

# **Encore Louisiana Commission Certified Retirement Community Program Guidelines & Application**



**Office of the Lieutenant Governor  
Louisiana Department Culture Recreation and Tourism  
Louisiana Office of Tourism  
P.O. Box 94291  
Baton Rouge, Louisiana 70804**



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## Section 1

### Overview of the Program

The Encore Louisiana Commission is mandated by the Louisiana Legislature.

#### **Encore Louisiana Commission**

##### **Legislation:**

##### CHAPTER 10-A. ENCORE LOUISIANA COMMISSION

##### §1317. Legislative findings and determinations

A. Because the legislature recognizes the existence of an emerging industry with the fifty year old and above demographic, it finds that the state has a role and responsibility in developing Louisiana as a desirable place of residence for this age cohort. The legislature also recognizes that residents and tourists fifty years old and above spend a disproportionate amount of their disposable income on goods and services, which in turn creates new jobs. In addition, tax dollars generated from these incomes provide a boost to state and local economies. The legislature also finds that major aspects of this emerging industry are related directly to both tourism and economic development and that there should be a concerted effort by the state to focus on or serve the growing fifty year old and above market.

B. Because the fifty year old and above demographic is a potential source of economic growth for Louisiana, the legislature determines it is necessary and essential to create the Encore Louisiana Commission to engage in developing, promoting, and marketing Louisiana as a destination for residents and tourists fifty years old and above.

Acts 1999, No. 1099, §2; Acts 2009, No. 342, §3.

#### **Louisiana Certified Retirement Community Program**

The Encore Louisiana Commission will be charged with the goal of setting the guidelines and requirements in developing the criteria for a destination to become a Louisiana Certified Retirement Community.

The purpose of a retirement community certification program is to encourage tourism and economic development. The prospect of 76 million baby boomers nearing retirement has caught the attention of many states and communities because the economic benefits to the places where they end up retiring are enormous. States not only want to encourage new residents to retire in their communities, but they also want to keep existing residents.

The Louisiana Certified Retirement Community Program will recognize places in Louisiana that the commission substantiates as premier locations for retirees. Communities selected for certification will receive inclusion in state-level marketing efforts, networking opportunities and possible grant funding to support the program.

The Encore Louisiana Commission will require that communities complete an application and go through a screening process conducted by the Encore Louisiana Commission before becoming a Louisiana Certified Retirement Community.

The Encore Louisiana Commission has final approval on the application process.

**A Louisiana certified retirement community the Louisiana Office of Tourism will:**

- Promote the certified community as a Louisiana certified retirement community to retirees and potential retirees both in and outside of Louisiana.
- Assist Louisiana certified retirement communities in their efforts to market themselves as desirable retirement locations and to develop communities that retirees would find attractive for a retirement lifestyle.
- Assist Louisiana certified retirement communities in enriching their communities resulting in positive economic development.
- Encourage tourism to the Louisiana certified retirement community.
- Be eligible to attend consumer shows or golf shows with the Louisiana Office of Tourism.

An applicant community must be a unit of general local government (a city, a parish or the official DMO of the destination). Neighborhood Associations do **not** qualify as an eligible entity for the Louisiana Certified Retirement Community designation.

The applicant must designate a single sponsor/local contact person who will be responsible for working with the point person of the Encore Louisiana Commission, Mary Perrault Williams, during the application process and will serve as the primary contact for disseminating information to potential retirees through the certified retirement community program if the certification is approved. The sponsor should be part of a recognizable entity within the community (such as a tourist commission, convention and visitors bureau, chamber or economic development organization), have physical location with regular office hours, and should have the capacity and resources to manage the community's retirement recruitment efforts.

