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Food & Beverage Iowa Business Quarterly

- 4 Letter from the Editor
- 6 Cover Story: Be Well in 2023
- 8 Be Well Operationally
- 10 Be Well Culture
- 12 Be Well Financially
- 17 Upcoming Event: Duffers, Diners & Drives
- 18 Legislative Update

9 ASK AN EXPERT...

OPERATIONS



11 ASK AN EXPERT...

CULTURE



12 ASK AN EXPERT...

FINANCE



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LETTER FROM THE EDITOR

What does it mean to “be well”? As the hospitality industry enters its first true full year of “post–Covid” operations, we’re still figuring it out.

Obviously to be considered financially well, you must generate enough revenue to cover expenses and turn a profit. That’s never been as easy as it sounds for the restaurant industry, where even in good times, profit margins hover around 6%. The pandemic fine-tuned many of our operational approaches. We found new ways to manage cash flow, control costs and grow revenue.

It was also the catalyst that propelled portions of the industry forward five years faster than we were ready for. Exponentially rapid advances in technology, along with shifts in consumer attitudes, changed everything from delivery models to menu sizes. Today at least 40% of operators say off-premises is a larger percentage of total sales than 2019. Consumers have fallen in love with delivery—there’s no going back.

Technology is also leading to trends like variable pricing, where menu prices are adjusted real-time, depending on demand. This lack of price predictability doesn’t appear to bother consumers. In fact, a recent National Restaurant Association study found that 79% of adults had a favorable reaction to the concept of variable pricing.

However, restaurant industry employees are still looking for a relief valve.

Working in the restaurant industry is physically demanding and can be mentally exhausting. Putting the needs of everyone before your own day-in and day-out can deplete people to the point of burnout. There’s no working remotely in the restaurant industry—you have to show up daily—and be ready to serve.

This issue looks at ways restaurants can be well operationally. However, the piece I’m most excited to



share and promote to the industry is a new tool to be well emotionally. Teladoc is a program from the Iowa Restaurant Association that provides a true mental health benefit.

For \$9 per month restaurant industry workers (full-time, part-time, seasonal) can access unlimited telehealth with \$0 copays. That same \$9 also covers the people in their household (spouses, children, partners.) It even includes mental health coverage. Restaurant workers and their family members have access to therapists with whom they can establish a relationship and meet as often as needed, again with no copay.

As an industry, we’ve been through the fire. There’s not one of us who couldn’t use an unbiased professional ear to lean on—sometimes or regularly—just to ensure we’ve all found our footing on the other side. The beauty of Teladoc is anyone can now afford professional help. I’ve signed up my entire team for this benefit and I hope you will consider it for your team as well.

Call us or check out the Healthy Hospitality information on the Association’s website for more information.

Here’s to You and Your Wellness!

Jessica Dunker
President & CEO | Iowa Restaurant Association



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CHARTING A COURSE FOR YOUR RESTAURANT TO “BE WELL” IN 2023

What does it mean for a restaurant to “be well?” Prior to 2020, it was generally defined as a year-over-year increase in net profit. Post-pandemic, many equate wellness with “survival.” But as we enter 2023, surviving isn’t enough. Restaurants looking to “be well” must have a plan for prosperity that includes new strategies for everything from managing expenses to employee mental health.

Whether it’s tracking food and labor costs or surveying consumer behaviors, nearly every organization that systematically studies the restaurant industry points to the many obstacles restaurants continue to face.

That being said, Iowa operators have a surprising breadth of tactics available to help their establishments once again find their footing. The most effective strategies are almost all directly connected to tracking. Tracking what? Tracking anything.

Nearly two-thirds of every restaurant sales dollar goes toward prime costs—food, beverage, and labor. These are also some of the most obvious and volatile inputs to track so it’s no surprise that a recent survey from restaurantowner.com found that operators who incorporate best practices with their accounting are far more likely to be profitable than those who don’t. In fact, the study showed that reviewing a profit loss statement at least once per month is crucial to success. 73% of restaurants deploying this practice reported being profitable while less than half of those who looked at a P&L only once a quarter or annually kept pace. Nearly similar results were reported by operators who weekly tracked food and labor costs. 75% of those who received weekly food and labor cost reports were profitable compared to 60% of those who did not.

