

SOCIAL EVENT & ACTIVITY GUIDELINES

THE SHORES AT BERKSHIRE LAKES MHOA 7845 Berkshire Pines Drive, Naples, Florida 34104

The Shores committees strengthen our community by organizing social events, activities, educational programs, and exercise classes for residents of The Shores and The Preserve. These programs encourage neighborly interaction and create a welcoming community atmosphere.

COMMITTEE STRUCTURE

The Social Committee is divided into two separate committees:

- **Social Party Committee:** Responsible for resident social events and parties. Questions about hosting an event or party should be emailed to socialcommittee@shoreshoa.com.
- **Activities Committee:** Responsible for community activities, including educational programs, exercise classes, and other regularly scheduled activities. Questions about activities should be emailed to activities@shoreshoa.com.

APPLICATION FORMS

Use the appropriate attached form when proposing an event or activity:

Resident Event Proposal Application

OPEN TO ALL RESIDENTS OF THE SHORES AND PRESERVE

Residents of The Shores and The Preserve, including residents who serve on a committee, may use this application to propose a social event or party. Submit the completed application to MAY Management at spalmer@mavmgt.com and the Social Party Committee at socialcommittee@shoreshoa.com.

Activities Committee Proposal Form

Use this form to propose an educational program, exercise class, or other community activity, whether led by a volunteer or a paid instructor. Submit the completed form to MAY Management at spalmer@mavmgt.com and the Activities Committee at activities@shoreshoa.com.

GENERAL GUIDELINES

- All social events, activities, and classes must be coordinated by the appropriate committee and **open to all residents of The Shores and The Preserve**.
- Only verified residents—Single-Family, Villa, or Preserve owners, or registered six-month tenants—may serve as hosts for social events. The host is responsible for supervising, coordinating, and budgeting the event.
- Multiple residents may host or assist with a single event. List the hosts and their contact information on the **Resident Event Proposal Application**.
- A member of the appropriate committee will be assigned to each event or activity to serve as a liaison and provide guidance.

EVENT APPROVAL PROCESS

- Residents proposing a social event or party must submit a completed **Resident Event Proposal Application**.
- The Social Party Committee will review each proposal and determine whether to sponsor the event.
- All resident-proposed events sponsored by the Social Party Committee must be submitted to the Board of Directors for final review and approval.
- Before the October Board meeting, the Social Party Committee will submit a proposed list of social events for the upcoming season to the Board. Individual **Resident Event Proposal Applications** are not required for this committee-submitted seasonal list.

PURPOSE AND RESTRICTIONS

- All social events must be for social purposes only and may not be used to honor or celebrate any one individual or group, except as provided below for memorial receptions.
- The clubhouse may be used for a memorial reception for a verified resident. A completed **Memorial Reception Form** must be submitted to management, reviewed by the appropriate committee, and approved by the Board of Directors. This separate form must be used for memorial receptions.

REQUIREMENTS FOR PAID VENDORS

Any caterer, entertainer, individual, or company providing paid services for an event must submit:

- A completed W-9 tax form.
- Proof of liability insurance.
- An invoice.

HOST RESPONSIBILITIES

1. Secure a caterer and entertainer, if applicable.
2. Prepare a budget that includes all event costs, such as entertainment, decorations, supplies, and food.
3. Submit a flyer for posting on the website and clubhouse bulletin boards at least one month before the event.
4. Submit Check Approval Request forms for vendor payments, if applicable.
5. Coordinate with the Social Party Committee liaison to arrange setup and cleanup times.
6. Request setup in advance. Complete cleanup 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; clean the carpets and kitchen areas; and return all borrowed tablecloths and chair covers in clean condition.
8. Do not leave food in the kitchen or refrigerator, except for coffee and nonperishable items.
9. Ensure that all lights and audiovisual equipment are turned off after use.
10. Submit a complete accounting report, including original receipts, to the Social Party Committee within three days after the event. The committee will forward the report to the management company for reimbursement.

SIGN-UP AND PAYMENT PROCEDURES

- Once the flyer is posted, residents and renters may sign up and place their checks in the mailbox in the clubhouse lobby.
- Registration is on a first-come, first-served basis, with residents of The Shores and The Preserve given priority.
- Single residents may sign up for themselves and one guest.
- Guests staying with a resident may register at the same time as the resident.
- All checks must be made payable to **The Shores HOA**.

