

# DOCKMASTER RESPONSIBILITIES AND PROCEDURES

## (Management Company responsibilities in blue)

### A. REGISTERING NEW VESSELS

- a. Registering boats for GCE slips
  - i. Assign a mutually agreed upon slip to the prospective user.
  - ii. Provide the boat owner with an “Initial General Common Element Rental Agreement” form.
    - 1. The boat owner must complete and sign this registration form and return it with copies of the boat’s registration and insurance.
    - 2. If the boat owner is a tenant, provide him/her with a copy of the “Tenant/Owner Agreement.”
      - a. The boat owner must obtain his/her landlord’s signature and return this form.
  - iii. Compute the pro-rated slip rental for the remainder of the calendar year
    - 1. Send an email to the Management Company (MC) authorizing them to bill the unit owner
    - 2. **MC sends initial bill as directed**
  - iv. Deliver the “welcome to the marina” package of rules and procedures
  - v. Update the various marina documents, which include:
    - 1. The master marina spread sheet
    - 2. The on-line marina slip assignments (Shearwater web site)
    - 3. The email distribution lists for the “marina overall” and for “GCE”
- b. Registering boats for LCE slips
  - i. Provide the slip owner with an “Initial Limited Common Element Registration” form.
    - 1. The slip owner is responsible for providing copies of the boat’s registration and insurance, as well as the name and unit number of the boat owner.
    - 2. No “Tenant/Owner Agreement” is provided.
  - ii. Deliver the a “welcome to the marina” package of rules and procedures
  - iii. Update the relevant marina documents, which include:
    - 1. The master marina spread sheet
    - 2. The email distribution lists for the “marina overall” and for “LCE”
- c. Registering new Kayaks or Dinghies
  - i. Assign a mutually agreed upon space to the prospective user.
  - ii. Provide the boat owner with a “Kayak and/or Dinghy Storage Space Information” registration form.
    - 1. If the boat owner is a tenant, provide him/her with a copy of the “Tenant/Owner Agreement.”
      - a. The boat owner must obtain his/her landlord’s signature and return this form.

- iii. Deliver the “welcome to the marina” package of rules and procedures
  - 1. Upon receipt of the completed registration form:
    - a. Send copy of the registration form to MC
      - i. **MC issues a sticker number**
      - ii. **MC sends sticker to owner, along with “sticker placement instructions”** (provided by the Dockmaster)
      - iii. **MC notifies Dockmaster of sticker number assigned**
      - iv. **MC updates the “Kayak/Dinghy Sticker List”**
    - b. Update the various marina documents, which include:
      - i. The master marina spread sheet
      - ii. The on-line marina slip assignments (Shearwater web site)
      - iii. The email distribution lists for the “marina overall”, “kayaks”, and “dinghies”

## **B. ANNUAL BILLING AND REGISTRATION UPDATE PROCESS**

- a. Check the spread sheet thoroughly for accuracy
- b. Update the spread sheet to the new year’s rates
- c. Send to MC Management for them to use in the preparation of annual marina bills
  - i. Save a copy of this file for future reference
- d. Prepare the “Annual Renewal Registration Forms” to be included in the billing
  - i. Merge information from the “master marina spread sheet” onto annual renewal forms, and sign prior to sending to unit owners
    - 1. GCE Agreement – Annual Extension
    - 2. LCE Registration Form – Annual Extension
    - 3. Kayak/Dinghy Registration Form
- e. Prepare the billing letter format/wording
- f. Prepare the “Instruction Letter” to be provided to billing recipients
  - i. **MC sends to each marina user...**
    - 1. **Instruction Letter**
    - 2. **Completed annual extension forms for the recipient to review and sign**
    - 3. **Billing Letter**
    - 4. **Invoice**
  - ii. **MC receives checks and signed annual extension forms**
    - 1. **Annual extension forms are returned to the Dockmaster**
    - 2. Dockmaster updates the spread sheet per any changes noted on the annual extension form
  - iii. **MC follows up on late payments and submits information to BOD**
  - iv. **MC follows up on forms that are not returned or not signed**

## **C. MARINA DEPARTURES**

- a. Compute any refund due to the departing owner
- b. Send refund authorization to MC
  - i. **MC sends refund checks**

- c. Update the various marina documents, which include:
  - i. Update the master marina spread sheet
  - ii. Send notice to MC regarding discontinued sticker
  - iii. MC updates the kayak/dinghy sticker list**
  - iv. Arrange for the update of the on-line marina slip assignments (Shearwater web site)
  - v. Update the email distribution lists for “marina overall,” “GCE,” “LCE,” “kayaks,” and “dinghies”

