

Liquor/Beer License Application

Beer
(Agenda Item Number)

85805
(Legistar file number)

Ation

LICLIB-2024-0095
(License number)

City of Madison Clerk
210 MLK Jr Blvd, Room 103
Liquor,
Cider Madison, WI 53703

licensing@cityofmadison.com

608-266-4601

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/AI	der i	Distri	ct #		- /	Polic	P 5	ecto	r)
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						0.025	8050-3		

Class A: ☐ Beer, ☐ Liquor, ☐ Cider Class B: ☐ Beer, ☒ Liquor, ☐ Class C Wine

Sec	List the name of your ☐ Sole Proprietor, ☐ Partnership, ☐ Corporation/Nonprofit Organization or ☒ Limited Liability Company exactly as it appears on your State Seller's
	Permit.
	Forward Craft and Coffee, LLC
2.	Trade Name (doing business as) Forward Craft & Coffee
3.	Address to be licensed 2166 Atwood Ave Madison, WI 53704
4.	Mailing address 1906 Gulseth St Madison, WI 53704
5.	Anticipated opening date Already Open
6.	Is the applicant an employee or agent of, or acting of behalf of anyone except the applicant named in question 1?
	□ No ☑ Yes (explain) Dan Podell Owner

Section B—Premises

business?

7.

8. Describe in words the building or buildings where alcohol beverages are to be sold and stored. Include all rooms including living quarters, if used, and any outdoor seating used for the sales, service, and/or storage of alcohol beverages and receipts. Alcohol beverages may be sold and stored only on the premises as approved by Common Council and described on license.

Does another alcohol beverage licensee or wholesale permitee have interest in this

No Yes (explain)

Building is an existing business (Forward Craft & Coffee) that currently has a Class B License for beer. We are a coffee shop and beer bar currently that sells primarily coffee, but would like to expand in a small offering of cocktail options. All liquor would be sold inhouse, no removal of liquor off the premises. No outdoor seating.

9.	. Applicants for on-premises consumption only. Estimated capacity (patrons and employees):					
	Indoor: 50 (Ma	x occupancy 133) Outdo	or:			
10.	Describe existi	ng parking and how parki	ng lot is to be monitored.			
	Street parking ar	nd limited parking lot parking	when available (5 stalls). Curren	tly no onsite parking lot		
	available due to construction of a development next door to us, using the stalls for construction storage.					
11.	Was this premi	ses licensed for the sale o	of liquor or beer during the p	ast license year?		
	□ No Ye	es, license issued to Forwa	ard Craft and Coffee, LLC	(name of licensee)		
This	section applies	Drate Information to corporations, nonprofirships and partnerships, s	t organizations, and Limited skip to Section D.	Liability Companies		
12.	Name of liquor	license agent Daniel Pod	ell			
		hich agent resides Madiso		_		
14.	How long has t	he agent continuously res	sided in the State of Wiscons	in? 39 Years		
15.	Has the liquor	license agent completed t	he responsible beverage ser	ver training course?		
	☐ No, but will	complete prior to ALRC r	neeting 🛮 Yes, date comp	oleted <u>January 2022</u>		
16.	State and date	of registration of corpora	tion, nonprofit organization,	or LLC.		
	Wisconsin, Feb	ruary 2021	· · · · · · · · · · · · · · · · · · ·			
17.	*********	low list the directors of yo	our corporation or the memberach director/member.	ers of your LLC.		
	Title	Name	City and State of Reside	ence		
	Owner	Daniel Podell	Madison, WI			
	Owner	Chad Walhood	Madison, WI			
	Owner	Melissa Moss	Portland, OR			
18.	8. Registered agent for your corporation or LLC. This is your agent for service of process, notice or demand required or permitted by law to be served on the corporation. This is not necessarily the same as your liquor agent. Daniel Podell					
19.	Is applicant a s	subsidiary of any other co	rporation or LLC?			
	⊠ No □ Ye	s (explain)				
20.			rector, any stockholder, lique est in any other alcohol beve			
	□ No 🛛 Ye	es (explain) Considering o	f alcoholic cider			