- Cash is not accepted except for events costing \$15 or less, such as coffee hours or hot dog parties. For these events, two committee members must count the cash, with a Board member participating if present. The funds must then be submitted to the management company.
- No reservation is guaranteed until payment is received.
- The host and Social Party Committee will establish a date when nonresident guests may submit payment to attend. Beginning on that date, spaces held under unpaid resident reservations may be offered to nonresidents.
- If registrations do not cover the event budget, the event may be canceled and payments returned.

FINANCIAL GUIDELINES

- All checks issued to vendors must be processed through the Social Committee account.
- Any profits from events will remain in that account and be clearly identified in the monthly financial reports.
- Decorations and supplies purchased with event funds must remain in the clubhouse and be available for future events.

ALCOHOL POLICY

- Alcohol may not be sold at events.
- Alcohol may not be included in the admission price.
- Alcohol may not be raffled or offered as a prize.
- Under the Shores' insurance requirements, alcohol may not be distributed to guests upon entry to the ballroom.

EDUCATIONAL & EXERCISE CLASS GUIDELINES

- Anyone proposing an educational program, exercise class, or other community activity must submit the **Activities Committee Proposal Form**.
- The Activities Committee must review, approve, and schedule all classes and activities, including those led by volunteers, in coordination with the Board's community calendar.
- The proposal form must identify the organizer or instructor, proposed schedule and location, participant fees, instructor compensation, and equipment needs.
- Verified residents may teach classes but may not receive compensation unless they meet the vendor insurance requirements.

Paid instructors must provide:

- Credentials or certifications.
- Proof of liability insurance.
- A completed W-9 tax form.

Use of audiovisual equipment must be requested and approved in advance. Instruction or training will be provided as needed.

CALENDAR

- The Board of Directors is responsible for preparing, approving, and distributing the monthly community calendar in coordination with the Social Party Committee and the Activities Committee.

- Both committees will provide scheduling information to the Board and coordinate with the Board to resolve scheduling conflicts.
- Approved event and activity details from the **Resident Event Proposal Application** and the **Activities Committee Proposal Form** will be provided to the Board for inclusion in the calendar.
- The calendar will include reserved times for tennis, pickleball, card games, exercise classes, social events, and special activities.
- The approved calendar will be posted on the Shores website and clubhouse bulletin boards.

ATTACHMENTS

1. **Resident Event Proposal Application**
OPEN TO ALL RESIDENTS OF THE SHORES AND PRESERVE
2. **Activities Committee Proposal Form**

THE SHORES AT BERKSHIRE LAKES MHOA
7845 Berkshire Pines Drive, Naples, Florida 34104

Resident Event Proposal Application

OPEN TO ALL RESIDENTS OF THE SHORES AND PRESERVE

For residents who are not Social Party Committee members

Submit to MAY Management at spalmer@maymgt.com and the Social Party Committee at socialcommittee@shoreshoa.com.

Use this application to propose a resident social event or party. The Social Party Committee will review the proposal and determine whether to sponsor it. Sponsored proposals must receive final approval from the Board of Directors. All events must be open to residents.

Applicant and event hosts

Applicant name and community address

Phone: _____ Email: _____

Residency: ☐ Single Family owner ☐ Villa owner ☐ Preserve owner

☐ Registered six month tenant ☐ I am not a Social Party Committee member

Additional host names and contact information

Proposed event

Event name

Description and purpose

Proposed date: _____ Alternate date: _____

Event time: _____ to _____

Requested location: _____

Setup date and time: _____

Cleanup date and time: _____

Expected attendance: _____ Maximum attendance requested: _____

Registration and publicity

Proposed cost per person: \$ _____ Proposed registration deadline: _____

Registration contact or method: _____

Proposed nonresident guest sale date for committee review: _____

Flyer: ☐ Attached ☐ Will be submitted at least one month before the event

No reservation is guaranteed until payment is received. Make checks payable to The Shores HOA. Follow the payment and guest registration procedures in the guidelines.

Event Budget and Review

Event name: _____

Vendors and documentation

Proposed caterer: _____

Phone or email: _____

Attached: ☐ W-9 tax form ☐ Liability insurance ☐ Invoice ☐ Not applicable

Proposed entertainer: _____

Phone or email: _____

Attached: ☐ W-9 tax form ☐ Liability insurance ☐ Invoice ☐ Not applicable

Other paid vendors: _____

All paid vendors must provide a completed W-9 tax form, proof of liability insurance, and an invoice. Attach documentation for each additional paid vendor.

