



EXPANDING THE NUMBER OF OREGON'S LIQUOR RETAIL LOCATIONS

OPEN RECRUITMENT
FOR INDEPENDENT CONTRACTORS

OPEN RECRUITMENT

- A market-driven open recruitment process for appointing approximately 10 new liquor agent contracts in the Benton, Lane, and Linn County area
- Objective is to improve customer convenience by adding retail liquor locations with a measured, but consistent approach to growth

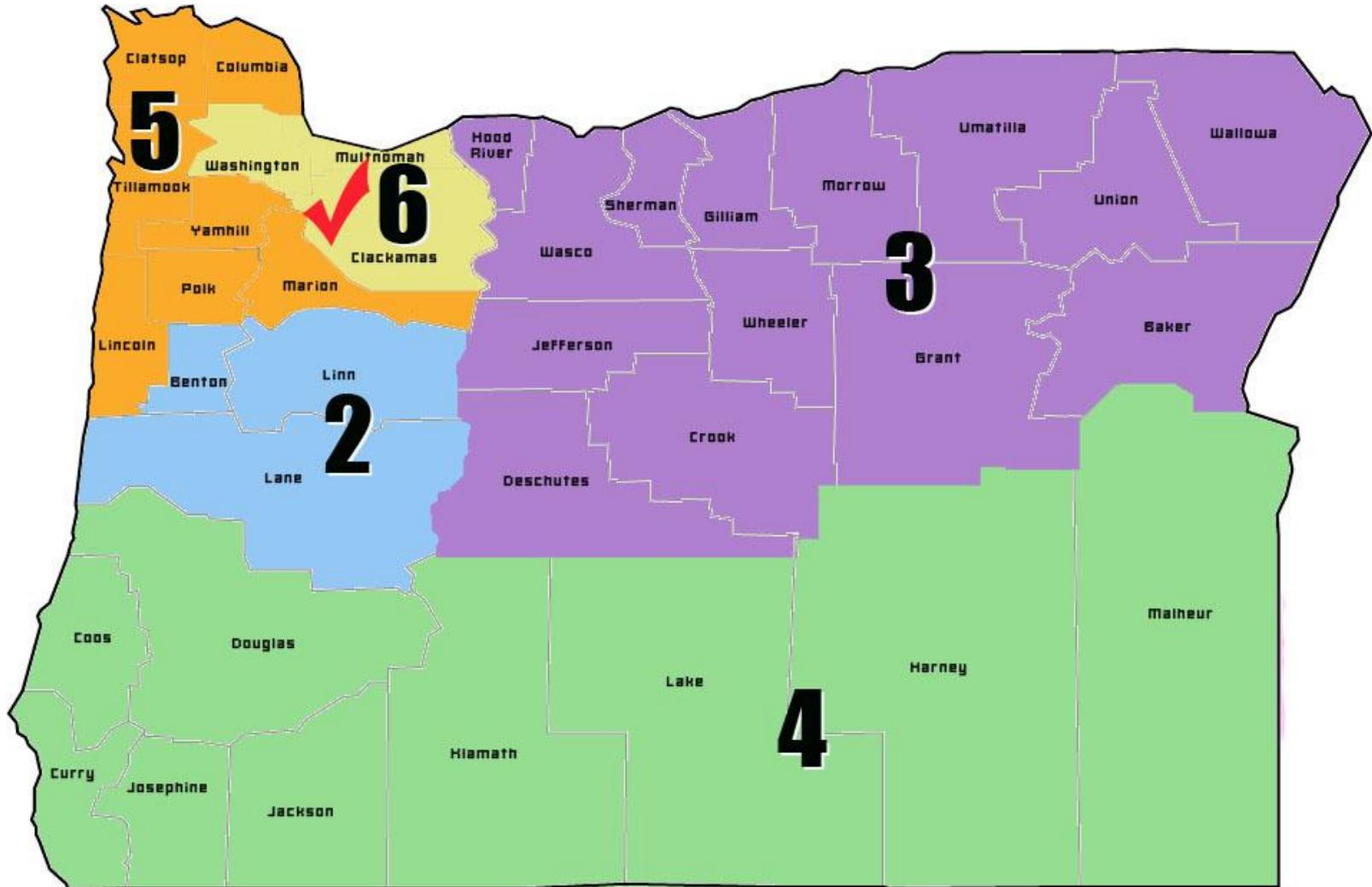
LIQUOR OUTLET DENSITY

- 30 years ago, one liquor store for every 12,000 Oregonians (1 to 12,000 ratio)