The net-net? Track anything that can be measured in your restaurant. That data likely holds the power and answers to how your operation (and you) can be well in 2023.



COUNTERING RISING COSTS

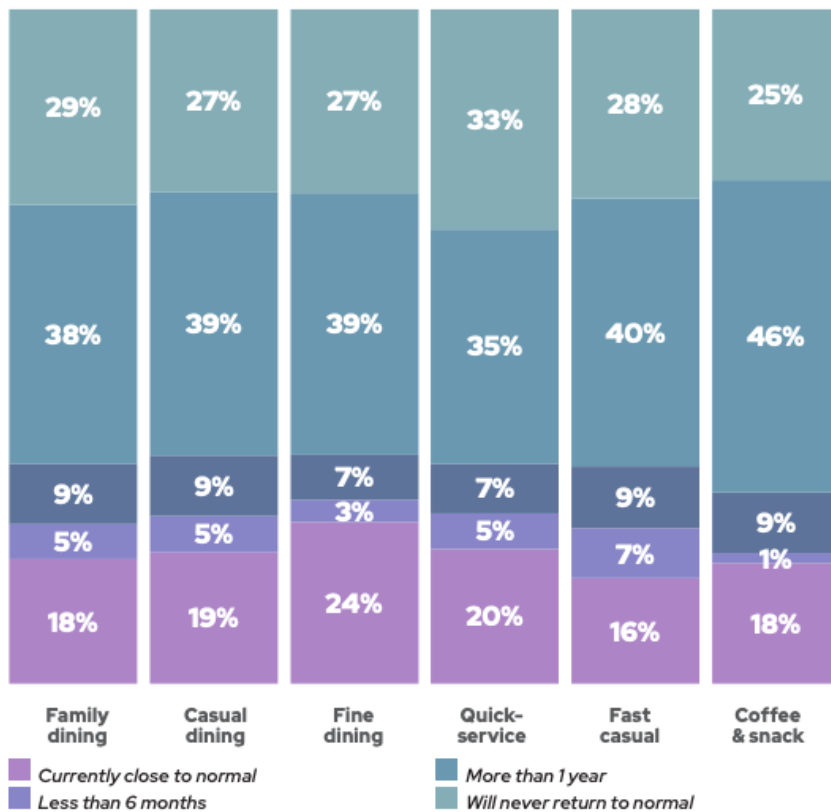
THERE'S NO ONE WAY TO RESPOND TO THE STEEP INCREASE IN COST OF GOODS AND COST OF LABOR. RESTAURANTS MUST TAKE A MULTIFACETED APPROACH TO STAYING PROFITABLE.

THE NATIONAL RESTAURANT ASSOCIATION SURVEYED THOUSANDS OF OWNERS ACROSS THE COUNTRY TO ASK WHAT STEPS THEY ARE TAKING TO STAY PROFITABLE.

ASSESSMENT OF BUSINESS CONDITIONS

In their recently released State of the Industry Report, the National Restaurant Association found that with few exceptions, more than one and four restaurant owners don't see a future for the industry that looks the way it did in 2019. Quick-service operators were the most doubtful with 33% saying business conditions will never return to normal for their restaurants.

Restaurant operators report when they think business conditions will return to normal for their restaurant



Source: National Restaurant Association

87%

ARE INCREASING MENU PRICES

48%

REDUCED HOURS OF OPERATION

59%

CHANGED THE FOOD AND BEVERAGE ITEMS THEY OFFERED

32%

CLOSED ON DAYS THEY WOULD NORMALLY BE OPEN

38%

SAY THEY STOPPED PLANS FOR EXPANSION

35%

SAY THEY STOPPED OPERATING AT FULL CAPACITY

FREE TOOLS MAY HOLD THE KEY TO A PROFITABLE MENU

Over the past two years, Iowa restaurateurs have been forced to ask themselves the nagging question, “What is the threshold for what patrons will pay for a coffee, a beer, a burger, a pizza, a steak... etc.” In 2022 restaurants saw their cost of goods soar to never before seen levels. In fact, average wholesale food prices were up a record 24%. Cooking oil prices alone were up nearly 50%.

