Recommended Roles and Responsibilities for Accessible Procurement

# ATI Designee or Other Designee(s)

The responsibilities listed below may be assigned to one person (e.g. ATI Coordinator) or shared across multiple positions on campus.

1. Ensures consistent implementation of accessible Electronic and Information Technology (EIT) procurement procedures that conform with Federal and State laws as well as CSU policy mandates
   1. Consults with buyers to develop accessibility language that will be incorporated into bids and final contracts
   2. Completes appropriate campus documentation for the ATI portions of EIT purchases while ensuring that all ATI-related documents have the required approvals and are readily available for campus personnel involved in EEAAP implementations
   3. Attends regularly-scheduled ATI meetings with campus stakeholders (e.g. ATI Steering Committee, campus working groups, ATI Procurement Community of Practice)
2. Oversees review of EIT accessibility compliance documentation for regular purchases and competitive bid procurements (e.g. RFPs, RFIs, and RFQs)
   1. Evaluates Vendor-provided accessibility conformance documentation (e.g. VPAT, Accessibility Roadmap)
   2. Reviews *Accessible EIT Pre-Purchase* form submitted by Purchase Requester
3. Develops campus strategy for selecting EIT products/services that will be evaluated for conformance with accessibility standards
   1. Selects products/services that require accessibility conformance testing based on impact criteria
   2. As needed, arranges for accessibility conformance testing to validate Vendor accessibility claims
4. Coordinates with EIT vendors to resolve issues with product accessibility support or accessibility documentation
   1. Provides feedback to Vendor, as needed, regarding issues with accessibility documentation or product accessibility support
5. Participates as a member of the EEAAP Committee in the preparation of Equally Effective Alternate Access Plans and in the evaluation of exemption requests
   1. Coordinates the development of Equally Effective Alternative Access Plans that will achieve accessibility for students, employees and members of the public
6. Serves as the identified campus contact for staff, faculty, students, and Vendors regarding accessible EIT procurement
   1. Answers questions related to purchasing accessible products
7. In consultation with the ATI Steering Committee, coordinates the delivery of accessible EIT procurement training programs for the campus community (e.g. buyers, faculty, and staff)
   1. Oversees the initial development and ongoing provision and coordination of accessible EIT procurement training programs for the campus community (e.g. buyers, faculty, and staff) including participant tracking
8. Coordinates campus communications regarding accessible Procurement Procedures (e.g. awareness campaign)
   1. Coordinates the campus roll-out of a broad-based awareness campaign regarding accessible EIT procurement procedures.
9. Acts as liaison with the Executive Sponsor and campus community regarding accessible EIT procurement issues
   1. Discusses accessible EIT procurement issues with campus Executive Sponsor and ATI Steering Committee as needed

# Purchase Requester

This ATI role describes the person who requests the product/service to be purchased or developed.

\*The completion of paperwork to order this product or service is generally completed by Administrative Support Staff (see next section).

1. Selects the most accessible EIT product/service that meets their functional requirements
   1. Completes the appropriate sections of the *Accessible EIT Pre-Purchase* document (campus-specific) including the technical and functional requirements and market research for the product/service
   2. Obtains Vendor-provided accessibility conformance documents (e.g. VPAT). Note: In the event of a formal bid, these documents may be delivered to the Procurement office.
   3. Submits the *Accessible EIT Pre-Purchase* document to campus reviewer (e.g. ATI Designee or other designee) for approval
   4. In rare circumstances where exceptions are allowed, follows the campus-specific exceptions process
2. Serve as member of EEAAP Committee
   1. Coordinates with EEAAP Committee to draft an EEAAP document

# Administrative Support Staff

This ATI role is responsible for completing and processing all appropriate forms and documentation for requester and coordinating with ATI Designee, Disability Service Office, and office of Procurement to complete the accessibility review.

1. Assists purchase requestor with completing the required request forms and processes to purchase EIT products and services
   1. Works with Purchase Requestor to complete required accessible EIT procurement documentation including:
      1. The *Accessible EIT Pre-Purchase* form (campus-specific) for review by ATI Designee (or other designee)
      2. Vendor-provided accessibility documentation (e.g. VPATs, Accessibility Roadmap)
      3. In rare circumstances where exceptions are allowed, an exception request form (campus-specific)
   2. On behalf of Purchase Requestor, submits the documentation listed above to campus reviewer (e.g. ATI Designee or other designee) for approval
   3. May be responsible for maintaining department copies of EEAAP documents for approved purchases

# Buyer (Procurement Department)

This ATI role is responsible for the verifying that ATI documents accompanying the purchase are complete and include all necessary approvals.