	tion D—Bus What type of ⊠ Tavern	establishme	nt is contemp		ior Store	l Grocery St	ore	
	☐ Tavern ☐ Nightclub ☐ Restaurant ☐ Liquor Store ☐ Grocery Store ☐ Convenience Store without gas pumps ☐ Convenience Store with gas pumps							
			•	ee shop that also		•	•	sales
	4-0.0							iaics
22.	Private organizations (clubs): Do your membership policies contain any requirement of "invidious" (likely to give offense) discrimination in regard to race, creed, color, or national origin? ☐ No ☐ Yes							
23.	Hours of ope	ration: please	e enter openi	ing and closing	times in the t	able below.		
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday]
	7a - 6p	7a - 12p	7a - 10p	7a - 10p	7a - 10p	7a - 10p	7a - 10p	
	(Class B on	ly) Enter belo	w any hours	when food ser	vice will not b	e available,	if applicable	1
	-		-	-	-	-	-	
This (cor. 24. 25.	 Section E—Consumption on Premises This section applies to Class B and Class C applicants only. Class A license applicants (consumption off premises) may skip to Section F. 24. Indicate any other product/service offeredCoffee, Espresso Drinks, Bakery items, premade snacks. 25. All restaurants and taverns serving alcohol must substantiate their gross receipts for food and alcohol beverage sales broken down by percentage. (Note: Non-alcoholic drinks are classified as "Food.") New establishments estimate percentages:30 % Alcohol65 % Food/Coffee5 % Other If applicable, describe "Other":Retail/Merchandise Do you have written records to document the percentages shown? □ No 文 Yes You may be required to submit documentation verifying the percentages indicated. 26. Do you plan to have live entertainment? ☒ No □ Yes—what kind? 							
27.	If planned entertainment includes live music (except solo acoustic), a DJ, or a designated dance floor, please also complete an Entertainment License. Section F—Required Contacts and Filings 27. I understand that liquor/beer license renewal applications are due April 15 of every year, regardless of when license was initially granted. □ No ☒ Yes 28. I understand that I am required to host an information session at least one week before the ALRC meeting. □ No ☒ Yes							
29.	I agree to co	ntact the Alde	erperson for	this location to sion. \square No \square		pplication an	d to invite	

30.	I agree to contact the Police Department District Captain for this location prior to the ALRC meeting. \Box No \boxtimes Yes
31.	I agree to contact the Deputy Clerk prior to the ALRC meeting. \square No \boxtimes Yes
32.	I agree to contact the neighborhood association representative prior to the ALRC meeting. $\hfill\square$ No \hfill Yes
33.	I intend to operate under the alcohol license within 180 days of the Common Council granting this license. The license shall be considered surrendered if not issued within 180 days of being granted. \square No \boxtimes Yes
34.	I understand we must file a Special Occupational Tax return (TTB form 5630.5) before beginning business. [phone 1-800-937-8864] $\ \square$ No $\ \boxtimes$ Yes
35.	I understand a Wisconsin Seller's Permit must be applied for and issued in the same name as that shown in question 1, above. [phone 608-266-2776] $\ \square$ No $\ \boxtimes$ Yes
36.	Is the applicant indebted to any wholesaler beyond 15 days for beer or 30 days for liquor? $\hfill \boxtimes$ No $\hfill \square$ Yes
Sec	ction G—Information for Clerk's Office
37.	This application is for the license period ending June 30, 20_25
38.	State Seller's Permit <u>4</u> <u>5</u> <u>6</u> - 1030873357-04
39.	Federal Employer Identification Number86-1875376
40.	Who may we contact between 8 a.m. and 4:30 p.m. regarding this license?
	Contact person _Dan Podell
	Business phone920-470-7036 Business e-mail address
	drink@forwardcraft.com Preferred languageEnglish
	If needed, a qualified interpreter can be provided at no charge to you. Would you like an
	interpreter? ☐ Yes (language:) ☑ No (If you answer no and you do require an interpreter, the ALRC will refer your application to a subsequent meeting and this may delay your application process)
	Si usted requiere o necesita un/a intérprete, nosotros podemos proveer un/a intérprete sin costo alguno. ¿Le gustaría tener un/a intérprete? ☐ Sí, lenguaje: ☐ No. Si usted escoge "no" en la solicitud/aplicación, y usted sí requiere un/a intérprete, el comité remitirá su solicitud para una nueva junta y esto puede atrasar el proceso de su
	solicitud.
41.	Corporate attorney, if applicable: Name Jeffery Glazer
	Phone 608.561.4304 E-mail jmglazer@ogs.law

