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Angie McPherson
Sr. Web Specialist

amcpherson@naccho.org

NACCHO

Digital Resource
Analysis RFP

Response
from Astriata



Bidder's Contact Information

Aline Lin
CEO
301-618-0387 x1000
a.lin@astriata.com



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THE START OF AN EXCITING JOURNEY...

Dear Angie,

It is with great pleasure that Astriata submits this proposal to analyze the digital resources of the National Association of County & City Health Officials (NACCHO). Having carefully reviewed your RFP, we are confident that our solution will enable you to identify issues and provide insights and recommendations on a solution for the storage of these resources.

The online experience is even more critical today than it has ever been. At Astriata, we are motivated by the desire to create **effortless experiences that provide access to information that empowers people to make informed decisions**. To this point, the name Astriata is inspired by the word "striata." The striatum is the part of the brain associated with decision-making, motivation, cognition, and emotion. These aspects play an important role in the user experience and are areas that we strive to guide through human insights and data, design, and technology.

We would love to join you on your journey to discover what the ideal user experience is for your target audiences. Our plan leverages more than 20 years of experience providing user research and usability testing insights and metrics that drive results to meet our client's objectives. We'd love to discuss our proposed solution with you and your team. If you have any questions, please reach out to me personally.

Best wishes,

Aline Lin
Astriata, CEO



1.0 EXECUTIVE SUMMARY

“Delighting customers doesn’t build loyalty; reducing their effort—the work they must do to get their problem solved—does.”

—Harvard Review

The availability of great resources is often not the problem. Getting to it is. For many of our association clients, one of their most important assets is the wealth of information and resources that are offered online to both members and non-members. These resources not only establish your organization as a thought leader but they play an important role in fulfilling your mission of improving the health of communities through local health department advocacy. Over the past two decades, Astriata has seen how people consume information has evolved with the change in the digital landscape. Our mission is to ensure that people are able to easily access information online to make informed decisions. Astriata leverages over 20 years of experience in usability testing, user research, and website design and development, a proven methodology for improving the UX, and actionable recommendations from both a technical and organizational perspective that lead to measurable results.

We are excited to present the following plan for the completion of the work by June 30, 2023. The proposed cost for the required deliverables is \$23,760. Our plan is a comprehensive analysis that incorporates not only a survey and focus group but key research methodologies such as a card sort, tree test and task-based usability testing to truly understand how your members group and look for resources. Our team synthesizes these insights to recommend a pathway forward. Our technical recommendations will allow you to build the foundation to meet your goals by having an in-depth understanding of your audience and digital resources as it is today, strategizing on and implementing solutions to address these issues for your website, ensuring you are ready to meet the challenges of the future. We invite you to discover Astriata and how we are your best partner for this journey.

2.0 PROPOSED PLAN



INTRODUCTION

Astriata is uniquely positioned to assess the current organization of NACCHO's digital resources and to address the pain points of both members and staff. Over the past 20 years, we have developed a thorough UX research methodology that results in a more effective UX framework and resource management. The collection of both human insights, metrics, and data about user engagement provides a full understanding of your audience and their journey. We then apply this knowledge to inform the technical solutions for an optimal outcome.

This process is not limited to validating what you already know but it is also to discover what we did not know. It is aimed at providing a framework to understand the problem space, investigate, discover, gather evidence, and analyze user behavior and opinion that will successfully guide the strategy. This is critical in risk management and positioning the team to develop the best solution and user experience possible.

Project Kickoff

- We confirm team and project stakeholder roles
- Astriata and NACCHO review the project plan, scope, and timeline
- We discuss and agree on the objectives and desired deliverables
- Define the audiences to be recruited for the user research activities



DISCOVERY

Internal Research

- Astriata gathers existing pertinent background information and research from NACCHO such as the existing surveys and research to gain a deeper understanding of current status
- We identify any gaps in the research and information
- We identify key desirable behaviors / tasks that relevant to the external stakeholders
- Astriata reviews all areas of the NACCHO websites that house digital resources. This includes:
 - NACCHO Toolbox
 - Publications
 - NACCHO Website
 - School-Located Influenza Vaccinated Toolkit
 - WASH Resource Library
 - Immunization
 - NACCHO Blogs
 - NACCHO Virtual Community Libraries
- Astriata will first speak to the NACCHO team to better understand current processes such as how resources are uploaded
- A comprehensive summary will document the current resources, how they are presented and how resources are uploaded and accessed.

