

# RPAC Major Investor Grant Application for State and Local Associations Application

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**Submitted By:** jhebb@sumnerrealtors.com

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**Association:** SUMNER ASSOCIATION OF REALTORS® INC

**Association ID:** 7800

**Address 1:** 35 Executive Park Drive

**Address 2:** Unit B

**City:** Hendersonville

**State:** TN

**Zip:** 37075

**Association Executive First Name (if different from above):** Jeff

**Association Executive Last Name (if different from above):** Hebb

**Association Executive Contact Email (if different from above):**

## RPAC Chair:

**RPAC Chair First Name:** Jason

**RPAC Chair Last Name:** Lee

**RPAC Chair Email Address:** jjlee2415@gmail.com

**RPAC Chair Company::** simpliHOM

**RPAC Chair Address 1:** 118 Saundersville Rd

**RPAC Chair Address 2:**

**City:** Hendersonville

**State:** TN

**Zip:** 37075

## Major Investor Event Information

**Total Amount to Raise at Event:** \$10,000

**Major Investor Event Goal:\* :** 20

**Proposed Date::** 2024-04-09

**Alternate Date 1:** 2024-04-09

**Alternate Date 2:**

**Approximate Start and End Time For Event::** 5:00PM-7:00PM

**Event Location:** Emerald Union, 112 Public Square, Gallatin, TN 37066

## Section 1: RPAC History and Goals

**1a. 2024 State Major Investor Goal :** 28

**1b. What is your 2024 RPAC budget for direct fundraising expenses?:** \$8,000

**2024: # of Major Investors:** 0

**2023: # of Investors:** 544

**2024: # of Members:** 881

**2023: # of Members:** 856

2024 Soft Receipts: 23

2023 Soft Receipts: 2,318

2024 Hard Receipts: 5,656

2023 Hard Receipts: 4,185

**Please explain your ongoing RPAC Major Investor & President's Circle fundraising activities, RPAC education and recent RPAC related events.:** We are developing an annualized plan with four key events (RPAC Dessert Auction, Major Investor event, Bowling Extravaganza - Participation, RPAC-A-Thon - Participation and upgrades). We are introducing new levels for RPAC investments and are working towards implementing NAR's Best Practices for Choosing REALTOR Champions. We are adding an NAR State role education component and ask at our local Broker Forum for RPAC.

## Section 2: Major Investor Fundraising Initiative Details

**Goal to Raise:** \$10,000

**Attendees Goal:\*** 30

**# of Major Investors to enroll:\*** 20

**2b. Please explain, in detail, the type of event you are planning. Include event plan, time and location, guest target market, and any additional comments you would like RPAC Leadership to review.\*:** We are expanding our RPAC MI event program this year to include a meet-greet reception with elected officials at the beginning of the evening, then move into a members only dinner program. We have requested Marion Wadsworth from the NAR travel team to be here, educate, and make the ask. We look forward to her being here and appreciate the opportunity for her to be here. The event is being held at Emerald Union in Gallatin, TN, Tuesday, April 9, from 5:00PM-7:00PM. Our target market is to: one - retain 2023 Major Investors, two - add 6 new (30%) Major Investors, and three - seek members to upgrade either their Major Investor level and/or add President's Circle. We are emphasizing "brining a friend" to gain more investors. For additional comments, for going on 11 years now, in the associations I have been with I have sought the partnership and seen how NAR's partnership has benefited us tremendously. The teamwork is valuable! Thank you, for the years and years of support as we strive to provide the best results for that support and to #DoGoodThings

**2c. Please list the Association Members who have agreed to serve on the Host Committee, or who you are targeting to serve on the Host Committee. (Best Practice: Host Committee Members should be Major Investors or pledge to step-up by the event.)\* :** With a small staff, I am CEO and Governmental Affairs Director roles in helping our REALTOR Party efforts grow and in helping plan this event. The RPAC Chair is Jason Lee, Co-Chair is Jen Overstreet. They are helping, along with the RPAC committee to plan and implement a great event. Ideally, we will continue to grow our REALTOR Party program to include REALTOR Party Leadership roles and Best Practices for Choosing REALTOR Champions. We are also adding emphasis on 'bringing a friend' to the event to gain more investors.

