





# INSIGHT

1st QUARTER 2024

## INSIDE THIS ISSUE

Letter from President

Stars for Heroes

Committee Reports



*Hardee's*<sup>TM</sup>  
**GOODNESS  
IN THE MAKING**



# TWO STARS, ONE AMAZING PARTNERSHIP





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## About the IHFA

IHFA was founded in 1997 to provide a unified voice for Hardee's® franchisees. While serving as a resource for franchisees of all sizes and locations, IHFA provides input and feedback to Hardee's® Foods Systems. Today the IHFA provides input into Hardee's® operational decision-making, including the successful launch of the Thickburger® in 2003.

## Calendar of Events

2024 IHFA Convention & Tradeshow  
September 29 - October 3

WINTER 2024

IHFA INSIGHT - A Publication for IHFA Franchisees & Associates

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The Independent Hardee's®  
Franchisee Association

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# THE PRESIDENT'S INSIGHT

Greetings IHFA Membership,

In 2023 the IHFA worked diligently to establish better communications, trust, and information sharing with CKE, all while the Brand was incorporating a new CEO, CMO, and CFO within the system. *Functionally*, the IHFA Board worked last year to improve food, training, and marketing (and proudly we've seen big strides in each of these areas today).

*Philosophically*, our mission with CKE Leadership was a bit more challenging, as we worked to ensure their team fully understood where the franchisee community stands **financially**. More importantly, we've worked to influence CKE in incorporating "franchisee financial health" as a key component within their decisions now. I, among several others on the IHFA Board, count this as a major step forward for the brand.

Evidence of our progress with the Brand can be seen in the following, where CKE is:

- Developing a **financing program** for new ovens
- No longer leading our meetings with remodel mandates & requirements
- **Sharing company unit financials** statements with the Board, and soon even more broadly
- Acknowledging the need to **fix the business economics** to entice franchisees to invest
- **Owning their internal mistakes** quickly and making course corrections to fix them

One year ago, I wrote about the IHFA's simplified formula for improving the Brand's future: (a) Improved Consumer Perceptions + (b) Improved Operations = (c) Improved Financial Results

Today, twelve months later we are *starting* to see some of the seeds that were planted in 2023 begin to sprout, via strong same store sales growth in Q4 2023, and most importantly, traffic growth. Research points to elements of our marketing efforts strongly resonating with guests as we shift to more cost efficient and targeted digital advertising. We're also discussing more long-range marketing calendar plans as opposed to the recent past of working strenuously to figure out next quarter.



**Frank Heath, Jr.**  
**Atlanta, GA**

Turning our attention forward, our next big challenge as a Brand involves achieving operational **CONSISTENCY**.

In January 2024, CKE had our parent company (Roark) present the results of their deep-dive exhaustive study into the Hardee's Brand. The short version is essentially this: (a) customers love our food when we get it right; (b) we get it right at breakfast more than any other daypart; and (c) it's a crapshoot for the consumer on us getting it right anytime after breakfast. Basically, we tend to be our own worst enemies because we're not consistently clean, fast, accurate or hot (foodwise).

I am now fairly confident that we as a Brand will have the marketing and products to entice customers to try Hardee's again. As such, our mandate as a franchise system is to ensure that we all do our parts to close the gaps between our best and our worst. Our ability to maniacally focus on closing these gaps is the greatest determining factor on having 20+% positive sales growth or not.

I firmly believe that growth is there before us and is attainable – we just need to collectively roll up our sleeves to go and claim it.

Sincerely,

A handwritten signature in black ink, appearing to read "Frank Heath, Jr.", written in a cursive style.

Frank Heath, Jr.  
IHFA President

# STARS FOR HEROES UPDATE

## TIMING WILL BE AS FOLLOWS:

- a. Local Charity Submission to be sent out in mid-February for submission by February 29<sup>th</sup>, 2024.
- b. Any new local recipients need to be submitted by March 8<sup>th</sup>.
- c. POP kits arrive with Window 3 POP kits by April 26<sup>th</sup>.
- d. System Comms announcing the campaign on May 9<sup>th</sup>
- e. Campaign runs Monday 5/27 – Thursday 7/4.

### 1) Call to action featuring the “Why” provided by USA Cares

Intro Message of the why.

3 week refreshes of the why throughout campaign.

Example of all the folks from 2023 that were helped reside by state. Letters from veterans who have been helped and what that means. Documentation of facts of how many were requested and how many were not fulfilled because of lack of funds.

