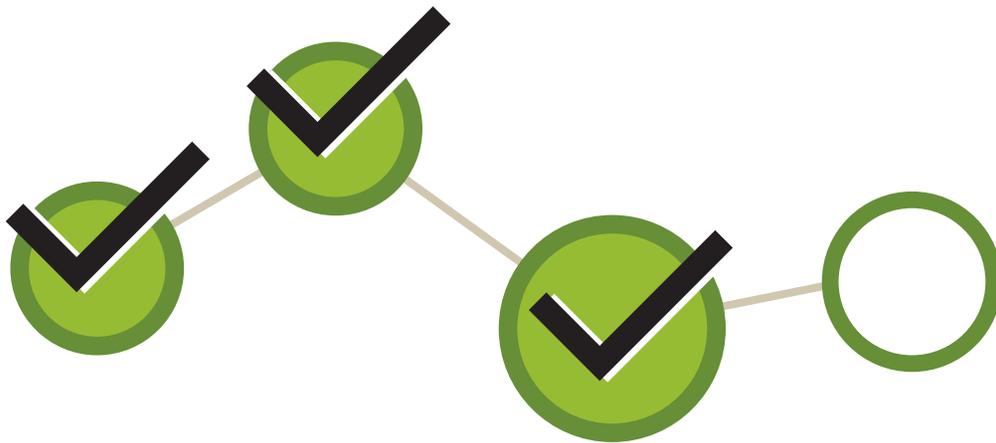


The Food Co-op Development Framework

# CHECKLIST



**FOOD CO-OP  
INITIATIVE**

New co-ops start here.

*Written by Chris Dilley and JQ Hannah,  
Food Co-op Initiative*

Dr. Angela M. Sayles, Institution of Financial Unity  
James Morrell, Columinate  
Heather Lazickas, seven roots  
Michelle Schry, National Co+op Grocers

Food Co-op Initiative | 2026

Some Rights Reserved



Except where otherwise noted, this work is licensed under <http://creativecommons.org/licenses/by-sa/3.0/>

Food Co-op Initiative  
2801 Hennepin Ave. South, PMB 208,  
Minneapolis, MN 55408  
844-324-2667  
info@fci.coop  
www.fci.coop

This resource was made possible by generous grants from the following cooperative organizations:



CDF serves as the apex US cooperative foundation. Through grantmaking and programming, CDF builds the capacity of the cooperative business community to solve societal challenges, reinforce democratic decision-making, and improve economic opportunities for all. As a result, more people in our nation can address their needs, pursue their aspirations, build shared wealth, and thrive in community.

---

**Additionally, FCI would like to thank the following people and organizations for generously contributing their expertise:**

Juliette Jack Banerjee, Rocky Mountain Farmers Union  
Allanah Hines, National Co+op Grocers Development Cooperative  
Hether Jonna, Columinate  
Melanie Shellito, Silvo Cooperative (formerly Firebrand)

**Updated: Feb 2026**

# Welcome to the FCI Food Co-op Development Checklist

The FCI Food Co-op Development Framework articulates an approach to launching a community-owned grocery store. The goal of this Checklist tool is to build off the basics presented in the *Framework Action Guide*, and further flesh out and break into manageable pieces the specific work a community will need to do to accomplish this important and massive undertaking. We have organized this tool by Stage, and then by Area of Work, with tasks being organized in the order that they should be accomplished starting at the top of the page and progressing down.

To make the Checklist even easier to use, we have provided coding based on types of activities that cross over between Areas of Work:

## VISION

The Steering Committee/Board are responsible for setting and holding the Vision with input from the community and business experts via the Co-op Organizing and Business Development efforts.

## FINANCIAL

All activities related to budgeting, accounting systems, tracking spending, financial reporting, etc.

## RESOURCES

It takes Knowledge, People, Trust, Systems and Money to accomplish a food co-op.

Look for these color codes throughout the Stage checklists to help develop a sense of continuity in your work.