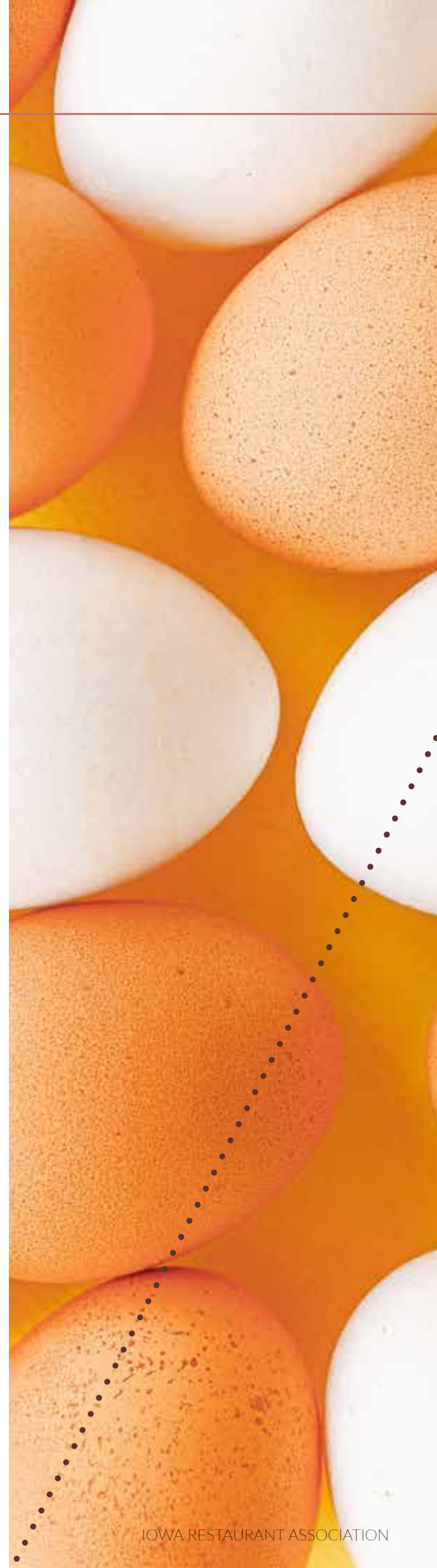
Thankfully at the height of COVID closures and mandates, consumers were mostly unphased by increased menu prices. However, today they too are feeling the squeeze of inflation rates north of 8%. There is some cushion for the industry as 64% of adults still say restaurants are an essential part of their lifestyle. Nonetheless nearly half also report they are “holding back a bit” on spending until the economy improves.

So, what proactive steps can restaurants take on their menus to “Be Well” in 2023 and beyond?

As basic as it might sound, diligently tracking food costs and making necessary adjustments to menu prices, recipe ingredients, and portion sizes may hold the key. Experts share it’s equally important to conduct weekly inventories of food supplies and take advantage of discounts or promotions offered by distributors to reduce costs.

The just released State of the Industry Report from the National Restaurant Association reports that last year, 2/3 of restaurants were willing to take their business to a different supplier to save costs and more than 30% were willing to substitute lower cost items on their menus. What’s more 40% modified portion sizes in response to soaring food costs.

One of the best ways restaurateurs can ensure they are sourcing, pricing and portioning menu items for profitability is to use one of the recipe calculators offered by food distributors. These dynamic tools often auto populate and adjust recipe costs with up-to-the minute pricing to ensure a real-time understanding of what you should be charging to ensure profit (at least from a food cost point of view.) There are obviously other factors that impact the cost of preparation, but real-time recipe calculators can help restaurateurs take steps to get back to the 28% to 35% “food cost sweet spot” for profitability.



