



NEWPORT BEACH
RESTAURANT ASSOCIATION

Strategic Business Plan **2013/2014–2015/2016**



FINAL COPY

Plan Outline

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Executive Summary

This summary highlights the key components of the three year (2013/2014–2015/2016) Newport Beach Restaurant Association (NBRA) *Strategic Business Plan* which was prepared based on four workshop sessions attended by members of the 13 person Board of Directors and its marketing agency representative over the period of February to June 2013. In addition, an online survey of the NBRA Business Improvement District (BID) investors was conducted and provided some opinion indications and advice to the planning discussions. The NBRA is a uniquely formed not-for-profit and BID-funded cooperative marketing association that promotes the Newport Beach foodservices industry. The strategic plan has been compiled as a directional document for the ongoing effective governance and administration, priority activities determination and appropriate resource allocations of the NBRA BID in order to meet its challenges and to attain its future outcomes.

Main Challenges

We face four main challenges as a city restaurant and foodservices industry association.

1. To fully engage a cohesive BID investor group through a recognized value proposition committed to effective association communications, strong community foodservice events and influential education and advocacy activities.
2. To raise the overall awareness of the city restaurant and foodservice experiences through partner supported high profile events and resident/visitor programming.
3. To prepare and implement annually an integrated investor participative marketing and promotion plan with requisite targeted messaging, appropriate offline/online media selection and measurable results.
4. To achieve consistent direction and leadership through an agreed-to organization strategy, effective governance and investor dialogue and new productive partnerships.

Vision 2020

We aspire to be a foodservices association that is dependent on astute board leadership and efficient program implementation.

The Newport Beach Restaurant Association is a strong investor and community partner marketing group extolling the city's quality foodservice brand experience.

Mission, Values and Goals

We accomplish a focused foodservices association purpose through adherence to values and guiding principles and four long-term goals.

The Newport Beach Restaurant Association is a not-for-profit and BID-funded cooperative business group that leads the brand marketing of the city's restaurant and foodservice experience for the benefit of its investors, partners and community residents and visitors.

- Inclusive
- Collaborative
- Productive
- Strategic
- Accountable

Marketing and Promotion Goal

To enhance the city foodservices experience through targeted marketing strategies, event programming and operations and expected returns.

Investor Communications and Education Goal

To regularly communicate to investors and partners on NBRA promotional and educational activities.

Community and Stakeholder Relations Goal

To inform and influence key identified constituents on the value and importance of the city foodservices industry and NBRA activities.

Financial Resources and Administration Goal

To operate as a fiscally responsible organization with sustainable revenue flows and effective governance.

Value Proposition

We perform effectively by delivering on an association promise that is strategically based on driving new incremental customer demand to our BID foodservices investors.

The Newport Beach Restaurant Association leverages its core BID investment with higher returns from restaurant and foodservice special events, education and advocacy programming and brand marketing efforts.

Priority Initiatives

We implement the following 22 key activities to address the city restaurant and foodservices association challenges and realize its vision over the next three years. In 2013/2014, the focus of attention will be on seven key initiatives as follows: preparation and implementation of a targeted and measurable annual marketing strategy and plan with an aligned program of work and budget allocations; a new marketing and media partnerships investigation; the *Taste of Newport Beach* event ownership evaluation; an engaging investor outreach strategy and program execution; a targeted and measurable stakeholder communications plan; an association bylaws review with required changes; and an association marketing and administration RFP assessment in conjunction with the city.