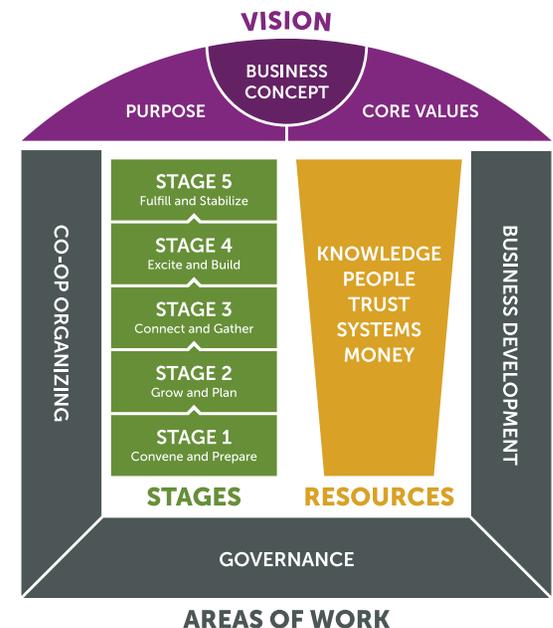
At the start of each Stage section, you'll find a "Begins" statement and a "What You'll Be Doing" section to give you an overview before you dive into that Stage's checklist. At the end of each checklist, you'll find a list of

"Milestones" that should be completed before moving to the next Stage of development. It's important to remember that the strength of your co-op effort and the chances of your success grow based on how complete your work is Stage by Stage.

The Framework is informed by decades of experience both of communities that have worked to bring these stores to life in their communities, and the consultants and other practitioners that have supported them and learned alongside them. That said, we look forward to your input and learning together how to support the opening of even more, better, stronger community-owned grocery stores.

*A note on Stage 5:* One of the innovations of the FCI Framework is the addition of Stage 5 — when the co-op is open and seeking stability. FCI is currently working with many stakeholders to create a fuller understanding of the work of Stage 5 so we can offer more guidance for this stage in the future. Luckily, many organizations already exist to provide expert operations support when your store is open and we encourage you to utilize these partner organizations.

Have fun cooperating!



# 1

# STAGE

## Convene & Prepare

Begins — when the co-op's exploratory team consciously decides the cooperative model is the right one for organizing to meet their community's need(s) and begins meeting regularly to move the development of the co-op forward.

### **WHAT YOU'LL BE DOING IN STAGE 1, by Area of Work:**

#### **Co-op Organizing:**

- Educate yourselves and your community about what a co-op is
- Share the Vision for a food co-op and collect feedback
- Launch and support member-ownership campaign

#### **Governance:**

- Determine and develop decision-making, delegation and accountability processes
- Formalize your Vision (Purpose, Values, and Business Concept) with input from Co-op Organizing and Business Development through an intentional process
- Incorporate and create a member-ownership program

#### **Business Development:**

- Articulate your co-op's initial Business Concept informed by a preliminary market analysis and preliminary sources & uses budget

#### **RECOMMENDED APPROACH**

**Note:** The following list of tasks, in time order from top to bottom, are a recommended way of approaching the work. We realize that every community is different, and we have also learned that skipping steps in this process can lead to a lower chance of co-op success.

Welcome to the journey  
of starting a food co-op...

