



Establishing a Retiree Attraction Program in Your Community

The attraction of retirees is a relatively new industry that is rapidly growing in the United States. The 50+ market is not only the fastest growing market sector but is also the wealthiest market sector in the country. Currently, this market controls half of America's discretionary income. Affluent retirees have steady incomes that are not vulnerable to cyclic economic activity and are used primarily for discretionary spending. The impact of this discretionary spending usually occurs at the local level, leading to increased economic development and job creation in the community of relocation.

More and more communities are beginning to recognize the benefits of attracting affluent retirees. These benefits include the following:

- Increase in retail and property tax base
- Increase in positive taxpayers (As a group, they pay more in taxes than they cost in government services.)
- Increase in community's bank deposit base
- Increase in retail sales
- Increase in local expertise in a variety of ways
- Increase in volunteers and contributors in churches and local service organizations

A complete identification of economic and intangible benefits provided by attracting affluent retirees to your community is available in the Alabama Cooperative Extension System's publication CRD-72, "Why Attract Retirees to Your Community?" To order this publication, contact Publications Distribution, Auburn University, Alabama 36849, (334) 844-1592.

Developing a Retiree Attraction Program

As with other forms of economic development, such as tourism and industrial development, retiree attraction is not likely to happen by itself. Proper assessment, thoughtful planning, and coordination of efforts are required to succeed. Eight basic steps in the development of a vibrant, successful retiree attraction program are presented in this publication.

Basic Steps

1. *Form a Retiree Attraction Committee.* Formally establish a Retiree Attraction Committee (RAC). The RAC's responsibility will be to develop, coordinate, and execute the overall retiree attraction program.

2. *Designate a Sponsor.* The local program should have an official sponsoring organization, such as the local chamber of commerce, economic development authority, or local governing body.

3. *Establish Official Community Support.* In an effort to assure the support of community leaders, a resolution by the local governing body endorsing the local retirement action effort is needed.

4. *Seek Unofficial Community Support.* The success of the local program depends, to a large degree, on the support of churches, clubs, businesses, and local media.

5. *Establish Committees.* Each community should develop a general Retiree Attraction Committee with a minimum of four to five subcommittees: community inventory/assessment, community relations/fundraising, marketing/promotion, connectors or ambassadors, and program evaluation.

6. *Develop a Community Profile.* The sponsor must develop a community profile similar to those used by many chambers of commerce. It would include such factors as crime statistics, tax information, recreation opportunities, and housing availability.

7. *Write a Marketing Plan.* The purpose of this plan is to detail the many things needed to successfully implement a program, focusing on the types of retirees the community desires and how the community expects to achieve its goals. The plan should include details of the following: a mission statement, identification of the target market, identification of the competition, an analysis of the community's strengths and weaknesses, and the strategies the local program will employ to attain its goals.

8. *Create a Prospect Package.* Send relevant information to prospective retirees in a timely manner and maintain contact through regular and systematic follow-up.

Organize the Program

Although each of the requirements listed in the previous section is important to the successful organization of the local retiree attraction program, a few are key to the program's initial success. These essential points are the *formation of committees*, the *community assessment process*, and the development of a *written marketing plan*.

Form a Retiree Attraction Committee (Step 1)

The first step in the successful formation of the local retiree attraction program should be the establishment of the general Retiree Attraction Committee. Potential RAC members should be those individuals in the local community who are able to provide leadership at the local level. Those who may be well-suited for RAC membership include the following:

- Individuals who are well known in the community and who have gained the respect of the community's citizens
- Current or former members of organizations, such as chambers of commerce, service clubs, churches, local government, and similar organizations
- Individuals who will personally commit their time and attendance to committee functions and will remain with the program for an extended time
- Individuals who are interested in seeing their communities grow and prosper
- Individuals who have a basic understanding of the needs and wants of the retiree

Designate a Sponsor (Step 2)

One of the important steps needed to link the retiree attraction program to the local community is having an official sponsoring organization. No retiree attraction program will reach its full potential without the support of the community. The retiree attraction committee should be formally part of the local chamber of commerce, economic development authority, local governing body, or similar organization.