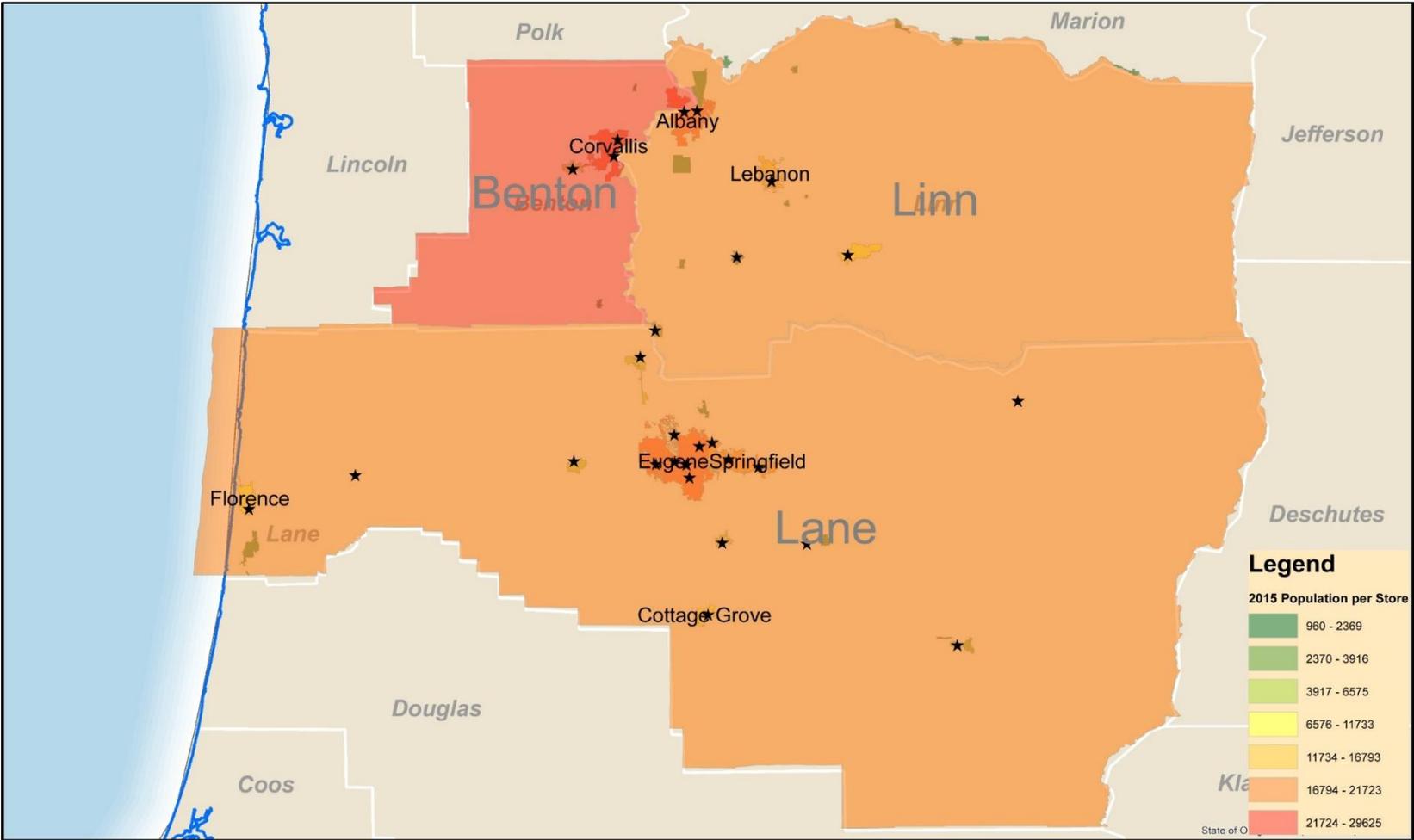
Area	Population*	# Stores	Population Per Store
Benton	87,819	3	29,273
Lane	359,308	18	19,962
Linn	118,974	6	19,829
Tri-County	566,101	27	20,967
Statewide	3,962,710	248	15,979

