



OPERATIONAL PERFORMANCE AUDIT

Frisco Bay Marina

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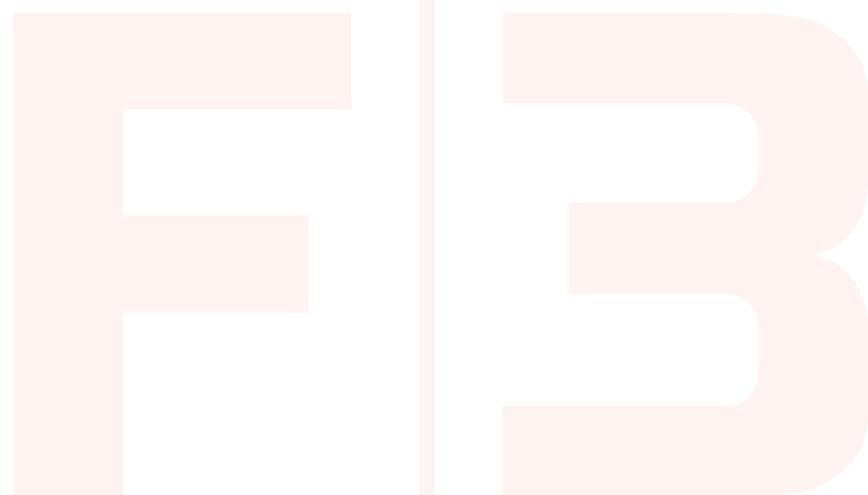
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Contents

1	INTRODUCTION	5
1.1	ACKNOWLEDGEMENTS	5
1.2	PURPOSE OF THIS REPORT	5
1.3	ELICITATION	5
2	EXECUTIVE SUMMARY	7
2.1	OVERVIEW	7
2.2	OPERATIONAL AND TECHNICAL	8
2.2.1	BUILDINGS AND AMENITIES	8
2.2.2	OPERATIONS	9
2.3	SALES AND MARKETING	9
2.4	FINANCE	10
2.5	CONCLUSION	10
3	OPERATIONAL & TECHNICAL	11
3.1	INTRODUCTION	11
3.2	BUILDINGS AND AMENITIES	12
3.2.1	INTRODUCTION	12
3.2.2	LUND HOUSE	12
3.2.3	NEW MARINA OFFICE	12
3.2.4	RESTROOM FACILITIES	13
3.2.5	ISLAND GRILL	14
3.2.6	SERVICE CENTER	15
3.2.7	PADDLE SHACK	16
3.3	OPERATIONS	16
3.3.1	DOCK SYSTEM	16
3.3.2	ACCESS BRIDGE	18
3.3.3	FUEL DOCK	19
3.3.4	MARINA UTILITY SERVICES	20
3.3.5	SIGNAGE	20
3.3.6	FLAGS AND BANNERS	20
3.3.7	WI-FI	20
3.4	SAFETY AND SECURITY	21
3.4.1	SAFETY EQUIPMENT	21
3.4.2	FIRE EQUIPMENT	21
3.4.3	CAR PARKING AND TRAFFIC FLOW	22

4	SALES & MARKETING	22
4.1	INTRODUCTION	22
4.2	BRANDING/ LOGO	22
4.3	SOCIAL MEDIA/ WEBSITE	23
4.4	BOATER COMMUNICATION/ EVENTS	23
5	FINANCE	24
5.1	INTRODUCTION	24
5.2	COMMENTARY ON FINANCE PRACTICES	24
5.2.1	UPKEEP OF RECORDS	24
5.2.2	MARINA RATE STRUCTURE	24
5.2.3	WAIT LIST	24
5.2.4	TECHNICAL SERVICES	24
5.2.5	FUTURE CAPITAL EXPENDITURES	25
5.2.6	RENTALS- MOTORIZED AND PADDLE SPORTS	25
6	PEOPLE MANAGEMENT & DEVELOPMENT	26
6.1.1	INTRODUCTION	26
6.2	ORGANIZATION STRUCTURE AND REPORTING LINES	27
6.3	EMPLOYEE UNIFORMS	28
6.4	EMPLOYEE KNOW-HOW AND TECHNICAL SKILLS	28
6.5	GENERAL PEOPLE MANAGEMENT – SOCIAL EVENTS	28
6.6	KEY LEARNINGS AND RECOMMENDATIONS	28
6.6.1	STAFFING PLANNING	28
6.6.2	TRAINING	29
7	MARINA OPERATIONAL PERFORMANCE AUDIT FORM	29



1 INTRODUCTION

1.1 ACKNOWLEDGEMENTS

F3 Marina and its personnel wish to acknowledge the assistance given, which has made the preparation of this report possible. We wish to thank the Town of Frisco and in particular Mayor Hunter Mortenson, Nancy Kerry, Town Manager and Diane McBride, Recreation and Culture Department Director, for making all the necessary preparations with the many parties concerned to permit this complex and sensitive task to take place and also, for guiding F3 Marina as to the approach to be followed so as to obtain the best results. Further, we would like to show our appreciation to Jeff Goble, Public Works Director, Loli Respini-Pollard, Human Resources Manager and Bonnie Moinet, Finance Director, who gave their full support to F3 Marina's personnel. We would also like to acknowledge Tom Hogeman, General Manager, and the staff of Frisco Bay Marina for their assistance and full cooperation and access for F3 Marina in relation to this task.

1.2 PURPOSE OF THIS REPORT

At the request of the Town of Frisco, CO, the objective of this report is to conduct a Site Audit in accordance with the Scope of Work dated September 21, 2020. The agreed Scope of Work includes three specific tasks, which are outlined below:

- **Task One:** conduct interviews with marina personnel to evaluate A) staff complement and experience B) collective personnel qualities and C) customer relationship skill.
- **Task Two:** review marina operations including A) operations, marina manual and procedures B) financial and administrative practices C) review of the marina operational budgets D) legal and contractual assessment E) sales and marketing program, budgets and targets.
- **Task Three:** assess the marina facility and equipment including A) marina buildings and property upkeep B) technical knowledge, care and maintenance of portable and fixed equipment C) safety awareness and measures.

Following the on-site audit and completion of this report, F3 Marina will attend a presentation meeting to report findings, make recommendations and agree an ongoing program.

This report has been prepared by Alain Giudice, Senior VP of F3 Marina and Phil Cook, Manager of Finance and Operations, and additional team members operating within their respective areas of expertise.

