

# University Dining Services Strategic Plan 2008-2013

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# The Strategic Plan of Dining Services

2008 – 2013

## **Introduction**

The strategic planning process utilized by University of Montana Dining Services was a comprehensive and inclusive planning process. Leadership initiated a thorough review of all operational aspects of the campus dining program by first conducting a self assessment and then inviting a team of dining professionals to conduct a review using the National Association of College Food Services Professional Practices Manual. The assessment provided an in-depth, unbiased review of the current status of the dining program revealing strengths and opportunities for improvement.

Extensive feedback and input from UDS staff members and key stakeholders was formally solicited throughout the six month planning and document review processes.

The strategic plan contains the following key components:

- Environmental Scan: Strengths, Weaknesses, Opportunities and Threats
- Mission
- Shared Values
- Code of Ethics
- Beliefs and Guiding Principles
- Vision for 2018
- Strategic Initiatives, Directing Objectives, Strategic Activities and Milestones

These components serve as the road map for the future success of the dining program. The map identifies the current state of the environment as the starting point and communicates a compelling vision for where the dining program will be in 2018. The Strategic Initiatives, Directing Objectives, Strategic Activities and Milestones identify the specific changes and progress markers that are needed to bridge the gap from where we are today to our envisioned future. The Mission Statement is used to maintain focus on who we serve and our purpose. The sections titled Shared Values, Code of Ethics and Beliefs and Guiding Principles define how we interact with each other and the larger community in pursuit of our future and daily service.

## **Environmental Scan: Strengths, Weaknesses, Opportunities and Threats**

Successful organizations effectively monitor their operating environment for changes that could impact their financial stability and long-term viability. Annual self assessment of organizational strengths and weaknesses serve to monitor key factors that affect the organization's ability to maintain operations in the face of change in the environment. Examination of the external competitive and global environment serves to alert the organizational leaders to potential opportunities and threats that require immediate organizational responses.

Additionally, an environmental scan as part of a strategic process helps organizational leaders establish where an organization is currently with respect to their strengths and weaknesses and identify what strategic opportunities may be available and the threats that could prohibit realization of its envisioned future.

The following documents the environmental scan conducted as part of the strategic planning process.

*STRENGTHS:*

1. Staff
  - a. Our staff is proud, creative, dedicated, loyal, invested and cooperative.
  - b. We have quality individuals with the experience and expertise (individually and collectively) to train students and work effectively as a team.
  - c. UDS hires specialized positions such as registered dietitian, information technology and marketing managers.
2. Leadership
  - a. We have leaders who are stable, strong, and visionary with high expectations and standards.
  - b. UM Administration supports UDS.
  - c. Our leaders promote and encourage recognition of achievements.
  - d. We take responsibility for our actions.
  - e. We provide a model for a fun workplace atmosphere
3. Self – operated food service organization
  - a. The organization is student focused and service oriented.
  - b. Autonomy of managers promotes creativity and job satisfaction.
  - c. Cash flow and net revenue remain on campus.
  - d. Flexible and can respond quickly to campus needs.
  - e. State-wide involvement and leadership (Purchasing and Management Consortium, Farm to College).
  - f. Effective at creating and maintaining positive working relationships with the campus community.
4. Guest service
  - a. We serve guests.
  - b. Guest service is an attitude that is practiced.
  - c. Responsive to each guest's need.
  - d. We provide friendly service.
  - e. We create an inviting atmosphere.
  - f. Convenient centralized dining.
  - g. Simple, flexible, and easy to use meal plans.
  - h. We provide a variety of options in service locations.
5. Quality of food

- a. Our diverse menus are supported by a large repertoire of recipes.
  - b. Culinary reputation with NACUFS and Missoula community.
  - c. Recently purchased equipment supports production of our menus and recipes.
  - d. Computerized food production and menu management system (CBORD).
  - e. Menu and purchasing decisions are driven by product quality.
  - f. Our full service bakery provides fresh products that we could not otherwise obtain in Missoula.
  - g. We serve local and regional foods.
6. Student employees
- a. Provide diversity and vitality to the workplace.
  - b. Provide valuable insight about our guests.
  - c. Fill an important employment niche.
  - d. Assist in peer training and gain valuable work and life skills.
  - e. Are accessible/flexible/convenient for scheduling.
  - f. Are provided recognition programs and scholarships.
7. Commitment to professional development
- a. We encourage and provide internal and external training for employees.
  - b. We provide culinary skills workshops and advancement opportunities through career ladders.
  - c. We are active in professional associations including NACUFS, ADA, ACF, NACC, NRA, etc.
8. Fearlessness
- a. We aggressively seek new programs and projects.
  - b. We continually challenge ourselves to exceed the limits of our own high expectations.
  - c. We are willing to take risks.
  - d. We are not afraid to fail.
9. Strengths of UM
- a. Benefit package.
  - b. Commercial isolation.
  - c. Montana is a hot destination point and UM is a beautiful campus.
  - d. UM has a strong academic reputation.
  - e. Regional arts & culture center.
  - f. Political climate of the state and local governments support UM activities and good town & gown relationships.
  - g. Academic research activities increase funding streams.
  - h. Successful sports teams.
  - i. Food service reputation attracts students.
  - j. Tuition costs are competitive.