MOTICE: Completed application are due by noon of the third Monday (fourth, if the Clerk's office is closed on the third Monday) to get on the agenda for the proceeding months Alcohol License Review Committee. A completed application must be accompanied by the following items:				
☐ Copy of State Seller's Permit (Not Business Tax Registration Certificate), ☐ Appointment of Agent (if Corp/LLC), ☐ Member background investigation forms, ☐ Articles of Incorporation (if Corp/LLC), ☐ Floor Plans, ☐ Copy of Lease, ☐ Business Plan, and ☐ Sample Menu (if applying for Class B license)				
If required items are missing, the application Office until all requirements are submitted. I	n will not be considered complete and will not be acc No exceptions are made.	cepted by the Clerk's		
Read carefully before signing: Under penalty provided by law, the applicant states that the above information has been truthfully completed to the best of the knowledge of the signer. Signer agrees to operate the business according to law, and that the rights and responsibilities conferred by the license(s), if granted, will not be assigned to another. Lack of access to any portion of licensed premises during inspection will be deemed a refusal to permit inspection. Such refusal is a misdemeanor and grounds for revocation of this license.				
Penalty for materially false application information: Any person who knowingly provides materially false information on this application may be required to forfeit not more than \$1,000. (Officer of Corporation/Member of LLC/Partner/Sole Proprietor) (Date)				
Clerk's Office checklist for complete a	pplications			
 □ WI Seller's Permit Certificate (matching articles of incorporation) □ FEIN □ Written description of premises 	 □ Background investigation form(s) □ Form for surrender of previous license □ *Articles of Incorporation □ *Appointment of Agent * Corporation/LLC only 	☐ Floor Plans ☐ Lease ☐ Business Plan ☐ **Sample Menu ** Class B only		
Upon Application Submission, the Clerk's Office issued to the application:				
☐ Orange sign ☐ Orange business card				
☐ "Applying for a Liquor/Beer License in the City of Madison" brochure with contact information				
Date complete application filed with Clerk's	Office			
Date of ALRC meeting Da	te license granted by Common Council	···		
Date provisional issued Date license issued				

Coffee

12oz / 16oz

LATTE

\$5.00 \$4.75

AMERICANO

\$4.00 \$3.50 /

CHAI

\$5.50 \$5.00

MIEL

\$5.75 / \$6.25

MOCHA

\$5.75 / \$6.25

CAPPUCCINO

\$5.00

\$5.75 **MATCHA LATTE**

ESPRESSO

Double \$2.75

\$3.00 / \$3.25 DRIP COFFEE REFILLS \$1.50

Alternative Milk - Soy or Oat: \$1.00 Additional Syrup Flavor: \$0.75

nitro Cold Brew 80z / 120z / 160z

Cold Brew (df)

Sweet and Creamy (df)

Butterfinger

Apple Pie(df)

\$4.50 / \$5.00 / \$5.50

Includes a <u>50</u>2 pour of each flavor - \$14.00

Cold Brew Flight

\$4.75 / \$5.25 / \$5.75

Single 502 Pours All other flavors - \$4.00 Regular - \$3.50

\$5.00 / \$6.00 / \$7.00

\$5.00 / \$6.00 / \$7.00

(df) = dairy free

Specials!