1.3 ELICITATION

From September 21 to October 5, 2020, a site visit to Frisco Bay Marina was carried out by the following F3 Marina team members:

- John Matheson- President of F3 Marina.
- Alain Giudice- Senior Vice President F3 Marina.
- Phil Cook- Manager of Finance and Operations.

During the site visit, F3 Marina staff were cognizant to conduct the process in a sympathetic and collegiate spirit, and took care and attention to acknowledge the significant efforts and achievements of the Frisco Bay Marina team. A relationship-building approach was mutually adopted, allowing for effective discussions and the transfer of

required information.

During the site visit, the following was accomplished:

- An introductory meeting was conducted by John Matheson, Alain Giudice and Phil Cook. The objective of this meeting was to provide an overview of F3 Marina and its business philosophies, operational and management approaches as well as agree a sympathetic approach to the on-site audit.
- Interviews and meetings were conducted with all available staff members, to elicit documentation, information and other feedback necessary to fulfil the requirements of the audit.
- Round tables discussions were conducted by Alain Giudice and Diane McBride with numerous Frisco Bay Marina tenants to introduce F3 Marina and to provide an opportunity for all to receive feedback, suggestions and concerns from the boat owners on various topics and for the Town of Frisco to answer questions regarding the overall master plan development and vision for the future.
- F3 Marina conducted an extensive tour of the marina and its facilities taking account of details relating to their areas of expertise, including marina design, infrastructure, operations, facilities, sales and marketing.
- A tour of the surrounding area was taken, to understand accessibility, amenities, attractions and lifestyle opportunities available to prospective customers and how these may complement Frisco Bay Marina.
- A tour of Dillon Marina was made, to appreciate the distinctive position Frisco Bay Marina holds in the local marketplace and to see how its differentiators may be leveraged to improve the overall operational performance and opportunities for additional revenues generators.
- Photographs and notes were taken and a series of F3 Marina audit forms were completed, to establish records and assist in the compilation of this report.

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2 EXECUTIVE SUMMARY

2.1 OVERVIEW

Those whose vision led to the creation of the Frisco Bay Marina, those who were involved in the marina's construction, and those who have since operated the marina, are justified, in our view, in taking great pride in their achievements. The forthcoming completion of the master plan will further enhance this multi-use marina and park to optimize the use of the site between all the various amenities offered and respond efficiently to the demand of the increasing number of users of all ages.

Due to the immense growth and popularity of Frisco Bay Marina after the improvements of "The Big Dig" dredging project, there are new challenges that have become pressing. The implementation of the 2018 Master Plan is now at the forefront and bathrooms, parking, customer traffic flow and safety of all customers need thoughtful planning and consideration. Further, there is an immediate need to reevaluate the daily operation of the marina including reviewing and developing efficient systems to optimize slip holders, canoe/kayak rack renters, Island Grill customers, Frisco Rowing Center, paddle sports and motorized rentals, launch users, park/beach users' experience at Frisco Bay Marina. To accomplish this, the plan must encompass staff development and training, financial objectives, standard operating procedures and clear, measurable goals that align with the Town of Frisco.

The Frisco Bay Marina is in the unique position of a culmination three entities that are equally important to the Town of Frisco and its tourists. First, the property is represented by a marina complete with docks, mooring field, launch ramp, technical service, boat and trailer storage, motorized boat rentals and transient guests. Second, non-motorized rentals, canoes, kayaks, stand up paddle boards and Hobie Cats have grown into an immense draw for both revenue and visitors to the property. Finally, the park aspect of the property includes the restaurant, beach, trails and playground. Each of these aspects provide the water activation that any municipality desires. Due to the new land created from the Big Dig and the new influx of regular visitors, plans must take into account all three aspects of Frisco Bay Marina and the future growth that needs careful operation and financial planning. One constant must be the customer service that each visitor experiences in the various recreational opportunities as it represents the Town of Frisco as a whole.

F3 Marina appreciates the feedback received from boaters, marina staff, vendors and Town of Frisco administrative staff. While we understand the importance of standardized employee benefits, these items are under consideration and will be made public as soon as finalized.

This report is designed to support the current staff and Town of Frisco on its desire to improve the Frisco Bay Marina into self-sustainable amenity to the citizens of the Town of Frisco and its visitors.

The executive summary will be bullet pointed recommendations followed up by details in body of the report.

2.2 OPERATIONAL AND TECHNICAL

2.2.1 BUILDINGS AND AMENITIES

Our recommendations are:

1. Complete the new Marina Building in the location as previously planned with Stais Architecture & Interiors
 - a. New retail store to provide greater revenue potential to Town of Frisco
 - b. Multiple offices for staff to oversee marina operations
 - c. Access controlled bathrooms for 24/7 access by boaters and staff
 - d. Flexible space to allow for events and as break room for staff
2. Extend or create new building off existing bathrooms
 - a. Increase public bathrooms for paddle sports rental customers and Island Grill customers
 - b. Store additional paddles and lifejackets to support growing rental business
3. Repurpose Lund House
 - a. Split staff between new Marina Building and Lund House
 - i. Marina Building will oversee marina operations and launch operations
 - ii. Lund House staff will focus on paddle sports rentals
 - b. Allow Island Grill to add walk in coolers and dry storage improve business quality and efficiency
4. Expand floating paddle sports docks
 - a. Add additional launch fingers from floating plastic docks to allow more paddle sports rentals to launch per hour
 - b. Extend footprint of dock to allow more storage and launches to grow the business
5. Update grading and drainage of launch ramp
 - a. Complete studies and remedy drainage to allow launch ramp to be accessible without flooding
6. Service yard improvements
 - a. Remove the notch in fence north of the building to allow more yard space
 - b. Improve insulation longevity of current tent or replace with new building
 - c. Clean and organize yard to maximize storage space including removal/ sale of abandoned boats
7. Parking/ traffic flow
 - a. Create additional parking spots as master plan is implemented to accommodate visitors and slip renters

2.2.2 OPERATIONS

Our Recommendations are:

1. Split traffic between marina users (slip holders and motorized boat rentals) and paddle sports/ restaurant / beach goers
 - a. This has been started by putting the marina on the Southeast side of break wall/road and paddle sports off to the West side
 - b. Utilize new building to focus on marina customers and guests that want to purchase items at retail store
 - c. Utilize Lund House to focus on paddle sports rentals and have an auxiliary ship store with minimal items to capture more revenue but keep limited inventory due to the large store in new building
2. Improve efficiency of paddle sports rentals
 - a. Dedicated staff to service these customers at Lund House and paddle shack
 - b. Explore options have additional outdoor kiosks via tablets or rolling stations as were used in 2020
 - c. Obtain approval from Town of Frisco lawyer to have customers watch safety video prior to arriving at the marina to improve flow of customers
3. Train and obtain certification for new motor (Mercury/Yamaha)
 - a. With Evinrude going out of business, staff must be certified to repair new motors as customers come in
4. Staffing improvements
 - a. Maintain customer service levels through continuation of junior staffing program
 - b. Consider identifying an additional full time (year-round) position to oversee marina operations.
 - c. Provide regular training to optimize guest satisfaction and customer service
 - d. Invest in senior leadership training and development to help management of 50+ regular staff
 - e. Reevaluate job descriptions and organizational chart
5. Plan for additional trailer parking
 - a. Secure longer-term lease around B1/ B2 lot
 - b. Secure offsite storage facility

2.3 SALES AND MARKETING

Our recommendations:

1. Branding of marina
 - a. Create/ refresh marina logo to help center the brand as the master plan is implemented
 - b. Utilize Town of Frisco seal on regular documents in addition to brand
2. Update and budget for uniforms that keep all staff representing the marina and Town.
3. Continue to update website to maintain marina occupancy and grow rental business

2.4 FINANCE

Our recommendations:

1. Regularly replace motorized rental boats and paddle sports vessels
 - a. All vessels are paying for themselves within the first year.
 - b. A new fleet maintains higher rental rates and demand
2. Expand rental fleet
 - a. As operations, storage and consumer demands allows continue to grow the fleet to ultimately grow revenues
 - b. Larger fleet would allow the units to last longer
3. Expand services done by technical support staff
 - a. Obtain new certification for engine maker (Mercury/Yamaha)
 - b. Continue to build packages to increase revenues from existing customers
4. Increase revenue from marina slips
 - a. Charge by length of slip or boat length overall whichever is greater
 - b. Consider resident of Town of Frisco vs nonresident pricing
 - c. Charge market rate vs Dillon Yacht Club

2.5 CONCLUSION

The marina's annual visitors create challenges for the daily operations. There are an estimated 70,000 renters that must come through for their video, training, paddles, and life vests. This is a positive challenge to have but still one that must be thought through. Our recommendation is to further split the paddle sports from the marina (rented docks, moorings, transients and motorized rental boats). The new marina office should house the guest services for both the slip holders and the motorized rental boats. The Lund should be optimized to accommodate the paddle sports rentals.

Frisco Bay Marina is a successful property within the Town of Frisco and has continued opportunity to further activate Main Street while allowing its citizens recreational opportunities on the water. By implementing the recommendations, we provided, the Frisco Bay Marina will be positioned for growth now and in the future. Most importantly, the marina will remain self-sustainable and be an amenity for the long term.

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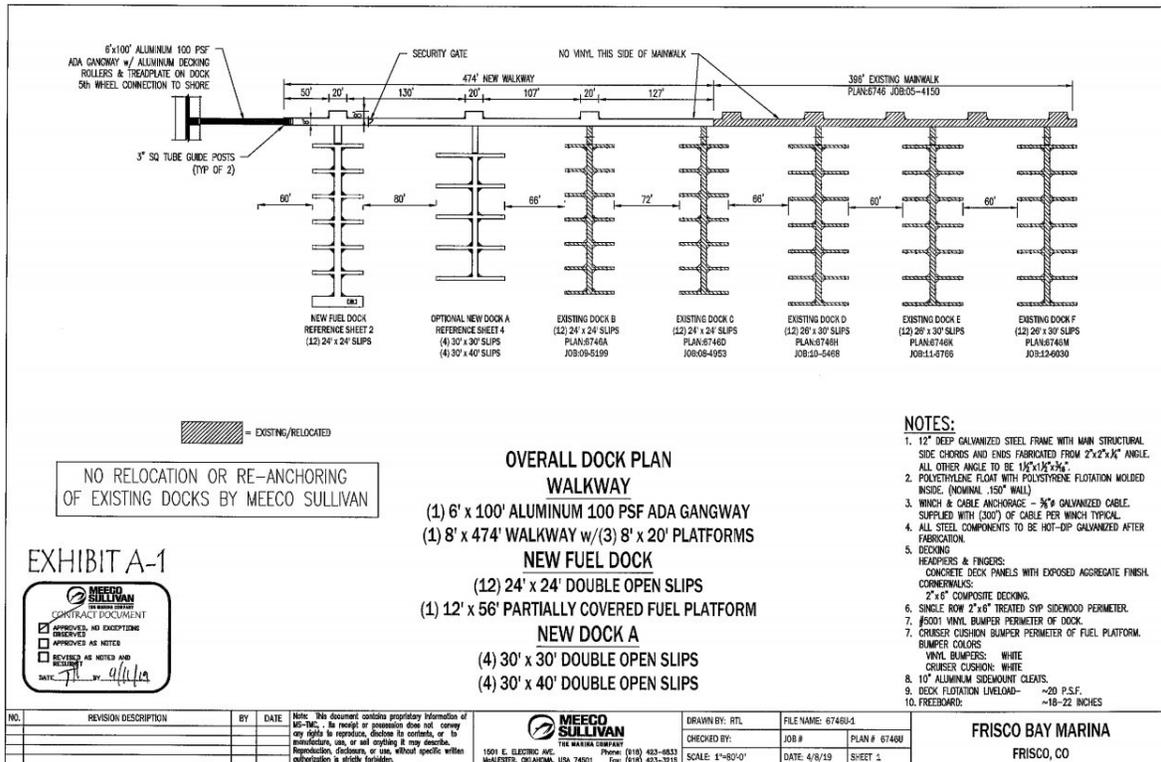
3 OPERATIONAL & TECHNICAL

3.1 INTRODUCTION

Frisco Bay Marina comprises 160 seasonal berths, catering for vessels ranging from 25' to 40' feet. The marina is located in Frisco, Colorado on the shores of Lake Dillon at an elevation of roughly 9,000 feet above sea level. The marina is operated by the town as an enterprise fund. The Town of Frisco marina staff operate the day to day operation including boat rentals, mooring field, boat ramp, non-motorized boat rentals, transient dock space, boat repair service, boat ramp and a beach.

