

REVIEW REPORT

WEB accessibility FOR web AUTHOring tools producers and communities Cluster (WE4AUTHORS Cluster)

Project acronym: WE4AUTHORS Cluster
Grant agreement number: LC-01438281
Funding scheme: Pilot Projects and Preparatory Actions in the field of "Communications Networks, Content and Technology"
Project starting date: 1 March 2020
Project ending date: 31 August 2021
Project duration: 18 months
Beneficiaries: FUNKA NU AB (FUNKA) – coordinator,
SITEVISION AB – partner,
KITCONCEPT GMBH - partner
Project Coordinator: Ms Susanna Laurin
Project web site: <https://accessibilitycluster.com/>

Period covered by the report: 1 September 2020 – 28 February 2021
Place of review meeting: remote
Date of review meeting: 22 March 2021

Expert: - Yeliz YESILADA

EC Project officer: - Paweł DOBOSZ

1. OVERALL ASSESSMENT

a. Executive summary

Please give your overall assessment of the project, commenting on the following:

- *main scientific/technological achievements of the project*
- *quality of the results*
- *attainment of the objectives and milestones for the period*
- *adherence to the workplan, any deviations (whether justified) and remedies (whether acceptable)*
- *take-up of the recommendations from the previous review (if applicable)*
- *contribution to the state of the art*
- *use of resources*
- *impact*

WEb Accessibility FOR Web AUTHOring toolS producers and communities Cluster (WE4AUTHORS) is an 18-months pilot project. This project is building on the findings of the WE4AUTHORS pilot project and aims to create a cluster with key Content Management Systems (CMS)s intending to create several common accessibility features that work the same way in different authoring tools. In this second period, the project is progressing well. The following are the strengths of the second period of this project:

- The dissemination activities, in particular, the participation in events and articles published in newsletters/blogs are excellent. The outreach of the project is impressive.
- The project's progress is visible. In particular, this project is aiming to bring together several CMS vendors in the market who are competitors with different backgrounds and approaches, and it is appreciated that these competitors are actively collaborating in the project and contributing to the outcomes of this project.
- Prototypes are created and tested with 100 authors with contributions from the CMS vendors involved in the project.
- A matrix is created that shows the accessibility features agreed, and the support of the five CMS vendors (Plone, Drupal, SiteVision, Joomla and Umbraco). It is good to see that these vendors are working together and collaborating under the same accessibility umbrella.

The attainment of the **objectives** for this first period can be summarised as follows:

- “*Development of 10 prototypes*”: The 10 features agreed in the first period, is developed as prototypes in this second period with a tool called Axure. The deliverables submitted briefly explains these prototypes but the proposed designs and also the alternatives are not demonstrated in the submitted deliverables.
- “*Development of user scenarios*”: The user scenarios are briefly mentioned but none of the submitted deliverables (D2.2, 2.3 and 2.4) clearly explains them. During the review meeting, clear demonstrations are given, however, none of these deliverables refers to the online prototypes developed and tested, and the project website does not also present them.
- “*Piloting the user scenarios*”: Pilot tests with nine pilot testers are conducted and reported in D2.3.
- “*User testing performed and results analysed*” and “*Validation of the compliance of the results*”: A user test is conducted with 100 authors. However, the overall methodology is not clear. The plan in the DoW clearly shows the involvement of the three user groups: 1) authors, 2) end-users, and 3) disabled authors for back-end accessibility. However, the latter two groups have not involved in the user testing

performed. It was clarified in the review meeting that their involvement will be ensured in the last period after the prototypes are implemented.

This project has five **Work Packages** (WPs). WP1 is about the user requirements and prioritization of accessibility features. The major work in WP1 was completed in the first period, however, D1.3 has not been submitted yet. It was planned to be submitted in M12 but now the plan is to submit it in M14. WP2 focuses on prototyping, iterative development, and testing accessibility features. In this second period, the focus was on this WP. The prototypes of the 10 features agreed are created, they are tested by 100 users and the results are reported. WP3 is about the implementation which is planned to be completed in the last period. WP4 is about dissemination and WP5 is about management. In the first period, the dissemination and communication plan is completed, and in this period one-year activities are reported. In the first period, the management plan is completed and this WP is planned to be completed in the final period.

The project has four **milestones** (MS) planned and according to DoW, two of those are planned to be completed by the end of the second period. Their status can be summarised as follows:

- MS1: This milestone is planned to be achieved with the submission of D1.3. However, this deliverable is still pending updates. Therefore, this MS has not been achieved.
- MS2: This milestone is partially achieved with the submission of D2.3. This deliverable has been submitted therefore this MS has been achieved. However, there are some concerns about the scope of the prototypes and their user testing.

