



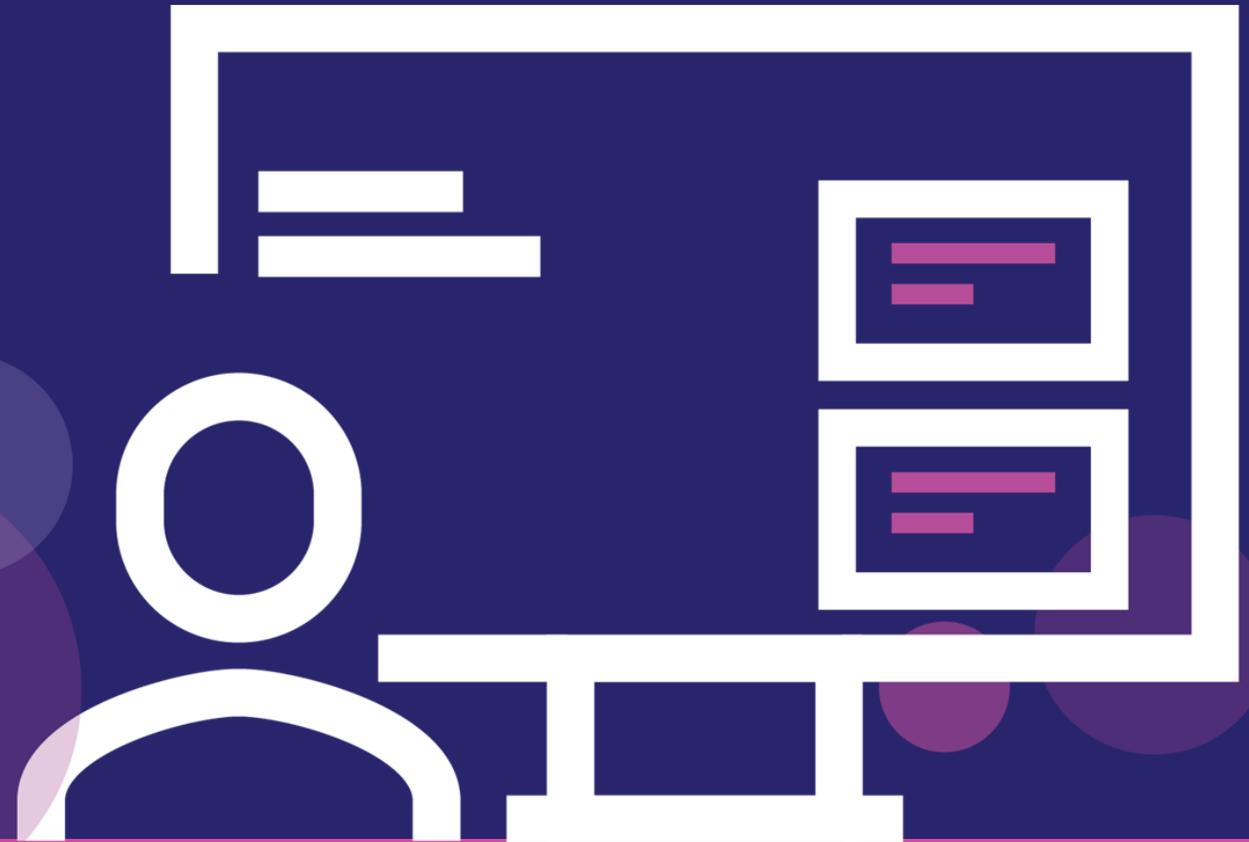
**PRESENTATION:**

<http://bit.ly/vendora11y202>

5

DESIGNING A

# Vendor Monitoring Program



## – OUR COMMITMENT –

Whether it's online, or over the phone, at the ATM or in person, Navy Federal is focused on ensuring our members all have equal access to our products and services.

## A LITTLE ABOUT ME



# Jaunita George

**JD, CPWA, ADS (she/her)**

Joined Navy Federal in 2020 and currently works as an ADA Digital Program Manager leading the Enterprise Technical Accessibility Team, as well as chairing the Accessibility A11ies Community of Practice. Represents NFCU on the Accessibility Guidelines and ARIA Working Groups at the W3C. She is also a member of the Internet Society's Accessibility Special Interest Group.

AND A LITTLE ABOUT ME



# Jason Page

(he/him)

Joined Navy Federal in March of 2022 and currently as the lead for the Technical Accessibility Monitoring Program for the Enterprise Technical Accessibility Team. At nine plus years with accessibility, he works to enable equal access for everyone by connecting like minds, working with people where they are, and setting solid goals. He also ensures that great minds and solid checks are in place for complete conformance.

# Our Team



**Raymond Schwartz**  
Accessibility Coach Lead



**Westly Estes**  
Vendor Monitoring Program  
Senior Accessibility Engineer



**Dr. Angela Young**  
Training and Awareness  
Program Lead



**Mai Vang**  
Vendor Monitoring Program  
Senior Developer of Accessibility



**Tim Harshbarger**  
Accessibility Coach



**Eduardo Meza Etienne**  
Automation Lead

**- THIS IS A RESOURCE -**

There's a lot of content in this presentation.  
Please go ahead and use any part to help you  
to create your program.



Note: The opinions expressed in the presentation are my own and not those of Navy Federal Credit Union.

**– NOT LEGAL ADVICE –**

**NOTE:** The content contained herein has been provided for educational purposes only and may not be accurate or reflect the current state of the law. Nothing in this presentation is intended to constitute or constitutes legal advice or is intended to create or creates an attorney-client relationship. Seek advice from your legal counsel to learn about the laws in your jurisdiction or that apply to your situation.

# Building a Case for a Vendor Program

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# Why a Vendor Program

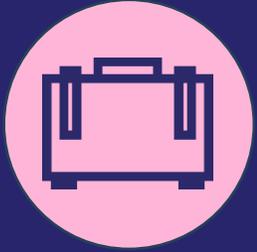
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## When you're using vendor products...

