

THE SHORES AT BERKSHIRE LAKES

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SOCIAL EVENT GUIDELINES

The Social Committee fosters a strong sense of community by organizing social events, activities, exercise classes, and initiatives for residents of The Shores and Preserve that encourage neighborly interaction and create a positive community atmosphere.

General Guidelines

- All social events and classes must be coordinated by the **Social Committee** and must be **open to all residents**.
- Only bona fide residents (i.e., **Villa, Single Family, or Preserves owner or a registered 6-month tenant**) may serve as hosts for social events. A host is responsible for supervising, coordinating, and budgeting the event.
- Multiple residents may be involved in a single event (see attached Event Proposal and Class Proposal forms).
- A **Social Committee member** will be assigned to each event to act as liaison and provide guidance on all aspects of the event.

Event Approval Process

- The Social Committee will review and discuss all event proposals submitted by bona fide residents and determine whether they will sponsor the event.
- All sponsored events must be submitted to the **Board of Directors** for final review and approval.

Purpose and Restrictions

- All events must be for **social purposes only** and may not be used to honor or celebrate any one individual or group.
- However, the clubhouse may be used for a **memorial service** for a bona fide resident. A request for Memorial Reception Form will need to be submitted to Anchor Associates and reviewed by the Social Committee and approved by the Board.
- The Social Committee will coordinate with the Board on approval for such memorials.

Requirements for Paid Vendors

Any caterers, entertainers, or individuals/companies providing paid services for an event must submit:

- A completed **W-9 tax form**
 - **Proof of Liability Insurance**
 - An **invoice**
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HOST RESPONSIBILITIES

1. Secure a caterer and entertainer (if applicable).
 2. Prepare a budget that includes all event costs—entertainment, decorations, supplies, food, etc.
 3. Submit a flyer for website and bulletin board posting **at least one month in advance**.
 4. Submit **Check Approval Request** forms for vendor payments (if applicable).
 5. Coordinate with the Social Committee liaison to arrange set-up and clean-up times.
 6. Set-up must be requested in advance. Clean-up must be completed **by the end of the day following the event**, unless otherwise approved.
 7. After the event:
 - Return all furniture to its original layout.
 - Remove trash and clean carpets and kitchen areas.
 - Return all borrowed tablecloths and chair covers in clean condition.
 8. **No food** should be left in the kitchen or refrigerator except for coffee and non-perishable items.
 9. Ensure all lights and A/V equipment are turned off after use.
 10. Submit a complete accounting report with **original receipts** within **three days** of the event to the Social Committee for submission to the management company for reimbursement.
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SIGN-UP AND PAYMENT PROCEDURES

- Once the flyer is posted, residents and renters may sign up and submit checks to the **mailbox in the clubhouse lobby**.
 - **Sales are first come, first served**, with Shores residents given priority.
 - Single residents may sign up for themselves and **one guest**.
 - Guests staying with a resident may register at the same time.
 - All checks must be made payable to **The Shores HOA**.
 - **Cash is not accepted** except for events costing \$15 or less (e.g., coffee hour or hot dog parties).
 - For those exceptions, cash must be counted by **two Social Committee members**, and a **Board member** if present, and submitted to the management company.
 - No reservation is guaranteed until payment is received.
 - A date will be established (by the host and Social Committee) after which non-resident guests may submit payment to attend. **On the established non-resident sale date any non-paid resident reservations can then be sold to non-residents.**
 - If sign-ups do not cover the event budget, the event may be canceled and payments returned.
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FINANCIAL GUIDELINES

- All checks to vendors must be processed through the **Social Committee account**.
 - Any **profits** from events will remain in the account and be clearly marked on monthly financial reports.
 - Any **decorations or supplies** purchased with event funds must remain in the clubhouse and be available for future events.
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ALCOHOL POLICY

- **Florida State law prohibits the sale of alcohol** at events.
 - Alcohol **cannot be included** in the admission price.
 - Alcohol **may not be raffled or offered as a prize**.
 - Per Shores insurance, alcohol may not be distributed to guests upon entry to the ballroom.
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EDUCATIONAL & EXERCISE CLASS GUIDELINES

- The Social Committee must **approve and schedule all classes**, including those led by volunteers.
- Bona fide residents may teach classes but cannot be compensated unless they meet the insurance requirements for vendors.

Paid instructors must provide:

- Credentials or certifications
- Proof of liability insurance
- Completed W-9 form

Use of A/V equipment must be **requested and approved in advance**, with instruction/training provided as needed.

CALENDAR

- The Social Committee will prepare a **monthly calendar of events**, which will be posted on the **Shores website** and **clubhouse bulletin boards**.
- The calendar will include reserved times for tennis, pickleball, cards, exercise classes, social events, and special activities.

EVENT PROPOSAL

To host an event for The Shores community, please review the **Social Event Guidelines** and fill out this form completely and set up a date to meet with an officer of The Shores HOA Board for approval.

PROPOSED EVENT: _____

PROPOSED DATE: _____

PROPOSED TIME: _____

HOSTED BY (Please Provide: Name(s), Phone, and E-Mail)

We have read the Social Event Guidelines and will follow the guidelines.

SIGNED: _____

DESCRIPTION OF EVENT: _____

IF APPLICABLE:

PROPOSED CATERER: _____

PROOF OF LIABILITY INSURANCE PROVIDED: (Attach copy): _____

W9 FORM ATTACHED: _____

PROPOSED ENTERTAINMENT: _____

W9 FORM ATTACHED: _____

PROOF OF LIABILITY INSURANCE PROVIDED FROM ENTERTAINER(S) (Attach copy): _____

PROPOSED COST PER PERSON: _____

ESTIMATED COSTS:

FOOD: _____

PLATES, NAPKINS, ETC.: _____

ENTERTAINMENT: _____

DECORATIONS: _____

MISCELLANEOUS: (Describe below): _____

MEETING WITH BOARD OFFICER:

DATE: _____

BOARD OFFICER: _____

DECISION: _____

BOARD OFFICERS' SIGNATURES: _____

IF DISAPPROVED, REASON: _____
