

**The Implementation
Plan to Attract Retirees and
Future Retirees to the
Paso del Norte Region**



Overview of the Implementation Plan

Parts of the Plan

The implementation plan has seven parts:

1. Measurable Objectives
2. Keys to Success
3. Committees
4. Marketing Plan
5. Prospect Package
6. The Paso del Norte Region Personal Touch Follow-Up Program
7. Travel Writer Program

Objectives of the Implementation Plan – 2008 to 2011

Objective 1. The program will be funded.

Objective 2. The Director will be employed within three months.

Objective 3. The program will be ready to launch within 12 months (by the Christmas Sun Bowl season of 2008).

- ❑ Partnerships are formed with:
 - UTEP Alumni Association
 - Ft. Bliss
 - Local Realtors
 - Local Hotel/Motel Association, Local Restaurant Association
- ❑ Production of new improved walking and driving tours
- ❑ Web-site
- ❑ Marketing
- ❑ Volunteer system
- ❑ Just/Been Club (Just arrived/Been here a while)
- ❑ Tracking program in place
- ❑ Hire part-time Director of Volunteers
- ❑ Identify "friendly" travel writers and initiate Familiarization (FAM) tour for targeted travel writers

The total of 575 retiree households will have the economic equivalent of 1,782 manufacturing jobs, and at a minimum should bring a minimum of \$28,750,000 transfer income to the area based on an average household income of \$50,000.

Objective 4. By the third year 50 percent of the leads will be earned through referrals.

Objective 5. By the end of 2011 575 households will have moved to the Paso del Norte region as a direct result of the retiree attraction program. A minimum of 75 households will move to the Paso del Norte region by the end of year two (2009), an additional 100 households will move in 2010, and 400 households will move to the Paso del Norte region in 2011.

Number of Visitors, Number and Percent Interested in Retirement Move, and Number and Percent Captured										
Year	Number of Visitors	Percent Interest	Number Interest	Percent Captured	Number Captured	Percent Referrals	Number Referrals	Percent Capture	Number Captured	Total
2008	Program in Development									
2009	30,000	5%	1,500	5%	75					75
2010	40,000	5%	2,000	5%	100					100
2011	40,000	10%	4,000	5%	200	50%	2,000	10%	200	400

Keys to Success

There is nothing prohibiting the Paso del Norte region from becoming a retirement destination. On the contrary, there are many reasons why this area should be successful. The success will be dependent, however, on funding and implementation of the plan, reliability, follow-through, commitment and perseverance.

1. **Identify and Constantly Monitor the Markets.** The market(s), both the markets to target initially and the markets to target in a second phase of effort have been defined. These definitions and characteristics of markets should be monitored constantly to ensure that the marketing messages and platforms appeal to the prospects most likely to move to the area.
2. **Funding for the Program.** The program should be funded, generously. A shoestring budget will not have an impact and will not initiate the retirement migration stream that is desired. The Paso del Norte region is behind much of the rest of Texas and the southwestern region in its retirement attraction development, but by doing it right and focusing on the market sectors most likely to move to the area the initial streams can be developed. As we have seen with other areas that have become retiree magnets, little streams can almost become floods once they get started.
3. **Get the Area Ready for the Retiree Business.** The Paso del Norte region must get the product ready to be sold. The region has much to be offer, but the manner in which is offered must be done carefully so that the visitor(s) to the Paso del Norte region will have a successful interaction with the community. El Pasoans are friendly and the community has many attractions. Care must be taken to highlight the attractions at the appropriate times so that visitors will find the attractions open and have a positive experience.
4. **Marshall the Talents of Volunteers.** Establish an active volunteer committee to meet and greet prospects. These people are critical to the success of the program and should be friendly, outgoing, interested in meeting people and having fun. Make responses by the volunteers to inquiries by prospective visitors personal, repetitive, fun and uniquely of the Paso del Norte region. The prospects should leave with the opinion that they have never encountered a community that is friendlier or more open.
 - A volunteer who knows the region well, should follow-up with each inquiry, personally.
 - Volunteers should offer to meet with prospects interested in the area for coffee, a drink, a quick get together; invite the prospect to a "Just/Been event" if one will be underway while the visitor is in town; and
 - Volunteers should maintain the contact with the prospect once they have returned to their homes.
 - A small remembrance token can be mailed;
 - A photograph of their visit can be emailed; and,
 - A phone call to tell them how much their visit was enjoyed.
 - Create a unique name for the volunteers that speaks of the region's history – Conquistadores', rustlers, wranglers, marshals, or something else that is distinctively different.

