

# GO TEXAN Certified Retirement Community Program Guidelines



**GO TEXAN.<sup>®</sup>**



**RETIREMENT COMMUNITY**

**Texas Department of Agriculture**

P.O. Box 12847

Austin, Texas 78711

This document is a guide for the GO TEXAN Certified Retirement Community Program (CRC). Rules governing the program are found in the Texas Administrative Code, Title 4, Part 1, Chapter 29 Subchapter C. The goal of the program, as mandated by HB 1982 enacted by the Texas Legislature during the 79<sup>th</sup> Legislative Session, is to promote Texas as the premier retirement destination. All documentation submitted in the application for certification is subject to the Texas Public Information Act. The application and any requests for additional information should be addressed to:

GO TEXAN Certified Retirement Community Program  
Attention: Scott Sroufe  
Texas Department of Agriculture  
P.O. Box 12847  
Austin, Texas 78711

[Scott.Sroufe@TexasAgriculture.gov](mailto:Scott.Sroufe@TexasAgriculture.gov)  
[www.RetireInTexas.org](http://www.RetireInTexas.org)

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# SECTION 1

## Overview of the Program

The GO TEXAN Certified Retirement Community Program (CRC) is a program administered by the Texas Department of Agriculture (TDA) to help Texas communities encourage retirees and potential retirees to make their homes in Texas communities.

The CRC program:

- promotes Texas as the premier retirement destination to retirees and potential retirees both in and outside Texas;
- assists Texas communities in their efforts to market themselves as desirable retirement locations and to develop communities that retirees would find attractive for a retirement lifestyle;
- assists retirement communities and long-term living communities in driving economic development, attracting potential workforce and enriching Texas communities; and,
- encourages tourism to Texas .

An applicant community must be a unit of general local government (a city or county).

The applicant must designate a sponsor (Local Contact Person, Section C on the application form) who will be responsible for working with the department during the application process and will serve as the primary contact for disseminating information to potential retirees through the CRC program if the certification is approved. The sponsor should be part of a recognizable entity within the community (such as a chamber or economic development corporation), have a physical location with regular office hours, and should have the capacity and resources to manage the community's retirement recruitment efforts.

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

**Applicant 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 on Section C on the application form;
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 to retirees, 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. Demonstrate community support from churches, clubs, businesses, media, hospitals and other health care providers, banks, utility providers, nonprofits, elected officials, retirees and other entities;
7. Complete a marketing plan detailing the mission as applied to the community; the target market; the competition; an analysis of the community's strengths, weaknesses, opportunities and threats; and the strategies the community will employ to attain the goals of the program;
8. Complete a long-term plan outlining the steps the community will undertake to maintain its desirability as a destination for retirees, including an outline of plans to correct any facility and service deficiencies identified in the retiree desirability assessment described in this section; and,
9. Upon notification of approval of the application, submit a fee in an amount equal to the greater of: \$5,000 or \$0.25 multiplied by the population of the community, as determined by the most recent census.
10. Do not submit payment with this application. TDA will provide an invoice upon approval.

#### **Application Process**

1. Each applicant must submit a completed application. No changes to the application will be allowed after the application is received, unless they are a result of TDA staff recommendations. Applications are available from TDA. Completed applications should be submitted to:  

Texas Department of Agriculture  
Marketing & International Trade  
P.O. Box 12847  
Austin, Texas 78711
2. TDA staff 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 deficiencies. 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.
3. After the scoring and application process is complete, staff will make a recommendation for approval or denial of the request for certification to the TDA Commissioner or his/her designee. The Commissioner makes the final decision.
4. TDA will notify the applicant of approval or denial of the application within 90 days of the date of the receipt of the completed application.
5. An application that has been withdrawn or declined for any reason may be resubmitted.

## Contents of Application and Binder Preparation

All application information should be in a three-ring binder. The binder should be organized and tabbed as indicated below. An electronic copy of all documents submitted is not required, but may help expedite the application review process. An electronic copy may also be included in the binder.

1. **TAB 1:** Completed and signed application form with completed check list;
2. **TAB 2: Retiree Desirability Assessment.** The 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 that 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. Although additional details or assessment of other areas of the community will not be scored, the community is encouraged to include any information that it feels would be beneficial in its efforts to meet the community's objectives for the program.

