



# **Jupiter Bay Condominium Association**

## **Strategic Plan**

## Building a Better Jupiter Bay

### OUR MISSION:

Maintain and improve Jupiter Bay to the delight of its members while adhering to the Association documents and Florida Condominium Statutes.

### OUR VISION:

An enhanced lifestyle for the members of Jupiter Bay.

### OUR VALUES:

- **Transparency** — sharing information with no secrets
- **Member Involvement** — encouraging member participation
- **Integrity** — adhering to the highest ethical standards
- **Responsiveness** — to the members of the Community
- **Communication** — with all who have a vested interest in the Community
- **Innovation** — by fostering creativity
- **Accountability** — for our actions

## The Board's Vision:

### An enhanced lifestyle for the members of Jupiter Bay

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#### 12 Strategic Goals (by Asset Class) Supporting this Vision

##### Physical Assets:

- A. Clubhouse-type facilities for gatherings, meetings, special-interest clubs & social activities.
- B. Separation of business and recreational from residential areas.
- C. Attractive, well-maintained property with beautiful/consistent landscaping.

##### People Assets:

- D. Additional recreational and social opportunities and special events/trips providing a resort-like experience.
- E. Improved utilization of the skills and talents of the Association's members.
- F. Resolution of issues involving parking, trucks, pets, security and staffing.
- G. Excellent in performing day-to-day Association maintenance and repair activities.

##### Financial Assets:

- H. Compensation/income for extra costs resulting from unit rentals (e.g., lease processing, parking permits, utility usage).
- I. Full funding of reserves, and positive operating fund balances.
- J. Reduction in the cost of various Association and member goods and services.

##### Governing Documents & Communication:

- K. Updated Declaration and Bylaws that accurately reflect the current state of the Community and properly protect its members.
- L. Effective and responsive communication to and from the Jupiter Bay homeowners.

# Jupiter Bay Strategic Plan

11/07/16

Goals / Action Plans	Notes
<p><b><i>Physical Assets – Goal A: Clubhouse-type facilities for gatherings, meetings, special-interest clubs &amp; social activities.</i></b></p>	
<p><b>Short Term</b></p>	
<p>1. Arrange with restaurant manager or Bob Perrin for full Jupiter Bay clubhouse use of the Beach House Restaurant. Consider a Social Director or Social Committee to organize various clubs, get-togethers, dinner-dances, classes and activities -- yoga, cards, bingo, mahjong, etc.</p>	<p>Exploit use of Beach House</p>
<p>2. Prepare contingency plan if restaurant fails:            a) Jupiter Bay takes over restaurant sublease.            b) Determine cost of maintaining restaurant for JB use as a recreational facility, association office and snack/tiki bar -- tax, insurance, maintenance, utilities, equipment, security &amp; supervision.            c) Alternatively, seek an experienced restaurant operator to replace failed restaurant.</p>	<p>Contingency Planning</p>
<p><b>Long Term</b></p>	
<p>3. Assure completion of phase #2 restaurant renovations, including elevator installation, as outlined in the agreement dated April 11, 2015. Once phase #2 restaurant renovations are complete, obtain signoff on the revised restaurant sublease which provides significant benefits and value to Jupiter Bay residents and a 20-year lease extension for Mr. Perrin.</p>	<p>Satisfy Restaurant Agreement</p>
<p>4. Utilize the restaurant's second-floor banquet area for board meetings, owner meetings and social gatherings. Provide movie and PowerPoint slide projection functionality in the restaurant's second-floor banquet area.</p>	<p>Exploit use of Beach House</p>

