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Village of Pinehurst

Memo

To: Village Council

From: Brooke Hunter

CC: Jeff Sanborn & Doug Willardson

Date: July 26, 2022

Re: Budget amendment re-appropriating funds to complete projects from FY 2022

As you are aware, the Village had several projects underway at June 30, 2022 that need to be carried over to the next fiscal year. Per NCGS, the appropriations for these projects lapse at the close of the fiscal year and the funds are added to the Village's fund balance. In order for these projects to be completed, funds must be reappropriated in the current fiscal year. The attached ordinance is the budget amendment required to amend the FY 2023 General Fund Budget for these projects, as these amounts were not included in the original budget adopted by Council on June 14, 2022.

I have included a summary below that indicates which projects are included in the budget ordinance:

Administration	Village Hall office expansion	$ 6,883
Administration	Village Hall office expansion furniture	14,000
Administration	Village Hall generator replacement	8,300
Administration	Assembly Hall amp and A/V system card replacement	4,974
Administration	Neighborhood Quality of Life survey completion	5,000
Human Resources	Employee handbook review and digital conversion	3,500
Police	Unspent restricted funds	2,713
Police	Unspent newly donated funds	4,000
Police	Controlled substance taxes	4,920
Police	Unspent equitable sharing funds	25,817
Police	Unspent newly received equitable sharing funds	10,480
Police	Ammunition – delivery delayed	5,128
Police	Mobile radio replacement – delivery delayed	3,873
Police	Citizen engagement and officer wellness/health software	5,000
Fire	Fire truck topper and slide out unit	9,500
Fire	New hydrant installation – delayed installation	3,616
Fire	Turnout gear – delivery delayed	17,955
Fire	Uniforms – delivery delayed	3,696
Fire	Canopy tent for public events	2,559
Fire	Emergency Operations Plan contract completion	10,000
Fire	Fire station storage building	283,250
Fire	Unspent restricted funds	1,351
Fire	Unspent newly donated funds	2,350
Inspections	Truck replacement – delivery delayed	25,000
Public Services Admin.	Stormwater master plan contract	84,520
Streets & Grounds	Install parking sign posts downtown	11,800
Streets & Grounds	Memorial flag donations	220
Streets & Grounds	Truck replacement – delivery delayed	32,000
Streets & Grounds	Sidewalk design and construction	245,000
Solid Waste	Yard debris carts - delivery delayed	13,762
Solid Waste	Garbage truck replacement - delivery delayed	220,000
Recreation	Parks & Recreation comprehensive master plan	45,000

Recreation	Unspent donated funds-Rec	$ 560
Recreation	Unspent donated funds-GWH	9,146
Harness Track	Land improvements TBD	91,000
Planning	Small Area Plans contract	5,200
Planning	Pinehurst Development Ordinance update	200,000
Planning	Large format scanner	8,000
Information Technology	Phone system upgrade	7,100
Total		$ 1,437,173

The items listed include projects for which funds were donated and were not spent in the previous year. These include the Police, Fire, Streets & Grounds, Recreation, and Greenway Wildlife Habitat donations. Police controlled substance taxes and Police equitable sharing funds also carry use restrictions.

The other items listed are projects funded in the previous fiscal year that were not started and/or completed by June 30. Described below are the more significant items included in the reappropriation amendment this year. Supply chain and manufacturing delays have been common issues across many departments this year.

In Administration, funding to complete the Village Hall office expansion project and purchase furniture for the space is being carried over. Most of the construction was complete by June 30 with one small phase of the project remaining. New office furniture was ordered in FY 2022, but did not arrive until July.

In Fire, funding related to the Fire Station storage building that is under contract must be reappropriated. Design is complete, and construction is expected to begin in September with completion anticipated by the end of the calendar year. The Fire Department has also requested to carry over funds for turnout gear that was ordered in February, but not received by June 30 due to supply chain delays.

Despite placing vehicle orders in early FY 2022, the Village has not received three trucks due to manufacturing delays. These include a replacement Inspections truck, Streets & Grounds truck, and Solid Waste garbage truck. Funding is requested to be rolled forward for these vehicles.

In Public Services Administration, funding to complete the stormwater master plan is requested to be carried over. This process is currently underway with expected completion of phase 1 in the first quarter of FY 2023.

In Streets & Grounds, funding to complete the design and construction of the Pine Vista and McKenzie Road sidewalks is being carried over. Design is underway for these walkways, and construction is expected to go out to bid near the end of the first quarter.

In Recreation, funding for the development of the Parks & Recreation comprehensive master plan is requested to be carried over. The contract for the plan will be presented for Council's review during the August meeting.

At the Harness Track, funding for land improvement projects is requested to be carried over to address various improvements at the facility. Staff performed a review of the facility and identified specific projects that will address stormwater, paddock fencing, and structural related issues. These projects are being prioritized and evaluated.

Lastly, in Planning, funds for the update to the Pinehurst Development Ordinance are being reappropriated. Staff is developing the Request for Qualifications for the project.

Thank you for your consideration of these items. Should you have any questions, please do not hesitate to contact me.

Council Member to Report	Partners & Collaborators
John Strickland	Convention and Visitors Bureau
	FirstHealth
	*Moore County, NC - Rotating
	Moore County Transportation Committee
	NCDOT/TARPO
	*Neighborhood Advisory Committee - Rotating
	*North Carolina - Rotating
	Partners in Progress
	Pinehurst Resort
Patrick Pizzella	*Moore County, NC - Rotating
	NCDOT/TARPO
	*Neighborhood Advisory Committee - Rotating
	*North Carolina - Rotating
	Partners in Progress
	Tri-Cities Work Group (Pinehurst, So. Pines, Aberdeen)
Jane Hogeman	Beautification Committee
	Chamber of Commerce
	*Moore County, NC - Rotating
	*Neighborhood Advisory Committee - Rotating
	*North Carolina - Rotating
	Pinehurst Business Partners
	Tri-Cities Work Group (Pinehurst, So. Pines, Aberdeen)
Lydia Boesch	Bicycle and Pedestrian Advisory Committee
	Convention and Visitors Bureau
	*Moore County, NC - Rotating
	*Neighborhood Advisory Committee - Rotating
	*North Carolina - Rotating
Jeff Morgan	FirstHealth
	*Moore County, NC - Rotating
	Moore County Schools
	*Neighborhood Advisory Committee - Rotating
	*North Carolina - Rotating
	Triangle J. COG

ORDINANCE #22-10:

AN ORDINANCE AMENDING THE ORDINANCE APPROPRIATING FUNDS FOR OPERATIONS OF THE VILLAGE OF PINEHURST FOR FISCAL YEAR 2023, REGARDING REVENUES AND EXPENDITURES OF THE GENERAL FUND (RE-APPROPRIATE FY 2022 FUNDS IN FY 2023).

THAT WHEREAS, funds that were restricted to specific uses were received by the Village in the fiscal year ending June 30, 2022 that were not expended but are expected to be expended in the fiscal year ending June 30, 2023 including Police donations, Fire donations, Streets & Grounds donations, Recreation donations, greenway wildlife habitat donations, Police controlled substance taxes, and Police equitable sharing funds; and

WHEREAS, the Village budgeted for expenditures in the fiscal year ending June 30, 2022 for various other projects that were not incurred, but are expected to be incurred in the fiscal year ending June 30, 2023; and

WHEREAS, the Village did not appropriate these funds in the original budget adopted for the year ended June 30, 2023;

NOW, THEREFORE, BE IT RESOLVED by the Village Council of the Village of Pinehurst, North Carolina, in the regular meeting assembled this 9th day of August 2022, as follows:

SECTION 1. To amend the General Fund with regard to revenues and expenditures, the revenue and expenditure accounts are to be changed as follows:

Account No.	Account Name	Debit	Credit
10-00-220-7220	Capital Outlay: B&G Buildings	$ 6,883	
10-00-970-3560	Charges to Other Departments		$ 6,883
10-00-970-7200	Capital Outlay: Buildings	6,883	
10-00-220-7420	Capital Outlay: B&G Equipment	8,300	
10-00-970-3560	Charges to Other Departments		8,300
10-00-970-7400	Capital Outlay: Equipment	8,300	
10-00-220-5911	IT Charges	4,974	
10-00-980-3560	Charges to Other Departments		4,974
10-00-980-5400	Departmental Supplies	4,974	
10-00-220-5300	Contracted Services	5,000	
10-00-220-5400	Departmental Supplies	14,000	
10-00-240-5300	Contracted Services	3,500	
10-10-310-5402	Departmental Supplies – Restricted	11,633	
10-10-310-6803	Equitable Sharing Expenditures	36,297	
10-10-310-5400	Departmental Supplies	5,128	
10-10-310-5310	Uniforms & Equipment	3,873	
10-10-310-5911	IT Charges	5,000	
10-00-980-3560	Charges to Other Departments		5,000
10-00-980-5901	Repairs & Maintenance: Equipment	5,000	

Account No.	Account Name	Debit	Credit
10-10-320-7510	Capital Outlay: Fleet Vehicles	$ 9,500	
10-10-330-7510	Capital Outlay: Fleet Vehicles	25,000	
10-20-420-7510	Capital Outlay: Fleet Vehicles	32,000	
10-30-510-7510	Capital Outlay: Fleet Vehicles	220,000	
10-00-960-3560	Charges to Other Departments		$ 286,500
10-00-960-7500	Capital Outlay: Vehicles	286,500	
10-10-320-5400	Departmental Supplies	3,616	
10-10-320-5310	Uniforms	21,651	
10-10-320-5050	Public Education	2,559	
10-10-320-5800	Professional Services	10,000	
10-10-320-7200	Capital Outlay: Buildings	283,250	
10-10-320-5402	Departmental Supplies – Restricted	3,701	
10-20-410-5800	Professional Services	84,520	
10-20-420-5300	Contracted Services	11,800	
10-20-420-5400	Departmental Supplies	220	
10-20-420-7700	Infrastructure	245,000	
10-30-510-5400	Departmental Supplies	13,762	
10-80-610-5800	Professional Services	45,000	
10-80-610-6532	Greenways Wildlife Habitat	9,146	
10-80-610-5400	Departmental Supplies	560	
10-80-620-7120	Capital Outlay: B&G Land	91,000	
10-00-970-3560	Charges to Other Departments		91,000
10-00-970-7100	Capital Outlay: Land	91,000	
10-40-710-5800	Professional Services	205,200	
10-40-710-7430	Capital Outlay: IT Equipment	8,000	
10-00-980-3560	Charges to Other Departments		8,000
10-00-980-7400	Capital Outlay: Equipment	8,000	
10-00-980-5400	Departmental Supplies	7,100	
10-00-980-3560	Charges to Other Departments		7,100
10-00-220-5911	IT Charges	1,350	
10-10-310-5911	IT Charges	2,200	
10-10-320-5911	IT Charges	1,700	
10-20-410-5911	IT Charges	570	
10-80-610-5911	IT Charges	570	
10-40-710-5911	IT Charges	710	
10-00-190-3905	Fund Balance Appropriated		426,173
10-00-190-3924	Transfer from ARPA Spec Rev Fund		1,011,000

SECTION 2. Copies of this budget amendment shall be furnished to the Village Clerk, Village Manager and to the Financial Services Director for their direction and implementation.

DRAFT

THIS ORDINANCE passed and adopted this 9th day of August 2022.

VILLAGE OF PINEHURST
VILLAGE COUNCIL

(Municipal Seal)

By: _____
John C. Strickland, Mayor

Attest:

_____
Kelly Chance, Village Clerk

Approved as to Form:

_____
Michael J. Newman, Village Attorney

DRAFT

1895
VILLAGE OF
PINEHURST

PLANNING AND INSPECTIONS DEPARTMENT STAFF REPORT

To: Mayor Strickland and Village Council
From: Darryn Burich, Planning & Inspections Director
Alex Cameron, Planning Supervisor
Date: July 21, 2022
Subject: Staff Report on the Pinehurst South Small Area Plan

Note, at its 5/5/22 meeting to consider the Pinehurst South and Village Place Small Area Plans, the Planning and Zoning Board recommended a land use change (residential to nonresidential south of Blake Boulevard) to the proposed land use plans on pages 72 and 73 of the Plan. Staff has noted that recommendation on the corresponding pages in the Plan and separately excerpted those pages and placed in Novus. Should Council concur with the Planning and Zoning Board's recommendation, staff will adjust the Plan's maps accordingly.

Council is being asked to consider the Pinehurst South Small Area Plan (SAP). At its May 5, 2022 meeting, the Planning and Zoning Board, received public comments, discussed, and provided a recommendation to Council on the Plan (please see 5/5/22 P&Z minutes for more information).

In contrast with Village Place, Pinehurst South has a significant amount of vacant land available for development at approximately 80 acres with an estimated 40 acres currently being marketed or consideration for development.. With the large amount of land available for development, having appropriate plans in place to establish a vision for future development and the appropriate regulatory controls (which occur after plan approval) to help prescribe the vision through architectural controls, build-to lines, street design etc.

As Council reviews the plans, and especially the renderings and illustrations, keep in mind that all the illustrations and renderings are "illustrative and subject to change" as is generally noted on the corresponding pages in the Plan. The illustrations show potential development patterns and will guide subsequent zoning changes and potentially direct public investments. Another note regarding the illustrations, is that they show the long term build out of the areas over the next decades based on current market absorption, which is subject to change based market fluctuation and demand.

Pinehurst South

Located almost directly south of the Village Center along NC 5, Pinehurst South encompasses approximately 290 acres with almost 47% of the area in a natural or undeveloped state. A portion of this planning area is unincorporated and is in the Village's Extraterritorial Zoning Jurisdiction (ETJ). The planning area also includes and abuts the historically African American neighborhood of Jackson Hamlet.

The Village of Pinehurst Harness Track abuts the area on the northeast, the Lake Pinehurst neighborhood on the west, and CCNC on the east. The area contains a mix of uses ranging from single family homes, to attached housing, multiple family, older auto oriented commercial uses (generally adjacent to NC-5), newer office uses, retirement homes and an office park (Trotter Hills). The 41 lot Pinehurst South Cottages subdivision was recently approved and is currently under administrative review.

The current zoning ranges from Neighborhood Commercial (NC), Office and Professional (OP), Multiple Family (RMF) and high density single family (R-5). Much of the current undeveloped lands are in NC, OP, and RMF zoning.

The 2019 Comprehensive Plan recommends redevelopment with office, medical, life-science, and research facilities supported with small-scale retail services and residential uses. The Comprehensive Plan also proposed the idea of an "Innovation Hub" on the west side of NC 5 below Blake Boulevard. An innovation hub serves as a district or campus where businesses and people are located to work in a collaborative environment to conduct research and grow related businesses. Anchor institutions, renovated spaces, various industries, startups, business accelerators, business incubators, and support services are key aspects of an innovation hub. Innovation hubs are commonly seen with medical, life-sciences, and educational institutions and generally require a large anchor such as an educational or medical institution to flourish.

Differing from the Village Place Plan, the Pinehurst South Plan does not have one "preferred build-out scenario" in favoring of showing low and high intensity scenarios with the high density scenario including more office square footage and attached single family homes (townhouses) versus single family detached. The Plans also include a mix of open space types including an approximate 6 acre central green park on the east side of NC 5 as shown on pages 72-73 of the plan and shown in detail on page 62 of the Plan. Most of the developable land on the west side of NC-5 is proposed to be in some form of residential use and to note most of those areas are currently zoned for multiple family use.

As part of the planning process, a market analysis was conducted and specifically examined the innovation hub concept recommendation (see page 15-16 of the market analysis). What the analysis found was that while there is ample land to create an innovation hub, "most of the ingredients of successful Innovation Districts are not present in Pinehurst South." Instead the analysis recommended developing a "modified Innovation Hub" planned to attract and facilitate companies and technologies related to the golf industry or golf cluster. The analysis specifically stated that "the creation of a walkable area with a strong sense of place would be attractive to a variety of users, residents, and visitors. The Pinehurst South Plan attempts to do this by creating a mixed-use environment east of NC-5 and south of Blake Boulevard by including commercial, retail, a 6-acre park, and single family residential (detached or attached).

The single family residential and park are the most significant deviations from the 2019 Comprehensive Plan recommendations for the Innovation Hub. The Comprehensive Plan did recommend housing in the form of 186 stacked residential units not single family attached or detached. Mixed-use can still occur but residential units have been proposed at the southern portion of the Innovation Hub area. This was done in part to create a more compatible land use scenario adjacent to Jackson Hamlet and because the plan was already identifying approximately 250,000 - 300,000 square feet of commercial/retail in the intensity plans. The central green helps to tie the mixed use area together and attempts to connect to other green an open spaces in the planning area. *Note, the Planning and Zoning Board has recommended a nonresidential land use pattern in this area in keeping with the 2019 Comprehensive Plan recommendation.*

A proposed "core" area shown on the intensity plans shown on pages 72 and 73 of the Plan and shown in detail on pages 57 and 58 of the Plan. This core area could contain a restaurant, coffee shop, and

market/incubator to focus retail and pedestrian activity. As a side note, staff has had positive discussions with property owners regarding the proposed core area concepts.

The Plan also identified the potential realignment of Monticello Drive to the south to create additional space on the Harness Track *should* the Village consider relocating all or some of Public Services operations. While some or all of those operations could likely locate within the current land use configuration, the additional space would allow additional landscape buffers to be created around the area if needed. Realignment of Monticello Drive would require property acquisition to the south of the current alignment. This could also create additional buildable parcels that could be sold by the Village for private development as shown on page 58 of the Plan as "proposed commercial".

The Plan also identifies various new streets and street extensions to better connect the neighborhood. A significant Plan recommendation involves identifying the potential of a shared use path to create a "Rails with Trails" network within the Aberdeen Carolina and Western Railway (ACWR) right-of-way running along NC-5. This would be a significant improvement to pedestrian and bicycle network and help to create a regional ped/bike connection. The shared-use path is only a concept, no design has been undertaken, and the ACWR has not approved anything other than being open to the "concept" and would have to be allayed of several concerns before allowing such a path to be located within their right-of-way. Rails with Trails networks operate successfully across the nation including places within North Carolina (Charlotte, Carrboro, Lincolnton, Cumberland County).

Recommendation

The Pinehurst South Small Area Plan is before Village Council for consideration for approval. Based on previous discussions regarding the Plan, staff presented the two options below that were considered by the Planning and Zoning Board at its 5/5/22 meeting. The two options focus specifically on the proposed residential land use pattern south of Blake Boulevard which would be a deviation from the 2019 Comprehensive Plan recommendation. No other significant changes were proposed to the Plan.

As part of its deliberations, staff is requesting Council take into consideration the recommendation made by the Planning and Zoning Board at is 5/5/22 meeting to support the Comprehensive Plan's nonresidential land use recommendation as reflected in Option 2 below, in addition to any other modifications Council would like to incorporate into the Plan.

Option 1:	Support the deviation from the Comprehensive Plan and addition of the residential uses south of Blake Boulevard as identified on pages 72 and 73 of the Plan.
Option 2:	**Recommend changing the proposed residential land use pattern south of Blake Boulevard as identified on pages 72 and 73 of the Plan to non-residential land use pattern** (P&Z recommended option).

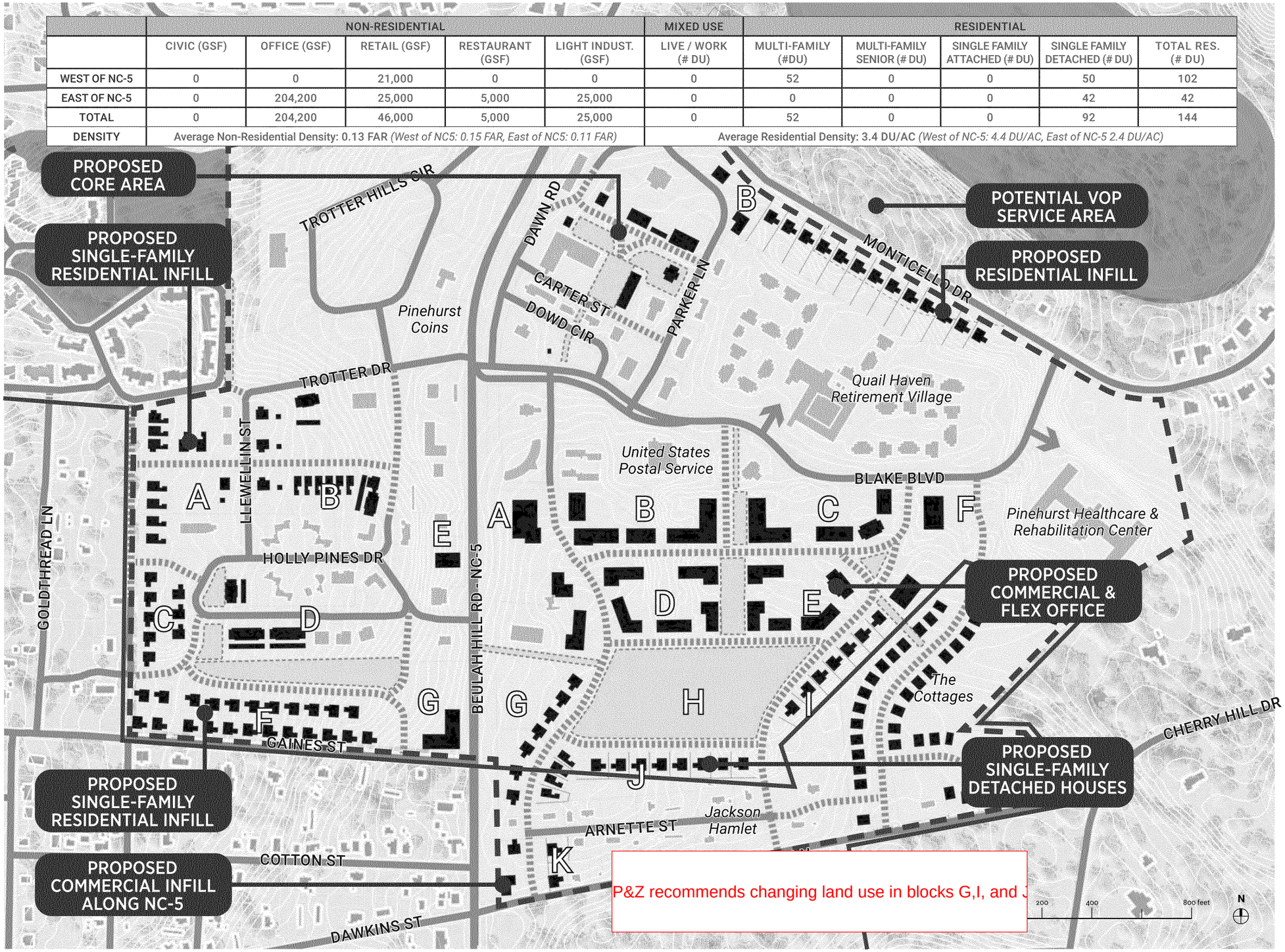
Build-Out Plan - Scenario 1 (low)

The Build-out Plan - Scenario 1 represents the cumulative efforts of the consultant team to create one potential, low intensity scenario of how the build-out of Pinehurst South may occur over the next 50+ years. This scenario is illustrative only and should not be considered the only option for this area. This build-out plan is based on the market demand and absorption rates per use, as projected by Duggal Real Estate Advisors (DREA). The *Pinehurst South Form-Based Code* (FBC) will regulate the character of development, in dimension, material, and detail - see that document for additional information.

This scenario shows the following:

- A core area is established between Monticello Dr. and Blake Blvd., east of NC-5
- To the south of Blake Blvd., a large Central Green creates a focal point for new, mixed-use development, serving as a space for activities and gathering and a transition to nearby residential
- Single-Family Detached (SFD) fronts three sides of this Green.
- On the west side of NC-5, SFD, Multi-family (MF), and small open spaces infill the residential areas, while commercial infill fronts NC-5.

	NON-RESIDENTIAL					MIXED USE	RESIDENTIAL				
	CIVIC (GSF)	OFFICE (GSF)	RETAIL (GSF)	RESTAURANT (GSF)	LIGHT INDUST. (GSF)	LIVE / WORK (# DU)	MULTI-FAMILY (#DU)	MULTI-FAMILY SENIOR (# DU)	SINGLE FAMILY ATTACHED (# DU)	SINGLE FAMILY DETACHED (# DU)	TOTAL RES. (# DU)
WEST OF NC-5	0	0	21,000	0	0	0	52	0	0	50	102
EAST OF NC-5	0	204,200	25,000	5,000	25,000	0	0	0	0	42	42
TOTAL	0	204,200	46,000	5,000	25,000	0	52	0	0	92	144
DENSITY	Average Non-Residential Density: 0.13 FAR *(West of NC5: 0.15 FAR, East of NC5: 0.11 FAR)*					Average Residential Density: 3.4 DU/AC *(West of NC-5: 4.4 DU/AC, East of NC-5 2.4 DU/AC)*					



P&Z recommends changing land use in blocks G,I, and J

KEY

- VILLAGE OF PINEHURST
- SMALL AREA PLAN BOUNDARY
- EXISTING ROADS
- PROPOSED ROADS
- EXISTING PARKS/OPEN SPACE
- PROPOSED PARKS/OPEN SPACE
- A SUBAREA LABEL

This plan is illustrative only and subject to change. Source: Design Collective, Inc.

Build-Out Plan - Scenario 2 (high)

The Build-out Plan - Scenario 2 represents the cumulative efforts of the consultant team to create an alternative, marginally higher intensity potential scenario of how the build-out of Pinehurst South may occur over the next 50+ years. As with the low intensity scenario, this scenario is illustrative only and should not be considered the only option for this area. This build-out plan is based on the market demand and absorption rates per use, as projected by Duggal Real Estate Advisors (DREA). The *Pinehurst South Form-Based Code* (FBC) will regulate the character of development, in dimension, material, and detail - see that document for additional information.