Establish Official Community Support (Step 3)

Before the community can be sold to retirees, the retiree attraction program must be sold to the community. One method of assuring the support of the local community is to have a resolution passed by the local governing body recognizing and supporting the efforts of the Retiree Attraction Committee. This resolution will be a cornerstone in the development of the local program. A sample resolution is in the appendix of this publication.

Seek Unofficial Community Support (Step 4)

The entire community, not just the official leaders, such as elected officials, must support the retiree attraction program if it is to be completely successful. This building and establishing of support needs to be an ongoing task. One of the RAC subcommittees should assume the lead role in these efforts. A local community will generally find itself in one of three phases in the development of the retiree attraction program:

- *Interested*. Characterized by the belief that a retiree attraction program has benefits, but the community has not yet developed clear plans and steps of how to develop such a program.
- *Developing*. Characterized by a commitment to develop a retiree attraction program and efforts are being made to initiate such a program. At this stage, much of the initial groundwork has been completed and the community is on target to reach its goals.
- *Established*. Characterized by an organized and functioning retiree attraction program with a community that is focused, credible, and results oriented. Additionally, retirees have begun to make inquiry and retiree in-migration is actively occurring.

Critical to the eventual success of the retiree attraction program is for the retirement attraction committee and the local community to understand which of the above phases the program is in. Because each phase represents a logical progression to the next, it is important that the retirement attraction committee fully complete the current phase and prepare to lead the community into the next phase of development.

Establish Committees (Step 5)

After the retiree attraction committee is formed, each community should develop a minimum of four to five subcommittees:

- Community Inventory/Assessment
- Community Relations/Fundraising
- Marketing/Promotion
- Connectors/Ambassadors
- Program Evaluation

The retirement attraction committee and each subcommittee will function at their peak with a core group of dedicated professionals and volunteers. Committee membership should come from the following areas:

- Chambers of commerce
- Elected offices
- Health care industry
- Banks and financial institutions

- Local media
- Recreation and leisure services
- Retirees, with a mix of lifelong residents and in-migrant retirees
- Volunteer organizations
- Real estate
- Utility companies
- Economic development and research organizations
- Programs for seniors
- Restaurant, food, and hospitality services
- Local colleges and universities

All five of these subcommittees should be formed and staffed concurrently. However, the first subcommittee to take action is the Community Inventory/Assessment Subcommittee.

Community Inventory/Assessment Subcommittee

The responsibility of the Community Inventory/Assessment Subcommittee is two-fold:

- This subcommittee should conduct an honest and unbiased inventory and assessment of whether the community can offer the basics that retirees demand.
- This subcommittee should develop two more items: a *professional portfolio* containing brief biographies of professionals in the community and a *retirement community profile*. When completed, the *professional portfolio* can be maintained as a reference book at the headquarters of the retiree attraction program's official sponsoring organization and can be available for use by prospective and relocated retirees when selecting professionals for such things as medical, legal, financial, and other needs. The *retirement community profile* should be used in the program's marketing effort.

When these responsibilities are completed, this subcommittee should be disbanded. To ensure continued involvement in the program, the members should be placed in positions on one of the four other subcommittees. When this process is complete, the remaining subcommittees can begin their work.

Community Relations/Fundraising Subcommittee

The members of this subcommittee will do the following:

- Locate and maintain contact with current resident and in-migrant retirees in the community
- Act as salespeople for the program and build local support by creating awareness of the program through speaking engagements, media interviews, and other means
- Raise the funds necessary to run the program

- Organize special events, such as golf tournaments, dances, and other activities, to introduce newcomers to current residents

- Promote and coordinate the program with local entities such as

Bankers	Builders
Chambers of commerce	Churches
Civic clubs	Elected officials
Media	Merchants
Private industry	Realtors
Service clubs	Sports and hobby clubs
Subdivision associations	Veterans organizations
Colleges and universities	

Members of this subcommittee should be knowledgeable on the following three key points: (1) the mission of the retiree attraction committee, (2) how the community can become involved in the overall retiree attraction program, and (3) the advantages of having retirees move into the local community.