*2014 Data, Portland State University Population Research Center

PROPOSED PHASES OF RETAIL EXPANSION



BENTON, LANE, LINN COUNTIES



OREGON SPIRITS CONSUMER TRENDS

- More sophisticated
- Oregon's renowned mixology culture
- Greater demand for modern, consumer-friendly shopping
- Higher expectation of convenience
- Desire for wide selection of spirits
 - 2,100 regularly stocked
 - 2,000 special order



DIFFERENCES FROM EXISTING PROCESS

- Applicants may apply for multiple locations
 - Each will be considered separately
- Existing liquor store agents can only apply for more than two contracts under Open Recruitment
- Minor control plans
 - Applies to proposals that do not have a separate entrance for spirits
OAR 845-015-0148
- Open to a variety of different business models where customers can purchase spirits
 - Could include: adding a spirits section inside existing business, a traditional liquor store, a boutique retail location, etc.

EXISTING LIQUOR SALES MODELS

Types of Retail Locations

- 1) **Free standing** – Sells only distilled spirits and related items or sells distilled spirits, wine, beer and related items
(150 locations)
 - 2) **Located in another business**
 - a) **No separate entrance** - under the roof of another business
(91 Locations)
 - b) **Separate entrance** - under the roof of another business
(7 locations)
- * Beer and Wine sales need a separate liquor license

FREE-STANDING LIQUOR STORE



Cedar Mill Liquor Store



Separate Entrance for Liquor



Sunriver, OR



Sisters, OR



Same Entrance for Liquor





Lakeview, OR

Deli, Convenience, & Liquor



Willamina, OR

Lumber, Hardware, & Liquor

Pharmacy & Liquor



Sheridan, OR

Sporting Goods & Liquor



Crescent, OR

MARKET-FOCUSED CREATIVITY

- Innovation
- Entrepreneurs
- All types of retail models
- Widening range of choices for customers



SELECTION CRITERIA

- Business proposal
- Capital investment and financing
- Retail or business experience
- Knowledge of alcohol industry
- Location
 - Impact on existing agents
 - Convenience
- Estimated sales and revenue

TIMELINE

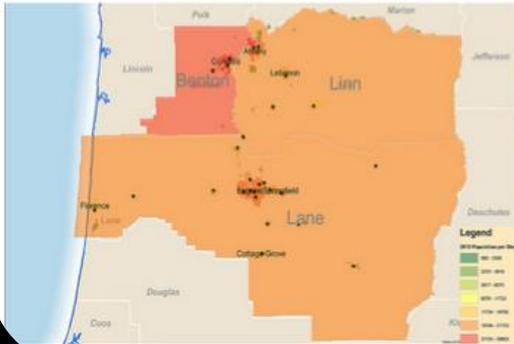
- Applicant Informational Meetings
- Open Recruitment Period
- Application Review
- Applicant Interviews
- Commission Selection
- Public notice at Commission-approved location
- Final approval of store opening (14 days after posting)
 - If no significant public opposition
- If significant public opposition
- August 3rd – Today!
- 08/15/16 – 10/14/16
- 10/17/16 to 11/18/16
- 11/28/16 to 12/2/16
- December Commission Meeting
 - Scheduled Dec. 14 & 15
- After Commission Selection
- January 2017
- Return before the Commission for final decision

More info on the web: Oregon.gov/OLCC

OREGON.GOV

TEXT SIZE: A+ A- A • TEXT ONLY TRANSLATE - Google™ Custom Search Find

New Retail Liquor Location Opportunities in Benton, Lane, & Linn Counties



OLCC's retail liquor expansion begins August 15, 2016 for Benton, Lane, & Linn counties.

The process of open recruitment is a new tool designed to foster retail liquor proposals. OLCC is looking for creative, innovative proposals that could include a variety of different models such as adding spirits to an existing retail store, a traditional stand-alone liquor store, or a boutique store.

[More on Open Recruitment for Benton, Lane, & Linn Counties](#)

Subscribe to email alerts and receive updates when new information is available

Liquor Stores & Products

Laws & Rules

Beer/Wine (Privilege) Tax

Recreational Marijuana in Oregon

Limited amounts of recreational marijuana can now be purchased through Oregon medical marijuana dispensaries by adults 21 and older.

