



Fresh Starts Conference *for food co-ops*



Presented by:



September 12, 2013 * Portland, OR





Map Your Successful Journey

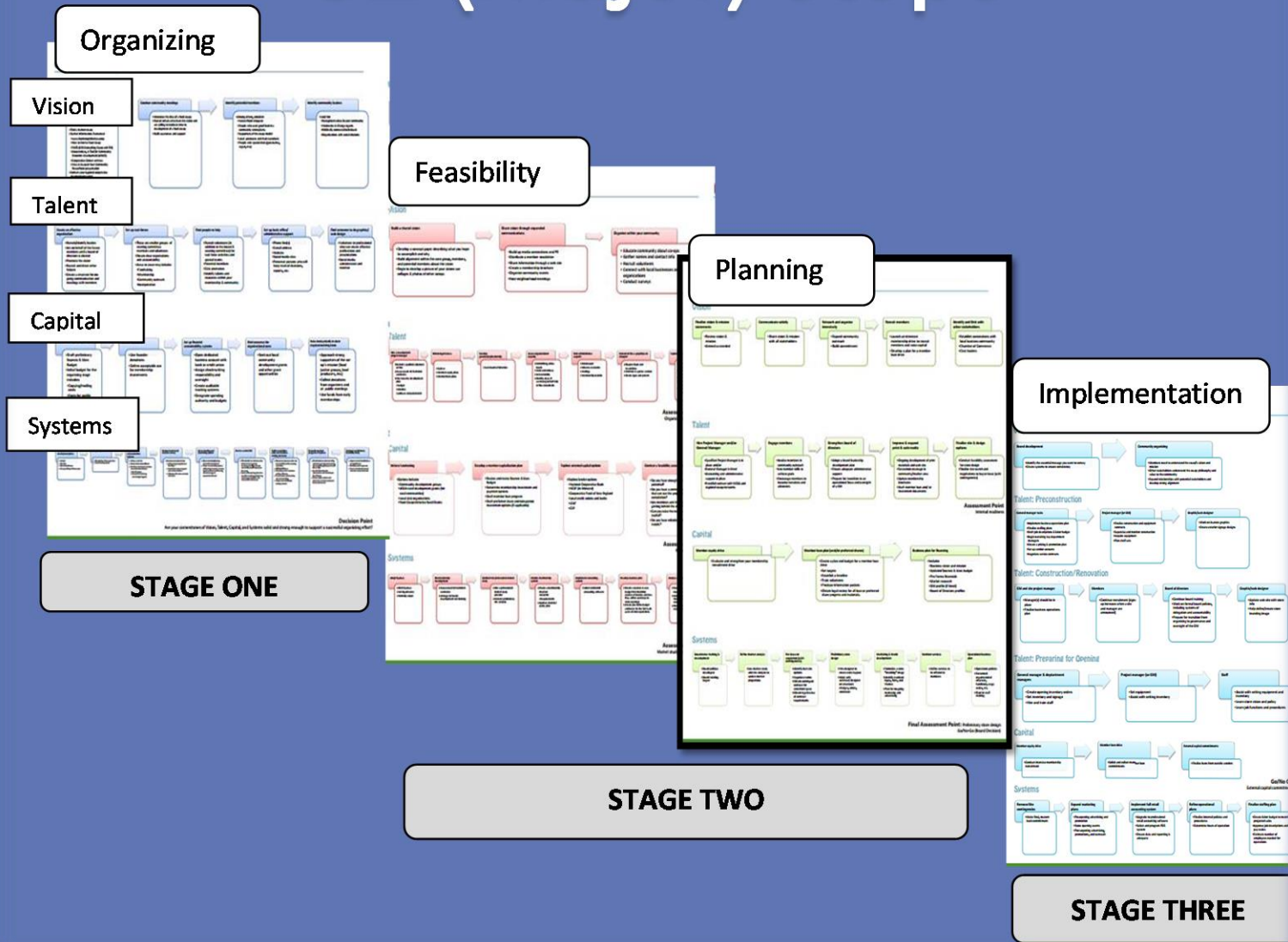


Presentation by
Stuart Reid, Food Co-op Initiative
“Fresh Starts” Conference
September 12, 2013