The Fox Paw

Mocha made w/ Ghirardelli chocolate & blood orange Monin syrup

made with oat milk

160z \$7.60

160z \$6.50 Latte made w/ Monin pumpkin syrup **Pumpkin Spice Latte**

Chaider

Can be made hot or iced

Chai concentrate and apple cider with a sprinkle of

160z \$6.00 cinnamon and nutmeg Can be made hot or iced

Apple Cider

Topped with cinnamon and nutmeg San be made hot or iced

160z \$5.00

Hot Tea 160z \$3.50 Cinnamon Orange (Herbal) English Breakfast (Black) Green Mango (Green)

\$4.00 / \$4.25 lced Tea

English Breakfast (Black) Red Berries (Herbal)

Lemonade \$4.00 / \$4.25

Rose, Chipotle Pineapple Berry Violet, Strawberry,

13 Anti-Hero American IPA • ABV: 6.7% Revolution Brewing • Chicago, Il

5oz \$3 / 8oz \$4 / 16oz \$6

14 The Higher We Flew Double Hazy IPA • ABV: 7.5% Sway Brewing • Baileys Harbor, IL

5oz \$4 / 8oz \$6 / 16oz \$8

15 Nosferatu

Red Imperial IPA • ABV. 8.0% . . Great Lakes Brewing Co. • Cleveland, OH

50z \$4.5" 80z \$6.5 / 120z \$8.50

16 Gator Belts & Patty Melts IPA - ABV: 6.5%

Hop Butcher For The World • Chicago, IL

5oz \$4 / 8oz \$6 / 16oz \$8.50

17 Peach Orange Mango

Kettle Sour • ABV: 4.4% Delta Beer Lab • Madison, WI 5oz \$5 / 8oz \$7 / 16oz \$9

18 Half Shell Hero (GF) Fruited Grape Sour • ABV: 5.0%

G-Five Brewing Co. • Beloit, WI

5oz \$5 / 8oz \$7 / 16oz \$9

19 Ope! Sourry

Sour- Raspberry Vanilla • ABV: 5.7% Ope! Brewing Co. • Milwaukee, WI

5oz \$4.50 / 8oz \$6.50 / 16oz \$8.50

20 Hazza (GF)

Watermelon Chili Lime Sour • ABV: 5% G-Five Brewing Co. • Beloit, Wi

5oz \$5 / 8oz \$7 / 16oz \$9

Beer Specials

Contains Alcohol Marst be



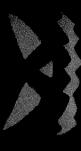
Michelada 1802 \$7.(

Narragansett Lager, Chamoy Rim,Michelada Mix (Tomato Juice & Spices)

Beermosa 1602 \$6.00

Narragansett Lager & 0.1







CRAFT

oi Falles

Horchata White Stout • ABV: 7.0% G-Five Brewing Co. • Beloit, WI

5oz \$5 / 8oz \$7 / 16oz \$9

oz Bomb!

Imperial Stout • ABV: 13.0% Prairie Artisan Ales • Kerbs, OK 5oz \$5 / 8oz \$7 / 12oz \$9

03 Oscar's Chocolate Oatmeal Stout Oatmeal Stout • ABV: 5.6%

Sand Creek Brewing • Black River Falls, WI

5oz \$3 / 8oz \$4 / 16oz \$6.50

o4 Coconut Deth

Imperial Stout • ABV: 14.3% Revolution Brewing Co • Chicago, IL

5oz \$7 / 8oz \$10

05 Ten Snack

Czech Pilsner • ABV: 3.5% Working Draft • Madison, WI 5oz \$3 / 8oz \$4 / 16oz \$6.50

os O, Umlaut!