It should be noted that not only should the economic benefits of attracting retirees be stressed, but it is also important to stress the civic contributions retirees make to the community. The valuable knowledge and skills they possess from their life experiences are often shared with their new community through volunteer work. Given the opportunity, retirees have much to offer.

Because of the link between this subcommittee and those who stand to gain from the attraction of retirees—bankers, real estate professionals, shop owners, and other business professionals—it is natural that fundraising should be one of this subcommittee's primary responsibilities.

The spending patterns of the attracted retirees help identify the immediate beneficiaries of a successful retiree attraction program. These retirees drive late-model automobiles, are homeowners who tend to pay cash for a house, enjoy eating out on a regular basis, and have a considerable amount of discretionary income. Possible sources of funding include the following:

- Banks
- Commercial establishments
- Health care providers
- Insurance companies
- Public and private clubs
- Real estate companies
- Restaurants
- Utility companies

Primary beneficiaries such as these should prove helpful in raising funds needed to promote their community as a retirement destination. They should have a good understanding of the relationship between their businesses and the impact of having a significant number of retirees entering their community.

Marketing/Promotion Subcommittee

Members of this subcommittee should be creative idea people whose enthusiasm level is equal to the task. Those individuals with backgrounds in the media or advertising typically make good candidates for committee membership as do those whose businesses depend on advertising.

Marketing/Promotion Subcommittee members do the following:

- Evaluate target markets and determine effective and affordable methods to reach those markets
- Create and market the desired community image to those markets
- Develop and distribute promotional material
- Coordinate advertising and public relations campaigns

Connectors/Ambassadors Subcommittee

Connectors—also known as ambassadors—should be the most visible and important participants in the retiree recruitment process. They will not only make the first contact with the prospective retiree by letter or telephone but will probably serve as tour guides when the prospects visit the community.

The level of involvement displayed by the connectors will ultimately determine the success of the program.

Ideal connectors are retirees who have relocated to the community in the past five years. Because of this, they often have interesting stories to tell prospects regarding their move into the community. The most successful connectors are retired couples who tour other married couples.

The duties of the connector/ambassador include the following:

- Respond to inquiries by mail and telephone
- Maintain a log of all contacts made
- Provide tours of the community to visiting prospects
- Invite prospects to special community events — those that might attract visitors to the area
- Maintain continual contact with the prospect until the prospect's status changes (makes a relocation decision or asks not to be contacted again)

Program Evaluation Subcommittee

The Program Evaluation Subcommittee should be comprised of representatives from the other four subcommittees. The local retiree attraction program should be a dynamic organization developing and

maturing over time. Many facets of the program will require self-evaluation and maintenance, especially in the early, formative months. Program evaluation will help to review and clarify the progress of the Retiree Attraction Program and should be used to direct future program efforts.

This subcommittee's responsibilities include being accountable for the following:

- A progress review based on previously set goals
- The establishment of a retiree tracking system

One major outcome of the evaluation efforts by this subcommittee should be the accurate accounting of how the overall program has fared within an established time frame. This is usually one to two years since the goal of the program should be the attraction of a set number of retirees within a given time frame. (The Retiree Attraction Committee should set a realistic goal for the first two years of the number of retirees the community can realistically expect to attract.)

