

GENERAL ASSEMBLY OF NORTH CAROLINA  
SESSION 2007

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SENATE DRS35465-MC-202 (3/4)

Short Title: Certified Retirement Community Program. (Public)

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Sponsors: Senator Weinstein.

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Referred to:

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A BILL TO BE ENTITLED

AN ACT TO CREATE THE NORTH CAROLINA RETIREMENT COMMUNITY PROGRAM.

The General Assembly of North Carolina enacts:

**SECTION 1.** Chapter 143B of the General Statutes of North Carolina is amended by adding a new Part to read:

"Part 2K. North Carolina Certified Retirement Community Program.

**"§ 143B-437.100. North Carolina Certified Retirement Community Program – creation; powers and duties.**

(a) Program. – There is established the North Carolina Certified Retirement Community Program as part of the 21st Century Communities program of the North Carolina Department of Commerce. The Department shall coordinate the development and planning of the North Carolina Certified Retirement Community Program with other State and local groups interested in participating in and promoting the North Carolina Certified Retirement Community Program. The 21st Century Communities program shall promulgate administrative regulations to implement the provisions of this Part. For purposes of this Part, "Department" means the North Carolina Department of Commerce, and "Program" means the North Carolina Certified Retirement Community Program.

(b) Purpose. – The purpose of the Program is to encourage retirees and those planning to retire to make their homes in North Carolina. In order to further this purpose, the Department shall engage in the following activities:

(1) Promote the State as a retirement destination to retirees and those persons and families who are planning retirement both in and outside of North Carolina.

- 1           (2) Assist North Carolina communities in their efforts to market  
2 themselves as retirement locations and to develop communities that  
3 retirees would find attractive for a retirement lifestyle.  
4           (3) Assist in the development of retirement communities and continuing  
5 care facilities under Article 64 of Chapter 58 of the General Statutes in  
6 order to promote economic development and a potential workforce to  
7 enrich North Carolina communities.  
8           (4) Encourage mature market travel and tourism to North Carolina to  
9 evaluate future retirement desirability and to visit those who have  
10 chosen to retire in North Carolina.

11       (c) Factors. – The Department shall identify factors that are of interest to retirees  
12 or potential retirees in order to inform them of the benefits of living in North Carolina.  
13 These factors shall be used to develop a scoring system to determine whether an  
14 applicant will qualify as a North Carolina certified retirement community and may  
15 include the following:

- 16           (1) North Carolina's State and local tax structure.  
17           (2) Housing opportunities and cost.  
18           (3) Climate.  
19           (4) Personal safety.  
20           (5) Working opportunities.  
21           (6) Health care and continuing care services.  
22           (7) Transportation.  
23           (8) Continuing education.  
24           (9) Leisure living.  
25           (10) Recreation.  
26           (11) The performing arts.  
27           (12) Festivals and events.  
28           (13) Sports.  
29           (14) Other services and facilities necessary to enable persons to age in the  
30 community with a minimum of restrictions.

31       (d) Certification. – The Department shall establish criteria for qualifying as a  
32 North Carolina certified retirement community. To be eligible to obtain certification as  
33 a North Carolina certified retirement community, the community shall meet each of the  
34 following requirements:

- 35           (1) Be located within 30 miles of a hospital and of emergency medical  
36 services.  
37           (2) Take steps to gain the support of churches, clubs, businesses, media,  
38 and other entities whose participation will increase the Program's  
39 success in attracting retirees or potential retirees.  
40           (3) Establish a retiree attraction committee. The retiree attraction  
41 committee shall fulfill or create subcommittees to fulfill each of the  
42 following:  
43           a. Conduct a retiree desirability assessment analyzing the  
44 community with respect to each of the factors identified by the