This scenario shows the following:

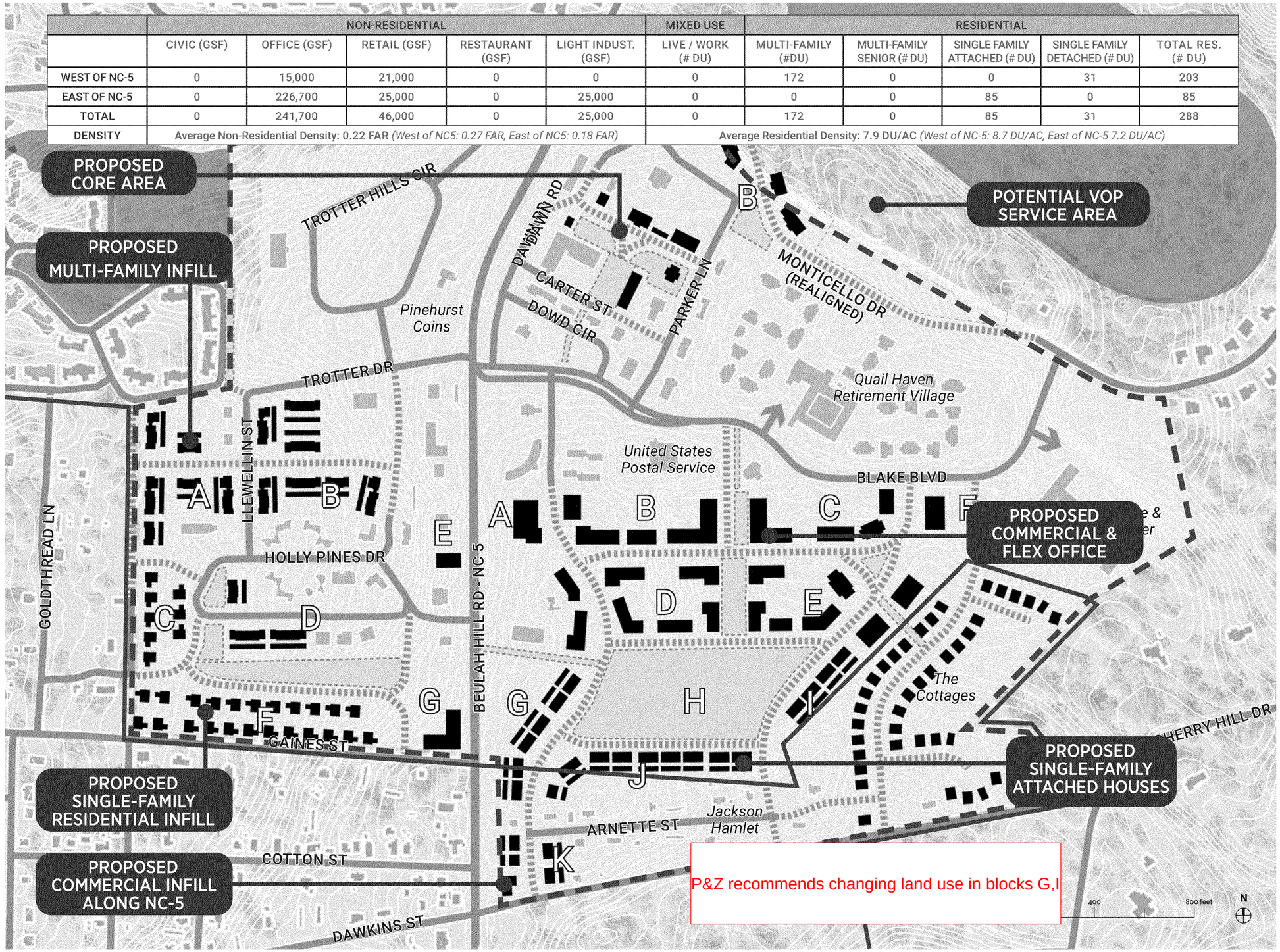
» A core area is established between Monticello Dr. and Blake Blvd., east of NC-5

» To the south of Blake Blvd., a large Central Green creates a focal point for new, mixed-use development, serving as a space for activities and gathering and a transition to nearby residential

» Single-Family Attached (SFA) fronts three sides of this Green.

» On the west side of NC-5, SFD, SFA, Multi-family (MF), and small open spaces infill the residential areas, while commercial infill fronts NC-5.

	NON-RESIDENTIAL					MIXED USE	RESIDENTIAL				
	CIVIC (GSF)	OFFICE (GSF)	RETAIL (GSF)	RESTAURANT (GSF)	LIGHT INDUST. (GSF)	LIVE / WORK (# DU)	MULTI-FAMILY (#DU)	MULTI-FAMILY SENIOR (# DU)	SINGLE FAMILY ATTACHED (# DU)	SINGLE FAMILY DETACHED (# DU)	TOTAL RES. (# DU)
WEST OF NC-5	0	15,000	21,000	0	0	0	172	0	0	31	203
EAST OF NC-5	0	226,700	25,000	0	25,000	0	0	0	85	0	85
TOTAL	0	241,700	46,000	0	25,000	0	172	0	85	31	288
DENSITY	Average Non-Residential Density: 0.22 FAR *(West of NC5: 0.27 FAR, East of NC5: 0.18 FAR)*					Average Residential Density: 7.9 DU/AC *(West of NC-5: 8.7 DU/AC, East of NC-5 7.2 DU/AC)*					



KEY

- VILLAGE OF PINEHURST
- SMALL AREA PLAN BOUNDARY
- EXISTING ROADS
- PROPOSED ROADS
- EXISTING PARKS/OPEN SPACE
- PROPOSED PARKS/OPEN SPACE
- A SUBAREA LABEL

PLANNING AND ZONING BOARD
REGULAR MEETING
THURSDAY, MAY 05TH, 2022
ASSEMBLY HALL
395 MAGNOLIA ROAD
PINEHURST, NORTH CAROLINA
4:00 PM

Board Members Present:	**Board Members Absent:**	**Staff Present:**
Jeramy Hooper, Chair	Julia Latham, 2nd Vice-Chair	Darryn Burich, Planning Director
Jack Farrell, 1st Vice-Chair	Paul Roberts	Alex Cameron, Planning Supervisor
Matt Jones		Shannon Konstantinou, Clerk to the Board
David Alzamora		
Phillip Shumaker		
Louise Mercuro		
Sonja Rothstein		

Approximately 19 member(s) of the public in attendance.

I. Call to Order

Mr. Hooper called the meeting to order at 04:00 PM, confirmed a quorum was present, and explained the purpose of this meeting. Mr. Hooper noted the absence of Ms. Latham and Mr. Roberts, and noted the late arrival of Ms. Mercuro and Mr. Shumaker.

Ms. Mercuro joined the meeting at 04:04 PM.

Mr. Shumaker joined the meeting at 04:22 PM.

II. Approval of Minutes

A. 04-07-2022 Regular Meeting Minutes

Mr. Farrell moved to approve the minutes of the April 07th, 2022 Regular Meeting. Seconded by Ms. Rothstein. Approved by a vote of 5-0.

III. New Business

A. Consideration of Small Area Plans (Village Place and Pinehurst South)

The purpose of this item is for the Planning and Zoning Board to discuss and provide a recommendation to the Village Council on the Village Place and Pinehurst South Small Area Plans.

The Board will take separate action on the Plans.

The Board, Mr. Burich, and Mr. Cameron discussed the Village Place area of the Small Area Plans. Mr. Burich stated the goal for the meeting is to finalize a recommendation for the Small Area Plans to be forwarded to Village Council. Mr. Burich reviewed the

recommendation options available to the Board and the need for a majority vote in order to move forward with a recommendation to Council. Mr. Burich clarified the recommendation of the Plans is the first step in the process of implementing the Plans and further actions, such as developing a Form Based Code (FBC) and Zoning changes will be required.

Mr. Burich reviewed the documents provided to the Board, gave an overview of the Village Place area, and analyzed the Small Area Plan recommendations for this area.

Mr. Burich reviewed the four options for recommendations regarding Village Place as provided in the Staff Report and provided details on how the recommendations of each option would influence the Small Area Plans.

Mr. Hooper opened discussion to Public Comments from attendees.

Ms. Lynn Goldhammer, 11 Salem Ln.: questioned the ownership of potential attached houses. Mr. Burich stated the proposed attached houses would be townhouse style properties where ownership of one townhouse would be separate / different from ownership of the one next door. Ms. Goldhammer questioned maintenance responsibilities in relation to the attached houses. Mr. Burich stated maintenance responsibilities would depend on the structure of ownership. Ms. Goldhammer stated when two different owners own different sides there is a potential to get shabby really quickly due to different ownership, and questioned how many properties would be built in this area. Mr. Hooper stated the Board and / or Staff may not be able to answer all questions due to the fact that the Plans are meant to be an overall plan for the area not to provide specifics on future development.

Mr. Steve Saye, 5 McDonald Rd. E: stated he controls a 3.9 acre parcel in the area. Mr. Burich verified Mr. Saye owns the property at 20 McCaskill and asked Mr. Saye his thoughts on the Plans proposed for the Village Place area. Mr. Saye stated more flexibility is always good, he is worried about next 100 years not the next 10 days, and is fortunate to have that timeframe. The intent is to put a legacy property at this address that in 100 years will be looked upon as the right thing. Parking is a major issue, the Village does need to address parking and traffic (the #1 issue) but traffic doesn't preclude people from moving here. Come up with the best plan possible but this not a "Soviet" style Plan, how do we best fit what the community needs going forward, Pinehurst is going to grow, cannot put the gates up around Pinehurst, people are going to find places to put their product whether others like it or not, irrelevant and out of the town's area. Mr. Hooper asked if the Village and / or Board may call upon Mr. Saye as a property owner in the Village Place area should a direct question arise. Mr. Saye stated he would be happy to comment.

Mr. Ted Copper, 105 Rattlesnake Trail: doesn't notice a lot of change for his property, concern over the change of multi-family to single family and "gentrification" part of the Plans as it will push a lot of support staff for local businesses who rely on this type

of housing further and further from town increasing commute times, doesn't see who this change is helping.

Mr. Frank Maser, 45 Community Rd.: understands the intent is to look at the big picture, 20-30-40-50 year plan, but, when the recommendations come down to specific zoning, the Board should retain the diversity of uses and the flexibility for developers to create what they want to create. Likes the concept but there is a long way to go and continue it. Need diversity in zoning. Village mixed use is a very good zoning district to help create what the developers want to create. Asks for thoughtful consideration before changing zoning to some very specific single use zoning as mixed use zoning is what is needed.

Mr. Kevin Drum, 41 Shaw Rd.: thanked everyone, is impressed with work Staff has done by giving the Village a strategy for the future in Form Based Codes, whatever the use is it will be good looking, and hopes this is the beginning of the use of Form Based Code within Pinehurst. Mr. Drum gave a background of the ownership of the three undeveloped lots he owns with his wife, Ms. Jennifer Stoddard, on Magnolia Rd. Is concerned with the lack of flexibility for the future by zoning lots residential instead of mixed use. Gave a brief overview of the area surrounding his lots and the industrial history of this area within Village Place. Feels his properties have been singled out and is asking for the Board to have an open mind and listen to the professionals due to the market driven nature of the area and development. The luxury of Form Based Codes and the Historic Commission having to approve projects gives the Board a layer of protection. See the possibility of residential development for personal use but mixed use seems to be the best zoning for this area. Will do what the Village decides as always. Stated he is open to speaking with the Board should they wish.

Mr. John Webster, 140 McKenzie Rd. W: stated he sees very little change in the Plans, meeting after meeting the Public always has things to say but it doesn't seem to matter, go through the process but nothing changes as Staff has made a decision and that is what we are going to get again and again. The properties owned by Mr. Drum weren't originally included in the Plans, then they were, and are now potentially out of the Plans again. All of this is happening against residential property owners on Caddell Rd. and no one seems to worry about them. To take the Public Services facilities to Monticello at the cost of noise and smell seems very unfair to people who live there. Marketing plans should not drive Plans, it should be what we want of this place, don't have to cater to marketing. If people are saying over and over again they want low density, you should listen.

Mr. Hooper stated the list of speakers had concluded and invited any additional audience members who would like to speak to do so. None asked to speak.

Mr. Hooper asked the Board to provide general comments, as a Board there are many elements to consider and there is a lot of input, and the Board is responsible for funneling this down to a decision. If the Board has a concern or recommendation, please, have a solution to provide.

Mr. Shumaker apologized for his late arrival, noted items mentioned by attendees, such as quality over quantity, flexibility, no single family, preserve single family, form based code, and consistency. Have to get out in front of the issue, growth will happen. The Village must have some sort of plan, nothing that is concrete it will be fluid. Without plans something could get built that isn't what is wanted. The Village must have some sort of roadmap in place, growth is coming and is going to happen. There can be conversations around preservation or conservation, but must have a plan moving forward otherwise growth will take its own form.

Ms. Rothstein stated the Monticello facility was addressed at the previous meeting, and discussed Magnolia staying residential, especially the three lots owned by Mr. Drum, and should stay residential.

Mr. Alzamora thanked participants, a plan gives an opportunity to get in front of what is inevitable. The area has changed significantly in 30 years, perspective of a kid growing up here is different from someone who has moved here. The goal is for everyone to enjoy the resources and charm of the area. The area needs to serve all of us, not just those who live here (all the visitors / out of town workers / those who spend a day of their life here). The area will change over time and we need to consider how to make this beneficial for all. The flexibility provides housing / business /employment opportunities. A lot of people are getting stuck on details, plans give an opportunity to decide usage doesn't mean this is exactly how this area will look. Agree flexibility would be most favorable in this area, don't want to short side yourself. The concerns over prior uses doesn't mean something will get torn down while current uses are in place, they will be grandfathered in. Affordable housing is definitely an issue in area as a whole, like the flexibility of opening this to something other than Single Family Dwelling, would potentially alleviate some of these issues.

Mr. Farrell seconded prior comments and stated the plans as seen from the consultants show buildings in certain spots but these buildings are just filler blocks, this is not where / how building will exactly be, meant to give a feeling of how buildings / streets / blocks will look. The Small Area Plan is meant to give a vision of how the area could develop. Favorable to flexibility, it is a mistake to lock down to only Single Family Dwelling. The Board talked about road structure, traffic, spent quite a bit of time on these issues. There was less concern about Village Place design than Pinehurst South, overall the community feels good about this design. The expansion of commercial infill to the three empty lots along the west side of Magnolia is in conflict with the 2019 Comp Plan. Staff was involved in developing the 2019 Comp Plan. In addition, all Public Workshops and breakout rooms showed the borders excluding these lots. It is a mistake to change the Comprehensive Plan.

Ms. Mercuro stated generally agrees with everything said. This is a good, solid plan and is a comprehensive, long-range plan (not something that will happen tomorrow). Need to educate the public about Form Based Code. The plan is well thought out form

based code, which is the perfect type of code to use in the Village. In general, is a really good plan and serves as a guiding principle moving forward.

Mr. Jones reiterated Ms. Mercuro's comments on Form Based Code and stated Form Based Code gives flexibility, and re-iterated Mr. Alzamora's comments regarding implementation of the plans not altering use for current property owners. Mr. Burich stated Mr. Jones is correct, use will continue as is and does not change with the sale of property, only changes when use changes. Mr. Jones asked for clarification on how the four recommendation options to Council effect zoning for the underlying properties and how restrictive will the decision be on future development. Mr. Burich stated Form Based Code has to be implemented, uses will be included in the regulating plan, if a use is objectionable this can be addressed in the recommendations and changes made to the illustrations as the illustrations need to match up with the vision for the future. Mr. Jones asked for clarification on the zoning for the three lots in question on Magnolia along with the adjacent 3.9 acre lot, and whether the Board is being asked to make a decision on the use of these lots. Mr. Burich stated the three empty lots along Magnolia are zoned R10 (residential and VR), the four options provided are to help the Board move forward with a recommendation to Council, the statement by Mr. Farrell is correct regarding the Comp. Plan, whichever way the Board moves forward there needs to be a consensus or support for the determined use for the three lots. Mr. Burich reviewed the four options provided for the Board to use in determining a recommendation for Council.

Mr. Hooper clarified the four options provided by Staff are based on concerns or hot topics that had come up in prior meetings and Workshops, and Staff is providing the options as a tool for the Board to use in determining their recommendation to Council. Mr. Hooper further reminded the Board to recall concerns or hot topics from prior meetings that may not have been covered during the current meeting when making a determination on their recommendations to Council. Mr. Cameron stated the options are Staff's best attempt to paraphrase hot topics from Work Sessions, Staff laid out options the best way possible from prior comments made by Board members.

Mr. Farrell stated the Staff failed to mention in the Staff Report that this subject matter was discussed in meetings with a majority of Board members attending where it was decided to revert back to the original boundaries for Village Place. Mr. Cameron stated Staff painstakingly reviewed meeting videos, minutes, and notes; and it was not a clear consensus or majority on excluding the lots in question. Mr. Burich stated the opinion of the Board was pretty split, some for, some against, and a gray area in the middle.

Mr. Hooper stated this topic is going to be pretty well discussed by Council, the Board's job is to make recommendations as correct and in-line with zoning changes that will make the implementation of the Small Area Plans possible. If the Board ends up singling out any properties, the Board needs to be specific to any zoning changes that will need to be made in implementation of the plans.

Mr. Jones stated clarification on what the decision made today will do in terms of what it will prohibit and not prohibit the Village from doing in the future was given. In terms of flexibility for the future, option four seems to provide the most flexibility. Mr. Burich displayed the options for the Board to review. Mr. Hooper clarified that, should the Board not choose any option, the plans would move forward as is.

Mr. Jones stated he was in favor of the three lots in question remaining residential with the rest being mixed use or whatever is most flexible as mentioned in prior meetings.

Mr. Hooper asked the Board to begin formulating a motion and reviewed the motion template provided as a tool in formulating a motion.

Mr. Hooper asked Staff to outline the next steps to be taken in implementing the plan. Mr. Burich reviewed the process moving forward after the adoption of the Plan, and how Form Based Code does not control uses so implementing the plans will be a hybrid of zoning regulation and Form Based Code. When the regulating plan gets developed that is where any zoning changes would need to be considered and made in order for development to happen according to the plans. The Board clarified the zoning of areas could be changed in the future with zoning requests. Mr. Burich stated the process doesn't have to happen overnight can be done over time.

Mr. Farrell asked for clarification on what is being shown in the map for the area along McCaskill and Magnolia Roads. Mr. Burich stated this area of the map shows mixed use buildings.

Mr. Hooper asked for clarification on how zoning requests would affect use in this area. Mr. Burich stated the overlay will stay the same, FBC will determine the building types allowed in this area, and when the overlay is created the type of building will be determined by the regulating plan.

Mr. Farrell asked for clarification on how Form Based Code would be applied to Single Family Detached development. Mr. Cameron stated the Village Place area being located within the Historic District acts in the Village's favor, however, it depends on what portion of form based code is being considered, any design elements defined outside of the Historic District statutes the answer would be, "No".

Mr. Farrell asked for clarification on whether it is possible to apply a zoning requirement or prohibition to the overlay for the district that would prohibit the lease or rental of a residential structure for less than six months. Mr. Burich and Mr. Cameron both the answer to this question is yet to be determined.

Mr. Cameron stated the 3.9 acre "Traditions" parcel might be the best example of how the base zoning might need to change after the plan is adopted.

Mr. Farrell questioned whether, based on previous comments, it was better to allow for maximum flexibility then use form based code to get the best design. Mr. Burich stated

it depends on how flexible the Board wants to be, if there is a specific building type the Board does not want to see in the area then that building type is excluded from the plan, will want to have some limitations to that flexibility, it is important to get things right on the base plans because as the form based codes and zone changes are crafted things will have to line up.

Mr. Farrell asked for clarification on whether it makes sense to divide a parcel up by use, restricting commercial only on one side and residential only on the other side of the same parcel. Mr. Burich stated that should be possible to do, the overlay can be divided in this way.

Ms. Mercuro stated not all mixed use is the same, could be residential/commercial mixtures, height of buildings is more important to Form Based Code, but use inside might allow a mix of residential / commercial / office use, more about how the community sees the area, this is a village and want to remain a village.

Mr. Burich asked the Board to consider the pattern of use the Board wants for this area, from a planning standpoint try to align uses on each side of the street, if additional flexibility is desired that can be done as well, can be as limiting or as flexible as the Board wants but the process starts with this type of land use plan, and the details of how to implement the plans are up to Staff but the Board needs to tell Staff what the vision for the future of the area is.

Mr. Hooper asked for clarification on the next steps in the process and a timeline. Mr. Burich stated the next step will be to develop the Form Based Code and make updates to the PDO (concurrently), but before work can begin on Form Based Code and the PDO the Village Council has to give their approval.

Mr. Hooper asked that the Board ensure they have identified concerns so those concerns can be passed on to Council with a recommendation that gives insight and thought process, and that the Board be sure they are prepared to give a recommendation to Council (always the first question to themselves). If the Board is prepared to make a recommendation, what will that recommendation be / look like. A lot of hours were spent considering the plans and the public comments have been addressed by the Board in previous discussions. The plan is a guiding principle and illustrative of what could happen if the overall theory is adopted. The plan is not a new plan, per se, just a new direction. There is talk of market / outside pressures, what is important is whether the plan is driving towards what the community wants / desires as well as what the Village's capabilities are. In terms of the definition of community; Moore County is the community, a series of small towns, what one town does affects the other, and oftentimes there is duplication of uses (something for the Board to consider). Does this plan support the direction that the current residents want and the "retirement settler", understand the changing demographics but the area has always been a niche attractive to retirees, the Village needs to continue to ensure the community is attractive to retirees as this is something unique to this area.

Mr. Farrell clarified the Village Council will be comparing Form Based Code and regulating documents against these plans.

Mr. Hooper stated it is important the Village not be put in any future compromising positions based on unforeseen concerns, and questioned whether there was anything in the plans that could potentially make this happen. Mr. Hooper asked the Board to give feedback.

Mr. Jones stated he is leaning towards option four, which would allow residential or commercial along Magnolia. Mr. Burich stated this option would allow either / or and would build flexibility into the plans. Mr. Burich reviewed option four with the Board.

Mr. Farrell gave support for option four if revised to exclude the three empty lots in question along Magnolia Rd. and going back to the original boundary of the Focus Area.

Mr. Alzamora clarified the three lost in question for the boundary area are Mr. Drum's. Ms. Jennifer Stoddard asked to speak.

Ms. Stoddard stated she didn't realize the meeting would be about the three lots they own and cannot wrap her head around why their three lots are the subject of discussion. Mr. Alzamora stated the three lots are subject to discussion due to their location on the edge of the plan and weren't included in the 2019 Focus Area. Ms. Stoddard stated she is still confused as to why their properties are being singled out. Mr. Alzamora stated it is purely due to the difference between the two sets of plans, which resulted in the boundary line shifting to include their properties. Mr. Farrell stated the concern is over potential commercial development in the backyard of existing single family housing. Ms. Stoddard stated the three lots in question face a big brick industrial building (CenturyLink) and it was stated it is important to have continuity across the street, not backyard to backyard but across the street. Mr. Drum further stated should the two new roads not be added, the three lots in question remain in a state of quasi-residential.

Mr. Alzamora stated the owners of the three lots seem to be in agreement with the plans, and are part of the plan to allow the commercial development in this area.

Mr. Farrell stated the concern is the Public has been told for two years that the boundaries are such and it is a mistake to tell the Public one thing and do something else.

Mr. Shumaker stated the three lots in question were specifically called out by public comments in previous meetings, which is why the lots are being discussed.

Mr. Hooper stated the discussion of the three lots in question arose due to a consideration of where exactly to put the stopping point for commercial development in the plans. The concern for today's discussion is the impact of commercial development on the residential development along Caddell Rd., especially with parking

being in the rear of the commercial development along Magnolia Rd. as illustrated in the plans. Need to keep moving forward towards a recommendation to Council. Should any member of the Board have any reservations regarding the recommendation to Council, Mr. Hooper wishes to discuss those reservations and provide an alternate motion. As a Board, need to keep the decision to the basics of zoning and not involve politics.

Mr. Alzamora moved that the Planning and Zoning Board recommend the Village Place Small Area Plan to the Pinehurst Village Council for adoption with revision(s) based on the following option: (Option 4) Support non-residential or single family attached or detached along the Magnolia Road frontage retaining the single family detached pattern to the west. Seconded by Ms. Mercuro.

Mr. Farrell moved to amend the motion to include the statement the boundary of the Small Area Plan will revert to the initial boundary as designed in the Focus Area and original Plan as shown to the Public in 2021. Seconded by Mr. Jones.

Mr. Burich reviewed for the Board what the amendment would mean in terms of the plan boundaries.

Amendment: Approved by a vote of 5 to 1. Mr. Alzamora voted "nay".

Motion as Amended: Approved by a vote of 5 to 1. Mr. Alzamora voted "nay".

Mr. Hooper recessed the meeting at 05:35 PM and reconvened the meeting at 05:45 PM.

The Board, Mr. Burich, and Mr. Cameron discussed the Pinehurst South Small Area Plans. Mr. Burich reviewed the documents provided to the Board, gave an overview of the Pinehurst South area, and analyzed the Small Area Plans recommendations for this area.

Mr. Burich reviewed the two options for recommendations regarding Pinehurst South as provided in the Staff Report and provided details on how the recommendations of each option would influence the Small Area Plans. Mr. Burich further discussed the concerns of vested Property Owners shared with Staff and the Board regarding low density development, sidewalks cutting through properties, and Page Rd. becoming a public instead of private road (Mr. Burich stated from a circulation standpoint extending this road would be a good way to better connect this area, however, this doesn't have to happen to make the plan work, is not an official map of roads just shows the potential way this area could come together). Mr. Burich outlined the areas marked G and H of the plan stating these areas will be the primary focus of discussion in order to determine if the planned use remains the same or changes to a use similar to the areas marked B, C, D, and E of the plan.

Mr. Hooper opened discussion to Public Comments from attendees.

Ms. Lynn Goldhammer, 11 Salem Ln.: gave background as to why she almost always speaks against any kind of development at public meetings; cited her experience with overinflated housing markets in areas such as Seattle, Washington, which tend to create homelessness and tent cities, loss of business due to rent increases, development is an attempt to appeal to people from different parts of the country with much higher income levels, and stated the previous rendition of the Small Area Plans was marketed as being attractive to younger people who want a "walkable" downtown and older people who no longer drive as much, however, these types of developments are often very expensive and not affordable to these demographics; what does the Village want to be in the future; put commercial areas in but keep residential zoning the same; and once change is made cannot be changed back.

Mr. Blake Webb: work with landowner of the 27 acre tract within the Pinehurst South Small Area Plan area; has been involved in the process and watched the plans evolve; lives in Pinehurst ETJ, travels HWY 5 multiple times a day and is an area native; with regard to the 27 acre tract of land, Mr. Webb appreciates the two options presented, however, the landowners have been trying to sell the property since 2014, if greenspace is what the community wants the landowners are in favor of this option and would like to see the Village buy the property, if not, mixed use would best suit the property for both office / retail and residential alike, office use only would restrict the property and limit what the landowners could do with the property; asks that the Board consider the landowners' opinion.

Ms. Amy Damone, 25 Page Rd.: Vice President of Community Association Services (CAS) voiced concern over the plans showing inaccurate information regarding Page Street. Ms. Damone believes the area on the plans indicating Page Street as a Right-of-Way is a parking lot deeded to Courtyard Office Park Townhome Association and has concerns with the Small Area Plan showing the extension of Page Street to Olivia Lane. Ms. Damone stated copies of the documents reference are available for the Board and relayed information on previous conversations had with Staff during Public Workshop #4.

Mr. Drum was listed to speak next but was no longer present.

Mr. Kendall Squires, 8 Royal Dornoch Ln.: gave background on his personal experiences with Pinehurst and reasons for relocating to the area; stated he understand fully the desire of property owners to maximize their investments, however, the push for density may prove to be unfortunate; there is no question traffic will be worse than it is now; concerned more with infrastructure (for example, what is the depth of the water deposit for Pinehurst and what will Pinehurst do when there is a drought); has thought been given, in terms of density, to the impact of increased population on schools and other ancillary services, such as medical services; and recognizes the entire area is changing.

Mr. John Webster, 140 McKenzie Rd. W: stated looking at traffic numbers this is going to precipitate, given we are not making any new roads, this is going to fill HWY 5 with 15,000 trips a day; the area cannot afford this additional traffic; when considering options look to options that limit the additional trips.

Mr. Lorenzo Blackmon, 175 Olivia Ln.: gave background on his and his family's personal history with Pinehurst, stated not much has changed in the area where his family has lived despite the area now being part of the Pinehurst ETJ; owns four properties in the Jackson Hamlet area, which is an area that is very rundown, and nothing much is being done to improve the area; receives conflicting information on how to go about getting help for the area and to make improvements to dilapidated properties; would like to learn what is going on in his area and to know how business is done in the Village; mistakes of the past have not been corrected and need to start being corrected; residents of the area feel neglected, confused, and left out of the process; questioned annexation of the area; regulation requirements are a tax to lower income people of the area; want to come together to do something for everyone, to have the process be inclusive of everyone; the area needs amenities for the children and families; and action needs to be taken to help the people of the community and to improve the area for everyone.

Mr. Hooper thanked the audience members for their comments and moved the meeting forward to Board discussion.