It is readily apparent that a lot of planning has gone into the making of the marina.

The master slip plan for the marina (below) was noticeably dictated by the changing seasonal levels of the reservoir, the repositioning of the docks during the winter season, the new location in relation to the non-motorized watersports, beach and boat ramp. The marina layout also does work well in affording a good range of slip sizes. The slip mix is acceptable and there is room for expansion, especially, by creating more slips to accommodate additional motorized rental boats.



3.2 BUILDINGS AND AMENITIES

3.2.1 INTRODUCTION

Frisco Bay Marina’s facilities are currently allowing a successful business to run, but there are changes that can improve the efficiency of staff, customer traffic flow, and resource allocation. Current operations primarily operate out of the Lund house, which while a central location, creates a bottle neck and is regularly overwhelmed by guests. The bathrooms adjacent to the Lund house and the Island Grill are not sufficient to satisfy the needs of guests. Finally, the service yard tent was designed to be temporary and has exceeded its useful life.

3.2.2 LUND HOUSE



Figure 1 Current Marina Office

The marina office is located in the Lund House, which is the furthest away from the marina main entrance pier. This building is really a location best left for the management of the non- motorized water sports. In its present form this building is too congested to accommodate all the functions of the marina/ship store, motorized and non-motorized activities especially during peak season. Possibility of allowing Island Grill to store dry goods and install walk in coolers to support the restaurant and onsite storage. Additionally, staff lockers could be included in the Lund House.

3.2.3 NEW MARINA OFFICE

The Master Plan has identified a marina office building, that needs to deliver a flexible arrangement to accommodate the day- to-day operation of motorized boat rentals, fuel transactions, retail store and a first-class facility to cater to the marina users (slips, mooring and transient guests). The architectural and build out standards should match those of a first-class facility and provide flexibility to accommodate other functions if needed. The marina office building should be a prominent and focal point, as it is the operational hub, and the center for customer service for the marina and motorized water sports rentals. Ideally in a location that is close to the main dock access point and offering a good view of the marina and the boat ramp.

The F3 Marina team met with the principal architect Mr. Matthew Stais and reviewed the proposed layout and functions of the new marina building. Discussions and suggestions were shared in relation to creating a space that would be multi-functional including dedicated washrooms for boat tenants and staff, a ship store and front desk, offices and a flexible space for use for events, breaks for staff and training.

The marina office should be clearly identifiable and located conveniently with excellent and consistent signage from land and water access.

3.2.4 RESTROOM FACILITIES

Client bathroom and shower facilities are well below the standard one would expect of such a quality marina. There is only one dedicated washroom for berth holders and visitors, and it is located at the furthestmost point from the marina docks' main access. The finishes to these bathroom and shower facilities are surprisingly basic. The facilities should be continually monitored and cleaned regularly to an organized schedule and to a standard determined by the marina management to ensure that each user has the same high-quality experience including: providing good lighting and ventilation, stocked soap and quality hand dryer or disposable towels. Restrooms should be in compliance with national rules and regulations for people with disabilities.

There must be sufficient facilities to cope with the numbers of slip holders and visitors and should be located within 900 feet and easy access of the dock access points. The industry standard recommends one (1) bathroom per 175 marina slips, as a minimum.

It is usual to have a common entrance lobby with individual access doors to signed male, female, unisex and disabled/parent and child facilities. The janitor's closet is also best served from the communal lobby area.

It is our recommendation to consider access control shared bathrooms for the marina users and staff that would be located in the new marina building. Additionally, the existing public restrooms need to be extended to accommodate the non-motorized paddle sports rentals and regular guests of beach and park. The additional public restroom should be adjacent or connected to the existing one located behind the Island Grill.



Figure 2 Current Bathroom Exterior and Interior

3.2.5 ISLAND GRILL

A meeting with the island Grill ownership was arranged during our visit to identify the opportunities to increase the size of the restaurant by extending the size of the kitchen, prep area, walk in coolers, dry storage areas, outside seating and outside bar. F3 Marina agrees that currently due to the limited kitchen space consideration should be provided for additional space. This would provide an opportunity for a refreshed menu, adding additional value to the park and marina visitors. Further dialogue should be investigating to provide a design that would include the proposed Island Grill extension, integration and enhancement of the outdoor seating, open bar terrace and the Lund house.



Figure 3 Island Grill Back Patio

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3.2.6 SERVICE CENTER

The service center building/ tent is past its useful life as it was designed only to be a temporary structure. There have been documented electrical issues. The service business has effectively grown past what the existing infrastructure can support. Future considerations should evaluate if a new permanent building is feasible.

Figure 4 Service Center Office



Figure 6 Current Inside Work Area



Figure 5 Exterior of Work Area

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3.2.7 PADDLE SHACK

Due to the large increase in paddle sports rental volume, it may be feasible to add a rental kiosk with additional paddle and life vest storage to the bathroom expansion mentioned above. The current paddle shack is operable, but creates an additional bottleneck on busy days. Completing this improvement would continue to allow the growth of these revenue centers.

Figure 7 Existing Paddle Shack



3.3 OPERATIONS

3.3.1 DOCK SYSTEM

The dock system is updated and well designed. Possibilities are to add a permanent fueling dock for both customers and rental business, electric and water to the docks.

The docks are built by, the highly regarded, Meeco Sullivan system, a good choice for this location. The construction of the marina included relocation of the existing docks, walkway and fingers and the section was completed by Meeco Sullivan in 2019, the docks are made of galvanized steel frames, polyethylene floats with polystyrene molded flotation inside. The docks and piers are secured by winch-controlled galvanized cable anchorage. Piers and fingers are completed concrete panels with exposed aggregate finish, vinyl rub rail and aluminum side mount cleats.

The mooring hardware is sufficient for the needs of the customers. Regular upkeep and maintenance is vital for longevity as they endure the harsh winters.

Figure 8 Winch and Cable



Figure 9 Dock Example



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3.3.2 ACCESS BRIDGE

The main access bridge is of good integrity and design.

Bridge threshold ramps are of an acceptable incline that function well with the incline of the main body of the main floating pier. The bridge incline is well within the recommended maximum slope of 1:6.