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Goals / Action Plans	Notes
<b><i>Physical Assets – Goal B: Separation of business and recreational from residential areas.</i></b>	
<b>Short Term</b>	
1. If restaurant continues to be successful, conduct cost/benefit study to build a separate building on vacant land south of East D Building for Office and Maintenance (and possibly recreation). Develop initial plans and specifications for the facility.	New Building Planning
2. Survey owners regarding support for building a separate facility and determine what owners are willing to pay.	Determine Owner Interest
3. If supported by survey, conduct owner vote for construction of separate office and maintenance building.	Owner Vote Material Alteration Vote
<b>Long Term</b>	
4. If successful owner vote to approve, construct Office/Maintenance Building on vacant land south of East D Building. The Building should fit within the design of Jupiter Bay East, and it should have space for a receptionist, office manager, administrative support person, golf cart parking, maintenance equipment/supplies and restroom.	Owner Vote (Costly)
5. Relocate staff, repair and maintenance items, and golf carts to the new facility. Provide sufficient landscaping for the new Office/Maintenance Building to shield it from the other East buildings.	Staff Relocation
6. Once a new Office/Maintenance Building is constructed: <ul style="list-style-type: none"> <li>• Convert the current maintenance building into an exercise facility.</li> <li>• Either reconfigure and sell current office (D-105 East) to help offset cost of building new office or convert it into a meeting and card playing facility.</li> </ul>	Owner Vote (Costly)

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Goals / Action Plans	Notes
<b><i>Physical Assets – Goal C: Attractive, well-maintained property with beautiful/consistent landscaping.</i></b>	
<b>Short Term</b>	
1. Extensively upgrade the up-lighting on palm trees in the waterfall island area, making this area a focal point for West unit residents and lake pathway walkers. Also, redesign and construct modern lighting on bridge.	Improve Landscaping
2. Replace landscape mulch with beach stone throughout the campus.	Improve Landscaping
3. Determine appropriate type and quantity of furniture (chairs, Lounges, tables & umbrellas) for the East & West pools, and develop program to meet requirements both off and in season.	Common Area Furniture
4. Encourage/facilitate JB owners to donate memorial benches. Add benches around the lake and elsewhere to assure one bench per West, Villa and East building.	Common Area Furniture
5. Provide engineering specifications for the consistent installation of new air conditioner lines along the exterior building walls of both the East and West buildings. Assure that all air conditioner vendors adhere to these specifications.	Improve Building Appearance
6. Complete upgrading of the East and West fire protection systems assuring 90+ percent reliability. Keep current with FL statutes and local requirements.	Life Safety (Costly)
7. Consider upgrades to the Association’s irrigation systems to include rain monitoring gauges and improved timing/synchronization with owner activities.	Irrigation Upgrades / Changes

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8. Consider Rules/Regulations change to require covered cars, or cars left on property for long periods, to be parked in Long Term parking lots.	Improve Common Area Appearance
<b>Long Term</b>	
9. Complete restoring/upgrading the West lake sidewalk as needed.	Common Area Restoration (Costly)
10. Investigate reconstructing the pier/dock that was removed years ago due to insurance cost. A replacement dock would have railings to assure safety and prevent insurance increase.	Common Area Restoration (Costly)
11. Install lighted water fountain in lake area near US Hwy #1 to enhance beauty, provide aeration and minimize algae.	Improve Landscaping (Owner Vote)
12. Hire a landscape architect to provide a master design/plan for the campus. The plan should address landscaping adjacent to the units and buildings, assuring consistency.	Improve Landscaping (Costly)
13. Assure sufficient funds (\$70,000 per elevator) for upgrading all four East elevators. The upgrade timing would be based on elevator downtime statistics, repair/maintenance costs and the East A Building elevator upgrade experience. This upgrade could require an East Special Assessment.	Elevator Upgrade (Costly)