The **resources** are well used and justified, and no deviations reported. The potential **impact** of the work is still very high. In summary, the work is progressing well, especially in terms of dissemination. However, some technical challenges and planned technical implementations need to be closely monitored in the final period of this project.

b. Recommendations concerning the period under review

Please give your recommendations on the acceptance or rejection of resources, work done and required corrective actions – e.g., resubmission of reports or deliverables, further justifications, etc.

Based on the review of all the deliverables submitted, the following needs to be revised and resubmitted:

- *D1.3 “Technical specifications for the prioritised list of agreed accessibility features”:* This has not been completed from the first period.
- *D2.3 “Report on user testing and validation”:* The DoW also shows a plan for a study with three user groups: 1) authors, 2) end-users, and 3) disabled authors for back-end accessibility. However, this deliverable does not demonstrate the involvement of these user groups. Furthermore, the methodology is not clear. In the review meeting, a demonstration of the test scenarios was given. Therefore, this deliverable can be extended to include the details of those prototypes and scenarios, which will make the methodology clearer.
- *D5.4 “Second progress report”:* This report indicates that 12 features are implemented but that should be corrected as 10 features.

c. Recommendations concerning future work

Please give your recommendations – e.g., overall modifications, corrective actions at WP level, retuning of the objectives to optimise the impact or to keep up with the state of the art, better use of resources, re-focusing, etc. Where appropriate, indicate the timescale for implementation.

These are the recommendations concerning future work:

- The project website, which, judging by the number of visits, is very popular, should provide the maximum possible information and current news about the course of the project. During the review meeting, not everything that was reported was visible on the website, e.g., the ERRIN article. The website should also clearly and comprehensively present the prototypes developed in the project (as soon as they are finalized). Information on the website is more durable than on other channels, especially social media, and for many people, it is the first/primary source of information about the project and its results.
- The form of the features that will be released and open-sourced is not clear, and that needs to be clarified as soon as possible. The consortium should agree as soon as possible what project resources/ results and in what form will be made public.
- After the finalization of WP3, the outputs of the implemented features should be tested by users with disabilities and, as far as possible, the backend should also be similarly tested, as foreseen in the DoW.
- The project has only six months left, therefore the technical implementations of the proposed 10 features, especially by the CMS vendors, need to be closely monitored.
- The features are targeted to be downloadable, open-source but to ensure that these can be used by a wide variety of authoring tools, the specifications are critical, and they need to be considered to address a wide range of authoring tools. In addition to the specifications and recordings considered for the dissemination of the project results, it is recommended to present the features/ prototypes developed in the project also in an interactive form (similar to the one in which the testing was carried out). This form seems to be especially good for effectively showing people less familiar with web accessibility (by allowing them to play with functionalities) what the project is about and what practical application it may have.
- In the second period, participation in WordPress Accessibility Day was a great dissemination activity towards the WordPress community. Since WordPress is among the most widely used CMS¹, ensuring the involvement of the WordPress community in the last period would be great, especially in terms of outreach.
- Finally, as it was stated in the first period, the project objectives are much in line with the EU funded WAI-GUIDE project. Therefore, it would be great to see closer collaboration with the WAI-GUIDE project.

d. Assessment

- Excellent progress (the project has fully achieved its objectives and technical goals for the period and has even exceeded expectations).
- Good progress (the project has achieved most of its objectives and technical goals for the period with relatively minor deviations).
- Acceptable progress (the project has achieved some of its objectives; however, corrective action will be required).
- Unsatisfactory progress (the project has failed to achieve key objectives and/or is not at all on schedule).

¹ <https://www.funka.com/en/projekt/we4authors/we4authors-main-activities-and-results/market-analysis-and-benchmarking-process-of-existing-cms/>

2. OBJECTIVES and WORKPLAN

a. Progress towards project objectives

Assess to what extent the objectives of the project for the period have been achieved. In particular, please indicate if the project as a whole has been making satisfactory progress in relation to the Description of Work (Annex I to the grant agreement) and comment on the interaction between the work packages and the level of integration demonstrated.