Keys to Success - 2

5. **Market the Region with Messages that Resonate with the Target Market(s).** The Paso del Norte region, once the products are prepared and defined, must be marketed well and in a manner consistent with the lifestyle preferences of the target market sectors. The market sectors will differ. Marketing messages and images must be consistent with who they are and what they want. A military retiree may look for something different than the UTEP graduate, and the retiree without a specific affinity group in the region may be looking for an entirely different experience.
6. **Start With and Maintain Strong Tracking Programs.** Managing and tracking leads, visits, and sales will be critical. Information and feedback on the marketing messages, events, and their successes (or lack thereof) will be critical to ensure resources are used well and planning will be based on results.
7. **Your Core of Volunteers are Your Most Important Asset.** Establish a "Just/Been" club for those who have "Just Arrived" and those who have "Been Here" awhile that your volunteer staff, look forward to and enjoy. Newcomers are automatically members. The purpose of the club is to provide newcomers with an instant group of friends and plenty of places where they will be welcomed. The club gets the newcomers "worked" into the community as quickly as possible. The club needs to create opportunities for new people to get together with each other and with old-timers. The club should run itself, but it needs to be in place early, rather than later.
 - The club must create a new, neutral platform for long-time residents and newcomers to get together. The club is not political, cliquish or exclusionary. The primary goals of the club are to welcome everyone, help stimulate relationships and friendships, and to connect people of similar interests.
 - The club sponsors traditional fun (and crazy) events for newcomers and old-timers (depending on the tastes and lifestyles of the various groups within the club.
 - The club needs to be fluid and try to pair people who have similar attitudes and outlooks.
 - The club should prepare a simple newsletter (sent to prospects as well as club members) of the club events.
 - New club members become part of the retiree attraction volunteers so that they can smooth the transition for new people and show them the ropes.
 - The right chemistry in the club, and sub-group within the club will be an amazing asset to the attraction program and to lifelong residents as well as the newcomers.

Keys to Success - 3

- 8. Clean Up and Spruce Up El Paso.** El Paso's appearance and reputation need work. To be blunt: El Paso has few streetscapes that are attractive, many areas are ill-kempt and dirty, there are few parks and green spaces in neighborhoods, and many areas look tattered, plastic and neon. As an example, this ill-kempt appearance is evident in the areas immediately adjacent to the UTEP campus. Even though there is a small area of restaurants that are somewhat trendy looking, the area around this small enclave almost completely masks the nicer appearance.

El Paso needs to invest in its streetscapes, and prepare and enforce reasonable ordinances. Some places establish "Tool Libraries" that loan the necessary implements for people to be able to keep their yards and lawns intact.

Civic clubs should be asked to adopt areas of the community to create streetscapes, add landscaping (desert landscaping is fine), and to maintain the areas. Perhaps a community wide contest among and between civic clubs, neighborhoods and businesses could be initiated to pick up, fix up and spruce up their defined areas.

Perhaps a grant program can be established to assist neighborhoods create attractive streetscapes.