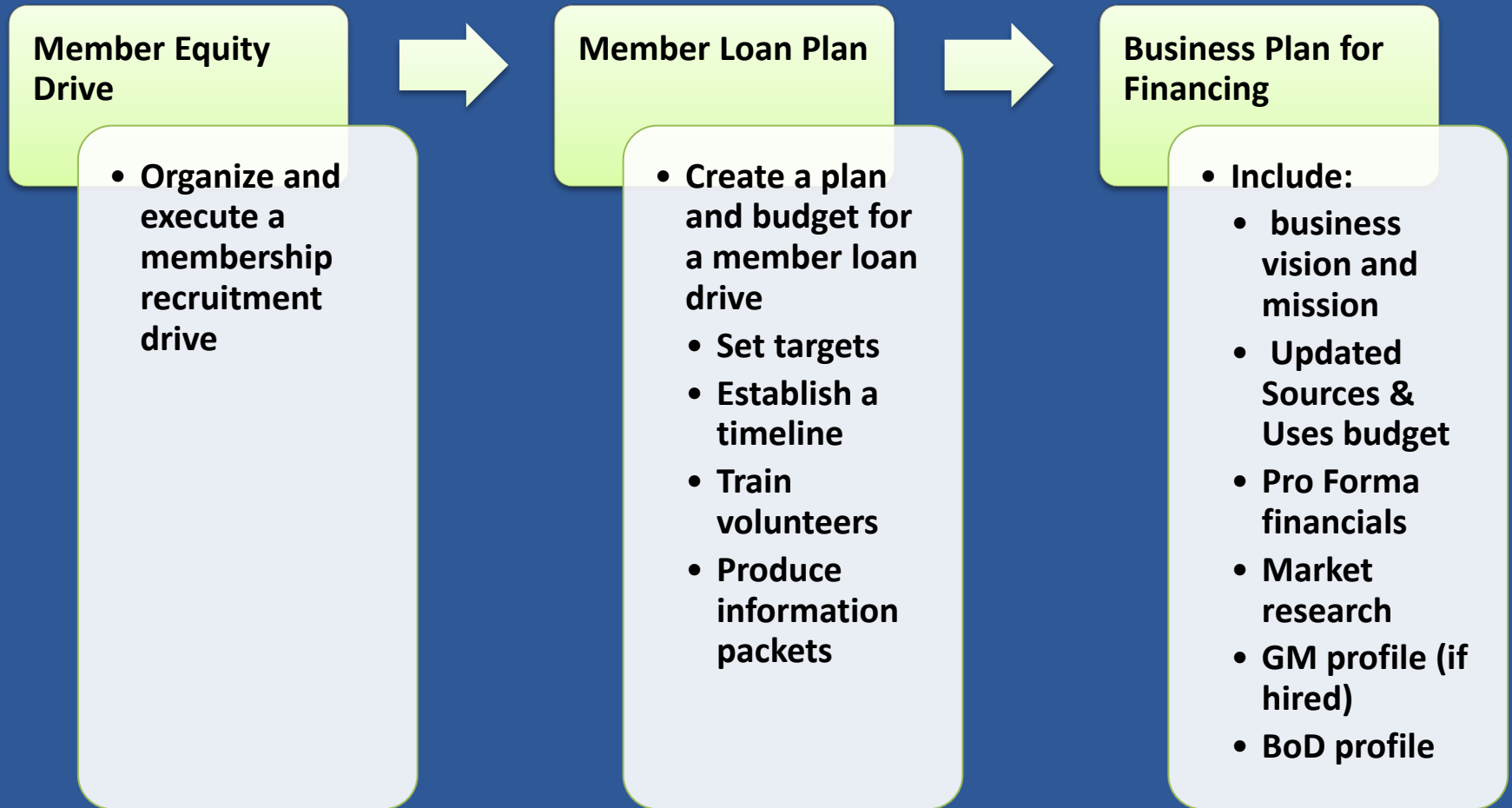
Agenda

- **Mapping as a tool**
- **Getting directions**

81 (major) steps



Feasibility & Planning Stage: Planning



Basics

	STAGES OF DEVELOPMENT							
	STAGE ONE Organizing	STAGE TWO Feasibility and Planning		STAGE THREE Implementing				
CORNER STONES	ORGANIZING 6-18 Months	FEASIBILITY 3-9 months	PLANNING 3-9 months	Preconstruction/Planning & Financing 3-9 months	Construction/Renovation 3-9 months	Prepare for Opening 1-2 months	1st Year	Sustaining
VISION	Idea/Concept-Core Group Convenes Vision Building: Field Trips, Slide Show, Speaker, CCMA Communication Community Organizing Mtgs. Potential members Community leaders	Vision Building Communication Community Organizing: Members Other Stakeholders	Vision & Mission Statement Communication Community Organizing: Members Other Stakeholders	Brand development Community Organizing: Members Other Stakeholders				
TALENT	Steering Committee Champion Task Force/Committees Developer Interested People Administrative Support Graphic/Web Designer	Organizational Capacity Development Project Manager Governance/Leadership Building Administrative Support Legal Review Graphic/Web Designer Developer	Internal readiness Development Project Manager/GM Members Board of Directors Governance/Leadership Building Administrative Support Graphic/Web Designer Developer	GM/Site Project Manager Members Board of Directors Governance/Leadership Building Administrative Support Graphic/Web Designer	GM/Site Project Manager GM Administrative Support Graphic/Web Designer	GM Staff	Customers	
CAPITAL	Organizing Assessment Organizing Grant Writing Matching Funds: Local Fundraising	Grant Writing Member Equity Plan External Capital Options Feasibility Assessment	Member Equity Drive Member Loan Plan Business Plan for Financing	Member Equity Drive Member Loan Drive External Capital Commitments				
