser zoom, text to speech, etc...

#### Common pitfalls

- No closed captions on video/audio files
- Not having accessible PDFs / documents
- Not having ALT tags for images
- Lack of labels on form fields
- Color contrast
- Not having a mobile-responsive site
- Non-semantic HTML

#### But why?

- An estimated 15 20% of the population has a disability, many of which affect a person's ability to navigate the web
- Your website should be accessible by everyone if possible, and the basics aren't that difficult
- Accessible websites get better search results (bonus!) because they are typically formatted in a more clear, easy to parse way
- Getting sued is very, very expensive

#### Very, very expensive

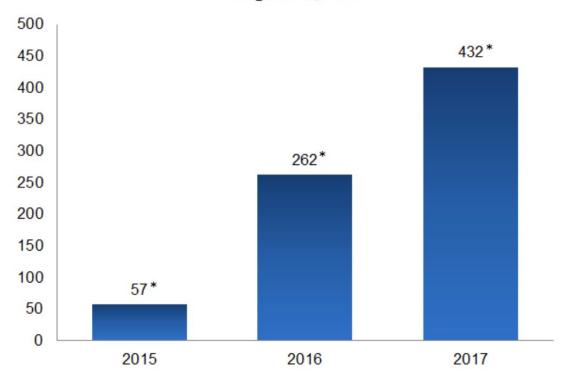
Within forty-five (45) days after the effective date of this Agreement... any agent acting on behalf of either the University or the Board shall pay the Complainant a total sum of **\$23,543.00**. Such payment(s) shall be made by check(s) payable to the order of the Complainant and delivered to the Complainant via overnight, private courier.

UNCATEGORIZED -

# Target to pay \$6 million to settle site accessibility suit

Target has settled a class-action lawsuit with the National Federation of the ...

#### Federal Website Accessibility Lawsuits: January 2015 to August 15, 2017



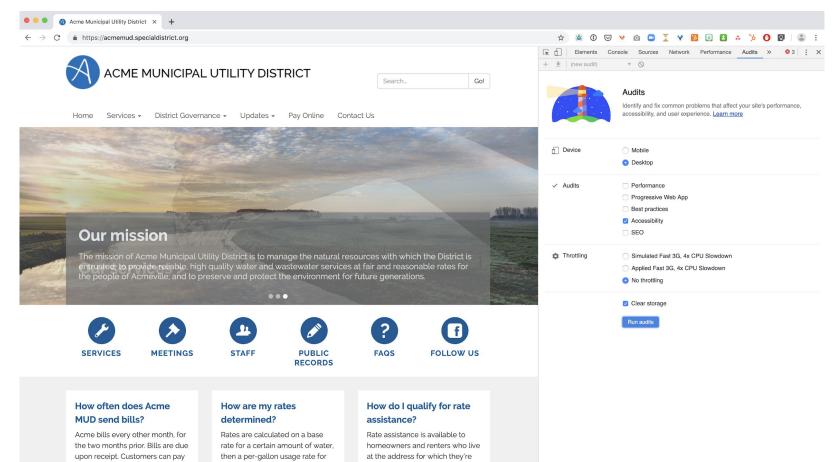
<sup>\*</sup>There are at least this many lawsuits.

#### Testing resources

- Chrome Lighthouse free, right in the browser, good for single page tests (or testing the whole site one page at a time)
- achecker.ca free good for single page tests for 508 or WCAG 2.0
   AA standards
- Various paid services (Monsido, LevelAccess, ADA Site Compliance)

Note: automated testing tools only go so far, but show intention and effort to comply

## Using Chrome Lighthouse



## Using Chrome Lighthouse

determined?

