British Columbia/Yukon Command

BRANCH ADVISORY DEVELOPMENT CHECKLIST

Renovations Projects Over $25,000

Stage 1: Initial Planning & Approval

- ☐ **Establish a Renovation Committee**
  - Form a dedicated committee separate from the Branch Executive.
  - Obtain approval through a motion at a General Meeting.
  - Define roles and responsibilities of the committee. Committee Chair sign the Statement of Understanding form.
  - Ensure regular reporting to the Executive and membership.

- ☐ **Determine Project Scope and Objectives**
  - Identify the reason for renovation (e.g. safety, accessibility, operational improvement).
  - Define renovation areas (e.g. lounge, washrooms, HVAC, roofing).
  - Ensure compliance with municipal zoning and building codes.

- ☐ **Develop Preliminary Budget and Financial Plan**
  - Review the financial statements to determine available funds.
  - Identify potential funding sources:
    - Branch reserves
    - Government grants
    - Legion fundraising efforts

- ☐ **LCRB Considerations (Licensed Premise)**
  - Check if renovations affect licensed areas (e.g. bar expansion, patio, event space).
  - Determine if renovation plans to LCRB are required.
  - Develop a liquor service strategy during renovations (temporary relocation, limited service).

Stage 2: Obtaining Quotes & Project Planning

- ☐ **Contact Necessary Professionals**
  - Obtain quotes from contractors (at least three).
  - Engage an architect, engineer, or structural consultant (if required).
  - Verify contractor licensing, insurance, and references.
  - Verify no conflict of interest in contractor selection.

- ☐ **Conduct Necessary Studies (If Required)**
  - Structural or safety assessments (for major renovations).
  - Environmental impact analysis (for older buildings with asbestos concerns).
  - Energy efficiency or HVAC studies (for upgrades).

- ☐ **Finalize Project Timeline and Phases**
  - Establish estimated start and completion dates.
  - If required, coordinate renovations in phases to minimize disruption.
  - Schedule work to maintain Legion operations, if possible.
  - Ensure accessibility for members during construction.

- ☐ **Develop a Contingency Plan**
  - Set aside 10-20% of the budget for unforeseen costs.
  - Identify temporary operation locations if the branch must close.
  - Create a communication plan to keep members informed.

- ☐ **Hold General/Special Meeting for Final Approval**
  - Present detailed project plans, including contractor agreements and funding sources.
  - Obtain membership approval through a motion to proceed.
  - General Meeting for renovations under $25,000. Special General Meeting for renovations over $25,000.

- ☐ **Obtain BC/Yukon Command Approval**
  - Submit the renovation proposal, including:
    - Scope of work and estimated budget and financial strategy.
    - Meeting minutes outlining approval of membership at a General/Special Meeting
    - All quotes received.
  - Await written approval before proceeding to contractor selection.

Stage 3: Construction & Monitoring

- ☐ **Begin Construction with Proper Oversight**
  - Assign a point of contact for managing contractor relations.
  - Schedule regular check-ins with contractors and professionals.
  - Maintain financial tracking of expenses.
  - Keep detailed records of progress and issues.

- ☐ **Obtain Necessary Permits**
  - Secure municipal building permits before work begins.
  - Apply for LCRB approval for any liquor license amendments.

- ☐ **Monitor LCRB Compliance (If Licensed Areas Are Affected)**
  - Work with LCRB inspectors to approve modifications.
  - Ensure licensed areas meet post-renovation regulatory requirements.

- ☐ **Update BC/Yukon Command on Progress**
  - Provide status updates as requested.
  - Report unexpected changes in budget or timeline.

Stage 4: Completion & Final Approvals

- ☐ **Conduct Final Inspections**
  - Schedule municipal inspections for code compliance.
  - Arrange LCRB inspection for liquor service areas, if required.
  - Conduct a final walkthrough with the contractor. Address any deficiencies.
  - Ensure all permits are closed and compliance certificates are received.

- ☐ **Financial Review & Documentation**
  - Review final project expenses against the approved budget.
  - Maintain receipts and documentation for future reference.
  - Update the Legion's financial records to reflect renovation costs.

- ☐ **Final Report to BC/Yukon Command**
  - Provide summary report of completed project, include photos. Highlight what went well, challenges faced, and lessons learned.
  - Detailed breakdown of actual costs compared to initial budget.
  - Confirm that all legal and regulatory compliance requirements have been met.

- ☐ **Hold a Reopening Event**
  - Communicate the completion of renovations to members.

This checklist ensures that Legion renovations over $25,000 are well-planned, properly funded, legally compliant, and efficiently executed while maintaining transparency with Legion members and BC/Yukon Command.