USER RESEARCH

The core of what makes our process effective is our focus on understanding your target audiences in-depth. We have experience in conducting user research through heuristic evaluation, focus groups, in-depth interviews, surveys, card testing, tree testing and task-based usability testing. It is our assumption that NACCHO will assist in recruiting participants for the research. **Recommended activities for the analysis include the following:**



2.0 PROPOSED PLAN



Survey

Number of Participants: 200 NACCHO members (including board members, one member from each workgroup, and contacts who have recently downloaded a resource in the past 6 months)

Purpose: To learn more about your audience and ideas or to provide feedback on pain points, preferences, and feedback related to the usage of NACHC resources.. The survey will allow us to reach a larger audience and provide quantitative research results.

The survey can be a hybrid of an exploratory survey, in which the participants are given open-ended questions, and descriptive research that better defines opinions, behaviors, or attitudes through multiple choice questions. Surveys are conducted remotely online.

Focus Groups

Number of Participants: 10 participants (includes at least two Marketing/Communications staff members, two Program Managers who work with developing resources, two Directors, one Membership staff member, and one R&E staff member)

Purpose: Concept preferred ways of sharing resources and why, how to improve the process of resource management and storage, and current and future resource development.

A focus group allows for exploration, discovery, discussion, debate, and finds consensus where the collective experience and dynamics allow participants to bounce ideas off one another. Focus groups are used to conduct qualitative market research. Focus groups can be conducted both remotely or in-person.

Conducting both the survey and focus group along with task-based usability testing provides some check and balances. Astriata highly recommends adding task-based usability testing aimed at understanding the user's interaction and behavior on your site beyond what web analytics, surveys, and focus groups reveal.

Moderated Task-based Usability Testing

Number of Participants: 5 per audience (suggested 2 groups of members to test different areas of resources)

Purpose: Uncover 80% of the usability issues



2.0 PROPOSED PLAN



We understand that if NACCHO members can not do or find the resources they came for, you have lost the opportunity to build the value of membership. Therefore, our usability testing revolves around the ability to complete the most critical tasks related to digital resources. It is not enough to just ask someone what they prefer to do or how they do it because often what people say is different from what they do on a website.

We believe that the user experience is not happenstance, but is rather guided and intentional. In designing the best solution for the organization of resources, we leverage baseline task-based usability testing to gain insights not available from analytics. **Through task-based usability testing we uncover the “why” behind the user’s behaviors and decisions.** In identifying the issues, we are poised to rectify them and deliver on our promise of an exceptional user experience.

- We recommend conducting 2 sets of moderated sessions with **five participants each to uncover 80% of the current usability issues.**
- Astriata gains human insights as the moderator observes the user’s behavior and follows up on their actions. We have seen time and time again how observing a user’s actions with the ability to follow-up with questions yields insightful information not available through other methods of user research.
- Hear what users are thinking as they share their thought processes out loud.
- A survey and online product reaction cards provide qualitative data on usability.
- Human insight informs the content and design strategy and functionality of the redesigned website.

What are the benefits of baseline testing?

- Gain human insights on the “why” behind the user’s action, that is not available from other tools, such as heat maps or web analytics.
- Minimize the risk of basing your solutions on assumptions about the user and their experience
- By taking a user-centric approach, we will uncover issues you did not see
- Industry experts agree that usability testing is a zero-risk investment methodology
- Real-world experience shows measurable results that demonstrate improved UX by comparing before and after data from post-launch usability testing