- 1                    Department and submit a report of the analysis to the  
2                    Department.
- 3                    b.    Send a representative of the retirement attraction committee to  
4                    attend State training meetings conducted by the 21st Century  
5                    Communities program during the certification process.
- 6                    c.    Raise funds necessary to run the program, organize special  
7                    events, and promote and coordinate the program with local  
8                    entities.
- 9                    d.    Establish a community image, evaluate target markets, and  
10                    develop a marketing and public relations plan designed to  
11                    accomplish the purpose of the Program.
- 12                    e.    Develop a system that identifies and makes contact with  
13                    existing and prospective retirees, that provides tour guides when  
14                    prospects visit the community, and that responds to inquiries,  
15                    logs contacts made, invites prospects to special community  
16                    events, and maintains continual contact with prospects until the  
17                    prospect makes a retirement location decision.
- 18                    (4)   Remit an application fee to the 21st Century Communities program  
19                    equal to the greater of ten thousand dollars (\$10,000) or the product of  
20                    fifty cents (50¢) multiplied by the population of the community, as  
21                    determined by the most recent census.
- 22                    (5)   Submit the completed marketing and public relations plan designed to  
23                    accomplish the purpose of the Program to the Department.
- 24                    (6)   Submit a long-term plan outlining the steps the community will  
25                    undertake to maintain or improve its desirability as a destination for  
26                    retirees, including corrections to any services or facilities identified in  
27                    the retiree desirability assessment.

28    **"§ 143B-437.101. North Carolina Certified Retirement Community Program –**  
29    **administration.**

- 30                    (a)   Administration and support. – Upon being certified as a North Carolina  
31                    certified retirement community, the 21st Century Communities program shall provide  
32                    the following assistance to the community:
- 33                    (1)   Assistance in the training of local Program staff and volunteers.
- 34                    (2)   Ongoing oversight and guidance in marketing and updating on national  
35                    retirement trends.
- 36                    (3)   Inclusion in the State's national advertising and public relations  
37                    campaigns and travel show promotions, including a prominent feature  
38                    on the Department's Web site.
- 39                    (4)   Eligibility for State financial assistance for brochures, support  
40                    material, and advertising.
- 41                    (5)   An annual evaluation and progress assessment on maintaining and  
42                    improving the community's desirability as a home for retirees.
- 43                    (b)   Expiration. – A community's certification under this section expires on the  
44                    fifth anniversary of the date the initial certification is issued. To be considered for

1 recertification by the 21st Century Communities program, an applicant community shall  
2 submit the following:

3 (1) A completed new application in accordance with the requirements of  
4 this Part.

5 (2) Data demonstrating the success or failure of the community's efforts to  
6 market and promote itself as a desirable location for retirees and  
7 potential retirees.

8 (3) The fee required by subdivision (4) of subsection (d) of this section."

9 **SECTION 2.** Pilot program. – The Second Career Center of Robeson  
10 Community College shall lead the implementation of the North Carolina Certified  
11 Retirement Community Program through a pilot project funded by an appropriation of  
12 one hundred sixty-five thousand dollars (\$165,000) over a period beginning July 1,  
13 2008, and ending July 1, 2010. During this pilot implementation, the community  
14 selection criteria and scoring methodology will be defined, applications will be  
15 developed, educational sessions will be conducted, and marketing strategies will be  
16 developed. The City of Lumberton will serve as the pilot community for this program.  
17 In recognition of the assistance the City of Lumberton shall provide in this pilot  
18 implementation, no application fee shall be charged for the City's initial application.  
19 The Second Career Center and the City of Lumberton shall jointly work to organize the  
20 community and prepare its application. In addition, the Second Career Center of  
21 Robeson Community College shall also undertake the following actions:

22 (1) Conduct educational sessions for the program.

23 (2) Solicit applications and make recommendations to the 21st Century  
24 Communities program for the certifications to be granted after July 1,  
25 2010.

26 (3) Hire a part-time program director and administrative assistant.

27 (4) Develop a Web site for the program.

28 (5) Provide continuous program assessment and improvement data to the  
29 21st Century Communities program.

30 **SECTION 3.** Section 2 of this act becomes effective July 1, 2008. Funding  
31 for and implementation of the North Carolina Certified Retirement Community  
32 Program's pilot project becomes effective July 1, 2008. The remainder of this act  
33 becomes effective July 1, 2010. No other community may be certified under the  
34 provisions of this act prior to July 1, 2010.