19TH ANNUAL
Restaurant Industry Conference
Restaurant Realities: Making It Real ... Getting It Right!

Thu, Apr 16, 2015
7:30am-7pm
Covel Commons, UCLA
Welcome to Our 2015 Conference

UCLA Extension is proud to present our 19th Annual Restaurant Industry Conference, in collaboration with world leaders in brand development, food service design innovation, operational excellence, market analysis and customer satisfaction.

This year we honor Kevin Reddy, the strategist and leader behind Noodles & Co.'s national brand and presence. We also recognize many leaders from an ever-more effective Starbucks, as well as private equity funders who make new concepts come to life. UCLA Extension serves approximately 50,000 students annually through Westwood and Downtown Los Angeles campuses, plus online courses serving U.S. and international students on a worldwide basis.

In the Business, Management & Legal Programs Department, we focus on certificate programs and courses across industries (i.e., Web analytics and social media marketing, small business management, credit analysis, finance, accounting, etc.) and on specific industries (hospitality, financial services, consulting, security, real estate, etc.). This conference is emblematic of Extension’s focus on the development of both practical and strategic skills with a 2,000+ instructor team who are top practitioners in their professions. We thank you for joining us this year, and look forward to seeing you again in future years! We also look forward to you and your employees taking advantage of some of the 5,000 professional development and continuing education courses we offer each year.

Roger Torneden
Director, Department of Business, Management, and Legal Programs, UCLA Extension

Circle of Excellence Members

The following restaurant operating companies support the 19th Annual UCLA Extension Restaurant Industry Conference in our advocacy of education, leadership development, networking, innovation, and community involvement in the restaurant industry:

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california PIZZA KITCHEN

Great franchisees. Great brands."
This year the Conference is exploring major influences currently shaping the restaurant industry. We are all familiar with the growing guest emphasis on high quality ingredients, local sourcing, healthful menus, natural and minimally processed food, and sustainability. Both guests and employees are now also requiring attention to issues related to fairness, transparency, and accountability when dealing with employees, customers, and society-at-large. And there are a myriad of significant – and intriguing - disruptive forces at work, including integration and communication among formerly disparate audiences, highly-effective influencer marketing messages, and significant social forces in favor of viewpoints which were not previously accepted. During Advisory Board meetings, we’ve referred to this as the “Get Real” conference, and I believe that shorthand term sums it all up quite accurately!

Our morning keynote, Clarice Turner, Senior VP at Starbucks, begins the day examining customer expectations and the pressures all businesses feel to meet those expectations. Our State of the Industry speech by Chris Keating, Market Leader of Penton Food and Restaurant, will provide an overview of social, economic, legislative, and consumer trends affecting the industry. Some of these themes will be explored more deeply by later “TED-style talks” on marketplace change agents, the perception of “local” by consumers (a first look at the much-awaited Technomic study on this subject), and a holistic approach to the guest journey.

Our Innovation Award Winner this year is Kevin Reddy, Chairman and CEO of Noodles & Company. Kevin and his company in many ways reflect the epitome of the new restaurant realities. He is in the forefront of the movements toward wholesomeness and healthiness in menu items, local sourcing, and empowering employees and raising from within. We will look closely at private equity investing in restaurants, and have taken a unique approach, examining such investments from the points of view of both the PE firm and the restaurant executive. Our emerging concepts in the newly-christened “Getting It Right!” panel are really exciting and distinctive, and each brings something (or many things) new and different to the table.

We’ve put together an incredible group of people, both on the stage and behind the scenes. I’m extremely proud to serve as Chair of the Conference, and very grateful to the members of our Advisory Board and the staff of UCLA Extension for their hard work in designing the conference curriculum and organizing such a powerful group of speakers. I am also very grateful for the strong financial commitment of our generous sponsors and Circle of Excellence members.

I’d also like to thank each of you for attending. I invite you and your companies to become personally involved with the Conference by contacting me at anna.graves@pillsburylaw.com.
Restaurant Realities: Making It Real . . . Getting It Right!

Conference Program

7:30 – 8:30
Registration and Continental Breakfast

8:30 – 8:45
Welcome and Program Overview
Roger Torneden, Director, Department of Business, Management, and Legal Programs, UCLA Extension
Anna M. Graves, Partner and Co-Leader of the Restaurant, Food & Beverage Industry Group, Pillsbury Winthrop Shaw Pittman LLP

8:45 – 9:30
Opening Keynote:
Clarice Turner, Senior Vice President, US Business Americas, Starbucks Corporation
Being Brave: Facing Realities, Embracing Opportunities
We’re in a dynamic and changing business reality, with customers expecting more transparency, options, and accountability from us as operators. There are so many pressures in our business, but these same pressures create a wealth of opportunities if we’re brave enough to recognize, embrace and make the opportunity our own.

9:30 – 10:15
Featured Speaker:
Chris Keating, Vice President/Market Leader, Penton Food and Restaurant Group
State of the Industry
The U.S. Foodservice Industry is now a $700B business. Foodservice maintains a consistent growth pattern by constantly changing and adapting. Whether it is consumer trends, weather, legislation, technology, the economy, or an abundance of other factors, the industry manages to adapt and flourish.

This presentation by Chris Keating will look at the factors that will affect the foodservice industry in 2015, through industry research, data, and trend predictions, including insights from Food Management, Nation’s Restaurant News, and Restaurant Hospitality.

10:15 – 10:45
Networking Break

10:45 – 11:45
The Role of PR, and When is it Right for You?
Whatever the size of your company, small or large, a strong and well-understood brand is your most valuable asset. How you define, protect and promote your brand amongst a host of audiences (customers, employees, the press, investors, employers) will have enormous impact on your success. That fact, combined with a new ecosystem of integrated audiences, all talking to each other, has permanently changed the way organizations communicate. As a result, whether your objective is to drive traffic, build a culture, attract investment or manage through a crisis, strategic PR and communications is increasingly important for companies of all size, as they evolve in today’s dynamic marketplace.

This discussion will review specific examples of how companies in various stages of their life cycle leveraged PR and communications to support their strategic business objectives.