SYSTEMS	Development Plan Budget Timeline Concept: Policy & Parameters Preliminary Market Study Preliminary Supplier Analysis Customer Member Survey Accounting-Checkbook Contact List Roles & Decision- Making Process Research: Mbr. Programs,bylaws/incorp	Legal- Bylaws & Incorporation Leadership Development Plan Full Market Study Preliminary Site Analysis Membership System Accounting-Basic Business Program Initial S&U and Pro Forms Supplier Analysis	Governance Training & Development Refine Market Analysis Site/Lease Acquisition (w/contingencies) Holding, Negotiation, Legal Preliminary Store Design Marketing & Brand Development Member Services Accounting-Basic Business Program S&U and Pro Forms Operations Business Plan: Operations Personnel	Remove Contingencies Expanded Marketing Plan Accounting - Full Retail System Expanded Operational Plan Expanded Staffing Plan				
Notes:	BOLD = Assessment Tool Shade = prior assessment takes as decision point							

Vision

Stage One Organizing	Stage Two Feasibility & Planning		Stage Three Implementing	
Organizing 6-18 Months	Feasibility 3-9 Months	Planning 3-9 Months	Preconstruction/Planning & Financing	Construction/Renovation 3-9 months
<ul style="list-style-type: none"> *Idea/Concept-Core Group Convenes *Vision Building: Field trips, Slide Show, Speaker, CCMA *Communication *Community Organizing *Potential Members 	<ul style="list-style-type: none"> *Vision Building *Communication *Community Organizing *Members 	<ul style="list-style-type: none"> *Vision & Mission Statement *Communication *Community Organizing *Members 	<ul style="list-style-type: none"> *Board development *Community Organizing: Members 	