Co-op Organizing	Governance	Business Development
<p><input type="checkbox"/> Research and understand the cooperative model and read the <a href="#"><i>FCI Guide to Starting a Food Co-op</i></a>.</p> <p>Develop systems and engage the community with goal of establishing community feasibility:</p> <p><input type="checkbox"/> Host community meetings:</p> <ul style="list-style-type: none"> <li>▪ Intro a co-op and why we need one</li> <li>▪ Get community input on Vision (purpose and core values)</li> <li>▪ Collect contact info and how attendees want to support</li> </ul> <p><input type="checkbox"/> Meet with local leaders, explain Vision, get input</p> <p><input type="checkbox"/> Create effective strategy and internal systems for external communication (website, email list, social media, etc.) and community engagement (meetings, surveys, etc.), and continuously improve them</p> <p><input type="checkbox"/> Post regularly on social media and publish regular email newsletter with organizing updates</p> <p><input type="checkbox"/> Set up administrative support systems to track volunteer interest, contact info, etc.</p> <p><input type="checkbox"/> Develop a volunteer engagement strategy</p>	<p>Form a core group or steering committee and read the <a href="#"><i>FCI Guide to Starting a Food Co-op</i></a>.</p> <p><input type="checkbox"/> Determine how decisions will be made (e.g., consensus, parliamentary, etc.)</p> <p><input type="checkbox"/> Create effective systems for steering committee communication and meetings, and continuously improve them; create a governance code of conduct [<a href="#"><i>Columinate Policy Register Template for Startups</i></a>]</p> <p><input type="checkbox"/> Develop an initial Vision (Purpose, Core Values)</p> <p><input type="checkbox"/> Empower Business Development to draft a Business Concept</p> <p><input type="checkbox"/> Choose a temporary name &amp; logo</p> <p><input type="checkbox"/> Decide on a governance system that allows for decision-making, delegation, and accountability; make a plan for training and implementation of the system [<a href="#"><i>Policy Governance, Sociocracy</i></a>]</p> <p><input type="checkbox"/> Develop committee structure: identify committees, develop committee charters and reporting schedule and guidelines. FCI recommends to start with the following committees to align with Areas of Work: Legal, Finance, Member-owner Outreach, and Business Development.</p> <p><input type="checkbox"/> Develop Board Process policies</p> <p><input type="checkbox"/> Review and integrate community feedback on Vision (Purpose and Core Values); review Business Concept draft</p> <p> <b>Have questions about this?</b> Email us at <a href="mailto:info@fci.coop">info@fci.coop</a></p>	<p>Develop preliminary Business Concept — <i>what form will your store take? what are the non-negotiable elements of your dream store? what are the "nice to haves"?</i></p> <p><input type="checkbox"/> Embark up on Business Development as a learning journey — <i>Prepare to explore what's possible and prudent as you seek to meet the developing Vision.</i></p>
<p>Having articulated a draft Vision with Purpose, Core Values, and Business Concept, you're ready to start early feasibility work to learn how to make the Vision happen, and if the community will support it.</p>		

Co-op Organizing	Governance	Business Development
<ul style="list-style-type: none"> <li><input type="checkbox"/> Set member-ownership goals by Stage [FCI video: <b>Setting Owner Goals</b>]</li> <li><input type="checkbox"/> Post Vision on website, social media, in email, etc. and collect feedback</li> <li><input type="checkbox"/> Develop member-owner program materials: <ul style="list-style-type: none"> <li>▪ Brochure/one-pager</li> <li>▪ Application/member-owner packet</li> <li>▪ Excel/CRM to track member-owners and equity</li> </ul> </li> <li><input type="checkbox"/> Identify and recruit potential member-owners (pledges) at community events, online, etc.</li> <li><input type="checkbox"/> Update public facing Vision to include Business Concept; track feedback and provide to Board</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Finance Committee review and refine budget prepared by Business Development</li> <li><input type="checkbox"/> Approve budget for Stage 1</li> <li><input type="checkbox"/> Set up administrative support to keep track of money, membership, data, etc.</li> <li><input type="checkbox"/> Identify a fiscal sponsor</li> <li><input type="checkbox"/> Identify and secure funding for Stage 1</li> <li><input type="checkbox"/> Appoint the incorporation Board of Directors; train them on the chosen governance structure and make a plan for training to support this work</li> <li><input type="checkbox"/> Draft Articles of Incorporation, Bylaws, setting member-owner share and benefits</li> <li><input type="checkbox"/> Review and approve member-owner program materials</li> <li><input type="checkbox"/> Approve Business Concept update, add to the Purpose and Core Values to make complete Vision — <i>make sure to include ability to raise money from member-owners (loans, preferred shares) in documents</i></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Develop a <b>preliminary Sources &amp; Uses budget</b> (S&amp;U) Note: You will not know square footage until you do a PMA (below). As a starting point, model with 1000–3000ft<sup>2</sup> in a rural community and 5000–7000ft<sup>2</sup> in an exurban, suburban or urban community</li> <li><input type="checkbox"/> Carry out a preliminary market assessment (PMA)</li> <li><input type="checkbox"/> Provide to the Board a revised Business Concept based on findings of PMA and S&amp;U</li> </ul>
<p><b>You're ready to incorporate and start taking members!</b></p>		
<ul style="list-style-type: none"> <li><input type="checkbox"/> Formalize co-op name and logo with a professional designer. Roll out onto website, email newsletter, social media, etc.</li> <li><input type="checkbox"/> Once incorporated, launch first intensive member-owner recruitment campaign</li> <li><input type="checkbox"/> Meet or exceed your Stage 1 member-ownership goal</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Incorporate and adopt bylaws</li> <li><input type="checkbox"/> Open a bank account</li> <li><input type="checkbox"/> Develop a budget for Stage 2 (refer to prelim S&amp;U tool in Business Development)</li> <li><input type="checkbox"/> Create and charter an elections committee</li> <li><input type="checkbox"/> Once you reach your Stage 1 goal for member-owners, facilitate your first official Board election</li> <li><input type="checkbox"/> <b>Board approves a Business Concept worth doing full business feasibility on and thus rules to transition from Stage 1 to Stage 2</b></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Get feedback from community on the draft Business Concept: <i>is there buy-in? And is there organizing leadership energy to rally around this Vision to build support over time?</i></li> <li><input type="checkbox"/> Research sourcing/support orgs including National Co-op Grocers, IGA, and INFRA</li> </ul>



