

Subcommittee Sessions
Monday, February 13, 2017, 8:00 a.m.
Second Floor Meeting Room, Government Center

Finance and Personnel Subcommittee
Commissioners Beatty and Hunsucker

1. VHF Simulcast Radio System Upgrade. *Presented by Purchasing Manager Debbie Anderson, Budget and Management Director Jennifer Mace and 911 Communications Manager Brian Drum.*
2. Roofing and Additional Renovation Funding for Oakwood Elementary. *Presented by Hickory Public Schools Superintendent Dr. Robbie Adell and Budget and Management Director Jennifer Mace.*
3. Riverbend Park Platform Replacement. *Presented by Planning and Parks Director Jacky Eubanks and Purchasing Manager Debbie Anderson.*
4. Branding Contract. *Presented by Communications and Marketing Director Amy McCauley.*

Policy and Public Works Subcommittee
Commissioners Barnes and Butler

NO ITEMS FOR THIS SUBCOMMITTEE

**NOTICE – THE BOARD WILL CONDUCT A STRATEGIC PLANNING
WORKSHOP FOLLOWING THE REVIEW OF SUBCOMMITTEE ITEMS.**

Other items for Monday, February 20, 2017, 7:00 p.m. Meeting

1. Note: There will be a Special Joint Meeting with Newton City Council at 11:00 a.m. in Newton City Council Chambers – Project Longleaf.
2. Proclamation Commemorating the 100th Anniversary of the Rotary Foundation.
3. Strategic Planning Update.

Distribution

Board of Commissioners
County Attorney
County Manager
Chief Financial Officer
Assistant County Manager Dewey Harris
Assistant County Manager Mary Furtado
County Clerk
Director of Planning & Parks
Emergency Services Director
Human Resources Director
Director of Utilities and Engineering
Budget Manager
Communications and Marketing Director

MEMORANDUM

TO: Finance And Personnel Subcommittee

FROM: Debbie Anderson, Purchasing Manager
Jennifer Mace, Budget and Management Director
Brian Drum, 911 Communications Manager

DATE: February 13, 2017

RE: VHF Simulcast Radio System Upgrade

REQUEST

Staff requests the Finance and Personnel Subcommittee recommends the Board of Commissioners authorize the use of \$591,030 from General Capital Fund Balance to fund the VHF Simulast Radio System Upgrade project instead of a State 911 grant. Staff further requests the Finance and Personnel Subcommittee recommend awarding the bid for VHF Simulcast Radio System Upgrade to Wireless Communications in the amount of \$476,920.66. An additional \$114,108.43 is requested for the procurement of a five year maintenance agreement. By entering the maintenance agreement at the time of purchase the County saves ten percent (\$12,678).

BACKGROUND

The County's VHF system communicates with Fire/Rescue volunteers via pager. Pagers are a vital means of communication with volunteer emergency responders (and some paid responders), as they alert only the responders who need to respond to an emergency with relevant information. Some of the components of the current VHF equipment were installed as far back as 2002 and have now reached end-of-life serviceability.

Upgrading the VHF Simulcast Radio System will have the following benefits:

- Reduce the geographic "dead spots" between the 3 radio transmit towers (Bakers Mountain, Anderson Mountain, Hwy 16 N)
- Provide more uniform pager coverage county-wide for volunteers and first responders
- Provide cleaner "translation" (patching) between the VHF system and the VIPER system
- Improve dispatch capabilities from remote locations like proposed Hickory PD back-up site or remote incident command posts
- Shorten repair time in the event of equipment failure

In June 2016, the Communication Center submitted a grant application to the State 911 Board due a change in the General Statutes governing 911 Funds (Session Law 2015-261; G.S. 62A-47). The change allowed the State 911 Board to approve grant applications for expenditures that enhance the 911 system but do not fall within the normal 911 funding restrictions. Unfortunately, the Communication Center was not awarded the grant, due to the State 911 Board's priority of funding regional E-911 backup centers.

Additionally, Emergency Services submitted a grant request to the Charlotte Urban Area Security Initiative in November 2016. This grant was also denied due to not meeting the Urban Area Security Initiative funding criteria.

Due to the VHF system's importance in emergency communication, the Fiscal Year 2016/17 budget appropriated the project funded by a State 911 grant and recommended that the County use General Capital Fund Balance to fund the project if the Communication Center was not awarded the grant or was awarded a partial grant. Now that the grants have been denied, the budget needs to be amended to authorize the use of General Capital Fund Balance as the funding source for the project.

Requests for Proposals for the VHF Simulcast Radio System Upgrade were issued and two proposals were received:

Wireless Communications	\$476,920.66
RCS Wireless Technology	\$489,747.00

Wireless Communications has been a major partner with Catawba County Communications for several years; they are the most familiar with our current systems and are under contract for service. Wireless offered the best proposed system.

Staff including Bryan Blanton, Brian Drum, Debbie Anderson and David Fox evaluated the proposals and scored based on 1) total cost of ownership; 2) proposed solution; and 3) vendor experience and performance. Wireless Communications scored 100 points and RCS scored 70 points.

RECOMMENDATION

Staff recommends the Finance and Personnel Subcommittee recommends the Board of Commissioners amend the Fiscal Year 2016/17 budget to authorize the use of \$591,030 in General Capital Fund Balance to fund the VHF Simulast Radio System Upgrade project instead of a State 911 Grant. Staff further requests the Finance and Personnel Subcommittee recommend that the Board of Commissioners award the bid for the VHF Simulcast Radio System Upgrade to Wireless Communications in the amount of \$476,920.66.

TRANSFER:

From:

410-460100-631627	NC 911 Funds	\$591,030
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To:

410-460100-690100	Fund Balance Appropriated	\$591,030
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MEMORANDUM

TO: Finance and Personnel Subcommittee

FROM: Jennifer S. Mace, Budget & Management Director
Dr. Robbie Adell, Superintendent, Hickory Public Schools

DATE: February 13, 2017

SUBJECT: Hickory Public Schools Oakwood Roofing & Renovations

Requested:

Hickory Public Schools requests the Finance and Personnel Subcommittee recommends the Board of Commissioners approve an additional \$393,181 for the Oakwood Renovations project.