Sponsor/Local Contact Person's duties may include, but not be limited to:

- Obtaining local volunteer support to maintain the program, assist in the training of volunteers where necessary.
- Obtaining local support by publicizing the program on the local level, utilizing methods such as media publicity, speeches to local groups, etc.
- Developing and maintaining a tracking system of leads.
- Developing and maintaining a marketing plan to promote the city as a retirement destination.
- In communities where it is feasible, developing a tour for prospective retirees.
- Developing response materials to send to prospective retirees.
- Keeping the Encore Louisiana Commission point person advised of the local events to be included on the state's internet site.
- Collaborating with the local community college or university to establish programs for retirees in the area.
- Attending Encore Louisiana Commission state meetings.
- Submitting Encore Louisiana Commission reports timely.

The applicant must include a list of the Community's Retirement Board/Panel members and the organizations each member represents.

## Section 2

### Application Preparation Information

**Application Requirements** – An applicant must meet and document ALL of the following requirements for its application to be considered.

1. Designate a board or panel to serve as the community’s official program sponsor. List the local contact person.
2. Complete and sign an application form.
3. Complete the checklist.
4. Provide a retiree desirability assessment. This self-assessment, which will help determine your community’s desirability, should include facts regarding crime statistics, tax information, recreational opportunities, housing availability and other appropriate factors as described below.
5. Complete the score sheet by self-scoring the application.
6. Letters of community support from local organizations, businesses, and elected officials.
7. Provide a resolution.

*Sample resolution to be put on sponsoring organization letterhead:*

We the \_\_\_\_\_ (governing body) do verify that we are the governing body for the \_\_\_\_\_ (city’s name) Louisiana Encore Commission program and we do hereby apply for certification.

Being fully aware of the guidelines and requirement for certification status to become a Certified Louisiana Retirement Community with the Louisiana Encore Commission from 2019-2024.

We recognize this certification will be used for marketing and promotions for \_\_\_\_\_ (city’s name) as a Certified Louisiana Retirement Community, this the \_\_\_\_\_ day of \_\_\_\_\_, 2019.

Signatures:

\_\_\_\_\_  
Head of Sponsoring Organization

\_\_\_\_\_  
Certified Retirement Director

\_\_\_\_\_  
Witness

\_\_\_\_\_  
Witness

8. Complete a marketing plan outlining the steps the community will undertake to implement and to maintain its desirability as a destination for retirees, including:
  - a. the mission as applied to being a Louisiana certified retirement community
  - b. the target market
  - c. the goal(s) of the community
  - d. the strategies the community will employ to attain the goals of the program
  - e. an outline of plans to correct any facility and service deficiencies identified in the retiree desirability assessment

### Application Process –

1. Each applicant must submit a completed application. Applications are available from the Louisiana Encore Commission office, contact Mary P. Williams at [mpwilliams@crt.la.gov](mailto:mpwilliams@crt.la.gov) or call 225-342-8207.
2. Completed applications should be submitted to:

Mary Perrault Williams  
Louisiana Encore Commission  
Louisiana Office of Tourism  
1051 N. Third Street  
Room 332  
Baton Rouge, Louisiana 70802
3. Encore Louisiana Commission will score the applications and review the applications for eligibility and completeness. The applicant will be notified of any deficiencies and given 20 days to rectify the deviancies. Staff may work with the applicant to improve or modify the application, with the intent of improving the application and helping the applicant achieve certification. An application containing an excessive number of deficiencies, or deficiencies of a material nature, will be determined incomplete and may not be considered for certification.
4. After the scoring and application process is complete, staff will make a recommendation for approval or denial of the request for certification to the Encore Louisiana Commission. The Lt. Governor will make the final decision.
5. The Encore Louisiana Commission point person will notify the applicant of approval or denial of the application within 90 days of the date of the receipt of the completed application.
6. An application that has been withdrawn or declined for any reason may be resubmitted during the next eligibility period.

