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Strategic Planning Steering Committee

October 1st, 2008

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The Steering Committee

- Rob Beall, Chair
- Joe Barbera
- Phil Bowers
- Jim Breuer
- Eric King
- Jordan Naftal
- Henry Pertman
- Craig Sigismondi



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Getting us to where we don't yet know
where we are going...

...and using data to get us there.



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Ten Reasons for Strategic Planning

- Development of a Road Map for the Organization, get everyone heading in the same direction.
- Input to the President and Exec. Committee, help set goals, committee charges.
- To achieve the Mission
- To solve problems and assess opportunities in the industry or profession.
- Reality Check....where are we, where are we going?
- Focus everyone in the organization.
- Ownership, buy-in, and consensus.
- To build team work among the board and staff. (Let others see the teamwork)
- To make course corrections --- OK to do.
- Leadership assessment....roles of leaders and committees delineated.
- To inventory resource of time and funding.
- To act as visionaries, future thinking.
- To have a game plan as to what needs to be done next, a check off list as what has been completed, and a year-end score card.
- Public Relations tool for members, allies, press, etc. Shows how good you can be.

Strategic Planning Process *(90 Days Start to Finish)*

Before

(Pre-Planning)

Phase I - 60 Days

Determine Need for Plan

Select Date - Timeframe

Select Site - Retreat

Select Facilitator

Capacity Analysis*

Select Participants

Conduct SWOT - Survey

Analyze Survey Results

Possible Task Force Appointed



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Strategic Planning Process

(90 Days Start to Finish)

During

(On-Site)

Phase II - 1/2 - 2 Days

Set the Scene - Purpose
Report on Input Findings
Review Previous Goals
Affirm Mission Statement
Affirm Vision
Affirm Core Values
Discuss - Set Goals
Develop Strategies
Set Action Steps



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Strategic Planning Process *(90 Days Start to Finish)*

After

(Post-Planning)

Phase III - 30 Days

Circulate Draft

Adopt Officially

Promote Results

Appoint Plan Champion

Include on Agendas

Integrate

Budget

Committees

Staff Business-Action Plan

Marketing-Membership Plans



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Why do Strategic Plans Fail?

Lack of member input, representation.

Out of synch with trends and external influences.

Lack of buy in.

Lack of resources. (\$, volunteers, staff, committees, time.)

Too many goals.

No measurable goals, deadlines, accountability.

Little delegation.

No action steps – breakdown.

Sits on a shelf – ceremonial.

Crisis management takes over.



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What data/resources do we have?

- Existing association plan
- Plan from the National Restaurant Association
 - Survey
- Board Assessment
- 2007 RAM Member Survey
- Member and non-member restaurants
- Member and non-member allied/suppliers



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What questions do we need to ask?

- How do we integrate the work of the Foundation?
- How do we integrate Chapters?
- How much did we budget for this?
- How should we involve staff?
- Do we hire an outside facilitator?

- What are the three next steps?