**2d. Have you contacted your State's Major Investor Council (MIC) Representative? If you don't know who your state's representative is, please [click here](#) and reach out to them ASAP.:** Yes

**2e. Please itemize anticipated expenses for the entire fundraiser. Be advised that customized printed materials and Non-Member Speakers are not eligible for reimbursement through the program.:** Venue rental \$2,000, Catering and rentals \$3,600, Service help \$450, beverages and supplies \$750, decorations \$600

**2f. Have you held this type of an event in previous years?:** Yes

## 2023 Event Details

## 2022 Event Details

## Section 3: Major Investor Event Grant History

**3a. Please describe any previous year's Major Investor Event detailed above.\* :** 2022 and 2023 Major Investor events were very different. 2022 was a Top Golf experience with the usage of a Top Golf membership for a year. It was nearly twice as expensive (before my time here)

as the MI event last year. 2023 was held in an airport hanger, with nice cars, plane, photo booth, musical guests, and valuable education from Colin Mullane as the NAR speaker.

**3b. Please explain any best practices used in the past events. How do you plan on improving this year?:** From my experience, nearly 11 years in the industry, the best and most productive RPAC Major Investor event has been a combination event. The first portion of the evening is a meet-greet with elected officials and members. Those officials then leave and the event moves into a dinner program with the NAR speaker concluding with the ask. This year, that is the format we are offering and are excited that Marion Wadsworth (NAR team) will join us along with the TN REALTORS state role NAR MI Council Member Carmen Prince. in addition, we are add emphasis on "bringing a friend" to increase the amount of investors.

## Section 4: Event Requests

**4a: What is the closest airport to your event?:** Nashville - BNA

**4b: Will the speaker need to rent a vehicle to travel to the event?:** No

**4c: What is the best/closest hotel to your event?:** The hotel that is within 20 minutes of the venue but closer towards the airport and has a lot of walkable amenities is the Fairfield Inn & Suites - <https://maps.app.goo.gl/aqd3NNx4xpRz2agM9>

**4d: Is there a specific theme/attire for your event?:** The venue is rustic, you could see Nashville sheek to cocktail/business casual

**4e. A Representative is required as part of your reimbursement, do you have a speaker already secured? :** Yes

**If Yes: Please state Who and their Position:** : Marion Wadsworth - RPAC Trustees Fundraising Committee Chair (see is requested, has confirmed to me, awaiting final from NAR)

**If No: Would you like to request an NAR national speaker?:** No

**If Yes: Do you have a speaker preference? :**

**4f. Please list any additional notes for the approval committee's reference, here::** We are so thankful for the opportunity of grants from NAR. They help us supplement our budget, help us better plan for, and implement valuable events. The partnership with NAR is appreciated! I promote to our Association NAR's value whenever possible. Thank you at NAR for your teamwork. Thank you NAR committee for your support and teamwork. We look forward to a successful RPAC Major Investor fundraising event.

## Section 5: Acknowledgement & Signature

**I have read and reviewed the Major Investor Event Guidelines. I pledge to send 30% of everything raised at this event to NAR. My signature below serves as acknowledgement of these policies, and an understanding of the program's expectations\*:** Yes

**I understand that in order to get reimbursed the event must commit to raise, on average, \$500.00 per attendee of NEW money! New money is defined as investors that have not been Major Investors before and invest at one of the Major Investor levels (Sterling R, Crystal R, Golden R, Platinum R), or investors that step up to higher levels of major investment (e.g. Sterling R steps up to Crystal R or Golden R etc., or a Major Investor becomes a President's Circle member)\*:** Yes

**I understand that the purpose of the Major Investor event is to increase the number of Major Investors! This is NOT an appreciation event. Appreciation events are the responsibility of the State and Local associations. :** Yes

**I understand that a component of the Major Investor event MUST be devoted to President's Circle in order to get reimbursed. A portion of the agenda must be devoted to President's Circle, and incorporate the President's Circle Overview Document.:** Yes

**I understand that there is an enrollment dialog and a checklist established for a reason and I agree to distribute both to my Host Committee and make sure that the enrollment dialog and checklist are utilized. If I am asking current investors to "bring a friend" to our event, I will make sure that we distribute the enrollment dialog to our current investors so invitees are aware of the purpose of our event.:** Yes

**State and local REALTOR® associations shall only use resources provided by the NAR REALTOR® Party Program within their association's territorial jurisdictions as set by NAR.**

**Does the proposed activity adhere to the stated requirement?:** Yes

***I understand that any deviation from the above requirements must have prior written approval by NAR or the cost of the event may not be reimbursed.***