### 2) Working with KDM on POP kit elements

We would like to include a quantity of tear off (Square) Stars for restaurants to use for decorations or recognition for first 500 donations.

### 3) CKE Communications team to work with CKE data management to set up results dashboard and send out updates throughout the campaign.

### 4) Alignment for Hardee’s on one National Charity for 2024 – USA Cares

### 5) Recognize and reward units that raise a minimum of \$2,500 with crew prizes.

We should have enough inventory of SFH logoed draw string bags from last years to award to qualifying units.’

### 6) Aramark will be donating T-shirts to top 10 restaurants as we have done in the past.

### 7) Top 3 RGM and guest will be awarded trip to Las Vegas IHFA convention.

CKE will pay for Hotel and travel. IHFA will cover registration fees.





# USA CARES

USA Cares is humbled and grateful for the unwavering support of IHFA and CKE Restaurants. Thanks in large part to the money raised through Stars for Heroes, USA Cares provided assistance to 924 veteran families caring for a total of 1,237 children in 2023. The ability to support veterans and their families during their most critical times of need not only changed lives, but likely saved some.

We want you to know what your support means to our veterans, so we encourage you to visit [usacares.org/client-stories/](http://usacares.org/client-stories/) to read real client testimonials. There you can meet Air Force veteran Liam Duncan who made a donation to USA Cares just one month after he was assisted to “help the next veteran who needs it.” Or read the story of Army veteran Roselyn Young, who called more than 50 organizations before USA Cares stepped in to save her family from eviction.

There are thousands of veterans and their families just like Liam and Roselyn. Sadly, funding limits just how many of them we can reach. If you know an individual or organization that is passionate about helping veteran families, please ask them to make a donation today.

We can't wait to kickoff this year's Stars for Heroes campaign! Together, we are making a meaningful impact on the lives of our military community. Thank you for standing with us in our mission.



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# COMMITTEE UPDATES

## OPERATIONS COMMITTEE UPDATE

*Sam Munger – Operations Co-Chair; Dave Bowar – Operations Co-chair*

Before we take a look forward at the priorities for the New Year, we want to take a moment to recap a number of major accomplishments in Operations from 2023.

The biggest initiative from 2023 was the transition to the Optimized menu over the summer. This transitioned drastically cut our SKUs, simplified our builds and decreased the size of our menu to allow for more effective training and to minimize the steps in the restaurant. As a result of this change, we are seeing increased retention and will continue to see our speed improve through simpler operations. The Ops committee is extremely proud to have had a seat at the table throughout the Optimized menu transition. Many committee members assisted in testing as well as provided valuable feedback to the CKE team as we transitioned from the old menu to the new.

Another major accomplishment is the rollout of the Winston cabinets. This piece of equipment is another step toward improving the efficiency in our kitchens to better position our teams to execute great QSC. The Winston rollout is a perfect example of Operations and Marketing working together to ensure our teams have the proper equipment in place prior to the rollout of successfully test Chicken Tender Platter later this spring.

In addition to those accomplishments, CKE currently has 3 tests stood up that are focused on improving the quality of our products, reducing prep time and improving our speed of service. Those three tests include:

- 1) An improved chicken tender spec, to help reduce the number of small pieces
- 2) Improved packaging for bulk ham to speed up prep time and improve the quality of the product
- 3) CKE has installed a number of new pieces of equipment such as Marshall Air fry dumps, return and auto feed charbroilers and high speed toasters, again to assist with labor savings, efficiency, and the quality of our products.

All three tests are off to a great start and we hope to see the results of those tests trickle into the restaurants throughout 2024.

The Ops committee remains focused on working directly with the Marketing and IT committees to drive sales and profitable traffic through improved speed of service and the digital experience in our restaurants. To accomplish that, we continue to lean in on our 3 pillars for success which remains: Simplicity, Technology and Inspiration.

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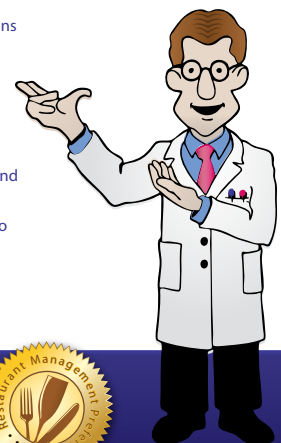
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# COMMITTEE UPDATES

## MARKETING UPDATE

*Jerry Allsbrook – Marketing Co-Chair; Jack Kemp – Marketing Co-chair*

The IHFA & CKE Marketing Committee conducted our initial 2024 TEAMS video conference on January 24th plus an in-person follow-up with the CKE Leadership Team during the IHFA Winter Board meeting Jan. 29-31.