Background:

The Fiscal Year 2016/17 budget includes \$1,465,000 for renovations to the old section of Oakwood Elementary. Planned renovations include:

- Upgrading the HVAC system from a 2-pipe to a 4-pipe system. The existing system only allows for heat or air at one time. The old system is out of date, inefficient, and problematic for properly controlling temperatures, particularly when temperatures are still cold in the morning but warm in the afternoons.
- Removal and replacement of an exterior wall that is leaking.
- Repair of roofing, ceilings, and paint plus asbestos abatement for areas impacted by the renovations.

Bids were received on February 7 and the low bidder for the project was \$1,648,000, before allowing for 8% architect and engineering fees. The bid does include a \$100,000 contingency allowance. Hickory Public Schools would like to take \$330,000 from a \$2,135,000 renovation project at Hickory High School scheduled for Fiscal Year 2017/18 to build an auxiliary gym. The System is reconsidering its priorities and does not plan to move forward with that project at this time.

Additionally, a section of the roof is leaking and beginning to cave in. The System has a quote for \$62,800 to complete the repair and requests that \$63,181 remaining in the Longview Elementary School project be transferred to the Oakwood Renovation project to address this need.

Recommendation:

Hickory Public Schools requests the Finance and Personnel Subcommittee recommends the Board of Commissioners approve an additional \$393,181 for the Oakwood Elementary Renovations project, funded by a reduction in the future renovations project planned for Hickory High School and transferring remaining funds in the Longview Elementary School project.

Supplemental Appropriation:

423-740050-690450	Proceeds – Installment Purchase	\$330,000
423-740100-863200-32108-3-04	Oakwood Elementary Renovations	\$330,000

Transfer:

From:

423-740100-863200-32106-2-01	Longview Elementary School	\$63,181.39
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To:

423-740100-863200-32108-3-04	Oakwood Elementary Renovations	\$63,181.39
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MEMORANDUM

TO: Finance and Personnel Subcommittee

FROM: Jacky Eubanks, Director of Planning and Parks
Debbie Anderson, Purchasing Manager

DATE: February 13, 2017

IN RE: Riverbend Park Platform Replacement

REQUEST

Staff requests the Finance and Personnel Subcommittee recommends the Board of Commissioners approve the appropriation of an additional \$24,675 to replace the wooden observation platform at Riverbend Park destroyed in the 2013 flood with a concrete reinforced platform and award the construction contract to the lowest bidder.

BACKGROUND

The original wooden observation platform was constructed in 1999 during a record NC drought. The 1st flood to occur after it was constructed was a result of Hurricane Frances in September 2004. The second major flood was in Jan 2010. The deck was submerged under four feet of water and the foundation was further weakened and damaged. The final flood in May 2013 completely submerged the platform and tore it from its foundation. Due to the site's close proximity to the Oxford Dam's tailrace and the significant turbulence created as a result of opening and closing the gates to address floods, an engineered concrete platform is necessary to survive the extreme flood conditions possible at the site. Engineered concrete platforms have been utilized at numerous Duke Energy dam tailraces in NC and SC.

GRANT. Duke Energy created the Water Resources Fund Grant to benefit waterways in the Carolinas and neighboring states. The fund was set up in the amount of \$10 million, with maximum recipient grants of \$100,000 as a result of the Dan River problem. The grant funds were set up to provide direct benefits in at least one of the following focus areas:

- Improving water quality, quantity and conservation;
- Enhancing fish and wildlife management habitats;
- Expanding public use and access to waterways; or
- Increasing citizens' awareness about their roles in protecting water resources.

Catawba County saw this grant source as an excellent opportunity to assist in the construction of a new reinforced platform. The County is required to replace the deck since it was originally funded through a NCPARTF Grant in 1999. Three requests have been made to restore accessibility and increase stability by replacing the wooden structure with a concrete platform/observation deck, along with constructing signage/kiosks depicting the history, benefits as well as increasing awareness in protecting the river in association with Oxford Dam.

1st Submission. Catawba County received an estimate provided by Hulsey, McCormick & Wallace in the amount of \$140,000 in early 2014. Based on that estimate, the County submitted a request for the Duke Energy Water Resources Fund Grant on 11/20/2014 for \$100,000, the maximum amount allowed under the grant. The County was not awarded this grant, but was invited to resubmit in the following round.

2nd Submission. Catawba County received a second estimate provided by TGS in the amount of \$160,000. This second estimate went into more detail based upon Duke Energy's request. A revised grant application was submitted on 8/7/2015. The Water Resources Committee "deferred" this application to the next round pending the following:

- Approval from the Federal Energy Regulatory Commission (FERC), or a written statement indicating that the platform would not be prohibited. (FERC replied that the platform was not located within the FERC boundary so it was not affected by their regulations.)
- Clarification that the County's monetary share of the platform was budgeted, as opposed to pending.
- Detailed construction drawings with associated cost estimates as opposed to detailed design drawings with cost estimates.

3rd Submission. A third application was submitted 1/21/2016 with the additional information and cost estimate of \$160,000 provided by TGS. The Water Resources Fund awarded the grant to the County in early spring of 2016 with the stipulation that the County not publicly acknowledge the grant until Duke Energy had the opportunity to make its official announcement to the recipients.

Based upon that award, the County advertised for RFQs to select an engineering firm to design and manage the permitting and construction process associated with replacing the platform. TGS was selected and awarded a contract in the amount of \$35,000. TGS in concert with Catawba County moved forward with preparing the construction bid documents and the advertising process.

CONSTRUCTION BIDS & Other Costs

Two companies submitted bids to construct the platform:

- Brushy Mountain Builders, Inc. for \$231,000
- R.E. Burns & Sons Co., Inc. for \$209,250

The primary reason construction bids came in significantly higher than TGS's initial construction estimates is related to the depth of bedrock. Once site borings were completed, the bedrock layer that the structural steel is placed within was found to be approximately 10 feet deeper than originally estimated. This resulted in considerably higher material and labor costs. This type of construction is also very specialized, and there are a limited number of qualified installation contractors available to bid on these types of projects.