Five Critical Steps

- 1. Establish Committees.** The Paso del Norte region should develop a general Retiree Attraction Committee with a minimum of four subcommittees: community relations/ fundraising, marketing/promotion, ambassadors, and program evaluation.
- 2. Write a Marketing Plan.** The purpose of this plan is to detail the communications needed to successfully implement a program, focusing on the types of retirees the Paso del Norte region desires and how you expect to achieve its goals. You will want to augment and refine the ideas in this document.
- 3. Create the Paso del Norte Region Touch** – the system and personnel to ensure that contacts with the Paso del Norte region that will ensure that the prospect sees the best of the Paso del Norte region and meets people who represent the spirit of the Paso del Norte region.
- 4. Create a Prospect Package.** Prepare the packaging of the Paso del Norte region to ensure successful encounters so that the positive aspects of the Paso del Norte lifestyle is reinforced.
- 5. Follow-up and Fun Follow-Up.** Ensure the program is relentless in consistency of contacts with prospects. Volunteers must send relevant information to prospective retirees in a timely manner and maintain contact through regular and systematic fun follow-up.



Establish Committees

Retiree Attraction Committee

The Retiree Attraction Committee is the primary committee that plans and oversees the work of the sub-committees.

- 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 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.

Retiree Attraction Committee

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

The 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 Paso del Norte region.
- 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 and raise funds for the program.
- 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

The Community Relations/Fundraising Subcommittee

Members of this subcommittee should be knowledgeable on the following three key points:

- (1) The mission of the retirement attraction committee;
- (2) How the Paso del Norte region can become involved in the overall retiree attraction program; and,
- (3) The economic and civic advantages of having retirees move into the Paso del Norte region.

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. 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
- Health care provider’s establishments
- Public and private clubs
- Insurance companies
- Restaurants
- Real estate companies
- Utility companies

Primary beneficiaries such as these should prove helpful in raising funds needed to promote the Paso del Norte region 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 the Paso del Norte region.

Ambassador Sub-Committee

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 Paso del Norte region.

The level of involvement displayed by the Ambassadors will ultimately determine the success of the program. Ideal ambassadors are retirees who have relocated to the Paso del Norte region in the past five years. Because of this, they often have interesting stories to tell prospects regarding their move to the Paso del Norte region. The most successful ambassadors are retired couples who tour other married couples.

The duties of the Ambassador include the following:

- Respond to inquiries by mail and telephone
- Maintain a log of all contacts made
- Provide tours of the Paso del Norte region to visiting prospects
- Invite prospects to special 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)
- Actively participate in the Just/Been Committee

Program Evaluation Sub-Committee

The Program Evaluation Subcommittee should be comprised of representatives from the other four subcommittees. The 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
- ❑ Track the in-migration patterns of retirees who have already settled in the Paso del Norte region. By discovering where these new residents have migrated from, the program can determine effective avenues for the advertising message and promotional efforts.
- ❑ Develop and use a simple survey to track the participants reactions and perceptions of their experiences in the Paso del Norte region.

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 is the establishment of a system to track retirees to the Paso del Norte region 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 ambassadors as part of the effort to continue retiree attraction.



Market the Paso del Norte Region

Marketing the Paso del Norte Region

Product

The product is the Paso del Norte region as a place to live. The product consists of housing in an active adult community development or in a traditional neighborhood and the lifestyle. A slightly greater proportion will prefer to live in an all-age neighborhood as opposed to an active adult community.

Price

The price is the total value proposition of living in the Paso del Norte region. It is the cost of housing, cost of living, cost of traveling to and from their existing location (and/or children), cost of moving; and the cost or benefit of losing or gaining new friends and an exciting and vibrant lifestyle.

Promotion

The promotional strategy will need to explicitly depict both the product and value of the Paso del Norte region. A significant part of the value of the Paso del Norte region will be the people, culture and fun that make this region what it is.

Place

This is the distribution system that gets the buyer with the product in a mood to buy. The promotional materials will need to help bring the prospect to the Paso del Norte region and to the thought – “I could live in this wonderful place among these wonderful people.”

Marketing/Promotion Sub-Committee

Getting Their Attention

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 image to those markets
- Develop and distribute promotional material
- Coordinate advertising and public relations campaigns with other entities such as the Convention and Visitors Bureau, Ft. Bliss, UTEP, and businesses – particularly those related to tourism, entertainment, banking, real estate, restaurants, etc.