We are happy to report positive system sales over the past 6 months, out-performing the QSR competitive sales benchmark. Hardees produced several big wins in '23 that are continuing in early '24: Breakfast Sales & Transaction increases, Growth of E-Commerce (App/Loyalty and 3PD), more food focused/Quality Advertising campaign, W5 menu simplification and more joint management with the Ops Committee to ensure we move together with one voice.

We have a strong 2024 Marketing Calendar balanced with an effective mix of Core Menu, Affordability/Value pricing, LTO's and innovative Product News to drive Sales and profitable transaction. Key goals are: Fast-track growth with E-Commerce in W2 & W3 (App/My Rewards Loyalty and 3PD). Building Lunch/Dinner sales & profitable transactions with Flame-Grilled 100% Angus Burgers, Hand Breaded Chicken Tenders and improved beverage program will be key drivers.

The “System Core” and “DMA/Local Favorites” Menus that were introduced in W5/2023 provide consistency and feature our primary core product equities. This menu simplification process will also improve QSCV & Hospitality for our brand. Our goal is to become “The Best Restaurant in the Neighborhood”, as we improve guest service with speed, accuracy, served with a smile & thank you.

Our new brand positioning and messaging thru the “Goodness in the Making” advertising campaign is scoring very well with QSR and Hardee's customer base. This features Hardee's premium quality menu equities made by hand with MFS Buttermilk Biscuits & HB Chicken Tenders plus Flame-Grilled 100% Angus Burgers. All video and audio advertising on each media platform will be focusing on Hardee's cravable taste. We will also have everyday value options available across both dayparts to

promote affordability and grow transactions as customers tighten up with their spending and the national QSR brands become more aggressive with prices, deals and news to steal market share.

The new Camelot Media strategy provides targeted Media Plans for all DMA's that are more balanced across multiple platforms like TV, CTV, OTT, social, digital, Google, YouTube, Radio, Outdoor, Print. The target is the heavy fast-food user and Hardee's loyalist. We encourage each owner group to stay in contact with your CKE Field Marketing Team to maximize an efficient & effective media mix.

CKE will also continue to upgrade our APP & My Rewards Loyalty program guest experience in W2&W3 with new features to Grow sales & traffic with our E-Commerce investments. The digital platforms are a huge source of sales that generate increased visit frequency, higher average check and incremental profits. These transactions will increase our customer loyalty.

The IHFA is committed to building a results-oriented business partnership with the CKE Marketing Team that will move us forward Together. Jennifer Tate is the CKE Chief Marketing Officer and Regina Schneider is Hardee's SVP, Marketing. Regina leads a dedicated Hardee's Marketing team that focus on our brand every day. CKE has separated the brands so that each operates independently from the consumer viewpoint, no more dual branded marketing which provides more regional/DMA marketing opportunity.

## PURPOSE

To communicate the franchise owners voice and influence key marketing, Advertising and media decisions that enhance the Hardee's brand.

## MEMBERS

Jack Kemp – Chair	Mick Cato
Jerry Allsbrook - Chair	Jon Munger
Buddy Brown	Nick Shurgot



## IHFA '24 PRIORITIES

- #1 Create differentiated Hardee's voice with consistent Brand Positioning & Advertising featuring our cravable food
- #2 Increase Sales with Tranz to build Four-Wall Profitability & Cash Flow
- #3 Well Tested Marketing Calendar supporting Dual dayparts & Hi-Lo/Affordability events  
Continue breakfast growth and more focus on L/D daypart with Burgers, Tenders & beverages
- #4 Menu management via Optimization + other Ops & Spend Smart simplification programs
- #5 Media communication plans that reach core Hardee's & Heavy QSR target
- #6 HNAF Management to maximize media reach & frequency across all markets & efficient production cost
- #7 Build E-Commerce business (App, My Rewards Loyalty, 3PD, etc) to double digit revenue generator

The IHFA Marketing Committee looks forward to serving you in 2024, Please feel free to contact any of our members to share your insights to build our business.



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**PETER DRUCKER**

## IT COMMITTEE UPDATE

Bob Larimer – IT Co-Chair; Cameron Miller – IT Co-Chair

There are many things going on within the technical side of our business and I want to give you an update of what is happening, focusing mainly on Loyalty and the Hardee's App.