In addition to the construction cost, funding for the following is needed resulting in a total project cost of \$254,250:

- \$35,000 for TGS as noted above
- \$10,000 for kiosks and supporting materials and supplies

FUNDING PRIORITIES AND ADDITIONAL FUNDS

Beginning in Fiscal Year 2015/16, Parks identified several capital needs for Riverbend and Bakers Mountain Parks to be addressed over a multi-year period. Through a combination of existing and new funds, \$127,550 was made available to begin addressing these needs, including the County's anticipated \$60,000 share of the platform. The Fiscal Year 2016/17 budget included allocation of the \$100,000 Duke Grant and an additional \$61,500 to repair the picnic shelter, replace picnic tables, replace chairs and tables for the education/meeting building, update traffic signage, replace roofs, and resurface asphalt Riverbend Park. Parks would like to repurpose the \$61,500 allocated this year plus \$8,075 remaining from the 2015/16 allocation to replacing the observation platform. Replacing the platform is a higher priority in the short term due to the fact it was an original activity funded by the 1999 PARTF grant, and must be replaced in order to

be in compliance with PARTF guidelines. The other items, while important to the overall maintenance and operations of Riverbend Park, can be postponed to future fiscal years. After applying the funds already available in the Parks Improvement project, \$24,675 is still needed to complete the project.

RECOMMENDATION

Staff requests the Finance and Personnel Subcommittee recommends the Board of Commissioners approve use of the existing funds in the Parks Improvement project and allocate an additional \$24,675 from general capital fund balance to replace the observation deck at Riverbend Park. Additionally it is requested that R.E. Burns & Sons Co., Inc. be awarded the contract in the amount of \$209,250 to construct the new observation deck.

Supplemental Appropriation:

410-460100-690100	Fund Balance Applied	\$24,675
410-460100-988000	Park Improvements	\$24,675

MEMORANDUM

TO: Finance and Personnel Subcommittee

FROM: Amy McCauley, Communications & Marketing Director

DATE: February 13, 2017

RE: Catawba County Community Branding Proposal

REQUEST

Staff requests the Finance and Personnel Subcommittee recommends the Board of Commissioners authorize a contract with North Star in the amount of \$83,000 for development of a Catawba County community brand platform and amends the fiscal year 2016/17 budget to approve a supplemental appropriation of \$48,000 to fully fund the proposal.

BACKGROUND

The Catawba County Board of Commissioners is leading a countywide strategic planning process to increase and retain its working-age population and employer base. The Board is taking action with various partners across multiple growth sectors to boost economic growth and enhance quality of life in ways that will appeal to these target audiences.

To complement this work, the County is seeking to establish a community brand platform that positions Catawba County as a community of choice for the working-age population and new/relocating businesses. The key benefits of a County brand platform include the following:

- A County identity/message that aligns with the Board's vision, effectively promotes the County's strengths to target audiences, and resonates with current residents
- The connection of Catawba County to the Charlotte/surrounding region with enough differentiation to position the County as a desirable and distinct option for staying/relocating
- A brand story that complements, rather than competes with, our diverse municipal, tourism, and economic development assets and is promoted in concert with key partners

A request for proposal was made to North Star Destination Strategies (North Star), a community branding firm based in Nashville, TN, due to their experience with and knowledge of our community from both their recent branding work with the City of Hickory and their current branding work with the City of Newton. North Star has worked with more than 200 communities in 42 states, including cities such as New Orleans, LA; Sacramento, CA; Newark, NJ; Gainesville, FL; and Fargo, ND, and counties such as Miami County, OH; Green County, WI; Quincy & Adams County, IL; Goldsboro/Wayne County, NC; and Snohomish County, WA.

A proposal from North Star in the amount of \$83,000.00 is attached with this memo. The proposal covers the following scope of work:

- Quantitative and qualitative market research to determine optimal brand positioning for the County (includes multiple site visits, focus groups, surveys, and one-on-one interviews) – the Commissioners will participate in one-on-one interviews during the research phase
- Research summary and strategy recommendations presented to the Board of Commissioners and other stakeholders
- Development of creative components: brand identity (logo) and style guide; brand messaging, including tagline
- Review of proposed brand components by Board of Commissioners for feedback prior to finalization
- Final presentation of brand platform to Board/community
- Brand activation plan outlining strategies and timetables to effectively launch, execute, measure, and evaluate brand delivery within and outside of Catawba County, including strategies that can be implemented in concert with other local and regional initiatives

The estimated timetable for execution of the brand development proposal is 32-34 weeks (8-to-8½ months).

Coordination of North Star's brand development work and implementation of the County's brand activation plan would be managed by the County's Communications & Marketing Director in collaboration with the Board of Commissioners and County Management. Along the way, input and feedback will be sought from community members and partners, including Catawba EDC, Catawba County Chamber of Commerce, Hickory Metro Convention & Visitors Bureau, and our local municipalities.

Funding for the contract is recommended from a combination of funds as follows:

- \$35,000 already approved in the Fiscal Year 2016/17 budget for economic development marketing.
- \$48,000 from unallocated ¼ cent sales tax proceeds, based on year-to-date collections exceeding budgeted amounts.

RECOMMENDATION

Staff recommends the Finance and Personnel Subcommittee recommends the Board of Commissioners authorizes a contract with North Star in the amount of \$83,000 for development of a Catawba County community brand platform and amends the fiscal year 2016/17 budget to approve a supplemental appropriation of \$48,000 to fully fund the proposal.

