



VISIT MORGAN HILL

DRAFT FY 23-24 Annual Workplan

July 1, 2023 – June 30, 2024

Confidential

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VISIT
MORGAN HILL

ANNUAL WORKPLAN FY 2023-2024

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VISION & MISSION

Vision: Recognition of Morgan Hill as a dynamic destination and a thriving local tourism economy

Mission: Position Morgan Hill as a vibrant leisure, sports, and events destination and be a catalyst for local tourism benefit through overnight stays

FUNCTIONAL AREAS / DISCIPLINES

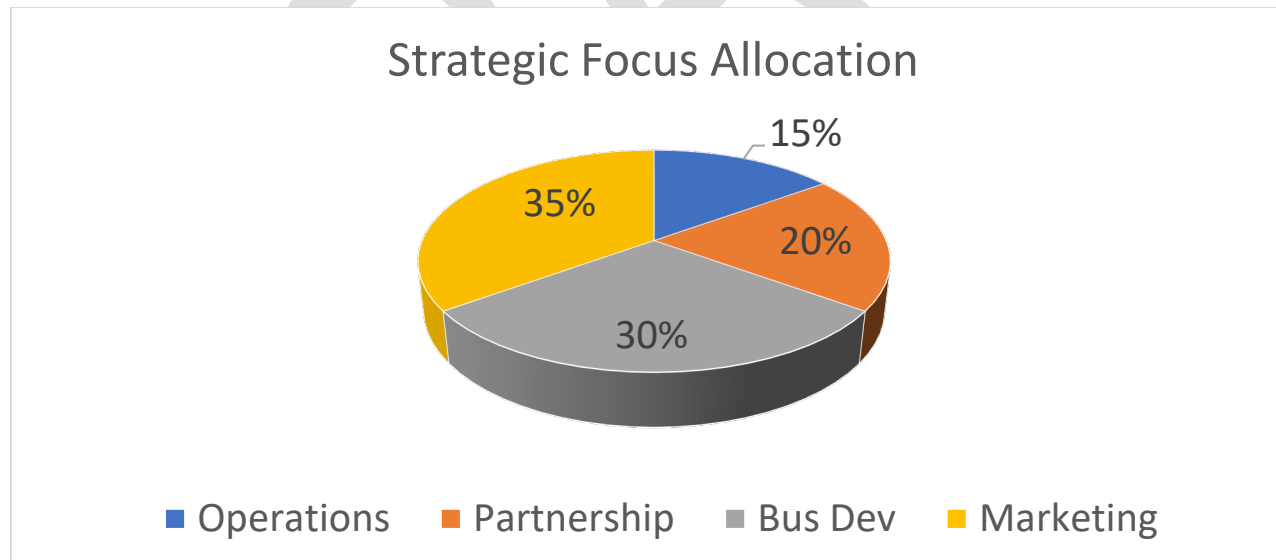
Visit Morgan Hill's work is structured into 4 functional areas, allocated in accordance with the MHTBID District Management Plan:

Operations & Administration – 15%

Marketing & Communications – 35%

Business Development – 30%

Product Development & Partnership – 20%

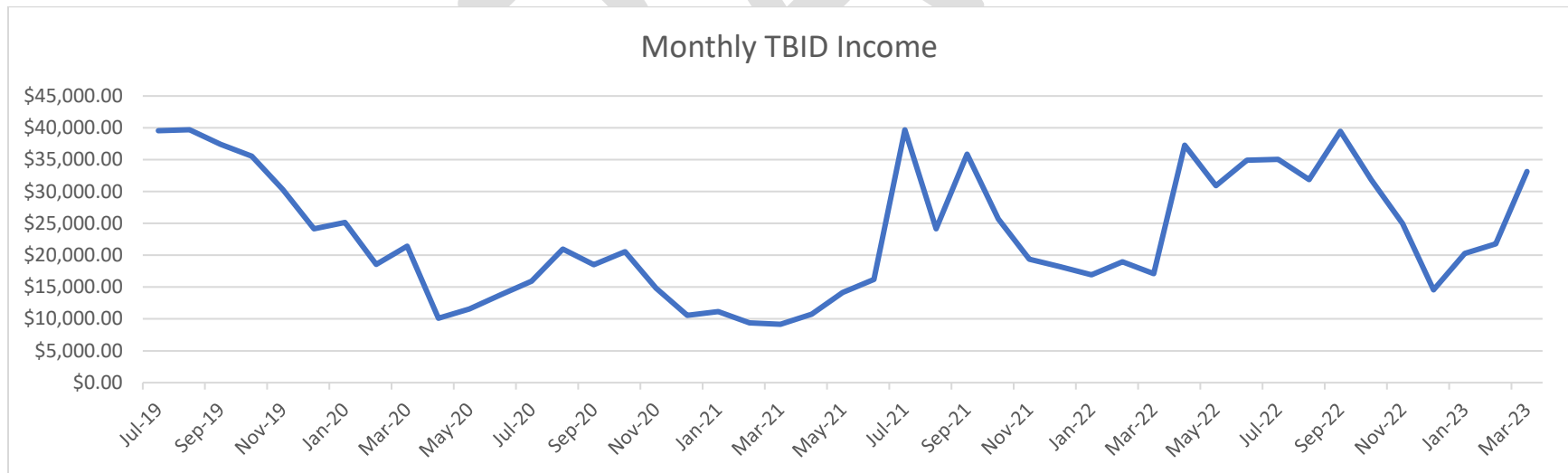


STRATEGIC PRIORITIES

This fiscal year, Visit Morgan Hill (VMH) has several important initiatives within the Administrative, Operations, and Partnership scope. The Morgan Hill Tourism Business Improvement District (MHTBID) renewal process must be completed to continue a new uninterrupted term after Feb 2024. VMH is also due to host an in-person Symposium for the local tourism industry, which is a key engagement and partnership effort. Introducing new data, metrics, and reporting will also increase the time and resources spent in this area. In terms of Marketing and Business Development, Morgan Hill's greatest hotel market needs are shoulder and winter season business (see chart below). Developing markets that complement our existing venues and seasonality while meeting the aspiration of our strategic priorities shall be a guiding principle. The subsequent budget and work plan take these factors into account and is intended to be a guide versus a checklist for the internal operation of Visit Morgan Hill.

Please see the complete assessment of our three primary strategic priorities in the attached SUPPLEMENT.

- 1) Leisure Travel Market Development
- 2) Group Travel Market Development
- 3) Public Events & Product Development



BUDGET

To be approved by Visit Morgan Hill Board 2023.

VMH FY 23-24 Expense Budget		
\$208,200.00	Operations & Administrative	
\$160,700.00	General	payroll, allowance, fees, insurance, accounting
\$5,000.00	Softwares Systems	office, computer, email marketing, design, zoom, etc.
\$2,500.00	Office Supplies/Misc	mailing, posting, TBID ads, etc.
\$10,000.00	Data Subscriptions	data sources, reporting, etc.
\$30,000.00	TBID Renewal	CIVITAS agency services
\$121,800.00	Marketing Communications	
\$80,000.00	Agency Fees & Campaign	PR and social media services retainer plus hosting expenses
\$27,000.00	Tourism Advertising	select targeted tourism marketing
\$14,800.00	Content Development	production of video, photography, design, brochure distribution
\$40,000.00	Business Development & Industry	
\$15,000.00	Strategic Market Development	trade show, conference, direct sales, contractor, data, collateral
\$5,000.00	Hosting Clients	in market client tour expenses and lead development
\$20,000.00	Sponsorship	new business opportunity sponsorship or facility enhancement
\$10,000.00	Industry & Community Relations	
-\$20,000.00	Symposium (20K roll over)	venue rental, food & bev, planning services, etc.
\$10,000.00	Local & Regional Partnership	partner meetings, luncheons, workshops, select sponsorship
\$380,000.00	TOTAL Projected	

Executive Director Spending Authority *(established June 2022)*

Executive Director is authorized to make purchase decisions within the approved budget, with the following conditions:

- a) Executive Director to seek quotes on Agency Fees & Campaign Media and Content services. For contracts valued at \$30,000 or above, Director will implement an RFP process for agency selection and require Secretary approval on agreements.
- b) Executive Director is authorized to execute advertising/marketing buys <\$10,000 and within the approved Advertising & Paid Media budget. The Director may seek board input and feedback as needed.

