

REQUEST FOR PROPOSALS

Visit Morgan Hill Comprehensive Strategic Plan Development

Visit Morgan Hill invites the submittal of proposals for the development of a comprehensive strategic plan for Visit Morgan Hill.

Proposals are due by Thursday, June 20, 2019 at 5:00 PM.

If interviews are necessary, they will occur during the week of June 24, 2019 – June 28, 2019.

Proposals can be mailed to **1102 Corporate Way, Suite 140, Sacramento, CA 95831** or emailed to nfarley@civitasadvisors.com

You may confirm receipt of your proposal to ensure your documents were received, in advance of the deadline.

Late submittals will not be considered.

Point of Contact:

Nichole Farley

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Visit Morgan Hill (“VMH”) is seeking proposals from qualified firms or individuals to develop a comprehensive strategic plan for VMH. Firms and individuals with experience in facilitating organizational comprehensive strategic planning services are encouraged to apply.

Background

Morgan Hill is located within the southern part of Santa Clara County, 10 miles south of San Jose and 10 miles north of Gilroy. Morgan Hill is nestled between the Diablo Mountain Range and the Santa Cruz Mountains, and has a rich history of farming and manufacturing. While Morgan Hill resembles Silicon Valley in its business mix, rich entrepreneurial spirit and thirst for innovation, the city’s natural geography and open space make it a unique place.

The City is 13 square miles, home to approximately 44,000 residents and 1,200 businesses employing approximately 16,000 people. Over 47% of households in Morgan Hill earn over \$100,000 a year. Over 70% of all employed residents travel more than 20 miles to work each day.

Morgan Hill is best known for its superb quality of life with access to open space and abundant recreational amenities that give employees, visitors, and residents alike a unique place within Silicon Valley to live, work, and recreate. The City has made many thoughtful decisions and as a result is a leader in affordable housing production, open space preservation, water and agricultural land conservation, and environmental stewardship. Smart planning has resulted in state-of-the-art recreational facilities for residents and visitors, making Morgan Hill a sports/recreation destination. As a gateway to the Santa Clara Valley wine region, proximity to wineries, farms, cycling, golfing, swimming, and boating also make the area an ideal tourism destination. In recent years, the City has been developing a brand that promotes Morgan Hill as a healthy community with access to the outdoors and as a tourist destination. The recent success in the revitalization of Downtown is putting Morgan Hill on the map as a coveted neighborhood.

In addition to the superb quality of life and access to wineries, farms and open space, the City of Morgan Hill is looking to elevate and market itself as an excellent place for tourism. Recently, a Tourism Business Improvement District (TBID) was created to generate funds dedicated to Tourism. The City has sixteen lodging facilities that on March 1, 2019 began assessing a 1.5% Transient Occupancy Tax (TOT) toward a fund that will generate over \$400,000 annually to grow visitor and overnight stays. This TBID is managed by a mutual benefit nonprofit corporation called Visit Morgan Hill. The organization is in the process of finalizing formation documents, including seeking IRS determination as a Section 501(c)(6) tax-exempt organization.

About Visit Morgan Hill

The Visit Morgan Hill organization is made up of a nine-person board of directors. The Board meets on a monthly basis. Information about the organization and agendas a meeting minutes, the District Management Plan and the Board's Bylaws can be found at www.visitmorganhill.org. The main purpose of the VMH Board's efforts is to market and promote the area a desirable place for overnight visits. Most of the funds (81%) should be dedicated to Sales and Marketing and Sports Facility Promotion and Management.

Scope of Services:

The VMH Board is seeking a consultant to lead the board and staff through the process of developing a three (3)-year strategic plan. The plan will articulate VMH's vision and mission and include the goals, objectives and action steps that will guide the organization for the next three (3) years.

The work includes the following:

- Research of best practices for other Destination Management Organizations (DMOs) Strategic Plans
- General understanding of area's amenities and opportunities
- Outreach and engagement of key stakeholders (Santa Clara County Wineries Association, Downtown Association, Chamber of Commerce, Outdoor Sports Center Operator, City of Morgan Hill, event organizers, etc.)
- Development of an actionable Strategic Plan that includes an implementation schedule, implementation budget and necessary tools and resources.

