



## EXHIBIT 1

### PROJECT METHODOLOGY

#### Phase I: Market Research + Brand Strategy

Key Staff: Sam Preston, Roberto Muñoz, Angela Brangaccio, Robin Shattler, Will Ketchum

#### Stakeholder Education

**Educational Presentation:** We give a live presentation to your stakeholders groups for purposes of educating and furthering buy-in of community branding. This presentation can also be given in a public 'town hall' forum to engage the community in the process and to gather initial feedback from the public regarding opportunities to rebrand.

**Community Engagement Website/Brand Story Site:** This site serves as an online tool to direct traffic of San Marcos residents and stakeholders interested in learning more about the project, getting involved in the research stage, or becoming a Brand Ambassador after the launch of the new brand. Here is an example of a live educational site for Johnson City, TN: [brandjc.com](http://brandjc.com)

#### Research

**Situation Analysis:** This establishes the current lay of the land. We administer an online questionnaire to each of your key internal organizations.

**Research, Planning, Communications, + Media Audit:** We conduct a comprehensive review of previous studies conducted by the City and planning documents. In addition, we review and analyze marketing materials, branding, logos, social media, messaging, and recent press.

**Site Visit + Familiarization Tour:** Members of the North Star team will spend the better part of a week in San Marcos conducting research. An important part of this trip is a FAM tour, with an itinerary determined by your team.

**Key Stakeholder Interviews + Focus Groups:** With the assistance of your project team, we want to identify and speak to key stakeholders about San Marcos during our site visit.

**Online Community Survey:** We use some of the themes identified in the interviews and focus groups to craft a quantitative survey posted online for community-wide participation. We promote this survey using traditional and social media.

**External Perception Study:** North Star conducts phone interviews with professionals outside of San Marcos to uncover contextual perspectives. In collaboration with the San Marcos project team, we compile a list of 20 identified potential interviewees from nearby communities.

**Consumer Awareness + Perception Study:** For even more data-driven insights, this survey is conducted using a statistically significant random sampling of consumers and non-consumers in two outside markets using research panels. Data will be cross-tabulated in a number of ways to reveal the most insightful patterns between consumer and non-consumer groups.

**Competitive Positioning Review:** We provide a brand messaging and marketing strategy analysis to evaluate San Marcos' position relative to the competition in the area. This review ranks each competitor based on their brand strength, economic development focus, and tourism focus.

#### Insights + Strategy

**Situation Brief + Insight Development:** Data on its face has limited value, but the connections between data points open up understanding and opportunity. The entire North Star team weaves together these connections into a compelling set of insights that start to tell San Marcos' story.

**DNA Definition (Brand Positioning Statement):** Based on those insights, a guiding statement for the management and development of your brand is created. This definition should serve as the touch point for all San Marcos activity moving forward. It will help bring consistency across the brand. Included in your DNA Definition is:



**Research and Strategy Presentation + Report:** This represents a critical juncture in the project. We prepare a comprehensive review of all relevant research, insights, and recommended DNA Definition. We review the qualitative and quantitative analyses of San Marcos' current image and positioning. DNA Definition approval is required before proceeding.

## Phase II: Creative

**Key Staff:** Sam Preston, Patrick Golden, Anita Carter, Amy Samson, Haley Yacavone, Jordan Flippin

### Creativity

**Creative Committee Workshop:** A collaborative, interactive meeting between the North Star team and the San Marcos creative committee will explore the roles of different creative elements and identify creative preferences.

**Community Creative Workshop:** In addition, we would like to hold a 1 ½ hour public workshop session to allow interested residents to hear about the process and provide their input. North Star will start the session with the educational PowerPoint and then encourage attendees to provide their answers to various city character question prompts.

**Straplines + Rationale (5):** A strapline (tagline) is not the be-all and end-all for your brand, but it is the start of the story. North Star will provide a minimum of five different straplines, along with rationale for the strengths of each line. We will conduct trademark searches and Google searches to make sure there is basic clearance for each line presented. Upon selection, your legal team is required to conduct a more thorough search to ensure its availability, potentially securing a trademark if desired and avoiding any conflicts once in the market.