*WEAKNESSESS:*

*Personnel related:*

1. Recruitment:
  - a. Small and weak employment pools consist of candidates with limited knowledge, skills, and abilities.
  - b. Non-competitive base wages for all positions.
  - c. Lengthy and complicated recruitment process.
  - d. Wage compression is a concern as state and/or federal minimum wages increase.
  - e. College food service is not perceived as a desirable career opportunity.
  - f. the number of postings causes a perception that UDS is not a stable place to work.
  
2. Training:
  - a. Training is an ongoing and costly endeavor.
  - b. We are doing more training because of high turnover.
  - c. We lack a training plan and a person designated to execute the plan.
  
3. Retention:
  - a. Employee turnover is a significant cost to UDS.
  - b. UDS lacks an aggressive employee retention program.
  
4. Students:
  - a. Students are choosing to work fewer hours per week causing UDS to hire more students and invest more in training.
  - b. The state minimum wage was raised to \$6.15 and UDS is no longer wage competitive.
  - c. We are seeing a trend of students coming to work lacking even the basic employment skills and a strong work ethic.
  
5. General Weaknesses:
  - a. We don't give enough consideration to operational needs when planning for additional events and projects.
  - b. Too much time is spent in meetings.
  - c. We do not have an accessible comprehensive UDS planning calendar complete with special events, projects, and timelines.
  - d. The Food Zoo dining room and kitchen are in dire need of renovation.
  - e. Insufficient capital funds are designated to keep UDS facilities current in design and functionality.
  - f. UDS doesn't maximize the use of IT for efficient business practices.
  - g. Insufficient state general funds for the Montana University System.
  - h. There is a perception that UDS does not offer enough healthful choices.
  - i. UDS does not have a documented marketing plan.
  - j. UDS does not have a quantifiable method to assess our public image.
  - k. UDS staff is seldom able to attend major campus events as guests because we have operations open and we are often working the events.

- l. Current process of communicating information within UDS prevents a consistent message being delivered to all employees and contributes to a lack of unity between the units and shifts.
- m. We do not consistently recognize the warning signs of low morale and negative attitudes and take the appropriate immediate measures to correct the situation.
- n. We do not adequately recognize the accomplishments of our staff.

*OPPORTUNITIES:*

1. Enhance Existing Revenue
  - a. Redesign menus and concepts.
  - b. Employ suggestive selling in all retail operations.
  - c. We need to hold more special events in retail areas.
  - d. Take full advantage of contracts to leverage increased revenue (post off deals).
  - e. Increase revenue by changing campus perception of UDS.
  - f. Formulate plans to sell more services to GSA and Intercollegiate Athletics.
  - g. Development signature items for UDS venues.
  - h. Develop and market healthful choices.
  - i. Improve merchandising.
  - j. Sell more commuter meal plans.
  - k. Develop and implement a comprehensive marketing plan.
  - l. Strategically enhance revenues from the sale of alcohol.
  - m. Improve marketing of services at L & C.
  - n. Work with the UC Event Planning and Residence Life to enhance summer conference and contract business.
  
2. New Revenue
  - a. Capitalize on the benefits associated with UDS renovations.
  - b. Explore self-operated vending.
  - c. Seek new markets and locations for new facilities.
  - d. Explore food service potential for the COT renovation.
  - e. Work with the Chamber of Commerce, Alumni Association, and UM. Foundation to generate new business.
  - f. Explore viability of late night operations.
  - g. Develop new sources of revenue through cooking camps and classes.
  - h. Explore the possibility for a UDS catering venue and a convenience store at south campus.
  - i. Take advantage of \$500 stadium box food incentive to attract new permanent catering clients.
  - j. Work with Mission Mountain Enterprise Center to develop FTC retail products and labeling.
  
3. Training
  - a. Develop a training exercise for the UDS Emergency and Disaster Plan.
  - b. Develop and implement a training program for all UDS staff.

- c. Work with New Student Services to create and maintain a positive impression of UDS to new students and advocates.
  - d. Expand involvement with professional associations.
  - e. Work with campus resources to facilitate job success for special needs (language, disabilities) students.
4. Employment
- a. Focus on recruiting international students.
  - b. Develop culinary internship program including COT and international students.
  - c. Increase utilization of community resources to employ people with disabilities.
  - d. Partner with community restaurants to employ UDS staff during the summer.
5. Sustainability
- a. Expand the FTC program.
  - b. Increase the number of green products including equipment.
  - c. Complete the Think Tank Project utilizing sustainable building practices to achieve LEED certification.
  - d. Partner with Academic Affairs to create a sustainable learning lab at Think Tank.
6. Technology
- a. Utilize reporting capability of new POS system and CBORD for management decisions.
  - b. Revitalize the UDS website.
  - c. Utilize e-commerce to transact UDS business.
  - d. Utilize credit and debit tenders in all operations.
  - e. Evaluate the role of UDS in the future of the Griz Card Center.
  - f. Assist SAIT in the development of unified collaboration strategy
    - Pod-casting capabilities
    - Training
    - Online nutrition information
    - Surveys
7. Leadership
- a. Communicate a unified vision throughout UDS.
  - b. Cultivate relationships with new campus administrators and prepare for the transition to a new provost and president.
  - c. Continue to evaluate meal plans on an annual basis.
  - d. Take advantage trends and fads.
  - e. Continue to examine the organizational structure of UDS and re-evaluate as appropriate.
  - f. Maintain a positive relationship with the bargaining unit.