REVISION:

110-420050-611455	¼ Cent Sales Tax	\$48,000
110-420050-841516	Marketing	\$48,000



NORTH  STAR

Catawba County BrandPrint
December 5th, 2016

WWW.NORTHSTARIDEAS.COM



INTRODUCTION

SITUATION

Earlier this year the Catawba County Chamber of Commerce was honored by the Association of Chamber of Commerce Executives by being announced as a 2016 Chamber of the Year. While this honor is a great symbol of the innovative work that Catawba County has done to create a prosperous environment, this community is not unused to praise and accolades. In fact, major publications and associations have been regaling the region with awards for decades –Hickory’s first of three All-America City Awards was back in 1967– essentially announcing to the world that Catawba County is an ideal place to live, work, and conduct business. As a result of this, the leadership within Hickory recognized the opportunity that was already within their own hometown and neighbor communities, and built upon that success by conducting a branding initiative to effectively articulate what these award-granting organizations have been saying for years: And the momentum has continued to build. Hickory was named the 10th best place to live and raise a family by *Reader’s Digest*, Maiden landed one of Apple’s largest data-centers in the world, *Forbes* named the Hickory-Lenoir-Morgantown MSA as the 3rd best MSA in the country for business cost, and the list goes on. Perhaps the most tangible example of the area’s growing self-confidence was the 2014 passage of the \$40 million ‘Boost Hickory’ bond, to invest in economic development efforts. Now looking to further energize this success, the leaders of Catawba County are looking to create an umbrella, regional brand to help support and identify all of this great work. Fortunately for Catawba County, its unique story is already there within the sweeping views of Bakers Mountain, now it’s just a matter of discovering it.

SOLUTION

Over the last 16 years North Star Destination Strategies has partnered with more than 200 unique communities coast to coast, helping them become more competitive. Bottom line . . . communities are our passion. Many of these projects have brought us to North Carolina, including a successful initiative in Hickory and currently beginning work with Newton. We consider it a privilege to have had a small role in the success of Catawba County, and are excited about this opportunity.

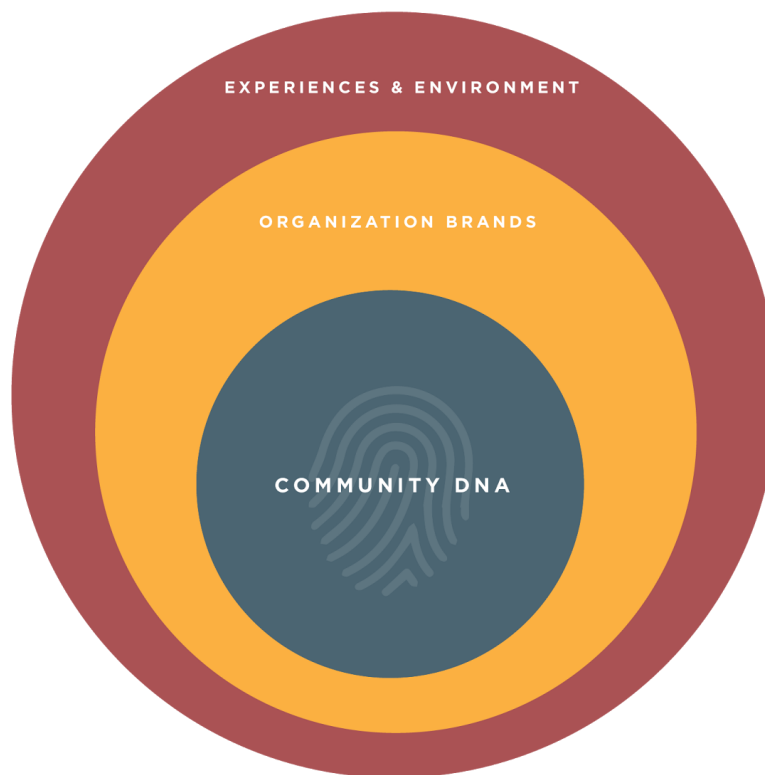
Nationally North Star has collaborated on high-level initiatives with states including Florida and Mississippi and well known cities such as Jacksonville, Florida; Newark, New Jersey; Providence, Rhode Island; and Sacramento, California; along with smaller communities like Dandridge, Tennessee; Petersburg, Alaska; Sebastopol, California and West Plains, Missouri. All that varied expertise is important for Catawba County because you want a firm with the chops, credentials and gravitas to manage your community branding project. Despite the size and import of the initiatives we work on, North Star is a small company and our same blue-ribbon team works on every project.

After our discussion regarding your situation and goals, we believe the following proposal outlines everything you’ve asked for and more: A long-term strategy rooted in a strong foundation of research, working to illuminate the positive themes identified within Catawba County, leading to the creation of creative deliverables and an action plan that will complement your countywide strategic plan to increase and retain its working-age population and employer base.

PHILOSOPHY

North Star will not “create” the new Catawba County umbrella brand. It already exists in the very DNA of your community . . . that something special that defines the county’s essence. Rather we will uncover it and bring it to life in ways that have meaning for all your constituencies.

Uncovering Catawba County’s unique DNA is essential to the success of all the marketing and community-building efforts that follow. Just as an individual’s DNA determines everything from how that person looks to how that person acts (as well as their health and vibrancy), your DNA should be the foundational touchstone for everything in your county from marketing to infrastructure to policy. As such, the heart of any truly impactful brand is a research-driven and authentic DNA Definition.



Once identified, this DNA Definition can drive consistent and powerful communications, focus brand development, shape experiences, impact your built environment and more. Because this DNA is central to whom Catawba County is as a whole, it has the capacity to drive the brands for all your partner agencies, initiatives and campaigns.

Think of it this way. All the players in your county are like the sections in an orchestra – different instruments, different sounds, even different sheet music. The Catawba County DNA is the score that brings the diverse contributions of all these sections together into something harmonious and meaningful.

SCOPE OF WORK

1. RESEARCH

This compiled body of data points us in the direction we need to go to craft your story as a hub of talent, opportunity, and innovation that retains ties to its roots and historical nature. You will notice both qualitative and quantitative studies included in this recommended matrix. North Star strongly advocates a mixed method approach to research because it will tell you not just “How, When, What and Where” but also “Why”. Only through mixed methodology can your community obtain a true picture of where your brand is now, why, where it should be and how that preferred identity can best be accomplished.

