

GENERAL ASSEMBLY OF NORTH CAROLINA
SESSION 2007

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HOUSE DRH70687-MC-202C (3/4)

Short Title: Certified Retirement Community Program. (Public)

Sponsors: Representative Sutton.

Referred to:

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 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. – There is appropriated from the General Fund
10 to the Robeson Community College for the 2008-2009 fiscal year the sum of one
11 hundred sixty-five thousand dollars (\$165,000) for its Second Career Center. This
12 money shall remain available until June 30, 2010, and is intended to fund a two-year
13 pilot program. During this pilot implementation, the community selection criteria and
14 scoring methodology will be defined, applications will be developed, educational
15 sessions will be conducted, and marketing strategies will be developed. The City of
16 Lumberton will serve as the pilot community for this program. In recognition of the
17 assistance the City of Lumberton shall provide in this pilot implementation, no
18 application fee shall be charged for the City's initial application. The Second Career
19 Center and the City of Lumberton shall jointly work to organize the community and
20 prepare its application. In addition, the Second Career Center of Robeson Community
21 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.