Graphic Timelines

2006

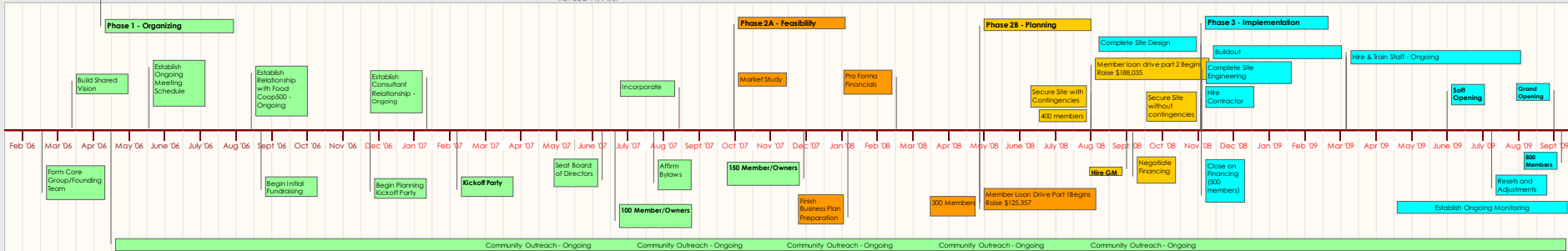
2007

2008

2009

Development Timeline - Friendly City Food Co-op

Revised 11/14/07



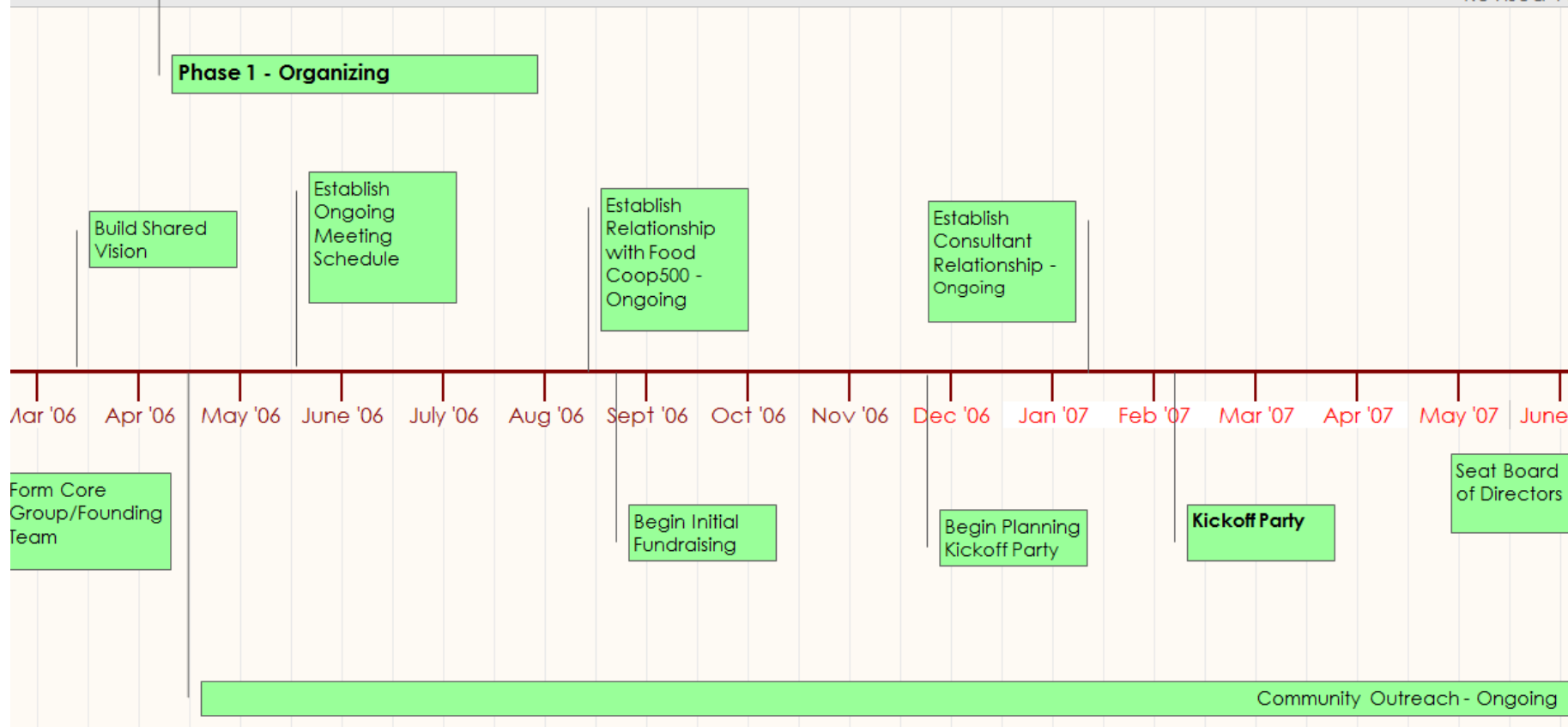
Phase 1: Organizing

Phase 2: Feasibility & Planning

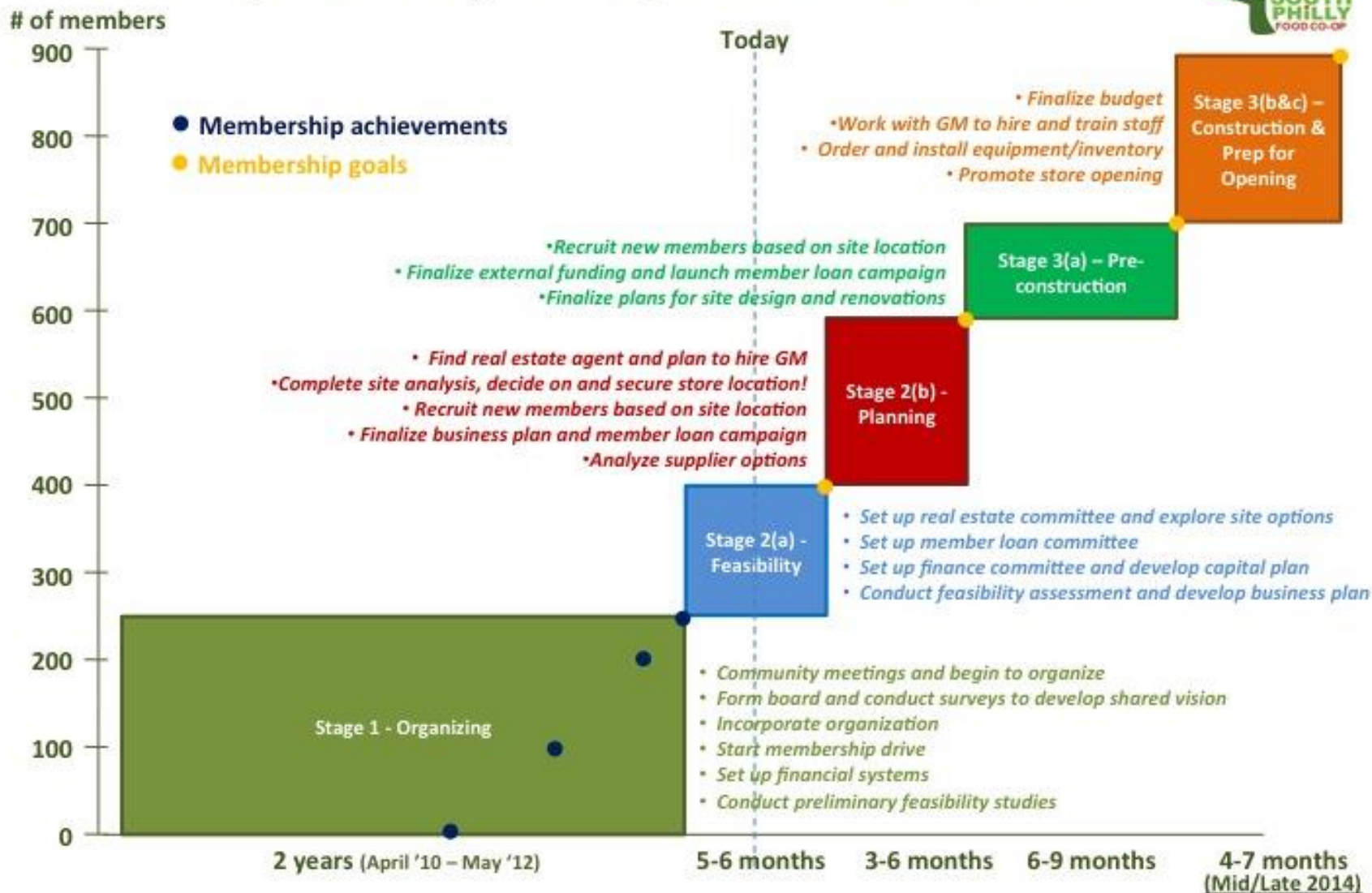
Phase 3: Implementation

Development Timeline - Friendly City Food Co-op

Revised 1



South Philly Food Co-op Development Goals Overview

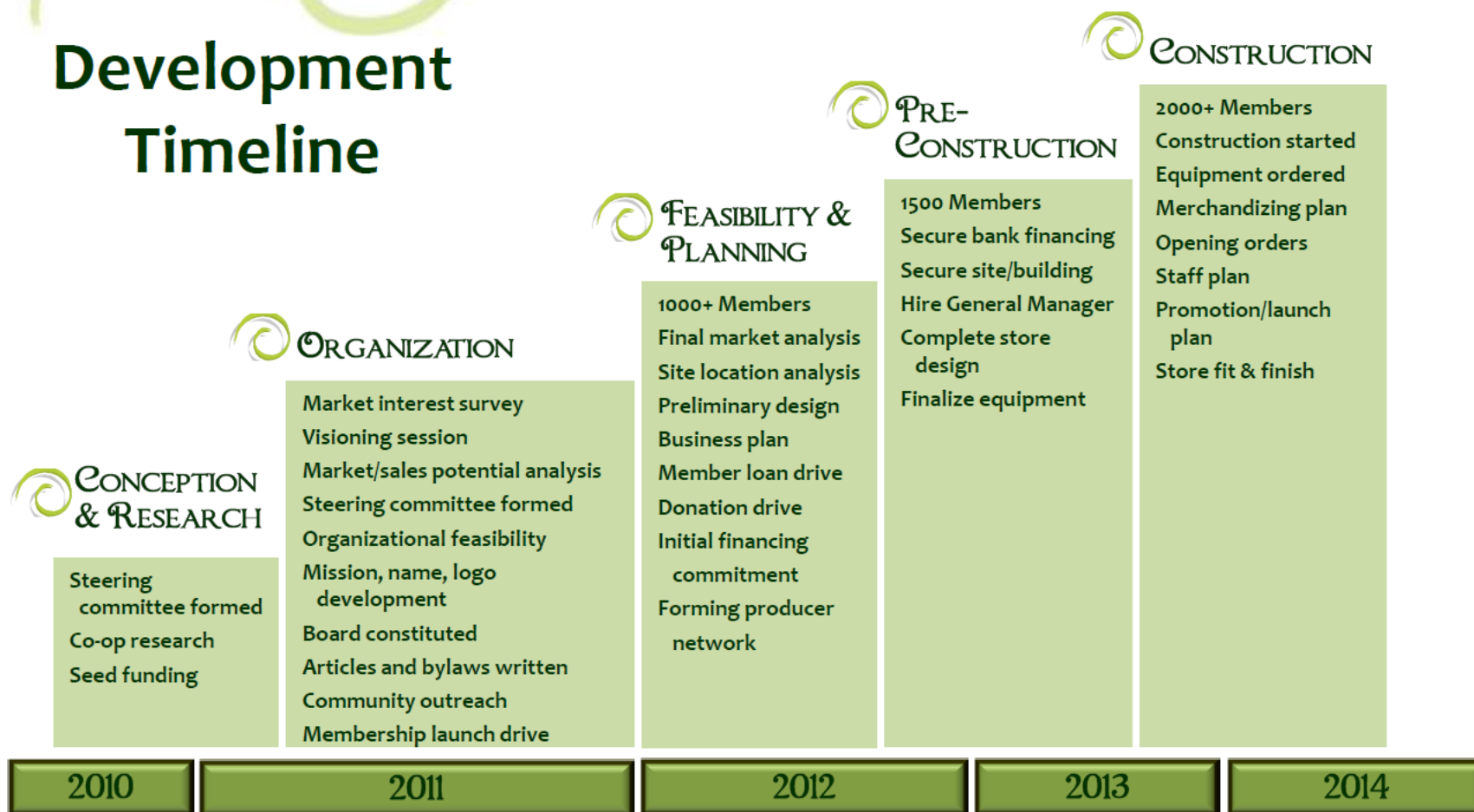


Timing will be influenced by how fast we achieve membership and stage goals

Stage 2



Development Timeline



Timeline/Workplan

Action Item	Date Due	Progress	<input checked="" type="checkbox"/>	Responsible	Cornerstone	Stage
Location/Property Appoint a Board Member (BM) to be the contact person to deal with PK Hoffman as he works on preliminary store design to enable estimates of renovation and equipment costs. Follow up with him		Follow up in Jan. 07	<input type="checkbox"/>	Woot	Vision /talent	Implementation