The proposal has the following specific objectives and in this second period, the progress towards these objectives can be briefly explained as follows:

- “*To build on the best practices found in the on-going We4Authors project, elaborating specific accessibility features, To ensure consistent accuracy of accessibility by default features across the CMS market, To pursue leading-edge technologies to be used in default accessibility features throughout the market, To leverage the existing accessibility by default features of commercial, free, and open-source tools, To take accessibility by default to a new level in a vendor-neutral environment*”: In the first period, 10 accessibility features are agreed and in this second period the main goal was to test and validate them. Even though the prototypes are completed and a test is conducted with 100 authors, overall the methodology is not fully in line with the proposed methodology in the DoW. The DoW clearly states that different user groups will be used to test and validate, but the focus was on authors testing the prototypes. As was indicated in the recommendations, it is strongly recommended to have end-users validation after the prototypes are developed as well and as far as possible, the backend should also be similarly tested, as foreseen in the DoW.
- “*To bring key expertise within CMS producers and providers together to develop a common understanding of accessibility by default features, To engage the broader community throughout the development of the project deliverables, to help ensure consensus and uptake by European and international stakeholders*”: In the first period, the project had very good outreach in terms of reaching specific vendors. Joomla and Umbraco were subcontracted to the project. Therefore, the project is bringing together five vendors including Plone, Drupal, SiteVision, Joomla and Umbraco. From that perspective, the project is progressing well. With the impressive dissemination activities, the project has also demonstrated very good outreach in this second period.
- “*To demonstrate the benefits of a vendor-neutral repository of accessibility features creating a de facto-standard, To test the chosen accessibility features with web authors with and without disabilities to verify accuracy of output, back-end accessibility, usability/ease of use, and impact on compliance*”: Ten features are prototyped and also tested in this second period. However, unfortunately, the work conducted does not demonstrate the involvement of authors with disabilities and also the validation of back-end accessibility is only limited to the project coordinators.
- “*To stimulate the market with a wide range of networking activities, dissemination and communication actions to reach the key players and main decision-makers as a way to incentivise competition in the area and raise overall awareness in all stakeholders groups*”: Regarding these specific objectives, the project is progressing very well. Many dissemination activities are conducted in a wide range of events, and via these, the project is raising very good awareness in all stakeholder groups.

b. Progress in individual work packages

For each work package (WP), assess the progress in relation to the Description of Work (Annex I of the grant agreement), including the progress of individual tasks. Please also report and comment on any delays, reasons for them and any remedial action taken. In the case of deviations, estimate the scale of deviations (quantify in % if possible).

WORK PACKAGES

WP 1 - User requirements and prioritising of accessibility features

Task 1.1. User requirements

Task 1.2. Prioritisation of accessibility features

This WP was planned to be completed in the first period. At the end of the first review, D1.3 was planned to be updated and submitted by the end of M12, however, that has not been submitted yet and planned to be submitted by the end of M14. Therefore, this WP has not been completed yet.

WP 2 - Iterative prototyping and testing of accessibility features

Task 2.1. Prototypes and information package for developers

Task 2.2. Agile development

Task 2.3. User testing and validation

Information package for developers was completed in the first period. In this second period, the focus was on agile development and also user testing and validation. The features are mainly prototyped, and these prototypes cannot be used in an actual user testing scenario. However, the planned deliverables are submitted but the overall methodology used for testing and validation is not clear.

WP 3 - Implementation of the features in different technical environments

Task 3.1. Implementation of accessibility features

Task 3.2. Repository of accessibility features

This WP is planned to be completed in the last period of the project.

WP 4 – Demonstration and dissemination activities

Task 4.1. Dissemination and communication plan

Task 4.2. Community outreach

Task 4.3. Dissemination actions

Dissemination and communication plan, acquiring new cluster members and setting up the website was completed in the first period. In this second period, the dissemination activities continued and the project website was regularly updated. Therefore, the progress of this WP has been very good.

WP 5 – Project management and sustainability plan

Task 5.1. Project management plan

Task 5.2. Sustainability plan

Task 5.3. Operations and financial management

The project management plan was completed by the end of the first period. In this second period, the second progress report is completed. However, there are errors in the submitted report and needs to be corrected.

c. Deliverables and milestones

Assess deliverables and indicate whether the planned milestones have been achieved for the reporting period.