Moderator:
Anton Nicholas, Managing Director, ICR
Panelists:
Jean-Paul Kyrillos, President, The Daily Meal
Srinivas Kumar, CEO, CraftWorks Restaurants & Breweries, Inc.
Brett Schulman, CEO, Cava Group, Inc.
Edward Valle, Chief Marketing Officer, El Pollo Loco

11:45 – 12:45
Private Equity Investing In Restaurants — More Than Just The Money: What Do The Investors Look For? Are They Helpful? Might They Be A Hindrance?
Throughout the 1990s and the early part of this century, most private equity firms focused on restaurant companies of at least regional size — sometimes due to investment restrictions, sometimes to avoid “early stage” risk. More recently, seasoned restaurant investors from private equity funds have begun targeting much smaller, and in some cases younger, companies. At the same time, institutional funds and pensions, which once invested only indirectly through their private equity fund choices, have begun to appear as direct investors in restaurant concepts.

All general sessions are held in the Grand Horizon Ballroom of Covel Commons.
Our panel includes three seasoned investors from unique capital sources, and an experienced restaurant executive who’s held a leadership role in both startups and more established ventures financed by private equity. You’ll learn from the investors what they and their funds look for in a restaurant investment, what they intend to bring to the relationship besides capital, and why that might matter; and from the operator you’ll learn how such a relationship does (or doesn’t) benefit a growing company.

**Moderator:**
Rod Guinn, Managing Director, FocalPoint Partners, LLC

**Panelists:**
Stuart Frenkiel, Senior Director, Private Equity, PSP Investments
Steve Heeley, Chief Operating Officer, Veggie Grill
Jacob A. Organek, Founder and Partner, Rosser Capital Partners
Christopher Reilly, Co-Founder, KarpReilly LLC

Kevin Reddy is chairman and chief executive officer of Noodles & Company (NASDAQ: NDLS). Reddy joined the company as president in April 2005, was named CEO in May 2006 and chairman in May 2008. He guided the company through a successful initial public offering in June 2013, and provides leadership for more than 425 company- and franchise-owned restaurants in 32 states, as well as the District of Columbia.

Prior to joining Noodles & Company, Kevin held various positions at Chipotle Mexican Grill, including chief operating officer, chief operations officer and restaurant support officer. He was instrumental in designing and building the infrastructure and culture to propel Chipotle to 420 units in 22 states in just seven years.

His professional career began with McDonald’s in 1983, where he started as regional controller, and moved into positions of escalating responsibility, including positions in domestic field management, international staff management, and home office operations.

Under his direction, Noodles & Company has been the recipient of several notable awards and accolades, including the 2013 NRN Menu Masters Award for Best Line Extension as well as their Golden Chain Winner in 2010. Kevin’s leadership has been recognized by Restaurant Business Magazine and Restaurant Finance Monitor, who named him “Entrepreneur of the Year” and “All-Star CEO” respectively in 2014. That same year, he was named to Nation’s Restaurant News’ 2014 Builder List, created to feature people who are taking restaurant brands to the next level.
2:05 – 3:20

Reality Bites

Current Trends – by Steven Goldstein, Partner, The Culinary Edge

Today, more than any other time in our industry’s history, it’s critical to understand the forces that create changes in consumer behavior in and outside of the restaurant industry. The team at The Culinary Edge believes there are market dynamics that drive consumer decision making and the shaping of food trends.

Steven will share his insights on “marketplace change agents,” and their impact on brand and menu innovation. It will change your perspective on restaurant consumers’ needs and the choices they make.

The Guest Journey – How to Really Walk the Talk – by Fred LeFranc, Founding Partner, Results thru Strategy; and Andrew Hunter, Research and Development Chef; Author

Many companies today struggle with sales, guest loyalty and frequency. They claim to provide the best food and service at a great value, yet see declining traffic and sales. The reason is they lack the connection between what they claim to do and reality. We’ll show you how to eliminate the barriers to success.

Fred and Andrew will share their experience in the turn-around work they have done for Steak ’N Shake, Bob’s Big Boy, Boston Market, and more. Clients have experienced double digit sales growth in these projects.

You’ll learn how to:
• Use a holistic diagnostic to identify weak spots in your brand
• How to map out the desired guest journey, and define critical behaviors that create a better outcome
• How to activate the sensory experience for your guests

The Future of Local – by Darren Tristano, Executive Vice President | Technomic, Inc.

Technomic’s new study of the future of local will reveal how consumers define the term “local,” their emotional attitudes toward the trend, and how restaurant operators can take advantage of this and earn credit from the consumer. This first look at the results of the Technomic study will provide insights from a regional consumer perspective, and identify the differences between California consumers compared to other parts of the country. Attendees will also learn which parts of the menu have the greatest opportunity for local ingredient integration, best practices in the use of local on menus, and what suppliers and distributors are doing to increase the supply chain for local product. Attendees will learn where the term local sits today, and take away a perspective on where it’s going and how to prepare for this long-term trend.

3:20 – 3:50

Networking Break

3:50 – 4:35

Harnessing the Power of Influencer Marketing to Drive Restaurant Traffic

Social media has completely revolutionized the way your customers are learning about you. Having a solid community management strategy across all the major platforms is now a given, but how do you take your social media to the next step? Today, what you say about yourself matters much less than what others are saying about you. Less than 50% of customers believe in TV commercials, yet nearly 100% believe in advice from their friends, and 70% trust online opinions. Learn why Influencer Marketing is exploding, and how you can get the most out of this new phenomenon by creating the catchiest social content with the right influencers to spread your message to their millions of followers, driving foot traffic to your stores. This session will include both a presentation and panel discussion featuring 3 top influential marketers.

Moderator:
John Bohan, Founder & CEO Socialtyze & StoryCafe

Panelists:
Gaby Dalkin, Author, Chef, Culinary and Lifestyle Influencer, What’s Gaby Cooking
Gigi Dubois, Professional Celebrity Eater/ Web & YouTube Personality, GiGi Eats Celebrities
Krista Simmons, Culinary Travel Reporter, TV personality, and Digital Tastemaker

4:35 – 5:35

Getting It Right!