WHAT THE EXPERTS SAY..

93%

OF OPERATORS SAY THEIR RESTAURANT'S TOTAL FOOD COSTS (AS A % OF SALES) ARE HIGHER THAN THEY WERE IN 2019.

"Today's operators need to take advantage of every tool in their toolbox to increase efficiencies and reduce unnecessary expenses. One of the most important pieces of that mix is understanding the fluctuating cost of supplies and how that effects your menu and every ingredient that goes into that menu. Whether you use a POS system or use a menu cost analysis tool from your distributor, it's important to have real time updated food cost to calculate your entire menu in real time. When our customers use our MPower Recipes and consistently track and manage their menu on a regular basis, they have a 50% greater chance of being profitable—even when food prices are extremely volatile. If your menu prices are not set correctly to the current fluctuation in cost of goods, it's detrimental to your business. Our advice? Stay proactive and make ingredient and menu adjustments accordingly. Technology has come a long way and if you utilize the tools that are available to operators, in many cases at no cost, your chances of success will ultimately increase. I suggest doing weekly or monthly inventory to validate your food cost. One of the largest expenses for operators is waste or over portioning, this will ultimately kill your food cost."



Bret Petersen is Director of Sales for Martin Bros. Distribution, an independent, full-line supply and food distributor serving Iowa and seven surrounding states.

ADJUSTING TO HIGH FOOD COSTS

% of restaurant operators* that took the following actions due to higher food costs in recent months

Action taken	Family dining	Casual dining	Fine dining	Quickservice	Fast casual	Coffee & snack
Shop around for other suppliers	72%	74%	73%	52%	67%	72%
Cut costs in other areas of the operation	56%	55%	48%	60%	55%	56%
Increase tracking of food waste	41%	39%	30%	47%	46%	31%
Adjust portion sizes	40%	52%	47%	28%	39%	33%
Substitute lower-cost items on the menu	35%	45%	37%	23%	29%	30%
Purchase more items from local sources	28%	27%	31%	24%	36%	35%

National Restaurant Association

PRIORITIZING PHYSICAL & MENTAL HEALTH FOR YOUR RESTAURANT TEAM



The restaurant industry has always been known for being fast-paced, as well as physically and mentally demanding. Front- and back-of-the-house staff are wired to deliver excellent guest experiences – from great food and drink, to welcoming ambiance, to exceptional service. Ironically, the same people whose jobs focus on the care and feeding of others, often let their own needs fall by the wayside.

Successful operators are finding creative ways to address the overall wellness of their organizations by promoting wellness among their staff. The benefits to shining a light on staff health are many. It can lead to fewer sick days, improved customer service, higher employee retention, and a more positive atmosphere overall.

The Iowa Restaurant Association is helping Iowa operators address employee wellness head on. The Association recently launched Healthy Hospitality—a set of programs created for the restaurant industry by the restaurant industry. From a negotiated savings on group health insurance to free services that help part-time and full-time employees take advantage of federal insurance subsidies, Healthy Hospitality provides all size operations access to cost-effective benefit programs, as well as cost free wellness services for employees. Visit restaurantiowa.com to learn more.

52%
OF HOSPITALITY
WORKERS WHO LEFT
THEIR JOBS DID SO
DUE TO BURNOUT

2021 Limeade Employee Wellness Survey

WHAT THE EXPERTS SAY..

“It’s never easy to talk about mental health issues in the workplace. However, acknowledging that our industry has one of the highest rates of mental health concern, as well as addiction, is imperative to caring for our most valued assets—our employees. At Orchestrate we have made EAP, the Employee Assistance Program, available to team members. This gives them short-term counseling and in-the-moment support for stress, anxiety, depression and other emotional well-being needs. We also provide assistance to connecting to local organizations that can meet our team members where they are. In our industry we are so quick to look out for the needs of everyone around us, that we don’t prioritize caring for ourselves. As an employer, we feel it’s more than our responsibility to provide access to resources, it’s a key to our organizational well-being and success.”

