

# Section 508 Organizational Maturity Assessment Forms—Instructions

Version 1.0, October 2015

*Note/Disclaimer: These forms are used to document the state of an organization prior to, or after integrating Trusted Tester. If maturity assessment is done both prior to and after integration of Trusted Tester, the maturity differences of an organization may be more evident. These forms are not intended as an OMB assessment tutorial or guide.*

## Instructions for filling in these forms

### About this form

Use these forms to compile the data collected in your organizational Section 508 maturity assessment.

**Form A** is used for reporting general information and the maturity levels for program categories.

**Form B** is used for reporting specific measures. Use form B only when there is at least one program category reported as 'Level 4 – Measured'.

### OMB reporting

Although These forms are not intended as an OMB assessment tutorial or guide, the forms reference the location of the same information that would be collected for filling in the [Section 508 OMB Dashboard/Reporting Template](#).

Items for the OMB report are denoted in red, dotted underlined.

(These forms are more extensive in coverage than OMB reporting requirements. This assessment is designed to give a more thorough overview of an organization's Section 508 program maturity.)

### Date formats

All dates use the format d/m/yyyy.

### Closest equivalent

If your agency uses terms that are different to those in the form, use the closest equivalent selection on the form.

## Program Categories

There are 9 Section 508 reporting categories, 5 of which are included in OMB reporting requirements:

- 1) Policy
- 2) Staffing
- 3) Acquisition ([OMB Report Row 1 & Row 4](#))
- 4) Agency EIT life cycle activities ([OMB Report Row 2 & Row 4](#))
- 5) Testing & Validation ([OMB Report Row 3 & Row 4](#))
- 6) Complaints Process ([OMB Report Row 5](#))
- 7) Training ([OMB Report Row 6](#))
- 8) Outreach
- 9) Technical Assistance

## Program Maturity Levels

In **Form A**, for each reporting category, *mark only one maturity level and fill in the information under that level:*

- 1 – Ad Hoc; or
- 2 – Planned; or
- 3 – Resourced; or
- 4 – Measured.

**Note:** For categories that are marked as "4 – Measured", the actual measures should be reported on **Form B**.

### Level 1: Ad Hoc Options

For any category that is reported as "1 - Ad Hoc", use the following guidance for selecting an option:

- **Inactive/Passive:** There is no day-to-day activity for this category in the organization.
- **Reactionary:** If an issue in this category is raised by someone within or external to the organization, the Section 508 team (or other staff) will respond and attend to the individual issue.
- **Opportunistic:** The Section 508 team (or other staff) seeks out areas where this category can be addressed. However, this activity is not systematic in the organization.

### Level 2: Planned Options

For any category that is reported as "2 - Planned", select the current status of the plan. The plan should always be progressing towards a final version that can be used to transition into a higher maturity level.

### Level 3 and Level 4: Resourced and Measured Options

For any category that is reported as “3 - Resourced” or “4 - Measured”, use the following guidance for selecting an option:

- **A formal plan is being followed:** A Final Implementation Plan (or equivalent document, including policies and procedures), is in place and is in the process of being implemented, or has been followed for a period of time.
- **Informal and unplanned:** Although Resourced or Measured, staff are doing this activity without any formal policy or procedures in place. Further, there is *no plan to change this situation*.
- **Informal but formalization is planned:** Although Resourced or Measured, staff are doing this activity without any formal policy or procedures in place. *However, there is a plan to formalize this activity in the future*.

### Reporting measured values (Form B)

For any category that is reported in **Form A** as “4 - Measured”, provide the measures in **Form B**.

Some values are automatically calculated and cannot be edited manually.

### Reporting percentage applicable

[Use the following guidance for filling in OMB report Row 4 percentages:](#)

- If for any given test measure, there were no applicable items to test, enter N/A % on the OMB report.
- Only enter 0.0% for instances where there were one or more applicable items to test *and* either (i) no items were tested; or (ii) all tests resulted in ‘fail’.
- Only enter 100.0% for instances where there were one or more applicable items to test *and* all tests resulted satisfactorily passing the tests.

### What counts as “Applicable”?

Do not count exceptions (e.g., if there is a national security exception, do not count this in the total number).

### What does “Electronic documents published internally” mean?

This term refers to organization-wide communications such as bulletins, memos and reports. Do not count general emails and small-group communications. (*Note:* the applicability of Section 508 to internal publications should be conveyed in organizational Section 508 policy.)