DELIVERABLES			
No.	Title	Status (Approved/ Approved with reservations/ Request for revision/ Rejected)	Remarks
D1.1	Report of user requirements	NA	
D1.2	Mapping of user requirements with accessibility features	NA	
D1.3	Technical specifications for the prioritised list of agreed accessibility features	Request for Revision	In the last periodic review, it was agreed that the revisions will be submitted by the end of M12. However, this has not been completed and now the consortium is planning to submit it by the end of M14. The justification is well received.
D2.1	Information package for developers	NA	
D2.2	Matrix of accessibility features, CMS and accessibility criteria	Accepted	This report mainly explains the proposed prototypes and also how they are perceived by the five CMS vendors involved in the project. According to DoW, the matrix was planned to show "how accessibility feature (x) can be implemented in different types of CMS (y) and which accessibility criteria of the HEN they cover (z)". Even though the matrix shows whether a feature is supported by a CMS but it does not show how it can be implemented. However, the overall report explains it so this can be accepted.
D2.3	Report on user testing and validation	Request for Revision	This report indicates that a study is conducted with 100 authors and further qualitative interviews were conducted with eight experts. The overall methodology is not clear. The prototypes are briefly explained and it is not clear how they are implemented. Even though In D2.2 indicated that they are implemented with Axure, it is not clear how they are used for testing, and how the prototypes look. Therefore, it is strongly recommended to update this deliverable with the relevant prototypes and user scenarios and how they were tested.
D2.4	Matrix of user testing comparing relevance for end-users/visitors (x) ease of use (y) and potential back-end accessibility barrier (z)	Accepted	The DoW plans a study with three user groups: 1) authors, 2) end-users, and 3) disabled authors for back-end accessibility. However, this deliverable does not demonstrate the involvement of these user groups. Only partners' personal experience is reflected in the created matrix.
D3.1	Report on the result of the test-implementation	NA	

	of accessibility features in different CMS		
D3.2	Report on high-level discussions with We4Authors Cluster members and other relevant market players	NA	
D3.3	Report on the repository of accessibility features: structure and contents.	NA	
D4.1	Dissemination and communication plan	NA	
D4.2	Report on the call for new cluster members	NA	
D4.3	Project website	NA	
D4.4	Report on first-year dissemination activities	Accepted	This report explains the dissemination activities. Overall, some dissemination activities such as a variety of event participations and blog posts are very impressive. Some activities need to be closely monitored in the last period of the project, for example, workshops, repository setup and usage, and published articles.
D4.5	Final report on dissemination	NA	
D5.1	Project management plan	NA	
D5.2	WE4Authors Cluster sustainability plan	NA	
D5.3	First progress report	NA	
D5.4	Second progress report	Request for Revision	It has some errors, for example In Section 1.2 it says that “12 accessibility features are implemented” but 10 features are implemented.
D5.5	Final report	NA	

MILESTONES

No.	Name	Status (Achieved / Partially Achieved - %/ Not Achieved)	Remarks
MS 1	Elaboration of technical specifications for the agreed accessibility features	Not Achieved	The cluster has agreed on the 10 accessibility features and working towards the technical specifications. D1.3 was planned in the DoW to be completed in Month 4 (M4) but it was agreed in the last review meeting to submit the technical specifications by the end of the first year. However, in this second review, it is reported that D1.3 which is the specifications will be submitted by the end of M14. Therefore, this MS will be achieved and approved when the technical specifications are submitted.
MS 2	User testing and validation of the accessibility features	Partially Achieved	This MS is planned to be completed by the completion of D2.3. Deliverable D2.3 has been submitted, however, some

			recommended improvements need to be addressed.
MS 3	Publication of final repository of accessibility features	NA	
MS 4	Successful organisation of the expert workshop in Brussels	NA	

d. Relevance of objectives

Indicate whether the objectives for the coming periods are (i) still relevant and (ii) still achievable within the time and resources available to the project. Assess also whether the approach and methodology continue to be relevant.

All objectives are still relevant and achievable within the time and resources available to the project. The only concern is about how a public repository is going to be created where the templates will be shared that can be used by any type of CMS. As D2.2 and D2.3 demonstrate there are major technical differences between the way each CMS approach a specific accessibility problem and also they have experiences from different markets. Apart from that the approach and methodology are still relevant. Especially it is very good to see that different CMS vendors are participating in a project to discuss the challenges of creating accessible content. It is also appreciated the project is progressing well despite the differences of the CMS vendors participating in the project.

3. RESOURCES

a. Assessment of the use of resources

Comment on the use of resources, i.e. personnel resources and other major cost items. In particular, indicate whether the resources have been utilised (i) to achieve the progress and (ii) in a manner consistent with the principle of economy, efficiency and effectiveness². Note that both aspects (i) and (ii) have to be covered in your answer. The assessment should cover the deployment of resources overall and by each participant. Are the resources used appropriate and necessary for the work performed and commensurate with the results achieved? Are the major cost items appropriate? In your assessment, consider the person months, equipment, subcontracting, consumables and travel.