**Contents of the application and Binder Preparation** – All application information should be in a three-ring binder. The binder should be organized and labeled as indicated below. An electronic copy of all documents is not required, but may help expedite the application review process. Send electronic copies to the attention of Mary Perrault Williams at [mpwilliams@crt.la.gov](mailto:mpwilliams@crt.la.gov)

1. **Tab 1:** Completed and signed application form with completed check list.
2. **Tab 2: Detailed Retiree Desirability Assessment.** The Detailed Retiree Desirability Assessment is intended to help the community identify areas of strengths and weaknesses and should help the community determine the type of retirees the community believes would be interested in moving to the area. The assessment is intended to serve as the basis for the community’s marketing and planning efforts. **The Detailed Retiree Desirability Assessment, which can include photos, graphs, maps and any other references should cover the list found in Section 4 under – Detailed Retiree Desirability Assessment**
3. **Tab 3:** Completed Score Sheet.
4. **Tab 4:** Letters of community support.
5. **Tab 5:** Completed resolution.
6. **Tab 6:** A marketing plan detailing:
  - a. the mission as applied to being a Louisiana certified retirement community
  - b. the target market
  - c. the goal(s) of the community
  - d. the strategies the community will employ to attain the goals of the program
  - e. an outline of plans to correct any facility and service deficiencies identified in the retiree desirability assessment
7. **Tab 7:** List the Community’s Retirement Advisory board/panel to include members and the organization they represent. Include contact information for the community’s retirement point person.

## Section 3

### **Information to Know if an Application is Approved**

#### **Assistance to Louisiana Certified Retirement Communities –**

Once a community is certified, the Encore Louisiana Commission through the Louisiana Office of Tourism will:

- Promote the certified community as a Louisiana certified retirement communities to retirees and potential retirees both in and outside of Louisiana.
- Assist Louisiana certified retirement communities in their efforts to market themselves as desirable retirement locations and to develop communities that retirees would find attractive for a retirement lifestyle.
- Assist Louisiana certified retirement communities in enriching their communities resulting in positive economic development.
- Encourage tourism to the Louisiana certified retirement community.
- Ability to attend consumer shows or golf shows with the Louisiana Office of Tourism.

#### **Use of Encore Louisiana Commission or other LOT Marks**

Certification under this program shall allow the approved community to use the mark that will be created by the Encore Louisiana Commission to certify that the community is indeed part of the Encore Louisiana Commission Certified Louisiana Retirement Community Program.

#### **Expiration and Renewal of Certification**

A community's certification expires on the fifth anniversary of the date of the initial certification is issued.

The Encore Louisiana Commission reserves the right to evaluate areas on a year to year basis.

To be considered for recertification by the Encore Louisiana Commission, and applicant community must:

- Complete and submit a new application.
- Submit data demonstrating the success or failure of the community's efforts to market and promote itself as a desirable location for retirees and potential retirees.

## Section 4

### Application Packet

All fields of this application must be completed. The application must be signed and dated by the community's chief elected official or his/her designee to represent the community.

At the end of the application is a checklist of the items on the Retiree Desirability Assessment that are to be included in the binder under Tab 2. A score sheet follows the assessment, which breaks out the scored details that must be included to receive the specified points. The community's size based on population, will place the applicant in a small medium, or large community category. Each category has a minimum point level to qualify for certification.

Responses to the topics on the Retiree Desirability Assessment must be placed under each category.

**Scoring Criteria** – The following is a list of the selection criteria used by the Encore Louisiana Commission when reviewing the applications. Applicants are scored on four (4) sections, as follows. There are a total of 185 possible points.

Retiree Desirability Assessment	140 points
Community Support	20 points
Marketing Plan	25 points

**Small communities:** Cities or parishes with less than 10,000 in population (per most recent Census) must have at least 130 points to be certified as a Certified Louisiana Retirement Community.

**Medium-sized communities:** Cities or parishes with less than 10,001 to 50,000 in population (per most recent Census) must have at least 150 points to be certified as a Certified Louisiana Retirement Community.

