

GENERAL ASSEMBLY OF NORTH CAROLINA
SESSION 2007

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SENATE BILL 1627
Finance Committee Substitute Adopted 6/24/08

Short Title: Certified Retirement Community Program.

(Public)

Sponsors:

Referred to:

May 19, 2008

1 A BILL TO BE ENTITLED
2 AN ACT TO CREATE THE NORTH CAROLINA RETIREMENT COMMUNITY
3 PROGRAM.

4 The General Assembly of North Carolina enacts:

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

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

8 **"§ 143B-437.100. North Carolina Certified Retirement Community Program –**
9 **creation; powers and duties.**

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

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

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

26 (2) Assist North Carolina communities in their efforts to market
27 themselves as retirement locations and to develop communities that
28 retirees would find attractive for a retirement lifestyle.

1 (3) Assist in the development of retirement communities and continuing
2 care facilities under Article 64 of Chapter 58 of the General Statutes in
3 order to promote economic development and a potential workforce to
4 enrich North Carolina communities.

5 (4) Encourage mature market travel and tourism to North Carolina to
6 evaluate future retirement desirability and to visit those who have
7 chosen to retire in North Carolina.

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

13 (1) North Carolina's State and local tax structure.

14 (2) Housing opportunities and cost.

15 (3) Climate.

16 (4) Personal safety.

17 (5) Working opportunities.

18 (6) Health care and continuing care services.

19 (7) Transportation.

20 (8) Continuing education.

21 (9) Leisure living.

22 (10) Recreation.

23 (11) The performing arts.

24 (12) Festivals and events.

25 (13) Sports.

26 (14) Other services and facilities necessary to enable persons to age in the
27 community with a minimum of restrictions.

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

32 (1) Be located within 30 miles of a hospital and of emergency medical
33 services.

34 (2) Take steps to gain the support of churches, clubs, businesses, media,
35 and other entities whose participation will increase the Program's
36 success in attracting retirees or potential retirees.

37 (3) Establish a retiree attraction committee. The retiree attraction
38 committee shall fulfill or create subcommittees to fulfill each of the
39 following:

40 a. Conduct a retiree desirability assessment analyzing the
41 community with respect to each of the factors identified by the
42 Department and submit a report of the analysis to the
43 Department.

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

26 **"§ 143B-437.101. North Carolina Certified Retirement Community Program –**
27 **administration.**

28 (a) Administration and Support. – Upon being certified as a North Carolina
29 certified retirement community, the 21st Century Communities program shall provide
30 the following assistance to the community:

- 31 (1) Assistance in the training of local Program staff and volunteers.
32 (2) Ongoing oversight and guidance in marketing and updating on national
33 retirement trends.
34 (3) Inclusion in the State's national advertising and public relations
35 campaigns and travel show promotions, including a prominent feature
36 on the Department's Web site.
37 (4) Eligibility for State financial assistance for brochures, support
38 material, and advertising.
39 (5) An annual evaluation and progress assessment on maintaining and
40 improving the community's desirability as a home for retirees.

41 (b) Expiration. – A community's certification under this section expires on the
42 fifth anniversary of the date the initial certification is issued. To be considered for
43 recertification by the 21st Century Communities program, an applicant community shall
44 submit the following:

- 1 (1) A completed new application in accordance with the requirements of
2 this Part.
3 (2) Data demonstrating the success or failure of the community's efforts to
4 market and promote itself as a desirable location for retirees and
5 potential retirees.
6 (3) The fee required by subdivision (4) of subsection (d) of this section."

7 **SECTION 2.** Pilot program. – The Department of Commerce, in conjunction
8 with the Second Career Center of Robeson Community College, shall lead the
9 implementation of the North Carolina Certified Retirement Community Program
10 through a pilot project. During this pilot implementation, the community selection
11 criteria and scoring methodology will be defined, applications will be developed,
12 educational sessions will be conducted, and marketing strategies will be developed. The
13 City of Lumberton will serve as the pilot community for this program. In recognition of
14 the assistance the City of Lumberton shall provide in this pilot implementation, no
15 application fee shall be charged for the City's initial application. The Department of
16 Commerce, the Second Career Center, and the City of Lumberton shall jointly work to
17 organize the community and prepare its application. The Department of Commerce
18 shall report on the implementation of this section by April 1, 2009, to the Joint
19 Legislative Commission on Governmental Operations and to the House and Senate
20 Appropriations Subcommittees on Natural and Economic Resources.

21 **SECTION 3.** Section 2 of this act becomes effective July 1, 2008. The
22 remainder of this act becomes effective July 1, 2010.