**many times, a customer can't tell where your product ends and when the vendor product begins.**

- You can't have a diverse workforce if you don't purchase accessible tools
- When accessibility is everyone's responsibility, it becomes no one's responsibility
- Vendor claims need to be validated. Accessibility is new for many companies
- Accessibility experts should be partners in the procurement process
- Relying on outside vendors to perform key accessibility functions is costly and unsustainable
- Accessibility risk factors are different than other risks weighed by the organization

# Leadership Buy-In 1 of 2



## The Business Case:

Accessibility opens your organization to new markets. People with disabilities represent a 490 billion dollar market.



## The Legal Case:

Accessibility is required by law in many countries around the world. Businesses that don't comply can face legal action, fines or regulatory action.



## The Ethical Case:

Access to Information and Communication Technology (ICT) is a fundamental human right.



## The Human Case:

Disability is part of the human experience. We all know and care about someone who has a disability. Our customers and colleagues have disabilities. One day, it's likely that you will have a disability if you don't have one already.



## The Financial Case:

Finding issues that reach production is very costly. So are lawsuits.

Sometimes it takes many conversations, in different ways and with different people to make the case. Be patient and whatever you do

**DON'T GIVE UP.**

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## Persuade Others

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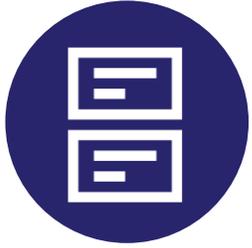
# Can't persuade leadership?

## Then start small.

- Convince one other person in your organization
- Have that person convince another person
- Over time, the people who begin to understand the importance of accessibility begins to multiply
- A company's culture is comprised of the contributions and beliefs of each employee. If you change someone's mind, then you're beginning to change a culture
- People want to do the right thing and make a meaningful difference
- It takes time, but it does work

# How to Build Your Program





# Steps for Building a Vendor Program

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1. Assembling your team
2. Forming relationships
3. Determine scope
4. Inventory your vendor applications
5. Accessible procurement policy
6. Write accessibility contract language
7. Develop a robust process
8. Include people with disabilities in that process
9. Outline the role of the accessibility team

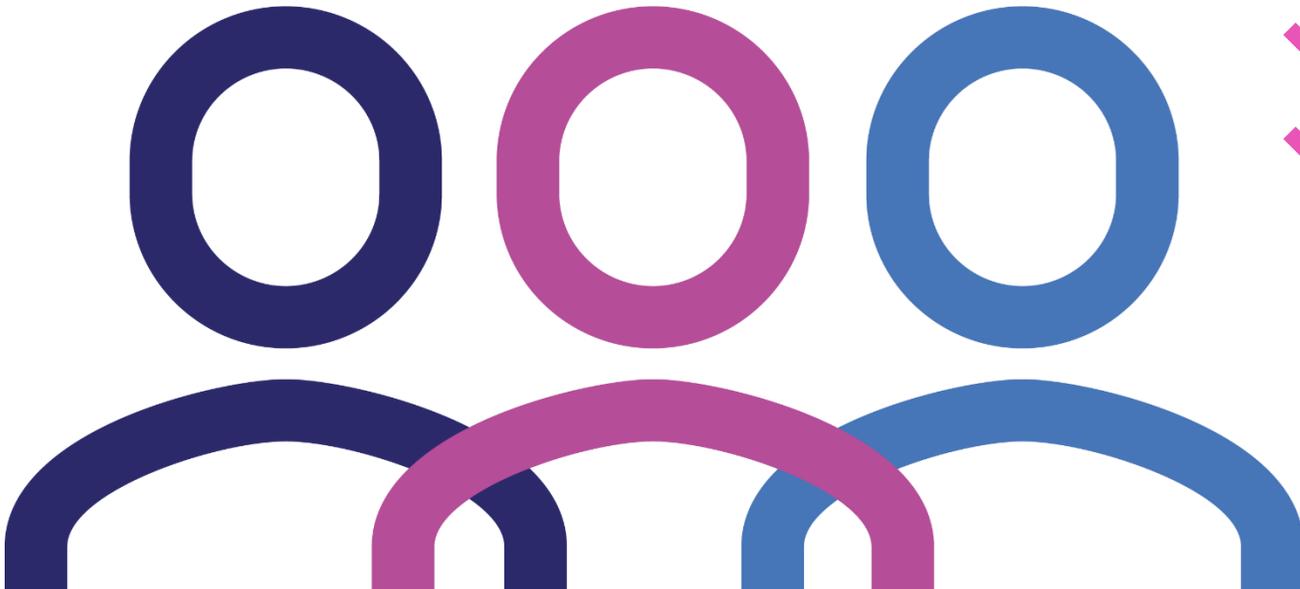




# Why You Need a Vendor Team

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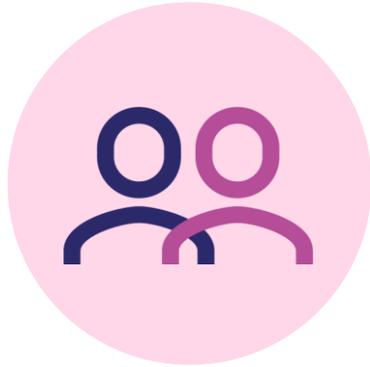
- ✓ Accessibility Subject Matter Expertise
- ✓ Relationships with Procurement, departments and vendors
- ✓ Assists with Procurement tasks related to accessibility (**accessibility template language**)
- ✓ Maintains key documentation
- ✓ Assesses accessibility level and risk





# Key Team Members

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**Relationship Manager**  
someone who works well with different teams and who is good at finding solutions.



**Contract Manager**  
someone with program management experience and experience with the more legal/risk-based aspects who can field questions from risk teams, legal and assist procurement with drafting provisions.



**Accessibility Engineers**  
these are the people performing the audits, creating audit reports and assisting with remediation.

**WHAT NOT TO DO: Look for one person who can do everything.**



## Relationships are Everything 1 of 2

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# It's going to be difficult to form relationships at first.