**Large communities:** Cities or parishes with greater than 50,000 in population (per most recent Census) must have at least 170 points to be certified as a Certified Louisiana Retirement Community.

Failure to submit all documentation to support each scoring section will result in the loss of points. All documentation must be organized as outlined in Section 2, Application Preparation.



# Detailed Retiree Desirability Assessment

*(Respond below each numbered item and include the needed information on each topic)*

## 1. Community Overview

Demographics  
Geography  
Climate

## 2. Tax Structure/Financial

The state and local tax structure including local property tax rate and local sales tax rate  
Tax of homesteads for residents 65 years of age or older

## 3. Local Housing Availability

Current local housing market including resale and rental property (single-family & multi-family options in a variety of price ranges)  
Resale and rental properties designed to meet the needs of disabled or mobility-impaired individuals  
Inventories of property that are convenient to public transportation services

## 4. Safety

Public safety and crime index  
Is crime index at or below the state average?

## 5. Employment and Volunteer Opportunities

Local employment opportunities (full-time, part-time, business opportunities in a variety of trade, professional, and services)

## 6. Health Care Services

Healthcare availability for retirees – hospitals, physician services, pharmacy services, long-term care options  
Acute Care General Hospital in the Area  
Chronic Care Management Services  
A reasonable number of physicians accepting Medicaid and Medicare  
Home Health Care

## 7. Emergency/ Non-Emergency Medical Services

24-hour emergency medical service (fully certified and staffed)  
Non-Emergency Medical Transportation

## 8. Public Transportation, Major Highways, Airports

Major highways in area  
Traffic: Heavy or Light  
Airports: Proximity to access  
Welcome Signs/Overall Signage  
Public Transportation Systems: Air, Rail, Taxi, Uber, Lyft, Bus Service

**9. Continuing Education**

- Universities: have credit and non-credit courses?
- Community Colleges: does it have credit and non-credit courses
- Museums
- Public Library
- Zoos
- Gardens

**10. Leisure Living**

- Socialization: Opportunity to interact with citizens of all ages

**11. Recreational Areas and Facilities** including, but not limited to:

- Public parks
- Boating
- Fishing Facilities
- Golf Courses
- Tennis Courts
- Swimming Pools
- Hiking
- Walking and Cycling Trails
- Fitness Center
- Senior and Community Centers

**12. Performing Arts** including, but not limited to:

- Concerts
- Theatre
- Dance

**13. Festivals and Events**

- Schedule of festival and events
- Volunteer opportunities

**14. Sports at all Levels**

- Participation opportunities
- Spectator opportunities
- Volunteer opportunities

**15. Military Bases**

- Located within 50 miles of the area

**16. Additional information**

- Costs of electricity and water
- Availability of Cable/Satellite television
- Availability of high-speed internet service
- A reasonable number of physicians accepting Medicaid and Medicare
- Pedestrian friendly elements such as sidewalks, curb cuts
- Pick-up and delivery services from stores and restaurants
- Affordable cost of living
- Litter control
- Bilingual (percentage of people who speak French, Spanish or another language)