Qualifications:

The proposal must describe the consultant's qualifications to conduct the RFP scope of work activities, expertise, knowledge, and experience. Respondents must have a experience in facilitating organizational comprehensive strategic planning services. Experience should include examples of conducting similar or related work, as well as working with non-profits or similar organizations. To accomplish the scope requested, the consultant will need to possess the following qualifications:

- Experience at successfully developing consensus-based strategic plans
- Knowledgeable of collective impact or collaborative strategic initiatives
- Strong facilitation skills
- Experience at creating a neutral environment for, and soliciting input from, individuals from various sectors
- Experience at gathering and utilizing data to inform the strategic planning process
- Knowledge of budgeting
- Experience with facilitating group meetings
- Knowledge of marketing, communications and branding
- Knowledge of resource development
- Experience inspiring others to think innovatively

Submittal Requirement:

- Proposal for execution of Strategic Plan that includes approach, estimated time (hours, days, events), other pertinent information and a summary of strategic planning experience
- Suggested project timeline with major tasks and milestones
- Detailed budget – Quote should include all costs associated with planning, researching, conducting, and writing related to the strategic planning process and event coordination. This includes staff time, travel, printing, and consultant fees.
- Resume(s) or bio(s). Education, position in firm, years and type of experience, continuing professional education, etc., will be considered.
- Two to three work samples of similar projects completed.

- Three relevant client references.
- Fifteen (15) pages maximum.
- Contact information, including website, if applicable

Deliverables:

The final deliverable should be five (5) printed copies and an electronic version of a three (3)-year Strategic Plan and present the final report at a Visit Morgan Hill Board meeting. The Strategic Plan must include an implementation schedule, an implementation budget and necessary tools and resources.

Due Date:

VMH reserves the right to accept, negotiate, reject, or propose amendment to any and all proposals submitted. The selection process will be determined based upon prior experience facilitating organizational comprehensive strategic planning services, experience in working with non-profit corporations, and knowledge of the City of Morgan Hill. VMH reserves the right to reject any and all applicants as well as to determine that a contract will not be awarded based on the proposals received.

The due date for receipt of all proposals is June 20, 2019 at 5:00 PM.

Proposals may be mailed to **1102 Corporate Way, Suite 140, Sacramento, CA 95831** or emailed to nfarley@civitasadvisors.com.

Schedule of Performance:

Work on this project is can begin as early as August 1, 2019. Potential meeting retreat could be held on August 26, 2019. Schedule is tentative.

Evaluation Criteria:

VMH will conduct a comprehensive, fair, and impartial evaluation of all proposals received in response to this RFP. Each proposal will be analyzed to determine overall responsiveness and qualifications under the RFP. The VMH Board of Directors may select all, some, or none of the respondents for interviews and/or a site visit. The VMH Board of Directors may also request additional information from respondents at any time prior to final approval of a selected respondent.

Award of Employment Contract and Reservation of Rights:

VMH reserves the right to award one, more than one, or no contract in response to this RFP. The contract, if awarded, will be awarded to the respondent(s) whose submittal(s) is deemed most advantageous to VMH, as determined by the VMH Board of Directors. VMH reserves the right to accept one or more proposals or reject any or all proposals received in response to this RFP. VMH also reserves the right to terminate this RFP, and reissue a subsequent solicitation, and/or remedy technical errors in the RFP process. VMH will require the selected respondent(s) to execute a contract with VMH. No work shall commence until VMH signs the contract document(s). In the event the parties cannot negotiate and execute a contract within the time specified, VMH reserves the right to terminate negotiations with the selected respondent and commence negotiations with another respondent. This RFP does not commit VMH to enter into a contract, award any services related to this RFQ, nor does it obligate VMH to pay any costs incurred in preparation or submission of a proposal or in anticipation of a contract. If selected, respondent will be required to comply with insurance and indemnification requirements prior to the execution of a contract. Respondent agrees and understands that, if selected, respondent and all persons designated by respondent to provide services in connection with a contract, is (are) and shall be deemed to be an independent contractor, responsible for respondent's acts or omissions, and that VMH shall in no way be responsible for respondent's actions, and that none of the parties hereto will have authority to bind the others or to hold out to third parties, that they have such authority.