The other major task of this subcommittee should be the establishment of a system to track retirees to the community to determine if their relocation is a result of the efforts of the program. By measuring the program's progress, this subcommittee can determine how near it came to reaching its goal, and it will also have an invaluable resource directory of new retiree residents as evidence that retirees are indeed relocating to the area. The database of retirees resulting from these tracking efforts will then prove to be a valuable resource for newcomer volunteers to serve as connectors/ambassadors as part of the effort to continue retiree attraction.

Develop a Community Profile (Step 6)

It is of utmost importance to understand the factors that retirees believe are important in choosing a retirement destination. Being aware of the local community's strengths and weaknesses in relation to these factors is essential in determining the community's potential for a successful retiree attraction program. This assessment will determine features that can be used to promote the community.

Affluent retirees look for a combination of the following things: favorable climate, good medical care, quality housing at reasonable prices, safe and quiet neighborhoods, lower cost of living, quality recreational attractions, interesting cultural attractions, and convenient shopping.

To establish the desirability of a potential retirement destination, these amenities and features must be analyzed. David Savageau, in his book *Retirement Places Rated* (4th Edition, 1995) rates potential retirement locations on seven criteria: money matters, housing, climate, personal safety, services, work opportunities, and leisure activities.

These factors can be further explained as follows:

- **Money Matters.** Looks at typical personal income and taxes, and also measures the costs for items such as food and health care.

According to Savageau, “The best economic reason you will ever need for leaving your hometown is the chance for enjoying a dramatically lower cost of living someplace else during the final quarter of your life. If you choose the right place, it can make a difference between thriving comfortably or existing precariously, between paying higher taxes or paying no taxes.”

- **Housing.** Looks at costs, including property taxes, utility bills, and average sale prices. Notes whether condominiums, mobile homes, and rental apartments are available. Surveys have shown that single-family housing is the overwhelming favorite housing choice of retirees. Other options for retirement housing are specialized retirement and life-care communities. There should be an adequate supply of new, resale, and rental housing that will meet the needs of migrant retirees. Adequate could be defined as a housing market that includes a variety of two- and three-bedroom single family homes, town homes, patio homes, and condominiums priced from \$80,000 to \$150,000. This should be analyzed on the basis of available properties for sale per 1,000 population.
- **Climate.** Reviews winter discomfort factors, such as wind chill, and rates summer discomfort factors, such as humidity and dampness. Psychological factors, such as cloudiness, darkness, and fog, also receive scrutiny. Climate information is constantly listed near the top of relocation factors for retirees. In developing the Retiree Attraction Program for the local community, the local climate and terrain of the area will need to be described. To do so, the following should be prepared:
 - Average annual precipitation: total, rainfall, snowfall
 - Average summer and winter highs and lows
 - General landscape of the area
- **Personal Safety.** Measures the annual rate of violent and property crimes in each place and looks at the latest local five-year trends, whether up, down, or flat. One method of analyzing the personal safety factor is to analyze the crime rate per 1,000 population.
- **Services.** The services that most retirees have the most interest in are the following:
 - Health care
 - Transportation
 - Continuing education

Health Care. Americans become more concerned with health care at retirement than at any other time of their lives. Doctor visits tend to come more frequently and short hospital stays are likely. The concept of **life care**, which includes assisted living, rehabilitation, and skilled nursing as well as home health care, are all part of the health care package retirees deem important. In most cases, there should be a hospital within a 30-minute drive of the community.

Transportation. Access to and availability of transportation services are important to retirees.

Continuing Education. Retirement would be an empty time if there were not opportunities for learning new things. Currently, there are 36 states that have either passed laws or established policies that waive or reduce fees for academic credit for senior adults on a space-available basis at state-supported institutions. Two other opportunities for senior adult continuing education are the Institute for Learning in Retirement and the Elderhostel program, which is a nonprofit, educational organization offering inexpensive, short-term academic programs. Access to public libraries is another important factor for continuing education opportunities. Each community should have a geographic affiliation with a university or college.

- **Work Opportunities.** Compares the local prospects for jobs in three basic industries most promising to older adults: finance, insurance, and real estate; retail trade; and services.