What makes a compelling restaurant business? How do some restaurateurs just seem to know what to do and when to do it? And some do it repeatedly! From carefully selecting the next hot chef, finding the right area to locate, or always being on top of the latest trends, our restaurant panel members embody the best of the best. Panel members include Bill Chait, who Los Angeles Magazine says has created the city’s “most impressive portfolio of restaurants in just under six years;” Susan Sarich of SusieCakes, who’s building an exciting multi-unit collection of old-fashioned, from-scratch bakeries which use the finest ingredients and provide employees with a lifestyle they can enjoy; Mike Simms of Simmzy’s Pub, the newest success story in a restaurant dynasty while celebrating all things craft; and legendary restaurateur Bob Spivak of Grill Concepts, who’s new expansion concept, Public School, is capturing the purest essence of a modern gastropub with a chef-driven menu. These four executives can teach us all how to be exceptional. Each individual embodies their own brand of innovation, standing out in front of their competition.

Moderator:
John Hamburger, President, Franchise Times Corporation

Panelists:
Bill Chait, Managing Partner & Chief Executive Officer, Sprout LA {Bestia, Republique, Sotto, Picca, Short Order, Petty Cash Taqueria, Redbird, Short Cake}
Susan Sarich, Founder and Chief Executive Officer, SusieCakes, LLC
Mike Simms, Managing Member, Simms Restaurant Group
Robert Spivak, Co-Founder, President and Chief Executive Officer, Grill Concepts, Inc.; Public School

5:35 – 5:40 pm

Closing Remarks

5:40 – 7pm

Closing Wine Reception
GiGi Dubois is a healthy living nutrition enthusiast and blogger based in Los Angeles. With a unique comedic style and relatable approach, she both educates and entertains her audiences with a weekly blog/vlog, GiGi Eats Celebrities. GiGi’s passion for all things nutrition and fitness blossomed into a full-time focus when she encountered diet-related health problems as a young girl. Since then, she has led an active and healthy lifestyle and is committed to showing others how diet can positively affect their lives. A skilled writer, interviewer, and on-camera personality, GiGi has profiled celebrities such as Giada De Laurentiis, Molly Sims, Michelle Bridges, Denzel Washington and other Hollywood stars. She is frequently called upon for her advice and opinions by nutrition and celebrity-related media outlets. She has a bachelor’s degree in broadcast journalism from the University of Colorado and a master’s degree in nutrition communications from Tufts University.

Stuart Frenkiel is a Senior Director in the Private Equity Group at PSP Investments, one of Canada’s largest pension investment managers. At PSP, Mr. Frenkiel primarily focuses on direct investment opportunities in the consumer products, retail and restaurant sectors. Prior to joining PSP, Mr. Frenkiel worked in the Mergers & Acquisitions Group at UBS Investment Bank and in the Office of Strategic Management at BMO Financial Group. Mr. Frenkiel received a Bachelor of Commerce degree from McGill University, an MBA from the Kellogg School of Management at Northwestern University, and is a CFA Charterholder. Mr. Frenkiel currently sits on the board of directors of Noodles & Company and Ferrara Candy Company, and previously was a board member of QCE Finance LLC (Quiznos).

Steven Goldstein, Partner, The Culinary Edge. With more than 25 years’ experience in the foodservice and consumer packaged goods industries, Mr. Goldstein focuses on client development and management, linking food creativity with business strategy and brand attributes to help deliver sustainable growth. His company provides branding, culinary, and operational solutions for the food and restaurant industry. Mr. Goldstein is a graduate of the Hilton College of Hotel and Restaurant Management at The University of Houston, Texas, and The Culinary Institute of America, Hyde Park, NY.

Anna Graves, Conference Chair; Partner and Co-Leader of the Restaurant, Food & Beverage Industry Group, Pillsbury Winthrop Shaw Pittman LLP (see Message from the Conference Chair for full bio)

Rod Guinn is Managing Director with FocalPoint Partners LLC, a board advisor of FohBoh, Inc., and a director of Anthony’s Coal Fired Pizza. Before FocalPoint, Mr. Guinn led Wells Fargo Foothill’s Restaurant and Hospitality business. Several years before this, he led FleetBoston Financial’s Restaurant, Food & Beverage Group. Mr. Guinn has spoken at numerous industry and capital markets events. He writes an occasional blog on restaurant finance and related topics available on FohBoh and other sites. Mr. Guinn holds a Master’s in Business Administration from the Amos Tuck School of Business Administration, Dartmouth College, and a Bachelor of Arts from the University of New Mexico.

John Bohan is the CEO and founder of StoryCafe Socialtyze, an influencer marketing company that aligns restaurant and food industry brands with the most powerful influencers in social media. He is also the CEO and founder of Socialtyze, a leading social media agency that works with more than 200 top brands, including The Cheesecake Factory, IHOP, Warner Bros., and Kraft. Prior to Socialtyze, John founded and ran several other successful digital marketing companies over his 20-year career.

Bill Chait, Managing Partner & Chief Executive Officer, Sprout LA (Bestia, Republique, Sotto, Picca, Short Order, Petty Cash Taqueria, Redbird, Short Cake) A native Angelino, Bill Chait has been involved in the restaurant industry for more than 25 years during which time he has developed and operated several successful restaurant concepts. Chait is currently the Managing Partner of Sprout LA, in conjunction with his Sprout Partner’s Michael Glick and Aileen Getty. He is also Principal and Managing Partner for Sotto with chef Steve Samson, Picca with chef Josh Drew, Short Order and Short Cake with chef Nancy Silverton, Bestia with chefs Ori Menashe and Genevieve Gergis, Petty Cash and Republique with chefs Walter Manzke and Margarita Manzke, Barrel and Ashes with chefs Rory Herrmann and Tim Hollingsworth, and Redbird with chef Neal Fraser and Managing Partner Amy Knoll. He is currently working on the new Otium Restaurant with chef Tim Hollingsworth and and their partner, Eli Broad, adjacent to the new Broad Contemporary Art museum on Grand Avenue.


Gaby Dalkin is a cookbook author, private chef and food/lifestyle writer based in Los Angeles. Her food blog, What’s Gaby Cooking, is a playful, fun, inspiring, sun-soaked destination for everyone who aspires to live the California Girl life. “At What’s Gaby Cooking we’re healthy, fit and adventurous, but we’re also real. We love a juice cleanse, but we also like the occasional grilled cheese. We’re big on finding balance, because whether you’re cooking, cocktailing or traveling, it all benefits from a creative, can-do mentality that teeters on the edge of planned and spontaneous, practical and a little bit quirky!”