# STAGE 2

## Stage 2: Grow & Plan

Begins — when the co-op’s Board assesses how well the co-op has met its preliminary goals for business feasibility and co-op organizing and, based on this assessment, votes to formally move the co-op into Stage 2 organizing.

### WHAT YOU’LL BE DOING IN STAGE 2, by Area of Work:

#### Co-op Organizing:

- Growing your member-ownership through campaigns and community engagement to achieve the number of members and income goals set for Stage 2

#### Governance:

- Engage with business development with goal of approving a business plan
- Evolve governance systems and activities

#### Business Development:

- Feasibility research including market study and pro forma
- Align Business Concept with feasibility studies and with operational realities
- Draft business plan for approval by the Board of Directors

### RECOMMENDED APPROACH

**Note:** The following list of tasks, in sequential order from top to bottom, are a recommended way of approaching the work. We realize that every community is different, and we have also learned that skipping steps in this process can lead to a lower chance of co-op success.

Co-op Organizing	Governance	Business Development
<ul style="list-style-type: none"> <li><input type="checkbox"/> Create regular opportunities throughout Stage 2 for community engagement, listening, and feedback on Vision to support development of Trust — <b>Goal: Activate and energize a growing part of the community with the co-op's Vision</b></li> <li><input type="checkbox"/> Regular Co-op 101 educational sessions</li> <li><input type="checkbox"/> Regular events, social media, website updates and email newsletter.</li> <li><input type="checkbox"/> Start to hold regular member meetings; quarterly has worked well in some communities</li> <li><input type="checkbox"/> Seek input, conduct surveys</li> <li><input type="checkbox"/> Metrics: steady membership growth, social engagement, open rate on emails, # volunteers as a proportion of membership, website visits, community relationships with trusted, relevant, and respected orgs and people</li> <li><input type="checkbox"/> Review case study on <b>Community Trust: Bronzeville FC presentation</b></li> <li><input type="checkbox"/> Hold semi-annual member-owner drives</li> <li><input type="checkbox"/> Share Vision statement provided by the Board through communication channels</li> <li><input type="checkbox"/> Engage community leaders with Vision statement to get input and support</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Vote to formally begin Stage 2 organizing</b></li> <li><input type="checkbox"/> Create first draft of a monitoring calendar [<b>Columinate Annual Planning Calendar</b> template] and begin to review, self-report, and refine Board Process policies per the calendar, and evaluate and accept committee reports (and staff reports, if applicable).</li> <li><input type="checkbox"/> Begin annual Board self-assessments 6 months after first Board seated; Board retreats twice per year</li> <li><input type="checkbox"/> Assess organizational capacity and identify needed skills and experiences; seek those skills in additional Board members, volunteers, and/or consulting support</li> <li><input type="checkbox"/> Committees — update your committee roster to meet the current development needs of the organization. FCI suggests: <ul style="list-style-type: none"> <li>▪ <b>Keep</b> Member-owner Outreach</li> <li>▪ <b>Add</b> Site Selection (by end of Stage 2), Fund Development, and PM Hiring committees</li> <li>▪ <b>Evolve</b> Finance to receive, review and report to Board on monthly financials, and develop/revise budgets</li> <li>▪ <b>Evolve</b> Business Development charter to include supporting site search and pre-operations (PM/GM liaison)</li> </ul> </li> <li><input type="checkbox"/> With updated Business Concept from Business Development, draft a full Vision statement [<b>Concept Paper, Guide, p44</b>]</li> <li><input type="checkbox"/> Identify lenders and philanthropic matches for your project; provide them with regular updates</li> <li><input type="checkbox"/> Continue Fundraising toward Stage 2 goal per the preliminary S&amp;U or the current pro forma</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Set up intro calls with National Co-op Grocers DC, INFRA, and IGA to determine fit and next steps/timeline</li> <li><input type="checkbox"/> Contract for a professional** market study</li> <li><input type="checkbox"/> With Market study results, commission full professional** pro forma. <b>Note: this is often a sobering process, and absolutely critical to establishing feasibility</b></li> <li><input type="checkbox"/> Update Business Concept based on the market study and pro forma; provide to the Board</li> <li><input type="checkbox"/> Develop an understanding of the attributes of a preferred site based on the market analyst's feedback and best practices</li> <li><input type="checkbox"/> Establish Site Selection Committee by end of Stage 2; inform committee of required site characteristics from market study (size, location, parking, ingress/egress, synergy, etc.)</li> </ul>