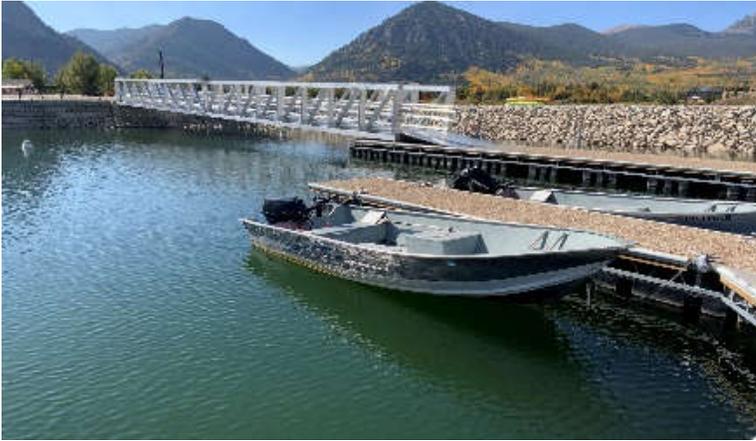


Figure 10 Access Bridge

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F3 MARINA OPERATIONAL PERFORMANCE AUDIT FORM

3.3.3 FUEL DOCK

The current operation of the fuel dock is done by pumping gas into a tank mounted on a truck then transported and transferred into the marina tanks located in a small vessel. The gas is then pumped into the rental pontoon boats, as needed. Although this method was part of the daily operation it leaves a risk for possible liability such as spills, explosion, and certainly not effective in term of staff optimization.

Currently, Frisco Marina is considering to install an above ground double wall tank (4,000 gallons) that will service one (1) gas dispenser located on the end of the floating dock designated for the motorized rental fleet. The proposed fueling facility is satisfactory and provides all the required safety and backup systems. F3 Marina recommends that the current emergency fuel response plan is updated and that a refresher course is mandatory for all the staff.

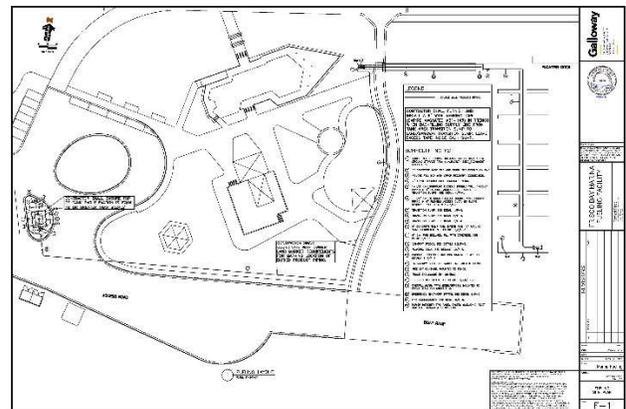
Figure 11 Existing Fuel Dock

Figure 12 Fuel Barge



Figure 13 Existing Fuel Dispenser

Figure 14 Proposed New Fuel Installation



3.3.4 MARINA UTILITY SERVICES

Currently, no electric or water is supplied to the docks. It is our recommendation to supply both amenities to the dock system in the future. For the electrical, we would recommend 1 30 amp, 120v power pedestals for vessels up to 30 feet. For vessels over 30, we recommend 2 30 amp, 120v power pedestals. Water should be sufficient to meet maximum demand at working pressure of 35psi and 10 gallons per minute.

3.3.5 SIGNAGE

Current signage is inconsistent, lacks branding and a distinctive marina identity. Budgets should allocate funds to replace existing signage accordingly.



Figure 15 Signage Examples



3.3.6 FLAGS AND BANNERS

More flagpoles would be desirable, along with banners. It is recommended that a properly coordinated scheme be considered to take account of both advertising and the importance of branding.

3.3.7 WI-FI

When fiber or other cable lines are run to the Frisco Bay Marina property, Wi-Fi should be added to the amenities that guests enjoy.

3.4 SAFETY AND SECURITY

3.4.1 SAFETY EQUIPMENT

Proprietary safety equipment stations are spread around the marina. What is currently in place is adequate, with the exception that more life rings around the perimeter would be advisable.

Ladders are located throughout the dock system and are well within marina safety regulations.

3.4.2 FIRE EQUIPMENT

Many fire codes require docks and piers to include a fire standpipe system. These systems may be wet or dry and are connected to a main water supply or pump truck. Installation should be in accordance with NFPA 14, the standard for the installation of standpipe and hose systems. Generally, it is up to the local fire marshal to approve or disapprove of the fire protection measures planned for the facility.

Figure 16 Standpipe and Main Line



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3.4.3 CAR PARKING AND TRAFFIC FLOW

Access and parking are one of the biggest challenges including the limited number of sidewalks and crosswalks. The current parking and boat storage are 187 spaces. There are several designated car park locations around the marina, nonetheless it would appear that there are insufficient spaces to properly serve all the businesses in its mature state. It should be investigated if more spaces could be made available. According to recognized Marina Codes of Practice, there should be:

1. 0.7 spaces for every wet slip,
2. 0.3-0.6 space to be provided per swing moorings
3. 0.5 space to be provided per employee

Car parking for activities auxiliary to marina activities such as ship chandleries, shops, restaurants, brokerage, should comply with the existing local planning codes or standards of the relevant authorities.

Parking for disabled persons should also comply with the local planning codes and should be located close to the land – based buildings.

When parking and traffic studies are undertaken, the following should be considered:

- a. Existing car parking and traffic generation rates
- b. Size and type of crafts
- c. Number and types of berthing. i.e. wet, Dry storage, Moorings
- d. Patterns over time for peaks and average vehicles and boat usage, including visitors, during:
 1. High season weekends and week days
 2. Location for overflow parking including alternative off- street parking and curb site parking
 3. The impact overflow parking may have in relation to other uses in the locality particularly traffic flows and residential activities.
 4. The possibility and practicality of remote parking (off – site)
 5. Car parking for activities ancillary to marina activities
 6. Common user parking facilities

4 SALES & MARKETING

4.1 INTRODUCTION

Frisco Bay Marina is successful at operating a popular marina destination. There are areas that can further promote the brand to maintain the popularity year after year.

4.2 BRANDING/ LOGO

The logo and branding of the marina should be visible on staff clothing, communication, signage and further augment the reputation of the facility. Frisco Bay Marina should plan to update uniforms to have a consistent appearance for customers. These uniforms should follow brand guidelines for the Town of Frisco and Frisco Bay Marina and prominently showcase the logo.