Anna Graves, Conference Chair; Partner and Co-Leader of the Restaurant, Food & Beverage Industry Group, Pillsbury Winthrop Shaw Pittman LLP (see Message from the Conference Chair for full bio)
John Hamburger is the Founder and President of Franchise Times Corp., a national publisher of franchising and finance information. The company publishes Franchise Times Magazine, a national franchise industry trade journal; the Restaurant Finance Monitor, a monthly financial newsletter which covers the capital markets in the restaurant industry; and Foodservice News, a monthly newspaper for independent foodservice and restaurant operators in the Upper Midwest. He also produces a number of conferences including The Restaurant Finance & Development Conference and the Franchise Finance & Growth Conference. John has more than 35 years of experience in franchising and finance, and previously served as chief financial officer of a public restaurant chain and a CPA in a national accounting firm. He is a frequent speaker at restaurant and franchise industry events on finance and development topics. John attended St. John's University in Collegeville, Minnesota and the University of St. Thomas in St. Paul, Minnesota, where he graduated with a BA in accounting in 1977.

Steve Heeley is Chief Operating Officer of Veggie Grill. Veggie Grill is the leading innovative, Veggie-Centric fast-casual brand with 28 restaurants and growing. Steve is a 19-year veteran of the fast casual space. Prior to Veggie Grill, Steve was President and CEO of Earl of Sandwich, LLC, a high-volume fast casual sandwich brand. Steve led the company's 30% annual growth through-out the US and internationally. Mr. Heeley has extensive experience in leading several well-known fast casual growth brands. Previously, he was COO of Au Bon Pain café bakery, led operations for LA based Coffee Bean and Tea Leaf, and was COO of Baja Fresh Mexican Grill, leading their nationwide growth to over 300 units and a subsequent sale to Wendy’s. Earlier, Heeley was President and CEO of the San Francisco based SiMCO Group, a multi-unit restaurant and retail operator. Steve started his professional career at the El Toro in 1983. www.veggiegrill.com

Andrew Hunter is a research and development chef, author, and television personality. He has appeared on numerous shows from Lifetime's competition series, Supermarket Superstar to CNBC's Restaurant Startup and HSN Today on HSN. Chef Andrew works in various segments of the industry including fine and casual dining, and research and development. He develops retail and consumer food products for companies including Wolfgang Puck Worldwide, Niman Ranch, Martha Stewart, and Kikkoman. He also develops menus and operating systems for numerous fast casual and casual dining restaurant groups. He serves as both Executive Chef for Niman Ranch and Foodservice and Industrial Chef for Kikkoman. As former vice president of culinary development for Wolfgang Puck, Chef Andrew was responsible for translating Wolfgang’s signature fine dining vision into profitable fast casual menu concepts. Prior to joining Wolfgang Puck, Andrew managed the culinary operations system-wide for Darden Restaurants’, The Olive Garden. Andrew is the chef author, with cardiologist Dr. Steven Schnur, of The Reality Diet, published by Penguin in 2006. Chef Andrew earned an AOS in culinary arts from the Culinary Institute of America, a BA in culinary history from New College, and an MA in museum studies from San Francisco State University.

Chris Keating, Vice President/Market Leader, Penton Food and Restaurant. Chris joined Nation’s Restaurant News in 2008 after 20 years in technology media, and currently manages NRN, Restaurant Hospitality, Food Management, Supermarket News, and the MUFSO Conference. In the tech market, Chris was publisher of titles in the computer security, database, and call center markets. After two decades, he realized that the restaurant industry is more fun, better tasting, and more socially adjusted than Silicon Valley. In 2007, he was a contestant on Who Wants to be a Millionaire, where he was stymied by a food question.

Srinivas Kumar, Chief Executive Officer, CraftWorks Restaurants & Breweries. As Chief Executive Officer, Srinivas brings more than two decades of industry leadership experience to CraftWorks Restaurants and Breweries. A veteran of franchising and restaurant operations with major U.S. brands, he joined the CraftWorks leadership team in January 2014. Prior to CraftWorks, Kumar most recently served as head of Pearle Vision, a premium optical retail chain and franchise owned by Luxottica. There, he led the brand to strong positive growth with double-digit EBITDA growth for the franchised system. Kumar also worked with other leading brands, including Dunkin’ Brands. At Dunkin’, Kumar held several positions, including Chief Brand Officer of Baskin-Robbins Worldwide where he oversaw international expansion and branding efforts for the popular ice cream brand. During his tenure, both Baskin-Robbins and Dunkin’ Donuts experienced a complete turnaround in Europe moving from loss-to-profit and Baskin-Robbins underwent successful revitalization in the U.S. Early in his career, Kumar held a variety of sales and marketing roles in Bangalore, India. He transitioned to the food service industry as the operator of the Baskin-Robbins franchise in the Middle East where he grew the business to become the largest Baskin-Robbins licensee and the largest quick service restaurant chain in the Middle East.

Jean-Paul Kyrillos is President of The Daily Meal. The mega-site covers all things food and drink, delivering multimedia food journalism in real-time. Currently the fastest growing food and drink lifestyle site of all time - reaching 14MM unique visitors a month (131% year over year growth!). The Daily Meal’s mission is to create an open source and holistic environment covering every aspect of the culinary lifestyle from recipes to restaurants to travel, making it accessible for all consumers. The Daily Meal publishes 200 stories a day.