*continued on next page...*



Co-op Organizing	Governance	Business Development
	<ul style="list-style-type: none"> <li><input type="checkbox"/> Build Board financial understanding:               <ul style="list-style-type: none"> <li><input type="checkbox"/> Have Pro Forma developer educate the Board on the pro forma, identifying next steps</li> <li><input type="checkbox"/> Establish a regular cadence of review and updates with pro forma developer</li> <li><input type="checkbox"/> Receive training on how to monitor sources and uses, and key performance indicators and ratios</li> </ul> </li> <li><input type="checkbox"/> Review and propose new committee structure/charters in anticipation of Stage 3</li> <li><input type="checkbox"/> <b>Having tightened up pro forma and Vision statement/ Business Concept, complete and approve your co-op's Business Plan <i>[FCI Business Plan template]</i></b></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Engage with Project Manager (if financially viable) or consultant with operational background to support:               <ul style="list-style-type: none"> <li><input type="checkbox"/> Site search/selection</li> <li><input type="checkbox"/> Complete Business Development portions of the business plan</li> <li><input type="checkbox"/> Begin to research store designers and what to look for in store design</li> </ul> </li> <li><input type="checkbox"/> Finalize business plan and present to the Board</li> </ul>

\*\* Professional providers for market analysis and pro forma creation will foster trust and create confidence in partners, community members and, eventually, lenders. It will also avoid wasting time and money to redo work. Please request FCI's list of professional vendors for this work.





# STAGE 3

## Stage 3: Connect & Gather

Begins — when the Board completes a final assessment and approval of the specific business plan for the co-op’s future grocery store, having assessed it for meeting the co-op’s Vision *and* for strong business feasibility. They formally vote to move the co-op into Stage 3 organizing. A “yea” vote means the Board is agreeing to utilize this business plan as the foundation of all of the co-op’s future startup development.

### WHAT YOU’LL BE DOING IN STAGE 3, by Area of Work:

#### Co-op Organizing:

- Growing your member-ownership through campaigns and community engagement to achieve the number of member-owners and income goals set for Stage 3
- Growing your co-op’s role and visibility by stepping into partnerships and discussions where the co-op can begin to serve the community, even before having a storefront

#### Governance:

- Develop your understanding of the financial framework
- Ensure mechanisms and relationships are in place to bring in member-owner capital as well as other capital
- Identify and sign an LOI/lease for a site
- Raise all the capital required

#### Business Development:

- Ensure alignment between the business plan and site qualities during site search

#### RECOMMENDED APPROACH

**Note:** The following list of tasks, in sequential order from top to bottom, are a recommended way of approaching the work. We realize that every community is different, and we have also learned that skipping steps in this process can lead to a lower chance of co-op success.