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<p><b><i>People Assets – Goal D: Additional recreational and social opportunities and special events/trips providing a resort-like experience.</i></b></p>	
<p><b>Short Term</b></p>	
<p>1. Hire or seek a volunteer “activities/social director” for the Association.</p>	<p>Social Director</p>
<p>2. Formalize the Jupiter Bay Social/Recreational Committee, with the following responsibilities:</p> <ul style="list-style-type: none"> <li>a) Communicate and promote current resident activities – bowling, tennis, golf, water aerobics, and Mah Jongg</li> <li>b) Sponsor additional resident activities including trips.</li> <li>c) Coordinate with Beach House staff regarding restaurant functions, events and opportunities for joint programs.</li> <li>d) Contact nearby resources for use of facilities and planned events (Town of Jupiter, Carlin Park, Harbourside Place, etc.).</li> <li>e) Organize JBCA activities @ Carlin Park to better utilize this facility and expand recreational opportunities—e.g., walking, jogging, tennis, bocce ball, etc.</li> <li>f) Organize JBCA inter-condo association activities to encourage social interaction with our neighbors (Sea Palms &amp; Buena Vista) — e.g., games, cards, bocce ball, golf, etc.</li> <li>g) Organize activities at the East &amp; West pools to better utilize these resources — e.g., swim lessons, laps, races, water polo, aerobics, etc.</li> <li>h) Organize activities on and around the West lake to better utilize this resource — e.g., fishing tournaments, kayaking, RC model events, walking on the path, etc.</li> </ul>	<p>Social Committee</p>
<p>3. Utilize the restaurant more extensively for planned Jupiter Bay social activities.</p>	<p>Utilize Beach House Resources</p>
<p>4. Seek no fee or discount at Tennis Club.</p>	<p>Owner Discount</p>



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Goals / Action Plans	Notes
<b>Long Term</b>	
5. Negotiate with the restaurant to provide event planners, as anticipated by Mr. Perrin, who will work with homeowners to plan and schedule special events – golf, dance, yoga, special interest clubs, classes/education, trips/bus tours, etc.	Utilize Beach House Resources
<b><i>People Assets – Goal E: Improved utilization of the skills and talents of the Association’s members.</i></b>	
<b>Short Term</b>	
1. Encourage volunteerism by Association owners à la co-op community.	Volunteerism
2. Develop questionnaire and solicit owner information to create a database of owner talents, skills and willingness to participate in community activities. Document and utilize these skills for board/officer positions, committees, and social activity coordination.	Skills/talent Inventory
3. Launch a Board Member Training program to educate owners on the functions and responsibilities of board directors, and use this as a recruiting tool.	Board Member Training
4. Develop plan to vitalize and use to full potential the Building Captains. Provide additional structure, focus and visibility (email & direct) to the Building Captain system/role, and assure more equal and balanced input for all building inspection and maintenance issues. Maybe have two Captains per building willing to share responsibility.	Enhance/Clarify Building Captain Role
5. Organize an all-volunteer annual Jupiter Bay Day to complete beautification and clean-up tasks around campus.	Volunteerism

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Goals / Action Plans	Notes
6. Get homeowners with specialized skills (cards, games, tennis, computers, Internet, etc.) to conduct training classes for other owners.	Skills Training
7. Consider additional committees (social, pool furniture, etc.), and encourage participation of other owners on existing committees (budget, rules/regulations, landscaping, fining, and strategic planning). Structure committee formation and commissioning process.	Enhanced Committee Participation
<b><i>People Assets – Goal F: Resolution of issues involving parking, trucks, pets, security and staffing.</i></b>	
<b>Short Term</b>	
1. JBCA Board to meet at least yearly with immediately adjacent condo Boards (Sea Palms & Buena Vista) to share information and look for ways to mutually benefit each other: a) Joint efforts for better buying power, b) Possible joint recreational/exercise facility, c) Share security information and ideas, d) Collaborate on overnight security, and e) Learn and share how problems were effectively addressed.	Coordinate with Neighbor Associations
2. Joint meeting of Social Committee, building captains, Bob Perrin and JBCA Board to discuss and establish parameters and obtain concurrence for outdoor entertainment at Beach House Restaurant. Share with owners the Town ordinance for outdoor entertainment and how Jupiter Bay is assuring we are in compliance. Encourage Beach House management to utilize drop-screening (à la Harbourside place) to reduce entertainment noise.	Manage Outdoor Entertainment Noise
3. Only issue parking tickets on vehicles after 10:00 PM Sunday through Thursday.	Clarify Parking Rules