Situation Analysis: This study establishes the current lay of the land from the perspective of your critical partners and different municipalities. We both administer a questionnaire to each internal group or organization and meet with these groups to more fully understand your primary objectives, general history, political landscape, resources, competitors, etc.

Research, Planning, Communications and Media Audit: We conduct a comprehensive review of any relevant research and planning documents. In addition, we review and analyze existing marketing materials, branding, logos and messaging from public and private sector partners, municipalities within the Catawba County area, as well as recent press related to Catawba County.

Familiarization Tour: Tour and analysis of commercial sites, business parks, schools, housing developments, downtowns (e.g. Downtown Newton), retailers, restaurants (e.g. BOCA), outdoor rec areas, parks (Bakers Mountain Park), the arts (e.g. Western Piedmont Symphony), etc.

Key Stakeholder Interviews & Focus Groups: Some of our most valuable nuggets for the purposes of defining your DNA and crafting your creative work come from these intensive one-on-one interviews and focus groups with key stakeholders (including leaders from county staff, real estate agents, HR managers, elected officials, business community, schools, recruiters, etc.). We also want to talk to articulate individuals who are passionate about the Catawba County area (poets, coaches, ministers, historians, matriarchs, patriarchs and more). We know you want us to talk to everyone, so we continue the conversations via phone once we get back to the office. Because we can react to the information they give us with original questions, these interviews often lead us down exciting discovery paths not revealed by quantitative surveys.

Quantitative Perception Study: This survey is conducted using a statistically significant random sampling of consumers and non-consumers in outside markets using existing inquiry records and consumer panels. Data will be cross-tabulated in a number of ways to reveal the most insightful patterns between consumer and non-consumer groups. For instance, perceptions and attitudes for those who have visited Catawba County will be compared and contrasted to those who have not visited and are reporting perceptions purely on reputation. This Consumer and Non-Consumer Awareness and Perception Study measures:

- Overall awareness and perceptions of Catawba County.
- Overall awareness and perceptions of the competition.
- Measurements of Catawba County's delivery of quality of life indicators.
- Consumer experiences with Catawba County.
- Attitudes regarding Catawba County's strengths and weaknesses.
- Consumer opinions regarding what needs to be added or taken away.
- Changes in consumer perceptions after experiencing Catawba County

Influencer Perception Study: Working from a combined list compiled by North Star and the County, we conduct phone interviews with opinion leaders in varied positions within the greater Charlotte region. Members of the press, prolific bloggers, promoters, cultural figures as well as leaders in economic development, tourism and local government officials will be contacted. Additionally, we will reach out to state level executives in economic development and tourism. Our target number of interviews is 20. This casual, qualitative study with leaders outside Catawba County uncover valuable 30,000 ft. perspectives.

Competitive & Contextual Positioning Review: A brand message and marketing strategy analysis to evaluate the Catawba County's regional position relative to the competition in the state and in the region; as well as providing a 'best practices' analysis for employee recruitment across the nation.

2. INSIGHTS & STRATEGY

Our insights come from asking a number of thought-provoking questions: What brand “story” does the research tell? What distinguishes the Catawba County area today? How does the current brand fit into the consumer’s lifestyle? How can the brand best be used to elicit the Catawba County region’s desired emotional or behavioral responses? These insight questions are compiled in a succinct storyline that leads directly to the Catawba County area’s strategic DNA statement. Your DNA statement is the **critical touch point for all branded activity moving forward**.

Situation Brief & Insight Development: The sharpest research and strategic minds at North Star gather with our team members in Catawba County to review all research findings. Data on its face has limited value but the connections between data points open up understanding and opportunity. The entire team led by CEO Don McEachern weaves together these connections into a compelling set of insights that start to tell the Catawba County region story.

DNA Definition: Based on those insights, this guiding statement for your brand is developed. This definition should serve as the touch point for all Catawba County area activity moving forward. Many of our communities reference their DNA Definition when making decisions about everything from policy to infrastructure improvement to promotions. Included in your DNA definition is:

<i>Target audience:</i>	<i>For whom the Catawba County region has the most appeal</i>
<i>Frame of reference:</i>	<i>Geographic context of the Catawba County region</i>
<i>Point of difference:</i>	<i>What makes the Catawba County region special</i>
<i>Benefit:</i>	<i>Why it should matter to the consumer</i>

“Research and Strategy” Presentation: This presentation represents a critical juncture in the project. We prepare a comprehensive review of all relevant research, insights and recommended DNA Definition. A preview of this presentation is shared with key branding committee members for purposes of editing and fine-tuning. The collaboratively perfected presentation is then made at a larger stakeholder meeting. DNA Definition approval is required before proceeding.

3. CREATIVITY & DESIGN

In this stage, all insight and strategy are transformed into tangible creative products that embody the Catawba County area. An in-depth creative workshop guides this work. Straplines, logos, color and messaging (with graphic standards) are created. Additional deliverables will also be developed to express the new brand identity in the context of its future use. All of these visual representations of the Catawba County regional brand identity can work to impact sub brands as well; allowing partner organizations to leverage the Catawba County region DNA and further unify the region's identity.

Creative Workshop: A collaborative, interactive meeting between the North Star team and Catawba County creative team that explores the roles of different creative elements and identifies creative preferences. Our goal is to most effectively hone in on the type of work you want without limiting the creative thinking of our writers, graphic designers and art directors. This meeting is always lots of fun for everyone involved.

Naming Recommendations: Based on the research and approved Strategic Brand Platform, North Star will present options for names for the Catawba County region including rationale and support for each Sub-brand, such as the K-64 Education, will also be discussed.

Straplines & Rationale (5): A strapline is not the be-all and the end-all for your brand. But it is the start of the story. Depending on how safe or edgy you want to be, the Catawba County area strapline can capture people's attention immediately and pique their curiosity or it can serve as a solid, hard-working tool that starts the job of positioning the Catawba County area in the minds of consumers. North Star will provide a minimum of three different straplines along with rationales for the strengths of each line. We also conduct trademark and Google searches to ensure the availability of each line. This is a critical step and one often overlooked by many professionals. But there is nothing more frustrating than getting to the end of the project with a strapline that is not available to you.