Community Name: \_\_\_\_\_

### Score Sheet

1. Community Overview	Included or Addressed? Yes or No	Possible Points	Points scored (Louisiana Encore Commission use only)
Does the assessment include: <ul style="list-style-type: none"> <li>• Demographics</li> <li>• Geography</li> <li>• Climate</li> </ul>		5	
2. Tax Structure/Financial	Included or Addressed? Yes or No	Possible Points	Points scored (Louisiana Encore Commission use only)
The state and local tax structure including local property tax rate and local sales tax rate		5	
Tax of homesteads for residents 65 years of age or older		5	
3. Local Housing Availability	Included or Addressed? Yes or No	Possible Points	Points scored (Louisiana Encore Commission use only)
Current local housing market including resale and rental property (single-family & multi-family options in a variety of price ranges)		5	
Resale and rental properties designed to meet the needs of disabled or mobility-impaired individuals		5	
Inventories of property convenient to public transportation services		5	
4. Public Safety	Included or Addressed? Yes or No	Possible Points	Points scored (Louisiana Encore Commission use only)
Public safety and crime index		5	
Is crime index at or below the state average?		5	
5. Employment and Volunteer Opportunities	Included or Addressed? Yes or No	Possible Points	Points scored (Louisiana Encore Commission use only)
Local employment opportunities: full-time, part-time, business opportunities in a variety of trade, professional, and services		5	
6. Health Care Services	Included or Addressed? Yes or No	Possible Points	Points scored (Louisiana Encore Commission use only)
Healthcare availability for retirees: hospitals, physician services, pharmacy services, long-term care options		5	
Acute Care General Hospital in the Area		5	
Chronic Care Management Services		5	
A reasonable number of physicians accepting Medicaid and Medicare		5	
Home Health Care		5	

<b>7. Emergency/Non-Emergency Medical Services</b>	Included or Addressed? Yes or No	Possible Points	Points scored (Louisiana Encore Commission use only)
24-hour emergency medical service, fully certified & staffed		5	
Non-Emergency Medical Transportation		5	
<b>8. Public Transportation: Major Highways, Airports</b>	Included or Addressed? Yes or No	Possible Points	Points scored (Louisiana Encore Commission use only)
Major highways in area Airports: Proximity to access		5	
Traffic: Heavy or Light, car and air Welcome Signs/Overall Signage		5	
Public Transportation Systems: Air, Rail, Taxi, Uber, Lyft, Bus Service		5	
<b>9. Continuing Education</b>	Included or Addressed? Yes or No	Possible Points	Points scored (Louisiana Encore Commission use only)
Universities: have credit and non-credit courses? Community Colleges: have credit and non-credit courses?		5	
Museums, Public Library, Zoos, Gardens		5	
<b>10. Leisure Living</b>	Included or Addressed? Yes or No	Possible Points	Points scored (Louisiana Encore Commission use only)
Socialization: Opportunity to interact with citizens of all ages		5	
<b>11. Recreational Areas and Facilities</b>	Included or Addressed? Yes or No	Possible Points	Points scored (Louisiana Encore Commission use only)
Included, but not limited to: <ul style="list-style-type: none"> <li>• Public parks</li> <li>• Boating</li> <li>• Fishing Facilities</li> <li>• Golf Courses</li> <li>• Tennis Courts</li> <li>• Swimming Pools</li> <li>• Hiking</li> <li>• Walking and Cycling Trails</li> <li>• Fitness Center</li> <li>• Senior and Community Centers</li> </ul>		5	
<b>12. Performing Arts</b>	Included or Addressed? Yes or No	Possible Points	Points scored (Louisiana Encore Commission use only)
Included, but not limited to: <ul style="list-style-type: none"> <li>• Concerts</li> <li>• Theatre</li> <li>• Dance</li> </ul>		5	
<b>13. Festivals and Events</b>	Included or Addressed? Yes or No	Possible Points	Points scored (Louisiana Encore Commission use only)
Schedule of festival and events Volunteer opportunities		5	