Specifically, the assessment, which can include photos, maps, graphs and any other references should cover the following:

### (tabbed A-O)

- A. Community overview - demographics, geography and climate (at a minimum);
  - B. Texas tax structure - state and local;
  - C. Local housing availability, opportunities and cost;
  - D. Personal safety, security and crime statistics;
  - E. Employment and volunteer opportunities;
  - F. Availability of health care services and other services along the continuum of care, including home-based and community-based services, housing for the elderly, assisted living, personal care and nursing care facilities;
  - G. Availability of emergency medical services and the name and location of any hospital within a 75-mile radius of the community;
  - H. Public transportation and major highways;
  - I. Continuing education;
  - J. Leisure living;
  - K. Recreational areas and facilities;
  - L. The performing arts;
  - M. Festivals and events;
  - N. Sports at all levels; and
  - O. Additional information.
3. **TAB 3:** Completed score sheet
  4. **TAB 4:** Letters or evidence of support from area churches, associations, businesses, media, hospitals and other health care providers, banks, utility providers, nonprofits, elected officials, retirees and other entities, as necessary that support your community's participation in the program.
  5. **TAB 5:** A marketing plan detailing:
    - A. the mission as applied to being a Certified Retirement Community;
    - B. the target market;
    - C. the goals of the community
    - D. the strategies/tactics the community will employ to attain the goals of the program.
  6. **TAB 6:** A long-term plan outlining:
    - A. the steps the community will undertake to maintain its desirability as a destination for retirees; and
    - B. 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.

**Additional information**

Other areas of interest (that are not part of the scoring process) may be included with the tabbed sections and may be valuable in creating a retiree community marketing plan. Section "O" has been included in the Retiree Desirability Assessment section (TAB 2) to allow for discussion and inclusion in the application binder. Possible topics include:

- information on financial services and retail businesses;
- costs of electricity and water;
- availability of cable/satellite television;
- availability of high-speed Internet services;
- telework, business development and volunteer opportunities;
- availability of long-term services and supports (both community and residential);
- emergency services such as fire departments and EMS (voluntary or paid staff);
- number of physicians that accept Medicaid and Medicare;
- efforts of local pharmacies to work with Medicare Drug plan and prescription bottles readable by persons with low vision;
- information about the elderly-disabled homestead exemption, Texas policy on Social Security Income (SSI) and other useful tax information;
- facilities certified as accessible by the Texas Department of Licensing and Regulations;
- availability of accessible housing and accessible housing features;
- local ordinances for the protection of people with disabilities;
- pedestrian friendly elements such as, sidewalks, curb cuts, audible pedestrian signals, etc.;
- local business efforts to make reasonable accommodations for people with disabilities; and,
- accessible parks and trails and accessible golf courses and swimming pools for persons with disabilities.

**Resources for Assessment**

There are many resources to assist the applicant with completing the assessment. Helpful links include:

- Aging Texas Well: [www.agingtexaswell.org](http://www.agingtexaswell.org)
- US Census quick facts: <http://quickfacts.census.gov/qfd/states/48000.html>
- County Narratives: <http://socrates.cdr.state.tx.us/CNP/index.asp>
- Councils of Governments: [www.txregionalcouncil.org/](http://www.txregionalcouncil.org/)
- Governor's Committee on People with Disabilities: [www.governor.state.tx.us/disabilities/](http://www.governor.state.tx.us/disabilities/)
- Texas Department of Rural Affairs: [www.orca.state.tx.us/](http://www.orca.state.tx.us/)
- Texas Department of Aging and Disability Services (DADS): [www.dads.state.tx.us/](http://www.dads.state.tx.us/)
- Melissadata Crime Index:  
[www.melissadata.com/lookups/CrimeCity.asp?State=TX48Texas&CrimeYear=2008&submit1=Submit](http://www.melissadata.com/lookups/CrimeCity.asp?State=TX48Texas&CrimeYear=2008&submit1=Submit)
- City-Data.com: [www.city-data.com/](http://www.city-data.com/)

## SECTION 3

### Information to know if an application is approved

#### **Invoice**

You will receive an invoice upon approval. Do not send payment with application.