Fred LeFranc, Founder/CEO, Results Thru Strategy, Inc. Mr. LeFranc's consultancy helps companies, private equity, owners and C-level executives identify and implement strategies that deliver long-term sustainable success. He aids executives to modify their behavior and hone in on their natural strengths. Mr. LeFranc has served on the boards of restaurant and technology companies for over 30 years. Previously, he was President and COO of The Ruby Restaurant Group. Before that, he served as CEO, President and director of LT Acquisition Corp., owners of Louise's Trattoria.
Anton Nicholas, Managing Director, ICR. Anton is head of ICR’s retail, consumer, industrials and clean-tech corporate communications industry groups and co-head of the firm’s special situations group. With almost 20 years of experience, Anton counsels directors and executives on high-level communication strategy and execution with the financial community, media and other key constituents. Anton works with clients such as Noodles, Massage Envy, and Denny’s to implement long-term strategic communications programs and has advised on recent IPOs such as El Pollo Loco, The Habit and Zoës Kitchen. He also has significant special situations experience, having advised on a range of assignments including: M&A activity, IPOs, shareholder activism, litigation support, bankruptcy, product recall, industrial accidents, malfeasance, employee violence and regulator investigations. Before joining ICR, Anton was a Managing Director and Partner at Sloane & Company and previously CEO of Financial Dynamics International’s (now FTI Consulting) North American operations. Before being named CEO, he was a Partner and Managing Director of the firm’s international special assignments group.

Jacob A. Organek is a Founder and Partner of Rosser Capital Partners, a Greenwich, CT based investment firm focused on identifying emerging consumer-facing brands, predominantly within restaurants and retail. Prior to founding Rosser Capital Partners, he was a managing director of Bruckmann, Rosser, Sherrill & Co. (“BRS”) where he worked since 2003. While at BRS, Jacob was responsible for evaluating, executing, monitoring and exiting numerous consumer transactions including AMF Bowling, The Marshall Retail Group, Corner Bakery Café, Bravo Brio Restaurant Group, Logan’s Roadhouse and Ruth’s Hospitality Group. Previously, he worked at Lehman Brothers in the Financial Sponsors Group. Jacob received a bachelor of Business Administration from the University of Michigan. Jacob currently serves on the board of directors of Barbeca Holdings, Hickory Tavern Holdings and PetPeople Holdings. He was formerly a director of Logan’s Roadhouse, Il Fornaio / Corner Bakery Café and The Marshall Retail Group.

Christopher Reilly co-founded KarpReilly, LLC in 2006 and has more than 25 years of private equity investing experience. He is a former partner of Apax Partners, L.P. where he headed the US Retail and Consumer Group from 2005 – 2006 and was a member of the US Investment and Operating Committees. From 1990 – 2005, he was a partner of Saunders Karp & Megru (SKM) where he was a member of the Investment and Management Committees. Chris began his career at Bankers Trust in 1986, and later joined Morgan Stanley’s Merchant Banking Department. He holds a BS in Accounting from Providence College and an MBA in Finance from New York University’s Leonard N. Stern School of Business. Chris is vice chair and member of the Board of Trustees at Providence College and is also Chair of the Finance Committee. He is currently on the boards of Habit Burger Grill, Norcraft, Patri’s, Sprinkles, Adrianna Papell and Burger Lounge. His past board memberships include Bob’s Discount Furniture, Targus, Performance Bike, Marie Callendar’s and Mimi’s Café.

Anton Nicholas, Managing Director, ICR. Anton is head of ICR’s retail, consumer, industrials and clean-tech corporate communications industry groups and co-head of the firm’s special situations group. With almost 20 years of experience, Anton counsels directors and executives on high-level communication strategy and execution with the financial community, media and other key constituents. Anton works with clients such as Noodles, Massage Envy, and Denny’s to implement long-term strategic communications programs and has advised on recent IPOs such as El Pollo Loco, The Habit and Zoës Kitchen. He also has significant special situations experience, having advised on a range of assignments including: M&A activity, IPOs, shareholder activism, litigation support, bankruptcy, product recall, industrial accidents, malfeasance, employee violence and regulator investigations. Before joining ICR, Anton was a Managing Director and Partner at Sloane & Company and previously CEO of Financial Dynamics International’s (now FTI Consulting) North American operations. Before being named CEO, he was a Partner and Managing Director of the firm’s international special assignments group.

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Mike Simms, Managing Member, Simms Restaurant Group. Mike knew from an early age that he would foray into the world of hospitality. He and his brother grew up running around the kitchen at French Market in West Hollywood and The Kettle in Manhattan Beach – his father’s and grandfather’s restaurants. After graduating from Cornell’s prestigious Hotel School, Mike moved to the Napa Valley and managed Tra Vigne restaurant, where he fully immersed himself into food. In trying his hand at home brewing, traveling to the world’s best wine regions, Mike came to realize his passion for beer and wine. In 2005, he returned to Southern California, compelled to connect local restaurants to surrounding farms, breweries, and wineries. He joined forces with his father Tom and brother Chris to form The Simms Restaurant Group. Restaurants include: Tin Roof Bistro (2009), Simmzy’s Manhattan Beach (2009), Manhattan Beach Post (2011) Simmzy’s Long Beach (2012), Fishing With Dynamite (2013). Now in 2015 Mike has opened his third Simmzy’s in Burbank, with another one coming soon to Venice, Huntington Beach, and San Clemente. Whether it’s teaching servers about new styles of beer, encouraging cooks to use new techniques, or honing his own palate with an Introductory Sommelier Certificate, Mike is a firm believer in empowerment through education. In the same vein, Mike prides himself on promoting from within and truly believes in putting people first.

Robert Spivak, is Co-Founder, President and Chief Executive Officer, for Grill Concepts, Inc., a company that was formed in 1984. Grill Concepts, Inc. currently operates 19 Daily Grill restaurants, 7 The Grill on the Alley restaurants and 5 Gastro Pubs named “Public School” with 3 more to be opened later in 2015. Bob is a 50-year veteran of the restaurant and food industry, comes from a family that ran restaurants in Los Angeles from 1946 to 1972. In the early 1980s, Bob and his partners, Mike Weinstock & Richard Shapiro opened the highly successful Beverly Hills restaurant, The Grill on the Alley, The Grill which was inducted into the Fine Dining Hall of Fame by Nation’s Restaurant News in 1995. The Grill is the upscale model for the Daily Grill. Most recently they opened the very successful “Public School” Gastropub concept. He was selected, by the California Restaurant Association, as their 2006/2007 California Restaurateur of the year. Bob lives with his wife, Leslie, in Brentwood, California. They have four children, and 10 grandchildren.