Co-op Organizing	Governance	Business Development
<ul style="list-style-type: none"> <li><input type="checkbox"/> Conduct strong biennial membership drives to recruit and engage members</li> <li><input type="checkbox"/> Continue robust engagement with the community in the form of in-person events, email newsletter, and strong social media presence to share the Vision and activate the community</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Vote to formally begin Stage 3 Organizing</b></li> <li><input type="checkbox"/> Review and approve proposed updates to committees/charters to serve Stage 3</li> <li><input type="checkbox"/> Provide potential lenders and philanthropic agencies with regular updates</li> <li><input type="checkbox"/> Delegate drafting of member-owner loan, preferred share or other investment documents to Fund Development committee</li> <li><input type="checkbox"/> Assess accounting system for capacity to manage membership and member-owner loan information (CPA advise)</li> <li><input type="checkbox"/> Get legal review of finalized member-owner loan/preferred shares investment docs — prepare to launch once site is identified</li> <li><input type="checkbox"/> Update your Vision and mission statements based on input and feasibility data; share with all stakeholders</li> <li><input type="checkbox"/> Adopt a Board leadership development plan to deepen teamwork and effectiveness</li> <li><input type="checkbox"/> Refine understanding and use of policies to delegate and hold accountable committees and staff members; develop Board/Mgmt Relationship, Executive Limitations and Ends policies in prep for GM hiring</li> <li><input type="checkbox"/> Hire a Project Manager to oversee the store and business development once site is secured</li> <li><input type="checkbox"/> Review sites as identified with input from Business Development on alignment with Business Concept</li> <li><input type="checkbox"/> Finance committee update pro forma and present to Board monthly with budget-to-actual reporting</li> <li><input type="checkbox"/> Identify top sites and contract for a professional** market study update</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Engage with Site Search Committee to ensure site needs are understood and met during site search</li> <li><input type="checkbox"/> Review applications for a Project Manager to manage through construction and store systems set up in early Stage 4</li> <li><input type="checkbox"/> Engage with the Project Manager hired by the Board to ensure alignment with the business plan and Business Concept</li> <li><input type="checkbox"/> Provide Board with regular site search updates</li> <li><input type="checkbox"/> Work with operational consultant to identify systems needs and improvements including: accounting, HR, POS, etc., to serve as foundation for operational plan to engage GM</li> <li><input type="checkbox"/> Begin to identify potential suppliers in local area, documenting for GM use</li> <li><input type="checkbox"/> Advise Board on supply and support relationships (NCG, INFRA, IGA, etc.)</li> </ul>
<p><b>You've identified a viable site!</b></p>		

Co-op Organizing	Governance	Business Development
<ul style="list-style-type: none"> <li><input type="checkbox"/> Promote capital campaign at events and on social media; boost “become a member-owner” messaging</li> <li><input type="checkbox"/> Utilize structured marketing campaigns to continue robust community engagement, signing up member-owners and updating on progress toward capital campaign goal</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Launch a Capital Campaign [<a href="#"><i>Capital Campaign Workbook</i></a>]</li> <li><input type="checkbox"/> Negotiate on an LOI for the site contingent upon meeting fundraising/member-ownership goals</li> <li><input type="checkbox"/> Begin planning for GM hiring and mission transfer [<a href="#"><i>Startup Leadership Transition Handbook</i></a>]</li> <li><input type="checkbox"/> Review updated business plan with sources &amp; uses and Operational projections (pro forma) based on specific site</li> <li><input type="checkbox"/> Provide potential lenders with an update and explore lending relationship, getting letters of commitment as able</li> <li><input type="checkbox"/> Raise all needed funds (loans, member-owner investments, donations, etc.) to complete the project, with adequate working capital in the bank at open to weather a few years of operational losses</li> <li><input type="checkbox"/> Once ALL money is raised, resolve contingencies, and sign lease or purchase agreement on the site</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Update market study to get updated site-specific sales potential</li> <li><input type="checkbox"/> Update pro forma with updated site-specific sales projections from market study</li> <li><input type="checkbox"/> Update operational plan with site specific details</li> <li><input type="checkbox"/> Engage with store designer</li> </ul>
<p><b>You have raised ALL the money and have a signed Lease or Purchase agreement. ONLY NOW are you ready to go public with your site</b></p>		
<ul style="list-style-type: none"> <li><input type="checkbox"/> Create materials for social media and in person events to show location and communicate next steps</li> <li><input type="checkbox"/> Continue robust community engagement, sharing progress of all kinds, and member-owner recruitment</li> <li><input type="checkbox"/> Confirm that you’ve achieved your Stage 3 member-ownership goal</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Get training on retail grocery key ratios and key performance indicators to keep tabs on as a Board, once open</li> <li><input type="checkbox"/> Study Executive Limitations report examples from open co-ops with goal of handing off a preferred format to new GM in Stage 4</li> </ul> <p style="text-align: center;">  <b>Have questions about this?</b>        Email us at <a href="mailto:info@fci.coop">info@fci.coop</a> </p>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Finalize store design and update sources &amp; uses with any changes</li> </ul>