- Training and awareness efforts can go a long way in helping you explain the importance of accessibility to your procurement teams
- **Start small** – if you can't get integrated officially into procurement processes, focus on building individual relationships with people in procurement. Help them with their work and try to find ways to make their lives easier
- Try getting access to your company's contract management system first
- Build your own contract repository and get to know the vendors you're working with. This knowledge can help you build credibility with procurement teams



## Relationships are Everything 2 of 2

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**Build **strong working** relationships with other stakeholders as well. It's much easier to advocate for your team if you have the support of others.**

- Involve risk, cyber security and legal teams. Often, they have similar goals and looping them in can help you build better partnerships and advocate for each other



# Program Scope

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## Is the application a customer or public facing:

- Portal (such as ones for uploading documents, purchasing, etc.)
- Webpage (including mobile websites)
- Digital document (Word, Excel, PowerPoint, PDF, ePUB)
- eLearning (mobile and web – also includes the eLearning player)
- Communication tools like messenger applications or web conference platforms
- Survey
- Email
- Native mobile app
- Feature that will be used on webpages, mobile websites, or native apps
- Video (including video players) / Audio
- Design
- Or content that will be included in any of the above



## Inventory Your Applications 1 of 3

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**It's important to know all public-facing vendors that your organization works with and ensure the vendor applications and services you currently use are accessible.**

- Relationships are important and will help you connect the dots

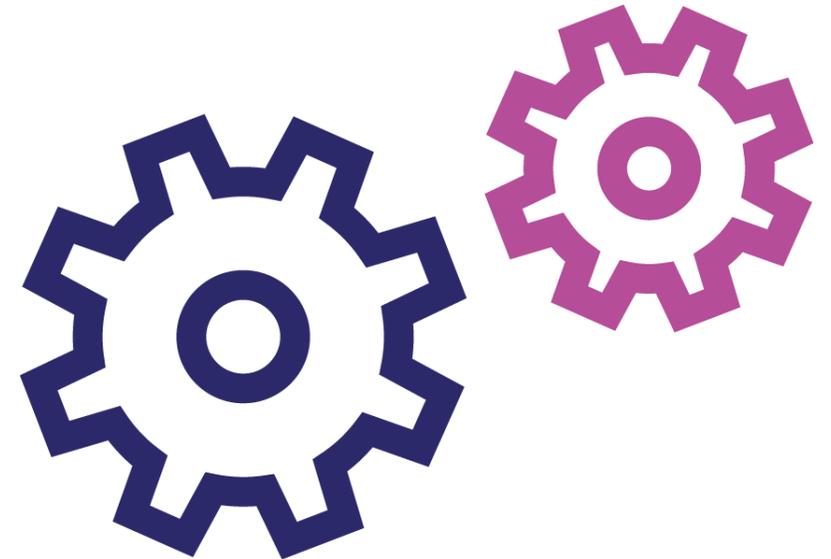


## Inventory Your Applications 2 of 3

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**Build a database of vendors. Include key information such as:**

- ✓ Last accessibility audit date and results
- ✓ Documentation of accessibility fixes
- ✓ Accessibility Conformance Report or ACR (if available)
- ✓ Internal Point of Contact (POC)
- ✓ Public information, such as links to their accessibility policy and links to public-facing examples of their functionality





## Inventory Your Applications 3 of 3

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**Note the kind of vendor it is. Some may provide functionality, while others might provide services that create functionality available to the public.**

- Be sure to obtain vendor contracts



## Ways to Find Vendor Products or Services 1 of 2

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**Work with teams already inventorying vendors for other reasons (such as governance). Try to find ways you can work together (such as contributing to a single database of vendors).**

- Contact different departments or business units to obtain lists of vendors they use and build your own database



## Ways to Find Vendor Products or Services 2 of 2

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**Provide ways** for different teams across the organization to report vendors and ask for accessibility reviews.

- Search the web for all public-facing company links
- Inspect the code of public-facing links for clues that they use vendor technology
- Shadow teams to learn more about how each product is developed and whether vendors were used
- Ask your procurement contacts



# Crafting a Policy

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## Key Elements:

1. Statement of organization commitment to accessibility
2. Level of conformance (**for example WCAG 2.2AA**)
3. Relevant law
4. Link to Supplier Code of Conduct
5. Scope
6. Responsible team or party
7. Remediation and Monitoring
8. Consequences for failure to adhere to the policy
9. **Exceptions process** – note that exceptions should be rarely used and always temporary