Steps for Moderated Task-based Testing

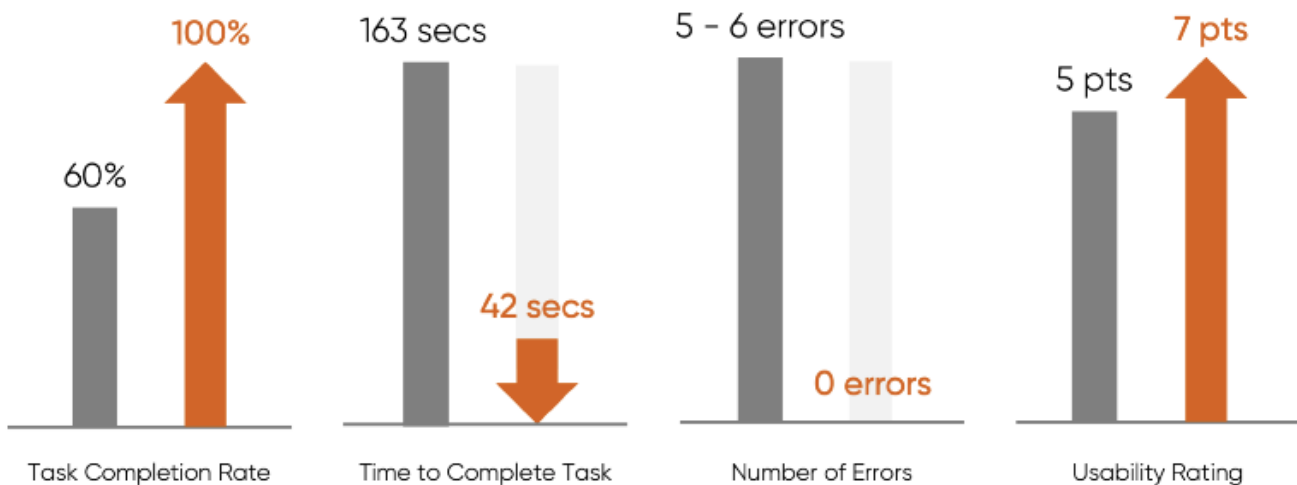
1. Identify participants for testing



2.0 PROPOSED PLAN



2. Identify important and common tasks related to resources that members want to complete
3. Astriata will write a testing script for NACCHO to review and approve
4. Astriata will assist in the preparation of recruitment. NACCHO will provide participant contact information
5. Remote testing
 - a. What is uniquely Astriata, is our usability testing application, UserHappy™
 - b. UserHappy provides a platform to create a test and recruit participants
 - c. It gives NACCHO the ability to view all recorded sessions along with highlighted transcripts
 - d. Data such as task completion, time on task, number of errors and usability ratings are provided. Below is an example of the type of improvements we have seen using our methodology of uncovering issues and implementing our recommendations.
 - e. Our testing includes a post-test survey based on the SUS questionnaire and a product reaction card activity.



6. Astriata will provide a written report based on the results of the testing. The report will include actionable recommendations and leverage our experience in design and development.



ANALYSIS AND DELIVERABLES

At the conclusion of the recommended activities, Astriata's deliverable will include:

- Documentation of current resources, how they are presented and how resources are uploaded and accessed.
- Survey summary, raw data, analysis and recommendations
- Focus group summary, recording, analysis and recommendations
- Moderated task-based usability testing, recordings, transcripts of 2 audiences
- Comprehensive report and presentation with analysis and recommendations on how to store and organize digital resources from both a technical and organizational perspective.

Our goal is to have a better understanding about how your audience engages with resources throughout all stages of their interaction/key touchpoints with NACCHO. We take a careful look at the needs of your audiences and tap into the psychology of each of them to address any challenges they might face when accessing resources. Our team empathizes with the individual to better understand motivations, barriers, and decision-making processes, and brainstorm creative ways to deliver the resources in an engaging and meaningful way to see if it resonates.

This user-centric approach ensures that the journey is not accidental, but rather a guided experience.

"Delivering some of the most actionable insights critical to make informed business decisions, UX has the capacity to create new business models that go on to become a necessary part of our evolving digital landscape and everyday existence"

– Forbes



OPTIONAL ACTIVITIES

If NACCHO would like to test new ways of organizing resources, Astriata recommends card sorting and tree testing.

Card Sorting

Number of Participants: 15+ per audience

Purpose: Discover underlying issues with navigation labeling

One of the most important benefits of your website is access to valuable content. However, the current site organization and structure can make that difficult and less efficient. This is a common issue we see! This often occurs because internal stakeholders are too familiar with the content and consequently assume that website visitors think about it the same way.

What are the risks of a poor UX?

- If users have a hard time accessing content easily, the value of membership is diminished.
- A negative brand association is likely to develop.
- NACCHO might experience a reduction in trust, because promised resources are frustrating to access.
- Over time, you experience decreased loyalty.