**Logos (5):** We will present a minimum of five logo options for the City of San Marcos that represent a variety of concepts and provide a round of revisions to your selected logo. Once selected, we will provide a variety of lockups and one-color options of the logo.

**Color Palettes (2):** Once your logo decision is made, we open up the possibilities visually by allowing you to select between two distinct color palettes.

**Brand Narrative:** The narrative defines your personality and 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 brand is dispersed.

**Looks (2):** We craft 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, detailing, and copy points. We will also provide a round of revisions for the look of your choice to ensure it reflects your exacting standards. The Creative Committee will select one look, and it will be applied to all subsequent deliverables.

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

**Custom Deliverables (8-10):** We will work with you to identify a list of 8-10 custom deliverables that show your logo on conceptual designs in the real world. The production of associated materials remains outside of this scope—the deliverables are visual examples. Options include, but are not limited to:

Social Media Graphics • Templates (Email Signature, Presentation, Newsletter, etc.)  
Business Cards • Letterhead • Envelopes • Brochures • Building + Monument Signage • Vehicle Wraps  
Print and Electronic Advertising Merchandise (Apparel, Accessories, etc.) • Built Environment Applications

## Phase III: Action + Implementation



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Key Staff: Sam Preston, Angela Brangaccio, Tyler Holder, Will Ketchum

### Implementation

**Community Communication + Rollout Guidance:** North Star will prescribe a community rollout plan that details the brand and campaign to all interested stakeholders and residents so that they can see, understand, and embrace it before the wider marketplace launch.

**Brand Action Ideas:** These are both high-impact, custom ideas (up to 8) designed to raise the profile of the new San Marcos brand and bring it to life in your community and foundational brand launch/implementation ideas and activities. Additional ideas may be accessible via a best practices knowledge-sharing database that North Star developed.

**Comprehensive 3-Year Marketing Strategy:** Our scope will also include forming the marketing action plan for San Marcos to go to market with—inspired by your brand strategy. North Star will develop a comprehensive marketing strategy following this general framework:

- Targets, Objectives, Strategy
- Campaign theme (often related but different than your brand theme)
- Core tactical recommendations and timing sequence
- Paid media strategy and pricing
- PR, social media, and content recommendations
- Budget allocation
- Measurement and tracking approach

**Final Report + Presentation:** We compile your brand into a final presentation that summarizes the research, creative development, and action plan. We leave time for discussion to ensure understanding, buy-in, and a clean beginning to the implementation of your brand, and we will work with your team to schedule one-on-one meetings with Councilmembers and stakeholders.



## ABILITY TO MEET DEADLINES

Getting Started Call	Week 1
<u>Phase I</u>	
<b>Market Research + Brand Strategy</b>	
Situation Analysis	Weeks 1 - 2
Research + Planning Audit	Weeks 1 - 2
Communication + Media Audit	Weeks 1 - 2
Community Engagement Website	Weeks 1 - 2
In-Market (Tour, Focus Groups, Interviews)	TBD
Online Community Survey + Brand Barometer	Weeks 4 - 8
External Perception Study	Weeks 6 - 10
Consumer Awareness + Perception Survey	Weeks 8 - 10
Competitive Positioning Review	Weeks 8 - 10
Situation Brief + Insight Development	Week 11
DNA Definition Development	Weeks 11 - 13
Research + Strategy Presentation	Week 14
<u>Phase II</u>	
<b>Creative</b>	
Creative Brief Development (Internal)	Week 15
Creative Workshop/Community Workshop	Week 15
Foundational Creative Development	Weeks 16 - 20
Custom Deliverable Development	Weeks 21 - 25
<u>Phase III</u>	
<b>Action + Implementation</b>	
Community Communication + Rollout Guidance	Weeks 26 - 30
Brand Action Ideas	Weeks 26 - 30
Final Report + Presentation	Weeks 31 - 32

### Proposed Timeline

**32 Weeks**

*Timeline is dependent upon an efficient client approval process, which requires that data and feedback from the client is received at key milestones. If the client approval and consensus process takes longer than 36 weeks, North Star will invoice any remaining contracted amount at that time and reserves the right to propose project extension fees at a blended hourly rate.*