4.3 SOCIAL MEDIA/ WEBSITE

The current website for the marina is under the Town of Frisco’s domain. This provides a central location for Frisco visitors to find information about the offerings of the marina. Search engine optimization appears to be in line as a “Frisco Bay Marina” Google search provides the marina’s website first.

The marina does not have a social media presence due to the Town of Frisco managing an overarching social media account. It is our recommendation to consider starting social media accounts to help customers of the marina to get timely information.

4.4 BOATER COMMUNICATION/ EVENTS

Boater communication is essential and, when well-structured and organized, can resolve issues prior to escalation. Communication should be improved between the town, community, businesses, marina tenants, and staff at all levels. The primary means of communication would include, email blasts, fliers in bathrooms, text messaging apps and social media postings.

The social / activities on land and water should be an important part of the culture of the marina. In non-Covid-19 years there were marina breakfasts as well as other creative events to show appreciation for customers. The recommended multi-use space in the new marina building would allow these events to have place to host from.



5 FINANCE

5.1 INTRODUCTION

Frisco Bay Marina staff utilizes RecTrac to monitor the rental business, retail store sales, slip rentals and service work order billing. These reports are regularly sent to the finance team at the town hall for entry into Caselle.

5.2 COMMENTARY ON FINANCE PRACTICES

5.2.1 UPKEEP OF RECORDS

All record keeping and reporting was well-organized and easily accessible via the RecTrac software. Marina staff is well trained and experienced on navigating the software. Information needed from Caselle was readily available from the finance team whether a comprehensive annual financial report or monthly reports.

5.2.2 MARINA RATE STRUCTURE

Current charges for slip rentals are based on the registered length of the vessel. Standard marina practice is to bill by the length over all of the vessel or the length of the dock, whichever is greater. This would mean that a 20' vessel that is docked in a 30' slip would pay for the full price of the 30' slip. Likewise, if a 32' vessel was docked in a 30' slip, they would pay for 32' worth of linear footage charges.

An additional option is to charge slips by residency requirements. A Town of Frisco resident could pay less than a non-resident to benefit the taxpayers of the Town of Frisco that have a vested interest in the success of the town.

Mooring fields are also charged by the registered length of the vessel. It may be worth updating to charge by overall length of the vessel to ensure proper swing length between vessels on the mooring field.

Trailer storage and dry storage are currently charged on a linear footage rate. While simple, it does not calculate for wider beamed vessels that would take up more space in the storage lots. Standard marina practice is to charge by the square footage that the vessel or trailer occupies.

Rack storage for canoe/kayaks are charged by the rack except for additional vessels on the same rack.

All of these recommendations would increase the revenue of the marina.

5.2.3 WAIT LIST

Current occupancy for all areas of the marina are at 100%, which provides a stable marina, but also requires a well-organized wait list. Having the wait lists published on the marina website allows for fair tracking of who has first right of refusal for open slips. We have seen marinas charge for access to the wait list to help keep the wait list fresh and legitimate customers. The wait lists can help steer the future growth of the marina. For example, what size slips are in demand, do we need more moorings or should we secure more land for trailers/ winter storage.

5.2.4 TECHNICAL SERVICES

Current service technicians are trained and certified on Evinrude engines, which are now discontinued. We recommend the Town of Frisco invest in these employees to obtain new certification and repair tools to repair and maintain either Mercury or Yamaha engines. A new work order system or process should be investigated to allow the service technicians to focus on their customers and their vessels. As mentioned above, having a new permanent building will assist in long term viability of this amenity. Finally, re-evaluating the current yard, i.e. removing and selling abandoned boats and removing scraps, may allow new revenues to be captured through storage.

5.2.5 FUTURE CAPITAL EXPENDITURES

An emphasis on continually growing the business to be profitable will allow the marina to remain self-sustainable as new capital projects are implemented in accordance with the master plan. By maximizing revenues, this enterprise fund will be able to connect the downtown with the lakefront.

5.2.6 RENTALS- MOTORIZED AND PADDLE SPORTS

The rental fleet for paddle sports, i.e. stand up paddle boards, Hobie Cats, kayaks, canoes, etc., and the motorized rental fleet, i.e. pontoon boats and fishing boats, need to be regularly replaced. The paddle sports are paying for themselves many times over before being sold and replaced. Likewise, the motorized boats have been a very profitable revenue center. Keeping the fleets updated and growing with the demand of the customers keeps the revenue maximized. The motorized rental boat fleet may need to take some transient docks or seasonal docks if the customer demand increases. As the fleet grows, the marina must staff the operation appropriately.