# Contract Provisions for Accessibility

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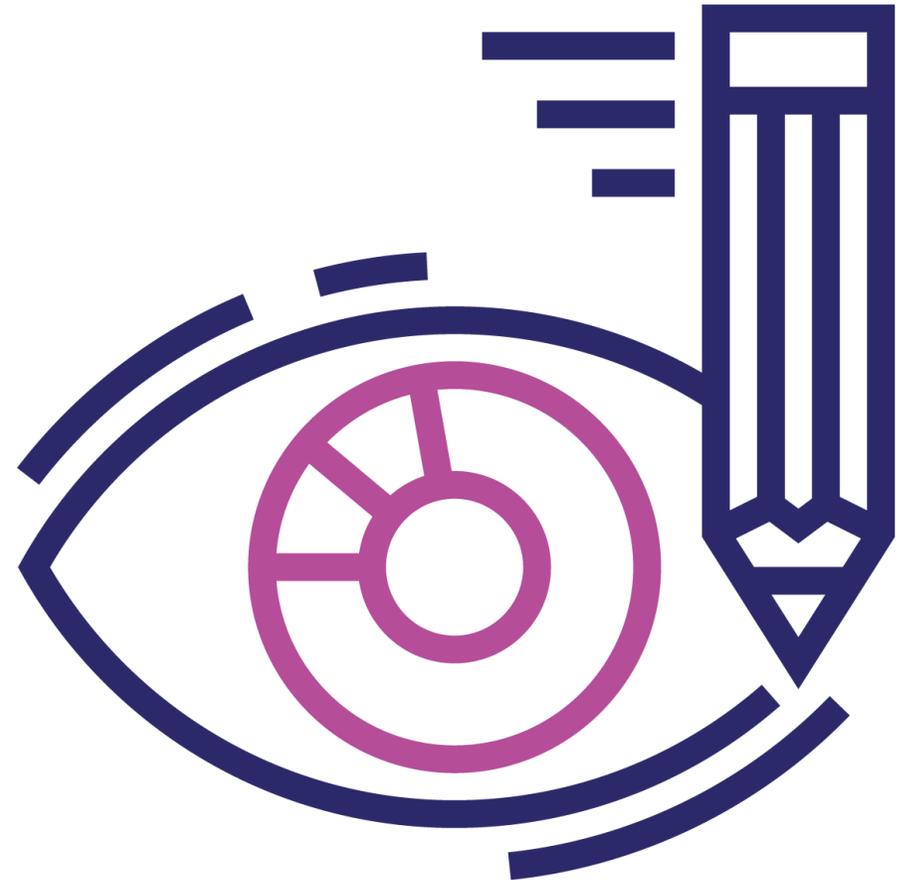
- Level of conformance required (**and account for changes**)
- When testing will be performed and by whom
  - ✓ Initial audit
  - ✓ After major releases (**which need to be defined**)
  - ✓ After a certain amount of time has passed
- Who will perform testing (**include people with disabilities**)
- How testing will be performed
- Permitting testing by your accessibility team
- Details about accessibility efforts by vendor
- Response/remediation to issues found
- Indemnification
- Breach



# Different Templates for Different Services

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- Contracts for staff augmentation
- Services to create digital content
- Design services
- Web and native mobile applications/platforms
- Documents
- Software
- Hosting and cloud services
- Component libraries
- Content authoring tools
- Developer tools and frameworks





# Role of Accessibility Team

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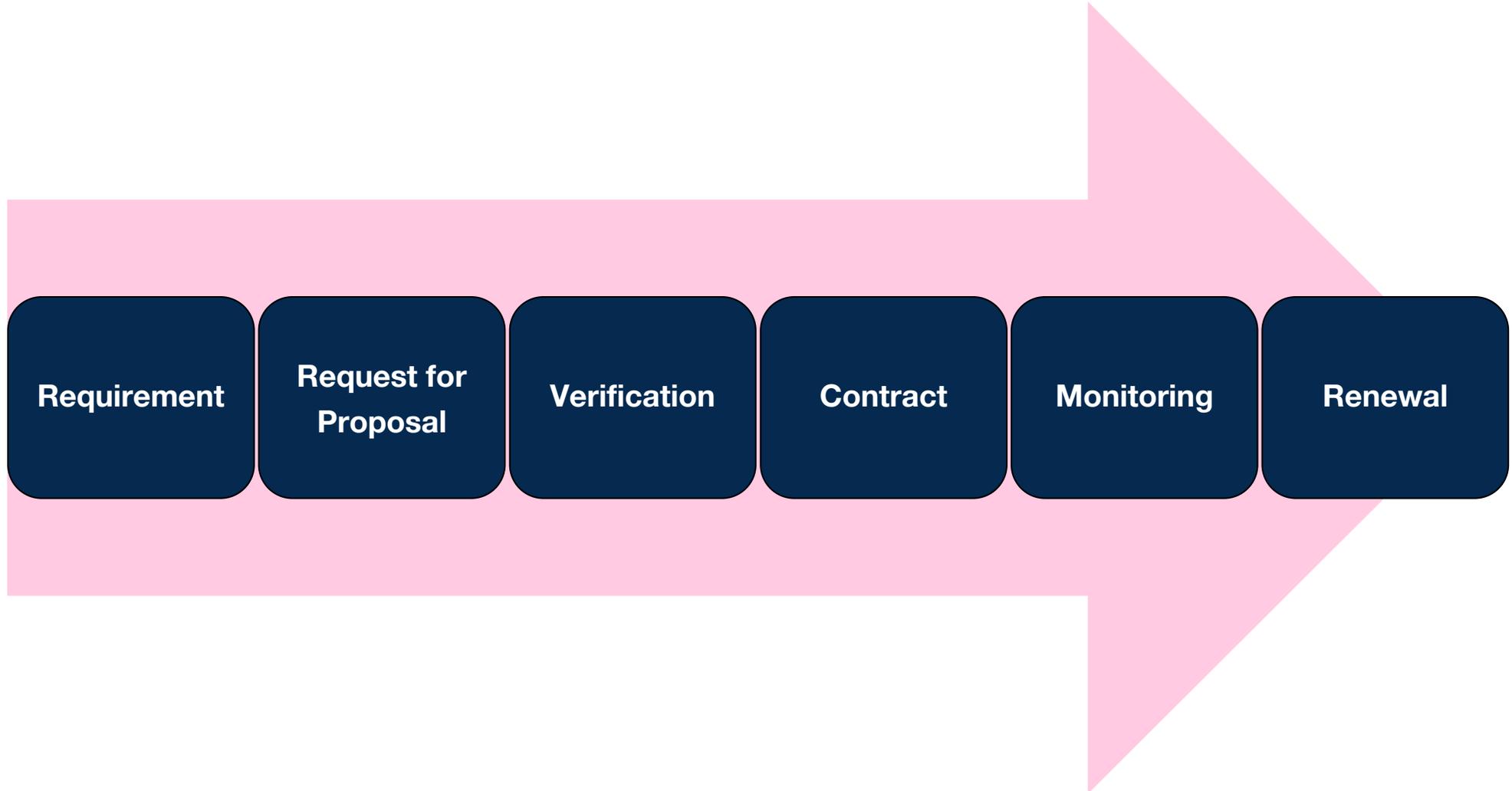
The **Accessibility Team** should be assisting with securing accessible vendors. They serve both the procurement team and the department making the purchase.