Jeannine Buckingham is Director of Human Resources for Orchestrate Hospitality, a Des Moines hospitality management company which operates a dozen restaurant, hotel, and market properties.



RESTAURANT WORKER DEMOGRAPHICS FAVOR VIRTUAL CARE

Young people have traditionally been, and continue to be, drawn to the restaurant industry. In fact, the median age of a U.S. restaurant worker is 32 years old. These younger workers are also more open to new things like virtual care. This gives them the flexibility to speak to a medical professional whenever and from wherever they'd like. One study found that 55% of millennials and 60% of Gen Zs are comfortable with the idea of virtual care. This is a significant increase from previous generations and with more virtual access than ever, could have a major positive impact on the health and well-being of Iowa's restaurant workers.

63%

OF PATIENTS ARE INTERESTED IN MORE DIGITAL HEALTH SOLUTIONS

McKinsey 2021 Study

IOWA RESTAURANT ASSOCIATION NOW OFFERS TELEDOC HEALTH

An exciting new benefit available to IRA members is Teledoc Health. It's available to full-time, part-time, seasonal, H-2B, and 1099 employees.

\$9 per month per employee nets both the employee and ALL of their family members:

- A Doctor in Minutes -- 24/7 non-emergency general medical care with a doctor on the phone or computer - unlimited visits and \$0 copays
- Mental Health—the ability to build an ongoing relationship with a therapist or psychiatrist of their choice by appointment 7 days per week - unlimited appointments and \$0 copays
- Dermatology—upload images of skin conditions and receive personalized treatment plan—unlimited visits and \$0 copays
- Unlimited, no-cost personal nutritional advice from a registered dietitian, neck and back care with a certified health coach, and expert medical advice.

WHAT CAN BE DONE IN A VIRTUAL VISIT?

Teledoc services can provide care for a surprisingly long list of ailments. Doctors are able assess conditions, write prescriptions, and make recommendations for care.

55 COMMON MEDICAL CONDITIONS THAT CAN BE TREATED VIRTUALLY:

- | | |
|---|---|
| 1. Abdominal pain | 29. Genital herpes |
| 2. Acne | 30. Headache |
| 3. Acute gouty | 31. Hemophilus |
| 4. Arthropathy | 32. Herpes simplex |
| 5. Allergic rhinitis | 33. Hordeolum extremum |
| 6. Allergic rhinitis due to pollen | 34. Infective otitis externa |
| 7. Allergy | 35. Influenza |
| 8. Anxiety | 36. Insomnia |
| 9. Asthma | 37. Laryngitis |
| 10. Atopic conjunctivitis | 38. Lumbago |
| 11. Backache | 39. Lymphadenitis |
| 12. Bacterial pneumonia | 40. Mucooid otitis media |
| 13. Bronchitis | 41. Nasopharyngitis |
| 14. Bronchospasm | 42. Nonsuppurative otitis media |
| 15. Candidiasis, vulva and vagina | 43. Otalgia |
| 16. Chronic rhinitis | 44. Other cellulitis and abscess |
| 17. Conjunctivitis | 45. Pharyngitis |
| 18. Constipation | 46. Rash and other skin eruption |
| 19. Colitis, enteritis, and gastroenteritis | 47. Serous otitis media |
| 20. Cough | 48. Sinusitis |
| 21. Croup | 49. Sprains and strains |
| 22. Cystitis | 50. Streptococcal sore throat |
| 23. Diarrhea | 51. Tonsillitis |
| 24. Dizziness and giddiness | 52. Upper respiratory infections |
| 25. Dysuria | 53. Urinary frequency/urination abnormality |
| 26. Esophageal reflux | 54. Urinary tract infection |
| 27. Essential hypertension | 55. Vaginitis and vulvovaginitis |
| 28. Fever | |