Activities	2013/2014	2014/2015	2015/2016
Marketing and Promotion			
New marketing and media partnerships investigation	●	●	●
Enhanced website/social media engagement	●	●	●
Taste of Newport Beach event ownership evaluation	●		
Scope and magnitude of local event involvement	●		
NCAA/BCS Bowl participation role potential	●		
Targeted and measurable annual marketing strategy and plan	●	●	●
Investor Communications and Education			
Relevant educational program development based on investor needs	●	●	●
Engaging investor outreach strategy and program execution	●	●	●
Annual Meeting structural and contents review	●		
Ongoing calendar of events development	●	●	●
Community and Stakeholders Relations			
Top foodservice issues identification and advocacy	●	●	●
Allied membership investigation		●	
Clearinghouse setup for charitable causes	●	●	●
Targeted and measurable annual communications plan with appropriate messaging (city departments and other industry partners)	●	●	●
Financial Resources and Administration			
Updated rolling year strategic plan review	●	●	●
Aligned program of work and budget allocations	●	●	●
BID fee structure evaluation and approval	●	●	
City BID compliance documentation	●		
Association bylaws review with required changes	●		
Board governance restructuring (committees and/or task forces)	●		
Board manual development		●	
Association marketing and administration RFP assessment in conjunction with city	●		

Introduction

The Newport Beach Restaurant Association (NBRA) 13 member Board of Directors prepared the enclosed three year (2013/2014–2015/2016) *Strategic Business Plan* over the five month period of February to June 2013. It was based on four workshop sessions on February 20, April 10, May 2 and June 20, 2013 that also included the NBRA marketing agency representative and indicator opinion results from an online survey to the association's approximately 380 investors. These planning discussions focused primarily on association challenges, purpose, value proposition and current and future new initiatives.

For background understanding, the NBRA is a not-for-profit and business improvement district (BID) funded cooperative association formed in 1995 by the city of Newport Beach at the request of the local foodservices industry. Every foodservices establishment is annually assessed a mandatory levy by the city government with proceeds directly provided to the NBRA BID group for marketing purposes. Total budget over the past few years has been approximately at the \$200,000 level.

The purpose of the strategic plan is:

1. To gain a clear understanding of the NBRA BID organization marketing and stakeholder communications roles and new opportunities
2. To identify the accomplishments, current issues and main challenges relative to the NBRA
3. To formulate an engaging NBRA vision and revised mission and long-term goals
4. To determine an agreed-to NBRA value proposition with concrete investor benefits
5. To specify the priority initiatives to become a more influential community-based marketing agency.

The *Strategic Business Plan* has been compiled as a directional document for the ongoing effective governance and administration, priority activities determination and appropriate resource allocations of the NBRA BID in order to meet its challenges and to attain its future outcomes.

Details on the components of the strategic plan follow with its approval by the NBRA Board of Directors on July 25, 2013.

Newport Beach Restaurant Association Current Situation

Accomplishments

Based on the Board of Directors' meeting discussions and the online investor survey results, the key accomplishments of the NBRA over the past 15 years were determined to be the following five items (not in priority order nor exclusive):

- Innovative and consistent restaurant BID funding for the association since 1995/1996
- Influential quality promotional collateral, both online and offline
- Newport Beach Restaurant Week coordinating proponent since 2007
- Strong and well-leveraged cooperative partnership marketing program
- Successful growth of the Newport Beach Restaurant Week event.

Key Issues

Similarly, 12 top-of-mind issues were identified as affecting the marketing and management of the NBRA below (not in priority order nor exclusive):

- More active BID investor involvement
- Full BID category representation on the Board
- Recognized Association value proposition or investor promise
- city administrative role changes relative to BIDs
- Other sustainable funding opportunities
- Restaurant parking requirements policy vis-à-vis city ordinance
- Agreed-to strategic plan development and execution
- New partnerships and program sponsorship potential
- Visit Newport Beach marketing relationship
- Restaurant fulfillment/service publication needs
- Need to increase local resident awareness
- Sufficient marketing funds to cover all types of foodservice establishments.

SWOT Analysis and Conclusions

To add specifics to these issues, a SWOT (strengths-weaknesses-opportunities-threats) analysis was conducted from a NBRA organization leadership perspective. This analysis follows with conclusions.