- Draft accessibility requirements
- Review VPATs/ACRs
- Perform pre-selection reviews
- Suggest accessible vendors
- Assist with contract language
- Coordinate user tests
- Perform full audits
- Provide remediation assistance and guidance
- Maintain conformance documentation and audit history
- Perform accessibility risk scoring
- Training
- Creating/maintaining toolkits for procurement and other stakeholders



# Overview of the Process

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## Start at the Source!

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**Make sure the team procuring the technology understands the importance of accessibility:**

- Build places in your process where the accessibility team is informed about new vendor requests
- Add your accessibility questionnaire to your RFP template
- Let vendors know your accessibility process and policy
- Create and maintain a Supplier Code of Conduct
- If you're able to do so, post your vendor accessibility policy publicly





# Voluntary Product Accessibility Templates (VPATs)

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**A VPAT is a blank template vendors can use to show how Information and Communication Technology (ICT) products comply with accessibility standards (like section 508).**

- **Latest VPATs can be downloaded at the Information Technology Industry Council (ITI)'s website:**  
<https://www.itic.org/policy/accessibility/vpat>
- **Learn how to complete a VPAT at the GSA's Section508 website here:**  
<https://www.section508.gov/sell/how-to-create-acr-with-vpat/>

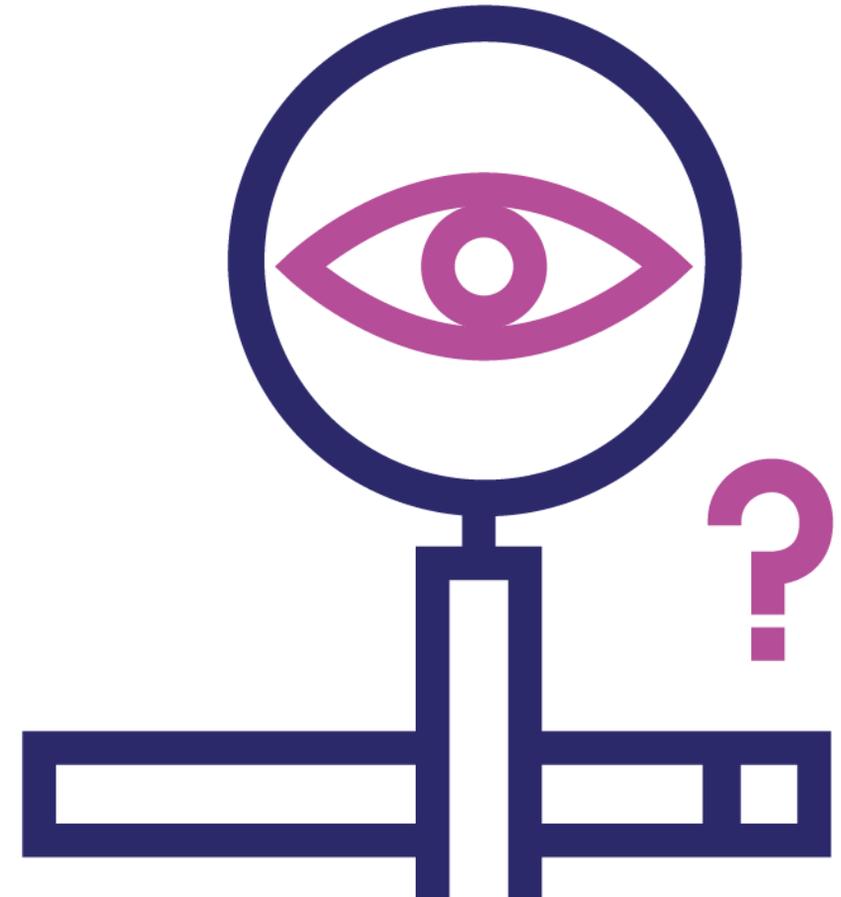


# Accessibility Conformance Reports (ACRs)

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Essentially, ACRs are completed **VPATs**:

- The VPAT is the blank template and the ACR is what one would call a completed template
- Note that an ACR doesn't have to be a completed VPAT, but it most often is
- Usually, vendors provide them as part of a procurement process to show their level of accessibility
- Make sure the ACR applies specifically to the functionality that you're using or intend to use





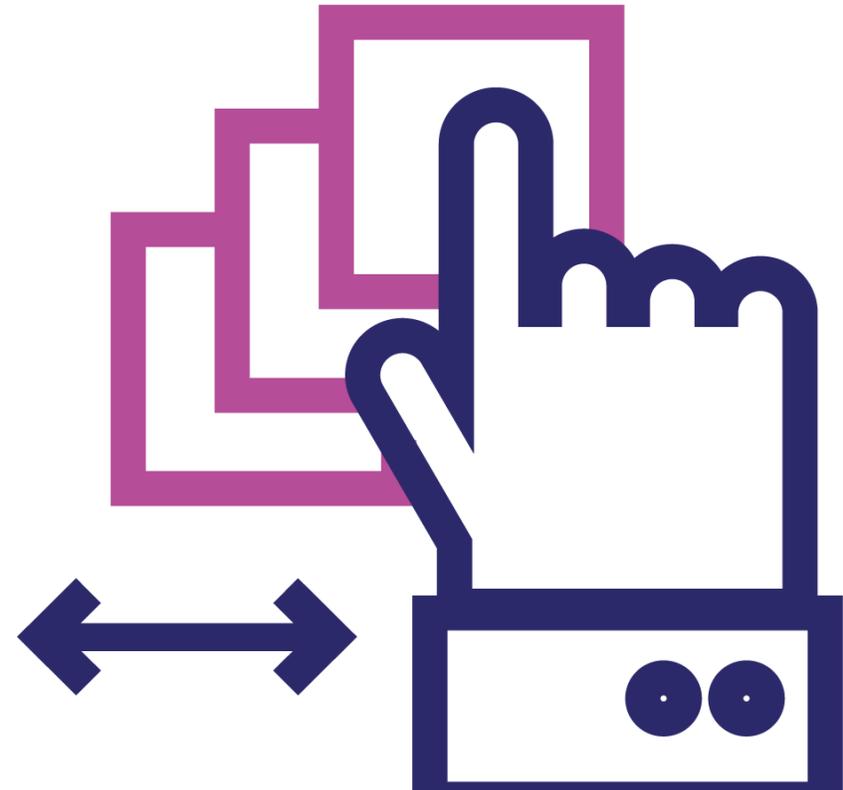
# Reviewing Vendor Claims 1 of 3

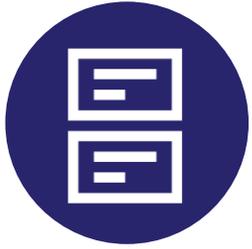
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**It's important to ask for and validate each ACR.**