Mr. Shumaker noted items mentioned by attendees, such as the connection of Page St. to Olivia Ln. and verified, should the Village be interested in this project, the Village would have to purchase the property (the property could not be taken involuntarily); that infrastructure is a valid concern; traffic is a concern and most of the traffic is local traffic; relayed the fact that annexation of ETJ areas is voluntary and must be applied for; stated it was good to hear from a longtime resident, especially from Olivia Ln., which is an important part of the discussion; stated he is in favor of low density and of non-residential development in areas G & H of the plan (just north of the proposed park area); and verified by low density means non-residential.

Ms. Rothstein stated non-residential development in areas G & H of the plan.

Mr. Alzamora verified the current plan is commercial, mixed use (allows for residential but must be stacked); stated commercial, mixed use would be favorable for the area, office use mixed in with restaurant / retail and open space would give people working and living in the area an outlet and variety of uses for the area, concern is always affordable housing and don't want to force people out of their homes or force migration out of the area, investment in the area should provide more opportunities and jobs, and no single family residential, like the idea of mixed use plan as it is currently.

Mr. Farrell stated extensive discussion has been done regarding the railroad crossing at Olivia Ln. and sooner or later the details of the crossing will need to be squared away, hopes the potential additional residential and / or commercial development in the area

will help spur improvement of existing dwellings in the area, plans for a shared use trail are interesting but a lot of negotiations still need to be done, most of the public is happy to see open space in the plans as there has been a lot of demand for a park or some type of open space whether that be commercial open space or residential open space, the appropriateness of moving the Public Services department and facilities to the area need not be a part of this discussion of the plans as that move is a long time coming with much discussion and planning still to be done before could happen; questioned the application of the plans and Form Based Code at the Trotter Hills office park due to that area largely being built out, however, the increased interest to buy and build in that area by local businesses shows some commercial interest for the area; main focus of discussion is whether residential development (of some type) should be allowed in the area previously designated as a commercial area; and is still of the opinion this area (G & H of the plan) is best left commercial for business to locate or relocate to the Pinehurst area and for the potential to have a golf hub (for companies like Golf Pride).

Mr. Shumaker added to Mr. Farrell's statement regarding business looking for commercial areas to relocate to within Pinehurst relaying information about a business that wanted commercial property in Pinehurst but ended up looking outside of the Village instead (a business that would have provided 100 jobs for the area).

Mr. Mercuro stated agreement with Mr. Farrell, believes there is opportunity for office in the area, there could be very nice office parks that join in some way, not for really high density residential development in the area (which doesn't seem likely to happen), believes the focus should be on office and service industry with some commercial should the area support it, and infrastructure is really horrible in the area and must be addressed before anything happens.

Mr. Jones asked for clarification on zoning uses proposed for the area, specifically the 27 acre property discussed by Mr. Webb, and the location of the proposed park / open space in relation to this property. Mr. Burich verified the current zoning for the area in question is neighborhood commercial / commercial / flex office, the location of the proposed park is mostly off the property in question, and stated there is an additional 8 acre property for sale (where the park is proposed), which is zoned OP. Mr. Jones proposed making a change to the Page St. extension depiction in the plan from a solid line to dotted line due to the extension being a proposal only. Mr. Burich stated a better solution might be labeling Page St. as private to cut down on confusion, and the rational for depicting the Page St. extension is the property having been originally designed to be a right of way through the area. The Board came to a consensus to make the change to the depiction of Page St. Mr. Jones proposed. Mr. Jones stated Moore County purchases water from Harnett County and various other municipalities in the area, growth will definitely tax utilities, however, the community is not isolated to our benefit. The Board and Mr. Burich reviewed zoning options for this area. Mr. Jones further stated, regarding the development of areas G & H of the plan, he is in favor of non-residential and sees the benefit of the plan in managing growth by affecting the density as much as possible.

Mr. Alzamora stated the plan for the space is what it is, referred to the "Cottages" (a high density development) being part of the plan area that had to be approved under the current zoning, and the Board needs to recommend a plan that will eliminate these types of incongruous development from happening in the area.

Mr. Hooper asked for information on the HWY 5 DOT timeline from Mr. Jones. Mr. Jones reviewed plans Mr. Farrell provided from the DOT regarding HWY 5, which outline the proposed work / widening of HWY 5 that will stop just short of Blake Blvd. and illustrate very little change to what already exists in the Pinehurst South area.

Mr. Hooper asked the Board to review the procedures and motion template provided by Staff in order to work towards formulating a motion on the Pinehurst South plan.

Mr. Hooper stated there will always be demand for multi-family development, especially in this area, which is something for the Board to take into consideration, a lot of reasoning and debate around multi-family development, and the pressure for this type of development will continue.

The Board and Mr. Burich reviewed the process moving forward regarding zoning and implementation of Form Based Code for the Pinehurst South area, and how much of the process for this area will overlap with the process for the Village Place area.

The Board and Mr. Burich discussed eliminating the innovation hub recommendation mentioned in the Comp. Plan in favor of a golf cluster recommendation based on lack of innovation interest and increased golf cluster interest resulting from the USGA opening Golf House Pinehurst.

Mr. Hooper stated support for connectivity in the area is needed in order promote movement within and outside of the communities in the area. The Board and Mr. Burich reviewed connectivity illustrations of the plan.

Mr. Shumaker recommended the Village discuss incorporating multi-functionality into the green / open space proposed in the plan as discussed in previous meetings (storm water retention ponds that serve as water features within the green space, etc.).

Mr. Alzamora moved that the Planning and Zoning Board recommend the Village Place Small Area Plan to the Pinehurst Village Council for adoption with revision(s) based on the following option: (Option 2) Recommend changing the proposed residential land use pattern south of Blake Boulevard as identified on pages 72 and 73 of the Plan to non-residential land use pattern. Seconded by Ms. Rothstein. Approved by a vote of 6-0.

IV. Comments from Attendees

None

V. General Business

Mr. Cameron relayed there will be a Board of Adjustment in June and will share information on the meeting with the Chair and the Vice Chair.

Mr. Shumaker thanked the Board for sharing resources to help with the decision making process.

Mr. Hooper re-iterated the Village's Communication Policy regarding Board e-mails being a part of public record, even if sent / received on personal devices or in personal accounts, when those e-mails relate to Village business and the importance of the Board not crossing the line into conducting Board business in those communications.

Mr. Hooper recognized Mr. Burich's birthday today, 05-05-2022.

VI. Next Meeting Date

A. 06-02-2022 Regular Meeting

VII. Motion to Adjourn

Ms. Rothstein moved to adjourn the Regular Meeting. Seconded by Mr. Alzamora. Approved by a vote of 6-0 at 07:02 PM.

Respectfully Submitted,

Shannon Konstantinou

Shannon Konstantinou
Clerk to the Board &
Planning Administrative Specialist
Village of Pinehurst

A videotape of this meeting is located on the Village website: www.vopnc.org.

The Village of Pinehurst is a charming, vibrant community which reflects our rich history and traditions.
Mission: Promote, enhance, and sustain the quality of life for residents, businesses, and visitors.
Values: Service, Initiative, Teamwork, and Improvement.

Focus Area 2: Highway 5 Commercial Area

New investment in the existing employment center on NC Highway 5, near the intersection of Blake Boulevard, provides interesting options to expand job opportunities in Pinehurst and increase access to facilities and services needed by residents. Approximately 290 acres in the Highway 5 Commercial Area Focus Area are represented by 145 different parcels. 47% of the land was identified as undeveloped in 2018, and additional land may be appropriate for redevelopment or infill development.

During Envision the Village, residents voiced concerns about how development of this Focus Area may impact traffic volumes on NC Highway 5 and Monticello Drive. Despite this, there was a recognition that current development in some portions of this Focus Area is not necessarily in keeping with the character of the Village and could be enhanced as redevelopment occurs.

This Plan recommends the Village consider creating a small area plan for this Focus Area with additional public input to ensure high quality development in keeping with the character of Pinehurst in the future. As discussed in the "*Taking Care of Business*" section of the Plan, the Village recognizes the need for the medical community to expand and the need to provide co-working and creative entrepreneurial spaces in the Village. With limited land designated for non-residential uses in the Village, this Focus Area may be a suitable area to provide adequate office space to support the local economy with an eye toward the workforce of the future. However, strict requirements for scale, density, and buffering requirements would need to be evaluated and considered. This can be accomplished by creating a small area plan, similar to the 2008 New Core Master Plan, which creates one connected master planned area with a primary focus on office, medical, life science, and research facilities with small-scale supporting retail services to create an "Innovation Hub". It could also include a residential component as well.

► Implementation Strategies:

2.3 Create a small area plan for the NC Highway 5 Commercial Area depicted in Focus Area 2 to facilitate redevelopment as an "Innovation Hub" with office, medical, life science, and research facilities supported with small-scale retail services and residential uses.

Also see Implementation Strategies 2.10, 2.11, 2.12, 2.13, 2.15, 2.16, 2.17, 2.18, and 2.20 in this section of the Plan.

Also see Implementation Strategies 4.2, 4.3, 4.6, 4.13, 4.14, and 4.15 in the "*Moving Around the Village*" section of the Plan.

Also see Implementation Strategies 5.12 and 5.13 in the "*Taking Care of Business*" section of the Plan.

Also see Implementation Strategies 6.1, 6.11, and 6.12 in the "*Supporting Infrastructure & Facilities*" section of the Plan.

Also see Implementation Strategy 7.14 in the "*All Things Green*" section of the Plan.



Development Status

- Developed Parcels
- Committed Parcels
- Re-development Potential
- Infill Development Potential
- Undeveloped Parcels

This scenario illustrates how the area might develop if it was transformed into an innovation hub, targeting greenfield development, infill development, and re-development opportunities in one connected master plan concept. Primary uses targeted for this area include medical, life science, and research facilities. Supporting uses may include retail, service, and some residential above first-floor, non-residential uses. New buildings in the area may be one to two stories tall. Surrounding residential neighborhoods would be connected to the village via a grid of walkable streets.

Use Allocation	
Single-Family Detached (d.u.)	8
Stacked Multi-Family (d.u.)	181
General Office (s.f.)	351,501
Medical Office (s.f.)	266,841
General Retail (s.f.)	209,976

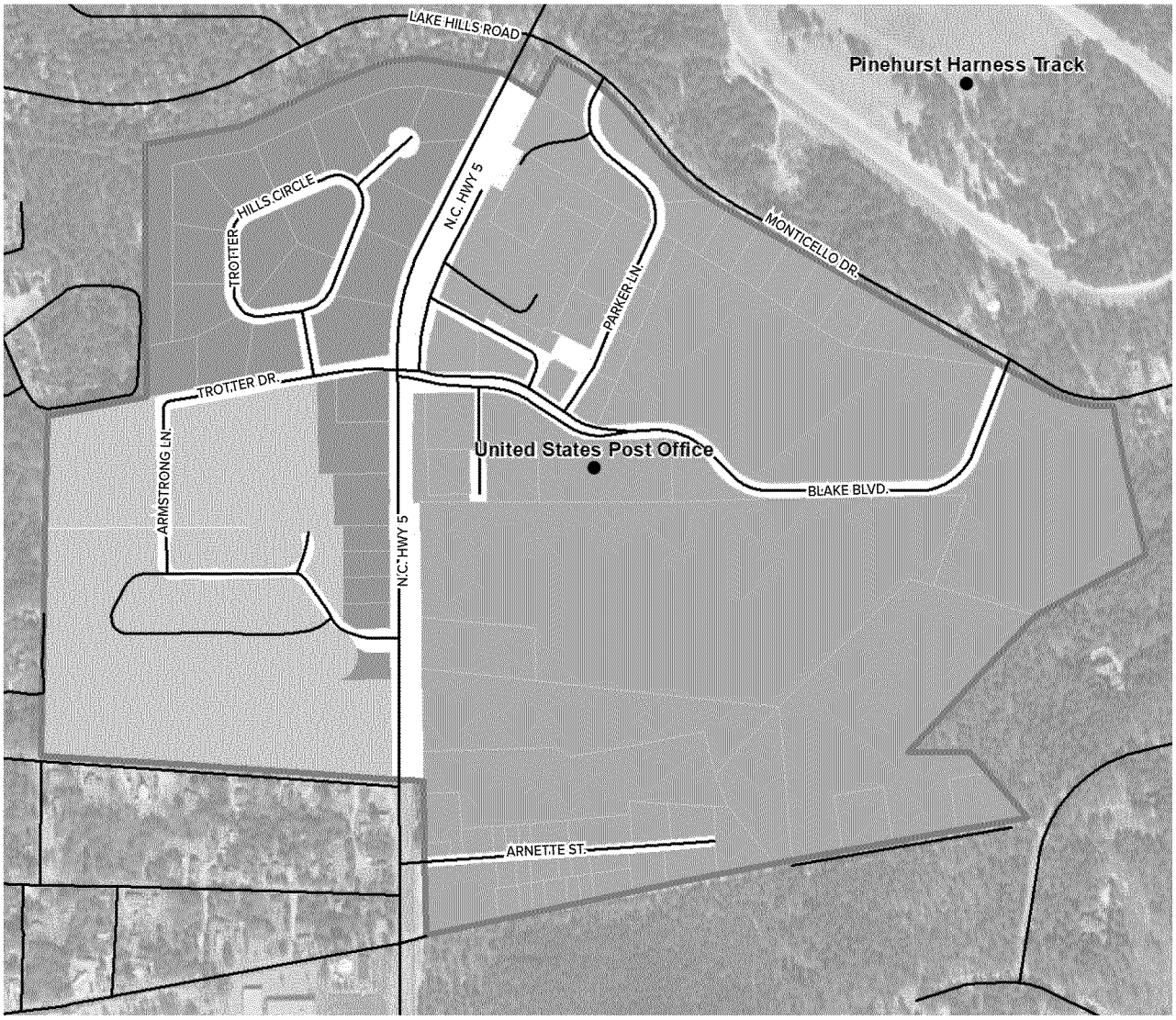
Likely Infrastructure Impacts	
New Students (students)	95
New Water Demand (mgd)	0.11
New Sewer Demand (mgd)	0.10
New Daily Trips (trips)	15,500

Community Character (% of acres)	
Suburban Neighborhood	19.9%
Suburban Center	14.8%
Mixed-Use Center - Stacked Residential	65.3%

Home Choices	
Single-Family Detached	4.2%
Stacked Multi-Family	95.8%

Community Characteristics	
New Residents	275
New Employees	3,137

Special Intensity Allocation	
WS-II BW Watershed (acres)	138
WS-III BW Watershed (acres)	-



Scenario Plan

- Mixed Use Center - Stacked Residential
- Suburban Center
- Suburban Neighborhood





This concept drawing is for illustrative purposes only, and is intended to provide an example of the type of "Innovation Hub" type development that could occur in Focus Area 2. This illustration depicts a mix of uses in a compact, walkable development pattern. A variety of open spaces including parks, plazas and greenways are provided for the enjoyment of residents and employees. The large central park area is intended as a space for gathering and collaboration.

VILLAGE OF PINEHURST
VILLAGE COUNCIL
CLOSED SESSION-JULY 26, 2022

ASSEMBLY HALL
395 MAGNOLIA ROAD
PINEHURST, NORTH CAROLINA

MINUTES

At a work session of the Pinehurst Village Council held at 10:15 p.m., Tuesday, July 26, 2022 in Assembly Hall of Village Hall, 395 Magnolia Road, Pinehurst, North Carolina, Councilmember Boesch moved to go into closed session pursuant to NCGS §143-318.11(a)(3) to consult with an attorney employed or retained by the public body in order to preserve the attorney-client privilege between the attorney and the public body, which privilege is hereby acknowledged. The motion was seconded by Mayor Pro Tem Pizzella and carried unanimously, by a vote of 5-0.

The following people were in attendance in Assembly Hall:

Mr. John C. Strickland, Mayor
Mr. Patrick Pizzella, Mayor Pro Tem
Ms. Lydia Boesch, Councilmember
Mr. Jeff Morgan, Councilmember
Ms. Jane Hogeman, Councilmember
Mr. Mike Newman, Village Attorney

MAYOR STRICKLAND CALLED THE MEETING TO ORDER.
Council received counsel from Mike Newman regarding the need to maintain and protect attorney-client privilege. Mr. Newman also provided legal advice and an opinion regarding the ability of the Village to successfully defend against any potential legal challenge to prohibiting short-term rental use in certain zoning districts.

ADJOURNMENT.
Upon a motion by Councilmember Boesch, seconded by Mayor Pro Tem Pizzella, Council unanimously approved to adjourn the closed session and re-enter the work session, by a vote of 5-0.

Upon a motion by Councilmember Boesch, seconded by Mayor Pro Tem Pizzella, Council unanimously approved to adjourn the work session at 11:15 p.m., by a vote of 5-0.

Respectfully Submitted,

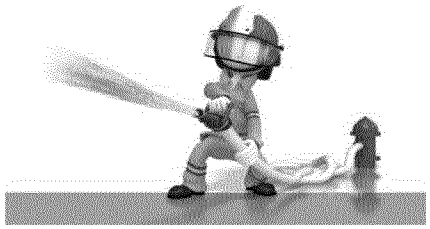
Kelly Chance
Village Clerk

DRAFT

PINEHURST FIRE DEPARTMENT

By The Numbers - FY 2022

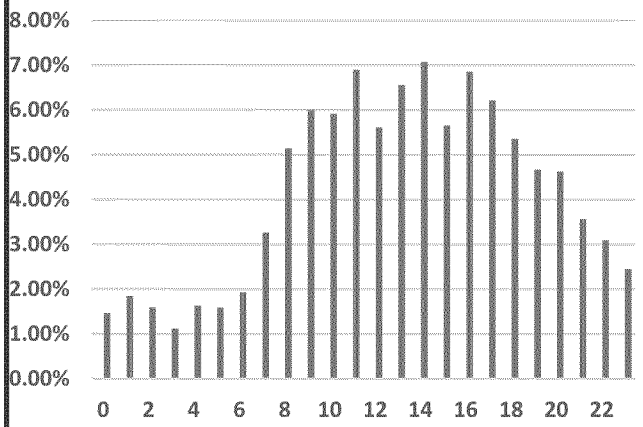
Calls for Service	**2335**
Overalpping Incidents	**25.82%**
Busiest day of Week	**TUES**
Busiest Hour of Day	**2PM**
Times Staff Recalled	**27**



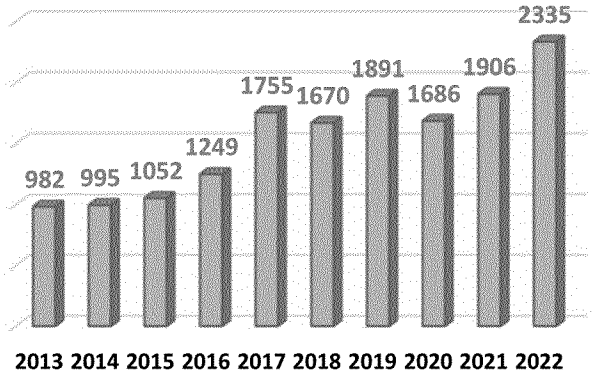
% of Calls for Service (CFS)



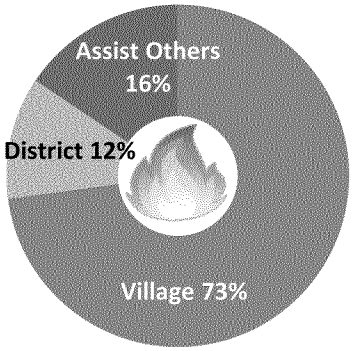
% CFS BY HOUR OF DAY



10 YEAR COMPARISON



LOCATION OF CFS





Fire Inspections Completed

325

Fire Inspector Plan Reviews

157



Days Since Last Lost Time Accident in FD **868**

YTD Training Hours

IN HOUSE	OUTSIDE
6106	**1267**

Public Awareness Contacts



202,113

Police Department Bi-Annual Report to Council
July 2022

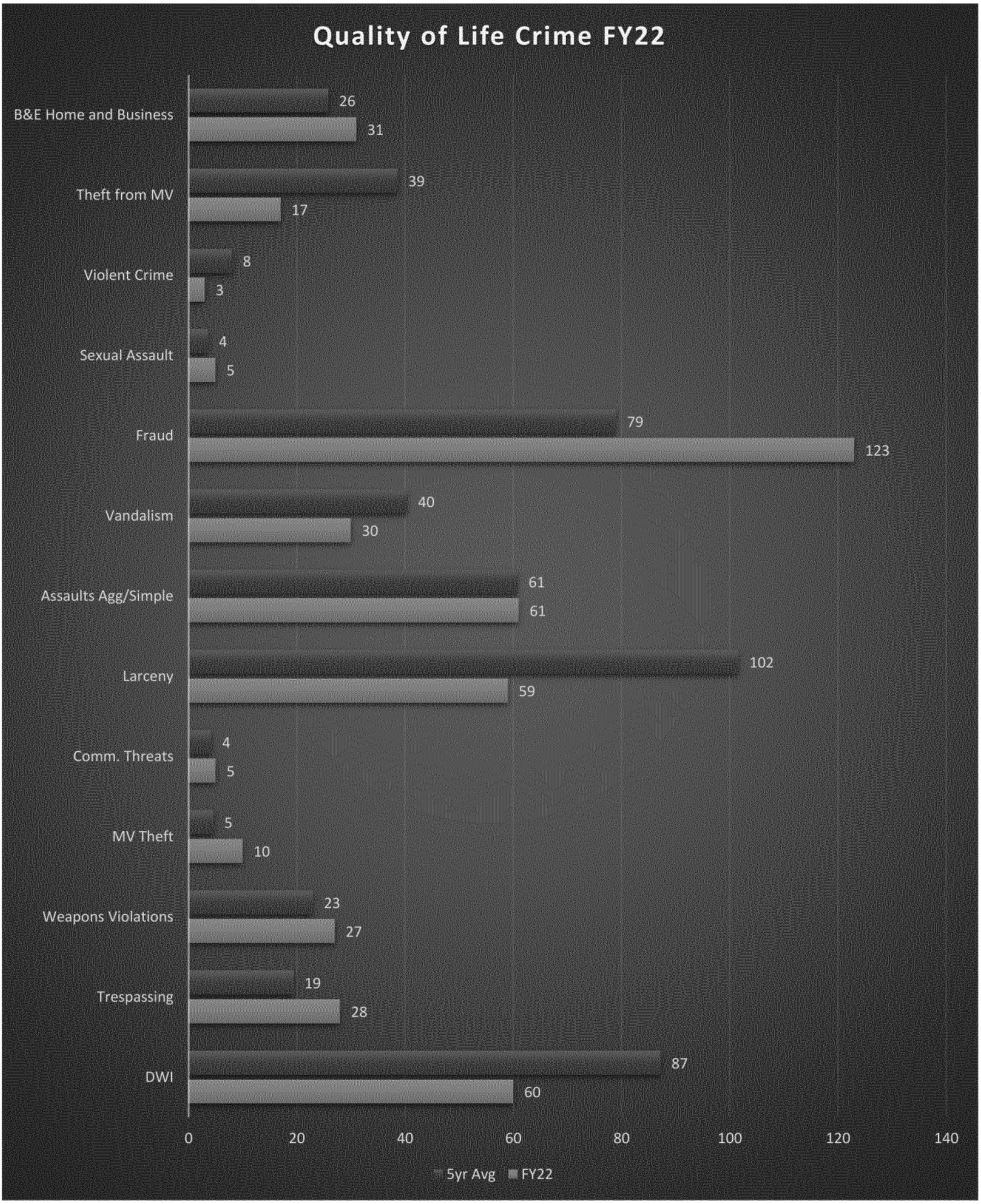


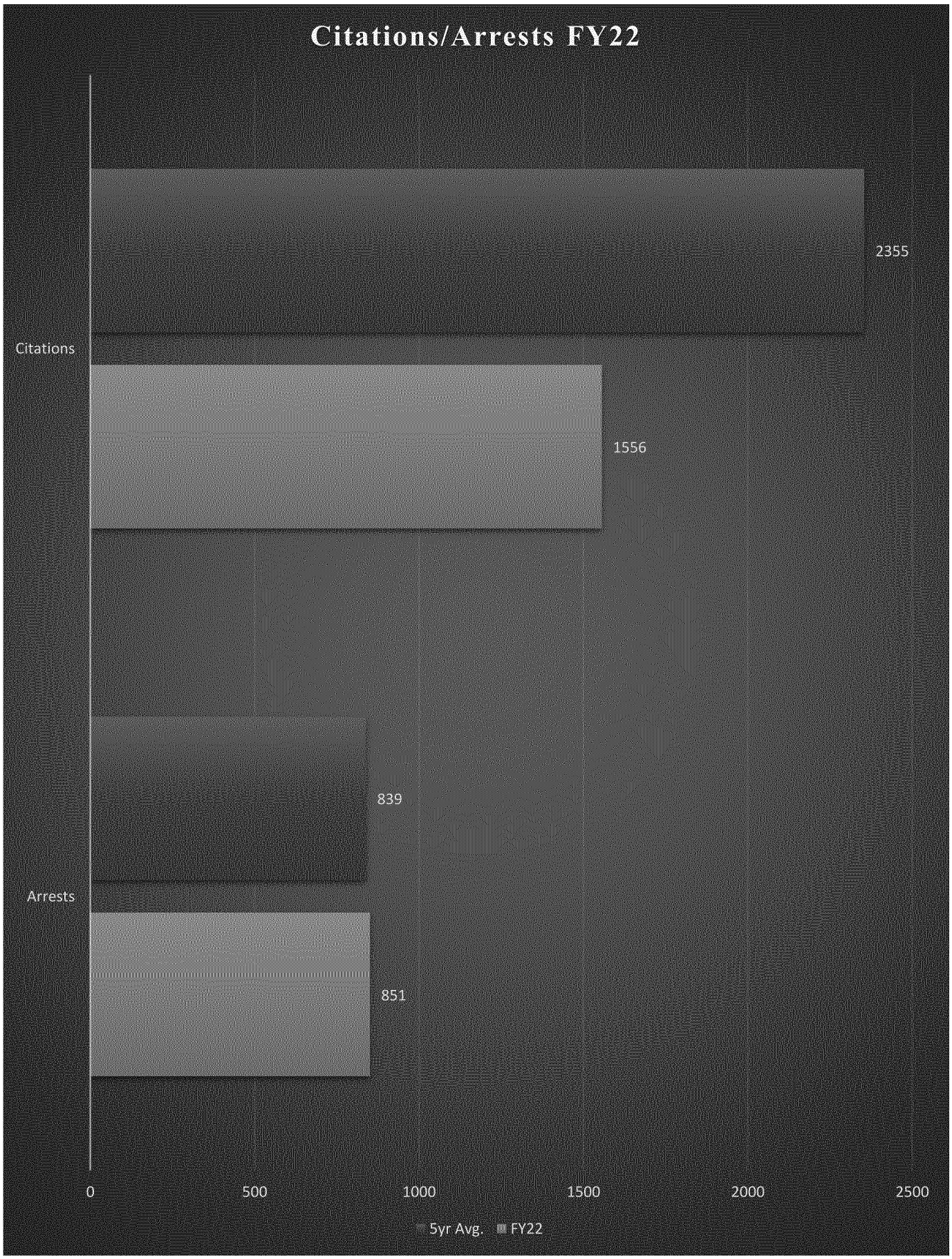
Prepared by

Chief Glen Webb

7.18.2022

Bi-Annual Report Calendar Year FY22 (With Previous 5 Year Avg.)