1. Reviews purchases of EIT products or services to ensure all ATI procurement requirements have been met
   1. Reviews requisitions to determine if requested product or services is considered EIT. If the requisition includes item(s) that are EIT, ensures that all required accessibility compliance documentation is submitted with the purchase requisition including:
      1. The *Accessible EIT Pre-Purchase* form (campus-specific) for review by ATI Designee (or other designee)
      2. Vendor-provided accessibility documentation (e.g. VPATs, Accessibility Roadmap)
      3. Initial EEAAP form
      4. In rare circumstances where exceptions are allowed, an exception request form (campus-specific)
   2. Includes accessibility during competitive bid process:
      1. Incorporates accessibility submission requirements in bid offers
      2. Ensures that Vendor bids meet all accessibility submission requirements
      3. Coordinates with ATI Designee (or other designee) to review the submitted documents
      4. Incorporates all accessibility requirements recommended by ATI Designee (or other designee) in final contract language (e.g. Accessibility Roadmap)
2. Completes all authorized purchases of EIT products and services
   1. Verifies that ATI Designee (or other designee) has reviewed and approved the requested EIT purchase
   2. Verifies that the EEAAP Committee has drafted an EEAAP for high-impact products or services
   3. In rare circumstances where exceptions are allowed, this exception is documented on the campus-specific exception form and an EEAAP is drafted for high-impact products and services
3. Maintains records and documentation of procured EIT products/services
   1. Ensures inclusion of accessibility compliance documentation in the procurement file
4. Upon request, in coordination with the ATI Designee and the requesting department(s), establishes contracts with third-party consultants to perform accessibility conformance testing

# Vendor

An EIT provider of goods/services sells or develops the product/service for a campus or campuses within the California State University system.

1. Works with the CSU system to provide documentation regarding product/service accessibility.
   1. Provides 508 conformance documentation (e.g. VPAT, testing results and Accessibility Roadmap)
   2. Specifies an accessibility contact person in the 508 conformance documentation
2. Works with the CSU system to mitigate accessibility issues/concerns in the products/services that they are providing
   1. Keeps CSU apprised of work on incorporation of accessibility standards into product or services
   2. Provides sample of product or services for testing or demonstration of Section 508 conformance

# Information Technology Staff

IT staff provide technical expertise and assistance with the purchase and deployment of accessible technology.

1. Advises the ATI Designee or other designee, campus departments, campus requester and/or campus administrative support staff on functional and technical requirements as they relate to EIT purchases
   1. Assists the ATI Designee with evaluating the functional and technical requirements of a purchase request and possible exceptions
   2. Assists the Campus Requester with developing functional and technical requirements
2. Advises the campus requester on evaluating Vendor Section 508 documentation for completeness and possible concerns prior to submitting it for ATI review
   1. Assists in the evaluation of market research
3. Serves as member of the EEAAP committee as needed

# Disability Services Staff

Disability Services staff members provide expert guidance on accommodations and assistive technologies that provide persons with disabilities with equal access to university programs and services.

1. Provides expertise as a consultant in identifying potential issues that result from the interaction between the technology and the individual user
2. Participates in the campus ATI Steering Committee
3. Participates as a member of the EEAAP Committee in the preparation of Equally Effective Alternate Access Plans and in the evaluation of exemption requests

# Executive Sponsor

This ATI role oversees campus policies, projects and implementation of the Accessible Technology Initiative. Coded Memo AA-2013-03 articulates the responsibilities.

1. Works with the campus ATI Steering Committee, to review and update the ATI Campus Plan to guide their implementation on an annual basis
   1. Conducts regular ATI Steering Committee meetings no less than twice per year
   2. Ensures that the ATI Steering Committee membership is comprised of all key stakeholder groups and includes members with appropriate experience and expertise to inform decision-making
2. Leads the implementation effort on their campus
   1. Oversees campus ATI planning process
   2. Engages in a periodic administrative review process with the ATI Steering Committee regarding challenges, milestones, resources, and documenting ongoing progress
   3. Monitors, leverages, and implements deliverables from system wide ATI activities that will advance campus efforts
   4. Ensures that ATI Steering Committee members monitor, participate in, and contribute to Community of Practice activities
   5. Channels communications from the Chancellor's Office to appropriate parties on campus
   6. Attends Executive Sponsors Steering Committee (ESSC) monthly calls

From the Executive Sponsors Meeting

* 1. Chooses activities and monitors progress
  2. Provides support and communication
  3. Risk Management