



2014-2015 Criteria for the Retire Tennessee Program

Below are the criteria for participation in the Retire Tennessee program initiated by the Rural Development Division of the Tennessee Department of Economic and Community Development. Interested communities must have completed all pre-requisite work before application to the Retire TN program.

Endorsement

Each **new** community must have broad-based community support and a resolution by the local governing body endorsing the participation in the Retire TN Program.

Due September 15, 2014

Retiree Committee

The committee must have supporting documentation for the following: Community Inventory & Assessment Form; Marketing/Promotion Plan, and Evaluation Plan of Action. Please let Retire TN Director know dates of meetings so she can attend one per year.

Names of members and anticipated dates of meetings are *Due Dec. 5, 2014*.

Marketing Plan

Develop a marketing plan that includes steps your community will undertake to increase its desirability as a retirement destination. This plan should be reviewed and a work plan developed annually *due Dec. 5, 2014*. The retiree committee must develop the annual work plan to minimally include:

- Mission statement
- Identification of your target geographic region market
- Marketing strategies the community will deploy to attain the goals of the program with a time line

Financial Partnership with the State of Tennessee

A signed compliance document and a check in the amount of \$2000 which pays for trade show marketing and lead generation **will be due the State of Tennessee upon notification of your acceptance into the Retire TN Program**. Your financial commitment of \$2000 will entitle you to participate at one or more of the Live South Trade shows. *Due August 31, 2014*.

Operating Budget

Must have an operating budget that reflects \$0.25 per capita, as determined by the U.S. Census Bureau, which will be supplied to you by the Retire TN Director. This budget must support the following: ***Due Dec. 5, 2014.***

- Print retiree recruitment brochure
- **Stand alone URL web presence**
- Postage
- Person to attend one trade show
- Co-op advertising opportunities offered by the State –this line item **must be at least \$1000.00 \$1000 is due Aug. 31, 2014**
- Educational opportunities or training

Staff

The sponsoring organization must be able to commit a minimum of 5 hours per week from a paid staff person within the organization.

Retiree Attraction Brochure

A community must have a retiree attraction brochure. A tear-off reader response card is optional.

- Minimum of 10,000 brochures must be printed for distribution
- Brochure must detail and illustrate natural resources and amenities offered by the community
- **Must include the Retire TN URL and logo**
- Must be postal approved with preferably 80 lb. cover stock
- Must receive approval from the Dept. of ECD prior to printing –**this includes re-prints.** Must not include a planned retiree development picture on the cover but planned developments **can** be listed with contact information
- Cannot include advertising
- **Brochure must be completed by September 1, 2014.**

Printed Template for Retire TN Folder

You will receive 1,500 stationary sheets to be printed with your community's information. This fact sheet can be front and back of supplied paper and must detail and illustrate the same amenities, resources, etc. that is shown on your brochure. It does not have to include the Retire TN logo since it is a part of the stationary. It **can** include planned retiree development pictures with their name but **cannot** list their contact info or website. No advertising is allowed on the printed template: i.e. Banks, Assisted Living facilities, Realtors. Your sheet must be approved prior to printing by ECD. 1500 sheets will be ***due August 15, 2014 for our September trade show.***

Web Presence

Communities must have a retiree link on county, city, and/or Chamber web home page. **This site should include personal testimonials** from retirees and must be linked to the ECD's Retire TN web site by using our logo. A preference would be to have a separate URL for the retiree recruitment program. The program web site must include:

- Easily available list of organizations contact information (email, 1-800 number, mailing address)
- Capability to provide feedback emails
- Tracking number of visits to the site

Discover Tennessee Website Page

At the Live South Real Estate Trade shows, communities are given an opportunity to offer a Discovery Tour Promotion at discounted rates to everyone that walks thru the door. Retire Tennessee will have a sheet that will direct attendees to our website and our Discover TN Tour page. This will give you direct contact at the shows for you to book a tour in your community. You will be required to have a Discovery (name of your site) web page offering a tour. This is an opportunity for you to advertise a hotel, development, or property that would be willing to host a visit from a potential retiree.

This page will need to be up and running by as soon as possible or by the first Ideal Living Expo.

Trade Show Representation

A community must have a representative present to promote the community at **one** of six trade shows in which the Retire TN Program participates. It is **preferred** that the representative is the one that will be responsible for managing the retiree program. This representative cannot be a commercial developer or realtor.

Trade Show Lead Follow-Up

Each community must follow up on trade shows leads with contact within 60 days of trade show. This contact can be by personal letter, email, direct response piece or phone call. The lead follow up must comply with the signed agreement and compliance document with the State. (See **Financial Partnership with the State of Tennessee**)

Inquiry Tracking

Each community must complete the monthly retiree inquiry tracking report from ECD that is due the **15th of every month**. Failure to comply could result in non-participation in the Retire TN Program. (Forms will be supplied by the Retire TN Director)

Marketing Response Piece

Each community must have a marketing packet for distribution to prospective leads relevant to their needs. It must include the criteria retirees are seeking:

- Money matters
- Housing
- Climate
- Personal Safety
- Services
- Work opportunities
- Leisure-time activities

Retire TN Program Attendance

In order to meet new challenges and ensure a strong retiree organization in the community, someone from the organization must attend 2 of the following:

- Retire TN Program meetings (TBD – two per year)
- ECD Governor's Conference
- Tourism Governor's Conference

The annual AARC (American Association of Retirement Communities) Conference will be in October of 2014 in Memphis, TN. **Your attendance is highly recommended** since this is an excellent educational/training opportunity.