Logos (8): These logo options will represent a range of options. We will also provide a round of revisions to the selected options. We design this logo with and without the state name and with and without the strapline in both a vertical and horizontal lockups, representing all the different ways you will use it.

Logo Family: North Star is known for its logo families and we want to make sure key stakeholders in the Catawba County region have access a version of the mark they can use. We will also provide details on the framework to be used in any number of ways moving forward.

Color Palette (2): We start by developing logos in black and white to reduce color bias. But once that decision is made we open the possibilities visually by allowing you to select between two very different palettes. This is a key decision in how your visual brand identity will "feel" since color evokes emotion

Looks (2): Think about it. If the only tools we gave you were a logo and a line, then all you would be able to do is put that logo and line on stationery, t-shirts and the top of your website. We go far beyond that, crafting two entirely different visual looks that allow you to choose how your brand messaging will be conveyed in terms of headlines, photography style, special graphic elements or detailing and copy points. The creative committee will select one look and it will be applied to all subsequent deliverables.

Graphic Standards Guide: This guide contains all necessary information for using your logo, color, typefaces, language, narrative and other key elements to ensure consistency across all mediums and from any organization. We provide digital and printed versions of this Guide as well InDesign files so you can edit as necessary.

Brand Narrative: Your DNA Definition is the core or what makes the Catawba County area special. The narrative takes that core and describes it in artistic and compelling language for connecting emotionally with your different consumers. The narrative defines your personality and the Catawba County region tone of voice. It can be woven into ad copy, placed on websites, integrated into speeches and distributed to businesses to use in their own communications about the place they call home. The more it is used, the more widely your message is dispersed.

Custom Deliverables (8-10): To assist in the communication of the final logo concept, we will work with you in identifying a list of 8-10 custom deliverables that target your specific goals. This is a powerful addition as it brings the logo to life in the real world. Examples include:

- Print and Electronic Advertising
- Website Design
- Digital Banner Advertisements
- Email Marketing Design
- Social Media Application
- Marketing Materials for Partners
- Billboard Design
- Economic Development Folder
- Local Partner Brand Application
- Stationery Package
- PowerPoint Template(s)
- Merchandising
- Wayfinding and Signage

4. ACTION

In this stage, North Star develops a must-do strategic action and communications plan following your brand's development. This plan comprises fundamental action steps that ensure the brand gains traction and maintains momentum. Many of these tasks involve setting up the organization and cooperation that will propel your brand forward. Our goal - and yours - is to make sure that the Catawba County regional brand is the guiding principle for your collective future, not just a logo and line on your letterhead.

As part of this action plan, we will craft a selection of high-impact custom action ideas designed to raise the profile of your brand and put it to work in every corner of the Catawba County area. Custom ideas generally fall into the following categories:

- **Digital Marketing / Social Media** (application across your social platforms and into the digital space)
- **Sports** (tournaments, events, youth sports, etc.)
- **Environmental Applications** (look at your community as if it were a canvas)
- **Purpose Initiatives** (charities, sponsorships, etc.)
- **Festivals** (repackage existing events/festivals or develop new ones that connect to your brand strategy.)
- **Arts** (public art campaigns, partnerships with art organizations, art contests with visitors, residents, students, artists in residence programs.)
- **Private Sector** (ideas and tools to engage businesses and other private sector organizations.)
- **Exports** (goods that are manufactured, grown or packaged in your community for export; even a famous person or idea from your community can be considered an export.)
- **Awards** (civic awards, organizational awards, etc.)
- **Education** (programs in schools, small business/entrepreneur mentoring, education for front-line hospitality staff, etc.)
- **Sustainability** (residential green initiatives, tax incentives for green industries, etc.)
- **Health** (community health programs, school-based health initiatives, business-based health initiatives, hospital and health care agency partnerships.)
- **Events** (any organized activity that ties back to the brand ranging in scope from festivals to health fairs to career counseling to community clean-up days.)
- **Master Planning** (design and development of infrastructure and support systems that correlate with the brand strategy.)

5. EVALUATION & RESULTS TRACKING

Evaluation yields new information, which may lead to the beginning of a new planning cycle. Information can be gathered from concept pre-testing, campaign impact in the marketplace and tracking studies to measure a brand's performance over time. Ideally, two basic questions will be answered: have responses to the brand among target audiences changed in the way the BrandPrint intended? And have these changes resulted in action that will achieve the desired objectives of the brand?

No single measure of success works for something as complicated as a community brand. As such, every research study in this plan is designed to produce benchmarks and results that can be used for comparison with future studies in areas of advocacy, return on investment, perceptions of the existing Catawba County regional brand and attitudes regarding how well the Catawba County area performs as a place to live, visit and do business. Additionally, our 15 years of branding experience have shown that true success can be seen in the spread of excitement, inspiration and innovation among your stakeholders around the brand. This is a "soft measurement" but it is vitally important. North Star builds hours into our BrandPrint process for mentoring with our clients. Your success is our success, and everyone at North Star - from the president and CEO to the office manager to our research assistants - takes the success of our clients personally. Toward that end, we are always available to answer questions and help with problems. In short, we have maintained an ongoing personal and business relationship with most of our clients, some for more than a decade.

12-Month Follow Up: We follow up after a year of your brand implementation to discuss the successes enjoyed and hurdles that you are working to overcome. We provide suggestions and direction for next steps in your continual brand integration.

TIMELINE

Getting started call	Week 1
Research	
Situation analysis	Weeks 1 – 2
Research and planning audit	Weeks 1 – 2
Communication and media audit	Weeks 1 – 2
In-market (tour, focus groups, interviews, mystery shop)	TBD
Consumer Awareness & Perception Study	Weeks 6 – 10
Competitive & contextual positioning review	Weeks 6 – 10
Insights	
Situation brief & insight development	Week 11
DNA definition development	Weeks 11 – 13
Understanding and Insights presentation	Week 14
Creativity	
Creative brief development (internal)	Week 15
Creative workshop	Week 16
Foundational creative development	Weeks 16 – 26
Custom deliverable development	Weeks 25 – 27
Action	
Action plan development	Weeks 27 – 30
Final report development	Weeks 30 – 32
Proposed Timeline	Weeks 32 – 34

Timeline is dependent upon how quickly approval and data from client is received at key milestones

INVESTMENT

Partnering with Catawba County is not a responsibility we take lightly. As such, if it becomes necessary, we are interested in collaborating with Catawba County leaders and stakeholders to create an even more custom scope of work for perfecting this important initiative.