8. Reduction of Costs
  - a. Examine feasibility of centralized food production.

*THREATS:*

1. Outsourcing
  - a. Due to poor fiscal performance and food and service quality.
  - b. Change in leadership philosophy regarding outsourcing.
2. IT – Internal and External
  - a. Turnover of staff.
  - b. Inability to stay current with the evolution of hard and software.
  - c. Breach of IT security, i.e. inside job – viruses, hackers.
  - d. Lack of centralized control and campus vision & strategic IT plan.
3. Food Safety and Supply
  - a. Global warming and shrinking water supply.
  - b. Agri-business conglomerates.
  - c. Lack of consumer confidence.
4. Organizational Health
  - a. Recruitment & retention of qualified staff.
  - b. Competitive pay & benefits.
  - c. Poor communication, unresponsive management, and inflexibility (work style, philosophy).
  - d. Status quo or stale thinking.
5. Financial & Fiscal
  - a. Internal/Operational:
    1. Lack of capital resources.
    2. Ability to remain cost competitive for meal plans.
    3. Mandated hours of operation.
  - b. External/Macro economics:
    1. Increased general fund reliance on auxiliary funds.
    2. Food cost increase.
    3. Energy cost increases/fuel surcharges.
    4. Economic threat to middle class (enrollment).
    5. Impact of distance learning.
    6. State funding.
    7. National debt - college loans.
    8. Pandemic episode.
    9. Rising cost of healthcare.



## **Mission Statement**

University Dining Services enriches The University of Montana campus community by promoting sustainable business practices, providing outstanding cuisine, and delivering exceptional guest service, as we gather for dining, learning, and celebrating.

## **Shared Values**

UDS Culinary Professionals:

- Treat the people we serve as guests.
- Commit to local, regional and global environmental and economic sustainability.
- Exhibit passion in the pursuit of our profession.
- Respect the contributions, rights, and dignity of our diverse employees and guests.
- Value quality, excellence, health, responsiveness, integrity, and innovation.

## **Code of Ethics**

UDS Culinary Professionals:

- Serve with integrity, loyalty, competence, and professionalism.
- Uphold professional standards and practices that promote the missions of UDS, the division of Student Affairs, and The University of Montana.
- Refrain from engaging in private business or professional activities where there is, or appears to be, a conflict of interest with our institution.

## **UDS Beliefs and Guiding Principles**

- The campus community is best served by a self-operating food service organization. A self-operated foodservice is accountable to the mission of the university and is more responsive to the specific needs of the university's students, faculty, and staff.
- Our guests deserve delicious, safe, and nutritious food.
- We strive to consistently exceed expectations through exceptional and friendly guest service.
- Utilizing the UDS Performance Planning Program, we affirm, cultivate, and value staff through training and professional development.
- We seek profitability in all food service operations.
- We continue to explore and develop new revenue opportunities.
- We advocate for campus-wide sustainable business practices.
- We support the university by cultivating partnerships with our colleagues and recognize that support from those partnerships is critical.

## **Vision for 2018**

The international award winning University Dining Services is regarded by the campus as a high quality comprehensive collegiate foodservice organization. Our dining facilities and

restaurants are the number one destination for students, faculty, staff and campus guests to enjoy exemplary cuisine and guest service. University Catering Services is recognized as the premiere catering service in Western Montana.

UDS embraces a “students first” philosophy manifested in our programs, decision making, and variety of service options. Many of our programs engage, nurture and support student success in campus life and academics. Our supportive and caring staff is committed to the social and nutritional well-being of our students through educational programs, employment opportunities, and community building activities.

UDS promotes a culture of exceptional guest service through progressive personnel and management development programs. UDS is the employer of choice in the Missoula community with competitive, living wages and supplemental compensation for excellent performance. Every employee participates in a customized comprehensive training program. As a result, the UDS team is comprised of well-trained, highly skilled and food savvy culinary professionals.

Our Culinary Faculty is recognized throughout Montana and the Northwest for creating and delivering cutting edge culinary educational programs. We serve as a resource and our programs are models for colleagues involved in professional associations (i.e., ACF, NACUFS, IACP, NRA, NACUBO, NASPA). Building upon the expanded media exposure for the Culinary Skills Workshops, live cooking presentations, interactive specialty bars, student cooking competitions and ACF sanctioned competitions, UDS has established themselves as one of the premiere college and university dining programs in the nation.

UDS is a role model for environmental, economic, and workplace sustainability. Building upon the success of the FTC program, UDS has developed a comprehensive approach to evaluating and implementing local, regional, and global sustainable practices and business decisions. We promote sustainability through the integration of technological advancements; centralized food production; source-verified and environmentally friendly purchasing; resource conservation; the production and sale of FTC branded products; and educational programming. We engage the campus community in sustainable activities by integrating guidelines for LEED certified facilities, energy efficient equipment, paperless systems, pre-cycling, recycling, and provide learning and research opportunities for students, faculty and staff. We maintain and seek creative collaborative opportunities and partnerships to promote sustainable agriculture and business practices.

Developing and implementing our comprehensive Marketing and Communication, Technology, Emergency Preparedness, Assessment and Dining Facility Master Plans have been critical to our success. UDS is fiscally viable and responsible because of our exceptional ability to respond rapidly and effectively to changing technology, demographics, culinary trends, and socio-economic indicators.

## **Implementation and Review**

The Assistant Directors for Retail Operation and Residential Dining Operations and all Senior and Unit Managers will consult the UDS Strategic Plan prior to the cycles for the annual Operating Plans and Performance Plans. Directing Objectives and Strategic Activities will be included in the annual Operating Plan and individual Performance Plans. Progress toward meeting goals related to the Strategic Plan will be monitored during Performance Plan Check Point Reviews.