[Recreational Marijuana Rules](#)

[Recreational Marijuana Licensing](#)

[Recreational Marijuana in Oregon](#)

[Recreational Marijuana Sales](#)

[Educate Before You Recreate - whatslegaloregon.com](#)



Search Liquor Stores & Distilled Spirits Online

Search www.oregonliquorsearch.com for distilled spirits by brand, category such as vodka or cognac, or by liquor store.



Your Liquor Dollars Work for Oregon

Liquor revenue supports state, city, and county programs. These dollars help to fund education, law enforcement, public health programs and more.

[Where Liquor Revenue Goes](#)

[City and County Revenue Distribution](#)

[\\$1 Billion Record-breaking liquor sales in 2013-15](#)



Hot Topics

NEW*: [Customer Service Survey](#)

NEW*: [Retail Expansion in Lane, Linn, & Benton Counties](#)

NEW*: [Oregon Bottle Bill Redemption Value Increases to 10 Cents Beginning April 1, 2017](#)



[Oregon's Bottle Bill](#)

[Job Opportunities](#)

[Purchasing and Contracts](#)

[Community Partners](#)

[Getting Help - Support and Treatment Services](#)

Agency Overview

OLCC's Distilled Spirits Program

Contact Retail Services

Liquor Stores & Products Home Page

OLCC Website



Open Recruitment - Liquor Retail Locations

[Overview](#)

[Open Recruitment Meeting Calendar](#)

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Sign up for email alerts

Overview

Phase 2 of Open Recruitment will begin August 15, 2016 for Benton, Lane, and Linn Counties

Overview of Retail Liquor Locations:

- [Advertisement](#)
- [Information Sheet](#)
- [Retail Sales Agent Agreement and Criteria](#)

Application Information

Application Packets:

- **Individual**
 - [Individual Application](#)
- **LLC**
 - [LLC Application](#)
 - [Managing Member - Individual History Packet](#)
 - [Premises Manager - Individual History Packet](#)
- **Corporation**
 - [Corporation Application](#)
 - [Individual Supervising Premises Manager - Individual History Packet](#)
 - [Premises Manager - Individual History Packet](#)

Additional Information:

- [Retail Sales Agent Agreement \(07/16\) - SAMPLE](#)
- [Compensation for Retail Sales Agents](#)
- [Authorized Related Items List for Exclusive Stores](#)
- [Product Category Sales Data \(Excel\)](#)

Phase 1 of open recruitment ended for the Portland-Metro area January 15, 2016.



OPENINGS FOR OPERATORS OF NEW RETAIL LIQUOR LOCATIONS

OLCC is recruiting applicants for new retail liquor locations. The open recruitment process is a market-driven effort to improve customer convenience by expanding retail liquor locations with a measured, but consistent amount of growth.

The Oregon Liquor Control Commission is accepting applications and aiming to add 10 new retail liquor locations in the following counties:

**Benton County
Lane County
Linn County**

Applicants are evaluated on background, knowledge and work experience in:

- **Retail business management**
- **Inventory/cash management**
- **Retail sales and operation**
- **Customer service/public relations in a retail environment**
- **Financial ability to open and operate a retail liquor location**

A detailed business plan will be required as part of the application process.

For additional information on open recruitment for new retail liquor locations and application information, visit:

http://www.oregon.gov/OLCC/LIQUORSTORES/Pages/liquorsalesoutlets_openrecruitment.aspx

Questions can be directed to OLCC.RetailServices@oregon.gov or call 503-872-5020 (toll-free 1-800-426-2004, Dept # 62). Provide your name, email address and phone number. Applications can also be picked up at 9079 SE McLoughlin Blvd., Portland, OR 97222.

An application with a business plan must be received at OLCC's main office in Portland at the above address, by 5:00 PM, Friday, October 14, 2016. Applications received after this deadline will not be accepted. Additional open recruitments for these areas and others in the state may occur in the future.