<p>Strengths (present advantages)</p> <ul style="list-style-type: none"> ➤ Newport Beach high brand awareness ➤ Approximately 380 investor BID structure funding ➤ Good relationship with city government ➤ BID cooperative marketing program ➤ High quality independent restaurants ➤ Largest sector employer and sales tax revenue producer ➤ Newport Beach Restaurant Week proponent 	<p>Weaknesses (present disadvantages)</p> <ul style="list-style-type: none"> ➤ No long-term plan ➤ Insufficient funding based on expectations ➤ Inadequate parking around restaurants ➤ No BID investor group fringe benefits program ➤ High BID investor apathy ➤ Minimal BID investor communications
<p>Opportunities (potential advantages)</p> <ul style="list-style-type: none"> ➤ Focus on a stronger independent restaurant coop program ➤ Stronger relationship with city on parking/signage needs ➤ Taste of Newport Beach event management potential ➤ More revenue-generating sponsored events and projects ➤ Bulk-buying investor benefits ➤ Allied membership investment potential ➤ Appropriate roles with California Restaurant Association/OC chapter ➤ Strengthened restaurant and hotel relationships ➤ Visit Newport Beach partnership development 	<p>Threats (potential disadvantages)</p> <ul style="list-style-type: none"> ➤ Adjoining city foodservices competition ➤ No foodservice brand marketing/promotion ➤ Minimal city support ➤ Overbuilt restaurant/foodservices presence ➤ Small business and minimum wage poor perception

Given the SWOT analysis above, it was generally found that there was:

1. Strong Newport Beach restaurant/foodservice sector allied brand support and public recognition
2. Need for an agreed-to association strategic plan with priorities to allow for strengthened relationships with city, community marketing agencies and corporations
3. Excellent opportunity to own and affiliate with new revenue-generating projects (e.g., events, investor programming benefits, sponsorships)

4. Solid potential to become a more inclusive BID investor group with engaging stakeholder involvement.

Main Challenges

With the previous SWOT analysis and the various planning discussion sessions, it was agreed that the main challenges facing the NBRA are as follows.

1. To fully engage a cohesive BID investor group through a recognized value proposition committed to effective association communications, strong community foodservice events and influential education and advocacy activities.
2. To raise the overall awareness of the city restaurant and foodservice experiences through partner supported high profile events and resident/visitor programming.
3. To prepare and implement annually an integrated investor participative marketing and promotion plan with requisite targeted messaging, appropriate offline/online media selection and measurable results.
4. To achieve consistent direction and leadership through an agreed-to organization strategy, effective governance and investor dialogue and new productive partnerships.

Vision 2020

The following 2020 vision statement was formulated for the NBRA based on board advice which indicated solid support for increased foodservice sector and community leadership involvement.

The Newport Beach Restaurant Association is a strong BID investor and community partner marketing group extolling the city's quality foodservice brand experience.

In order to realize this vision, some of the main activities and policies to be enacted by the NBRA so it can be more relevant, visible and credible are:

- Enhanced foodservices sector brand marketing
- Increased communications of BID investor director benefits
- Strengthened community and industry partnerships with higher leveraged results
- Stronger selective communitywide foodservices event involvement and promotion.

Newport Beach Restaurant Association Purpose and Future Direction

Mission, Values and Brand Promise Commitment

A revised purpose statement, along with values and guiding principles, were prepared for the NBRA and are presented below.

The Newport Beach Restaurant Association is a not-for-profit and BID-funded cooperative business group that leads the brand marketing of the city's restaurant and foodservice experience for the benefit of its investors, partners and community residents and visitors.

The NBRA performs its mission effectively by adhering to the following five current and aspiring norms:

- Inclusive
- Collaborative
- Productive
- Strategic
- Accountable

In order to deliver on the mission, the NBRA recognized the need to clearly define its value proposition and specific promise benefits as follows.

The Newport Beach Restaurant Association leverages its core BID investment with higher returns from restaurant and foodservice special events, education and advocacy programming and brand marketing efforts.

Essentially, the NBRA exists to drive new incremental customer demand to its BID foodservice investors.