The UDS 2008 – 2013 Strategic Plan will be reviewed by the UDS Management Team each January and June for the plan's lifecycle. The UDS Annual Report to the Vice President of Student Affairs will include a status report of the UDS Strategic Plan.

## **Strategic Initiatives**

**Strategic Initiative 1:            Create an employment environment that supports a knowledgeable, passionate, productive, and engaged staff.  
Lead: Scott Strubinger**

### **Directing Objectives and Strategic Activities**

1. Improve the recruitment and retention of qualified staff.
  - a. The Assistant Director of Operational Support and Professional Development (ADOSPD) and UDS Human Resource Specialist will perform an audit and analysis of the current recruitment process and departmental retention rates. Completion date: 6/30/08. Lead: Scott
  - b. Develop new recruitment strategies for student and full-time staff. Draft due 10/15/08. Implementation date 8/15/08. Lead: Scott
    - i. Appoint a recruitment committee to recommend strategies. 2/29/08
    - ii. Establish benchmarks for employee retention, optimal size of qualified applicant pools, and standards for keeping the hiring process efficient and timely. 10/15/08
    - iii. UDS Director of Marketing and Human Resource Specialist will develop marketing strategies to increase applicant pools to targeted levels. Ongoing
  - c. Create an internship program between Academic Departments (i.e. College of Technology Culinary Arts Program) and UDS. Lead: Scott
    - i. ADOSPD will establish a working relationship with the Director of the Culinary Arts Program.
      - i. Schedule a meeting with Tom Campbell to discuss the possibility. 2/28/08

- ii. Obtain the academic criteria and assess how UDS could develop curricula to meet these criteria.
  - iii. Place students in assigned food venues and evaluate their performance.
  - iv. Use the internship program to recruit potential UDS employees.
  - v. Present overview of program by 6/30/08
- 2. Establish a comprehensive employee training program. Phase I (a-d) completion date 8/1/09. Phase II (e) Completion date 1/31/10.
  - a. Assess individual unit and departmental training needs. Completion date 8/30/08.
  - b. Update all role descriptions. Completion date 8/15/08.
  - c. Create training documents specific to each position. Completion date 8/1/09.
  - d. Create and implement a new employee orientation program for students, full-time employees, and temporary employees. Draft date 7/1/08 Completion date 7/23/08.
    - i. Develop a read and sign training program for temporary employees.
  - e. Build career ladders and in-line progression plans for all applicable UDS positions. Completion date 1/31/10.
  - f. The ADOSPD will coordinate activities that address current and anticipated training needs. Ongoing
- 3. Improve employee cohesiveness and job satisfaction within UDS.
  - a. Create and implement an effective team building program for UDS staff.
    - i. Assess current level of employee cohesiveness, job satisfaction, and team building practices. Completion date 8/31/08.
    - ii. Utilize the assessment feedback to establish baseline job satisfaction levels. Completion date 9/30/08.
    - iii. The ADOSPD will chair a team building work team to enhance cohesiveness in UDS and within all units. Ongoing
    - iv. An annual staff survey assesses job satisfaction, employee cohesiveness, and effectiveness of team building activities. 10/31/08-11/30/08.
  - b. The ADOSPD will conduct exit interviews and the information is used appropriately to address training opportunities and business practices. Ongoing.
- 4. Implement competitive wages that are congruent with local market conditions and industry standards. Ongoing
  - a. Form a work group comprised of the ADOSPD, UDS HR Specialist, and an HR Representative to create a report that compares local market wages, MUS wages, industry standard wages to current UDS staff wages to establish the wage gap. 2/28/09
  - b. Use the information to develop and implement strategies to adjust and fund staff wages as appropriate. 5/15/09
- 5. Develop guidelines for employee recognition. 1/1/09- 5/1/09.
  - a. The ADOSPD will assess present practices and collaborate with the Senior Management Team to establish the guidelines. Examples may include:
    - i. A letter of appreciation to recognize staff for outstanding service based on performance review comments.

- ii. Featuring employee accolades in Staff Stew newsletter.
  - iii. Developing and implementing an internal and external “catch me at my best” program.
  - iv. Encouraging unit managers to reward excellent employee performance with lump sum bonuses.
6. Create and implement a comprehensive Communication Plan. (Jerry- Consultant?)
- a. The ADOSPD and the Director of Marketing will research and develop the UDS Communication Plan.
    - i. Research and document all formal and informal communication methods presently utilized by UDS.
    - ii. Determine effectiveness or ineffectiveness of each current practice.
    - iii. Perform a gap analysis to identify areas for improvement.
    - iv. Research best practices for internal and external communication protocols.
    - v. Develop a draft Communication Plan to present to UDS Senior Management.
      - 1. Revise as appropriate.
    - vi. Present final Communication Plan to all UDS staff.
  - b. Identify and utilize an appropriate annual employee job satisfaction survey that includes assessment for communication effectiveness.

### **Milestones**

- Applicant pools and employee retention rates are at targeted levels.
- Appropriate training programs and workshops are in place.
- A job satisfaction survey exists and annually results reflect improvements in team cohesion and satisfaction with team building activities.
- An annually increasing percentage of employees indicate they are satisfied or highly satisfied with their job and work environment.
- Annual budget performance and benchmark data reflects improvements in employee productivity.
- The UDS Communication plan is developed and implemented.
- An annual job satisfaction survey indicates that 75% of UDS employees are satisfied with the flow of relevant and job specific information, the methods of communication, and the exchange of ideas throughout UDS.
- UDS employees participate in an annual Performance Planning Program that facilitates communication between supervisor and supervisee.