#### **D. OTHER ON-GOING DOCKMASTER RESPONSIBILITIES**

- a. Communicate with the users of the marina regarding relevant issues and/or news
  - i. Maintain email distribution lists of:
    - 1. GCE slip users
    - 2. LCE slip owners and/or users
    - 3. Dinghy float users
    - 4. Kayak space users
    - 5. Marina overall
  - ii. Changes to rules
  - iii. Maintenance work
  - iv. Winterization/de-winterization
  - v. Electricity shut-off due to high tides
  - vi. Other marina information as determined to be relevant by the Dockmaster
- b. Manage the “marina” section of the Shearwater web site through the webmaster
  - i. Overview of marina
  - ii. Listing of LCE slips for rent
  - iii. Slip assignment directory
  - iv. Special links for marina users
    - 1. Local weather, tides, DNR regulations, etc.
- c. Prepare rules and regulations updates as needed
  - i. Review with Marina Committee and BOD
  - ii. Submit final version to BOD for approval and distribution as required
  - iii. Send update information to webmaster for updates as required
- d. Prepare annual pricing recommendations
  - i. GCE
  - ii. LCE
  - iii. Kayak
  - iv. Dinghy
- e. Marina maintenance management and improvements to facilities
  - i. Initiate various activities through MC, as needed, including:
    - 1. Repairs – maintenance requests submitted to MC via work order
      - a. As noted by Dockmaster
      - b. As reported to MC by unit owners**
    - 2. Annual maintenance (**MC initiative needed**)
      - a. Winterization/de-winterization

- i. Schedule set by “rules and regulations”
      - b. Power washing/sealing
        - i. Frequency TBD by Dockmaster
    - 3. Improvements as identified/approved by Dockmaster
      - a. Dockmaster prepares an annual marina budget as input to the overall Shearwater budget process
      - b. Dockmaster received BOD approval for expenses as appropriate, and coordinates with MC as needed
      - c. MC arranges for contractor and provides directions**
      - d. Dockmaster provides direction to contractor as requested or agreed upon by MC
    - 4. Continual monitoring of weather that may affect users and communicate this to marina users as appropriate
      - a. Abnormally high tides may necessitate turning off the electricity to the docks (water nearing the height of the walkways/piers (cutoffs at the electrical panels adjacent to the kayak rack and off of the northeast corner of building 16.
        - i. This can also be monitored via the tidal “forecast” link on the marina home page (water levels approaching 4.5 to 5 feet above MLW)
  - ii. Meet with and instruct contractors as needed **(MC assistance appreciated)**
    - 1. Dockmaster writes RFP content as needed for MC to bid
    - 2. MC bids to appropriate contractors**
    - 3. MC manages contractors if possible or agreed upon by Dockmaster**
  - iii. Purchase supplies if needed
    - 1. “West Marine Port Supply” card for discounts
      - a. Submit information to MC for reimbursement
    - b. MC sends reimbursement check**
- f. “Wait List” management
  - i. Categories tracked by date of request
    - 1. Request for an improved/alternate GCE slip assignment
    - 2. Request for a kayak rack space
    - 3. Request for an Improved kayak rack space
      - a. Improved access
    - 4. Request for a dinghy storage space
    - 5. Request for an alternate dinghy storage space
      - a. “A” float vs. “D” float
- g. Guest Space assignments
  - i. Receive request from an owner/resident
  - ii. Assign a slip as appropriate for the vessel, if available
  - iii. Upon departure, send an email to MC with the charge to be billed to the unit owner
  - iv. MC mails bill to unit owner**

- h. Pump-Out Request
  - i. As requested by marina users, escort and instruct them on the pump-out unit. This unit is stored and locked on the northern end of the "T" of dock "B"
  - ii. The cost to utilize this facility is \$10 for each use. After the Dockmaster unlocks the unit, the marina user then either moves the boat to the pump-out dock, or moves the pump-out unit to the boat. The marina user pumps out their boat, and returns the boat and/or pump-out.
  - iii. The Dockmaster(s) then calls the city pump-out boat to pump out the Shearwater equipment.
- i. Coordinate with the Marina Committee
  - i. Recruit members for the committee
  - ii. Ensure that select committee members can fill in during Dockmaster absences
  - iii. Communicate with these members on an ongoing basis as to marina status and/or issues
  - iv. Consult with the committee and/or review significant policy issues and annual pricing recommendations
  - v. Initiate various projects for marina improvements as needed

**E. PREPARE DOCKMASTER REPORTS FOR BOD MEETINGS**

- a. **MC provides monthly information regarding expenses for the Dockmaster**
  - i. **Marina repairs**
  - ii. **Electricity usage**
- b. Dockmaster prepares a report summarizing activities and issues and sends it to MC prior to the meeting for inclusion in the monthly package of BOD materials
  - i. **MC distributes to BOD**
- c. Dockmaster presents the report at the BOD meetings

**F. PREPARE AND SUBMIT ARTICLES FOR THE "SHEARWATER NEWSLETTER"**