To reduce these risks, the first step is to evaluate the current navigation bar labels for clarity, logical order, or grouping. Participants group pages of the website and label them.

What are the benefits of card sorting?

- We gain objective feedback on logical groupings from the user's perspective.
- Astriata identifies labels that make sense to the user.
- A moderated session provides insights on what makes sense and why, allowing us to structure the new site with intuitive navigation
- The redesigned site will offer improved content structure and navigation.



2.0 PROPOSED PLAN



Tree Testing

The second step is to test the logic of the organization and relationships of the sections/pages through tree testing.

Number of Participants: 15-50 per audience

Purpose: Evaluate the organization of the pages

What are the benefits of tree testing?

- This testing gives us the ability to focus on the evaluation of the organization of content without the distraction of design.
- We gain a better understanding of relationships between pages.
- This provides valuable data on how users currently find information.
- It further informs the menu navigation structure of the redesigned site.

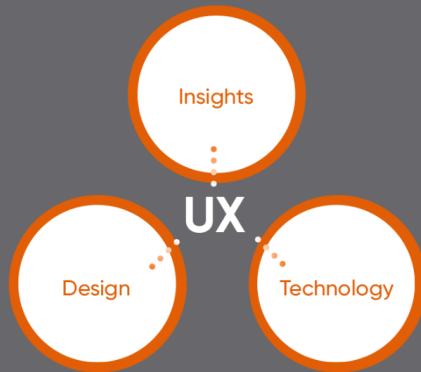


3.0 COST AND TIMELINE

The following proposed deliverables and cost are itemized for flexibility to adapt to the budget available. Please note that activities with the same week number indicates that they can occur concurrently.

DESCRIPTION	TIMELINE	COST
PROJECT MANAGEMENT		
Project coordination/Scheduling/Documentation	Mar - Jun	incorporated
RESEARCH AND DIGITAL RESOURCE ANALYSIS		
Project kickoff	Week of Mar 13	\$720
Discovery - Internal research	Mar 20 - Apr 7	\$2,520
Survey	Apr 10 - Apr 28	\$2,880
Focus Group	May 1 - May 12	\$3,240
Moderated task-based usability testing for two audiences	May 15 - Jun 9	\$12,240
Comprehensive written report, presentation of analysis and recommendations	Jun 12 - Jun 30	\$2,160
TOTAL	\$23,760	
OPTIONAL		
Card sort	3 weeks	\$2,000
Tree test	3 weeks	\$2,000

4.0 ABOUT ASTRIATA



Designed to inform. Informed by design.

At Astriata, our work is designed to empower people with the information they need to make informed decisions. We achieve this through our three core capabilities:

1. To start, we employ our **user research and user experience expertise** to inform your online strategy.
2. Next, we translate these insights and data into **purposeful design that communicates your brand and messaging**.
3. Then we implement **the right technology** to deliver the information your audience needs, when and how they need it.

The outcome is a meaningful, seamless, and engaging user experience that serves the needs of your target audience and demonstrates measurable results.

WHY ASTRIATA?

Astriata's compelling history shapes who we are today and defines what makes us unique. Two decades ago, Aline Lin co-founded Link Studio, a biomedical visual communications studio in which scientific, behavioral, and design best practices intersect. Extensive training in a unique medical and biological illustration program at Johns Hopkins School of Medicine enabled Aline to **effectively communicate and organize complex information visually for a wide range of audiences. It also taught her the importance of a**



4.0 ABOUT ASTRIATA

user-centric approach, in which key messages are teased from large volumes of information, and stories and visuals guide target audiences through dense material and content. Astriata's four key differentiators evolved from this background and 20 years of experience, including:

1. **Our robust, evidence-based methodology** incorporates user research and usability testing to help inform your website strategy. Our commitment is evident in the development of our proprietary usability testing application, **UserHappy®**. Along with discovering human insights, our process includes gathering metrics to provide you with the data to measure the effectiveness of your new UX framework.
2. **Our application of cognitive psychology principles to our design, giving you an optimal user experience.** With an in-depth understanding of how people move through information, what motivates them to move forward, and what barriers need to be overcome. Our newsletter, *Lightbox* provides **insight on psychology in design**.
3. **Our staunch belief in diversity, equity, and inclusion—and in representing** our collective experiences and perspectives, made possible, in part, through user research and testing. With our UX-centered approach, we ensure that different voices are heard and incorporated in our work, and we value accessibility. These things make us stronger as a team and produce the most effective, creative solutions for the communities we serve.
4. **Our culture of curiosity, which** propels us to stay at the forefront of design, usability, and technology. Our team at Astriata loves to problem-solve, research, try new approaches, and think creatively. Most of all, we enjoy learning about our clients, their mission, and what makes them unique. **We deliver substance.** We deliver quality. And we back up our approach and strategy with objective data. **We are your best advocates.** If you work with Astriata, you're not just a client—you are our collaborative partner. Our team not only responds to your needs but also works proactively to make you look great. After all, our success is measured by your success.

Over the last two decades, we have seen technologies come and go, new terms replace older terms, and design trends rise and fall. Regardless of these changes, the one constant that guides our approach is our focus on the user experience, and our belief that information should be easy to access. Today, our skills at Astriata fuel **our mission to empower people to make informed decisions**.



4.0 ABOUT ASTRIATA

QUICK FACTS AND STATS

- Astriata is an award-winning creative agency, **founded 20 years ago, in 2002.**
- We are **Maryland-certified as a woman-owned, minority-owned small business**, with a central location in Baltimore, Maryland.
- Our team has served more than 400 clients in both the public and private sectors, including: **associations, healthcare, nonprofit, higher-education, state and federal government agencies, and B2B.**
- Our award-winning services span branding, **web design and development, content management system (CMS) implementation and integration, print design, animation, digital marketing, social media marketing campaigns, and usability testing with our proprietary application, UserHappy®.**
- Astriata is CMS/DXP agnostic. We work extensively with **Sitefinity, Episerver, Drupal, and WordPress.**

HIGHLIGHTED AWARDS

We have helped **more than 400 clients** and won **more than 100 industry awards**. Visit our [website](#) for a complete list.

- **The Communicator Awards 2022: Award of Excellence for Annual Report, General Government:** Maryland Health Care Commission Annual Report
- **January 2022 Washington Business Journal:** Top 25 – Top Visual Art and Design Firms
- **W3 Awards 2021: Gold Award for General Marketing:** Online Video–Short Form–Geothermal Technologies
- **The Communicator Awards 2021: Award of Distinction for Associations Website:** Merchant Advisory Group
- **The Communicator Awards 2021: Award of Excellence for Corporate Identity, Logo, Government for Corporate Communications:** Maryland Health Services Cost Review Commission
- **The Communicator Awards 2021: Award of Excellence for Annual Report, General, Government for Corporate Communications:** Maryland Comprehensive Cancer Control Plan
- **The Communicator Awards 2021: Award of Distinction for Corporate Identity, Logo, Nonprofit for Corporate Communications:** Public Policy Partners
- **Digital Health Awards/Spring 2021: Bronze Award for Digital Health Media – Video – Bitten!** Mosquito–Borne Disease & You
- **The Communicator Awards 2021:** Award of Excellence for Education Website – Eurekii



5.0 RELEVANT EXPERIENCE

Maryland Health Care Commission

Contact Person	Theresa Lee, MPA, CPHQ
Contact Title	Director, Center for Quality Measurement and Reporting
Telephone & Email	443.951.4836 theressa.lee@maryland.gov
Related Service	Usability testing

Government Employee Benefits Association

Contact Person	Shelly Giuliano
Contact Title	Director, Member Programs & Communications
Telephone & Email	410.657.8060 410.657.8162 (direct) shelly@geba.com
Related Service	Usability testing, improve enrollment UX, application development

The Merchant Advisory Group

Contact Person	Beth Provenzano
Contact Title	Vice President, Public AffairsEm
Telephone & Email	952.928.4648 beth.provenzano@merchantadvisorygroup.org
Related Service	Usability testing, website design and development, CMS and LMS integration

Association for the Accreditation of Human Research Protection Programs, Inc. (AAHRPP)

Contact Person	Elyse Summers
Contact Title	President and CEO
Address	5335 Wisconsin Avenue NW, Suite 510 Washington, DC 20015
Telephone & Email	202.783.1112 esummers@aaahrpp.org
Related Service	Interviews/focus groups, usability testing, website design and development, CMS integration