WORK PLAN

OPERATIONS & ADMINISTRATIVE – 15%

Operations and administrative work are essential to the sustainable and fiscally sound functioning of VMH. Work is executed by 1 full time employee, except for contracted support for taxes and special projects. Organizational operations often take precedence over other tasks to meet deadlines and honor VMH’s District Management Plan (State Streets & Highways Code). Operations tasks are critical to benchmarking VMH’s successes and opportunities through metrics that are communicable to stakeholders and community organizations. This year, VMH is tasked with the significant project of MHTBID renewal to continue operation past February 2024.

Operations & Administrative Focus Areas

- Monthly and Annual Financials, Accounting, & Tax Filing
- Hybrid Board Meeting Administration
- IT, Software, and Office Management
- Annual Insurance Renewals
- Monthly, Bi-Annual, and Annual Data Reporting
- Monthly Executive Director Report
- Annual Report (District Management Plan)
- Annual Work Plan and Budgeting
- **Attend Professional Development/Industry Conference** – CalTravel, Visit CA Outlook, or DMA West Leadership
- Monthly “Standup” Status Meeting with select VMH Board Members
- **MHTBID Renewal Strategy**
 - Work with agency to conduct successful renewal process including vision and strategy for new term, series of stakeholder engagement and presentation meetings, petition administration, and all required notices, filings, hearings.
- **Market Analysis**
 - Leverage existing data sources for annual report showcasing tourism stats, trends, and market intel. Secure new data sources as needed.

MARKETING COMMUNICATIONS – 35%

Marketing Communications efforts focus on owned, earned, and paid opportunities to build awareness of Morgan Hill in our TARGET MARKETS of leisure travel (wine, food, agriculture, and outdoors) and STRATEGIC MARKETS of group travel (sports, private events, small meetings, and travel trade). We will continue in-house content development and management of our agency's earned media public relations work and select owned channel social media campaigns. Maintaining a fresh and updated website, blog, newsletter, and visual assets keeps Morgan Hill "discoverable," builds awareness, and provides path to booking. We have a modest but impactful budget for advertising, with a strong selection strategy.

Marketing & Communications Focus Areas

- Continue ongoing owned content and channel development – website, social media, newsletters, SEO
 - Researching, copywriting, designing, and publishing content
 - Coordinating, capturing, storing, transferring, and editing photography and videography
 - Concepting, crafting, editing, uploading visual assets and copy into final posts, stories, reels, galleries, etc.
- Day to day management of marketing agency services, including public relations and social media strategy and execution
- Continue pitching MH assets and news to travel media and hosting journalists for editorial placement in travel publications
- Leverage quarterly, seasonal themed consumer e-newsletters and blogs (4 per year)
- Continue in-house and agency-managed social media management, timely campaigns/boosts, and influencer partnerships
 - Strive for high quality photo and video content that drives sustainable growth and high engagement
- Continually research and implement advertising that aligns with market targeting, budget, and desired ROI
- Leverage regional destination partnerships for augmented destination awareness and cooperative marketing efforts with Visit California and other DMOs)

BUSINESS DEVELOPMENT – 30%

Business development focuses on generating group leads/RFPs for hotels and venues. This includes, but is not limited to, sports tournaments and private group events. RFP generation requires sales tactics such as collateral material development, prospecting, relationship building, pitching, buyer-supplier trade shows, and occasional sponsorship. In addition to traditional sports and wedding groups, Morgan Hill has market potential with the travel trade market and small corporate events. These markets are also supported by brand awareness marketing, but specific advertising to potential lead sources is a fragmented and ineffective use of funds.