Location/Property Obtain solid estimates for renovation work and schedule structural, heating and cooling, roofing and environmental inspections.	Jan. 15 07	Mac agreed to do estimates/Kim will recommend inspectors	<input type="checkbox"/>	Debbie /Kim	Systems	Implementation
Business Plan Business Plan committee begins and continues discussions with Bill Gessner obtaining pro forma and narrative materials	01/15/07	Financial draft done, narrative is being done	<input type="checkbox"/>	Business Plan taskforce	Talent/vision/ Systems	Planning
Annual Meeting Send out notification of annual meetings to all members as of 12/27.		Sent out notification and completed roster – follow	<input checked="" type="checkbox"/>	Debbie	Systems	Planning

Rough Plans

Stage 3: Implementation

9/1/2014-10/15/2015

- | | | |
|---|----------------------|-----------------------------|
| A. Preparing for Construction | 9/1/2014-3/31/2015 | |
| B. Member Loan Campaign | 9/15/2014-11/15/2014 | |
| C. Finalize financing & property purchase | 12/1/2014-2/1/2015 | |
| D. Construction (no turning back!) | 4/1/2015-9/15/2015 | Membership goal: 550 |
| E. Hire GM & Prepare for opening: | 4/1/2015-10/15/2015 | |
| F. Store opening! | 10/15/2015 | Membership goal: 650 |