INFORMATION SHEET

FOR NEW RETAIL LIQUOR LOCATIONS

The Commission will consider proposals for retail liquor locations to be operated as exclusive or non-exclusive in Clackamas, Multnomah and Washington counties. These locations may be:

- Exclusive - Traditional retail liquor locations selling only distilled spirits and authorized related items (i.e. mixers, tobacco, glassware)
- Non-Exclusive - Distilled spirits are sold in conjunction with another business which may include beer, wine and growers

Keep in mind:

- There are limitations on who can be appointed a retail sales agent. Please review the document "Acknowledgement of Eligibility" in the application packet for further information.
- It may take years to build the business.
- Sales vary within seasons and economic conditions.
- An exclusive liquor store can only sell authorized related items. (This may be limited by leasing restrictions).
- Licensees (i.e. restaurants, bars) are able to purchase distilled spirits at any retail liquor location within the state.
- A separate Off-Premises Sales license must be obtained to sell beer, wine, cider and some vermouths. Sales of beer, wine, cider and vermouth to licensees is prohibited.
- Agents will pay all expenses to operate the liquor store from monthly compensation.
- The state provides the distilled spirit inventory. Retail sales agents do not purchase or own the distilled spirits inventory.
- Cities and counties may require other license types or permits to operate in their jurisdiction.

SALES AND COMPENSATION

Sales will vary based on the location and the number of products available for sale.

Compensation calculated based on store type		
Exclusive Liquor Store	OR	Non-Exclusive Liquor Store
Compensation for an exclusive agent operating this type of store is a fixed monthly base rate based on liquor sales ranging from 14.25% of the first \$10,000 of monthly distilled spirit sales to \$2,700, plus two variable rates. Currently, the variable rate for consumer sales is 8.15% and for licensee sales is 6.36%. Variable rates are periodically adjusted during a biennium to meet Legislative mandates.	OR	Compensation for a non-exclusive agent is 14.25% of the first \$10,000 of monthly distilled spirit sales, plus two variable rates. Currently, the variable rate for consumer sales is 8.15% and for licensee sales is 6.36%. Variable rates are periodically adjusted during a biennium to meet Legislative mandates.
Please see Compensation for Retail Sales Agents document.		

CONDITIONS OF APPOINTMENT

- A. Hours of operation to sell distilled spirits: No earlier than 7 a.m. or no later than 10 p.m. any day of the week; required minimum of 8 hours per day Monday-Saturday which must include the hours between 12 noon and 6 p.m. OLCC recommends retail liquor locations be open on Sunday and holidays to meet consumer convenience and demand.
- B. Present a Statement of Funding Sources and supporting documentation showing adequate finances for:
 1. Start-up costs, operating expenses (rent, payroll, etc.), store improvements, fixtures and equipment, etc.
 2. Purchase a point-of-sale cash register computer system or reconfigure an existing computer system to meet reporting requirements to OLCC. The system must transmit daily liquor sales and daily liquor inventory to OLCC beginning on the opening date. The required daily inventory information will also be posted to Oregon Liquor Search. The bank card processing system must be separate from any other computer system and comply with Payment Card Industry Data Security Standards from the opening date.

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355

7

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RETAIL SALES AGENT SELECTION PROCEDURE AND CRITERIA

Selection Procedure:

- 1) When the Commission fills a retail sales agent vacancy, the Commission seeks applications from the public.
- 2) A vacancy is advertised via a variety of methods, i.e. internet postings, other online media, or newspapers.
- 3) After an application deadline, applications will be screened according to selection criteria and qualified applicants will be selected for interview. The interview committee scores the applicants and ranks them by qualifications. The interview committee recommends finalists who are most qualified based on the selection criteria. From the finalists, the commission appoints a retail sales agent. A public presentation at a commission meeting will be required.
- 4) An appointed retail sales agent must submit retail liquor store improvement or business plan for approval, enter into a Retail Sales Agent Agreement, purchase fixtures and equipment, and begin operation of a retail liquor store on the date the Commission specifies.

Selection Criteria:

When the Commission selects a retail sales agent, the Commission evaluates the knowledge, skills and abilities of all applicants in the following areas:

- a) Retail business experience including, but not limited to, responsibility for inventory control, cash accountability, supervision of personnel and customer service.
- b) Knowledge of retail operations or business management, including study or training in those or related fields;
- c) Customer service skills and ability to communicate and work effectively with the public;
- d) The applicant's and/or representative's record of felony conviction, conviction of crime relating to money management fraud, or a history of conviction of crimes relating to the abuse of alcohol or controlled substances;
- e) The applicant's financial ability to purchase or lease and equip the retail liquor store at a Commission approved location which includes but not limited to start-up costs, operating expenses (rent, payroll, etc.), store improvements fixtures and equipment.