While many retirees dream of a relaxed, pleasurable, and leisurely retirement, others find themselves working part-time during these years. Some will work to supplement their incomes, some will work or volunteer to simply occupy their time, and others may fulfill a life-long dream by starting their own businesses. Whether a volunteer, business entrepreneur, or a part-time employee, many retirees will be concerned with available employment opportunities.

One method of measuring the work opportunities in a community is the unemployment rate: a higher rate indicates a lack of available work opportunities and a lower unemployment rate indicates more potential employment opportunities for the retiree. In fact, some parts of the country with very low unemployment are actually experiencing a shortage of workers.

- **Leisure Living.** Counts recreational and cultural assets, such as public golf courses, good restaurants, symphony orchestras, opera companies, lakes, national parks, and state recreation areas.

Leisure living considers the recreational and cultural activities available to the retirees. These might include recreational activities such as boating,

camping, fishing, golfing, hiking, hunting, and physical fitness as well as cultural activities such as attending fairs and festivals and enjoying the visual and performing arts. Take a brief inventory and analysis of what your community offers in these activities.

Retirees consider all of these factors when contemplating relocation. Water, mountains, and scenic beauty have been and continue to be strong attractions to potential retirees. Consideration for health care, public transportation, and the performing arts would seem to favor larger communities in the relocation decision, but the size of a particular community is not the most important factor. Personal safety and cost of living favor smaller communities. The proper mix of all seven of these factors will determine whether your community has what it takes to be a retirement destination.

The primary purpose of the community assessment profile is to develop an overall profile of the local community built around these seven criteria. It is extremely important to have an understanding of how the local community fares when analyzed against these factors. When developing and analyzing the profile, consider the following three points:

- To successfully attract retirees a community *does not have to be* located in a Sunbelt state such as Florida or Arizona.
- To successfully attract retirees a community *does not have to offer* everything that a retiree desires.
- To successfully attract retirees a community *does need to have* enough positive factors to outweigh or neutralize any negative factors.

The appendix in this publication contains a suggested community assessment profile form designed to rate the local community based on Savageau's criteria. In an effort to determine perceptions regarding the community, the individual members of the Community Inventory/Assessment Subcommittee should complete the form, combining their responses into a single committee analysis on one form. The subcommittee should also have at least five community leaders complete the form. The responses from these five forms should then be combined on one form.

The Community Inventory/Assessment Subcommittee will now have two assessment forms: one with the responses of the committee members and one with the responses from the community. The subcommittee should then combine these two forms into one final community assessment profile.

Write a Marketing Plan (Step 7)

As stated previously, the purpose of this plan is to detail the many things needed to successfully implement a program, focusing on the types of retirees the community desires and how the community expects to achieve its goals. The plan should include details of the following: a mission statement, identification of the target market, identification of the competition, an analysis of the community's strengths and weaknesses, and the strategies the local program will employ to attain its goals.

The successful implementation of a retiree attraction program involves two distinct marketing efforts:

- The successful marketing of the retiree attraction program to the local community
- The successful marketing of the local community to potential retirees

One of the most important aspects of any economic development program is marketing. If you do not let individuals know about your community, how will they discover you? The purpose of this publication is to provide a model of the basic steps needed to develop an effective community retiree attraction program. Since this publication is designed to provide the basic model, it does not provide extensive details about any specific step, including marketing. Suggested marketing techniques designed to promote retiree attraction programs can be found in the Alabama Cooperative Extension System's publication CRD-74, "Marketing Your Community to Attract Retirees." To order this publication, contact Publications Distribution, Auburn University, Alabama 36849, (334) 844-1592.