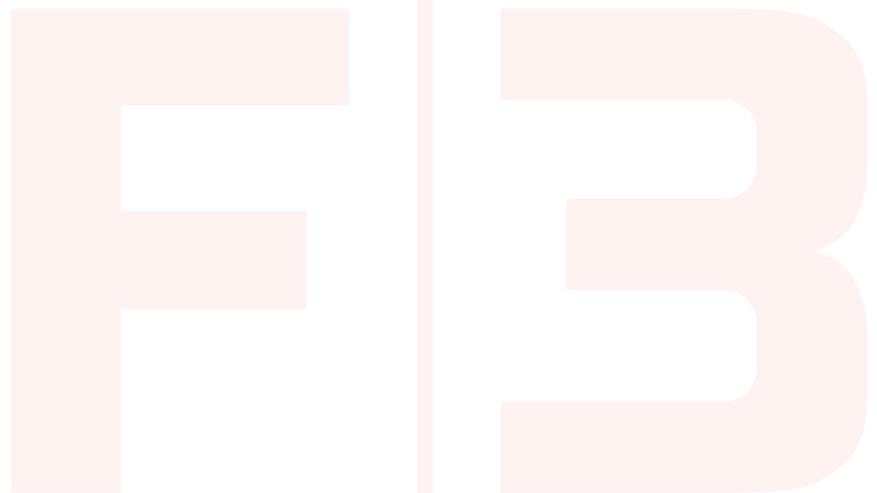
6 PEOPLE MANAGEMENT & DEVELOPMENT

6.1.1 INTRODUCTION

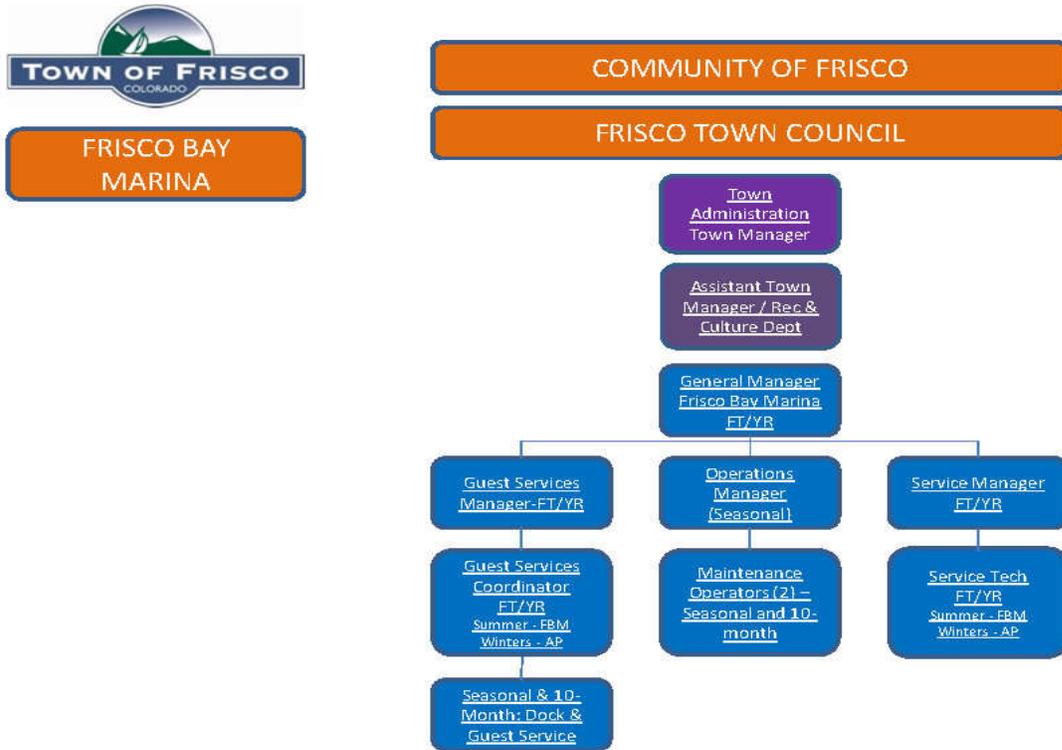
The visit to Frisco Bay Marina consisted of one-to-one meetings with each lead employee, visual observation, and reading through the employee job description and day-to-day duties.

The meeting with the Marina General Manager, Tom Hogeman, gave a general overview of the marina human resources function, comprising recruitment and selection, training and development, performance management and employee relations. This function is supported by the Town of Frisco Human Resources Office. The questions asked and observations made during the meetings at Frisco Bay Marina were all based on F3 Marina standards.

All team members were highly cooperative during the exercise, commented and gave feedback in a constructive manner.



6.2 ORGANIZATION STRUCTURE AND REPORTING LINES



The positions shown in the above organizational chart cover all the required competencies to operate the marina. This has been reflected in the job descriptions presented which also match the primary duties and responsibilities listed as identified whilst analyzing specific jobs.

The current staffing of Frisco Bay Marina is comprised of the following 51 staff:

- General Manager
- Guest Services Manager
- Service Manager
- Operations Manager
- Guest Services Coordinator
- 2 – Guest Service Leads
- 2 - Dock Leads
- 2-Maintenance Operator
- 1 – Service Technician
- 15 – Dock Attendants
- 11 - Guest Service Attendants
- 13 – Junior Dock and Guest Service attendants

6.3 EMPLOYEE UNIFORMS

Our recommendation is to have branded uniforms for the marina to help with customer identification for service. Additionally, it represents the Town of Frisco and the marina identity.

6.4 EMPLOYEE KNOW-HOW AND TECHNICAL SKILLS

All the team members are qualified to perform their respective jobs. During our visit, we found employees to be forward-looking, receptive, positive, accommodating and customer-oriented. They are in possession of good communication skills via phone and face to face interactions.

The majority of staff showed a proactive approach towards problem-solving and have all demonstrated that they are capable of rising to work challenges. This was evident due to the large influx of visitors to the marina during the 2020 season.

6.5 GENERAL PEOPLE MANAGEMENT – SOCIAL EVENTS

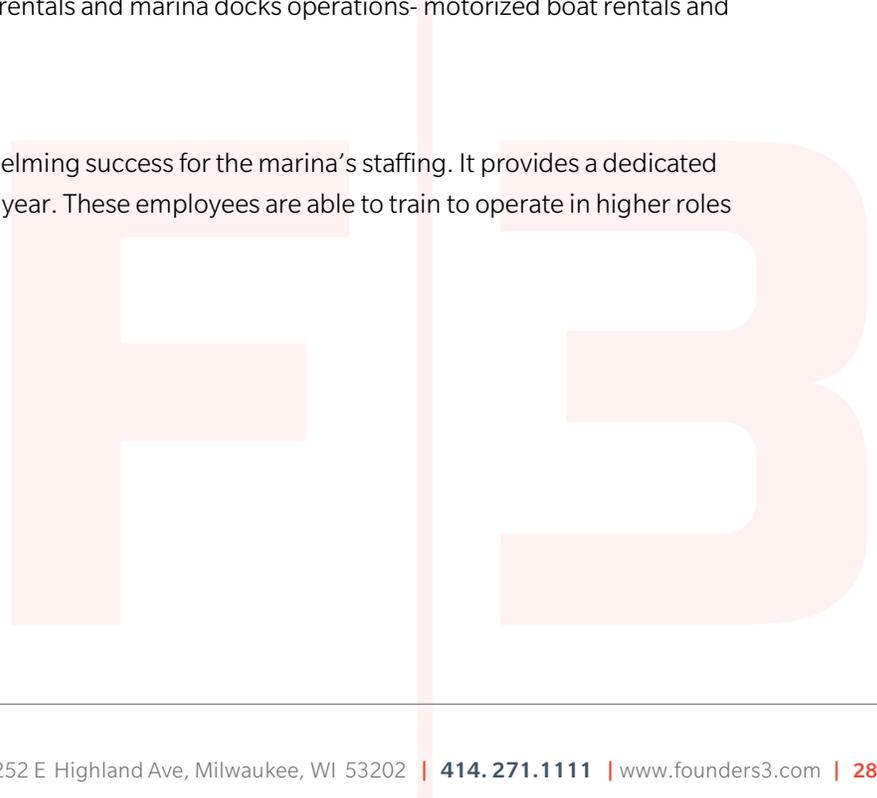
There was feedback during our interviews that discussed and requested additional regular communication and interactions. Normal operating years had planned social events for staff team building, but were limited due to COVID-19.