Agency Overview ▾

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Application Forms

- Individual Application

- Single person applying for a Retail Sales Agent Agreement
- An Individual Application is required with a detailed business plan

- LLC Application

- LLC applying for a Retail Sales Agent Agreement
- An LLC Application is required plus:
 - An Individual History packet from one managing member
 - An Individual History packet from the premises manager (if applicable)
 - A detailed business plan

- Corporation Application

- Corporation applying for a Retail Sales Agent Agreement
- A Corporation Application is required plus:
 - An Individual History packet from one individual who supervises the premises manager (i.e. Regional, District, Area Manager, other)
 - An Individual History packet from the premises manager
 - A detailed business plan

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RETAIL SALES AGENT AGREEMENT FOR STORE NO. _____

This Retail Sales Agent Agreement ("Agreement") is made between the State of Oregon by and through its Oregon Liquor Control Commission ("Commission") and the Retail Sales Agent ("Agent") appointed below.

DEFINITIONS

- "Administrator" means the Administrator of the Commission appointed pursuant to ORS 471.720, and as referred to as Executive Director or Director in OLCC rules and in this Agreement. The term "Directors" in section 14 refers to all State of Oregon Directors, including the Administrator.
- "Commissioners" means the individuals appointed to the Commission pursuant to ORS 471.705 and meeting pursuant to ORS 471.715.
- "Commission" means the Oregon Liquor Control Commission including Commissioners and any employee of the Commission acting within the course and scope of the duties delegated to that employee by the duly appointed Commissioners.
- "Retail Sales Agent" means an individual person or legal entity appointed by the Commission pursuant to ORS 471.750 and which enters into an Agent Agreement as an independent contractor to sell packaged distilled spirits on behalf of the Commission in a Retail Liquor Store. The term "Agent" is used interchangeably with "Retail Sales Agent" throughout this Agreement, except in section 14.
- "Retail Liquor Store" or "Store" is a premises or a specific area in a premises the Commission approves under section 4 for the sale of packaged distilled liquor (also referred to as distilled spirits or liquor) for off-premises consumption.
- "Agent Agreement" or "Agreement" is a written contract, which includes all addenda, amendments and the Retail Operations Manual, between the Commission and a Retail Sales Agent that specifies the terms, conditions, and obligations between the parties.
- "Retail Operations Manual" or "Manual" means the Manual described in section 8 including all revisions adopted by the Commission that governs the operations of a Retail Liquor Store.
- "Proposal" means a new Agent's plan for a Store which is presented during the application process.
- "New Appointment Period" means the first 12 months of this Agreement, but does not apply in the case of a reappointment of Agent.
- "Agent's Representative" means an individual who represents a legal entity in the operations of the Store, and can either be a regional, district or area manager, managing member, member or a premises manager.

AGREEMENT

1. **AGREEMENT APPOINTS AGENT AS A RETAIL SALES AGENT.** Pursuant to its authority under ORS 471.750, the Commission hereby appoints _____ as a Retail Sales Agent for the purpose of selling distilled spirits at the Retail Liquor Store location set forth below.
2. **DURATION OF AGREEMENT.** Unless terminated earlier in accordance with its terms, the duration of this Agreement is from Agent's start date on _____ to _____. This Agreement is effective on _____, which is on or after the date this Agreement has been signed by each party and all necessary State approvals have been obtained.
3. **TYPE OF RETAIL LIQUOR STORE.** Agent is appointed to operate a Retail Liquor Store for the Commission, to be known as Store No. _____. This Store will be classified as: _____ Exclusive Retail Liquor Store or _____ Non-Exclusive Retail Liquor Store or _____ Non-Exclusive Satellite Retail Liquor Store. If this appointment is to operate a non-exclusive Retail Liquor Store, the nature of the adjunct business is: _____. A non-exclusive Agent shall not change the nature of the adjunct business without prior written approval of the Commission.