*continued on next page...*

Co-op Organizing	Governance	Business Development
	<ul style="list-style-type: none"> <li><input type="checkbox"/> Committees — plan to update your committees to meet Stage 4 development needs of the organization. FCI suggests:               <ul style="list-style-type: none"> <li>▪ <b>Retire</b> PM Hiring, Site Search Committee</li> <li>▪ <b>Keep</b> Finance, Member-owner Outreach, Fund Development</li> <li>▪ <b>Add</b> GM Hiring and Executive Review Committees, and ad hoc Elections Committee</li> <li>▪ <b>Add</b> Mission Transition Committee chartered to create a Mission Transition Plan (<i><u>p58–60 of Startup Leadership Transition Handbook</u></i>)</li> <li>▪ <b>Evolve</b> Business Development to include business systems implementation in support of GM</li> </ul> </li> <li><input type="checkbox"/> Prepare for GM hiring and oversight in late Stage 4</li> <li><input type="checkbox"/> <b>Approve transition to Stage 4 once site is secured, money is raised, and Stage 3 member-owner goal is achieved</b></li> </ul>	

\*\* Professional providers for market analysis and pro forma creation will foster trust and create confidence in partners, community members and, eventually, lenders. It will also avoid wasting time and money to redo work. Please request FCI's list of professional vendors for this work.





# 4

# STAGE

## Stage 4: Excite & Build

Begins — when the Board assesses the Resources gathered to meet the co-op’s business plan as well as the level of member-owner engagement/community momentum the co-op has reached and, finding both adequate to ensure the co-op’s success in the next two stages, formally votes to move the co-op into Stage 4 organizing.

### WHAT YOU’LL BE DOING IN STAGE 4, by Area of Work:

#### Co-op Organizing:

- Develop and maintain retail-ready co-op brand, marketing and communications
- Support member-ownership growth to reach the required levels by opening day
- Support opening day and grand opening celebrations

#### Governance:

- Provide support and oversight to Project Manager
- Closely monitor cash status and raise additional capital
- Hire and onboard General Manager
- Develop and implement plan to evolve from working to governing Board through Stages 4 and 5

#### Business Development:

- Support and monitor tasks delegated to Project Manager and General Manager to ensure accountability to the Business Concept
- Complement skills and activities as needed by the Project Manager and/or General Manager and as delegated by the Board

#### RECOMMENDED APPROACH

**Note:** The following list of tasks, in sequential order from top to bottom, are a recommended way of approaching the work. We realize that every community is different, and we have also learned that skipping steps in this process can lead to a lower chance of co-op success.