CREDIT SURCHARGES CAN HELP SALVAGE DECLINING PROFIT MARGINS



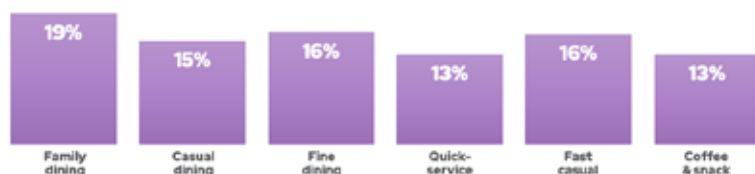
Credit card processing fees have more than doubled over the last decade. For many Iowa restaurants swipe fees rank as their third highest expense—just behind food and labor costs—and above rent or mortgage. As fees continue to grow exponentially, more operators have made a decision that once seemed unthinkable—adding a surcharge for credit card use on customer checks.

MOST CUSTOMERS UNDETERRED BY SURCHARGES

Today, 15% of restaurant operators are charging a fee to customers who use credit cards. The vast majority of those (80%+) believe the practice will likely continue into the foreseeable future. It is more common in larger markets such as the Des Moines area, where the practice became commonplace after a few well-known operating groups implemented the surcharge across multiple concepts all at once. Nearly all of these operators have expressed surprise at how little, if any, pushback they've received from customers about the new charge. Some operators will remove the fee if customers balk at the fee. However, the number of disenfranchised customers is negligible at best, and those who are bothered generally choose to pay with cash.

\$100+ MILLION
IN CREDIT CARD FEES PAID BY IOWA
RESTAURANTS & BARS IN 2022

% of restaurant operators who say their restaurant is currently adding fees or surcharges to customer checks as a result of higher costs



Source: National Restaurant Association

WHAT THE EXPERTS SAY..

“Surcharging has allowed small business owners to recapture a portion of the profit margins they’ve lost over the last couple of years due to inflation and rising operating costs. For some restaurants operating on tight margins, a surcharge can be the difference in them being profitable for the month. Because of this, the popularity of surcharging programs has dramatically increased over the last two years. However, there are certain rules you must follow if you’re considering passing on a surcharge to your customers. First, you must register with your processor 30 days in advance of implementing the surcharge. Then, you must post signage about your surcharge, as well as show it on your receipt. One last thing, to be compliant, the maximum allowable surcharge is 3%. If you have any questions regarding the program, and its rules, be sure to talk to your current provider.”

Steve Casteel, is president of Payteva, a solutions provider of credit card processing, payroll processing and point of sale systems.





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BE WELL AND CELEBRATE



Iowa's hospitality industry is full of unsung heroes. Every so often the Association hits the pause button and invites the restaurant community to take time to celebrate the best of the best.

NOMINATE AN OUTSTANDING OPERATOR

In November the Association will host its annual industry awards gala honoring, among others, the restaurateur, chef, employee, and purveyor of the year. There are also honors celebrating diversity, sustainability, philanthropy and more. In all, there are 14 award winners who are recognized at this gala event, in the Food and Beverage Iowa Business Quarterly magazine, and in a social media campaign. Nominations are being taken online at the Iowa Restaurant Association's website. Members of the industry and public can nominate candidates for consideration.

ELEVATE THE PROFILE OF WOMEN IN HOSPITALITY

This is the 5th year the Iowa Restaurant Association will present its 40 Women to Watch in Iowa's Hospitality Industry. The honorees hail from nearly every segment and function in hospitality—from purveyors and entrepreneurs, to chefs and business development professionals. Nominations are received from across the state from customers, peers, employees, families and friends. The 40 selected women hospitality professionals are showcased in the Food and Beverage Iowa Business Quarterly, in a social media campaign, and at the annual Celebrating Excellence Gala. Nominations are made online and are now open.

RECOGNIZE LONG STANDING TEAM MEMBERS

Celebrate the people who stand by your side. The Iowa Restaurant Association's Stars of Hospitality Program celebrates non-owner/operators who have made a career in the restaurant industry by working at a single association member establishment and/or for a company for 20+ consecutive years. An Association representative will come to your establishment to present your employee(s) the award. They will also be recognized in Iowa Restaurant Association social and print media. Submit your employee names to ezimmerman@restaurantiowa.com.