Darren Tristano is an executive vice president at Technomic, Inc., and is focused on expanding the foodservice industry knowledge base and sharing this intelligence with operators, suppliers and other key players. Over the past 20 years, he’s overseen the growth of Technomic’s Information Services division. On Technomic’s consulting side, Darren leads the company’s restaurant practice, providing operator clients with actionable findings and insights. Drawing on this experience, Darren also puts Technomic’s research findings into context, speaking frequently to the media and at industry conferences.

Clarice Turner, SVP, leads Starbucks’ Food and Evenings programs for the Americas group. She has diverse experience in executive management, previously serving as president & COO of Papa Murphy’s Take ‘N’ Bake Pizza, and in various domestic and international leadership positions at Pepsico and Yum! Brands. Prior to her work in the food and beverage industry, she served in roles incubating new businesses ventures, sales and marketing, and finance/controller. Clarice is an active leader with several private, advisory and non-profit organizations including the Culinary Institute of America Board of Fellows, National Restaurant Association board of directors, and Advisory Board for the Washington State University School of Business. She earned her MBA and undergraduate degrees from San Francisco State University, and also studied at Fudan University in Shanghai, China.

Edward Valle has served as Chief Marketing Officer of El Pollo Loco since October 2011. From 2009 to 2010, he was Chief Marketing Strategist for Choice Hotels International, responsible for brand strategy, advertising, marketing, media, promotional and loyalty initiatives. From 2005 to 2009, Mr. Valle was Vice President of Marketing at the Panera Bread Company. Prior to that, he held marketing leadership positions at Dunkin’ Donuts, Subway Restaurants and Diageo. Mr. Valle holds an MBA from Fordham University and a bachelor’s degree in operations and logistics management from Michigan State University.
Gallagher Hospitality and Restaurant Group is a leading practice within Gallagher Benefit Services. We understand that restaurants seeking to provide attractive, yet cost-effective, employee benefit programs face complex issues, including a highly diverse workforce incorporating hourly workers, salaried managers, trainers, corporate staff, and senior executives; a significant number of part-time workers, unionized employees, or non-union employees; decentralization—making it difficult to process enrollments, provide Internet access and in general, communicate with employees; high turnover and the need for benchmarking tools to stay competitive and retain employees; assistance outside of normal corporate office hours; and the need for easy-to-understand communication materials to keep employees informed. Addressing these difficult issues and implementing smart solutions can be time consuming for a busy restaurant leadership team. That is why so many restaurants turn to GBS. We provide the full breadth of expertise in employee benefits, compensation, property casualty, and risk management that meet the ever-changing needs of our current and prospective clients.

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Morgan Stanley is a global financial services firm that maintains significant market positions in each of its business segments: Institutional Securities, Wealth Management and Investment Management. The Company, through its subsidiaries and affiliates, provides its products and services to a large and diversified group of clients and customers, including corporations, governments, financial institutions and individuals. A summary of the activities of each of the segments follows:

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Moss Adams is one of the largest accounting and consulting firms in the nation. Together with its affiliates, the firm provides insight and expertise integral to its clients’ success, serving public, private, and not-for-profit enterprises across the nation and in a wide range of industries. Moss Adams LLP is a national leader in assurance, tax, consulting, risk management, transaction, and wealth services. Moss Adams Wealth Advisors LLC provides investment management, personal financial planning, and insurance strategies to help clients build and preserve their wealth. Moss Adams Capital LLC offers strategic advisory and investment banking services, helping clients create greater value in their business.

For more than 40 years, National’s Restaurant News has served the information needs of foodservice professionals. Today, offering integrated media solutions for changing times, NRN is the media brand over 500,000 professionals turn to every month to help them tackle the challenges facing the foodservice industry. For operators, NRN provides a one-stop resource for complete industry coverage in whatever formats they prefer, whether print, digital, or web-based. For suppliers, NRN’s audience-rich portfolio of print, digital, and live-event products provides the reach, access, and flexibility needed to open doors and grow businesses.

Pillsbury Winthrop Shaw Pittman LLP is a full-service law firm which offers depth of knowledge in core industry sectors, including restaurant, food & beverage; wine, beer & spirits; and consumer & retail. We deliver practice strength to restaurant operating companies and their investors in mergers and acquisitions, gift card law, ABC law, meal and rest break litigation, trademark and trade dress protection, brand licensing, franchising, consumer class action defense, IPOs, debt financing, public and private equity transactions, insurance coverage, and executive compensation and benefits. Our practice is organized to offer our clients a maximum return on the firm’s collective knowledge about our clients’ businesses, industries, and legal issues. We work in multidisciplinary teams that allow us to anticipate trends and bring a 360-degree perspective to complex business and legal issues—helping clients to take greater advantage of new opportunities and better mitigate risk.

Altametrics is an innovative market leading software company based in Costa Mesa, CA. The company’s products are used throughout the world by leading retail, restaurant and petroleum companies. Clients like McDonald’s, Chipotle, Taco Bell, Wendy’s, Burger King, Friendly’s, and thousands of others have deployed Altametrics solutions around the world. Our software is the “behind the scenes” secret that enables our Clients to serve their customers with the highest and best customer service and profitability. If you have ever filled your car with gas or eaten at a restaurant, chances are your experience was made better by Altametrics.

Bank of America Merrill Lynch

Working with Bank of America Merrill Lynch, you have access to the comprehensive integrated capabilities of one of the world’s largest financial institutions which prides itself on being connected. Our Restaurant Finance Group has served up creative, forward-thinking solutions to operating companies, franchisors and franchisees since 1984—from advising on the capital structure of acquisitions to remodeling facilities, providing specialized knowledge across a broad spectrum of products and services and investing billions of dollars in the restaurant space along the way. Leveraging our extensive experience and expertise, we work with you to identify the connections between how you can raise, manage and protect capital and achieve your strategic objectives both globally and domestically. Our client relationships are day-to-day, ongoing partnerships customized to help you be successful over the long term.

Barfresh Food Group Inc

Barfresh provides premeasured—prepackaged-single portions of ready-to-blend “better for you” beverages. Our juice-bar quality Smoothies are made with real fruit, low-fat frozen yogurt or sorbet, fruit juice, and ice – all you need is the blender. Our Shakes and Frappes are created with the highest quality ingredients. We bring a refreshing Barfresh experience to multinational food outlets worldwide.
CapitalSpring provides creative capital to experienced management teams and operators to support growth, refinancing, development and other special situations. CapitalSpring typically invests $5M to $50M in the form of mezzanine debt, passive equity and creative capital.