**Strategic Initiative 2: UDS will provide outstanding culinary services for our campus community and guests. Lead: Tom Siegel**

### **Directing Objectives and Strategic Activities**

1. Provide food and service that meets or exceeds guest expectations.

- a. Define parameters of successful guest service, and develop assessment tools that will allow UDS to measure the level of guest satisfaction. Completion date - 06/30/09.
  - b. Comprehensively survey industry trends and guests' needs in order to redesign menus, concepts, and service needs. Completion date- annually each year by 12/31/08
  - c. Develop at least one signature item in each unit.- Completion date- 12/31/08
  - d. Hold monthly meetings with marketing staff, culinary faculty, and unit managers and supervisors with the purpose of evaluating, improving, and maintaining effective merchandising techniques in all units. - Completion date- 6/30/09.
  - e. Provide guest service training annually for all staff. – Completion date – annually each year by 9/01.
2. Improve guests' perceptions of UDS guest services, and improve the national reputation and prestige of UDS as a premier university food service operation.
    - a. Enhance the marketing manager's role as UDS' public relations officer through formal media training. Completion date: 11/01/09.
    - b. Establish a protocol and clear set of expectations for the marketing manager to follow in communicating with the media for certain types of events and programs. Completion date: 11/01/09.
    - c. Provide training for culinary faculty members to enhance their public cooking, speaking, and demonstration skills. Completion date: 6/30/09.
    - d. Enter at least one NACUFS or national competition per year. Completion date: annually each year by 4/01.
    - e. Present at at NACUFS regional and national conferences. Completion date: 3/31/09.
3. Establish a comprehensive Menu Engineering Plan.
    - a. Write the Menu Engineering Plan to include principles, policies and procedures, menu layout, and retail pricing strategies. Completion date: 6/30/09.
    - b. Train all appropriate staff on the concepts, principles, and practices of menu engineering. Completion date: 01/30/10.
4. Expand UDS' offerings of international foods.
    - a. The culinary faculty will annually research, test, and menu international recipes. Completion date: 6/30/08.
    - b. Annually invite international student groups to assist in the planning of a special meal, celebration, or feast. Involve students in menu planning, serving, and decorating for the events. Completion date: 6/30/09.
    - c. Develop a recruitment process to select qualified international students to assist in development of appropriate authentic recipes. Completion date: 12/30/08.
    - d. Annually invite international students to share at least one authentic recipe from their family or country. Completion date: 12/30/08.
5. Encourage and support the credentialing and professional development of all culinary staff.

- a. Assign one member of the Culinary Faculty as a liaison with the local ACF chapter with the purpose of keeping culinary staff up-to-date with all ACF events, including the annual membership drive. Completion date: 6/30/08.
  - b. Encourage all culinary staff to enter ACF-sanctioned competitions. Complete annually by 6/30.
  - c. Host ACF practical exams once every two years. Completion date: Every other year by 6/30.
  - d. Develop a formal internship program with College of Technology (see training – Strategic Objective 3 – 3c). Completion date: 12/30/08.
  - e. Use the UDS performance planning program, culinary faculty, and staff meetings to formally invite culinary staff to join professional organizations and participate in the culinary career ladder. Completion date: 6/30/09.
  - f. Continue to provide practical culinary training to all culinary staff through annual Culinary Skills Workshops (CSW). Plan for culinary staff to attend regional or national trainings annually. Completion date: 6/30/09.
  - g. Host NACUFS sub-regional CSW biennially. Completion date: 6/30/10.
6. Continue to research new food and equipment products to enhance culinary services.
- a. Regularly attend professional association conferences and tradeshow (i.e. ADA, ACF, NRA, NACUFS, and NAFEM). Completion date: 3/30/09.
  - b. Network with vendors and other institutions to share information, sources, and ideas. Completion date: 12/30/08.
  - c. Attend tradeshow, fairs, and workshops. Completion date: 6/30/08.
  - d. Subscribe to and make trade magazines available to staff. Completion date: 12/30/09.
  - e. Collaborate with industry representatives to test food and equipment. Completion date: 6/30/09.
7. Implement a Hazard Analysis Critical Control Point (HACCP) food safety program.
- a. Appoint a HACCP committee to create an outline of steps needed to develop and implement HACCP in UDS. These steps will include writing specifications for purchasing an automated time-temperature monitoring system, writing HACCP-specific policies and procedures, and organizing the training of culinary staff. Completion date: 6/30/09.

### **Milestones**

- Guest satisfaction with culinary services increases annually, as evidenced by increasing positive guest comments and feedback obtained in semi-annual guest satisfaction surveys.
- Menu Engineering Plan exists and menus reflect increased international foods.
- Culinary practices meet all applicable requirements outlined in the NACUFS Professional Practices Manual.
- Projected unit sales are met or exceeded.
- All seven steps of the HACCP plan are completed, verified, and documented.