Key Marketing Ideas

UTEP

- Partner with the UTEP Alumni Association
- Send mailings to the classes that graduated before 1970
- Become a Gold or Silver Sponsor of UTEP Homecoming
- Co-host functions with the UTEP Alumni Association during homecoming
- Be sure the Just/Been club newsletters (on-line) get to members of the UTEP Alumni Association
- Invite parents of out of town freshmen to a reception in their honor to meet Ambassadors

Ft. Bliss

- Partner with the Ft. Bliss office that handles retirees
- Advertise in the *Ft. Bliss Monitor*
- Write editorials for the *Ft. Bliss Monitor*
- Offer to write a weekly or monthly column for *Ft. Bliss Monitor* about living (retiring) in the Paso del Norte region
- Advertise coming home to El Paso

Create unique campaign slogan just for UTEP and Ft. Bliss retirees that conveys Come Back Home to the Paso del Norte region.

Create Tours (that will guarantee the tourists will have a successful experience)

- Knowledgeable locals must plan and define routes and stops with points of interest (these routes must begin and end at the same place)
- Knowledgeable locals must research the area, solicit participation with local attractions, businesses, museums, etc., and monitor the participation and experiences of visitors to the points of interest stops on the routes
- Knowledgeable locals who can write should assist with creating brochures (print and on-line) defining when and where to go, what to do, what not to miss, etc.
- Knowledgeable locals should be identified and taught to conduct tours of the area. Tours should be available on a schedule, and available on-demand, if a guide is available.

Key Marking Ideas - 2

Travel and Leisure Writers

- Find an angle about El Paso that will be new and fresh. Entice writers with elements of El Paso they can't see somewhere else. Don't try to make El Paso like every other retirement destination. Find the aspects of El Paso that you have and the other areas don't
- Locate area travel and leisure writers
- Locate regional travel and leisure writers
- Send them a teaser when you have found your fresh angle

Travel and Trade Shows

The Retiree Attraction Committee could work travel and trade shows to promote the Paso del Norte region as a retirement destination and to provide the program a learning and information gathering experience, gaining first-hand knowledge of what retirees are seeking in a retirement destination. This could best be accomplished by having the program director attend these shows with possible assistance from selected members of the Marketing/Promotion Subcommittee as well as the Ambassadors Subcommittee.

Create Fact Sheet

- How far will your dollar go in the Paso del Norte region?
- Compare the Paso del Norte region with like-size cities: housing, utilities, groceries, health care, entertainment, restaurants, etc.
- How safe will you be?
- What annual activities, facilities do you have (be realistic!) that will bring people to the Paso del Norte region.

Answering and Fulfilling Requests

- Knowledgeable local people to answer the phone and give concise, accurate answers to questions
- People to fulfill mailed or e-mailed requests
- The key here is promptness, accuracy, and honesty

Marketing the Paso del Norte Region to Retirees

The initial promotional message can be sent effectively to the target audience through the following:

- Print media. Utilize both magazines and newspapers for advertising and publicity.
- Brochures. Promote the Paso del Norte region as a retirement destination with brochures to be placed in state and local tourist attractions, state welcome centers, and local visitors' centers.
- Travel and trade shows. These shows are not only excellent ways to promote the local program, but they provide opportunities to meet with retirees and gain further understanding of what they seek.
- Direct mail. Examples include newsletters, invitations to special events, special letters to local high school and college graduates.
- Promotional video/DVD. This would highlight the Paso del Norte region, be placed in libraries throughout the target market area, and be available through special order.
- Internet. Develop an Internet web site to promote the area.
- Broadcast media. Create radio and television advertising, particularly cable television, and publicity.
- Welcome center kiosks. Supply welcome centers with materials for their kiosks.
- Billboards. Develop an outdoor advertising campaign.

Each of these methods has advantages and disadvantages in cost, penetration, and exposure frequency of the message. Each must be carefully weighed within the context of the overall promotional budget. Two of these areas, print media and brochures, are discussed on the next pages.