Elevate My Brand

Elevate My Brand (EMB) is a boutique marketing company dedicated to elevating food, wine, and retail brands globally. Our purpose is to bring new passions and flavors into people’s lives through food, wine, and fashion. We at EMB dedicate ourselves to this goal by helping new and existing brands in these markets develop and implement full circle marketing plans to successfully take their company or product to the next level. Whether you are re-branding, taking your first steps into online marketing and social media, launching a new brand or product, or are in need of high-level brand strategy, EMB has a team that’s hungry to help.

FocalPoint

FocalPoint is an investment banking firm that specializes in mergers and acquisitions, private placements (both debt and equity), and financial restructurings. The firm’s primary focus is on middle-market companies. Recent restaurant clients include Fuddrucker’s, John’s Incredible Pizza, Round Table Pizza, and Daphne’s. For more information visit focalpointllc.com.

ICR

Established in 1998, ICR partners with companies to develop and execute strategic communications programs that achieve business goals, build credibility, and enhance the long-term value of the enterprise. The firm’s highly differentiated service model, which pairs capital markets veterans with senior communications professionals, brings deep sector knowledge and relationships to clients in more than 20 industries. Today, ICR is one of the largest and most experienced independent advisory firms in North America, maintaining offices in Boston, Connecticut, Los Angeles, New York, San Francisco and Beijing.

Learn more at www.icrinc.com. Follow us on Twitter at @ICRPR.

Piper Jaffray

Piper Jaffray is a leading investment bank and asset management firm serving clients in the U.S. and internationally. Our proven advisory teams combine deep product and sector expertise with ready access to global capital. Founded in 1895, the firm is headquartered in Minneapolis with offices across the United States and in Hong Kong, London, and Zurich.

Ste Michelle Wine Estates

Ste Michelle Wine Estates, located outside of Seattle, has a long and distinguished history that dates back to 1934. Wines under the Ste Michelle label were first introduced in 1967, and since that time the company has expanded its vineyard holdings to more than 3,700 acres in Washington and California. Today the Washington portfolio includes Chateau Ste Michelle, Columbia Crest, Northstar, Spring Valley Vineyards, Col Solare, Domaine Ste Michelle, Red Diamond, Snoqualmie and 14 Hands. The company also owns Stag’s Leap Wine Cellars (with Italy’s Antinori family), Conn Creek, and Villa Mt. Eden in the Napa Valley of California, and Erath, in Dundee, Ore. Ste Michelle Wine Estates became the exclusive U.S. importer for the acclaimed Antinori wine company of Italy and Chile’s Haras wines in 2006, for Champagne Nicolas Feuillatte of France in 2009, and for New Zealand’s Villa Maria Estate in 2010. (smwe.com)

Story Cafe

It’s not what a brand says about itself that matters; it’s what other people say. StoryCafe matches restaurant and food industry brands with the most powerful influencers in social media to create authentic, relevant, and shareable content that connects with consumers and drives real business results. We are a sister company to Socialtyze, a leading social media agency that works with more than 200 top brands, including The Cheesecake Factory, IHOP, Warner Bros., and Kraft Foods. www.storycafe.com

Technomic, Inc. is the most recognized and experienced marketing research and management consulting firm serving the foodservice industry. Founded in 1966, the company has a broad and diverse base of domestic and international clients, including major manufacturing, distribution, and supermarket companies, as well as chain restaurants and other foodservice operators, and related trade associations. Technomic helps clients capitalize on growth opportunities and meet market challenges by providing perspectives and intelligence on a broad scope of topics.

The Culinary Edge

Headquartered in San Francisco, The Culinary Edge is a consulting firm specializing in developing and implementing strategic branding, culinary, and operational solutions for the food and restaurant industry. Their goal is to improve the profitability and sustainable growth opportunities of clients, from multi-unit international chains to start-up entrepreneurs.
Advisory Board

Daryl Ansel, Director of Food & Beverage, UCLA Housing & Hospitality. Restaurant industry veteran Daryl Ansel brings more than two decades of experience to his duties as Director of Food and Beverage for UCLA Housing and Hospitality Services. His experience includes operations and finance in executive level positions at a diverse and prestigious group of food service companies, including the Starr Restaurant Organization of Philadelphia, Los Angeles-based Grill Concepts (NASDAQ: GRIL), and Universal Studios Hollywood. Mr. Ansel holds a Bachelor of Arts in Economics from the University of California at Berkeley and a Master’s in Hospitality Management from Cornell University’s School of Hotel Administration.

Alyssa Balam, Senior, Assurance Services, Ernst & Young, LLP Alyssa is a client-serving professional in the assurance practice with Ernst & Young LLP, who provides financial reporting services, and specializes in the restaurant and hospitality industry. She sits on the steering committee of the Professional Women’s Network (PWN) within the firm and is a member of the American Institute of Certified Public Accountants (AICPA). Her clients have included DineEquity, franchisor of IHOP and Applebee’s, Panda Restaurant Group, and Red Bull. She earned her BS in Accountancy at California State University, Northridge.

Lynda Boyer, Vice President, CBRE, Inc. Since 1982, Ms. Boyer has been a trusted advisor to restaurateurs across the country. She has successfully represented restaurant owners, operators, chefs, developers, landlords, shopping centers, and investors in the acquisition, disposition, development, and leasing of restaurant-related real estate. Ms. Boyer received her undergraduate degree in Finance from the Haas Business School at the University of California, Berkeley. She also worked as a professional development officer for UCLA, raising unrestricted funds for the university for 15 years. Ms. Boyer is also a member of the C5 Youth Foundation Board of Directors.