**Things that make a them more reliable:**

- Based on assessment done by a qualified, reputable independent third party
- Tester name provided and they have a known certification in the industry (like a CPWA).
- Testing tools and process included
- Detailed information (such as unresolved issues) provided
- Date is recent





## Reviewing Vendor Claims 2 of 3

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Note that ACRs really ought to be based off a full audit of the product. **Since many internal teams don't have qualified accessibility testers, audits by an independent third party are more reliable.**

- If the ACR doesn't meet your standards, a full audit should be performed
- Since most of the internet is inaccessible, it's likely that most, if not all available vendors will have varying degrees of issues. Plan accordingly





## Reviewing Vendor Claims 3 of 3

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### A vendor should never be considered compliant unless:

- A full audit was performed by a qualified, reputable, independent third-party (or your own team if you have those resources)
- Findings were all fixed (or there were no findings) and validated by auditor in writing (could be an ACR but doesn't have to be)



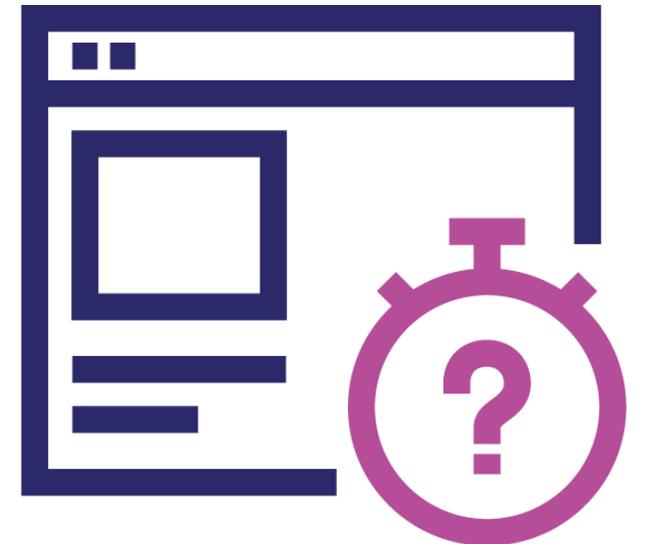


## Smoke Tests 1 of 2

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**Top vendors in an RFP or sole vendors (if sole-sourcing) should be assessed prior to selection and accessibility should be one of the selection criteria.**

- Smoke testing is light accessibility testing that looks at major workflows within a vendor's application or most critical content
- **It would include:**
  - ✓ Screen reader tests
  - ✓ Keyboard testing
  - ✓ Color contrast checks
  - ✓ An automated scan
  - ✓ Manual check of the code (if web-based)
  - ✓ Usability testing with users with disabilities



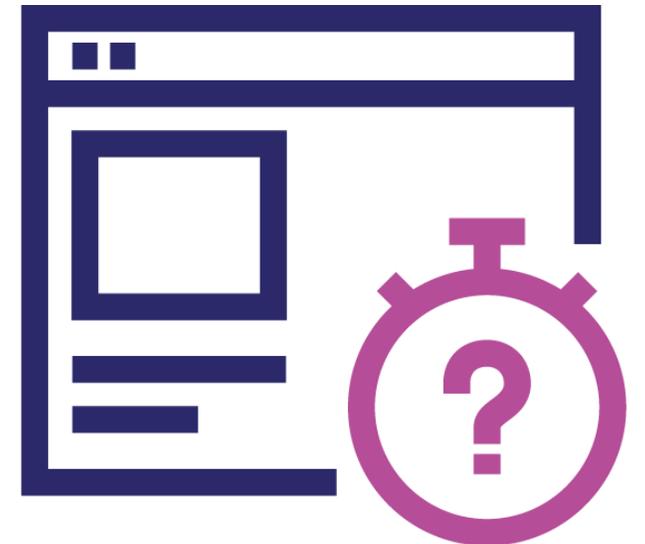


## Smoke Tests 2 of 2

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**Even if a vendor has an excellent response to an RFP, if they are providing technology or digital content, smoke testing should be performed as part of the validation/selection process.**

- Review should be timeboxed  
(for example, no more than a half an hour)
- Vendor should be notified about the review and informed of any results. They should know it's not a full audit but a cursory review
- Smoke test exemptions should be provided if the vendor provides a recent audit report from a reputable independent third party (or their ACR is based off a third-party audit) and verifies no major updates to the content or functionality have happened since that review



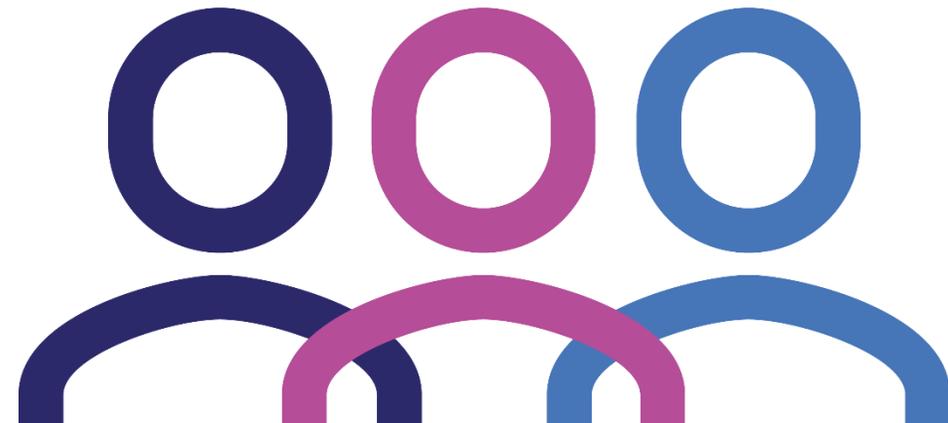


# Working with Vendors 1 of 2

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**Let your vendors know how important accessibility is to your organization and the human impact of that work.**