Education, Research & Strategy	\$37,000
Creativity & Action	\$46,000
TOTAL	\$83,000

This cost proposal has been calculated by third party costs associated with the research (i.e. Qualtrics Consumer Panels) and North Star's blended hourly rate of \$150/hr. Travel costs are included in the above.

REFERENCES

All of the following references are past clients with similar scopes of work and situations to Catawba County. You can also view testimonial videos and council responses to our work here:

http://northstarideas.com/testimonials_branding

Miami County, Ohio

Ms. Diane Thompson
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Miami County Visitors Bureau
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Lee's Summit, Missouri

Mr. Steve Arbo
City Manager
City of Lee's Summit
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Quincy & Adams County, Illinois

Mr. Marcel Wagner
Great River Economic Development Found.
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West Plains, Missouri

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Community Marketing Director
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Yukon, Oklahoma

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Concord, North Carolina

Ms. Deborah Clark
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Petersburg, Alaska

Ms. Liz Cabrera
Director, Community & Economic Dev.
Petersburg Borough
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Manassas, Virginia

Ms. Patty Prince
Public Affairs Specialist
City of Manassas
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Toe River Arts Council, North Carolina

Ms. Denise Cook
Executive Director
Toe River Arts Council
828.682.7215
denise@toeriverarts.org

KEY PERSONNEL

DON MCEACHERN **President & CEO**

Don McEachern has been growing research based brands for more than 20 years. His experience includes working for multinational advertising agencies as well as nationally recognized creative boutiques. During his time in the ad world, McEachern put his stamp on some of the world's most famous brands including Goldkist, Hawaiian Tropic, Suntory Bottled Water Group, Trump Plaza, Panasonic and Lanier Worldwide. For his efforts he received numerous awards, including a prestigious national Effie for marketing effectiveness and a Clio for excellent creativity.

15 years ago, McEachern struck out on his own. With a dream and a dollar, he launched North Star Destination Strategies, specializing in brand marketing and research for places. More than 200 nationwide cities later, McEachern has become the recognized expert in the exploding field of place branding and destination research. With a process that combines education, research, strategy, creativity and action, he has helped create unique and effective brands for the states of Mississippi and Florida; major downtowns including New Orleans and Memphis and big-name cities like Jacksonville, Florida; Dayton, Ohio and Providence, Rhode Island. That same process and passion has also been applied to small cities that will soon be household names such as Petersburg, Alaska, Sebastopol, California and Warrensburg, Missouri.

McEachern is also a sought-after speaker on the topic of research and place branding. He has spoken at national, regional and local conferences; served as keynote speaker, panel moderator, session leader and break-out facilitator. He has helped CVBs, mayors, city councils, governors, city managers, economic development organizations and chambers.

McEachern lives on a horse farm in Nashville, Tennessee, where he rides horses, paddles kayaks and plays tennis with his children. As of yet, no member of his family has been branded.

ED BARLOW**Senior Vice President, Director of Strategic Planning**

Ed loves a good riddle. Ever since being the fastest to find the toaster in the tree in his pediatric dentist's waiting room, he has been solving marketing and operational challenges with creative and strategic instincts. Along the way he has collected a cum laude business degree in Hospitality Administration from Florida State University and a Master's degree in Creative Writing and English Literature from Southern Methodist University in Dallas.

Most recently, Ed gained valuable experience on both the client and agency sides of the branding relationship as an ADDY-award-winning Director of Marketing and Communications for the parent corporation to a group of national facility services companies serving transportation, travel, aviation, retail, healthcare, and hospitality industries. He has also worked as Senior Copywriter and Marketing Strategist for a branding design firm in Nashville specializing in persuasive content for Music Row, corporate, and nonprofit clients. His success can be traced to intense curiosity, ability to listen intently, and all those questions that lead to solving any riddle.

Ed caters to North Star clients with creativity, effective communication and customer service. His insights and instincts lead clients to a broad, inclusive approach to successful community place branding for the long-term. He has led successful community place branding initiatives for Iowa's Creative Corridor; Lima/Allen County, Ohio; Lauderdale Lakes, Florida; Brookings, South Dakota; Jamestown, New York; Helena- West Helena, Arkansas; Downtown New Orleans, Louisiana; State of Mississippi; State of Florida; Goshen, Indiana and Tehachapi, California.

After living off the grid for several years in Taos, New Mexico, enjoying hiking, mountain biking, and discovering some artistic talent, Ed returned to his native Tennessee. Back home he launched 2 eds design, a small enterprise with Ed Sr. specializing in creating home furnishings and custom artwork in wood and metal.

ANTHONY DOMINE**Vice President, Director of Marketing and Research**

Astronaut, Athlete, Artist, these are some of the answers you will normally find on second grader's response to "What do you want to be when you grow up?" Anthony Domine's answer... Commercial Director. As long as he can remember, Anthony Domine has had a passion for marketing, branding, research, advertising and design. His insatiable curiosity fanned the flame into the pursuit of working with startups, agencies, nonprofits, artists, authors and healthcare tech firms to uncover what makes them unique and communicate that to the world.

The vast majority of his career, however, has been set to applying that passion to becoming an industry expert in and relentless student of place branding and research. All of which began after a three-month internship in the research department, during which Anthony recreated core processes for analysis on everything from qualitative perception studies to North Star's Target Market Solar System. Anthony has a deep understanding and passion for data, and its critical role in connecting consumer behavior and perceptions with marketing strategy. Since his start at North Star he has empowered hundreds of community leaders with a detailed understanding of branding and become the head of all North Star communications and research. Anthony has also shaped the branding efforts for numerous places including the State of Mississippi; Rancho Cordova, California; Hickory, North Carolina; Miami County, Ohio; Lake Havasu City, Arizona and many others. Anthony Domine has a marketing degree from Belmont University where he received Lambert Award for Outstanding Achievements in Marketing. He is smart, organized, creative, curious, funny, compassionate and a really good musician.