Business Development Focus Areas

- Refine market specific pitch materials and content and continue to distribute amongst strategic group markets & partners
- Utilize creative tactics for tournaments and privately managed events in sports, culinary, wine, agriculture, entertainment spaces
- Maintain and develop sports partners like Panthers IFL, SJSA, and Team San Jose to generate new leads
- Continue RFP/lead/new business opportunity generation and distribution to local hotels & venues
- Leverage the CVENT lead platform for optional RFPs fitting Morgan Hill
- Provide sponsorship or bid support on qualifying events
- Tourism Standup Meetings
 - Quarterly meetings with revenue facing hoteliers for ongoing market intel to be applied to marketing and business development efforts and to increase the awareness of and access to the breadth of visitor information resources VMH produces.
- Attend one business development networking/trade show event if feasible (budget, time, lead generation ROI)
- Work to establish wholesale FIT and group contract opportunities for hotels through direct sales or tradeshow
 - Go West Summit Feb 26-29, 2024 in Lake Tahoe
 - US Travel's IPW on May 3-7, 2024 in Los Angeles

PARTNERSHIP & PRODUCT DEVELOPMENT – 20%

VMH is an established partner with key local organizations and the City of Morgan Hill. We extend the marketing reach of local events, activities and attractions. Partnerships are carefully considered, strategically developed, and engaged with the objective of furthering VMH's mission. Local partnerships to be leveraged for organizational awareness and visitor product development/enhancement opportunities: Hotel and Tourism Business Stakeholders (restaurant, winery, retail, sport facility, event venues); Business and Community Organizations; Local Event Organizers; City & County Government. Also partner on a regional level to support greater tourism industry opportunities for Morgan Hill.

Product Development & Partnership Focus Areas

- Regularly attend local partner and event organizer meetings
- Maintain up to date visitor calendar and promotional marketing partnerships.
- Continue partnerships for new and reimagined, overnight stay-driving local festivals/events and products. Leverage ad hoc local committees as needed.
- Promote hotels alongside major events & outline “Weekend in Morgan Hill” itineraries in marketing
- Seek opportunities to support local Sports Facility enhancement and improvement
- Support and engagement in local tourism advocacy in business and government space, private tourism business development
- Serve on Visit California’s Regional Strategic Tourism Planning Advisory Committee
- Host Annual Tourism Symposium with an educational topic component
 - Targeting late September/early October event, conduct all coordination, planning, venue selection, invitations, materials, program concepts, speakers, panels, and miscellaneous tasks

METRICS

OPERATIONS & ADMINISTRATIVE

- **Completion of MHTBID Renewal**
 - Metric is completion. The goal is to collectively agree upon the best possible parameters and not incentivize any particular result other than the TBID continuing.
- **Completion of Marketing Analysis Document**
 - Metric is the completion and distribution of the report. There are outstanding questions on specific content/data, which can provide additional checks for completion.
- *Attend a Professional Development/Industry Conference*
- Host Tourism Symposium
- Completion of Annual Report
- Completion of Monthly ED Report
- Conduct Board Meetings, Accounting, Taxes, Insurance Renewals

MARKETING COMMUNICATIONS

- Annual Website Visitors/Unique Visitors/Pageviews and YOY
- Annual Outbound Click Traffic to Partners and YOY
- Annual Traffic from Social Media YOY
- Annual Traffic from Referral Sites YOY
- Individual Campaign Metrics – Impressions, Click Through Rate
- Email Newsletter Subscribers, Open Rate, Click Through Rate YOY
- Number of Journalists & Influencers Hosted in MH
- Number of PR Submissions (*including at least 1 per new significant tourism opening*)
- Number of PR Articles Secured (+ estimate circulation total)
- Number of Blogs Published (*including at least 1 per new significant tourism opening*)
- *Social Media Followers Across Platforms YOY*
- *Social Media Engagement Rate Above Industry Standard*
- Distribution of VMH Brochure

BUSINESS DEVELOPMENT

- Number of Leads/RFPs and Room Nights represented
- Number of General Inquiries/Requests
- Secured Events/Leads
- *Conduct 4 Hotelier meetings within 12 months*

PARTNERSHIP

- Meetings Attended with Local Organizations, Business Groups, Event Organizers
- Special Projects, Role, and Result (will vary depending on nature of project)
 - i.e. Panthers Host Committee: marketing metrics, hotel rooms, field rental, event attendance, local business generated
 - i.e. Worked with X Organization on New Infrastructure project w/ Advocacy Letter

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