Create a Prospect Package (Step 8)

After months of committee meetings and preparations, the first response is received—the first tangible evidence there is a viable target market and interest in the community as a retirement destination. At this point, the next step in the marketing process is *handling the response*. The response process follows these steps:

- Initial follow-up
- Telephone follow-up
- Long-term follow-up
- Visit by the prospect
- Decision time
- Long-term success through assimilation

The first step in *handling the response* is through *initial follow-up*. Two alternatives exist regarding the initial response to a prospect contact. The alternative should be chosen based on the budget of the local program, the source of program exposure to the prospect, and the type of information requested. Whichever choice is made by the local program it is

strongly recommended that the mailing be sent within two weeks of receipt of the lead. The alternatives are to send a general brochure with telephone number and tear-off reply card that the prospect can use to request specific information or to send a general information packet that will answer most questions a prospect would have including the following:

- Cost of living. This should be kept simple. For example, give the exact property taxes on a \$100,000 home.
- Climate data. Average seasonal temperatures, precipitation, etc.
- Medical services. The number of physicians and hospital information.
- Recreational opportunities.
- Attractions and events in or near the local community.
- Commercial and public transportation availability.
- Cultural offerings.
- Educational opportunities for adults.
- Shopping.
- Housing availability and rental information.

A personal letter from the retirement director or Retiree Attraction Committee chairman can also be included.

When compiling material for the information packet, take a hard look at it from the standpoint of the prospect. Resist loading the package with materials from various merchants and chamber of commerce members. As an example, too much medical data, nursing home, or funeral home information may cause prospects to think about the dark side of retirement, unwittingly causing them to think about staying where they are or moving near their children rather than to your community. It is strongly recommended that you develop an information packet whenever possible.

After the initial brochure or information packet has been mailed (within two weeks of receipt of the lead), the second step is the *telephone follow-up* call placed by a connector, someone so designated on the Connectors/Ambassadors Subcommittee. The *telephone follow-up* call should be made within 10 to 14 days after the information packet has been sent. The purpose of the call is to

- Ensure that the prospect received the material
- Answer any questions the prospect may have
- Determine if further information is required by the prospect
- Gather demographic information, such as profession, hobbies, interests, etc., for a prospect file
- Encourage a local visit by the prospect
- Make a prospect feel that he or she already has a friend in the local community

While this contact could result in a prospect visit in a few days, this hopefully ongoing relationship normally evolves over weeks, months, or even years. Providing this personal touch is essential to building a successful retiree attraction program.

A regular schedule should be maintained for connectors to make these calls. Some calls will need to be made in the evening to reach those prospects who work during the day. It is the responsibility of the connectors to qualify each prospect in regard to a proper fit with the local community. Over time, these connectors will discover what prospects desire in a retirement destination, whether the local community has the ability to satisfy their desires, and how to improve the local program.

The third step in the response process is through *long-term follow-up*, and the reinforcement process begins. The local community can maintain this follow-up through several methods:

- Some communities use a quarterly mailing in newsletter form, featuring events in the community that will be of interest to new retirees.
- Some communities invite prospects to special events throughout the year, such as a Christmas tour.

Whatever the form of contact chosen, whether written or by telephone, contact must be maintained with a prospect until he or she has moved or has requested that contact be terminated. *Do not* let a prospect slip away because of a lack of interest on the part of the local community.

The fourth step in the response process will be a visit *by the prospect* to the local community. The prospect's connector should conduct the tour, which should highlight the following:

- Attractions and history
- Shopping
- Medical facilities
- Colleges and universities
- Overview of available housing
- Recreational opportunities, such as public and private golf, swimming, tennis, and walking facilities; parks, lakes, etc.
- Transportation facilities, such as airports, bus stations, or train depots

The prospect may request specific information about churches or certain types of housing. The connector can add these to any tour. All tours should be reasonable in both scope and time.

The fifth step in the response process is *decision time*. After the prospect visit to the local community, one of three things will occur:

- They will eliminate the local community from their list of choices.

- They will want to know more about the local community and plan another visit.
- They will move to the local community.