**Strategic Initiative 3:            **Become a campus leader and institutional role model for business practices supporting global sustainability and environmental stewardship. Lead: Mark LoParco****

**Directing Objectives and Strategic Activities**

**Planning**

1. Research best practices, other institutional programs, vendors, recipes, and preserving techniques to increase the utilization of local and regional food products and environmentally friendly cleaning supplies, equipment, and service-ware. Completion date: 07/15/08- Lead: FTC Coordinator
  - a. Create networks with other institutions to share information, sources, and ideas. Ongoing.
  - b. Attend tradeshow, fairs, and workshops. Ongoing.
  - c. Read trade magazines. Ongoing.
  - d. Coordinate with local producers and/or vendors on the development of co-branded FTC products. Ongoing- FTC Coordinator and Marketing Dept.
  - e. Research recipes and preserving techniques. Ongoing- Culinary Faculty.
  - f. Establish links between distributors, cooperatives, and local producers. Ongoing- FTC Coordinator.
  - g. Research composting and alternative uses for pre and post consumer food waste at the PEAS Farm. Lead: Mark.
  
2. Create comprehensive menu and equipment purchasing plans that support sustainable initiatives. Completion date: 07/15/09. Lead: Leta Brown, Tom Siegel
  - a. Establish menu writing practices to incorporate foods that meet UDS sustainable guidelines.
    - i. Determine equipment needs based on current market trends along with UDS menu guidelines. Ongoing.
    - ii. Build menus around current local product availability and seasonality. Ongoing
    - iii. Develop guidelines and timelines to incorporate local foods, bulk preparation, and foods preserved by UDS staff. Schedule bulk preparation of products during “slow” production months to maximize labor efficiency and/or seasonal availability. Completion date: 05/15/09. Lead: Tom Siegel, Culinary Faculty, Purchasing Committee.
  - b. Establish strategic guidelines for equipment purchases that consider versatility, equipment relocation applications, energy efficiency, conservation, year-round use, duty cycle for intended applications, service life, and future expansion plans.
    - i. Determine equipment needs based on energy consumptions, carbon footprint, ROI, and total cost of ownership. To include: duty cycle for intended application, maintenance costs, maintenance schedule, slow



depreciation name brands with a strong service and support network.

Completion date: 1/15/09. Lead: Leta Brown.

- c. Work with local producers to develop, co-brand, and stock distinctive FTC retail products for resale or use in UDS menus. Completion date: 08/15/08. Lead: Purchasing and Marketing Departments.

### **Implementation**

1. Create the UDS Sustainable Business Practices Manual. Completion date: 08/15/08.  
Lead: FTC Coordinator.
  - a. Define “sustainable” in relationship to UDS Business Practices.
  - b. Articulate the sustainable philosophies and business practices that will guide UDS purchasing practices. Consider EnergyStar equipment, green vehicles, fair trade, source-verification, pre-cycling, recycling, reuse, and reduction.
  - c. Establish baseline measurements.
  - d. Establish UDS expectations and benchmarks for improvement.
2. Collaborate with public and private, regional and local producers to manufacture and sell retail products under the FTC brand, or co-brand. Completion date: 7/1/09. Lead: FTC Coordinator, Tom Siegel and Marketing Department.
  - a. Establish processing, packaging, and branding guidelines for local FTC products. Ongoing.
  - b. Articulate specifications for each product. Ongoing.
  - c. Develop high visibility marketing strategies to promote FTC branded or co-branded products including the development of a retail label utilizing the FTC logo. Ongoing- Marketing Department.
  - d. Assist local growers in the development of marketing materials, including labels for FTC co-branded products. Ongoing- Marketing Department.
  - e. Menu FTC brand and co-brand products and sell retail products throughout UDS and the UC Market. As soon as they are available.
  - f. Expand sales territory of FTC branded and co-branded items for distribution in external outlets. Completion date: 7/01/10.
3. Provide training in bulk preparation, preservation, and value adding of unprocessed foods. Ongoing. Lead: Scott Strubinger, Tom Siegel, Culinary Faculty.
  - a. Develop coursework and training materials in food preservation and bulk preparation of food for staff. Completion date: 2/15/09.
  - b. Include bulk food preparation and preservation as part of the UDS Culinary Skills Workshops. Completion date: 2/15/09.
  - c. Purchase appropriate equipment to facilitate bulk food preparation and preservation. FY 09 Capital Request.
  - d. Utilize CBORD to assist in bulk preparation. Ongoing.

### **Outreach**

1. Promote public awareness of all UDS sustainable practices, including FTC. Ongoing.

- a. Market FTC branded products. Completion date: 7/01/09.
  - i. Create a UDS FTC Brand and Co-brand Product Committee to decide on products to develop in conjunction with local producers, cooperatives and packers. Lead: Jerry O'Malley and FTC Coordinator.
  - ii. Create market awareness through appropriate signage. Ongoing-Marketing Department.
  - iii. Create niche for FTC retail products. Ongoing.
  - iv. Create an interactive website for UM FTC Program. Completion date: 2/1/09.
  - v. Identify FTC products on our menus and websites. ASAP.
- b. Publish articles to inform the campus and public. Ongoing.
- c. Schedule special campus FTC food events (i.e. local foods cooking competition) and host public events to celebrate accomplishments and provide education. Ongoing.
- d. Make extensive use of media to publicize UDS sustainability activities. Ongoing. Lead: Marketing Department.
- e. Openly share our sustainable practices information and partner with local school districts and institutions to share product information and possibly coordinate purchases. Lead: FTC Coordinator and Marketing Department.
- f. Advocate for strategic alliances between producers, growers, and distributors. Ongoing.
- g. Advocate at the state level to create the statewide expansion of production facilities similar to the Mission Mountain Enterprise Center. Lead: Mark, FTC Coordinator.