#### **Assistance to Certified Communities**

Once a community is certified, TDA shall provide the following assistance to communities:

- Marketing – oversight and guidance in promoting the community as a great place to retire through assistance with the development of advertisements, promotion through social media and in press releases;
- Advertising and/or promotion via social and earned media;
- Visibility – communities will be listed on TDA's website;
- Visits – TDA staff may schedule visits to community to measure the effectiveness and satisfaction of the community with the local and state programs.

#### **Use of "GO TEXAN Certified Retirement Community" or other Department Marks**

Certification under this program shall allow the approved community to use the program mark as well as any marks created by TDA to certify that the community is indeed part of the GO TEXAN Marketing Program and to promote the community to retirees, potential retirees and to any other interested parties upon the execution of a licensing agreement with TDA.

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

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

To be considered for recertification by TDA, an 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; and
- submit a new certification fee as outlined in program rules.



# SECTION 4

## Application packet

All fields on the 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 behind the checklist, in accordance with the guidelines, Section 2, Application Preparation Information.

**Scoring Criteria** - The following is a list of the selection criteria used by TDA when reviewing CRC applications. Applicants are scored on four sections, as follows. There are a total of 185 possible points.

Retiree Desirability Assessment	120 points
Community Support	20 points
Marketing Plan	25 points
Long-Term Plan	20 points

**Small Communities:** Cities with less than 10,000 in population (per most recent Census) and counties with less than 25,000 must have at least 130 points to be certified as a GO TEXAN Certified Retirement Community.

**Mid-sized Communities:** Cities with a population from 10,001 to 50,000 (per most recent Census) and counties from 25,001 to 200,000 must have at least 150 points to be certified as a GO TEXAN Certified Retirement Community.

**Large Communities:** Cities with greater than 50,000 in population and counties with greater than 200,000 (per most recent Census) must have at least 170 points to be certified as a GO TEXAN Certified 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.**

**Payment** - Do not send payment with the application packet. Upon approval TDA will invoice you.

## Detailed Assessment Information

Respond on a separate sheet to items A-O that apply to your community

### (A) Community Overview - Demographics, Geography and Climate

Does the assessment include information on the community's demographics, geography and climate?

### (B) Texas Tax Structure – State and local

Does the assessment address the state and local tax structure including, at a minimum, the local property tax rates and local sales tax rates? Does the city (if the applicant is a city) limit the city tax on homesteads for residents 65 years of age or older, as authorized by Section 1-b(h), Article III, Texas Constitution? If the applicant is a county, mark "N/A." Does the county limit the county tax on homesteads for residents 65 years of age or older, as authorized by Section 1-b(h), Article III, Texas Constitution?

### (C) Local Housing Availability, Opportunity and Cost

Does the assessment address the local housing market, including, at a minimum, information on:

- Resale and rental properties including single-family and multi-family options in a variety of price ranges.
- Resale and rental properties designed and equipped to meet the needs of individuals who are disabled or mobility impaired.
- Inventories that are convenient to public transportation services.

### (D) Personal Safety, Security and Crime Statistics

Does the assessment address public safety and crime index?

Score 5 additional points if the crime index is at or below the state average for the most recent year available.  
Score an additional 5 points if the crime index is at or below 80% of the state average.

### (E) Employment Opportunities

Does the assessment address local employment opportunities for retirees, including, at a minimum, information on full-time jobs, part-time jobs and business opportunities available in a variety of trade, professions and services.

### (F) Health Services

Does the assessment address healthcare availability for retirees, including information on hospitals, physician services, pharmacy services and long-term care options?

### (G) Emergency Medical Services

Does the assessment address emergency services for retirees?

### (H) Public Transportation and Major Highways

Does the assessment address transportation for retirees, including information on major highways, public transportation systems including air, rail, taxi and scheduled bus services?

### (I) Continuing Education

Does the assessment address educational opportunities available to retirees, including information on:

- Museums;
- Colleges or universities;
- Lifetime learning programs
- Zoos and zoological or botanical gardens;
- Concerts;
- Theatre; and
- Dance

### (J) Leisure Living

Does the assessment address the leisure living in the local area, including the opportunity to interact with citizens of all ages?