Citations/Arrests FY22
Citations
Arrests
2355
1556
839
851
0
500
1000
1500
2000
2500
5yr Avg.
FY22

Summary

Through the fiscal year as compared to the 5 year rolling average, crime is generally flat. Larceny had the largest decline while frauds had the largest increase, almost completely due to national and international credit card scams that occurred last year. Those were referred to federal authorities for investigation as they were occurring in a coordinated non-local fashion. Below I have inserted some charts that may be of interest, all timeframes shown are for fiscal year 2022. Chart 1 is the number of incidents compared with time of day. Chart 2 is the case status report which shows a large majority of cases are closed by arrest. Chart 3 shows the incidents per month in which September 2021 is our outlier month for FY22. When I drilled down in those stats, September accounted for just over half the breaking and entering cases we investigated. This illustrates that we are not subject to daily events of crime, but have a very safe community with an occasional rash of incidents. As chart 2 shows however, those incidents are quickly solved and most of the time by arrest.

Chart 1

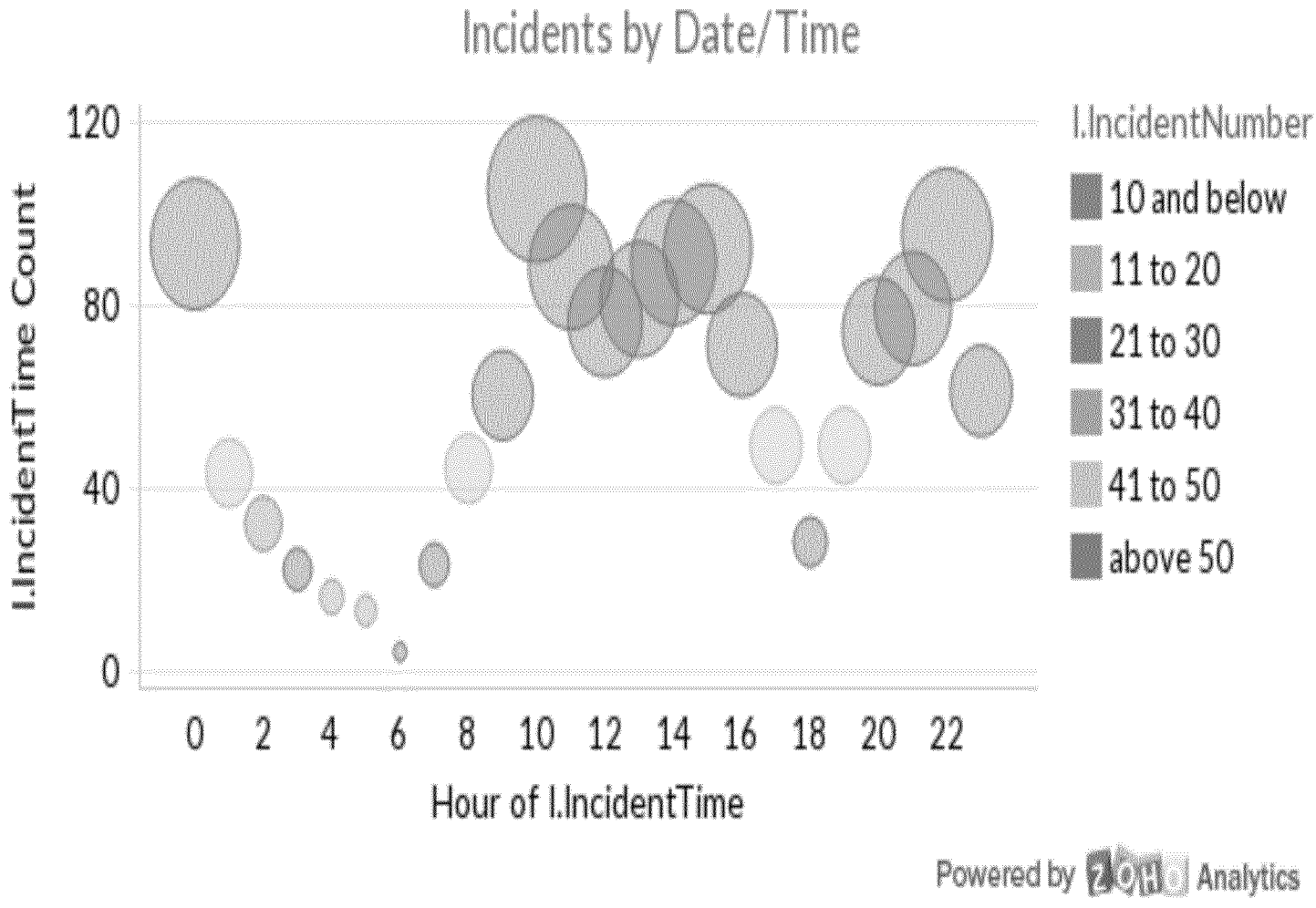


Chart 2

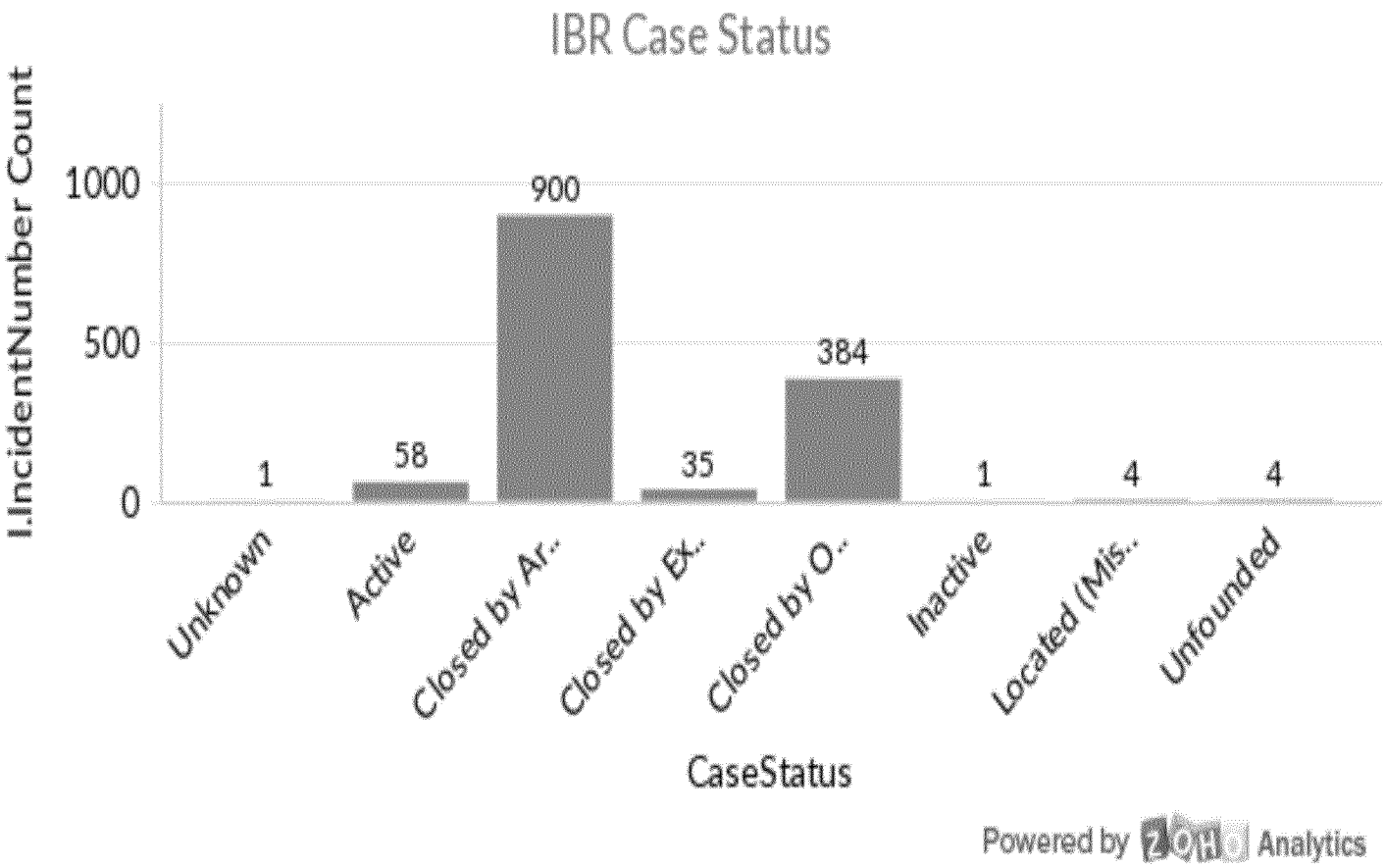
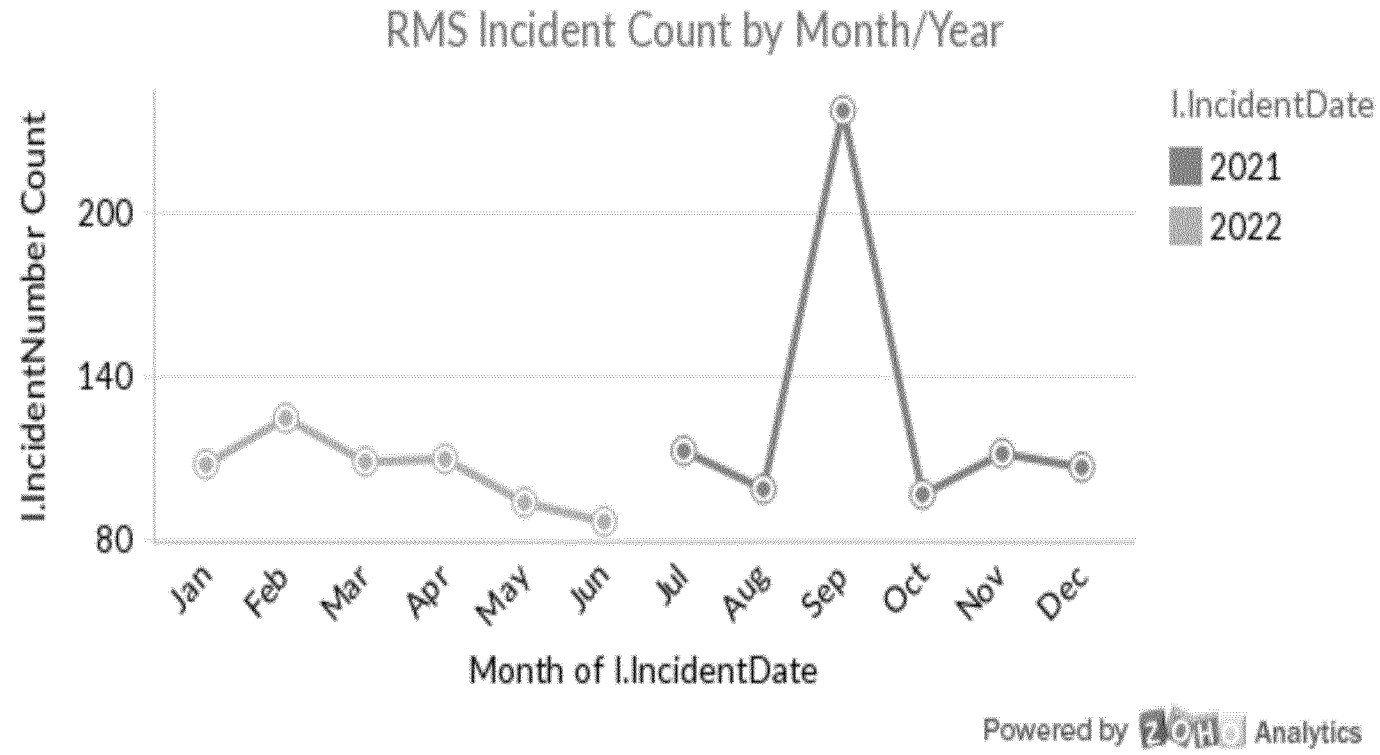


Chart 3





VILLAGE OF PINEHURST
SMALL AREA PLAN
MARKET ANALYSIS

APRIL 2, 2021| VERSION FINAL

Design Collective

DUGGAL REAL ESTATE ADVISORS

RKA RAMEY KEMP ASSOCIATES

VILLAGE OF PINEHURST

MARKET STUDY

INTRODUCTION

Background and Objectives

Duggal Real Estate Advisors, LLC is part of an interdisciplinary team led by Design Collective hired to complete Small Area Plans for two areas in the Village of Pinehurst. The Village of Pinehurst is located in Moore County, North Carolina southwest of Raleigh-Durham, east of Charlotte, and west of Fayetteville.

The market analysis is one step in the process to determine the feasibility of land uses within the Village of Pinehurst and the study areas. It ascertains the quantitative and qualitative aspects of demand for land uses that might be appropriate for future development in the study areas and quantifies the potential scale and timing of these uses.

The study areas include:

Village Place/Rattlesnake Trail: Approximately 100 acres in size and represented by 70 different parcels, this area is immediately north of the historic center of the community and stretches out to NC 211.

Pinehurst South: Also known as the Highway 5 Commercial Area, Pinehurst South is an approximate 290 acre limited growth and redevelopment area on the Village's south side containing approximately 145 parcels.

Methodology

In order to assess the future opportunity in the Village and study areas, Duggal Real Estate Advisors completed the following tasks:

Site Analysis: Duggal Real Estate Advisors completed a review of the Village Place and Pinehurst South planning areas from a market perspective. We visited the subject areas and assessed them in terms of strengths, weaknesses, opportunities, and threats (SWOT) relative to location, site characteristics, surrounding land uses, access, planned redevelopment potential, and others.

Economic and Demographic Analysis: We analyzed local and regional demographic and economic data to understand the potential for each of the land uses in the study areas. The goal was to assess the growth potential of the overall market area that will drive demand for future land uses in the planning areas.

Competitive Supply Analysis: We completed an overview of the market for for-sale and for-rent residential, office, retail, hotel, and golf in order to make reasonable assumptions about the market. The competitive supply analysis is completed in order to understand how competitive and comparable properties and projects are performing in order to help understand the market potential in the subject areas.

Demand Analysis: We determined the likely demand for for-sale and for-rent residential, office, retail, hotel, and golf land uses. This portion of the market study is forward looking, and determines the demand for the subject areas based upon projected future growth in the area. The output of the demand analysis is a range of likely capture of the overall market demand that leads to absorption in the subject areas.

Stakeholder Interviews: Duggal Advisors participated in interviews with knowledgeable real estate and economic development professionals to understand the opportunity for various land uses in the market.

Innovation Hub Analysis: Envision the Village called for an Innovation Hub at Pinehurst South. At a high level, we analyzed the potential for an Innovation Hub for the Pinehurst Small Area Plan. We utilized information from the Brookings Institute and others to compare the "necessary ingredients" for an Innovation Hub relative to the Pinehurst area.

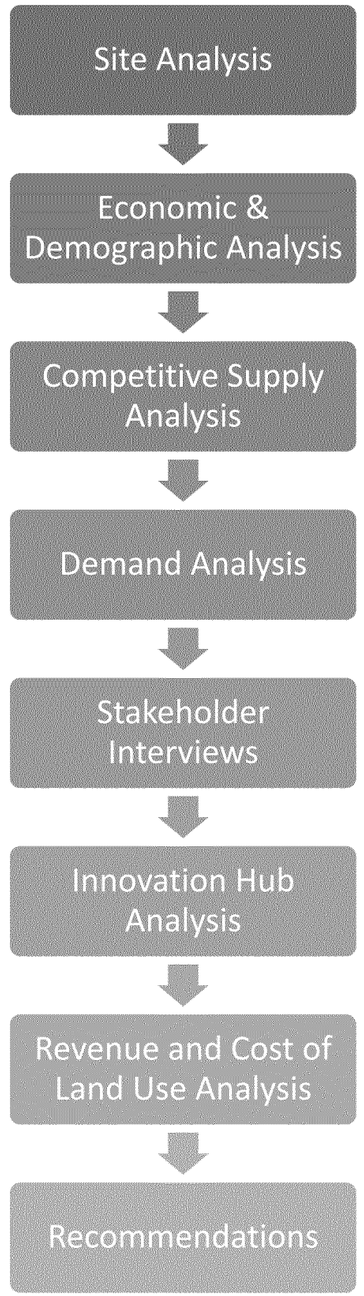
Revenue and Costs of Land Uses Analysis: A future step in the process is to determine the revenue and the costs of added service and infrastructure on the potential plans and market opportunities. We plan to use the FY 2017 Land Use Fiscal Analysis completed by the Village of Pinehurst.

Recommendations: We provided recommend-dations on the feasibility of land uses within the study areas. We provided a development strategy that takes into account a range of possible market scenarios. A future step is to help the Planning Team craft realistic plans for the planning areas.

We utilized projections and information supplied by others and gathered by ourselves. We assume this information is complete, correct, and reliable. Any projections regarding the future are the best estimate from the date they were prepared. Projections, by their nature, are best estimates of the future, and inevitably will be inaccurate to some degree.

We assume the economy and real estate markets will continue to grow as projected. Real estate markets are cyclical, so there are bound to be times within the planning timeframe that the market performs better (boom) or worse (downturn) than projected. Over the course of the study period, we assume the average annual growth projected will materialize.

This report was prepared by Melina Duggal, AICP of Duggal Real Estate Advisors, LLC. The data was collected in November and December 2020 and January 2021.



Duggal Real Estate Advisors completed a site analysis for the Village Place area based upon market issues. These strengths, weaknesses, opportunities, and threats (SWOT) are shown in the figure below.

Overall, Village Place offers a strong opportunity to develop a variety of land uses. Drawing upon the Village Center as inspiration, Village Place can complement what is already part of the community.

Strengths

- Location close to Village Center provides a strong foundation
- Community Center, Cannon Park, Rassie Wicker Park & Village Arboretum
- Walkable to Village Center
- Large number of amenities
- Strong brand of Pinehurst
- Some redevelopment already occurring (Pinehurst Brewery)

Weaknesses

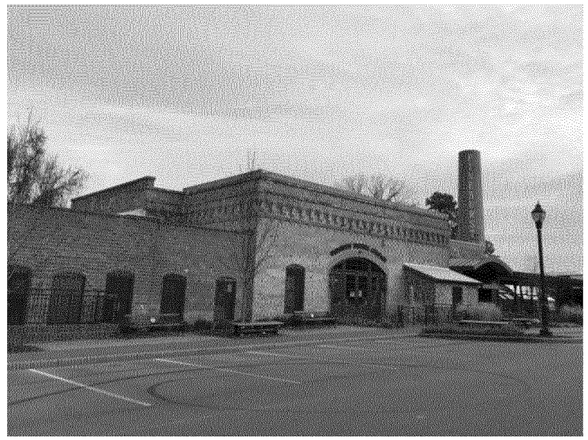
- Some of the properties are older
- Parking challenges
- Limited amount of available land

Opportunities

- Build off the success of historic Village Center
- Growth in nearby neighborhoods
- Redevelopment of Public Services and Moore County Utilities water tank sites
- Redevelopment of older properties
- Close to NC 211 – enhance character and attractiveness of intersection area

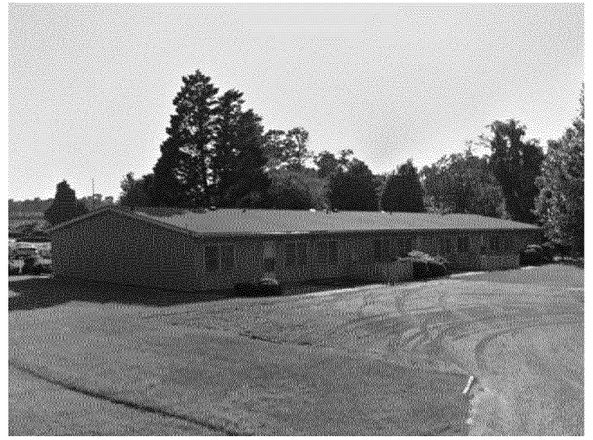
Threats/Challenges

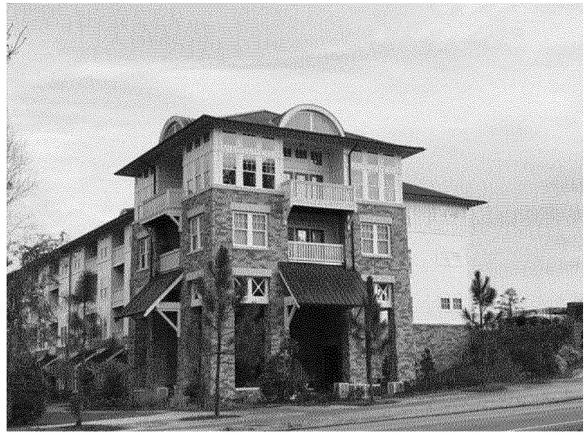
- Inability to create a strong direct link between Village Core and Village Place
- Challenge of moving the Moore County Utilities water tanks and Public Services
- Small developed parcels and multiple property owners could make site acquisition & redevelopment challenging


Pinehurst Brewing Company


Old Fire House


Community Center


The Village Quarters


The Greens at Arboretum


Single-family detached home

Duggal Real Estate Advisors completed a site analysis for the Pinehurst South area based upon market issues. These strengths, weaknesses, opportunities, and threats (SWOT) are shown in the figure below.

Overall, Pinehurst South is best suited for residential and office uses. Hospitality could be an option as well. Large-scale retail would be challenging given the access issues, but locally-serving retail would be viable.

Strengths

- Land availability
- Natural character and trees
- Direct access to Pinehurst Resort via NC 5
- New development in area including the new post office
- Strong businesses in area (such as Quail Haven Retirement Village)

Weaknesses

- No common theme to buildings
- Unrelated land uses
- Traffic issues
- Lack of cohesion/consistent character within area

Opportunities

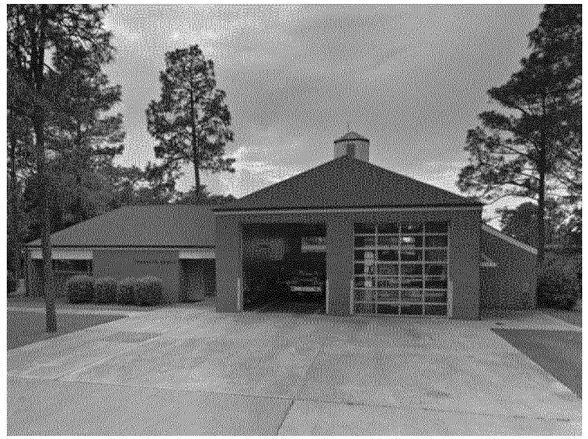
- Capitalize on growth along NC 5
- Concentration of public and semi-public services (post office, fire station, VA services)
- Create a distinct identity for area
- Build off of USGA
- Infill development

Threats/Challenges

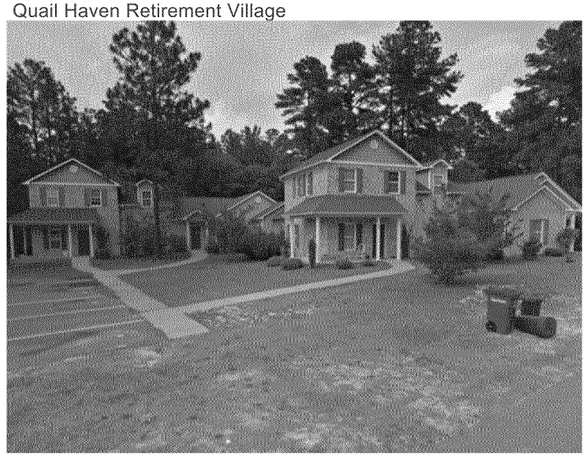
- RR crossings & limited access
- Significant amount of vacant land south of the study area along NC Hwy 5 that could take demand potential away



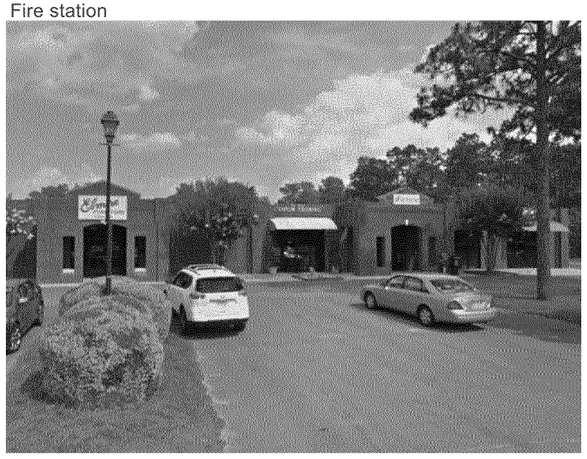
Quail Haven Retirement Village



Fire station



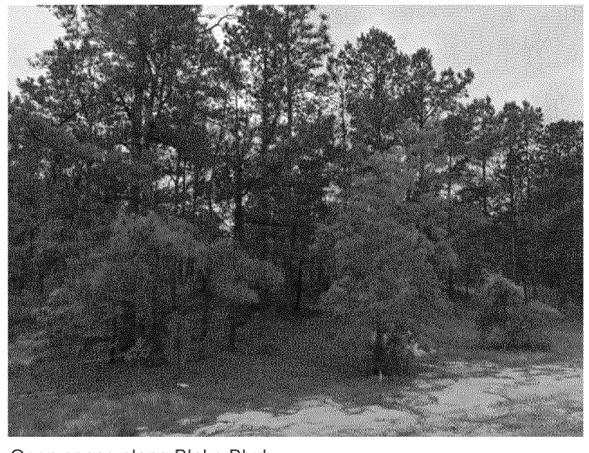
Abingdon Square Townhomes



Retail



Veterans Guardian Claim Consulting



Open space along Blake Blvd.

MARKET ANALYSIS

RECOMMENDATIONS

Summary of Market Opportunity

For the market analysis, we examined six different land uses: for-sale residential, for-rent residential, retail, office, hospitality, and golf. The following is a summary of the opportunity for each of the land uses in the Village of Pinehurst and the planning areas.

The overall market opportunity takes into account the current and projected future market conditions, future demand potential, and the suitability for the land use within the Village.

Land Use	Overall Market Opportunity	Village Place	Pinehurst South
For-Sale Residential	XXXXX	XXXX	XXXX
For-Rent Residential	XXX	XXX	XXX
Retail	XXXX	XXX	XXX
Office	XX	XX	XX
Hospitality	XXX	XXX	XXX
Golf	XX	O	X

Key: XXXXX = best, X = worst, O = none

Summary of Demand

For each of the land uses, we completed a demand model to understand the future potential of the land use within the Village or Moore County, depending on the land use.

To determine how much of each land use would likely locate within the planning areas, it was necessary to consider where else within the Village the land use could be located. For example, if there is demand for one rental project every three to eight years within the Village, it can't be located in both planning areas, but in reality, it could be located in either one or another location in the Village, making it difficult to assign demand.

For many land uses, there has been and will be more demand for the product type within the Village than the amount of supply that has been or will be available (e.g. more houses would likely sell if they were available).

Land Use	Demand Potential	Locations within Pinehurst
For-Sale Residential	80-130 homes/year	Almost anywhere
For-Rent Residential	15-25 units/year	Major roads, VP, PS, Village Cntr
Retail	20-25,000 SF/ every 5 years	Major roads, VP, PS, Village Cntr
Office	Up to 5,000 SF/year	Medical area, VP, PS, Village Cntr
Hospitality	25 rooms/yr. in Moore Co.	Resort, Village Cntr, PS, VP
Golf	2-3 courses over the next 10 years in Moore Co.	Focus Area 1 is the only area with space

Summary of Demand for Land Uses within Planning Areas

We then considered how much of the demand could be located within the planning areas if the area was zoned for it, landowners were interested in selling, and developers would build it. While the market analysis quantifies realistic development opportunities, actual land use allocation will be guided by planning exercises, vision and community and stakeholder input in balance with market demand.

The potential for most of the land uses is present in both planning areas.

Although there is some flexibility in these numbers as stated before, we have put together guidelines based upon the market to help the planning team understand the magnitude of demand in each of the planning areas.