The resources are used wisely and fairly by each partner in the project, and it is in line with the proposed plan.

b. Deviations

If applicable, please comment on major deviations with respect to the planned resources.

No deviations are reported and observed.

² "The principle of economy, efficiency and effectiveness refers to the standard of "good housekeeping" in spending public money effectively. Economy can be understood as minimising the costs of resources used for an activity (input), having regard to the appropriate quality and can be linked to efficiency, which is the relationship between the outputs and the resources used to produce them. Effectiveness is concerned with measuring the extent to which the objectives have been achieved and the relationship between the intended impact and the actual impact of an activity. Cost effectiveness means the relationship between project costs and outcomes, expressed as costs per unit of outcome achieved." Guide to Financial Issues, Version 02/04/2009, p.33.

4. MANAGEMENT, COLLABORATION AND BENEFICIARIES' ROLES

- a. Technical, administrative and financial management of the project

Assess the quality and effectiveness of the project management, including the management of individual work packages, the handling of any problems and the implementation of previous review recommendations. Comment also on the quality and completeness of information and documentation.

As it was in the first period, the project is managed well. It is not easy to collaborate and coordinate a project with different CMS vendors that compete in the market. The consortium shows a good level of communication and interaction. None of the risks discussed in the DoW became a problem. In particular, the Covid pandemic did not affect the overall progress of the project. Apart from D1.3 and MS1 achievement delay, and some quality concerns, all the other work packages are completed on time. The dissemination activities are quite impressive overall.

- b. Collaboration and communication

Comment on the quality and effectiveness of the collaboration and communication between the beneficiaries.

The communication between the partners is efficient and effective. All partners contributing to the progress of the project.

- c. Beneficiaries' roles

Give an assessment of the role and contribution of each individual beneficiary and indicate if there is any evidence of underperformance, lack of commitment or change of interest.

All of the beneficiaries have been active.

5. USE AND DISSEMINATION OF FOREGROUND

a. Impact

Is there evidence that the project has so far had, and is it likely to have, significant scientific, technical, commercial, social or environmental impact (where applicable)?

The main technical project results have not completed yet, therefore it cannot be commented on how the technical and scientific impact will be. However, the project has already demonstrated a very good social impact. The dissemination activities conducted so far raises awareness among the CMS community regarding the accessibility requirements and importance. These activities can have a high impact on influencing how authors and the users of these CMS vendors become aware of accessibility.

b. Use of results

Comment on whether the plan for the use of foreground, including any updates, is still appropriate. Comment also on the plan for the exploitation and use of foreground for the consortium as a whole, or for individual beneficiaries or groups of beneficiaries, and its progress to date.

The outcomes of this project will enhance the know-how of each of the beneficiaries, especially as some of them are not directly involved in accessibility work. Therefore, the exploitation plan is still appropriate.

c. Dissemination

Assess whether the dissemination of project results and information (via the project website, publications, conferences, etc.) has been adequate and appropriate.

In this second period, the project has been activities in social media, there have been several important and very relevant event participations and also blog/newsletter posts. From the reported analytics, the project website is very popular. However, the website has not been fully updated. During the review meeting, not everything that was reported was visible on the website, e.g. the ERRIN article. The website also does not show the prototypes tested and developed. At the time of the review, they were listed under Funka's main website. The website should also clearly and comprehensively present the prototypes developed in the project (as soon as they are finalized). Information on the website is more durable than on other channels, especially social media, and for many people, it is the first/primary source of information about the project and its results.

Overall, the dissemination activities have been very impressive in this first period.

d. Involvement of potential users and stakeholders

Indicate whether potential users and other stakeholders (outside the consortium) are suitably involved (if applicable).

The participation and interaction with different CMS vendors have been good. However, the involvement of disabled authors has been limited. None of the reported deliverables mentions the involvement of disabled web authors or end-users.

e. Links with other projects and programmes

Comment on the consortium's interaction with other related Framework Programme projects and other national/international R&D programmes and standardisation bodies (if relevant).

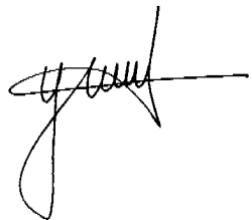
The consortium conducted a study with 100 authors from a wide range of countries. However, as was indicated in the first periodic review, better links could be established with W3C, especially with ATAG and also the WAI-GUIDE project.

6. OTHER ISSUES

If applicable, comment on whether other relevant issues (e.g. ethical issues, policy/regulatory issues, safety issues) have been handled appropriately.

There are no other concerns.

Expert: Yeliz Yesilada



Signature:

Date: 7 April 2021