## Detailed Assessment Information - Continued

### **(K) Recreational Areas and Facilities**

Does the assessment include information regarding local recreational activities as they might be desirable by retirees including, but not limited to:

- Public parks
- Boating and sport fishing facilities
- Public and private golf courses
- Public and private tennis courts
- Public walking, hiking and cycling trails
- Fitness centers
- Senior and/or community centers

### **(L) Performing Arts**

Does the assessment include information regarding local opportunities to view and/or participate in cultural opportunities, including, but not limited to:

- Concerts
- Theatre
- Dance

### **(M) Festivals and Events**

Does the assessment address festivals and events in the local area, including any opportunities to serve as a volunteer for the events?

### **(N) Sports at all levels**

Does the assessment address sporting opportunities and events in the local area, including any opportunities for both watching and participating?

### **(O) Additional Information**

**COMMUNITY NAME:** \_\_\_\_\_

**SCORE SHEET**

<b>(A) Community Overview – Demographics, Geography and Climate</b>	Included or addressed?	Possible points	Points scored (TDA use only)
Does the assessment include information on the community's demographics, geography and climate?		5	
<b>(B) Texas Tax Structure – State and local</b>	Included or addressed?	Possible points	Points scored (TDA use only)
Does the assessment address the state and local tax structure including, at a minimum, the local property tax rates and local sales tax rates?		5	
Does the city (if the applicant is a city) limit the city tax on homesteads for residents 65 years of age or older, as authorized by Section 1-b(h), Article III, Texas Constitution? If the applicant is a county, mark "N/A."		5	
Does the county limit the county tax on homesteads for residents 65 years of age or older, as authorized by Section 1-b(h), Article III, Texas Constitution?		5	
<b>(C) Local Housing Availability, Opportunity and Cost</b>	Included or addressed?	Possible points	Points scored (TDA use only)
<p>Does the assessment address the local housing market, including, at a minimum, information on:</p> <ul style="list-style-type: none"> <li>• Resale and rental properties including single-family and multi-family options in a variety of price ranges.</li> <li>• Resale and rental properties designed and equipped to meet the needs of individuals who are disabled or mobility impaired.</li> <li>• Inventories that are convenient to public transportation services.</li> </ul>		5	
<b>(D) Personal Safety, Security and Crime Statistics</b>			
<p>Recommended source is:  <a href="http://www.melissadata.com/lookups/CrimeCity.asp?State=TX48Texas&amp;CrimeYear=2008&amp;submit1=Submit">http://www.melissadata.com/lookups/CrimeCity.asp?State=TX48Texas&amp;CrimeYear=2008&amp;submit1=Submit</a>. If you are unable to locate the crime information for the applicant city or county, please use and site the specific source utilized.</p>	Included or addressed?	Possible points	Points scored (TDA use only)
Does the assessment address public safety and crime index?		5	
Score 5 additional points if the crime index is at or below the state average for the most recent year available.		5	
Score an additional 5 points if the crime index is at or below 80% of the state average.		5	
<b>(E) Employment Opportunities</b>	Included or addressed?	Possible points	Points scored (TDA use only)
Does the assessment address local employment opportunities for retirees, including, at a minimum, information on full-time jobs, part-time jobs, and business opportunities available in a variety of trade, professions, and services.		5	