### **Milestones**

- A comprehensive Sustainable Business Practices manual exists.
- Progress from baseline measurement in energy and waste reduction and increases in FTC purchases is documented.
- Management decisions demonstrate congruency with global sustainability and environmental stewardship.
- Applicable sustainable business practices initiated by UDS are used campus-wide.
- Documentation demonstrates an increase in requests for information regarding UDS sustainability practices.

**Strategic Initiative #4**                      **Create a comprehensive Marketing Plan for UDS.**  
**Lead: Jerry O'Malley**

### **Directing Objective and Strategic Activities:**

1. Engage the services of a consultant to develop a comprehensive Marketing Plan. Completion date: 6/30/08

2. Develop a comprehensive Marketing Plan to promote UDS' image, ideas, and products.
  - a. Determine internal (IA, Adams Ctr., UC, Printing and Graphics, Res Life, ASUM, SAIT, Enrollment Svcs., etc.) and external (Marketing Firms, NACUFS,) resources to establish the scope of the Marketing Plan. Completion date: 10/15/08.
  - b. Identify the funds needed to support the process of developing and executing the Marketing Plan. Completion date: 8/15/08.
  - c. Establish a timeline for the development of the Marketing Plan. Completion date: 11/15/08.
  - d. Identify benchmarks for assessment of the Marketing Plan. 12/15/08.
    - i. Assess current recognition and approval ratings of UDS brand and logos to establish a baseline measurement.
    - ii. Establish annual financial benchmarks for each unit.
  - e. Present the draft plan to the Vice President for Student Affairs and appropriate Student Affairs Directors for feedback. Completion date: 1/31/09.
  - f. Secure approval from the Vice President for Student Affairs and implement Marketing Plan. Completion date: 02/28/09.
  - g. Assess the effectiveness of the Marketing Plan based on the established benchmarks and stated objectives. Completion date: 5/31/10.
  - h. Make adjustments to the plan based on assessments, revise marketing activities, and implement changes. Completion date: 8/1/10
  
3. Create a comprehensive Assessment Plan for UDS
  - a. The UDS Senior Management Team in cooperation with the consultant will develop and implement the UDS Assessment Plan. Completion date: 1/31/09
    - i. Identify current assessment practices throughout UDS Completion date: 7/30/08
    - ii. Identify who and what business and management practices and processes are not presently assessed. Completion date: 7/30/08.
      1. Determine if practice or process needs assessment
      2. If yes, identify best practice and/or appropriate assessment tool
    - iii. Establish baseline data for all practices and processes to be measured. Completion date: 8/30/08.
    - iv. Where applicable, establish annual targets for all practices and processes measured. Completion date: 12/15/08.

### **Milestones**

- A comprehensive Marketing Plan exists.
- Resources are allocated to support the process of executing the Marketing Plan.
- Annual unit sales increases are directly attributable to the execution of the Marketing Plan.
- The Assessment Plan is developed and implemented:
  - Baseline benchmarks are identified and documented.
  - Benchmark targets are established.
- Annual assessment report:
  - Highlights progress from baseline benchmarks.

- Highlights progress toward established benchmark targets.
- A two year reassessment of the campus community demonstrates a 25% increase in the recognition of the UDS “brand” and logos and approval of the services provided by UDS.

**Strategic Initiative 5:            Develop a comprehensive technology plan.  
Lead: Andy Unbehend**

**Directing Objectives and Strategic Activities**

1. Develop a comprehensive Technology Plan (TP) for UDS. Completion date: 10/31/08.
  - a. Assess current business practices to determine areas where technology can improve processes, data security, employee productivity, and guest experience.
  - b. Identify hardware needs.
    - i. Recommend technologically appropriate devices for each position and operating unit. (i.e., pos, menu board, laptops, desktops, pda’s, tablet pc).
  - c. Identify software needs. 3/1/08- 6/30/08
    - i. Recommend technologically appropriate software for business enhancement processes and collaboration. Completion date: 09/01/08.
      1. E-commerce 8/1/08-8/20/08.
      2. On-line learning and training 8/1/08-8/20/08.
      3. Testing 7/1/08-7/20/08.
  - d. Develop a technology based training and support program for each individual position or Role Description (RD). Establish a timeline to implement the program. 10/1/08- 10/30/08.
  - e. Collaborate with SAIT to ensure compatibility of equipment and coordination of efforts. Ongoing.
  - f. Secure funding and purchase the necessary hardware and software to support the UDS TP. Ongoing.
2. Develop procedures for a computer test, Backup/Restore, maintenance, and Disaster Recovery Plan to include hardware and software. Completion date: 6/1/2008.
3. Assess satisfaction with technology. Completion date: 5/30/08.
  - a. Survey guests to determine satisfaction levels with technology based services provided by UDS. 4/1/08- 4/30/08.
  - b. Develop a plan to measure employee satisfaction, efficiency, and effectiveness of technologies available to UDS employees. 5/1/08- 5/30/08.

**Milestones**

- UDS Technology Plan exists. 10/31/08.
- Technology based training programs exist. 10/31/08.

- User satisfaction with technology resources and applications improves annually. 10/31/08.
- Resources are allocated to support the Technology Plan. Ongoing.