Goals

Projected Timeline

By April 24, 2010:

(Planning work to launch a membership drive. Launch first phase of membership drive by the Earth Day event, April 24th).

By May 26, 2010: Finish Stage 1 Membership Drive

(Have 300 Co-op members signed up)

By June 28th, 2010: Stage 2a

(Complete entire feasibility study by. By this point, we should have up to 450 members.) **this assumes that we keep the momentum going from the Membership Drive in Stage I

October 1, 2010: Stage 2b complete

(Business plan, 650 members, hire general manager, secure some financing. Planning for member loan drive is complete and ready to launch after completing Stage 2b).

April 1, 2011: Stage 3a complete

(Successful member loan drive, have 800 members) bank financing, design work more complete, start construction after completing 3a

Mixed

- August 17 -**Board** launches membership drive (Aug 17 – Sept 30)
 -Goal: at least \$30,000 of additional equity and 200 more members
 -Current: 635 members, \$90,595 of equity. Goal = \$120,000.
- Sept 8 -**Board** launches final phase of member/owner loan drive (Sept 8 – Oct 5)
 -Goal: at least \$235,000 of additional member loans beyond the
 \$165,000 collected or pledged (verbal). \$99,300 collected so far
- Sept 15 -**Finance Committee** (& Eric): all external financing commitments in
 place. Local Bank Consortium commitments are complete. \$100,000 –
 \$125,000 of additional commitments are still needed.
- October 15 -All member loans collected and all grants committed. (Note: at least
 \$239,050 of additional grant money needs to be raised.)
 As of June 18, 09, \$210,950 has been collected or pledged. \$110,950
 has been collected (counting \$50,000 for roof to come from landlord).

Creating Your Map

- Use “4 Cornerstones in 3 Stages” as a reference
- Start with an overview
- Details for current work and near future
 - Dates– start, finish, check-in
 - Tasks
 - Budget
 - Desired outcome (goals)
 - Committee, team, consultants, etc.
 - Person responsible
- Share it and Use it!
- Update regularly

Getting Directions

Let's discuss...

- Where are you now?
- How did you get lost?
- Where are you trying to go?
- Will your vehicle get you there?