**COMMUNITY NAME:** \_\_\_\_\_

**SCORE SHEET - Continued**

<b>(F) Health Services</b>	Included or addressed?	Possible points	Points scored (TDA use only)
Does the assessment address healthcare availability for retirees, including information on hospitals, physician services, pharmacy services and long-term care options?		5	
Score 5 additional points if the applicant has one or more fully licensed and accredited acute care general hospitals within 60 minutes driving time of any address within the community.		5	
Score 5 additional points if the applicant's county ratio of total persons to each physician is lower than the state average. Use the following website to obtain this information: <i>http://socrates.cdr.state.tx.us/CNP/index.asp</i>		5	
Score 5 additional points if the applicant's county ratio of total persons to each pharmacy is lower than the state average. Use the following website to obtain this information: <i>http://socrates.cdr.state.tx.us/CNP/index.asp</i>		5	
<b>(G) Emergency Medical Services</b>	Included or addressed?	Possible points	Points scored (TDA use only)
Does the assessment address emergency services for retirees?		5	
Score 5 additional points if the applicant community has 24-hour paid professional emergency medical service that is fully certified and staffed with qualified personnel.		5	
<b>(H) Public Transportation and Major Highways</b>	Included or addressed?	Possible points	Points scored (TDA use only)
Does the assessment address transportation for retirees, including information on major highways, public transportation systems including air, rail, taxi and scheduled bus services?		5	
<b>(I) Continuing Education</b>	Included or addressed?	Possible points	Points scored (TDA use only)
Does the assessment address educational opportunities available to retirees, including information on: <ul style="list-style-type: none"> <li>• Museums;</li> <li>• Colleges or Universities;</li> <li>• Lifetime learning programs</li> <li>• Zoos and zoological or botanical gardens;</li> <li>• Concerts;</li> <li>• Theatre; and</li> <li>• Dance</li> </ul>		5	
Score 5 additional points if the applicant has a community college or other institution of higher education that offers non-credit classes that would interest retirees.		5	
Score 5 additional points if the applicant has a public library that is open at least 30 hours per week and has public computers with Internet access.		5	

**COMMUNITY NAME:** \_\_\_\_\_

**SCORE SHEET - Continued**

<b>(J) Leisure Living</b>	Included or addressed?	Possible points	Points scored (TDA use only)
Does the assessment address the leisure living in the local area, including the opportunity to interact with citizens of all ages?		5	
<b>(K) Recreational Areas and Facilities</b>	Included or addressed?	Possible points	Points scored (TDA use only)
Does the Assessment include information regarding local recreational activities as they might be desirable by retirees including, but not limited to: <ul style="list-style-type: none"> <li>• Public parks</li> <li>• Boating and sport fishing facilities</li> <li>• Public and private golf courses</li> <li>• Public and private tennis courts</li> <li>• Public walking, hiking and cycling trails</li> <li>• Fitness centers</li> <li>• Senior and/or community centers</li> </ul>		5	
<b>(L) Performing Arts</b>	Included or addressed?	Possible points	Points scored (TDA use only)
Does the assessment include information regarding local opportunities to view and/or participate in cultural opportunities, including, but not limited to: <ul style="list-style-type: none"> <li>• Concerts</li> <li>• Theatre</li> <li>• Dance</li> </ul>		5	
<b>(M) Festivals and Events</b>	Included or addressed?	Possible points	Points scored (TDA use only)
Does the assessment address festivals and events in the local area, including any opportunities to serve as a volunteer for the events?		5	
<b>(N) Sports at all levels</b>	Included or addressed?	Possible points	Points scored (TDA use only)
Does the assessment address sporting opportunities and events in the local area, including any opportunities for both watching and participating?		5	
<b>Community Support</b>	Included or addressed?	Possible points	Points scored (TDA use only)
Evidence or support from area churches, clubs, businesses, media and other entities, as necessary for the success of the program in the community. Score one point for each letter from a uniquely different entity, up to a maximum of 20.		20	

**COMMUNITY NAME:** \_\_\_\_\_

**SCORE SHEET - Continued**

<b>Marketing Plan</b>	Included or addressed?	Possible points	Points scored (TDA use only)	
<p>A marketing plan detailing:</p> <ul style="list-style-type: none"> <li>the mission as applied to the community,</li> <li>the target market,</li> <li>the competition,</li> <li>an analysis of the community's strengths, weaknesses, opportunities and dangers, and</li> <li>the strategies the community will employ to attain the goals of the program.</li> </ul> <p>Score up to 5 points for each section addressed in the inclusion of the marketing plan.</p>		<i>Total: 25</i>		
		5		
		5		
		5		
		5		
		5		
<b>Long-Term Plan</b>	Included or addressed?	Possible points	Points scored (TDA use only)	
<p>A long-term plan outlining:</p> <ul style="list-style-type: none"> <li>the steps the community will undertake to maintain its desirability as a destination for retirees, and</li> <li>an outline of plans to correct any facility and service deficiencies identified in the retiree desirability assessment.</li> </ul> <p>Score up to 10 points for each section addressed in the inclusion of the long-term plan.</p>		<i>Total: 20</i>		
		10		
		10		