**Loyalty 3.0-** With the launch of Loyalty 3.0 (tentatively May of 2024), all restaurants will be shipped scanners to install at each register. The shipment will include two fixed scanners for front line and a “gun” style scanner with a cable for drive thru.

Work has been completed to allow for a restaurant to self-install with no technical knowledge needed. The scanners will install into a USB slot located under the terminal where other cables connect. Once the scanner is plugged in and has power a provided QR code will need to be scanned to calibrate the scanner. Your POS provider will download the necessary software and configuration files for Loyalty prior to receiving the scanners so they should work “out of the box”.

The scanners will allow guest to gain reward Stars and redeem reward Stars at the POS terminal by scanning a unique QR Code at the time of purchase. This allows our guests to be a part of loyalty without having to purchase through the Hardee's app. If the campaign is launched successfully, we should see app downloads increase and hopefully we can convert some of our typical in store purchasing guests to Hardee's app users.

When the new Loyalty 3.0 program is launched, the workflow will be as follows:

The guest will download the Hardee's app and sign up for Loyalty.

To gain rewards in store, they will make a traditional purchase at the POS (drive thru or front line) and then scan their personal QR Code with the scanner from the app. The transaction will then transmit to Punchh Loyalty, and the Star Rewards will be added to the guest's account. As they continue to frequent the restaurant, Star rewards will continue to accumulate. When the guest has accumulated enough Stars to redeem a re-

ward, they will redeem the reward in the Hardee's app and then scan the QR Code at the scanner and the item will be added to the order on the POS. Also, if they have any Offers in the app that they want to redeem, the procedure is the same.

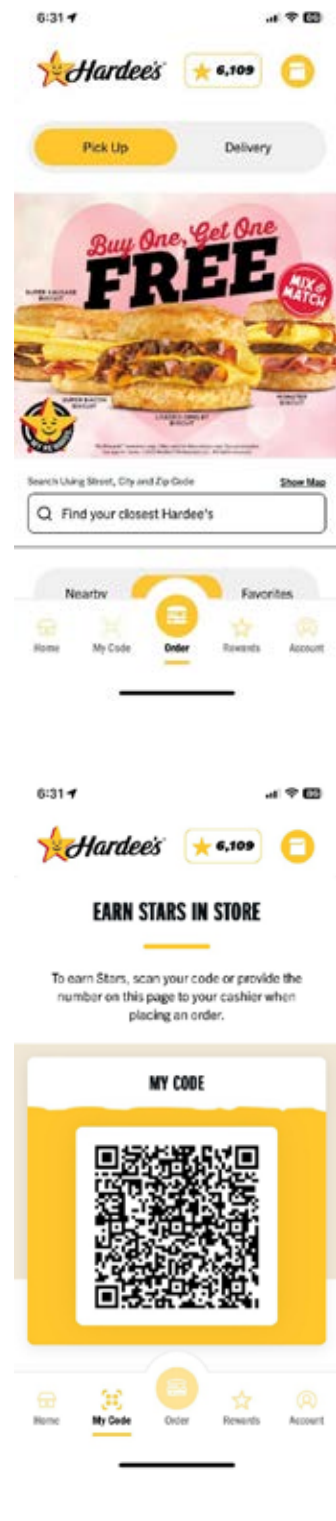
Reward items and special offers will automatically ring up on the POS terminal once the guest scans the QR Code from their app screen.

In Store loyalty, if implemented properly and with adequate restaurant training has the potential to increase average check, increase frequency of visits, and create a better guest journey for our brand. More information will be forthcoming regarding the shipment of scanners and how to successfully implement Loyalty 3.0 into your restaurants.

**Hardee's App Improvements-** The Hardee's app has gone through several changes over the last few months. The changes are very positive and creates a more user-friendly experience for our guests and restaurant personnel.

One of the biggest changes was the removal of RADAR from the order firing process. RADAR was utilized to create an imaginary fence around the restaurant that would fire the order to the POS system once the guest was close by the restaurant. This created two challenges: If the guest did not have Location Services turned on their phone, the order would fail to fire which created confusion with the guest and restaurant. Also, if a guest just drove by the restaurant but was making a few stops before heading to the restaurant, the order would prematurely fire to the POS.