Land Use	Village Place	Pinehurst South
For-Sale Residential	Unlimited at build-out* 1 project would sell approximately 15-25 homes per year	Unlimited at build-out* 1 project would sell approximately 15-25 homes per year
For-Rent Residential	At build-out*, 1-2 projects of 70-100 units each Timing depends on where else apartments have been constructed (e.g. Village only has demand for 1 project every 3 -8 years)	At build-out*, 1-2 projects of up to 200 units each, depending on location Timing depends on where else apartments have been constructed (e.g. Village only has demand for 1 project every 3-8 years)
Retail	25,000-50,000 SF at build-out*	Up to 80,000 SF with grocery, 40,000 SF without grocery at build-out*
Office	25,000 – 30,000 SF at build-out* Limited amount per year. 5,000 SF total in Village. Village Place could capture some of that, but likely less than Pinehurst South	Up to 100,000 SF at build-out* Limited amount per year. 5,000 SF total in Village. Pinehurst South could capture some of that. Could increase, depending on impact of USGA
Hospitality	At build-out*, 1 hotel with 75-100 rooms as well as bed and breakfasts	At build-out*, 1 hotel with approximately 100 rooms
Golf	None	Possibly some support functions (although the land probably has a higher and better use than maintenance for golf)

** Build-out refers to when land availably within the study areas is gone. Given the large areas and nature of (re)development, we cannot determine when the areas will be "finished". The build-out provides the planning team and public an idea of what would likely be the maximum possible for each land use taking into account product demand, land availability, suitability of land use, planning, vision, etc.*

Land Use	Summary of Market Conditions	Future Demand Potential	Product/Tenant Types	Preferred Location	Suitability for Village Place	Suitability for Pinehurst South
For-Sale Residential	• Building permits have been rising in Pinehurst, suggesting an uptick in the new for-sale housing market • The resale market has remained relatively steady • Many new homes are scattered throughout existing golf course communities • New homes within non-golf smaller subdivisions tend to be less expensive and generally range from $250,000 to $400,000 • New homes within golf master-planned communities tend to be more expensive and range from $300,000 to over $1 million	• Strong demand potential from local buyers, military buyers, and second home buyers • There is demand for approximately 80-130 new homes per year in the Village (which may or may not be realized). Some years will have more and some will have less, but are likely to average 100 new homes per year	• Approximately 12% of owner-occupied homes in Pinehurst have children in them • The majority of owners in Pinehurst (almost 70%) are married couples without children, and of these, 65% are over the age of 65 • Buyers are reported to be a mix of military families from Fort Bragg, children of current owners, commuters, and retired and second home owners	• Owners like to be near services and amenities. Walkable locations are desired. Golf course communities are popular • Depending on the age and make-up of owners, schools can be an important factor as well	**Strong** Small lot SFD Attached product Mixed-use **Medium** Multifamily	**Strong** Small lot SFD Attached product **Medium** Mixed-use Multifamily
For-Rent Residential	• The majority of rental product in Pinehurst is single-family detached • Rents have been steadily rising in Pinehurst • Apartment complexes are 95% occupied on average • The majority of renters pay between $1,000 to $2,000 in rent	• The majority of households in Pinehurst own their homes (85%), so demand for rental product is lower • There is demand for approximately 15-25 new units of rental housing per year in the Village	• Approximately 27% rental units in Pinehurst have children in them • Rental apartments would likely appeal to a younger demographic without children. They are typically 1 and 2 person households • Rental townhomes would likely appeal to family renters	• Renters like to be near services and amenities. Walkable locations are desired. • Depending on the age and make-up of renters, schools can be important as well as nightlife	**Strong**	**Strong**
Retail	• Overall a strong retail market with low vacancy rates • Currently some challenges due to Covid-19 • This is likely a short-term issue • Almost half of the retail in the Village is restaurants. This includes a variety of sit down and fast casual establishments	• Strong demand potential tied to future household growth • Much of the retail is outside of the Village limits. There is even leakage outside of Moore County for certain categories • There is demand for 20-25,000 square feet of retail every five years in the Village – often this is captured by surrounding communities	• Retail most in demand includes auto parts and accessory stores, furniture stores, building material stores, health & personal care stores, gas stations, clothing stores, sporting good stores and restaurants	• Retailers want centralized, visible, accessible and appropriate locations • Local retail (Neighborhood Goods & Services and Food & Beverages): near households • Regional retail (General Merchandise, Apparel, Furnishings & Other): along US 15-501, NC 211, and US 1	**Strong** Small, locally-serving Boutique Restaurant **Medium** Convenience	**W of Hwy 5** Future neighborhood-serving (drugstore, grocery possible) Restaurant **E of Hwy 5** Limited to serving residents and workers (restaurant, café)
Office	• The market is currently doing fairly well. It is reported to be well-occupied, and lease rates are stable	• There is limited demand for future office space at up to 5,000 square feet per year	• Medical, professional service, locally serving	• Tenants enjoy areas with services and amenities and good access. Some enjoy being in walkable areas	**Strong** Locally-serving, small	**Strong** Locally-serving Medical Office park
Hospitality	• The current hospitality market is suffering due to Covid-19. Although leisure guests have remained and possibly even increased, the group business is completely gone • This is likely a short-term issue • Post Covid-19 should go back to a very healthy hospitality market	• Future demand potential is based upon the growth in tourism as well as business and medical travel • We estimate the demand for approximately 25 new hotel rooms per year in the Pinehurst market area (Moore County). Some of this could locate in Pinehurst	• Hotels and bed and breakfast establishments	• Hotels vary in their location decision criteria. Hotels catering to tourists want to be near the attraction (ocean, theme park). In this case, the attraction is golf • Hotels attracting businesses would like to be located near employment, amenities, and major highways	**Strong**	**Medium**
Golf	• Total on-course golf participation has remained relatively stable in the US • There has been an uptick in golf rounds played in Pinehurst area since Covid restrictions have eased • Market is currently performing well in the Pinehurst area	• Demand for golf should remain moderately strong in the area. There could be demand for up to 2-3 new golf courses in the overall area in the next 10 years • The area is well-known for golf, and the addition of the USGA's Golf House Pinehurst and five US Open Championships, should increase future demand	• There appears to be an increase in the demand for 9 hole courses across the country	• In the Pinehurst, Aberdeen, Southern Pines area • Near other courses	**Not Suitable**	**Possible** Back of house operation

Village Place

For-Sale Residential

- Would likely be infill development or part of a small, mixed-use development.
- Most likely small lot single-family detached or attached product. Attached product would include both townhome style and condominium style product.
- The demand for this product is deep, and the planning area can support as much for-sale product as desired.
- Pricing would vary based upon product type and positioning, but would likely be in the range of $300,000 to $500,000.

For-Rent Residential

- Could either be stand-alone or within a mixed-use project. Would likely be horizontal mixed-use as opposed to vertical mixed-use (e.g. the apartments are next to the retail and office, not above) given the rent ranges possible to achieve and the cost of construction. If rents rise to support residential over commercial, that would be an appropriate land use here as well.
- Most likely size of an apartment complex would be similar to The Greens (70-100 units).
- Rents would be similar to the newest apartments at the time of construction. At this point, the newest apartments in the market are The Greens at approximately $1.35/SF. At an average size of approximately 1,000 square feet, that would equate to a rent of approximately $1,350 per month.

Retail

- The retail would not be in the form of a stand-alone shopping center, unless the retail was located along NC 211. Given the current uses, it is unlikely that there would be a shopping center in the planning area along NC 211.
- The retail would be part of a mixed-use area or more small retail shops like currently exist along Rattlesnake Trail.
- The demand for retail is more limited in this configuration, and would be limited to 25,000 to 50,000 SF total at build-out.
- Rents would need to be $24-$30/SF to support new construction.
- Tenants would include those that support local residents and tourists (such as flower shops, gift shops, pharmacies, home goods, salons, restaurants, shoe stores, boutiques, and others). The demand is strong for a variety of retail shops.

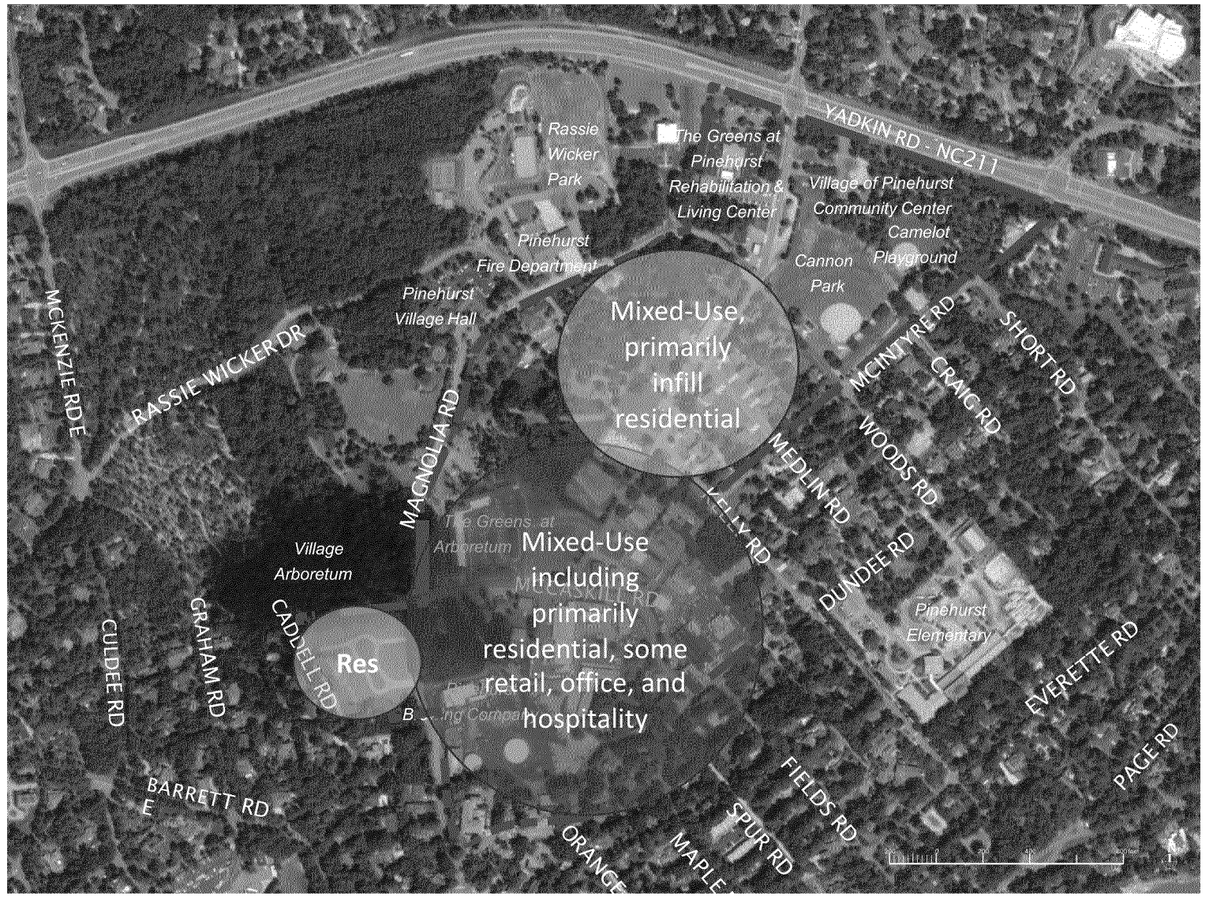
Office

- Office would be a supportive land use to the mixed-use area. It would be small offices, primarily locally-serving, including medical office.
- Given the amount of retail that could happen, we would anticipate the office to be less than or equal to the amount of retail, therefore, we would anticipate 25,000 to 30,000 SF of office at build-out.
- Rents would be in the $18-$22/SF range.

Hospitality

- Village Place could support a hotel as well as bed and breakfasts. They would likely support tourists, and potentially people visiting the hospital.
- Hospitality could also include rental product within homes.
- New hotels in the area tend to have 75-100 rooms. Bed and breakfasts and similar tend to have far fewer rooms, typically less than 10.

Possible Generalized Location for Land Uses Based upon Market Study



Pinehurst South

For-Sale Residential

- Likely a stand-alone residential community as opposed to mixed with other product.
- Given land availability, could have 1-2 projects. Each would be 30-50 units. However, the demand for this product is deep, and the planning area can support as much for-sale product as desired.
- Could be either single-family detached or attached product.
- Pricing would vary based upon product type and positioning, but would likely be in the range of $250,000 to $450,000.

For-Rent Residential

- Could be either a stand-alone larger community (typically larger, 150-200 units) or integrated into a mixed-use area.
- Integrated into a mixed-use area, the apartments would still likely be horizontal mixed-use (e.g. the apartments are next to the retail and office, not above). This would likely be a smaller project (80-120 units).
- Rents would be similar to the newest apartments at the time of construction. At this point, the newest apartments in the market are The Greens at approximately $1.35/SF. At an average size of approximately 1,000 square feet, that would equate to a rent of approximately $1,350 per month.

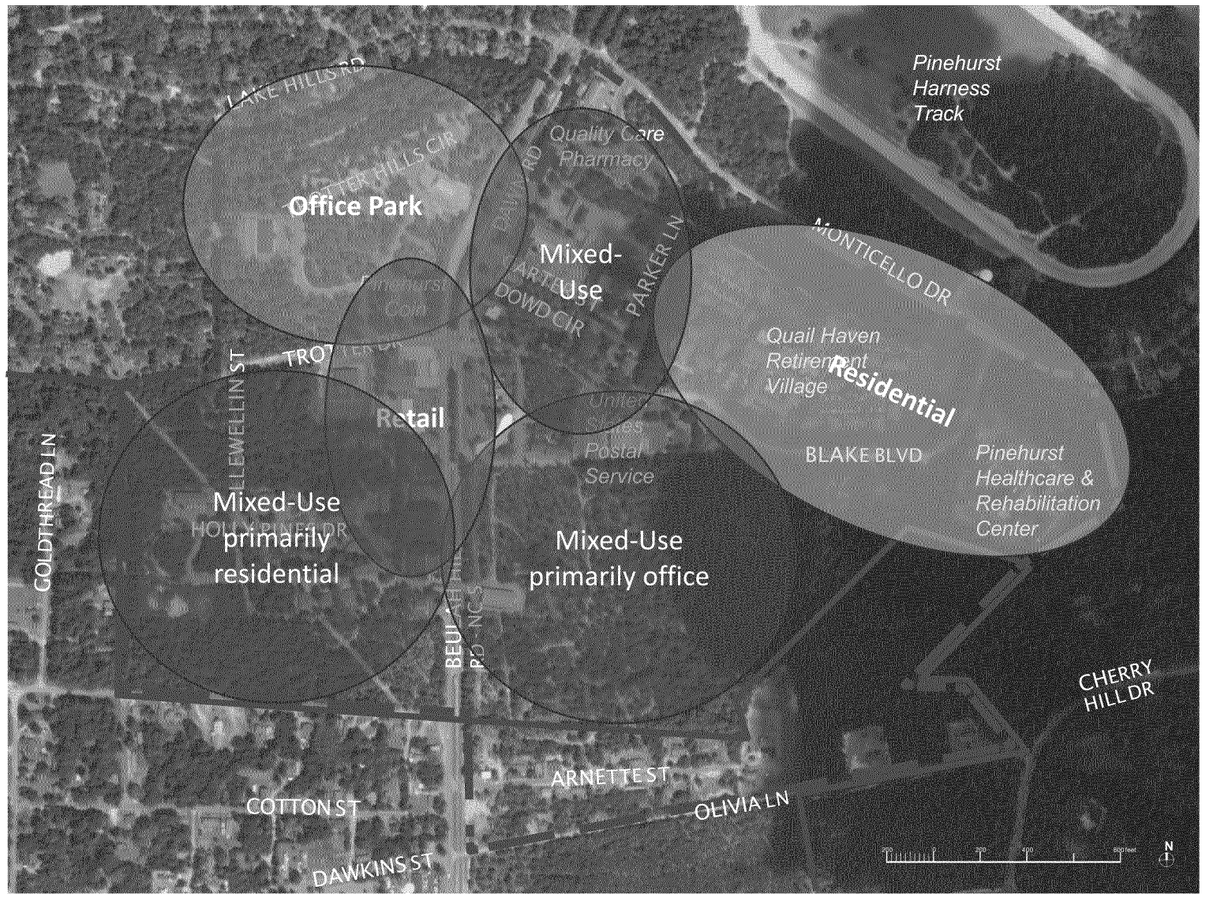
Retail

- Any retail would prefer to be located and accessed off of NC 5. If a project were created on the east side of NC 5, it would still be important to have NC 5 visibility.
- Could be a stand-alone shopping center on the west side of Hwy 5. This would depend on having an anchor within the project such as a grocery store or drug store. The size of the center would depend on what type of anchor, ranging from 50,000-80,000 SF in size total. This would likely not materialize for some time as the area continues to develop and mature.
- There is also demand for retail on the east side of NC 5. Due to access issues, it would be small-scale, and just to support local businesses and residents. There would likely be less than 10,000 SF total.
- If there was a shopping center on the west side of NC 5, the retail on the east side would be more limited, and vice versa.
- Any retail located within Pinehurst South would be locally serving.
- The maximum amount of retail in the area is likely to be 80,000 SF with a grocery store, and less than 40,000 SF without a grocery store at build-out.
- Rents would need to be $24-$30/SF to support new construction.

Office

- Office could either be like the product available at Turnberry (small format, 1-2 story) or integrated into a mixed-use center.
- Although there is not a lot of office demand annually, given the limited amount of office land available in other areas, this would be an appropriate location to save land for future office use.
- Even at 2,000 SF of office per year, in 50 years, the total amount would be 100,000 SF.
- Tenants and owner-occupied space would be a collection of medical, locally-serving professional services, and potentially related to the USGA.
- Rents for office would be in the $18-$22/SF range.
- Part of the area could be a modified Innovation Hub – meaning it could be planned to attract and facilitate companies and technologies related to golf, but be willing to accept other industries and users as well.

Possible Generalized Location for Land Uses Based upon Market Study



Hospitality

- The planning area could support a hotel if it were part of a mixed-use area. If there were enough businesses, it could support the workers in the area. Otherwise, it would likely support tourists. Type of hotel depends on place creation.
- A new hotel would likely have around 100 rooms.

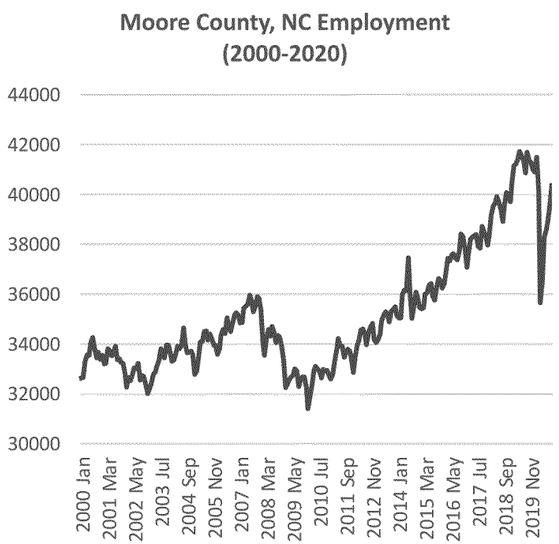
MARKET STUDY

ECONOMIC AND DEMOGRAPHIC ANALYSIS

Economic Analysis

The United States officially started a recession in March 2020 due to the Covid-19 pandemic. This ended the expansion in the economy since the end of the Great Recession in June 2009. Moore County experienced significant and steady employment growth during this period of expansion, climbing from approximately 31,000 jobs in January 2010 to 42,000 jobs in June 2019. Just like the rest of the country, jobs dropped swiftly due to Covid-19 from 41,489 in February 2020 to a low of 35,661 in April 2020.

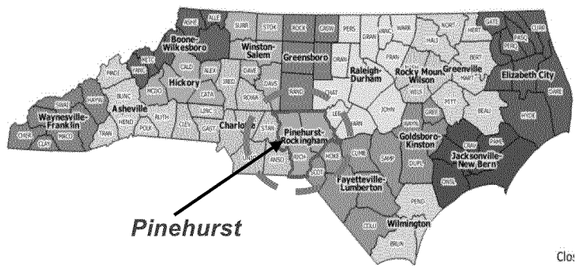
Since that time, jobs have recovered almost to pre-Covid levels to 40,352 jobs in October 2020. While the exact duration of the Covid-19 epidemic is unknown, vaccines, as of December 2020, are just beginning to role out to the country. The timing of the full recovery is unknown, but economists view the vaccination of the population as a good sign for recovery.



Source: BLS

Pinehurst Village and Moore County are part of the North Carolina Department of Commerce, Labor & Economic Analysis Pinehurst-Rockingham region which includes Moore, Montgomery, and Richmond Counties. Of these three counties, the majority of the employment is located within Moore County within the Pinehurst-Aberdeen-Southern Pines area. Employment projections are made by industry at this planning area level.

Map of North Carolina by NC Department of Commerce Regions



Source: North Carolina Department of Commerce, Labor & Economic Analysis

The outlook for employment is relatively strong overall with an average annual growth rate of approximately 0.6% or approximately 350 new jobs per year. Over the ten-year period from 2017 to 2026, the highest growth industries within the planning area are projected to be: Health Care and Social Assistance (avg. weekly salary of $937), Accommodation and Food Services (avg. weekly salary of $322), Retail Trade (avg. weekly salary of $480), and Construction (avg. weekly salary of $883).

Overall, the employment growth rate projected for the region (approximately 0.6% per year) is less than the overall employment growth rate projected for the state (approximately 0.9% per year). However, 350 new jobs are projected annually in the region. Given the concentration of health care within Pinehurst, it is likely much of this job growth will be located within the Village. The employment within the Village is not very diversified.

The largest concentrations of jobs in Pinehurst are Health Care and Social Services (52%) and Accommodation and Food Services (25%). These industries are expected to grow, thereby bringing additional jobs to the Village.

Jobs by Industry in Pinehurst (2020)

Industry	Businesses	%	Employees	%
Health Care and Social Services	575	54%	5,880	52%
Accommodation and Food Services	42	4%	2,839	25%
Other Services - Repair, Personal Care, Laundry, Religious, etc.	69	6%	434	4%
Professional, Scientific, and Technical Services	58	5%	396	3%
Arts, Sports, Entertainment, and Recreation	23	2%	358	3%
Retail: Home, Food, Automobiles, Personal Care	35	3%	262	2%
Education	11	1%	257	2%
Real Estate and Rentals	47	4%	234	2%
Public Administration	12	1%	173	2%
Banking, Finance and Insurance	56	5%	145	1%
Construction	25	2%	89	1%
Information	12	1%	85	1%
Other	108	10%	248	2%
Total	**1,073**	**100%**	**11,400**	**100%**

Source: North Carolina Department of Commerce, Labor & Economic Analysis

In order to create more office space, it would be important to try to diversify the jobs in Pinehurst. Jobs that typically lead to the demand for office space include: Health Care and Social Services; Professional, Scientific, and Technical Services; Other Services, Real Estate and Rentals, Banking, Finance and Insurance; and Information. As stated above, the likely job growth in the health care sector will lead to demand for medical office space. There is some job growth projected in the other industries that leads to the demand for standard office space.

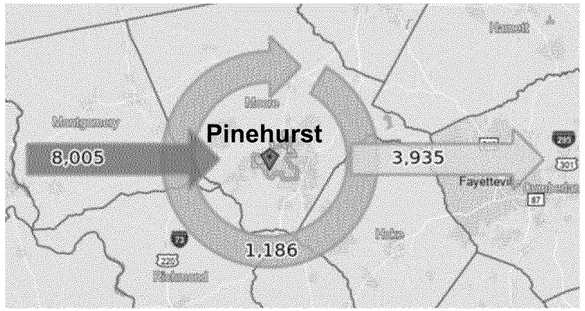
Additional economic (job) data is provided in the Appendix.

Commuter Analysis

Commuting data is available for both where people work and where workers live. Approximately 8,000 people commute into Pinehurst to work, 1,200 both live and work in Pinehurst, and 4,000 leave Pinehurst to work somewhere else.

The 8,005 people that come into Pinehurst everyday for work and the 4,000 people that leave for work represent an opportunity to "capture" them in Pinehurst to help reduce traffic and create more mixed-use environments.

Inflow and Outflow of Workers in Pinehurst (2017)



Source Census on the Map

People Who Work in Pinehurst (Where Workers in Pinehurst Live)

Of the people that work in Pinehurst, approximately 50% of them are aged 30-54, while 32% are over the age of 55, and 18% are under the age of 29.

Almost half of the workers make more than $3,333 per month. Over 50% of the workforce has some college, an Associates degree, Bachelor's degree or higher.

People who work in Pinehurst come from the surrounding communities. Approximately 56% of workers in Pinehurst live in Moore County, followed by 9% from Richmond County, and 5% from Hoke County.

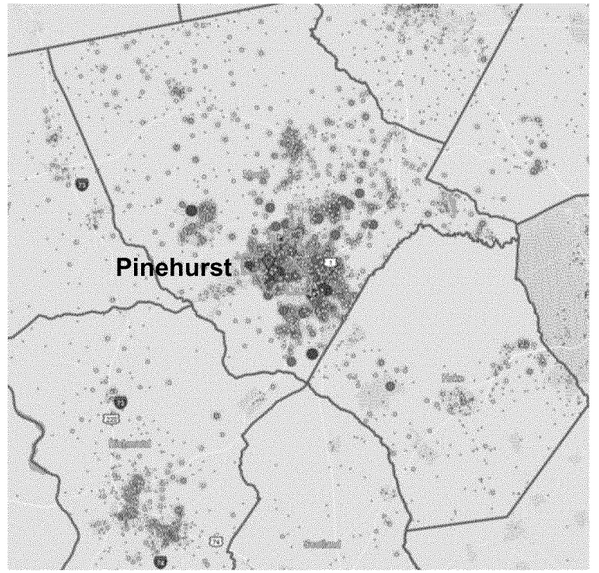
This is a fairly high capture of people who live and work in the same county. Moore County functions as the center of the economic region, so many people who live there also work there.

Job Counts by Counties Where Workers Live – All Jobs (2017)

	Count	Share
Moore County, NC	5,167	56%
Richmond County, NC	832	9%
Hoke County, NC	444	5%
Lee County, NC	339	4%
Montgomery County, NC	290	3%
Cumberland County, NC	283	3%
Harnett County, NC	249	3%
Scotland County, NC	188	2%
Wake County, NC	165	2%
Robeson County, NC	80	1%
All Other Locations	1,154	13%
All Counties	9,191	100%

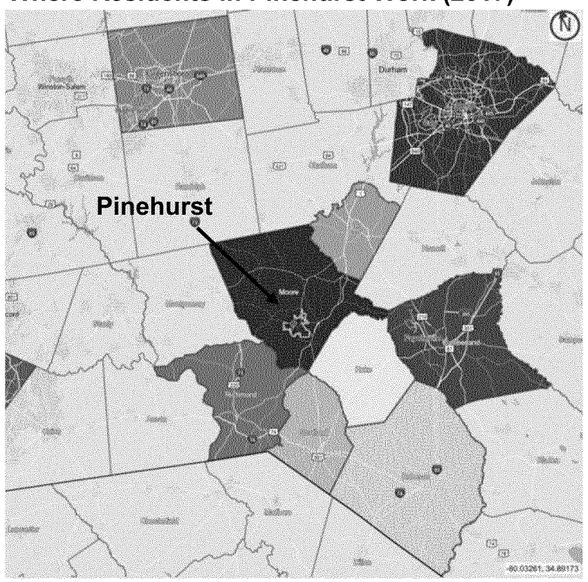
Source Census on the Map

Where Workers in Pinehurst Live (2017)



Source Census on the Map

Where Residents in Pinehurst Work (2017)



Source Census on the Map

Where Residents of Pinehurst Work

People who live in Pinehurst also tend to work in Moore County (57%). It is important to note that the Census on the Map data does not include uniformed military workers, and therefore would not include any potential workers at Fort Bragg in this analysis. The next largest group of residents work in Wake County/Raleigh area (6.8%), followed by Cumberland County/Fayetteville area (4.9%), and Mecklenburg County/Charlotte area (3.6%).