<b>14. Sports at all Levels</b>	Included or Addressed? Yes or No	Possible Points	Points scored (Louisiana Encore Commission use only)
Participation, spectator, & volunteer opportunities		5	
<b>15. Military Bases</b>	Included or Addressed? Yes or No	Possible Points	Points scored (Louisiana Encore Commission use only)
Located within 50 miles to the area		5	
<b>16. Additional information</b>	Included or Addressed? Yes or No	Possible Points	Points scored (Louisiana Encore Commission use only)
Costs of electricity and water Availability of Cable/Satellite television Availability of high-speed internet service Pedestrian friendly elements (i.e. sidewalks, curb cuts) Pick up/delivery services from stores/restaurants Affordable cost of living Litter control Bilingual (percentage of people who speak French, Spanish or another language)		5	
<b>A. Community Support</b>	Included or Addressed? Yes or No	Possible Points	Points scored (Louisiana Encore Commission use only)
Evidence of support from local organizations, businesses, and elected officials		20	
<b>B. Marketing Plan</b>	Included or Addressed? Yes or No	Possible Points	Points scored (Louisiana Encore Commission use only)
The mission as applied to being a Louisiana certified retirement community		5	
The target market		5	
The goal(s) of the community		5	
The strategies the community will employ to attain the goals of the program		5	
An outline of plans to correct any facility and service deficiencies identified in the retiree desirability assessment.		5	

# Louisiana Certified Retirement Community Program Application

*(All lines of information in this application are required)*

City Name: \_\_\_\_\_

Parish Name: \_\_\_\_\_

Taxpayer ID Number: \_\_\_\_\_

Full Name of Chief Elected Official: \_\_\_\_\_

Primary Phone Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_

E-mail: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Full Name of the Local Contact Person: \_\_\_\_\_

Title: \_\_\_\_\_

Primary Phone Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_

E-mail: \_\_\_\_\_

Physical Mailing Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

P.O. Box Mailing Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Census Population based on the latest official census: \_\_\_\_\_  
(Exact Population)

**Chief Elected Official Signature**

The applicant, by and through his/her person or agent's signature below certifies that

1. All information provided in connection with this application at any time is true and correct to the best of the applicant's knowledge
2. Acknowledges that any misrepresentation of false statement made by the applicant, or an authorized agent of the applicant in connection with this application, whether intentional or not, will constitute grounds for denial, revocation, or non-renewal of any certification issued pursuant to this application

If signed by an agent (including employee) of the applicant, the person signing certifies that he or she is authorized to make the preceding certification on behalf of the applicant.

**Chief Elected Official Signature:**

**Date (mm/dd/yyyy)**

\_\_\_\_\_

\_\_\_\_\_

**Use this checklist to ensure you are sending the Louisiana Encore Commission all of the required information and documentation –**

\_\_\_\_\_ Signed and dated Encore LA Commission Certified Retired Community Program Application

\_\_\_\_\_ Completed score sheet

\_\_\_\_\_ Completed retiree desirability assessment to include all of the following:

1. Community Overview
2. Tax Structure/Financial
3. Local Housing Availability
4. Safety
5. Employment and Volunteer Opportunities
6. Health Care Services
7. Emergency/ Non-Emergency Medical Services
8. Public Transportation, Major Highways, Airports
9. Continuing Education
10. Leisure Living
11. Recreational Areas and Facilities
12. Performing Arts
13. Festivals and Events
14. Sports at all Levels
15. Military Bases
16. Additional information

\_\_\_\_\_ Letters of support from the community

\_\_\_\_\_ Resolution

\_\_\_\_\_ Marketing Plan

\_\_\_\_\_ Community's Retirement Board/Panel members and the organizations each member represents

\_\_\_\_\_ Additional Information, if applicable



**Submit completed application to:**

Mary Perrault Williams  
Louisiana Encore Commission  
Louisiana Office of Tourism  
1051 N. Third Street  
Room 332  
Baton Rouge, Louisiana 70802

For more information or questions contact the Louisiana Encore Commission office, Mary P. Williams at [mpwilliams@crt.la.gov](mailto:mpwilliams@crt.la.gov) or call 225-342-8207.

**All applications are due by close of business on Friday, December 6, 2019.**

Mary Perrault Williams  
Encore Louisiana Commission Coordinator  
Louisiana Office of Tourism  
1051 N. Third Street  
Baton Rouge, LA 70802  
Phone: 225-342-8207  
Fax: 225-342-1051  
[mpwilliams@crt.la.gov](mailto:mpwilliams@crt.la.gov)