With the removal of RADAR, there are now just two options for ordering: ASAP, which will fire the order based on the estimated “make time” and Scheduled, which will fire the order before the desired pick up time based on the estimated “make time”. “Make time” will vary by product, but it gives the restaurant the adequate time to prepare the order for immediate pick up from the guest.





# COMMITTEE UPDATES

## IT COMMITTEE UPDATE CONTINUED FROM PAGE 10....

The goal is to have the order ready for the guest and waiting in a designated pick-up location. If the order is ready for the guest and they can truly “skip the line”, we will easily increase Hardee’s app order sales by creating a frictionless experience that digital guests anticipate.

Another positive change is the addition of forcing a guest to schedule an order if there are too many items in their bag to be an ASAP order. For example, if the guest orders six combos and attempts to make it ASAP, a message will pop up on the screen prompting them to choose “scheduled order” and will give them a later time for the order to be ready. This change should make things much easier for the restaurant and should allow for orders to easily be ready when the guest arrives.

Rewards have become much easier for a guest to redeem in the new app version. In the past, the guest had to have all the qualifying items in their bag for the offer or reward to be redeemed. Now they can redeem the rewards and offers directly from the Rewards screen.

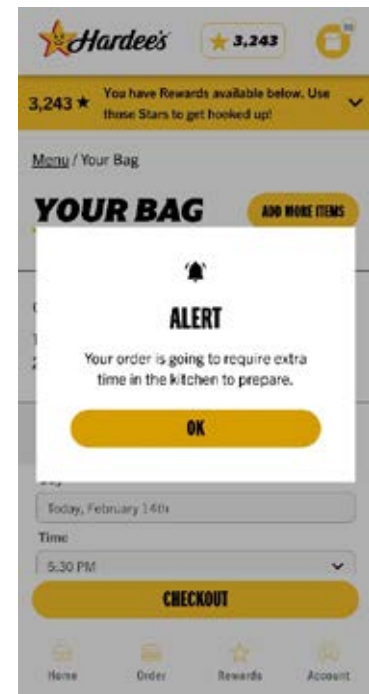
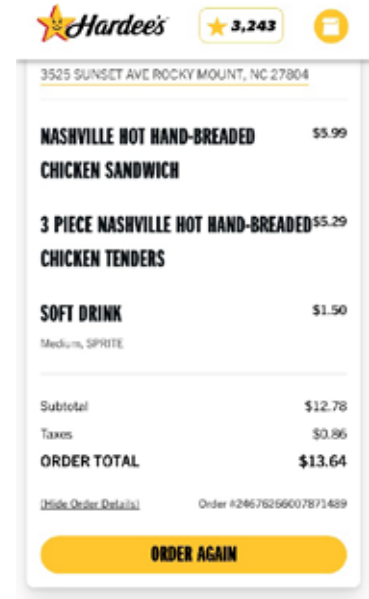
Other enhancements that are in the new versions or will be available in the very near future include the following: Recently frequented restaurants, recent purchases with the option to reorder with one click, clean up and enhancements of the menus, digital payments (GooglePay/ApplePay), improved scheduled ordering with the ability to order lunch during breakfast, and digital gift card enablement.

I am very bullish with the Hardee’s app as I am a heavy app user in general. I frequent the brands that have ordering apps that make it simple for me to pick up food with limited engagement with employees. If we can continue to grow digital sales, we will see guest frequency increase, average check grow, and incremental sales increase. Every successful brand today has a strong digital marketing plan, and they are “all in” on digital sales. They understand how important it is to capture the guests that want a frictionless experience and want to be rewarded for their loyalty to their brand.

If we can continue to improve the tech stack, marketing, and operational procedures and scripting around the Hardee’s app, I am confident we can eventually reach the 20% goal that was unveiled as a goal at the 2023 IHFA convention in Bonita Springs last Fall.

If you have any questions or concerns around Information Technology, please feel free to reach out to Cameron Miller [csmiller@superiorstarco.com](mailto:csmiller@superiorstarco.com) or me [bo-blarimer@boddienoell.com](mailto:bo-blarimer@boddienoell.com).

If you have any questions or concerns regarding CKE technology initiatives, please feel free to reach out to me at [bo-blarimer@boddienoell.com](mailto:bo-blarimer@boddienoell.com).