Job Counts by Counties Where Workers Are Employed – All Jobs (2017)

	Count	Share
Moore County, NC	2,897	57%
Wake County, NC	347	7%
Cumberland County, NC	253	5%
Mecklenburg County, NC	183	4%
Richmond County, NC	123	2%
Guilford County, NC	102	2%
Lee County, NC	77	2%
Scotland County, NC	76	2%
Robeson County, NC	71	1%
Hoke County, NC	65	1%
All Other Locations	927	18%
All Counties	5,121	100%

Source Census on the Map

Demographic Analysis

As of 2020, Moore County has approximately 44,000 households or roughly 1% of the state households. Household growth is anticipated to grow at a pace of 300 households per year until 2025. This household growth will drive the demand for housing and retail in the county.

Pinehurst has approximately 7,900 households or 18% of Moore County households. The Village is expected to grow by approximately 43 households per year over the next five years. Pinehurst is expected to experience less than its "fair share" of growth over the next five years. Although Pinehurst represents 18% of the households now, it is projected to capture only 14% of the growth. Part of this is due to the lack of available land and the cost of new housing compared to other areas.

Driven by employment growth and the desirability of Pinehurst as a second home and retirement destination, household growth will bolster demand for housing as new households move to the area seeking jobs or a lifestyle choice.

A variety of demographic data were analyzed to understand the make-up of Pinehurst Village residents and how they compare to surrounding areas.

Pinehurst has a much larger percentage of people over the age of 65 than comparison areas. This is not surprising given the Village is made-up of a large number of golf courses, resort-style communities, and is a popular destination for retirement and second homes.

Pinehurst also has a higher percentage of households that make over $100,000. They have a relatively low percentage of households with incomes under $30,000. This is consistent with the housing prices and age of the households in the Village.

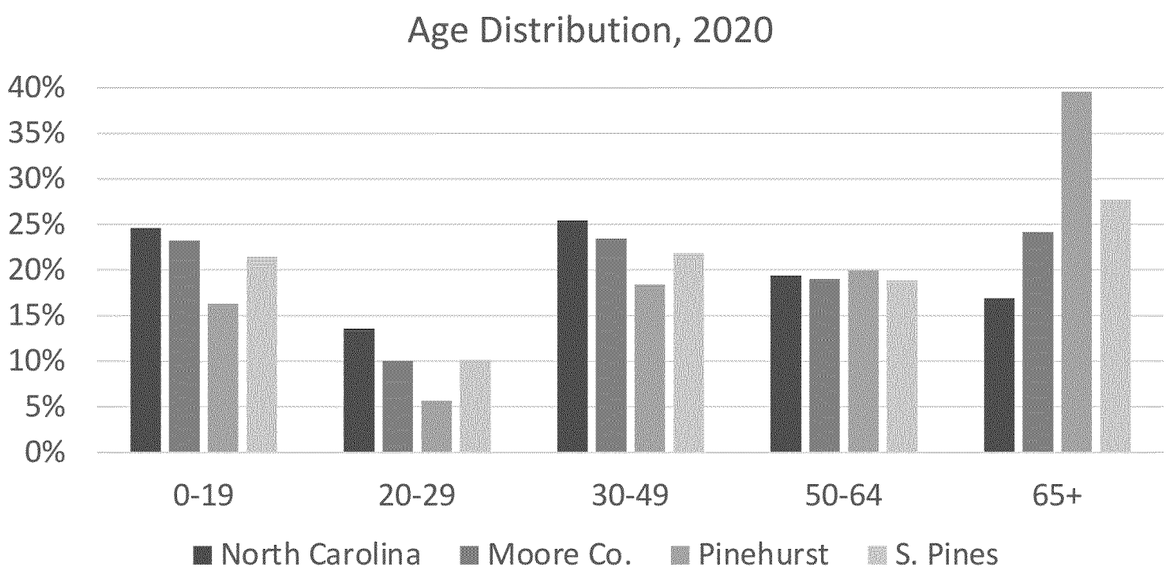
The vast majority (87%) of the households in Pinehurst are White (non-hispanic).

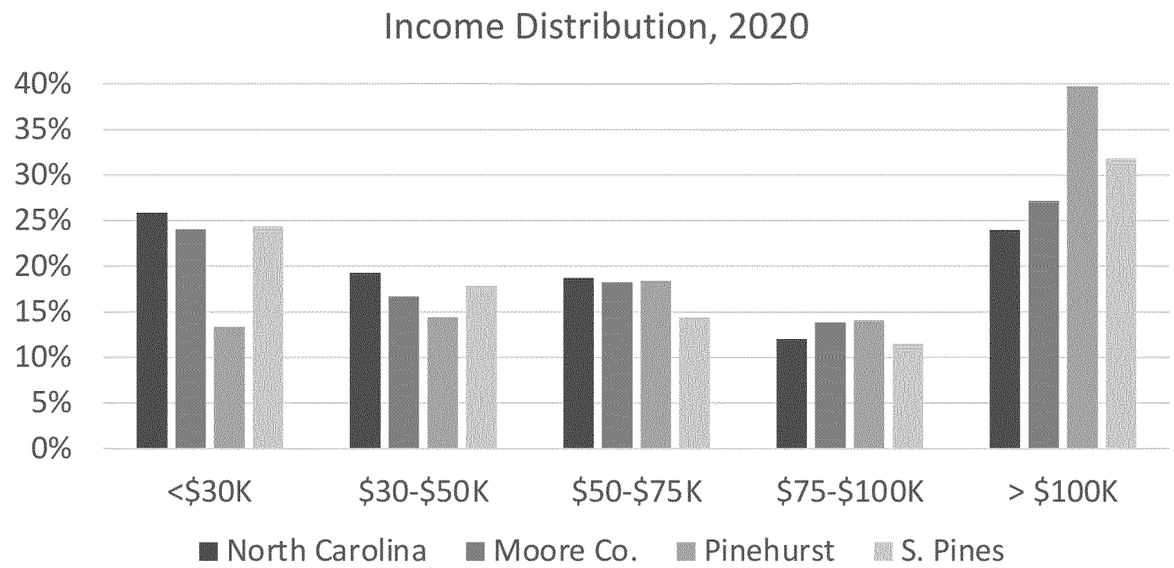
Additional demographic charts are provided in the Appendix.

Household Data for NC, Moore County, Pinehurst, and Southern Pines (2020-2025)

Geography	2020	2025	Growth	Annual Growth Rate
North Carolina	4,341,543	4,494,724	153,181	0.7%
Moore County	43,651	45,169	1,518	0.7%
Moore Co. as % of NC	1.0%	1.0%	1.0%	
Pinehurst Village	7,885	8,100	215	0.5%
Pinehurst as % of Moore	18.1%	17.9%	14.2%	
Southern Pines Town	7,142	7,207	65	0.2%
Southern Pines as % of Moore	16.4%	16.0%	4.3%	

Source: AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis



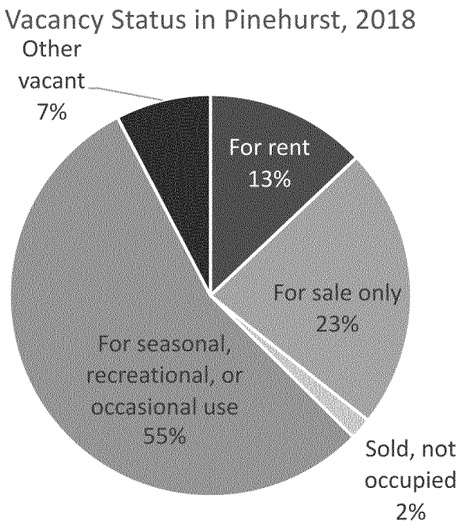


Source: AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis

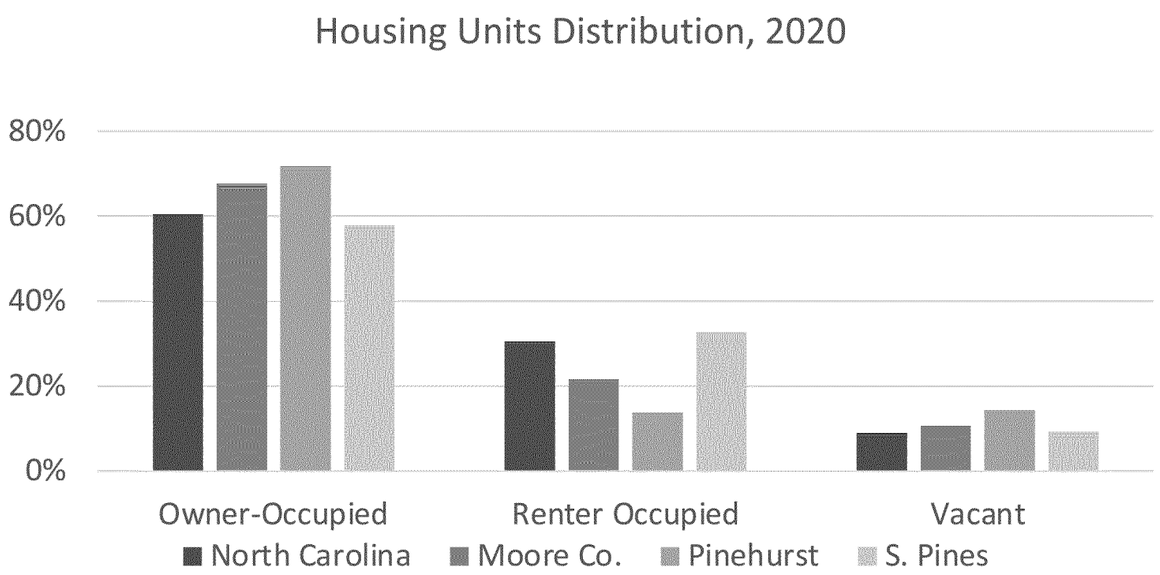
Housing Unit Data from the Census

The majority of the housing units in Pinehurst are owner-occupied (72%). This is higher than all of the comparison areas. Approximately 14% of units are renter-occupied, and 14% are vacant.

Of the vacant units, approximately 55% of them are for seasonal use (a second home). Pinehurst has a fairly large number of second homes.



Source: American Community Survey, 5 year estimates, 2018



Source: AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis

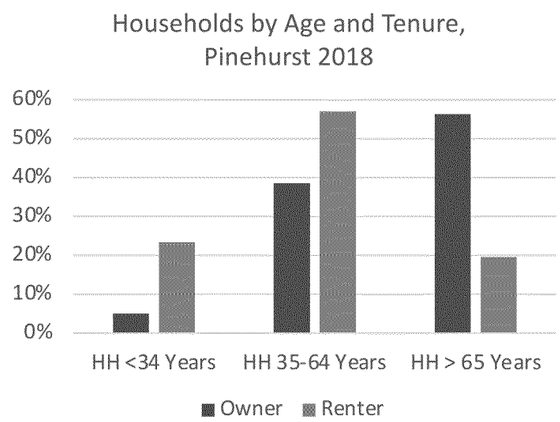
Owner and Renter Data from the Census

The largest group of households in Pinehurst are married couples without kids who own their homes. That group makes up almost half of all households in the Village. The second largest group (almost 25%) are nonfamily households that own. These could be singles or roommates.

These groups are followed by married couples with kids that own their homes (9%) and nonfamily households that rent (8%). These four groups make up nearly 75% of households within the Village.

Approximately 12% of owner-occupied households have children, while 27% of renter-occupied households have children. This is different than most places where owner-occupied housing tends to have more children than renter-occupied housing. This is likely due to the age of the population.

Renter households tend to be younger than the owner-occupied households.



	Owner-Occupied			Renter-Occupied		
	No	% of Owner	% of Total	No	% of Renter	% of Total
Married-Couple w/Kids	665	11%	9%	249	23%	4%
Married-couple w/o Kids	3,476	58%	49%	207	19%	3%
Single Male Headed HH w/kids	45	1%	1%	0	0%	0%
Single Male HH w/o Kids	32	1%	0%	14	1%	0%
Famale Headed HH w/Kids	58	1%	1%	41	4%	1%
Female Headed HH w/o Kids	70	1%	1%	28	3%	0%
Nonfamily HH (single, roommates)	1,679	28%	24%	541	50%	8%
Total	6,025	100%	85%	1,080	100%	15%

Source: American Community Survey, 5 year estimates, 2018

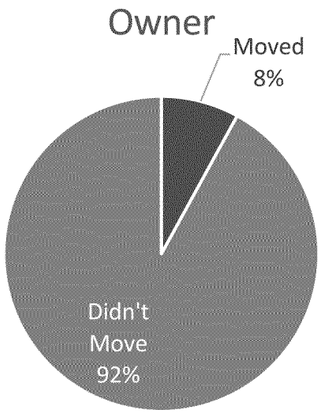
Geographic Mobility Data from the Census

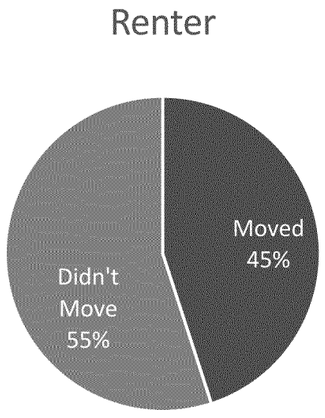
Approximately 8% of owner-occupied households moved in the previous year. This is very similar to the national average of 7.7% of owners moving in the previous year.

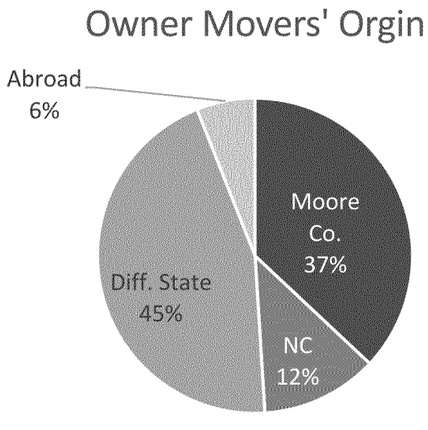
Based upon this data, approximately one-half of new owner households in Pinehurst will come from outside of the state, 40% are moving within Moore County, and 10% from another location within North Carolina.

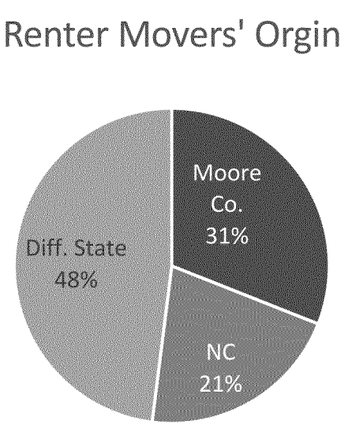
Approximately 45% of renter-occupied households moved in the previous year. This is significantly higher than the national average of 23% of renters moving in the previous year.

Based upon this data, approximately one-half of new renter households in Pinehurst will come from outside of the state, 30% are moving within Moore County, and 20% from another location within North Carolina.









Economic and Demographic Information Summary

The projected job and household growth provides a solid background for the demand for multiple land uses within the Village of Pinehurst. The Village's jobs are concentrated in health care and hospitality and the households are fairly homogeneous.

Jobs in Pinehurst are expected to grow at a stable rate over the next few years. Catalytic events such as the USGA could bring additional, unexpected jobs to the area. The USGA is currently planning on bringing 50 jobs to Pinehurst. In general, the employment in Pinehurst is concentrated in health care, accommodation, and food service.

Almost 60% of the people who work in Pinehurst live in Moore County. The reverse is also true – almost 60% of the residents of Pinehurst that work are employed in Moore County. This is a fairly high capture suggesting Moore County has a fairly insular employment market.

Similar to employment, households are projected to grow at a stable rate in Pinehurst. The typical Pinehurst resident is a married couple over the age of 50, well-educated, affluent, and white.

The majority of residents in Pinehurst own their homes. There is a fairly sizeable amount of second homes in the community as well compared to the national average. People who move to Pinehurst are split between those from outside of the area and state (50%) and those from the area (30-40%).

The economic and demographic data for Pinehurst provides a strong foundation for the demand for additional land uses.

Innovation Districts and Attracting High-Tech Jobs

Innovation Districts are dense, walkable, mixed-use areas that facilitate the creation and commercialization of new ideas. They connect research/technology/anchor institutions with people and companies that can leverage those ideas into new jobs and technologies.

Innovation Districts, no matter how big or small, or whether in a large metropolitan area or a small community like Pinehurst, need to have anchors – such as universities, medical research centers, cultural attractions, etc. They are places where residents can live, work, and play in a vibrant area that fosters creativity and technology transfer. Many smaller communities appear to be trending towards an arts and culture type Innovation District bringing together artists, visitors, and residents.

In the *2019 Comprehensive Plan, Envision the Village*, The Village of Pinehurst had designated Pinehurst South as an "Innovation Hub" that would create "one connected master planned area with a primary focus on office, medical, life science, and research facilities with small-scale supporting retail services… It could also include a residential component as well."

A report published by the Brookings Institute in May 2014 titled, "The Rise of the Innovative Districts: A New Geography of Innovative America" was referenced to identify ingredients necessary for an Innovative District. Current conditions in Pinehurst South were examined to determine the necessary steps to create these ingredients in the area.

Given current conditions, most of the ingredients of successful Innovation Districts are not present in Pinehurst South.

Ingredients for Innovation Districts

Ingredient	Exists in Pinehurst South	Can it be Created?	Necessary Steps to Achieve
Physically Compact	N	Y	• Introduce more density into the areas • Ensure projects help create a strong street experience
Transit-Accessible	N	N	• Not relevant in a geography like Pinehurst
Mixed-Use	N	Y	• While there are a mix of land uses in the study area, the areas are not "mixed-use" • Encourage mixed-use and multiuse development
Presence of Anchor Institution (University or medical)	N	Maybe	• Would need to identify potential anchors. Most likely in Pinehurst would be related to golf or medical
Close to Downtown	N	N	• Cannot change the physical location
Historic Building Stock	N	N	• Historic building stock can't be created, but compatible architecture can be encouraged
Current Location of Technology, Research, Creative Fields, and/or Small Batch Manufacturing	N	Maybe	• Need to create the type of environment where they want to locate (compact, walkable, etc.)
Current Location of Entrepreneurs	N	Maybe	• Need to create cultivators that support entrepreneurs (such as incubators) • Need to create the environment to attract entrepreneurs (edgy, exciting, walkable, mixed-use, etc.)
Location of Cultivators (Incubator, Accelerator, Tech Transfer Offices, Etc.)	N	Maybe	• Would need to create these types of programs and spaces
Neighborhood Amenities (Medical, Grocery, Drug Store, Restaurants, Etc.)	Some	Y	• Encourage this type of development • Support the market when necessary
Public Realm Spaces (Parks, Plazas)	N	Y	• A focal point public realm space would need to be created in Pinehurst South
Availability of Space for Start Up Businesses or Inexpensive Housing	Some	Y	• Relatively inexpensive housing is available near the area • Some available office space
Network Assets (Workshops, Training, Meetings, Breakfasts)	N	Y	• Would need to create a business community for the Pinehurst South area
Collaborative Leadership Network	N	Y	• No specific entity leads Pinehurst South. Would need to get government, medical, business community, landowners, and large tenants together to create network
Clear Vision	N	Y	• Need to finalize the vision and set aside resources to move forward

As shown on the previous chart, creating an Innovation District or Hub is more than just creating the physical space; programming, vision, and the community would need to come together to make it happen.

For Pinehurst, it would make sense to focus on a narrow scope of industries or technologies. Given the jobs and talent currently available in Pinehurst, the golf and tourism markets would likely be most viable. Although there is a concentration of health care in Pinehurst, most of it is health care providers – not research institutions. In addition, it would be hard to compete with large University health care systems to compete for health care technology firms and jobs. Finally, if health care technology or research were to be expanded in Pinehurst, it would be most advantageous to locate it near the current Medical District.

Pinehurst can emphasize its lower cost of living, quality of life, and specialized talent pool. The goal of creating an Innovation Hub would be to capture some of the economic benefits that an innovation economy can deliver while not trying to compete for technology jobs that aren't likely to locate in the area.

The best feature of Pinehurst South with respect to an Innovation Hub is its availability of land and location relatively close to the new USGA facility. The biggest deficits are the lack of an existing anchor institute within the boundaries, a disjointed land use pattern, limited walkability, and low density layout.

The research from the market analysis suggests the following ideas which should be articulated more fully in a vision for the area.

Pinehurst South could be a modified Innovation Hub – meaning it could be planned to attract and facilitate companies and technologies related to golf, but be willing to accept other industries and users as well. The creation of a walkable area with a strong sense of place would be attractive to a variety of users, residents, and visitors.

The market analysis provides the following critical success factors for attracting users to Pinehurst South:

- Create a vision - The intent of this hub is to facilitate new connections and ideas, accelerate the commercialization of those ideas, and support Pinehurst by growing jobs in a way that leverages its distinct economic position
- Create a strong sense of place - Determine the focal point, add other uses, make it walkable, provide a variety of neighborhood amenities
- Make a unique district - Use the existing golf, trees, culture, and quality of life amenities within Pinehurst and determine Pinehurst South's unique attributes
- Create a marketing and branding campaign - Build upon the strong brand recognition of Pinehurst and the USGA
- Improve pedestrian experience – Add sidewalk and places to walk
- Create a business incubator atmosphere – use the affordable housing to draw emerging businesses
- Benefit from the availability of underutilized land and space in Pinehurst South
- Take advantage of current investor and developer interest in NC 5 area
- Increase connectivity - Connect Pinehurst South to the rest of the Village and the surrounding areas to fully leverage nearby assets
- Work with partners – Work with USGA, Pinehurst Resort, Partners in Progress, and others to attract golf companies to the area. Help ensure Pinehurst South is the location for these new companies

Golf Innovation in Pinehurst Area

Partners in Progress, the economic development agency for Moore County, NC recently produced a video on the merits of golf industries and companies relocating to Pinehurst to create a cluster of golf businesses similar to what exists in Carlsbad, California.

The USGA is building a second headquarters in Pinehurst. It will include new offices, an equipment testing center, an innovation hub, and a golf museum/visitor center. Pinehurst South is approximately one mile from this new facility.

In addition to the USGA, Golf Pride opened a Golf Pride Global Innovation Center in 2019 near Pinehurst No. 8, approximately three miles from Pinehurst South. Golf Pride makes grips for golf clubs. The facility includes its management and professional teams, an R&D lab with rapid prototyping capabilities, and a new consumer grip fitting studio.

The area could also leverage the U.S. Kids Golf and the Carolinas Golf Association, both of which have headquarters in the area.

Innovation in Golf

Golf has seen a significant amount of innovation within the game, and is projected to continue to innovate. Some of the innovations include:

- State of the art practice facilities
- Technology to help players improve game
- Equipment
    - Golf clubs
    - Golf balls
    - Shoes
    - Gloves
    - Carts

In Carlsbad, California, there are a variety of golf club equipment companies that are located in the area including Titleist, Callaway Golf, TaylorMade, Cobra/Puma, and others. These companies create synergy and a collection of brain power for the industry. They represent a job cluster in the area. There is a goal to bring a similar cluster to the Pinehurst area.

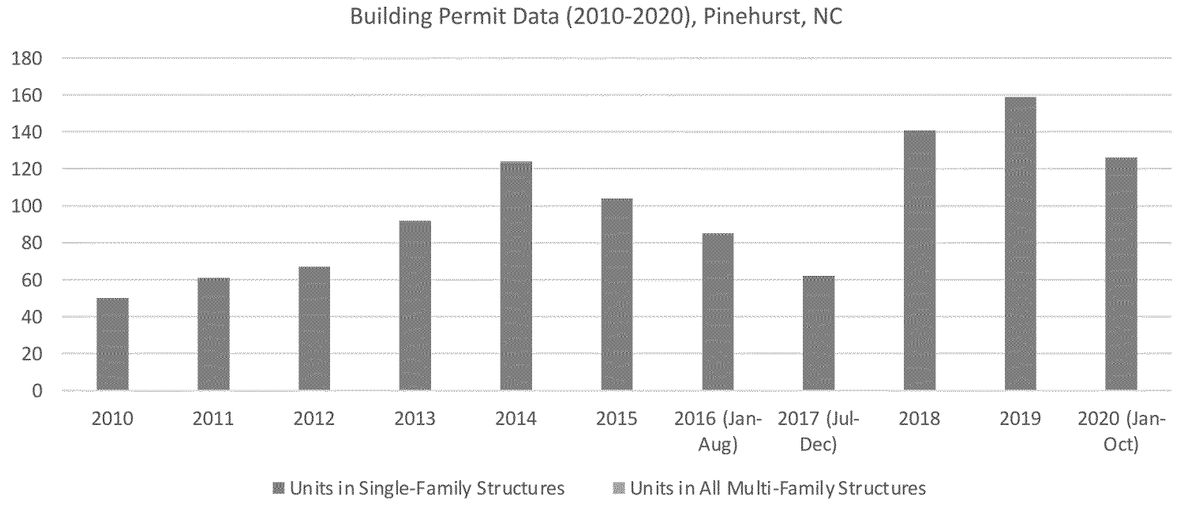


Source: Partners in Progress video

Existing Conditions

The national for-sale residential market remains strong. According to the U.S. Department of Housing and Urban Development, "National housing market indicators available as of November showed activity in housing markets improved overall. Housing market activity has rebounded as buyers take advantage of record-low mortgage rates and the economy reopened more broadly." This trend has been seen in Pinehurst as well. Sales have been strong and prices have continued to increase.

Permits in Moore County peaked in 2005 with just over 1,000 permits pulled. Permits bottomed out in 2009 at approximately 334, and never quite have reached back to the peak in 2005. In 2019, 836 permits were pulled. 2020 is on track to be another strong year with 654 permits pulled between January and September. Permits are a good indicator of new home sales in the market.

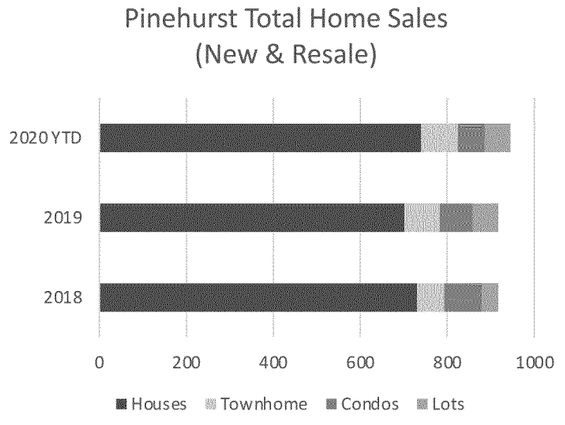


Source: Village of Pinehurst

Locally, in Pinehurst, permits are not as good an indicator of health in the residential market, as the area is much smaller and primarily built out. Permits in 2018 and 2019 were significantly higher (approximately 150 each year) than they were in previous years (83 on average between 2010 and 2015). Data is incomplete for 2016 and 2017. All of the recorded permits in the Village were for single-family units.

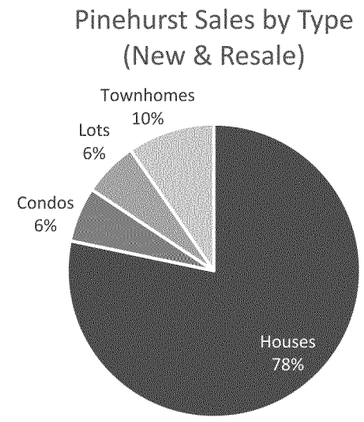
According to data available on Pinehurstrealty.com, there were approximately 2,200 total home sales in Moore County in 2019. This includes both new and resale homes. The average price was close to $300,000. Sales in 2020 are on track to be even higher than 2019, with a slightly higher price point.