- Vendors generally don't want to sell products that exclude people, so when communicating with them, come from a place of understanding. They want to do the right thing and might just need to learn how to do that
- Accessibility is relatively new, and vendors may not have built up a lot of accessibility knowledge and a culture of accessibility within their organization
- Make remediation a partnership between you and the vendor. They want to deliver the best product to you



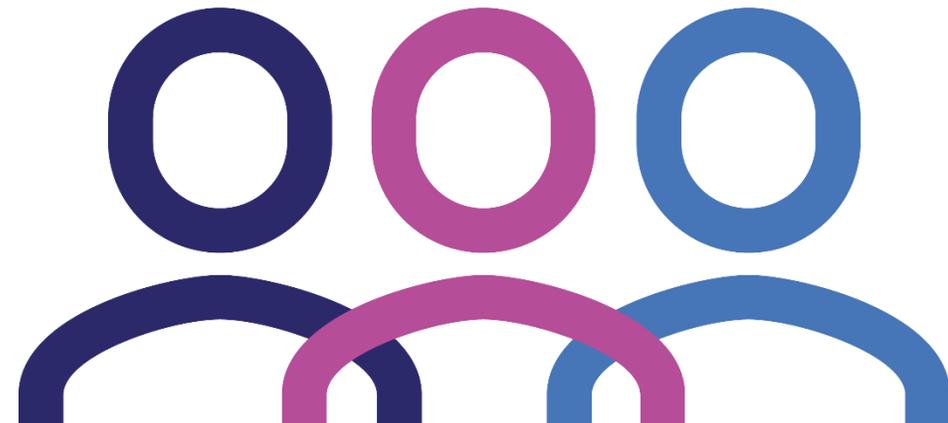


## Working with Vendors 2 of 2

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### **Be reasonable and solutions-oriented.**

- Hold vendors accountable. Be firm in your requirements. Push them to get to where they need to go
- Know that likely all your vendors will have some degree of functionality that will need to be fixed or may find themselves in a place where accessibility breaks down the road
- **Help them maintain compliance**





# Creating a Monitoring Plan

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**Monitoring plans should consider everything you've learned through the procurement process about the vendor and should be unique.**

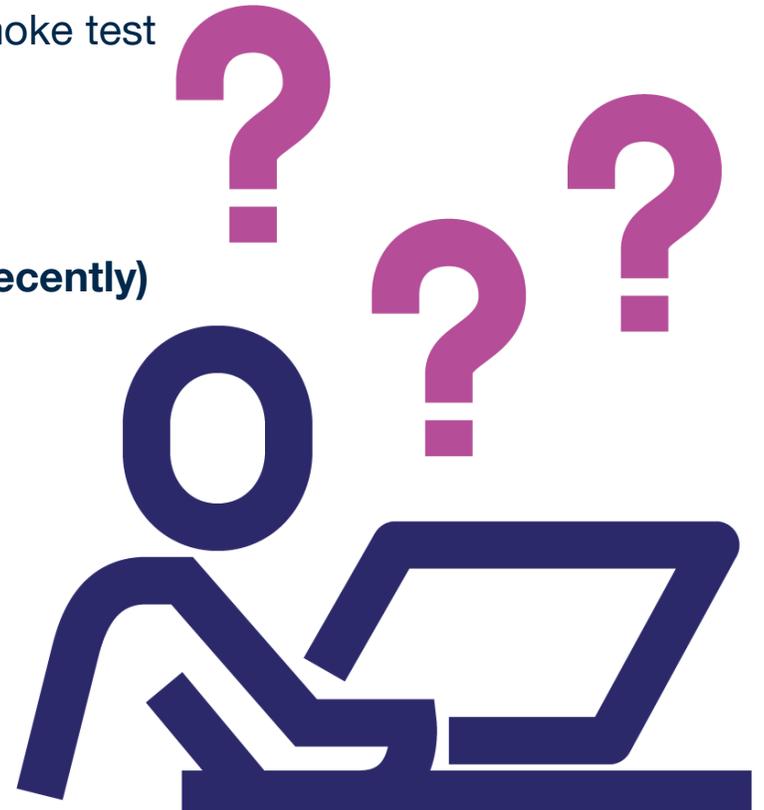
- Plans should be recorded, and schedules should be maintained with vendor documentation
- If the vendor is compliant at time the contract begins, monitoring would consist of periodic smoke testing based on vendor risk score as well as periodic full audits
- If vendor is not compliant, then it's important to help them remediate findings, get to compliance and then create your monitoring plan
- This can get costly to do at scale, which is why it's important to build vendor responsibility into the contract for commissioning periodic audits with independent third parties
- Moving auditing in-house in your organization with qualified accessibility experts can also help reduce expense

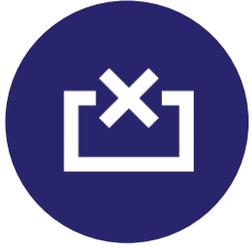


# When to Re-Audit

Assuming an audit was performed pre-selection or just after selection, vendors should be reaudited:

- ✓ When there's been a major update or redesign of the product
  - ✓ If a vendor has critical or high issues found as part of a smoke test
  - ✓ Any vendor that is otherwise found in breach
  - ✓ Once every 12-18 months
  - ✓ At contract renewal **(if an audit hasn't been performed recently)**
- Each company will have its own criteria and that will be based on factors like the size of their program, number of vendors, etc.
  - Vendors deemed higher risk should be prioritized for audits and smoke testing over lower risk vendors