Should the prospect decide against moving, the local community should attempt to discover why. The reasons behind their decision should be honestly probed, without offending the prospect. They should be told that the local community has a desire to improve and wishes to know the reason they decided against relocation. If known, prospects will usually disclose it, but it should not be surprising if they themselves do not know.

After the initial visit, the prospect may want more information and plan another visit. Supply any requested information since it may serve to reinforce the decision-making process. At this stage, prospects will realize that they have a contact in the local community on whom they can rely for answers.

The most desirable action is that prospects have found that the local community meets their needs and desires. They have chosen the local community as their retirement destination and they move.

The final step of the response process is to ensure newcomers that they are welcome. This will lead to *long-term success through assimilation*, which can be achieved through several methods:

- *Newcomer events*, such as picnics, dances, golf tournaments
- *Special organizations* for both in-migrant and in-place retirees
- *Institute for Learning in Retirement* in connection with the local college or university
- *Special projects*, such as environmental, educational, and community activities sponsored by the local connectors. These might include beautification or adopt-a-school projects.



Conclusion

While this publication is an effort to provide guidance, it is the final responsibility of each community to develop a retiree recruitment program that is best suited for them. The Alabama Advantage for Retirees and Relocation and the Alabama Retiree Relocation Association are available to answer questions — “The door is always open.”

At this point, any local community sincerely interested in developing an organized and effective retiree attraction program should now possess knowledge of the basic steps involved. By combining the information in this handbook and local ideas, a plan of action can be developed for creating a retiree attraction program.

Several points should be emphasized as a review of this process:

- A core group of interested individuals should be organized as the *Retiree Attraction Committee*.
- Each committee member should be knowledgeable about the committee’s goals regarding program development and the steps involved in establishing the program and have the commitment to succeed.
- The program should be developed and operated through the five *subcommittees*.
- Support for the program’s efforts should be sought from the local governing body, businesses, and the community at large.
- Support should be built through the designation of a *sponsoring organization* and a *resolution of official community support*.
- To properly evaluate the community and promote the program, a *community inventory and assessment process* must be completed.
- Prepare a *general information packet* as well as a *brochure* for distribution to those who inquire about the local community as a retirement destination.
- Conduct follow-up.
- Conduct *periodic program evaluations*.
- Remember that the process of attracting retirees is a long-term venture. Don’t expect too much too soon—it takes time to establish a successful program.

The ultimate goal of the Alabama Advantage for Retiree and Relocation Program is to get retirees to consider retirement in Alabama. The goal of the local program is to persuade them that their community is right for them.

Additional Helpful Publications

Other publications that may be helpful in establishing a community retiree attraction program include the following:

- “Alabama’s Retirement Safe Haven.” Alabama Department of Revenue, Office of Taxpayer Advocacy, Room 4116 Gordon Persons Building, 50 North Ripley Street, P.O. Box 327001, Montgomery, Alabama 36132. (334) 242-1055.
- “Marketing Your Community to Attract Retirees.” CRD-74. Alabama Cooperative Extension System, Publications Distribution, Auburn University, Alabama 36849. (334) 844-1592.
- “Retiree Development: A How-To Guide Book.” Mark Fagan (author). Center for Economic Development, Jacksonville State University, 700 Pelham Road North, Jacksonville, Alabama 36265. (256) 782-5324.
- “Welcome to Alabama.” CRD-70. Alabama Cooperative Extension System, Publications Distribution, Auburn University, Alabama 36849. (334) 844-1592.
- “Why Attract Retirees to Your Community?” CRD-72. Alabama Cooperative Extension System, Publications Distribution, Auburn University, Alabama 36849. (334) 844-1592.



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Your Experts for Life

CRD-73

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For more information, call your county Extension office. Look in your telephone directory under your county's name to find the number.