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Goals / Action Plans	Notes
4. Provide forms on the Association’s website for notifying rental agents of pet and smoking restrictions within owner units.	Interface with Rental Agencies
5. Require all dog owners to register animals. Both owners & renters.	Manage Pets
6. Board and Property Manager to discuss and implement ways to reward/recognize staff as well as provide opportunities for education in new skills. Consider posting maintenance staff pictures on building bulletin boards. Effectively utilize bonus program to motivate and retain staff. Solicit owner input. Benchmark what other associations are paying their employees for similar services.	Develop & Motivate Staff
7. Assure a formalized appraisal system for employees, with documented improvement goals and employee results feedback.	Develop & Motivate Staff
8. Schedule OSHA safety training classes for Association maintenance staff. Develop written safety procedures.	Staff Safety & Development
9. Determine whether we have the right skill set on staff to address our requirements and strategy?	Improve Staffing
10. Consider the replacement of several maintenance staff members with more experienced, higher salaried personnel including those with special skill certifications. Determine whether we should go back to having 4 positions instead of 5. Develop multiple level maintenance staff positions (Associate, Full, Senior) with skill requirements and salary ranges for each level.	Improve Staffing
11. Clarify the “no owner/resident trucks on property rule” and assure rental agent adherence as of an effective date. Strictly enforce the resultant rule. If registered as a truck, it’s a truck.	Clarify Truck Parking Rules
12. Talk to Jupiter Police regarding extra patrols at night.	Improve Security

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<b>Long Term</b>	
13. Explore possible installation of security cameras in most-vulnerable areas of the community. Consider starting with a pilot at the office.	Improve Security
14. Invite rental agents to attend special meetings with board directors to discuss the Association’s rental program, requirements, and rules/restrictions. Discuss truck parking and pet rules. Obtain suggestions on improving Jupiter Bay.	Interface with Rental Agencies
15. Change Condominium Documents to limit type and number of pets. Ask owners if we should limit to 2 pets?	Manage Pets, Owner Vote & Docs Change
<b><i>People Assets – Goal G: Excellent in performing day-to-day Association maintenance and repair activities</i></b>	
<b>Short Term</b>	
1. Continue weekly task review meetings with the property manager, president and any other interested Board member.	Enhance Work Scheduling & Timely Completion
2. Have the Property Manager develop a formal written list of maintenance and office tasks, procedures and schedules for staff to check, follow and sign (as completed) daily.	Enhance Office & Maintenance Procedures
3. Implement a formalized work order processing system which could possibly update status to owners via the Association’s website. Have office respond via email to say when and if work will be completed.	Provide Work Order Feedback to Owners

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4. Have Property Manage inspect all major projects performed by Jupiter Bay’s maintenance staff and sign off on completed work.	Enhance Office & Maintenance Procedures
5. Review the “Association Management” page of the Viewpoint website, and adapt the various sections to the specific requirements of Jupiter Bay.	Enhance Office & Maintenance Procedures
<p><b><i>Financial Assets – Goal H: Compensation/income for extra costs resulting from unit rentals (e.g., lease processing, parking permits, utility usage).</i></b></p>	
<p><b>Short Term</b></p>	
1. Have the Property Manager determine a) average time staff spends on rental administration (leases & parking passes) and b) extra utility (water, sewerage & trash collection) cost. Based on this, the Board will determine an appropriate transfer fee (Statute limit is \$100.00.)	Determine Transfer Fee Rate
2. Less time is being spent by office staff issuing permits with JBRS because of new procedure. Document this procedure and consider extending this to all realtors serving Jupiter Bay.	Improve Tenant Check-in Procedures
3. Consider selling Jupiter Bay branded merchandise such as license plates, shirts, caps, etc.	Obtain Additional Revenue from Renters
<p><b>Long Term</b></p>	
4. Implement transfer fees to recover the cost of processing leases, issuing parking passes and extra utilities. (All but West C who already has transfer fees.)	Implement Transfer Fees, Owner Vote & Doc Change