Strategic Goals

In concert with the mission statement, four long-term goals were developed. These goals will be further translated into initiatives with specific measurable program objectives.

Marketing and Promotion

To enhance the city foodservices experience through targeted marketing strategies, event programming and operations and expected returns.

Investor Communications and Education

To regularly communicate to investors and partners on NBRA promotional and educational activities.

Community and Stakeholder Relations

To inform and influence key identified constituents on the value and importance of the city foodservices industry and NBRA activities.

Financial Resources and Administration

To operate as a fiscally responsible organization with sustainable revenue flows and effective governance.

Critical Factors for Continued Success

The top important factors to consider in achieving increased success for the NBRA were identified as follows:

- New commitment to active industry and community leadership
- Stronger outreach to the BID investors
- Enhanced and clarified BID investor benefits
- Further attention to high profile restaurant and foodservice events
- Integrated marketing plan with more BID investor involvement in planning and execution.

Newport Beach Restaurant Association Strategic Outlook

Three Year Priority Initiatives

Over the next three years, the NBRA will focus full attention on the following, not in priority order, 22 key programming areas. In 2013/2014, the focus of attention will be on seven key initiatives as follows: preparation and implementation of a targeted and measurable annual marketing strategy and plan with an aligned program of work and budget allocations; a new marketing and media partnerships investigation; the *Taste of Newport Beach* event ownership evaluation; an engaging investor outreach strategy and program execution; a targeted and measurable stakeholder communications plan; an association bylaws review with required changes; and an association marketing and administration RFP assessment in conjunction with the city.

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Scope and magnitude of local event involvement	●		
NCAA/BCS Bowl participation role potential	●		
Targeted and measurable annual marketing strategy and plan	●	●	●
Investor Communications and Education			
Relevant educational program development based on investor needs	●	●	●
Engaging investor outreach strategy and program execution	●	●	●
Annual Meeting structural and contents review	●		
Ongoing calendar of events development	●	●	●
Community and Stakeholders Relations			
Top foodservice issues identification and advocacy	●	●	●
Allied membership investigation		●	
Clearinghouse setup for charitable causes	●	●	●
Targeted and measurable annual communications plan with appropriate messaging (city departments and other industry partners)	●	●	●
Financial Resources and Administration			
Updated rolling year strategic plan review	●	●	●
Aligned program of work and budget allocations	●	●	●
BID fee structure evaluation and approval	●	●	
City BID compliance documentation	●		
Association bylaws review with required changes	●		
Board governance restructuring (committees and/or task forces)	●		
Board manual development		●	

Association marketing and administration RFP assessment in conjunction with city	●		
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The *Strategic Destination Plan* is to be reviewed and updated on a yearly basis, and used in aligning and preparing the NBRA’s successive annual marketing and business plans, including key detailed programming and corresponding operating budgets.

Appendices

NBRA BID Board of Directors

- ☞ Jim Walker, President
- ☞ Sheri Drewry, Vice President
- ☞ Nicole Hay, Treasurer
- ☞ John Robinson, Secretary

- ☞ Jim Colombo, Member
- ☞ Eldy Galietta, Member
- ☞ Thomas Guilioni, Member
- ☞ Tony Motakef, Member
- ☞ Miguel Rodriguez, Member
- ☞ David Salisbury, Member
- ☞ Ronald Schwartz, Member
- ☞ Sam Tila, Member
- ☞ Ali Zadeh, Member

Planning Documentation Reviewed

California Marketing Concepts, Inc. (2012). *Comprehensive Marketing Plan of Work—Fiscal Year 2012–2013*.

California Marketing Concepts, Inc. (2013). *Newport Beach Restaurant Week Recap Report*.

Destination Consultancy Group, LLC (2013). *BID Assessment Survey Results*.

NBRA (2012). *BID Fiscal Year 2012–2013 Budget*.

NBRA (2012). *Newport Beach Restaurant Week 2012–2013 Budget*.

NBRA (2013). *NewportBeachDining.com Website Documentation*.