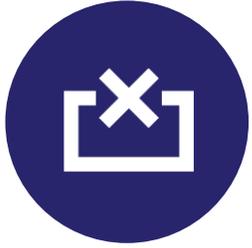


# Non-Conformance

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## Expect and plan for non-conformance:

- Likely will be found while doing routine testing as part of your monitoring program, but can be reported by customers or others
- Learn the extent of non-conformance by performing an audit or asking the vendor to commission one
- Address non-conformance with a conversation with the vendor and your internal stakeholders
- Present the findings, involve the vendor product team and explain how they can become compliant
- Persuade the vendor to agree to a written remediation timeline
- Ask for periodic progress reporting
- Never consider defects 'fixed' unless the fix is validated and accepted by the auditor
- Vendor is compliant when all findings have been verified as fixed

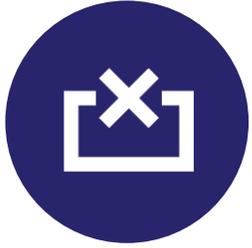


# Breach and Escalation

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**There will be times that a vendor will refuse to allow an independent auditor to audit their functionality and refuse to provide documentation that meets your standards:**

- Sometimes vendors will agree to an audit, but refuse to or insufficiently fix issues
- For these sorts of situations, it's important to escalate the issue
- First, check the vendor's contract to make sure there's accessibility language
- Then get leadership involved and explore options
- Create contingency plans
- Continue working with the vendor through the process to try to persuade them to move towards compliance



# Termination and Alternatives

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**No matter what you do, there will be some vendors that will under-perform, and you'll need to terminate the contract.**

- Consult procurement, legal and other key stakeholders during the escalation process and make sure you have a plan in the event of termination
- Sometimes you can't terminate right away and may decide not to renew the contract instead. Be practical
- Do your research and have more accessible options ready, if possible
- Know as much as you can about your vendors so that you can be ready to support teams in the escalation and contract termination phases



# Renewals

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**You should know when vendor renewals are taking place and be involved in the conversation.**

- Sometimes the renewal conversation is the first time you're interacting with a vendor and that's okay. It's never too late to make sure they're accessible

**For existing vendors, this is a great time to do things like:**

- ✓ Validate accessibility
- ✓ Add accessibility contract language if they don't already have it in their contract
- ✓ Research alternatives in the event the vendor is not compliant or unwilling to work with your team





# Accommodation Plans

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While you're working with a vendor to get them to compliance, it's important that you have a **plan in place** to make sure that all your customers or employees can access services or information.

- Create comprehensive, accommodation plans that allow the most access possible
- Make sure these plans are temporary and designed to be replaced with working functionality
- Be creative in your approach. You'll likely need several different options to reach the most people
- Be wary of quick and easy 'solutions' that claim to provide access





# Training and Toolkits 1 of 2

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**A comprehensive training and communications program can help you raise awareness across your organization.**

**As part of your training program, include a curriculum for your procurement team. This curriculum should include:**

- ✓ Why accessibility is important
- ✓ Laws and regulations
- ✓ Intro to accessibility standards
- ✓ How accessibility standards apply to different kinds of content and services
- ✓ Accessible procurement best practices
- ✓ Your accessible procurement process
- ✓ How to interpret ACRs and other kinds of conformance reports



## Training and Toolkits 2 of 2

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### Get procurement involved in your disability Employee Resource Group (ERG).

- Make sure any training you provide is accessible



**Don't have a training program? Learn how to create one here:**

<https://docs.google.com/presentation/d/1PP9rkdVEWreEyCzARCgvXBN3iqTldm7Y/edit?rtfpof=true&sd=true>

# Wrap-Up





# Lessons We've Learned

- Many vendors want you to tell them about accessibility issues and push them to do what's right
- This process can strengthen relationships with your vendors and within your organization
- If you get pushback, don't take it personally. See it as an opportunity to educate
- Vendor programs are powerful
- Tracking metrics and regular reporting are incredibly important to showing value

# Final Thoughts



- The following slides have a number of resources. **Use them**
- Know that you're not alone. **Learn from others in this space**
- Each success helps you make the case to grow and strengthen your program
- Changing minds takes time. **Don't give up**



# Resources – Building a Program

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- **Disability:IN Procurement Toolkit:** <https://disabilityin.org/home-2/>
- **University of Colorado Accessibility Toolkit:** <https://oit.colorado.gov/standards-policies-guides/guide-to-accessible-web-services/procurement-toolkit>
- **PEAT Buy IT:** <https://www.peatworks.org/digital-accessibility-toolkits/buy-it/>
- **Section 508:** <https://www.section508.gov/blog/Building-Accessibility-into-your-Procurement-Process/>
- **OZeWAI:** <https://ozewai.org/resources/getting-started-with-accessibility/>
- **California State University:** <https://ati.calstate.edu/procurement/vendor-requirements>
- **Web A11y Slack:**  
<https://web-a11y.slack.com/app>



# Resources – All About Hiring

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- **Teach Access Accessibility Hiring Skills Toolkit:** <https://teachaccess.github.io/accessibility-skills-hiring-toolkit/>
- **Writing inclusive job postings (links follow):**
  - <https://accessibleemployers.ca/resource/template-inclusive-job-posting/>
  - <https://www.openaccessgovernment.org/tips-to-ensure-your-job-posting-is-accessible/165208/>
  - <https://www.inclusionhub.com/articles/inclusive-job-descriptions>
- **Inclusive interviews (links follow):**
  - <https://www.understood.org/en/articles/8-inclusive-ways-to-rethink-your-interview-strategy-for-people-with-disabilities>
  - <https://askearn.org/page/interviews>
  - <https://www.peatworks.org/digital-accessibility-toolkits/talentworks/make-your-erecruiting-tools-accessible/talent-sourcing/pre-employment-testing/ensuring-accessible-digital-interviews/>

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**Questions?**