COMPETE IN THE STATE CULINARY COMPETITION

For more than two decades the Iowa Restaurant Association, along with its partners, have hosted a statewide culinary competition. Different from many competitions which require chefs to travel to a single location and compete on the same day, the Iowa Restaurant Association sends a group of judges to each chef's restaurant to enjoy his or her culinary creations within the context of the establishment. The Chefs are also part of the Association's annual Gala where they bring sample portions of their competition dishes and event attendees select a People's Choice winner. Competitors are now being accepted for this fall's competition. Contact skluesner@restaurantiowa.com.

CELEBRATE THE FUTURE OF THE INDUSTRY

The Iowa Restaurant Association Education Foundation is committed to building future industry talent through its high school culinary and restaurant management program ProStart. One of the most exciting parts of the program is the annual ProStart Invitational where schools from across the state participate in a culinary competition in the morning and a restaurant concept pitch/management competition in the afternoon. For the second year running the students of Hampton-Dumont High School were the state Culinary Arts AND Restaurant Management Champions. In May, the teams will travel to Washington D.C. to compete against students from across the country at the National ProStart Invitational where they hope to top last year's 9th place Culinary and 16th place Management places!

APPRECIATION OF INDUSTRY PARTNERS

The Iowa Restaurant Association and the Education Foundation are thankful for our industry partners who make all of our awards and competition events possible.

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Proposed Updates to Teen Work Rules

This legislative session the Iowa Restaurant Association is part of a coalition of industries recommending changes to Iowa's youth employment laws. The group collectively reviewed Chapter 92 of Iowa Code and quickly realized that many of the existing restrictions are more than a century old and no longer relevant to any work environment. As an example, there were restrictions related to shoe shine boys and corner newspaper sales. There were also different work standards for migrant children and citizen children.

As the group dug into the Iowa laws, each industry brought forward reform suggestions that would positively impact the opportunities available to teens looking to work in their various industries. For the Iowa Restaurant Association there are three key changes in the now proposed legislation that could positively impact the industry and expand opportunities for teens.

- The extension of Minor School License (MSL) privileges, which allow 14 ½ and 15 year olds who have completed drivers education to drive a direct route to-and-from a job, in the same way they are currently allowed to drive a direct route to-and-from school activities.
- The extension of work hours for 14- and 15-year-olds to 9 p.m. on weeknights and 11 p.m. on weekend nights year round.
- The ability for 16- and 17-year olds to deliver alcohol to tables and ring up tickets which include alcohol in restaurants (bars and taverns excluded.) This privilege would require parental consent.

As of press time, this legislation was still alive however it was triggering significant protest from groups such as the United Auto Workers and other pro-union organizations. They organized events across the state to express their opposition. Their primary argument against proposed changes in companion bills SF 542 and HF 647 center around wages. They argue that rather than lowering age requirements for certain work activities and hours, businesses should pay living wages for parents instead of having teens work in expanded capacities. They see no need for entry level wages.

As the lead advocate for the industry which provides half of the people in the state with their first work experiences, the Iowa Restaurant Association continues to promote the notion that it is important to make space for entry level positions. Restaurants and retail stores are great places for teens to earn while they learn valuable work skills. The Association contends that there will always be a need within the employment ecosystem for entry-level jobs and wages. In the Iowa, restaurant entry level wages currently average \$12 per hour for teens.

Watch for updates on this and other legislation in the Iowa Restaurant Association's Week in Review E-News. Not receiving Week in Review? E-mail ezimmerman@restaurantiowa.com to be added to the list.

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For over 80 years we have devoted our business to helping our customers grow their operations.

In the midst of the most unique time in our history, we proudly remain a customer-centric, family and employee-owned operation with a strong mission to serve our customers with innovative solutions and superior performance by delivering the products, tools and service necessary to help you succeed.

Access new resources developed to help our operators in the midst of supply chain challenges:



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