DAVI SPRENKEL**Local Government Strategist**

An experienced public sector communications professional, Davi brings more than 27 years of high-level strategic thinking and planning to the North Star team. Davi's early experience involved editing and publishing a variety of communications including Tucson Magazine, Tucson Homes and Tucson Dining. From there she became the first public information officer (PIO) for Cobb County Parks and Recreation and was quickly promoted to PIO for the entire county, another first in that position. In that capacity, she created and managed a marketing/communications program for a county with a population of 550,000 and an annual budget of \$480 million. Davi directed the strategic communications rollout for the county's first 911 emergency system and the first public transportation system. She also directed successful communications programs for a variety of political campaigns and public referenda, including the County's first local option sales tax referendum for road improvements.

For her work, Davi received the "Award of Excellence" from the National Association of County Information Officers and a County Achievement Award from the National Association of Counties. Most recently, Davi completed International Economic Development Council coursework and continues to provide strategic marketing and communications services for a variety of public and private sector clients. Davi has a BA in psychology from Whitman College in Walla Walla, Washington and a Certificate of Public Management from the University of Georgia.

CHRISTI MCEACHERN

Executive Creative Director

For more than 20 years, Christi McEachern has made her mark as a marketing writer, editor and strategic planner. Her primary areas of emphasis include economic development, healthcare, travel and tourism, and community place branding. Prior to joining North Star in 2003, Christi worked with a wide variety of clients including Days Inn, Ramada, American Express, UPS, UPS Worldwide Logistics, Cellular One, AmSouth, Parisian, BellSouth Business Systems, the Arthritis Foundation, Blue Cross and Blue Shield of Georgia, HealthNet, TennCare, Physicians' Mutual, HCA, Matria Healthcare, Schering-Plough and Merck. She has received numerous awards for writing and editing. A 10-year North Star veteran, Christi's writing, strategic and client management skills are now put to good use. In addition to overseeing the care and nurturing of clients, Christi applies her keen creative eye to the development of creative and strategic direction for community place branding projects. A long-time business and marketing writer, she is also considered the "voice of North Star." This includes tasks such as writing the website, bi weekly marketing blasts, blog, branding articles, public relations and more. She oversees and manages every step of the North Star creative process and has spearheaded the creative development of numerous projects including Lee's Summit, Missouri; Georgia's Golden Isles; Newark, New Jersey; Iowa's Creative Corridor, Fargo, North Dakota, New Rochelle, New York and Snohomish County, Washington.

S.A. HABIB

Co-Creative Director

As long as he can remember, Habib has had an eye for design and beauty and a passion for creating things that connect emotionally with the consumer. Born and raised in Pakistan, as a youth Habib participated with his family creatively in their textile business, designing fabrics and finishes for the material they manufactured. Since moving to the United States, Habib has quietly taken the creative world by storm as a student, teacher, creative director and business owner. At the creative helm of the agency The Buntin Group he worked on accounts ranging from healthcare to tourism to retail. In 1998, he founded his own creative agency, Locomotion Creative, which continues to build brands that win awards. This includes winning the "Silver Medal," the highest achievement award of the American Advertising Federation in 2008. His account credits include the Greenbrier Resort, Captain D's, Georgia Boot, Century Boats, The Little Clinic, Pinnacle Financial Partners, Lee Jeans, Wrangler, Nautica and Red Kap, Tractor Supply, Kroger Food Stores and Dollar General. North Star, Habib shares with our community clients his knack for compelling creative execution based upon sound strategy and pragmatism. He leads a brilliant team including web designers, graphic designers, artists, photographers, video production gurus and illustrators. He helped create some of North Star's most compelling brands including Columbus, Georgia, the agency's first-ever community-wide brand.

TED NELSON

Co-Creative Director

Ted's 22-year career in marketing began under the watchful eyes of several industry legends from both Madison Avenue and Boston. He quickly rose through the creative ranks at respected agencies such as Hill Holiday; Arnold; Earl Palmer Brown and WestWayne. Along the way he amassed over 200 awards for marketing effectiveness, media innovation and creative excellence.

Ted's strategic abilities (and demand) ultimately led him to broaden his skill set, which now includes digital brand strategies, channel integration and performance metrics.

Ted's experience in place branding includes many Fortune 500 marketers, particularly in the travel/tourism and hospitality space. They include The Travel Channel, Delta Airlines, US Air, Royal Majesty Cruise Line, Hyatt Hotels, Wild Dunes Resort, SC, USAir, Pinellas County, FL, The Ritz Carlton, Orient Express, Marriott, Fairfield Inn, Twelve Hotels and Residences, Maine Tourism, FLorida Tourism, South Carolina Tourism, Georgia Tourism and Economic Development, The Islands of the Bahamas, Tryall Jamaica, and Georgia State Parks.

JAMES DUNCAN

Co-Creative Director

A vegetarian who loves Reuben sandwiches. An easy going guy whose favorite sport is Roller Derby. A Star Wars fan who likes Vulcans... you can't really put James in a category. And it is the same with his over 25 year advertising life. From cookies and cupcakes to banks and ballets. Seminars and salons to truck stops and tires, James has a variety of industry experience under his size 32 belt.

Since 1990 James has worked in several large and small agencies in the Nashville area including The Buntin Group, DVL, Gish Sherwood and Friends, and Creative Works to name a few. In 2001 he started his own creative shop with a focus on smart design and effective branding. Every creative person says that is what they do but most have visions of shiny awards or pats on their back from their industry peers... not James. His goal is to make well- thought-out marketing and design decisions so his client's products will sell, which will allow them to live in a big, fancy house; drive really cool cars, and take awesome vacations. He will also work even harder on your project if ice cream is involved.