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Appendix

RESOLUTION

Whereas, many retirees today are younger, healthier, and financially independent, and;

Whereas, many retirees today will relocate to an area that offers a lifestyle more compatible with that which the retiree is seeking, and;

Whereas, retirees who relocate bring with them financial resources, retirement incomes, life experiences, work skills, time, and talents which become part of the new community, and;

Whereas, new retirees create jobs, income, and resources in the community and add to the creation of a strong and stable economy;

Be it therefore resolved that,

The (City Council, County Commission, etc.) of (your community's name) recommends the establishment of a "Retiree Attraction Committee" whose purpose shall be to assess, develop, and promote our community as a retirement destination community and that this Committee may elect officers to provide leadership and direction for the Committee, appoint members to the Committee, set meeting times and places, maintain written minutes of Committee meetings, establish subcommittees for carrying out the work of the Committee, and otherwise conduct business of such a nature so as to develop and promote the good name of this community as an area in which retirees who live here will want to stay and as a place where other retirees will choose to live.

Community Assessment Profile

Health Services

How many hospitals are there in the area? _____

How many family practitioners are there in the city? _____

How many specialists are there in the city? _____

What is the availability of special services, such as therapists? _____

Are home nursing services good? _____

Are pharmacies accessible? Hours of operation? _____

Other comments: _____

Housing

Is a wide range of housing available? _____

What is the median sale price of a two-bedroom home? _____

What is the median sale price of a three-bedroom home? _____

Views/waterfront costs? _____

Are farms available? _____ If so, what is the price range? _____

Are quality apartments available? _____ Median monthly rent? _____

Are condos/town homes/garden homes available? _____ Median price? _____

Are assisted living or continuing care retirement communities available? _____

As of this date, how many residential properties are currently offered for sale in your community?

_____ In your county? _____

What is the population of your community? _____ Of your county? _____

Other comments: _____

Climate

How would you define the climate? (Please use accurate terms.) _____

Rain: Annual average and heaviest during which months? _____

Snow: Annual average and heaviest during which months? _____

Humidity: Annual average and heaviest during which months? _____

Air quality/problems: _____

Public Safety

How safe is your area? _____

What is your crime rate per thousand? _____

What types of crimes are most prevalent? (Be precise.) _____

What types of emergency services are available? _____

Is the emergency system effective? _____

What is the average response time? _____

Other comments: _____

Continuing Education Opportunities

Is there a university, college, or community college in your community? _____

If so, please list: _____

Do any of these institutions offer free or reduced tuition for students aged 50+ on a space available basis? _____

Is there an Institute for Learning in Retirement in your community? _____

Utilities

What is the quality of the telephone service? _____

Is special pricing available for seniors? _____

How are most homes heated? _____ Average monthly cost? _____

How are most homes cooled? _____ Average monthly cost? _____

What is the electric rate per kilowatt hour? _____

Is natural gas available? _____ If, so what is the rate? _____

How are television and radio reception? _____

How many broadcast television channels are available? (Identify.) _____

How many radio stations serve the area? _____

Is cable television service available? _____ If so, what is the basic rate? _____

Are any or all of the above rates believed to be reasonable? _____

Other comments: _____

Transportation

What types of public transportation are available? _____

Are they easy and convenient to use? _____

Please list areas that can improve public transportation: _____

Other comments: _____

Restaurants

What types of restaurants are available (fast-food, family, fine dining)? _____

Recreation

What types of community services and facilities are available? _____

What types of sporting facilities are available for senior citizens? _____

How many golf courses are in the area? _____ Public _____ Private _____

How many tennis courts are in the area? _____ Public _____ Private _____

How many swimming pools are in the area? _____ Public _____ Private _____

How many exercise facilities and walking trails are available? _____

Public _____ Private _____

Is there a YMCA or a YWCA in the area? _____

Are fishing and hunting easily accessible and available to the public? (Please describe options.) _____

Are there organized activities, such as dances, available to seniors? (Please list.) _____

What types of entertainment and cultural events are available? _____

Other comments: _____