British Columbia/Yukon Command

BRANCH ADVISORY DEVELOPMENT CHECKLIST

Relocation or Building a New Legion Branch (with LCRB Compliance)

Stage 1: Initial Planning and Feasibility

☐ **Establish a Property Development Committee**
- Form a dedicated committee to focus solely on the project and separate from the Branch Executive.
- Committee Chair & Branch President sign the Statement of Understand form.
- Define the committee's terms of reference, scope, and responsibilities.
- Obtain approval through a motion at a General Meeting.

☐ **Notify BC/Yukon Command that the branch is exploring a redevelopment project.**
- Branch Operations Advisor(s) will work with the branch to assist through the entire process.

☐ **Determine Project Objectives and Options**
- Identify reasons for relocation or rebuilding (e.g. operational needs, financial sustainability, loss of building).
- Evaluate potential options:
  - Relocate to a leasehold or smaller property.
  - Build a new facility as part of a new project.
  - Freehold Legion building only.
- Address questions such as:
  - What is the end goal?
  - What zoning changes or municipal permissions are needed?
  - How will this improve branch operations?

☐ **Preliminary Planning & Financial Review**
- Conduct a recent property tax assessment review.
- Review financial statements to evaluate funding feasibility.
- Prepare a preliminary project plan outlining goals and potential solutions.
- Ensure compliance with Legion by-laws, municipal codes, and LCRB regulations.
- Ensure regular reporting to the Executive and membership.

☐ **LCRB Preliminary Considerations**
- Review the LCRB guidelines for relocating a liquor primary establishment:
  - Licensing transfer or amendment requirements.
  - Facility suitability for hosting licensed activities.
- Ensure the new location aligns with LCRB requirements, including:
  - Proximity to schools, parks, or residential areas.
  - Adequate infrastructure for safe liquor service and consumption.
  - Municipal parking requirements for licensed establishments.

Stage 2: Obtain Quotes, Engaging Professional Assistance & Project Planning

☐ **Contact Necessary Professionals**
- Obtain quotes for professionals such as architects, engineers, and development consultants.
- Request proposals for an Owner's Representative to oversee the project.

- Define and document the selection process for consultants and developers.
- Ensure no conflict of interest in contractor/professional(s) selection.

☐ **Conduct Essential Studies**
- Commission studies such as:
  - Market Feasibility Study and Traffic and Parking Analysis.
- Ensure studies account for LCRB considerations (e.g., parking for patrons, noise mitigation plans).

☐ **Develop Preliminary Agreements**
- Draft a Memorandum of Understanding (MOU) or Letter of Intent (LOI) with selected professionals.
- Include LCRB requirements in all preliminary designs and agreements.

☐ **Obtain membership approval at a Special General Meeting (SGM)**
- Present updated project plans and agreements at an SGM.
- Secure approval to proceed with detailed design and municipal approvals.

☐ **Submit Documentation to BC/Yukon Command for Review and Approval**
- Submit a project proposal report that includes the following:
  - Scope of work and estimated budget and feasibility reports.
  - Submit all MOUs and Contracts received to-date.
  - Minutes from SGM outlining membership approval.
  - Include LCRB compliance and licensing as part of the preliminary proposal.
- Await written approval before proceeding to next step.

Stage 3: Detailed Planning

☐ **Refine Project Plans**
- Develop concept designs and financial feasibility reports.
- Assess municipal zoning and permit requirements.
- Ensure compliance with bylaws, LCRB regulations, and Legion's not-for-profit status.

☐ **Prepare LCRB Application Materials**
- Include:
  - Floor plans showing licensed areas.
  - Proposed liquor service policies.
  - Documentation of community consultation, if required.
- Work with LCRB inspectors to ensure facility compliance before approval.

☐ **Develop Formal Agreements**
- Finalize development agreements vetted by legal advisors.
- Ensure agreements address property use, rezoning, and financial responsibilities.
- Include specific clauses for maintaining compliance with LCRB requirements.

Stage 4: Final Approvals and Construction

☐ **Obtain Necessary Permits**
- Secure municipal, provincial, or federal permits for construction.
- Submit documentation for final approval from LCRB for the new location and liquor license transfer.
- Determine if LCRB Dormancy Approval is required

☐ **Finalize Financing**
- Confirm all funding sources and agreements.
- Develop a business plan for construction and post-relocation branch operations.

- ☐ **Proceed to Construction**
  - Monitor project progress with monthly financial and development updates to BC/Yukon Command.
  - Implement contingency plans for operational disruptions during construction.

Stage 5: Completion and Opening

- ☐ **Ensure Final Compliance**
  - Schedule an LCRB inspection to confirm the facility meets all licensing requirements.
  - Submit operational policies to LCRB, including staff training on responsible liquor service.

- ☐ **Operational Readiness**
  - Finalize operational plans for the new branch location, including liquor service protocols.
  - Train staff on LCRB regulations and ensure certifications (e.g., Serving It Right).

- ☐ **Final Report to BC/Yukon Command**
  - Provide final report of completed project, include photos. Highlight what went well, challenges faced, and lessons learned.
  - Detailed breakdown of actual costs compared to initial budget.

- ☐ **Hold a Reopening Event**
  - Communicate the completion of the relocation or rebuild to members.

This checklist incorporates key LCRB requirements to ensure compliance during relocation or construction while maintaining a structured and detailed approach.