Rates are calculated on a base

then a per-gallon usage rate for

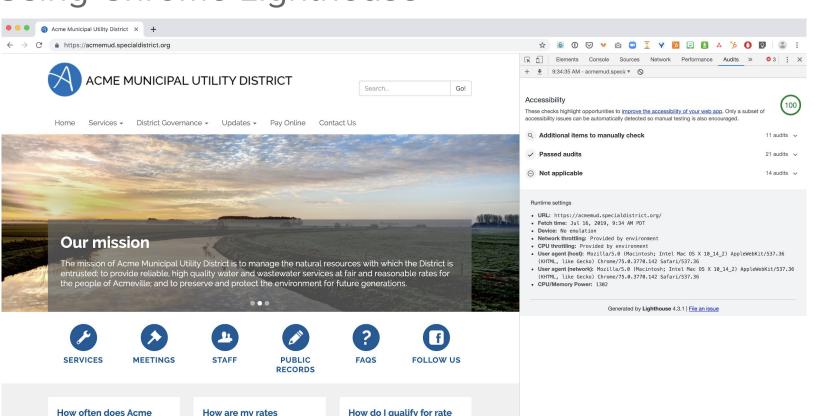
rate for a certain amount of water,

MUD send bills?

Acme bills every other month, for

the two months prior. Bills are due

upon receipt. Customers can pay



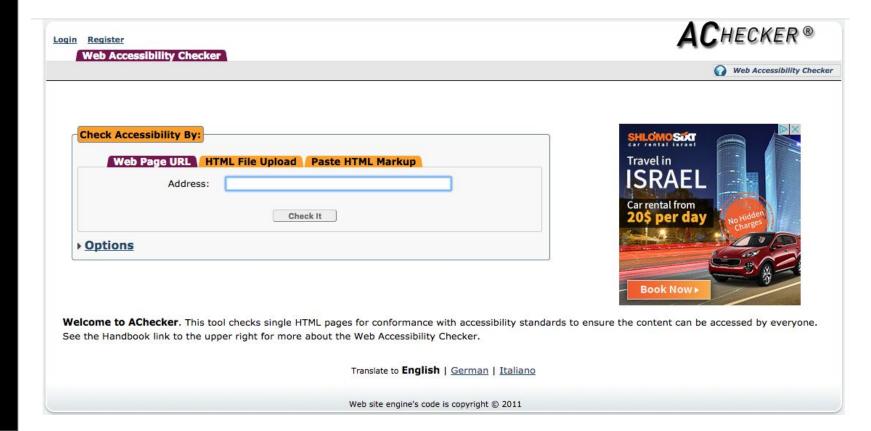
assistance?

Rate assistance is available to

homeowners and renters who live

at the address for which they're

#### Using <u>achecker.ca</u>



### Enter URL, click Options to choose test type

Web Page URL HTML	File Upload Paste HTML	Markup			
Address: h	ttps://mcrfd.specialdistrict.org/				
Check It					
tions					
Enable HTML Validator	<ul> <li>Enable CSS Validator</li> </ul>	☐ Show Source			
Guidelines to Check Again	nst				
○ BITV 1.0 (Level 2)	O Section 508	O Stanca Act			
○ WCAG 1.0 (Level A)	○ WCAG 1.0 (Level AA)	○ WCAG 1.0 (Level AAA)			
○ WCAG 2.0 (Level A)	<ul><li>WCAG 2.0 (Level AA)</li></ul>	○ WCAG 2.0 (Level AAA)			
Report Format					
View by Guideline	OView by Line Number				

#### **WCAG 2.0 AA:**

New/Current Standards

#### Section 508:

Standards before Jan 18, 2018

#### Evaluate results

ssibility Review (Guide	elines: WCAG 2.0 (Level	AA))	rt Format: PDF ‡ Report	to Export: All	\$ Get
Known Problems(0)	Likely Problems (0)	Potential Problems (166)	HTML Validation	CSS Validation	
naratulations	I No known prob	lome			
ratulations	! No known prob	iems.			

 For compliance you need to pay attention to anything that shows up under Known Problems

#### What if there are errors?



 If your report shows "Known problems," export it and share with your website vendor to get a quote to have them fixed.

# So how do you keep on top of this stuff?

#### Streamline has your back.



- Free, no obligation customized demo sites
- Agenda notifiers and meeting dashboard
- Transparency guidelines built-in
- Section 508 compliant and mobile friendly
- Complete control over your content, navigation menus, and more
- All inclusive monthly fee: no contracts, unlimited hosting and support
- Free SB 272 compliance tool
- Product demo webinar this Thursday! getstreamline.com/webinars

Whatever crazy laws come next, we'll be here to help.

# We can help.

engage.getstreamline.com/929-webinar

(916) 900-6619 sloane@getstreamline.com