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Goals / Action Plans	Notes
<b><i>Financial Assets – Goal I: Full funding of reserves, and positive operating fund balances.</i></b>	
<b>Short Term</b>	
1. Budget Committee to develop 2017 budget to account for increasing costs for operations and common and building maintenance that was lacking in years past (2014-2015).	Improve Budgeting
2. Adjust the replacement cost of Jupiter Bay assets annually to account for inflation and other known cost increases to assure a more accurate Reserve Schedule.	Improve Budgeting
3. Provide close monitoring of attorney invoices, post all owner-caused attorney expense to owner accounts, and set not-to-exceed limits on continuing month-to-month litigations.	Reduce Legal Fees
4. Require non-binding owner input before the Board enters into any lawsuits (increase transparency).	Reduce Legal Fees
5. Encourage homeowners to pay their quarterly Maintenance Assessments automatically through BB&T's Association Pay utilizing the new Payments Page of the Association's website. Specifically notify delinquent owners of this option.	Reduce Delinquencies
6. Define cost/benefit and pros/cons of combining the 6 West Associations (A-F). Share this information and encourage and poll all West owners to determine if they want to combine.	Reduce Administration Costs
7. Two weeks prior to the beginning of each quarter, send a maintenance fee reminder to all owners who have provided the Association with their email address.	Increase on-time dues payments

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8. Target total reserve fund balances equal to 1/4 of replacement value (current target is \$1,500,000).	Reduce Need for Special Assessments
9. Train the Property Manager and Treasurer to use the automated annual budgeting program/ spreadsheets. Achieve budget accuracy within 5%. Get Budget Committee member to assist.	Improve Budgeting
<b>Long Term</b>	
10. If owners within the 6 West Associations (A-F) decide to combine into a single association, structure declaration changes.	Reduce Administration Costs (Owner Vote & Doc Change Required)
<b><i>Financial Assets – Goal J: Reduction in the cost of various Association and member goods and services</i></b>	
<b>Short Term</b>	
1. Negotiate with 2 or 3 service vendors in each skill area (electrical, AC, plumbing, carpentry, etc.) to develop a preferred vendor list for regular maintenance and repair services.	Develop/Update Preferred Vendor List
2. Negotiate with service vendors (electrical, AC, plumbing, handyman repairs, etc.) to obtain discounts for JB owners in return for granting multi-unit preferred access.	Obtain JB Owner Discounts
3. Have Social Director or Social Committee negotiate volume contracts with local suppliers, such as workout facilities (e.g., Golds Gym), JB Tennis Club, etc.	Obtain JB Owner Discounts

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4. Replace AT&T wired elevator phones, monitored by Otis, with a cheaper wireless phone system. (Current annual cost for our 10 elevator phones is \$7,783).	Reduce Utility Costs
5. Exercise the buyout option on our Wells Fargo golf cart leases to eliminate continuing monthly bills.	Reduce Equipment Rental Cost
6. Renegotiate our Comcast bulk cable services agreement to obtain better rates while adding Internet coverage and possibly an additional HD cable box per owner.	Reduce Owner Cable Costs
7. Work with our insurance agent (RV Johnson) to replace our costly Citizens wind insurance with a private insurer policy.	Reduce Insurance Cost
<b>Long Term</b>	
8. Investigate if our Association can combine contracts with adjacent Associations to leverage volume pricing with vendors.	Explore Volume Pricing with Neighbor Associations
<b><i>Governing Documents – Goal K: Updated Declaration and Bylaws that accurately reflect the current state of the Community and properly protect its members.</i></b>	
<b>Short Term</b>	
1. Rewrite Paragraph 5 of the Association’s declaration describing the West “recreational facility”, consisting of a Clubhouse (now restaurant), pool and tennis.	Review & update of Association Documents
2. Include the ability to collect attorney “defense of foreclosure” fees into the Association’s bylaws.	Add Defense of Foreclosure Fees to Bylaws