**Strategic Initiative 6:            **Maintain and expand a diverse and stable revenue portfolio to meet capital needs and respond to internal and external market forces and fiscal indicators. Lead: Leta Brown****

**Directing Objectives and Strategic Activities**

1. Maintain a minimum fund balance of \$250,000. Ongoing.
2. Annually contribute a minimum of 5% of gross revenue to the Auxiliary Capital Fund. Ongoing.
3. Continue to contribute annually a minimum of 10% of gross revenues to the University of Montana. Ongoing.
  - a. All direct and indirect contributions and transfers.
4. Develop a comprehensive Equipment Management Plan (EMP). Completion date: 6/30/10.
  - a. Develop policies and procedures for the procurement, maintenance, disposal, and replacement for all smallwares and major equipment. Completion date: 8/30/09.
    - i. Establish timeline for purchase of new and replacement of existing equipment.
  - b. Capital planning process allocates funds consistent with the EMP. Completion date: 10/30/09.
  - c. Establish semi-annual physical inventory cycles for all smallwares and functional and non-functional equipment by location. Completion date: 07/31/08.
  - d. Create an equipment log for each unit that includes each piece of equipment.
    - i. Purchase price and date, Cut sheet, and Capital Equipment Request form. Completion date: 12/31/08.
    - ii. Catalog repairs. Completion date: 7/31/08.
    - iii. Schedule of preventative maintenance. Completion date: 6/30/10.
    - iv. Estimated life expectancy of equipment. Completion date: 12/31/09.
5. Develop a Facilities Master Plan. Completion date: 6/30/11.
  - a. Engage the services of a consultant to develop a Facilities Master Plan. Completion date: 7/1/10.
  - b. Determine construction and renovation needs based on unit performance, guest feedback and campus needs. Completion date: 12/31/10.
    - i. Financial performance.

- ii. Location, design, and functionality.
    - iii. Facility life cycle and replacement plan: trends and guest appeal.
  - c. Research the feasibility of a centralized food production kitchen. Completion date: 6/30/11.
    - i. Perform a cost/benefit analysis.
    - ii. Assess equipment needs and location.
    - iii. Assess impact on sustainable business practices.
- 6. Renovate the Think Tank (Completion date: 12/31/09) and the Food Zoo (6/30/11).
  - a. Develop business plan and identify construction funds. TT- Completion date: 7/31/08; FZ- Completion date: 6/30/09.
  - b. Establish project planning committees. TT- Completed; FZ- Completion date: 12/31/09.
  - c. Establish preliminary concepts, menus, and design. TT- Completed; FZ- Completion date: 3/31/10.
  - d. Engage architectural services and formalize drawings. TT- Completed; FZ- Completion date: 6/30/10.
  - e. Conduct Charette Process to present architectural drawings to stake holders. TT- Completed; FZ- Completion date: 8/31/10.
  - f. Revise and finalize drawings and bid project. TT- Completed; FZ- Completion date: 12/31/09.
  - g. Begin construction and complete renovation projects. TT- Completion date: 12/31/09; FZ- Completion date: 6/30/11.
- 7. For each unit, establish performance benchmarks that measure success. Completion date: 12/31/09.
  - a. Identify current measurements, benchmarks, and best practices by unit. Completion date: 7/31/09.
    - i. Gross revenue.
    - ii. Operational expenses: food, labor (direct and indirect).
    - iii. Profitability.
    - iv. Guest satisfaction.
    - v. Historical performance.
    - vi. Industry standards and NACUFS benchmarks.
  - b. Annually set performance goals in the Operating Plan to assist in measuring success. Completion date: 12/31/09.
    - i. Departmentally.
    - ii. Unit (review quarterly).
- 8. Research and develop new revenue sources. Completion date: 6/30/09.
  - a. Evaluation to include, but not limited to: Completion date: 8/30/08.
    - i. Self-operated vending
    - ii. New markets and concepts for new and existing facilities (i.e. football stadium expansion)
    - iii. Food service potential at the COT
    - iv. Late night venues

- v. New items for retail sales with high priority to FTC and UMS:
      - 1. Co-brand
      - 2. In house
      - 3. Repackaged
      - 4. Value added (i.e., Mission Mountain Enterprise Center)
      - 5. South campus opportunities (convenience store, catering, green market)
      - 6. Home Meal Replacement (HMR)
    - vi. If deemed viable, implement new revenue source.
  - b. Assess and evaluate Commuter Meal Plan. Completion date: 12/31/08.
- 9. Increase summer and conference business. Completion date: 12/31/12.
  - a. Initiate discussion with key campus constituents about strategies to increase the volume of summer business. Completion date: 8/15/11.
  - b. Promote University Catering Services at wedding fairs. Ongoing.
- 10. Develop a process to respond to changing market forces. Completion date: 6/30/12.
  - a. Analyze market forces and forecast impact on campus and specifically UDS. Factors to consider, include but are not limited to: Completion date: 8/31/11.
    - i. Student demographics
    - ii. College loans
    - iii. Distance learning
    - iv. Enrollment
    - v. Work force
    - vi. Food costs
    - vii. Energy costs/fuel
    - viii. Wages
    - ix. Cost of living
    - x. Campus environment: staff levels, buildings, south campus expansion, etc.
  - b. Disseminate information to appropriate decision makers and key stakeholders. Completion date: 12/31/11.
  - c. Formulate an action plan and follow through in response to changing market forces and campus environment. Completion date: 6/30/12.

### **Milestones**

- Fund balance equals or exceeds \$250,000.
- UDS operations annually meet or exceed budget and contribution projections.
- An Equipment Management Plan and Facility Master Plan exist.
- Renovations are completed and revenue streams are stable.
- Performance benchmark assessments indicate annual improvement.
- Revenues from summer conference business have increased.