COMPENSATION

EXCLUSIVE AGENT COMPENSATION

Fixed Base Allowance

<u>Store Class/Annual Sales</u>	<u>Fixed Base</u>
I Up to \$209,999	14.25% of the first \$10,000 monthly sales
II \$210,000 - \$449,999	\$1,660
III \$450,000 - \$749,999	\$1,920
IV \$750,000 - \$1,049,999	\$2,348
V \$1,050,000 - \$1,649,999	\$2,440
VI \$1,650,000 and up	\$2,700

Variable Sales Commission

Currently, 8.15% consumer and 6.36% licensee.

NON-EXCLUSIVE AGENT COMPENSATION

Fixed Base Allowance

Fixed Base
14.25% of the first \$10,000 monthly sales

Variable Sales Commission

Currently, 8.15% consumer and 6.36% licensee.

COMPENSATION ESTIMATES

EXCLUSIVE LIQUOR STORE COMPENSATION							
Exclusive Store Total Annual Sales	Base Allowance		Variable Sales Commission (percentage column heading reflects Consumer sales as a % of total store sales)				
			100%	95%	90%	85%	80%
Up to \$209,999	\$ 17,100*	plus	\$0 - \$17,115	\$0 - \$16,927	\$0 - \$16,739	\$0 - \$16,551	\$0 - \$16,363
\$210,000 - \$449,999	\$ 19,920	plus	\$17,116 - \$36,675	\$16,928 - \$36,272	\$16,740 - \$35,869	\$16,551 - \$35,467	\$16,364 - \$35,064
\$450,000 - \$749,999	\$ 23,040	plus	\$36,676 - \$61,125	\$36,273 - \$60,454	\$35,870 - \$59,782	\$35,467 - \$59,111	\$35,065 - \$58,440
\$750,000 - \$1,049,999	\$ 28,176	plus	\$61,126 - \$85,575	\$60,455 - \$84,635	\$59,783 - \$83,695	\$59,112 - \$82,756	\$58,441 - \$81,816
\$1,050,000 - \$1,649,999	\$ 29,280	plus	\$85,576 - \$134,475	\$84,636 - \$132,998	\$83,696 - \$131,521	\$82,757 - \$130,045	\$81,817 - \$128,568
\$1,650,000 - \$2,000,000	\$ 32,400	plus	\$134,476 - \$163,000	\$132,999 - \$161,210	\$131,522 - \$159,420	\$130,046 - \$157,630	\$128,569 - \$155,840
\$2,000,000 - \$2,500,000	\$ 32,400	plus	\$163,001 - \$203,750	\$161,211 - \$201,513	\$159,421 - \$199,275	\$157,631 - \$197,038	\$155,840 - \$194,800
\$2,500,000 - \$3,000,000	\$ 32,400	plus	\$203,751 - \$244,500	\$201,514 - \$241,845	\$199,276 - \$239,130	\$197,039 - \$236,445	\$194,801 - \$233,760

NON-EXCLUSIVE LIQUOR STORE COMPENSATION							
Non-Exclusive Store Total Annual Sales	Base Allowance		Variable Sales Commission (percentage column heading reflects Consumer sales as a % of total store sales)				
			100%	95%	90%	85%	80%
Up to \$209,999	\$ 17,100*	plus	\$0 - \$17,115	\$0 - \$16,927	\$0 - \$16,739	\$0 - \$16,551	\$0 - \$16,363
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* Based on distilled spirit sales of \$10,000 or more. The fixed base amount will be less when sales are below than \$10,000 per month.

OTHER BENEFITS

- OLCC pays for shipping from warehouse to the retail location
- OLCC pays for credit card fees associated with spirits sales
- OLCC owns the distilled spirits inventory – the liquor agent sells it
- OLCC will ship a split case of products to the retailer
 - Allows retailer to carry small quantities of new or high-end products
 - Allows retail location to offer a wider selection
- Special orders are available to help customers find just the right product
- Uniform pricing across the state

WHAT YOU CAN DO

- Identify location
- Create a detailed business plan
- Contact OLCC Retail Services staff with questions
 - 503-872-5020, OLCC.retailservices@Oregon.gov
- Put together a minor control plan (if necessary)
- Contact local government
 - Check for local zoning, permitting, & business license requirements

Questions?