Zillow data is available for Pinehurst. Data is available by "Last 12 Months", "Last 24 Months", and "Last 36 Months". Given the data was compiled in November 2020, we estimated "Last 12 Months" to be 2020, "Last 24 Months" less "Last 12 Months" to be 2019, and "Last 36 Months" less "Last 24 Months" to be 2018. The years are not exact, but a fair approximation. Based upon this data, there are approximately 900 home sales in Pinehurst annually including both new and resale. There are an additional 40-50 lots sold annually in the area.



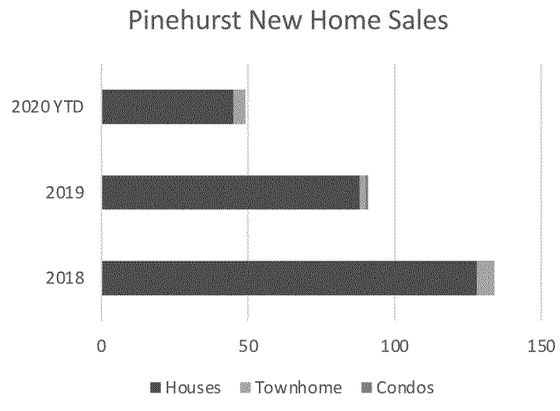
Source: Zillow.com

The large majority of sales, approximately 78%, are for single-family detached homes. Excluding lot sales, that number rises to 85% for single-family detached homes.



Source: Zillow.com

Utilizing the "year built" available in Zillow, we determined the number of homes that were new. Based upon this data, there are approximately 80-130 new homes sold per year in Pinehurst. This corresponds to the permit data available for Pinehurst. Therefore, approximately 10% to 15% of homes sold each year in Pinehurst are new. The large majority of them, approximately 90%, are for single-family detached homes.



Source: Zillow.com

Housing Data from the Census

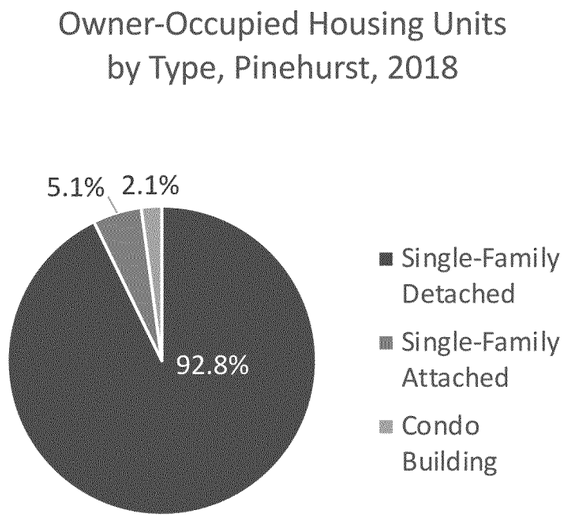
According to the Census (the American Community Survey), of the owner-occupied housing units in the Village of Pinehurst, approximately 93% of them are single-family detached. This is similar to the percentage of sales on the previous page that are single-family detached.

The majority of owner-occupied homes were built between 1980 and 2009. The highest decade of building was in the 1990s. The drop in the number of homes built has more to do with land availability and the recession than it does with underlying home demand.

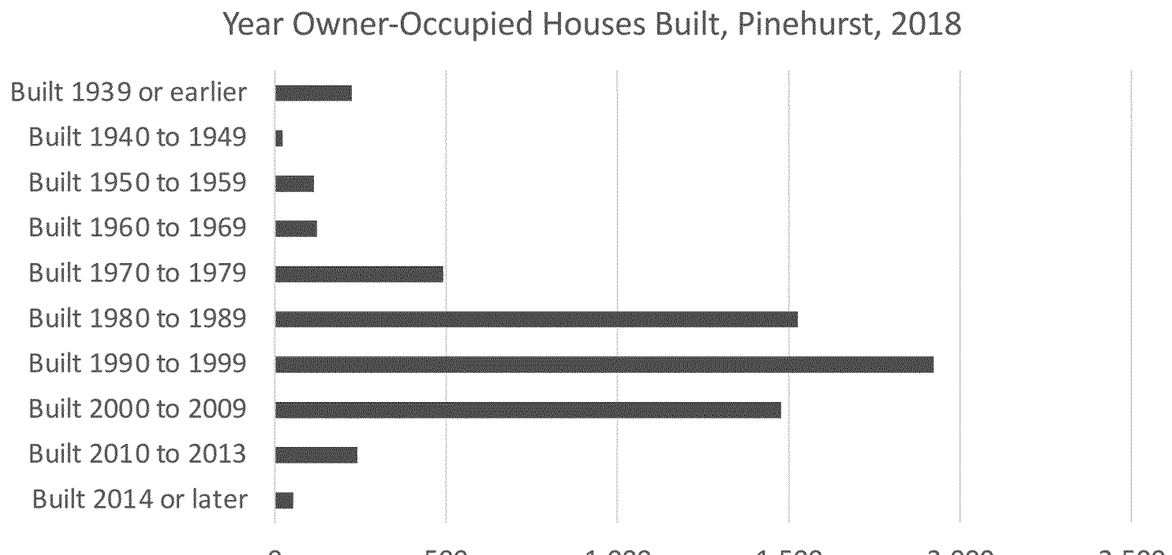
The median home value in the Village of Pinehurst is almost $300,000. The majority of homes have a value between $200,000 and $500,000. Between 2013 and 2018 the median home value increased approximately 4.5%, with the largest jump in the $300,000 to $500,000 category in 2018.

The Census reported approximately 5,712 owner-occupied housing units in Pinehurst. This increased to 6,191 in 2018. This increase of 479 homes is roughly an increase of 100 homes per year in the Village. This is very similar to the number of new homes sold each year as reported by Zillow on the previous page.

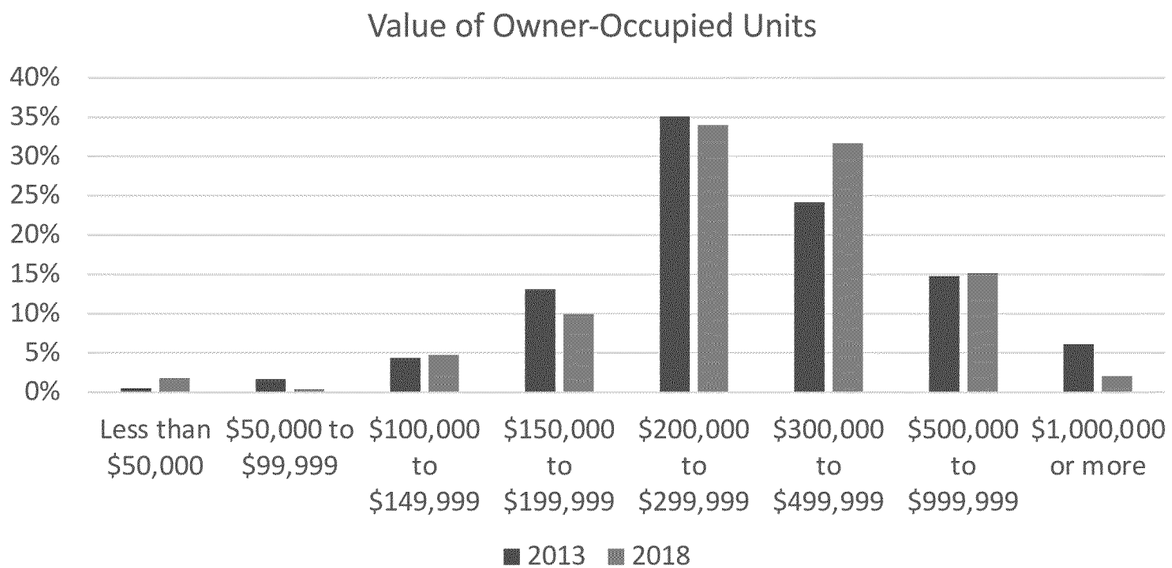
Approximately 56% of owners in the Village have a mortgage. This is down from 2013 when 65% of households reported having a mortgage.



Source: American Community Survey, 5 year estimates, 2018



Source: American Community Survey, 5 year estimates, 2018



Source: American Community Survey, 5 year estimates, 2018

Local Competitive Market

The for-sale market in Pinehurst is made up of established large-scale master-planned (MPC) golf-oriented communities (such as the Country Club of North Carolina or Pinewild Country Club). Within these large communities, there are a large number of resales as well as new home and lot sales. In addition to the typically older golf-oriented MPC and Old Town Pinehurst itself, there are smaller subdivisions in and around Pinehurst that tend to be non-amenity oriented, and feature smaller and less expensive housing.

Anecdotally, these two different types of communities attract a different buyer profile. The large MPC tend to attract older, wealthier couples and are often retirement or second homes. The smaller subdivisions attract a younger, family market, often military personnel that work in Fort Bragg.

The market is currently very tight in Pinehurst. Inventory is very low, and housing has been selling very quickly. Prices have been rising. Current buyers tend to be from outside of Pinehurst, looking to get away from the urban areas where they currently live. Feeder markets include New York, Chicago, California, Pennsylvania, Ohio, and others.

Outside of pandemic times, real estate agents report that buyers are a combination of: retirees (33%), military (33%), and others (33%). Others include people moving to be close to their kids or their parents, commuters, horse farm buyers, and land buyers.

We collected data on 18 communities in the area that offer new homes for sale. These homes are depicted on the map. Some of the communities, such as Walker Station, are all new home homes, with typically less than 100 units in the community. The other type of community is a golf-oriented MPC with a mixture of older, resale homes, lot sales, and infill new homes.

The projects are located both within and outside of the Village of Pinehurst. The market area for homes is wider than the village itself. Buyers would consider homes in the surrounding communities as well.

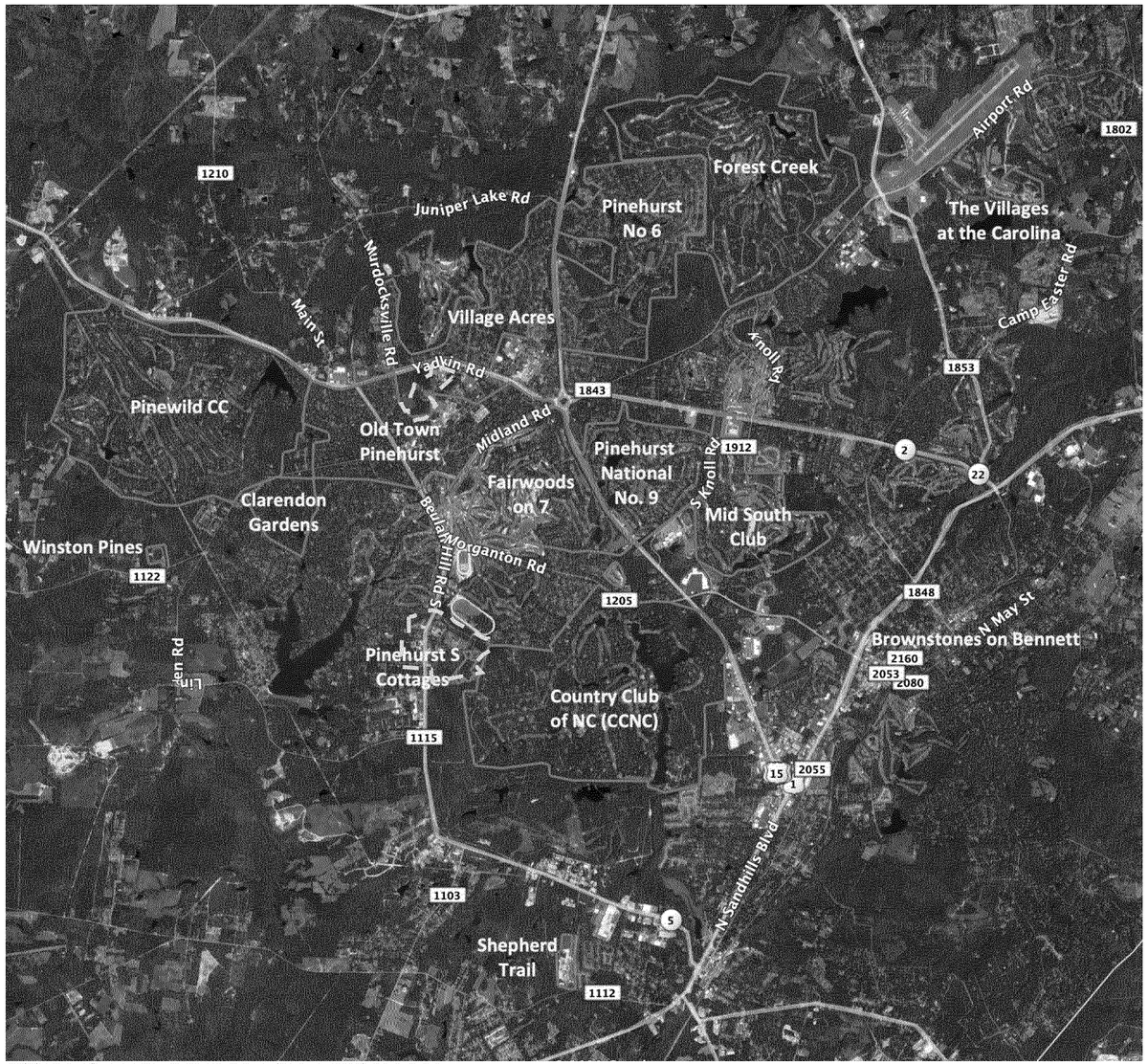
Based upon data from Zillow.com, the smaller subdivision communities tend to sell between 15-35 homes per year, with an average of around 20 new home sales per year. Almost all of the new homes sold in the area are for single-family detached homes.

These subdivision homes tend to be priced from $300,000 to $400,000, with homes between 2,000 and 3,500 square feet. The price to size charts included in the Appendix demonstrate the range of new home prices and sizes sold in each of the communities. The bottom axis shows the home sizes in square feet, and the side axis shows the home prices.

Based upon Zillow.com data, the larger golf-oriented communities can sell up to 50-75 homes per year, including both new and resale. The new home sales in these communities tend to be less than the resale home volume.

Home prices in these communities can vary widely given the age of the homes, sizes, orientation, and other factors. We examined both resale and new home prices. As shown on the price to size chart labeled, “For-Sale Homes Price to Size Chart – Large Golf-Oriented, New Homes Only” in the Appendix, there are two distinct ranges of these prices. The less expensive tend to sell new homes from $300,000 to $500,000, with homes between 1,700 and 3,500 square feet, similar to the subdivision homes. While the more expensive communities range from $500,000 to $1 million, with homes from 2,500 to 4,500 square feet on average.

More data is included in the Appendix.



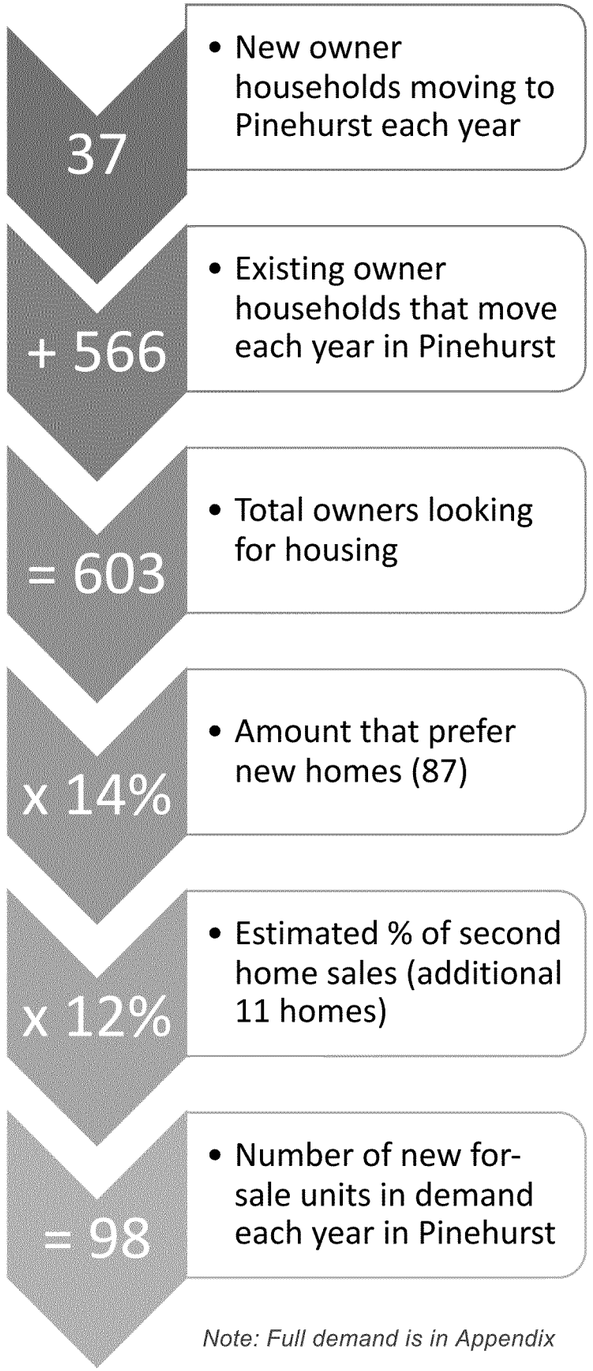
For-Sale Residential Projections

Duggal Real Estate Advisors completed a demand analysis for for-sale product within Pinehurst based upon projected household growth and existing households in turnover.

Based upon this analysis, there could be demand for an average of approximately 100 new for-sale units within the Village per year. Some years will have higher sales of new homes, and some years will have less. Having the potential for the demand does not mean the demand will or should be realized – it just indicates that based upon the demographics and preferences of households in the area, the Village could support these for-sale units if built.

The demand model utilizes the following information. The full detailed demand model is provided in the Appendix.

- Existing and new households within the Village of Pinehurst. The existing households include those that are moving each year (in turnover).
- The demand model is stratified by income to determine affordable house price. The households are further defined by being owner households.
- The number of new owner households is further refined by being likely to choose new product.



Note: Full demand is in Appendix

For-Sale Residential Market Summary

There is strong demand for for-sale residential product in the Village of Pinehurst, capturing expected household growth as well as filling the demand for primary homes, second homes, and retirement homes. Both planning areas, Village Place and Pinehurst South, are appropriate locations for for-sale residential.

Permits and sales continue to increase, suggesting a healthy market with strong demand fundamentals. Pinehurst is a popular area for housing given the historic character, architectural variety, and golf and other activities.

Home prices continue to rise in Pinehurst, but are still considered more attainable/affordable than similar housing in other parts of the country, making Pinehurst a very attractive area for retirement housing. New homes in non-golf oriented communities tend to sell for $300,000 to $500,000 on average, while new, infill housing in golf-oriented master-planned communities tend to sell for $450,000 to $750,000. There are new homes available both above and below those price ranges.

VP

Single-family homes selling in Village Place tend to be priced from $200,000 to $400,000. The two new homes that have sold in the area sold for approximately $300,000. New product within the study area could be a combination of small lot single-family detached, townhome/attached, and possibly condominium product. The price point would be above existing homes within the study area, likely within the middle band of new houses in the Pinehurst area. The pricing would depend on the location, amenities, and other development that occurs in the area.

PS

There are very few for-sale houses within the Pinehurst South study area. Just outside of the area to the west is a townhouse/attached home community built in the late 1980s that sells units for between approximately $180,000 and $230,000. For-sale homes would be marketable in the study area. There could be a combination of small lot single-family detached and townhome/villa product. The pricing would be above the existing product, and likely within the middle band of new houses in the Pinehurst area. The pricing would depend on the location, amenities, and other development that occurs in the area.

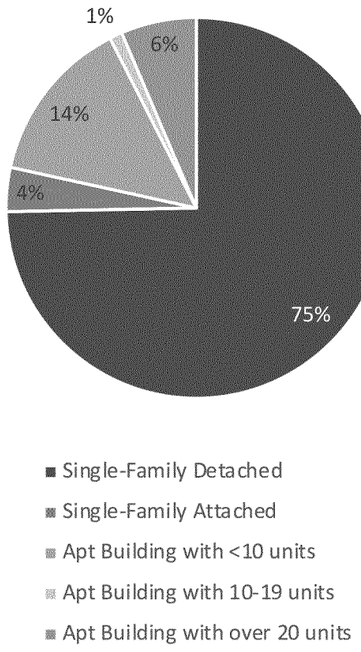
Pinehurst is projected to see strong owner household growth over the coming years; both Village Place and Pinehurst South could capture this growth and help create new, walkable, mixed-use neighborhoods.

Existing Conditions

Nationally, the apartment market has rebounded after having poorer performance directly after the shut-downs in the second quarter due to the coronavirus pandemic. This suggests that the underperformance was due to the lockdowns as opposed to changing demand conditions.

In Pinehurst, most of the renter-occupied housing is single-family detached housing, not an apartment building. The census data does not include short-term rentals under renter-occupied housing.

Pinehurst Renter-Occupied Housing Units by Type

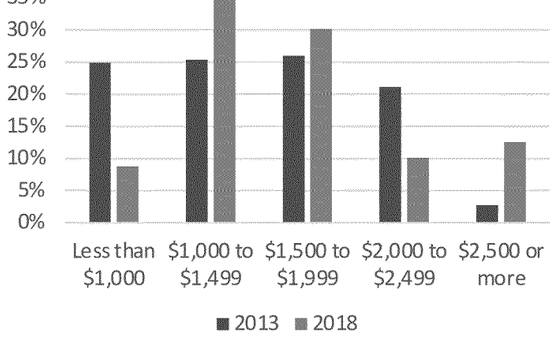


Source: ACS 5-Year Estimates (2018)

According to the American Community Survey (ACS) from the Census, the median rent in Pinehurst in 2018 was $1,547, with the majority of units renting for between $1,000 and $2,000 per month.

Rents have increased approximately 3.5% between 2013 and 2018. Approximately 170 rental units were added between 2013 and 2018, or 34 per year.

Pinehurst Occupied Apartment Units by Rent



Source: ACS 5-Year Estimates (2013 and 2018)

Local Competitive Market

We examined five existing apartment communities in the area and one planned apartment project in the area. On average, they are 97% occupied and have an average of 133 units. Renters are a mixture of transient renters (those waiting to buy or build a home), medical professionals, young professionals, military, and family.

The projects lease-up well, and have stayed well-occupied. The newest projects lease at approximately $1.20 to $1.40 per square foot ($1,100 to $1,600 per month).

Detailed information on each apartment is included in the Appendix.



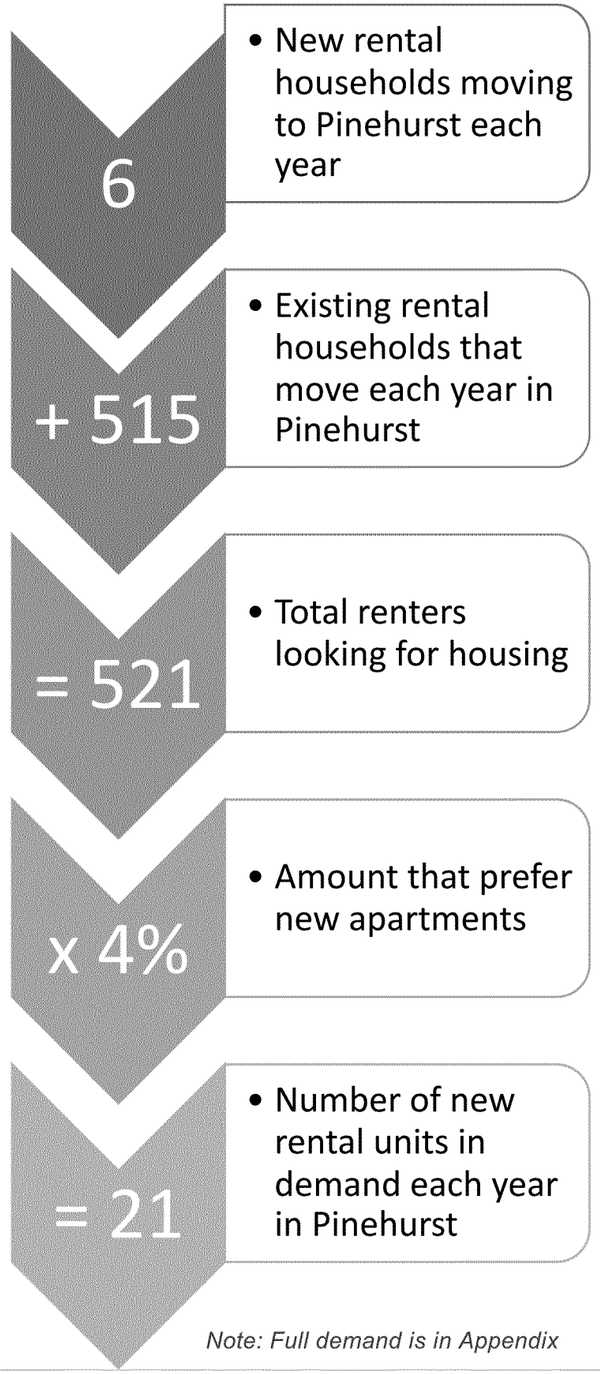
For-Rent Residential Projections

Duggal Real Estate Advisors completed a demand analysis for rental product within Pinehurst based upon projected household growth and existing households in turnover.

Based upon this analysis, there could be demand for approximately 20-25 new rental units within the Village per year on average. Some years will have no apartment construction, leading to pent up demand for future years. Having the potential for the demand does not mean the demand will or should be realized – it just indicates that based upon the demographics and preferences of households in the area, the Village could support these rental units if built.

The demand model utilizes the following information. The full detailed demand model is provided in the Appendix.

- Existing and new renter households within the Village of Pinehurst. The existing households include those that are moving each year (in turnover).
- The demand model is stratified by income to determine affordable rent. The households are further defined by being renter households.
- The number of new renter households is further refined by being likely to choose new product.
- With approximately 20 units in demand per year, the Village could support a new apartment complex, if land were available, about every three to eight years.



Note: Full demand is in Appendix

For-Rent Residential Market Summary

There is stable demand for for-rent residential product in the Village of Pinehurst, capturing expected household growth as well as filling the demand for transient renters (people waiting to move into a house, medical workers, military, etc.). Both planning areas are appropriate locations for for-rent residential.

Vacancy continues to remain low despite the addition of 180 apartment units in the region since 2020. Current vacancy is approximately 3%, indicating a strong, in-balance apartment market.

Rental rates, although not overly high compared to more suburban areas, have continued to rise in recent years. New rental product in Pinehurst is likely to rent at the higher end of the market, similar to The Greens at Arboretum. One bedrooms range from $1.43 to $1.63 per square foot ($1,000-$1,200/month), two bedrooms range from $1.18 to $1.26 per square foot ($1,200-$1,300/month), and three bedrooms range from $1.25 to $1.55 per square foot ($1,600-$2,200/month).

The Greens, a relatively new apartment complex, is located within Village Place. New for-rent residential would be marketable within the study area. It is walkable to the Village Core, is close to services and amenities, and close to open space. The rents would likely be similar to The Greens with an average rent of approximately $1,400 per month.

Pinehurst South currently has a rental townhome community, Abingdon Square Townhomes, and the Inn at Quail Haven Village, a senior continuing care retirement community (CCRC). It would be a marketable location for a rental community. It would be positioned slightly below new apartments in Village Place given it is not walkable and farther from services and amenities. The rents would likely be slightly lower than The Greens with an average rent of approximately $1,400 per month.