Kevin Burke, Managing Partner and Founder, Trinity Capital LLC. Mr. Burke joined Franchise Mortgage Acceptance Company, the nation’s largest franchise lender, in 1997 after executive roles at investment banking firms in New York. In 2000, he formed Trinity Capital LLC, a Los Angeles-based investment banking and restructuring boutique. An acknowledged leader in the U.S. restaurant industry, Trinity has engaged in approximately $20 billion of transactions since it began. The firm has served as an investment banker or restructuring advisor for Taco Bell, Burger King, Dunkin Brands, Yum! Brands, Red Robin Gourmet Burgers, Metromedia Restaurant Group, Farmland Industries, Schlotzsky’s, El Pollo Loco, Quiznos, Church’s Chicken, and many others.

Karla Cameron

Huntley Castner currently serves as the strategic chief financial officer of Lemonade Restaurant Group. Prior to Lemonade, Huntley served as chief executive officer and concurrently as chief operating officer and chief financial officer of Yogurtland Franchising, Inc. over the course of a three-year term. Prior to his role at Yogurtland, Huntley was a member of Panda Restaurant Group’s Senior Team, where he served as the company’s vice president of Strategy & Finance for six years. Prior to joining Panda, Huntley worked at several strategy consulting firms including Swander Pace & Company, Kurt Salmon Associates, and LEK Consulting over the course of twelve years. Huntley also founded and operated the San Francisco-based WA-HA-KA Mexican Grill and Baton Rouge Cajun Roadhouse restaurants during the 1990s. He received the Phi Beta Kappa academic honor from Stanford University in 1985, and a master's degree in business from the Anderson School of Management at UCLA in 1989. He lives in Manhattan Beach, California with his wife and two daughters.

Damon S. Chandik, Managing Director, Head of Restaurant Investment Banking, Piper Jaffray & Co. Mr. Chandik is a managing director at Piper Jaffray and is head of the firm’s Restaurant Group. He is focused on providing investment banking and mergers and acquisitions advisory services to restaurant companies. He has over 18 years of investment banking experience, including public equity and debt offerings, private capital raising, mergers, acquisitions, leveraged buyouts, and recapitalizations.

Kurt M. Cross is an Executive Director at Morgan Stanley, and is the Head of the firm’s Restaurant Investment Banking practice. Based in Los Angeles, Mr. Cross provides investment banking and mergers & acquisitions advisory services to restaurant companies. He has over 10 years of Investment Banking transaction experience across initial public offerings, mergers, acquisitions, leveraged buyouts and recapitalizations. Relevant transactions include the IPOs of Shake Shack, El Pollo Loco, Noodles & Company, the recapitalization of Jack in the Box and advising on the privatization of CKE restaurants.

David E. Goldstein David joined Sharky’s Woodfired Mexican Grill as Vice President and Chief Operating Officer in 2007. David brings his extensive background in the fast casual sector to Sharky’s. David is a restaurant industry veteran with more than twenty-five years of progressive management, operations and R&D experience. David has been involved at the executive level in the expansion of three chain restaurants with over 200 locations nationwide.
Sarah Grover, chief brand and strategy officer of Barfresh, a developer, manufacturer and distributor of ready-to-blend beverages. Sarah has more than 25 years’ experience in the restaurant and hospitality industry. Most recently, she was chief concept officer and EVP of California Pizza Kitchen, where she was responsible for driving overall brand strategy, product innovation, marketing communications, consumer insights and menu optimization. Sarah has been recognized as one of the “Marketing 100” by Advertising Age.

Justine Hunter, CPA, Business Assurance Partner, Moss Adams LLP. Ms. Hunter has practiced public accounting since 1984, working closely with private equity firms and providing acquisition and due diligence services, as well as audits and reviews, financial structuring, complex equity structuring, and tax earn-outs. She has participated in more than 15 public fundings for her clients, including IPOs, public debt transactions and restructurings, and public merger transactions. At Moss Adams, she maintains a large roster of prominent restaurant clients, including The Habit Burger Grill, Grill Concepts, SoCal Pizza, Lazy Dog Cafe, Sprinkles Cupcakes, and California Pizza Kitchen. Prior to Moss Adams, Ms. Hunter focused on the restaurant industry at Ernst & Young.

Fred LeFranc, Founder/CEO, Results Thru Strategy, Inc. (See Conference Speakers for full bio)

Janet Lowder, President, Restaurant Management Services. Ms. Lowder heads a Los Angeles-based restaurant and foodservice consulting firm, specializing in strategic planning, business valuations, site analysis, market research, concept evaluations, litigation consulting, and expert witness testimony.

During the past 24 years, Ms. Lowder has been a UCLA Extension instructor teaching courses such as The Restaurant Industry – Survey of Operations & Management, Starting Your Own Restaurant, and Restaurant Controls for Profit Improvement. Ms. Lowder received a BS in accounting from USC and studied restaurant management at the University of Hawaii.

Dian Melius, Western Regional Sales Director, Penton Media. Ms. Melius is Western Regional Sales Director for Penton’s Restaurant Group. She works with West Coast-based food and equipment manufacturers to create integrated print and digital promotional programs to reach commercial and noncommercial food service decision makers. She has more than 15 years of experience in foodservice marketing and media sales. She earned a BA in journalism from the University of Minnesota and an MBA from the University of St. Thomas.

Fred LeFranc, Founder/CEO, Results Thru Strategy, Inc. (See Conference Speakers for full bio)

Lauralynn Rogers is Director of the Internal Audit function for DineEquity, franchisor of IHOP and Applebee's. She is responsible for internal control and process improvement, the franchise sales reporting program, and Sarbanes-Oxley compliance. Ms. Rogers makes regular presentations on audit and internal control matters to the Audit & Finance Committee of the DineEquity Board of Directors.

Teresa Siriani, Industry People Expert. Ms. Siriani is passionately devoted to the people of our industry and to ensuring “No Kid Hungry” becomes a reality. A proud graduate of UCLA, Ms. Siriani has had the pleasure of being in leadership positions at Restaurants Unlimited, Peasant restaurants, Wolfgang Puck Food Company and People Report. Today she works with organizations to improve their employee engagement and devotes herself to Share Our Strength, the nation’s leading anti-hunger organization. She serves on the board for Share Our Strength’s Dine Out for No Kid Hungry and serves as chair for Taste of the Nation – Laguna Beach. Teresa knows that together we can end childhood hunger!

Darren Tristano, executive vice president, Technomic, Inc. (see conference speakers for full bio)
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