Co-op Organizing	Governance	Business Development
<ul style="list-style-type: none"> <li><input type="checkbox"/> Finalize retail-ready brand development</li> <li><input type="checkbox"/> Create a store-specific marketing and communication plan to support opening</li> <li><input type="checkbox"/> Continue to engage members-owners and the community with regular updates about construction, hiring, committee work, etc.</li> <li><input type="checkbox"/> Execute member-owner campaigns every 6–12 months</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Vote to formally begin Stage 4 Organizing</b></li> <li><input type="checkbox"/> Provide oversight and support to Project Manager to oversee construction, installation of equipment, and set up of store operating systems</li> <li><input type="checkbox"/> Expect regular reporting from Project Manager on project status — request support as needed from Business Development</li> <li><input type="checkbox"/> Closely monitor cash status and raise additional capital as needed to cover unanticipated costs</li> <li><input type="checkbox"/> Adopt Mission Transition Plan created by the Mission Transition Committee</li> <li><input type="checkbox"/> Hire GM and plan for needed training and support [Columinate <b>GM Success Profile</b>]</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Coordinate volunteer support to Project Manager as Board deems necessary</li> <li><input type="checkbox"/> Ensure store plan stays on track with the Business Concept</li> <li><input type="checkbox"/> Support with operational planning tasks — such as HR and finance systems, POS — as needed prior to GM hire and to complement other supports (Project Manager, consultants, supply and support orgs — NCG, INFRA, IGA, etc.)</li> </ul>
<b>Your General Manager has been hired</b>		
	<ul style="list-style-type: none"> <li><input type="checkbox"/> Onboard GM per the Mission Transition Plan</li> <li><input type="checkbox"/> Create delegation and transition plan from Working Board to Governance Board based on store and GM needs, being careful to clarify roles and timelines (<i>Note: full transition to Governance Board may take years; intentional planning here can avoid many painful moments for the Board and GM</i>)</li> <li><input type="checkbox"/> Support and hold GM accountable as they implement operations plan</li> <li><input type="checkbox"/> Update and adjust committees: <ul style="list-style-type: none"> <li>▪ <b>Keep:</b> Finance, Executive Review, Fund Development</li> <li>▪ <b>Retire:</b> GM Hiring, Mission Transition, Business Development</li> <li>▪ <b>Evolve:</b> Member-owner Outreach to Member-owner Linkage</li> <li>▪ <b>Ad hoc:</b> Elections</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Transfer responsibility for store planning and operational planning to GM, being ready to support with whatever time, expertise is requested by GM</li> <li><input type="checkbox"/> Staff hiring</li> <li><input type="checkbox"/> Staff onboarding/training</li> <li><input type="checkbox"/> Vendor account set up</li> <li><input type="checkbox"/> Service contracts</li> <li><input type="checkbox"/> Key store systems (admin, finance, inventory, HR, marketing)</li> <li><input type="checkbox"/> POS set up</li> <li><input type="checkbox"/> Store set up, setting product</li> </ul>

Co-op Organizing	Governance	Business Development
<b>Construction is finished; final stretch!</b>		
<ul style="list-style-type: none"> <li><input type="checkbox"/> Coordinate volunteer support for opening day</li> <li><input type="checkbox"/> Build community excitement about co-op and opening day</li> <li><input type="checkbox"/> Plan grand opening celebration for 4–8 weeks post-opening</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Approve opening date per GM</li> <li><input type="checkbox"/> Closely monitor cash status and raise additional capital as needed to cover unanticipated costs</li> <li><input type="checkbox"/> Track and support GM’s progress toward final store implementation and operations</li> <li><input type="checkbox"/> Approve a dashboard for GM to use to provide key financial indicators easily during first months/year of operations <i><u>[Columinate Dashboard template]</u></i></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Support with whatever time, expertise is requested by GM</li> <li><input type="checkbox"/> Staff hiring</li> <li><input type="checkbox"/> Staff onboarding/training</li> <li><input type="checkbox"/> Vendor account set up</li> <li><input type="checkbox"/> Service contracts</li> <li><input type="checkbox"/> Key store systems (admin, finance, inventory, HR, marketing)</li> <li><input type="checkbox"/> POS set up</li> <li><input type="checkbox"/> Store set up, setting product</li> </ul>
<b>OPENING DAY!</b>		
<ul style="list-style-type: none"> <li><input type="checkbox"/> Celebrate!</li> <li><input type="checkbox"/> Support and promote opening day—“join the co-op!”</li> <li><input type="checkbox"/> Coordinate volunteer support for grand opening celebration</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Celebrate!</li> <li><input type="checkbox"/> Support GM and staff as they settle into store operations</li> <li><input type="checkbox"/> Closely monitor cash status and ensure adequate working capital</li> <li><input type="checkbox"/> Support Grand Opening celebration</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Celebrate!</li> </ul>





## FOOD CO-OP INITIATIVE

New co-ops start here.

### OUR VISION

A world where all communities have the power and ability to build a thriving cooperative food system that provides them with the food they need and want.

### OUR MISSION

We partner with communities to build a more just food system, providing critical support as they organize and open community-owned grocery stores.

[www.fci.coop](http://www.fci.coop) | [info@fci.coop](mailto:info@fci.coop) | 844-324-2667