Estimated budget

Food: \$_____ Entertainment: \$_____

Decorations: \$_____ Plates napkins and supplies: \$_____

Other costs: \$_____ Describe: _____

Total estimated costs: \$_____ Expected paid attendance: _____

Estimated event revenue: \$_____ Estimated surplus or shortfall: \$_____

Room and equipment requirements

☐ Tables ☐ Chairs ☐ Microphone ☐ Sound system ☐ Screen or projector

Room arrangement and other equipment needs

Host acknowledgment

I confirm that I am a verified resident eligible to host an event and am not a Social Party Committee member. I have read and agree to follow the Social Event and Activity Guidelines, including vendor documentation, payment procedures, alcohol restrictions, setup and cleanup requirements, and submission of an accounting report with original receipts within three days after the event. I understand that committee sponsorship and final Board approval are required.

Printed name: _____

Host signature: _____ Date: _____

Additional host signature: _____ Date: _____

Committee and Board use only

Social Party Committee: ☐ Sponsored ☐ Sponsored with conditions ☐ Not sponsored

Reviewer: _____ Review date: _____

Assigned committee liaison: _____

Board decision: ☐ Approved ☐ Approved with conditions ☐ Not approved

Board meeting date: _____ Recorded by: _____

Conditions or reason: _____

Calendar coordination: ☐ Submitted to Board ☐ Added to Board approved calendar

THE SHORES AT BERKSHIRE LAKES MHOA

7845 Berkshire Pines Drive, Naples, Florida 34104

Activities Committee Proposal Form

Submit to MAY Management at spalmer@maymgt.com and the Activities Committee at activities@shoreshoa.com.

Use this form to propose an educational program, exercise class, or other community activity. All activities must be open to residents and approved and scheduled by the Activities Committee. The Board prepares the community calendar in coordination with the Social Party and Activities Committees.

Proposed activity

Activity or class name

Type: ☐ Educational program ☐ Exercise class ☐ Other: _____

Description and purpose

Organizer and instructor

Organizer name and community address

Phone: _____ Email: _____

Instructor name and company if applicable

Phone: _____ Email: _____

Instructor status: ☐ Resident volunteer ☐ Paid resident ☐ Paid outside instructor

Schedule and attendance

Proposed start date: _____ End date if applicable: _____

Frequency: ☐ One time ☐ Weekly ☐ Monthly ☐ Other: _____

Preferred day(s): _____ Time: _____ to _____

Requested location: _____

Setup time needed: _____ Cleanup time needed: _____

Expected attendance: _____ Maximum capacity requested: _____

Registration required: ☐ Yes ☐ No Registration deadline: _____

Registration contact or method: _____

Activity Requirements and Review

Activity or class name: _____

Costs and payment

Participant fee: ☐ No fee ☐ \$_____ per person per _____

Instructor compensation requested: ☐ None ☐ \$_____ per _____

Estimated supplies or other costs: \$_____ Total estimated cost: \$_____

Describe costs and proposed payment arrangements

Paid instructor documentation

Paid instructors must provide credentials or certifications, proof of liability insurance, and a completed W-9 tax form. Verified resident instructors may receive compensation only if they meet the vendor insurance requirements.

Attached: ☐ Credentials or certifications ☐ Liability insurance ☐ W-9 tax form

☐ Not applicable because the instructor is an unpaid volunteer

Equipment and room requirements

☐ Tables ☐ Chairs ☐ Microphone ☐ Sound system ☐ Screen or projector

Other equipment room arrangement or participant supplies

Audiovisual equipment requested: ☐ Yes ☐ No Training needed: ☐ Yes ☐ No

Audiovisual equipment use requires advance approval. Instruction will be provided as needed.

Organizer acknowledgment

I have read the Social Event and Activity Guidelines and agree to follow them. I will coordinate scheduling with the Activities Committee, complete setup and cleanup, return furniture to its original arrangement, and turn off lights and audiovisual equipment after use.

Printed name: _____

Signature: _____ Date: _____

Committee and Board use only

Activities Committee: ☐ Approved ☐ Approved with conditions ☐ Not approved

Reviewer: _____ Review date: _____

Assigned liaison: _____

Approved schedule and location: _____

Conditions or reason for nonapproval: _____

Board review if applicable: ☐ Approved ☐ Approved with conditions ☐ Not approved

Board review date: _____ Recorded by: _____

Calendar coordination: ☐ Submitted to Board ☐ Added to Board approved calendar