## HR COMMITTEE UPDATE

Kathy Trusch – HR Co-Chair; Tim Haberkamp – HR Co-Chair

2023 was a busy, productive year for the HR Committee. CKE provided additional resources to assist with providing new training resources for our operations teams. The HR committee added some additional training task force members to our committee to work closer with CKE's Global Learning and Development Team to improve and complete the following programs:

1. **RGM Leader in Training Program (LIT)** - The Restaurant General Manager Program was launched in August 2023. We are pleased with the excellent content created to train successful Restaurant General Managers and successful shift leaders and hourly managers. The following excellent training guides were designed and created: A Leader in Training Leaders Guide was designed for the trainer who is developing new RGMs, and a Leader in Training Learners Guide was created for the RGM trainee. A Foundations Core Training guide was also created for above restaurant leaders which outlines the entire program and responsibility guidelines. Additionally, an MIT Leaders Guide and an MIT Learning journal were created to develop shift leaders and hourly management. The HR committee worked closely with our CKE partners for several months to improve these training tools and to provide additional operations feedback. A Beta Test was conducted with different franchisee restaurants and input was provided prior to finalizing the content. This is an excellent resource that we encourage all franchisees to use as we continue to work together to build great RGMs to operate our restaurants.

*These items can be ordered on FedEx Training Materials. If you experience any issues or have questions, please contact [StarU@ckr.com](mailto:StarU@ckr.com) or [globallearningdevelopment@ckr.com](mailto:globallearningdevelopment@ckr.com).*

1. **2. Star University** - There are significant improvements with Star University which make the process easier for our RGMs to navigate and utilize. Although this will continue to be a work in progress, we are pleased with the partnership with Lisa Holloway, CKE's Director of Learning and Development and Zack Donovan, who work closely with this program. Our task force was involved in 2023 and we continue to communicate with Lisa and Zack on monthly calls to collaborate and provide input to improve the systems. Lisa and Zack joined CKE after Star University was initially rolled out and

they continue to work closely with a third party to build and create improved solutions. Many of the problems restaurants continue to experience are systems issues which CKE's team is working diligently to improve. Overall, we are very happy with the accomplishments and the partnership with our CKE team as we have great opportunities to provide input and feedback to improve the system.



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# COMMITTEE UPDATES

## THE FOLLOWING IMPROVEMENTS WERE MADE RECENTLY:

>> Star University Landing Page was created and updated.

>> Core Learning page was streamlined. Navigation for our restaurant management is improved and easier to use.

>> It is very important that your RGMs report problems with Star University to the help desk that was specifically created for Star University so CKE can track them and provide proper solutions. Star U@ CKR.com. We will continue to collaborate and participate in monthly calls with Lisa, Zack and Andrew Robinson to improve and update Star University.

**3. Virtual Learning Labs** - CKE created a new virtual learning lab entitled Empowering Effective Influence: Leading Through Influence. This program is scheduled for February 27th at 3:00 pm and February 20th at 11:30 am. Other virtual Learning Labs: How to Be an Influential Leader, build a Culture of Accountability, and Developing Performance.

*If you have questions about any of these programs, please contact [globallearningdevelopment@ckr.com](mailto:globallearningdevelopment@ckr.com).*

**4. New District Manager in Training Program** - We are working closely with CKE's Global Learning and Development Team to provide input as CKE finalizes a program for the development of District Managers. A pilot program was completed January 26th and a round table was scheduled for leaders and participants on February 13, 2024. This will be completed in the near future.



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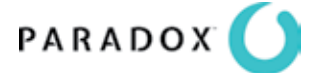


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# COMMITTEE CHAIRS

## ADMIN, CONVENTION & MEMBERSHIP COMMITTEE

**Chairperson** - Bill Boddie - Boddie-Noell Enterprises, Inc.

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**Co-Chair** - Tim Haberkamp

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**Co-Chair** - Jerry Allsbrook - Boddie-Noell Enterprises, Inc.

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## OPERATIONS COMMITTEE

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**Co-Chair** - Sam Munger - Doro, Inc.

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**Co-Chair** - Todd Pahl - Capstone Restaurant Group

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## TECHNOLOGY COMMITTEE

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**Co-Chair** - Bob Larimer - Boddie-Noell Enterprises, Inc.

E: boblarimer@boddienoell.com



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**– Debbie Allison, SVP Supply Chain BURGERFI International, Inc.**



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## IHFA Central Office

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## IHFA Regional Representation Map







Independent Hardee's Franchisee Association  
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**SAVE THE DATE**



**2024 CONVENTION & TRADESHOW**

**SEPTEMBER 29 - OCTOBER 2 | ARIA RESORT & CASINO | LAS VEGAS, NV**