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3. Change paragraph 9.13 of the Association's bylaws to require the annual audited financial report to be furnished to owners within 120 days (not 60 days) following the end of the fiscal year. This would assure consistency with FL Statutes.	Adjust Annual Financial Reporting Requirements
4. Update the Association's bylaws to explicitly allow "consent to action" voting on all association matters except owner voting for board members.	Add Consent to Action to Bylaws
<b>Long Term</b>	
5. Propose for discussion/consideration among the JB membership a realistic and reasonable (2 weeks or 1 month?) minimum rental term.	Add Rental Restrictions (Owner Vote & Doc Change)
6. Propose for discussion/consideration a system to better control the number of pets and enforcement of weight restrictions. Issuance of pet permits might better control dog walking on our campus by off-campus neighbors. Encourage rental agents to enforce per restrictions with penalties.	Improve Pet Control
7. Obtain owner vote to require future amendments to the Association's declaration to be approved by two thirds (FL statute default percentage) of the members instead of the current 75%.	Reduce Declaration Change Approval Requirements
8. Obtain owner vote to require future amendments to the Association's bylaws to be approved by two thirds of the members instead of the current 80%.	Reduce Bylaw Change Approval Requirements
9. Obtain owner vote to require 75% owner approval (FL statute default percentage) for material alterations to the Association property instead of the current 80% requirement.	Reduce Alteration Approval Requirements
10. Communicate to owners that the Board is reviewing for revision/updating our 30-year old declarations and by-laws and ask for their input and recommendations for changes. Appoint a committee of Board Members and homeowners to review these documents and recommend changes.	Review & update of Association Documents

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Goals / Action Plans	Notes
11. Add the ability to collect transfer fees to the Association’s declaration (See Goal “H”).	Add Transfer Fees to Declaration
<b><i>Communication – Goal L: Effective &amp; responsive communication to and from the Jupiter Bay homeowners</i></b>	
<b>Short Term</b>	
1. Review procedure used with the Association website's “contact us” feature to assure effective handling and responding to owner concerns/feedback.	Improve Responsiveness to Owners
2. Always send Association’s Welcome Package/Document to new owners, and follow up after several weeks to assure that it was received and answer any questions. Encourage new owners to use the website for further information. Building Captains need to welcome new owners to Jupiter Bay.	Welcome New Owners
3. Advertise and encourage owners through US mail, email and newsletters to use the Association’s website. Communication would include a description of available information and instructions for using the site. Notify owners of recent changes/additions. Offer basic training on use of Association website hosted by an owner volunteer.	Increase Website Usage
4. Conduct Board Meetings at least once a month in season. Consider publishing a monthly meeting schedule. Provide meeting note sheets at Board Meetings, and use PowerPoint presentations when appropriate facilities are available.	Improve Board Meetings
5. Research creation of an owner forum, classifieds and feedback page(s) on the Association’s website. Allow sharing of Ideas, experience, request advice and recommendations including free stuff and local vendor & service recommendations. All articles will be examined for adherence to website policy and censored as necessary.	Improve Owner Communication

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6. In addition to US mail, email newsletters to owners.	Improve Owner Communication
7. Conduct annual Owner Survey to sense satisfaction and gain specific feedback on what issues are important to them. Possibly combine with annual meeting.	Obtain Owner Feedback
8. Encourage homeowners to submit articles for Newsletters and posting on the Association's website. Try to appoint a homeowner to serve as "Association Reporter" and/or "E-mail Communication Coordinator." Send email that we're looking for a volunteer.	Obtain Owner Communication Input
<b>Long Term</b>	
9. Explore training Association employee to maintain website as an aid to webmaster. Provide contingency for future if current webmaster no longer wants to maintain website.	Provide Website Maintenance Training