Kolsch • ABV: 5.2% Starkweather Brewing • Madison, WI

5oz \$4/8oz \$5/16oz \$8

o7 Pinky Sweater

Pilsner • ABV: 5.5% Sketchbook Brewing Co • Evanston, IL

5oz \$3 / 8oz \$5 / 16oz \$6.50

08 Reverie Pils

Pilsner • ABV: 5.0% Monkless Belgian Ales • Bend, OR

5oz \$3 / 8oz \$5 / 16oz \$7

os Pumking

Pumpkin Beer 7 ABV: 8.68 Southern Tier Brewing Lak

502 \$4 / 802 \$6 1 (60)

10 Hollywood Nights (gf)

American IPA • ABV: 7.2% ALT Brew • Madison, WI

5oz \$4.50 / 8oz \$6.50 / 16oz \$8.50

11 THC Sparkling Water

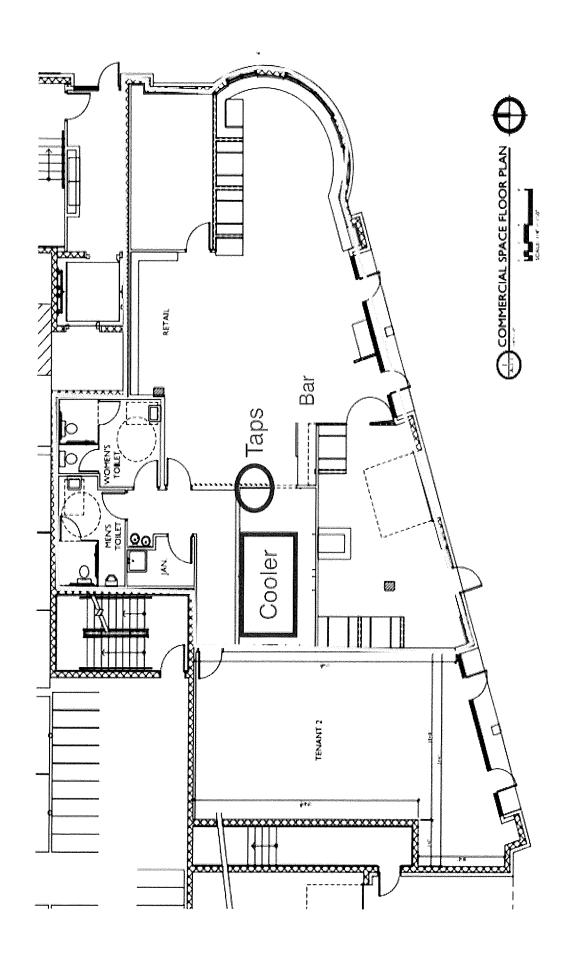
Strawberry Lemon • THC: 4.20mg Honey Bee Cannabis • Madison, WI

5oz \$3 / 8oz \$4 / 12oz \$6

12 Ektokooler

Hard Seltzer • ABV: 5.0% Eagle Park Brewing Co. • Milwaukee, WI

50z \$3 / 80z \$5 / 160z \$7



Forward Craft & Coffee

2022 Business Plan

12/08/2021

Last Updated: 2/10/2022

ADDRESS: 1906 Gulseth St. Madison, WI 53704

PHONE: 920-470-7036 | E-MAIL: drink@forwardcraft.com

WEBSITE: forwardcraft.com

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2022 Business Plan



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Executive Summary

A. Company and Background

Forward Craft & Coffee Placing an emphasis on craft beer and craft coffee, we will be serving a diverse portfolio of drink offerings that can be enjoyed both on and off premise. Beyond our product lines of coffee, beer, seltzers, ciders, and more, Forward Craft & Coffee looks to create an inclusive culture that produces a sense of belonging. Whether it's a morning cup of coffee, an afternoon pick-me-up, or a night out with friends, we look forward to becoming a part of Madisonians' lives.

B. Market Opportunity

Products

By combining the craft beer world with coffee, we want to offer a place where people can enjoy a cup of coffee in the evening, or a place to have a beer, cider, seltzer or non-alcoholic beverage at the same time. The marriage of the two industries will also present opportunities for us that our competition may not have access to. We will be able to mix unique coffee drinks alongside artisan barrel aged beer, or coffee flavorings with an IPA or seltzer. We also can create seasonal and specialty drinks that can combine the different products.

