



Development Timeline for Expansion Projects

Stage I: Feasibility (3 months to 3 years)

- **Commitment and Planning:**
 - Clarify vision, values and strategic direction and then build alignment throughout the organization for that vision and direction.
 - Develop business plan
 - Assess owners and community's needs and input through multiple lenses, (surveys, group discussions.)
 - Identify any barriers to expansion.
 - Develop preliminary "sources and uses" budget
 - Conduct market analysis and market feasibility
 - Determine organizational training or development needs and schedule consultants or advisors' visits/trainings.
- **Strengthening and Positioning:**
 - Create any strategic plans to improve areas of current operations or systems that may not be performing adequately in order to build capacity, efficiency and adequate cash from operations and minimize potential outside lending needed.
 - Build internal capacity by strengthening relationships and communication between board and GM and GM and staff.
 - Assess organizational structure and workplace culture readiness.
 - Begin creating staffing plans, new structure and new roles and build transitional plans and timelines.
 - Refine and strengthen branding plans – clarify image strategies and plans.
 - Assess and refresh ownership relations and ownership communication materials.
 - Develop initial financing strategy and resources.
- **Initial Site Work:**
 - Assess new site options (or existing site expansion potential)
 - Develop preliminary site plan and professional store design.
 - Begin selection process for architect and contractor.
 - Seek initial estimates from contractors.
 - Review any legal work that may be necessary on building or city zoning.
 - Seek preliminary approval from the city.
 - Initiate financing drive

First decision point – Does the project meet initial feasibility measures? If so, we move forward *with contingencies* to next phase.

Phase II: Preparation Phase (2 to 12 months)

- Finalize site plan, layout, design and architectural drawings.
- Seek contractor bids and preliminary equipment bids.
- Obtain plan approval by the city, health dept.
- Develop new store promotional plan and finalize staffing plan.
- Finalize all financing, including terms with primary vendors.
- Prepare to sign contract with contractor after proper legal review.
- Prepare to remove any contingencies on building or contracts.

Final Decision Point – Close financing plan and proceed. No turning back!

Phase III: Construction Phase: (2 to 12 months)

- Finalize bids and agreements with equipment vendors.
- Supervise and monitor construction and all change orders.
- Implement new staffing and promotional plans.
- Plan opening inventory orders and lead times.
- Develop plan-o-grams and merchandising plans for each department and storewide.
- Finalize all interior and exterior signage plans.
- Planning for grand opening and any other promotional events.

Phase IV: Preparing for Opening: (1 to 3 months)

- Set equipment and test
- Set inventory
- Hire and train remaining new staff to fill in the staffing plan.
- Install all interior and exterior signage.
- Finalize Grand Opening celebration. Usually 6 to 12 weeks after opening to allow time to settle in and get everything and everyone working together well.
- Pass all inspections and obtain permits and licenses.

Open for Business – Now the REAL work begins!