6.6 KEY LEARNINGS AND RECOMMENDATIONS

Consider updating the organizational chart to optimize the efficiency of the operations and flow of customers through the property. Staffing could operate from two buildings to dedicate service to paddle sports/ non-motorized rentals from the Lund House and marina operations (rented slips, motorized rentals, retail store, fuel sales, event space and dedicated boater/ staff bathrooms) would operate from the new marina building. This would require having at least one more additional fulltime, year-round employee to oversee the two operations that comprise Frisco Bay Marina (paddle sports rentals and marina docks operations- motorized boat rentals and slip rentals).

6.6.1 STAFFING PLANNING

The junior staffing program has been an overwhelming success for the marina's staffing. It provides a dedicated pipeline of talent that regularly return year after year. These employees are able to train to operate in higher roles in their returning years.



6.6.2 TRAINING

The regular training to allow staff to complete their daily tasks are completed. One area that is always worth spending time on is customer service training. This can focus on telephone communication, in person interactions and conflict resolution. Finally, training should also include emergency responsiveness plans.

The team comes across as highly committed and very promising. All team members showed a positive attitude and willingness to learn more. The fact that they have a good level of education demonstrates that they are trainable.

7 MARINA OPERATIONAL PERFORMANCE AUDIT FORM

Marina Name: Frisco Bay Marina

Marina Operational Performance Audit – Staff Appraisal

COLLECTIVE PERSONNEL QUALITIES						
	9-10	7-8	5-6	3-4	1-2	N/A
Personal appearance		8				
Dress code			5			
Conduct & attitude		8				
General competence		8				
Meet job expectations		8				
Relationships & Teamwork		8				
Attend detail (Proactive approach)		7				
Function excellence (Problem solving)		7				
Total Score: 59/80 74%						

F3 MARINA OPERATIONAL PERFORMANCE AUDIT FORM

CUSTOMER RELATIONS SKILLS

	9-10	7-8	5-6	3-4	1-2	N/A
Telephone manner		8				
Face to face interactions		7				
Response to requests		7				
Relaying information		7				
Complaints records and response action			6			
Assistance providing ancillary services		8				
Provision of local information	9					
Concierge skills		8				

Total Score: 60/80 75%

Marina Operational Performance Audit - Operational & Accountancy

OPERATIONAL & ACCOUNTANCY SYSTEMS

	9-10	7-8	5-6	3-4	1-2	N/A
Marina Management System	9					
Marina Management Manual		8				
Accounting System		8				

Total Score: 25/30 83%



F3 MARINA OPERATIONAL PERFORMANCE AUDIT FORM

Marina Operational Performance Audit – Finance & Administrative

FINANCE & ADMINISTRATIVE PRACTICES						
	9-10	7-8	5-6	3-4	1-2	N/A
Upkeep of statutory records	9					
Marina management system & proc.	9					
Review of accounting system & proc.	9					
Check on aged receivables		7				
Preparation & upkeep of Business Plan		7				
Preparation of monthly accounts	9					
General filing & record keeping	9					
Stock control	9					
Personnel management		8				
Resource management		8				
Presentation of offices			6			
Total Score: 90/110 82%						

F3

Marina Operational Performance Audit – Health & Safety

FINANCE & ADMINISTRATIVE PRACTICES						
	9-10	7-8	5-6	3-4	1-2	N/A
Supply of protective clothing			6			
Use of protective clothing			6			
Safe working practices & conduct			6			
Reviews of risk assessment			6			
Adequacy of Emergency Response Plan			6			
Display of H&S information		7				
(COSHH) Storage of hazardous goods			6			
Adequacy of fire & safety equipment		8				
Test & certification of safety equipment		8				
Allocation of muster points		8				
Relations with Emergency Services		8				
Total Score: 75/110 68%						

F3

Marina Operational Performance Audit – Facility Upkeep

MARINA BUILDING & PROPERTY UPKEEP						
	9-10	7-8	5-6	3-4	1-2	N/A
Appearance of front office			5			
Appearance of administration offices			5			
Cleanliness of washrooms				3		
Tidiness of plant rooms & workshops		7				
Tidiness of stores and compounds		7				
Tidiness of other ancillary buildings			6			
General external condition of buildings			5			
Appearance of main entrance way		7				
Cleanliness of footpaths & public space		7				
Cleanliness of roadways		7				
Cleanliness of car parks			6			
Cleanliness of break walls		8				
Appearance of street furniture		7				
Appearance of flags & banners etc.		7				
Adequacy of signs & notices & upkeep				4		
Adequacy & cleanliness of waste receptacles			6			
Cleanliness of drains & culverts			6			
Total Score: 103 /170 61%						

Marina Operational Performance Audit – Technical & Maintenance

FACILITIES - ADEQUACY & CONDITION OF EQUIPMENT						
	9-10	7-8	5-6	3-4	1-2	N/A
Onshore lighting		7				
Illumination of buildings		7				
Mooring bollards		7				
Dredge levels	10					
Floats & piers		8				
Access bridges and ramps	9					
Safety modules	9					
Berth identification		7				
Mooring cleats	9					
Dock fenders		8				
Dock ladders	9					
Navigation buoys	9					
Access controls/barriers/gates/doors		7				
Fuel storage facility				4		
Fuel supply system				3		
Waste oil recovery/storage system				3		
Grey/black water collection system			5			
Fire suppression system		8				
Pollution control equipment			5			

F3 MARINA OPERATIONAL PERFORMANCE AUDIT FORM

Marina water quality	9					
Tools	9					
Stock and spare parts	9					
Workboats		8				
Total Score: 169/230 73%						

Marina Operational Performance Audit – Sales & Marketing

SALES & MARKETING						
	9-10	7-8	5-6	3-4	1-2	N/A
Sales & Marketing program		8				
Sales & Marketing systems		8				
Customer relations database	9					
Branding			6			
News letter		7				
Total Score: 38/50 76%						