Accessibility

It can be difficult to find a sit-down location and get a quality cup of coffee in Madison after 5pm. At Forward Craft & Coffee, our hours of operation will give you the option to have that cup of coffee in the evening, as well as that snifter of beer.

The location also gives a range of options to access our shop: walking traffic, close proximity to the Madison bike trail system and electric bike rental station, free street parking on both Atwood Avenue and Dunning Street, and close proximity to bus stops.

The location also presents an opportunity to integrate with other local restaurants, retail shops and entertainment options. With proximity to The Barrymore Theater, Zion Church, Starkweather Brewery, One Barrel Brewing, and many restaurant choices; our business model will be able to coexist with these Madison staples.

Demographics

In addition to the product and accessibility opportunities above, Forward Craft & Coffee will be in a neighborhood whose residents have disposable income and engage in a social lifestyle - either as part of their daily routine or as part of a social activity. The demographic we target also sees value in supporting local businesses, goods and services. Our demographic also seeks out craft and artisan products over big business and national chain markets.

Total Addressable Market (TAM)

Madison Metro: 664,865

Atwood Neighborhood (600 block Williamson St. to 100 Block of Cottage Grove Rd.): 17,2923

Serviceable Addressable Market (SAM) Demographics and Data

Age: 21 - 65

Average Rent (Schenk - Atwood) - \$1,1801

Medium Home Value (Schenk - Atwood): \$260,000² (\$236,640³)

Local Businesses: 648³
Daytime Population: 16,400³

Average income per capita: \$38,7443

Average Household Size: 1.93

Median Age: 36.7³

2010-2018 Population Growth Rate: 1.2%3

Average Traffic: Williamson St. Daily Traffic: 17,7504

Bike Trail AADT: 1,553⁵ Pedestrian AADT: 186⁶

Total SAM Count labeled as "Wine and Food lovers": 19,000

Share of Market (SOM)

Forward Craft & Coffee has a goal of reaching 266 transactions per day. This would be 1.4% share of the market (SOM) from the SAM data reports of 19,000. The number 266 was chosen based on a sum total of our average daily transactional numbers based on industry averages, data found, and assumptions made for the 5 revenue channels we will be pulling from (Coffee, alcohol, food, retail and other).

Transactions goal per day: 266 or 1.4% of total SAM percentage. (19,000 / 266 = 1.4%) or

1.4% of the traffic data equals: Pedestrian: 3, Bike: 22, Vehicle: 249 = 274 total. Which also gets us slightly above our benchmark goal of 266.

C. Key Team Members

Dan Podell (he/him/his), Partner - 13+ years of marketing and web development with local, national and international brands. 4+ years of independent small business owner experience. 5+ years of entrepreneurial and small business experience as one of the flagship members of current place of employment. 10+ years of craft beer industry exposure, on and off-premise networking.

Chad Walhood (he/him/his), Partner - 10+ Years of bar and restaurant experience. 2 years experience in hotel management. 8 years small business owner. 10+ Years broadcast marketing experience. 3 Years Digital Advertising Experience.

Melissa Moss (she/her/hers), Partner - 14 years experience in finance across banking, insurance, and investments. Currently completing her MBA. 5+ years overseeing investment properties.

D. Financing Required

¹https://www.rentcafe.com/average-rent-market-trends/us/wi/madison/

²https://www.realtor.com/realestateandhomes-search/Schenk-Atwood Madison WI/overview

³Emerald City Dominant Tapestry segment

⁴https://cityofmadison.maps.arcgis.com/apps/webappviewer/index.html?id=8c2d43c18d8542c7bdf8a93a11d7e545
5https://cityofmadison.maps.arcgis.com/apps/webappviewer/index.html?id=8c2d43c18d8542c7bdf8a93a11d7e545
based on nearest count station (Winnebago Ave. Eastrail Path at Winnebago St).

⁶<u>https://data.eco-counter.com/ParcPublic/?id=4336#</u> study based on 10% of farthest east pedestrian traffic recorded in public records.