Pinehurst is projected to see modest rental household growth over the coming years; both Village Place and Pinehurst South could capture this growth and help create new, walkable, mixed-use neighborhoods.

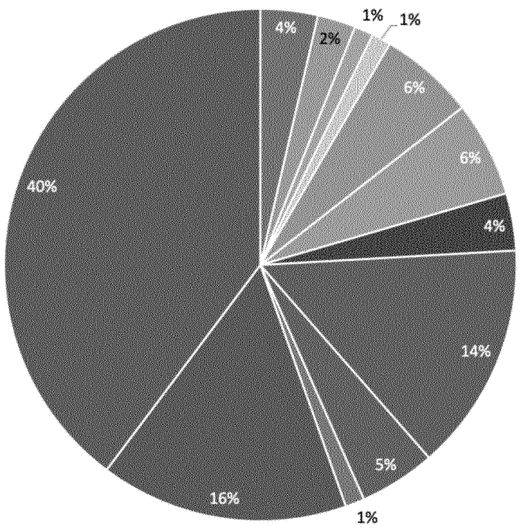
MARKET STUDY

RETAIL ANALYSIS

Existing Conditions

The national retail market has been impacted by Covid-19. Shutdowns throughout the country in retail and restaurants have hurt tenants and landlords. Stores that provide essentials (such as grocery stores or drugstores) have done better during the pandemic. Nationally there has been negative absorption of retail space (meaning more space was vacated than tenanted), and some tenants struggle to pay their rents. There has also been a wave of closures and bankruptcies. Nationally, the net absorption of new retail space is projected to take as long as mid-year 2022.

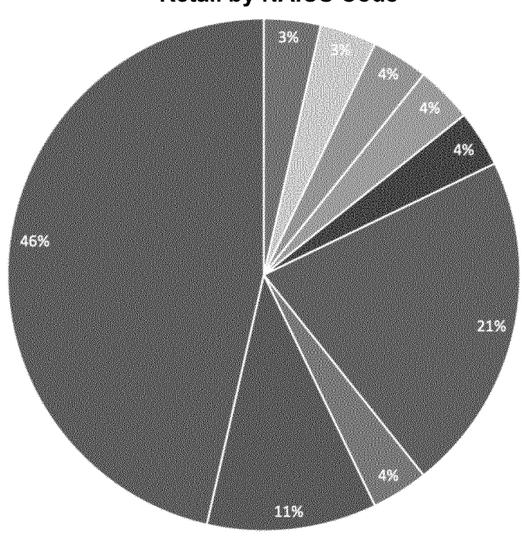
Pinehurst Village, Breakdown of Retail by NAICS Code



Locally, brokers have indicated that the overall the market is still doing well, with an estimated 5% vacancy rate. Centers with strong grocery anchors are performing better than average.

Pinehurst Village has approximately 85 retail businesses. Of these, approximately 30 (or 35%) are located within the Village Core. The largest percentage of retail businesses (40% in Village and 46% in Village Core) are Food Services and Drinking Places. Based upon Moore County Assessor data, there are approximately 165,000 square feet of retail in the Village. Most of the shopping of Village residents is done outside of the Village limits.

Pinehurst Village Center, Breakdown of Retail by NAICS Code



Source: Esri

Local Competitive Market

Retail in the Pinehurst area is made up of downtown retail, shopping/strip centers, and stand-alone corridor-oriented retail.

We collected data on eight different shopping centers in the area to understand the retail market in the area.

The shopping centers vary in size from 50,000 square feet at Pinehurst Plaza near Pinehurst South to almost 280,000 square feet at Pinecrest Plaza along US 15-501. The centers are approximately 94% occupied. Most of the shopping centers are located along US 15-501 and US 1. There are also shopping centers along NC 211.



Local Competitive Market Cont.

Lease rates in the area for well-placed retail tends to be in the mid $20s per square foot triplet net (NNN – meaning, the tenant is responsible for paying the taxes, insurance, and common area maintenance fees). The area has been slowly shifting from gross rents (where the landlord pays the taxes, insurance, and common area maintenance) to NNN rents. Triple net rents are more typical for retail across the country, while gross rents are more typical for office spaces.

Some new retail in the best locations has been reaching as high as the mid $30s/SF NNN. The best retail in the US 15-501 area is in the high $20s/SF NNN. Older retail in the area is typically in the low to mid teens ($13/SF NNN).

Interviews suggested that new retail would need to achieve around $24-$30/SF NNN in order to be viable.

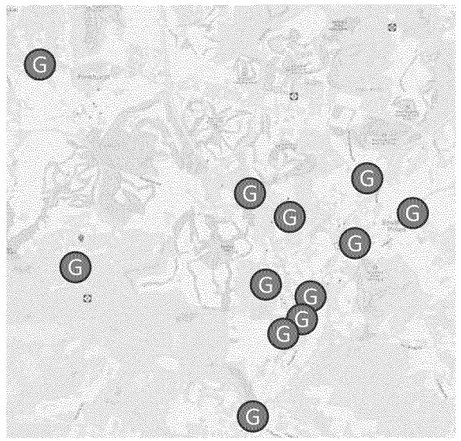
Pinehurst, Southern Pines & Aberdeen Area Estimated Retail Lease Rates

Location	Estimated Average Lease Rates
Downtown Southern Pines	$30/SF NNN
Downtown Pinehurst	$20-$24/SF NNN
Aberdeen	$12-$15/SF NNN
Newest retail in best locations	$30-$34/SF NNN
US 15-501 area strong retail	$27-$30/SF NNN
NC 5 near Pinehurst South	$12-$15/SF NNN
Older, outdated retail	$8-$12/SF NNN
General lease rate for reasonable retail	$20-$22/SF NNN

Source: Internet searches, broker conversations

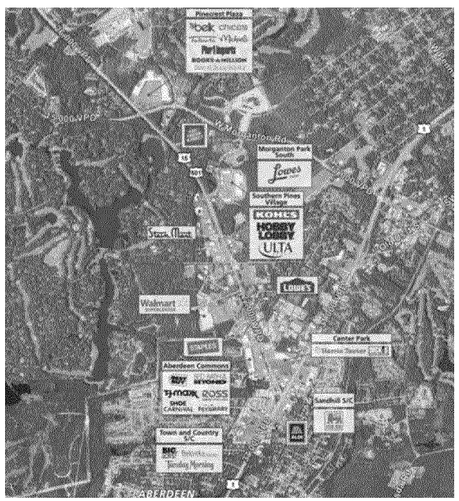
The Pinehurst area has a mixture of locally-serving (such as grocery stores, drugstores, restaurants) and regionally serving (such as department stores, big boxes, discount stores) retail. The locally serving is spread out somewhat throughout the area, while the regionally serving is concentrated in the US 15-501 area.

Grocery Store Locations



Source: Apple Maps

National Chain Store Locations



Source: Loopnet

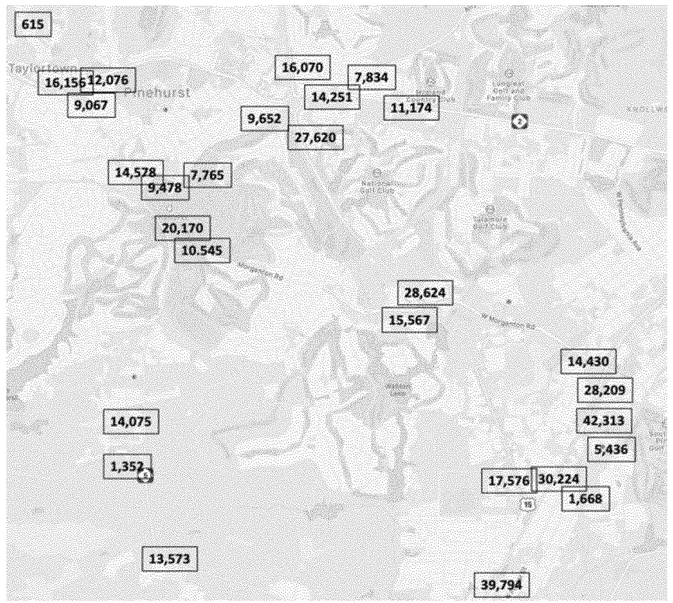
Site Selection

An important site decision criteria for retailers is traffic counts. Most retail tenants prefer to be located in an area with high traffic counts.

The traffic counts in the area are highest along US 15-501 with up to 30,000 or 40,000 cars per day. Near Pinehurst South along NC 5 there are approximately 15,000 cars per day, and along NC 211 near Village Place there are approximately 12,000 to 16,000 cars per day. There are less cars within the boundaries of each of the planning areas.

The amount of traffic required varies based upon location (urban, suburban, and rural, for example) and type of retail. A typical rule of thumb would be 20,000 cars per day. However, in a location like Pinehurst, 15,000 cars per day would likely meet the requirement. This is positive for retail near the planning areas.

Traffic Counts



Source: Loopnet

Other important criteria for retailers include the number of people that live within their trade area, the average household income, and sometimes education levels.

A national grocery store, for example, requires 40,000 people within three miles with median household incomes of $50,000 (source: ICSC).

The planning areas meet the requirements for many of the retailers. The population of Village of Pinehurst, Southern Pines, and Aberdeen combined is approximately 40,000. Pinehurst is is highly educated, and the median income is approximately $80,000.

The below tables are not absolutes, and are national averages. Likely in Pinehurst, retailers would be satisfied with lower requirements, but it provides an idea of what types of locations would be viable for different retail types.

Retail Tenants Site Selection Criteria

	Type	Mile Range	Min. Pop.	Avg. HH Income	Traffic Count
Locally Serving	Drug Store	1	10K	$20K	15K
	Grocery	3	40K	$50K	20K
	Salon	3	36K	$45K	5K
Regionally Serving	Clothing	5	100K	$60K	n/a
	Furniture	5	100K	$55K	25K
Food & Beverage	Sit-Down Rest.	3	56K	$50K	23K
	Fast Casual	1	10K	$50K	10K
	Coffee Shop	1	10K	$60K	25K

Source: Internet searches

Retail Projections

Duggal Real Estate Advisors completed a demand analysis for retail within Pinehurst based upon household retail expenditures and retail sales.

Based upon this analysis, there is a significant amount of retail leakage in Pinehurst – meaning that people in Pinehurst spend their retail dollars outside of the Village limits. This is not surprising given the location of the retail in the area and the size of the community; the retail in the Village functions as part of a larger market area.

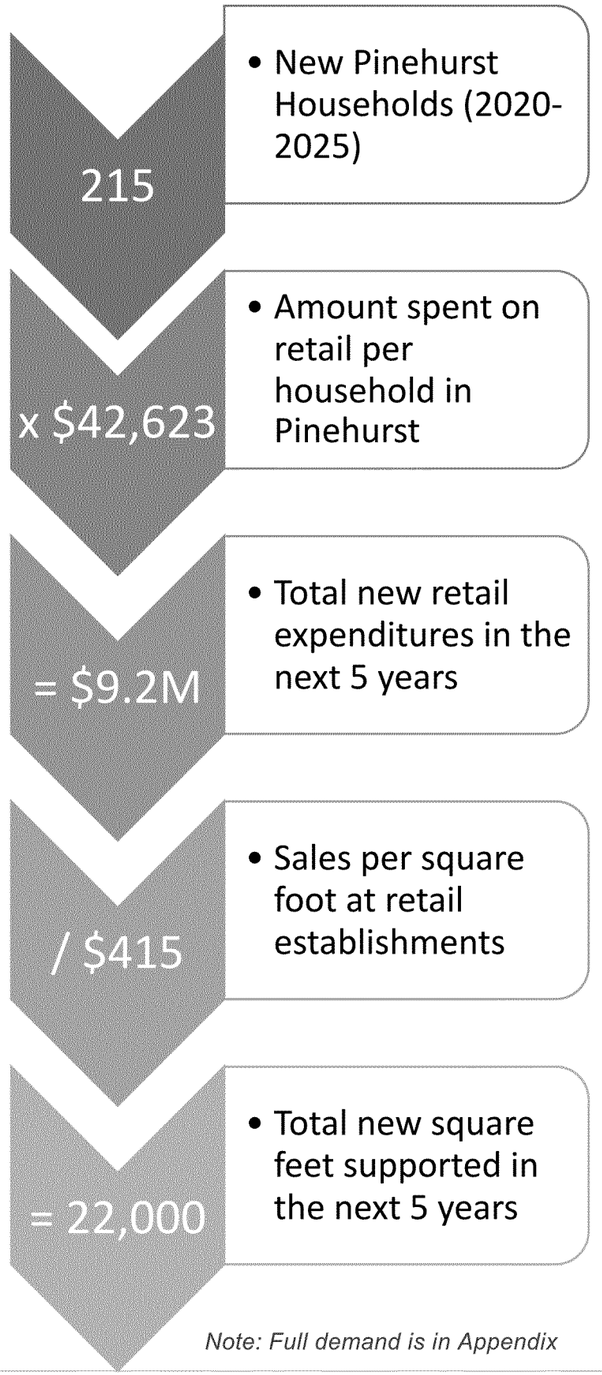
We also completed a demand model for Moore County overall. This also suggests leakage in many retail categories such as Motor Vehicle Dealers, Furniture Stores, Building Supply Stores, Gas Stations, Clothing Stores, and others.

In order to keep the demand for retail conservative, we focused demand potential based upon future household growth, as opposed to capturing retail demand that is being met in other areas or potentially on-line.

Based upon these demand models (provided in detail in the Appendix), the households in the Village can support an additional 20,000 to 25,000 square feet of retail by 2025, and every five years after that if household growth continues as projected. Based upon where retail is located in the area, not all of this demand would likely be located within the Village limits.

Moore County, excluding Pinehurst, can support an approximate additional 90,000 to 100,000 square feet of new retail every five years.

The demand models provide square feet by retail type. We note that this demand is for an average five year period, and that the next year or two could be overly challenging for retail given the recovery needed post Covid-19.



Note: Full demand is in Appendix

Retail Market Summary

There is stable demand for new retail within the Village of Pinehurst. Demand for new retail is primarily driven by households in the area, as well as tourists. Both planning areas could be appropriate locations for locally-serving retail. Neither would be an ideal location for regional retail.

Retail occupancy is currently down due to Covid-19, but still performing relatively well compared to other similar parts of the state that are reported to be experiencing higher vacancy. Occupancy should increase after the pandemic is over.

The average rental rate has been relatively stable, and in many places the rental rates are approaching the amount needed for new construction (roughly $24 to $30/SF).

VP

Village Place is adjacent to the Village Center. There is also a collection of small retail along Rattlesnake Trail. This area could be built upon. Village Place would be an appropriate location for retail including restaurants, entertainment, tourist-oriented, and locally serving retail. Larger format retail might prefer to be along NC 211, while smaller retail could be an extension of the Village Core, brewery, and retail along Rattlesnake Trail.

PS

Pinehurst South is adjacent to some underperforming, older retail. Within Pinehurst South there are some retail businesses including the new ABC store, bank, and framing shop. Pinehurst South would be a reasonable location for retail. The main challenge on the eastern side of NC 5 is access – retail needs good access, and the rail road crossings make that difficult. There could be some smaller retail that supports the existing businesses. The western side of NC 5 would be a good location for locally-serving retail.

Pinehurst is projected to see modest retail growth over the coming years; both Village Place and Pinehurst South could capture this growth and help create new, walkable, mixed-use neighborhoods.

Existing Conditions

The national office market has been negatively impacted by Covid-19. Office-using employment is down significantly and many companies are looking to re-negotiate leases, sublet some of their space, or consolidate into smaller spaces. It is not clear what the long-term impact of Covid-19 will be on people working from home. It is likely that more people will work from home at least part time after the pandemic, impacting the overall demand for office space. National office vacancy rates which were under 10% in early 2020, are expected to jump to 12% or higher and stay that way for a while. The Class A market has been hit worse than the Class B and C markets, likely due to lease rates and job type (essential versus non-essential).

It is harder to gauge the complete impact of Covid-19 on the local office market. Knowledgeable professionals have indicated that the market is well-occupied, and some areas have experienced a good amount of turnover.

In the Pinehurst area, many office service uses (such as accountant, real estate agent, etc.) occupy retail space. Based upon conversations with brokers as well as internet searches, we have put together the following table with average office lease rates.

Lease rates in the area for office tends to be in the $12-$18 per square foot triplet net (NNN – meaning, the tenant is responsible for paying the taxes, insurance, and common area maintenance fees). The area is a mixture of net rents and gross rents (where the landlord pays the taxes, insurance, and common area maintenance). Triple net rents are more typical for retail across the country, while gross rents are more typical for office spaces.

Pinehurst, Southern Pines & Aberdeen Area Estimated Retail Lease & Sales Rates

Location	Est. Avg. Lease Rates
Pinehurst Downtown	$12-$15/SF NNN
Southern Pines New Space	$18-$22/SF Gross
Older Office	$10-$15/SF Mixture of Gross & NNN
Turnberry Office Park	$12-$18/SF NNN, up to $22/SF
Medical Office	$12-$25/SF NNN, $300K for a lot
Trotter Hill	$100-$150K for a lot

Source: Internet searches, broker conversations

Pinehurst Village has approximately 188 businesses that could occupy office space. The largest number of businesses are in the “Other Services” category, followed by Real Estate, Rental & Leasing Offices, and Professional, Scientific and Technical Services. Based upon Moore County Tax Assessor data, there are approximately 230,000 square feet of office in the Village. In addition to these business types, there are 73 businesses in Pinehurst related to health care and social assistance, leading to the demand for medical office space. There are approximately 500,000 square feet of this type of space. This square footage likely includes the hospital.

Businesses and Employees in Pinehurst by NAICS	No. of Businesses	No. of Employees
Information	10	56
Securities, Commodity Contracts & Other Financial	16	39
Insurance Carriers & Related Activities; Funds, Trusts	7	22
Real Estate, Rental & Leasing	37	221
Professional, Scientific & Tech Services	31	315
Legal Services	6	46
Management of Companies & Enterprises	2	6
Administrative & Support & Waste Management & Remediatio	12	60
Other Services (except Public Administration)	55	314
Public Administration/Government	12	192
Total	188	1271
Health Care & Social Assistance	73	4720

Source: Esri

Local Competitive Market

Office in the Pinehurst area is located in many of the same areas as retail, but there are concentrations near the hospital, the downtowns, near US 15-501/US 1 and in business parks such as Turnberry Wood and Trotters Hill Circle. There is also some office space on NC 5 closer to US 15-501 that is more flex-space in nature.

Flex space would typically accommodate both warehouse and office space, and be a real estate product in-between industrial and office space.

Since many offices are owner-occupied (possibly as much as 60% of the market), the overall vacancy of office space is hard to determine. New space tends to take some time to lease-up, but there is not a lot of vacant space in the market.

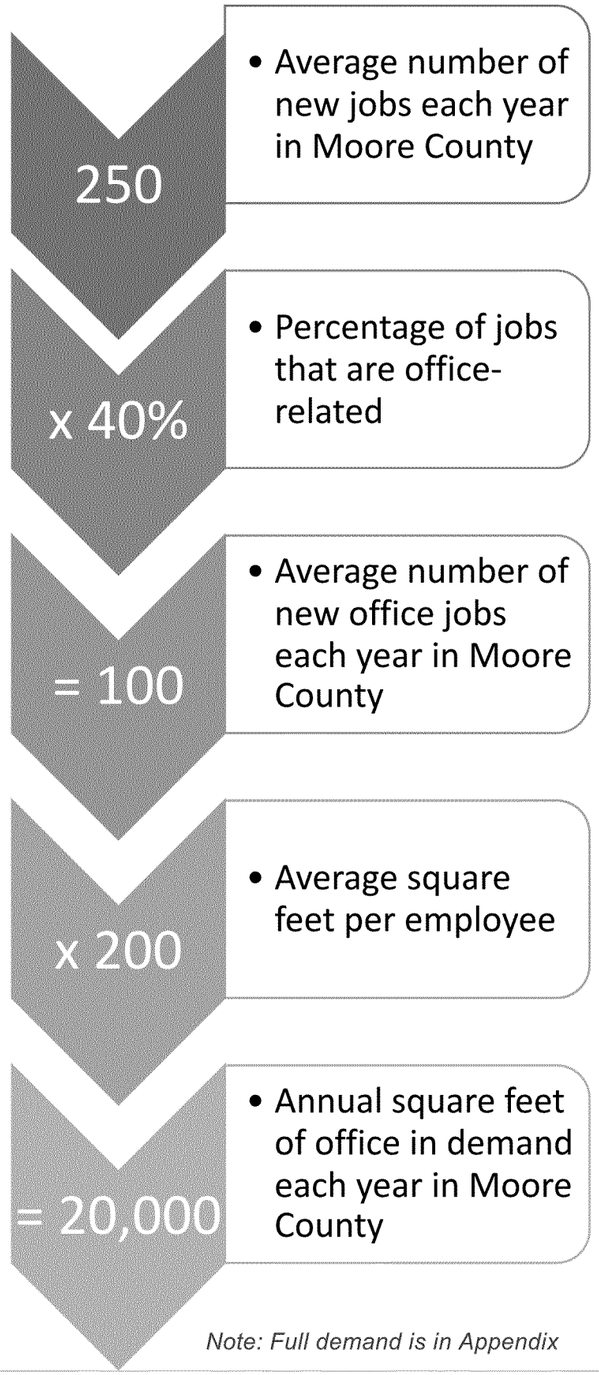


Office Projections

Duggal Real Estate Advisors completed a demand analysis for office product within the Pinehurst area based upon projected employment growth. Based upon this analysis, there could be demand for approximately 20,000 square feet of new office within Moore County per year. Pinehurst has approximately 25-30% of the employment of Moore County, and if it received the "fair share" of office square feet, there could be demand for 5,000 to 6,000 square feet of new office per year. This is likely high given the amount of space that has chosen other locations. Some of this would likely locate in retail-like space. Having the potential for the demand does not mean the demand will or should be realized – it just indicates that based upon the economics and preferences of office tenants in the area, the Village could support this office if built.

The demand model utilizes the following information. The full detailed demand model is provided in the Appendix.

- Anticipated employment growth within Moore County.
- Amount of employment growth that is likely to produce the demand for office space. For example, a new landscaping job or retail job would not increase the demand for office, but a new insurance job or dentist job would increase the demand for office.
- Square feet of office space typically occupied per office user. Before Covid-19, this number had been trending downwards based upon shared working space and open concept floor plans. At this point it is not clear how the future of office space will evolve based upon the coronavirus and people's desire and need to have more space. Given that a certain amount of workers are likely to stay home, that could counteract the need for more space per employee. Based upon this, we have used 200 square feet per employee.



Note: Full demand is in Appendix

Office Market Summary

There is limited demand for office product in the Village of Pinehurst based upon projected office-related employment growth. Both areas would be reasonable locations for office. Village Place would likely be smaller, service-oriented firms, while Pinehurst South could capture larger offices, including medical and potentially any spill-over effects from the USGA.

✓ Occupancy continues to remain high and there has been turnover within buildings. New space has been constructed and slowly leased within the area.

$ Rental rates for most tenants remains below the threshold to build new product. New office product can be built when leases reach $18-$22/SF. This is starting to happen through the Pinehurst area, so new office construction would be feasible.

V P There is very little office currently located within Village Place. The location would be appropriate for small-scale office that is locally-serving and generated such as accountants and real estate professionals. It would likely be a mix of building types up to three stories.

P S Pinehurst South has a fair amount of office. Some of it is medical office, such as dentists, and some is locally-serving such as financial planners. The location would be appropriate for both office mixed in with other uses as well as more stand-alone, larger office given land availability. It would likely be a mix of building types up to three stories.

Pinehurst is projected to see limited office growth over the coming years; both Village Place (VP) and Pinehurst South (PS) could capture this growth. In VP it would be part of a walkable, mixed-use neighborhoods. In PS it could also be more office-park like space.

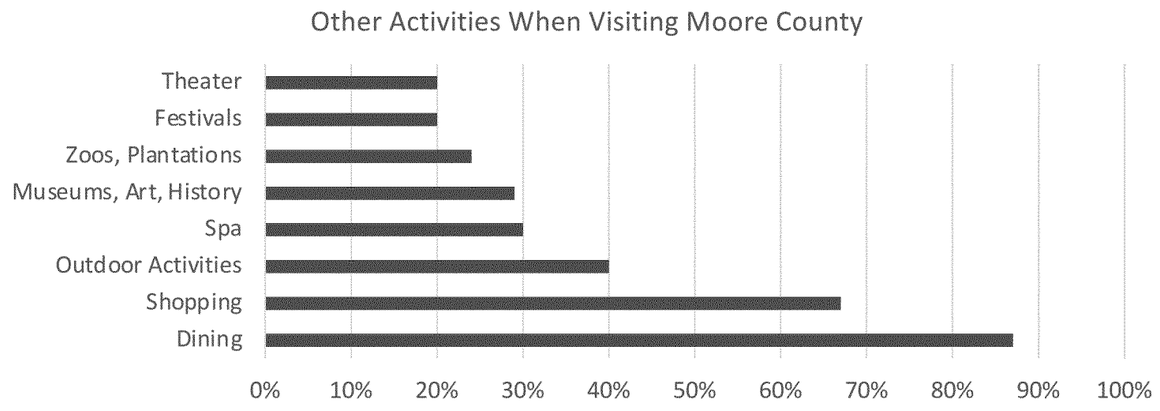
Existing Conditions

Pinehurst receives approximately 1.14 million total visitors each year. The impact of tourism on the area is strong – it provides a significant amount of jobs in the area as well as an influx of dollars. Moore County has the 11th highest tourism revenues of all the counties in North Carolina. Information about these visitors is provided in the following graphs and charts.

Moore County Visitors	
College Graduates	71%
Professional / Executive / Managerial	69%
Household Income Over $60,000	71%
Men	72%
Women	28%
Retired	16%
Median Age	43
Avg. Size of Travel Party	3.2 People
Avg. Length of Stay	4.5 Nights
Avg. Expenditure Per Person Per Visit	$385

Moore County Top 15 US Markets	
1. New York, NY	9. Atlanta, GA
2. Philadelphia, PA	10. Pittsburgh, PA
3. Washington, DC	11. Cleveland, OH
4. Charlotte, NC	12. Tampa, FL
5. Baltimore, MD	13. Hartford & New Haven, CT
6. Raleigh-Durham, NC	14. Orlando, FL
7. Chicago, IL	15. Richmond, VA
8. Boston, MA	

Moore County Visitor Golf Profile	
Play Golf 10+ Years	84%
Play Golf 3 or More Times/Month	91%
Play 24 Rounds When Traveling	92%
Married	61%
Men	83%
Women	17%



Source: Convention & Visitors Bureau, Pinehurst, Southern Pines, Aberdeen Area

Local Competitive Market

The Convention & Visitors Bureau, Pinehurst, Southern Pines, Aberdeen Area (CVB) tracks 40 existing and one under construction property in Moore County. There are approximately 3,000 hotel rooms in the entire county. We focused on the properties that are closer to Pinehurst in the Pinehurst, Southern Pines, and Aberdeen areas. These areas have approximately 1,800 hotel rooms, and of these approximately 604 are in Pinehurst.

A large number of the hotel rooms in Pinehurst are located within the Pinehurst Resort with The Carolina Hotel & Villas (334 rooms), Holly Inn (82 rooms), and the recently renovated Manor Inn (42 rooms).

In addition to formal hotel rooms, there are also a collection of Air B&B and VRBO rooms in the area. According to the CVB, there has been a large growth in these, and there are approximately 150-200 in Pinehurst.



Local Competitive Market Cont.

According to data from Smith Travel Research (STR), a national hotel data provider, occupancy is down in the area as of year-to-date November 2020 compared to 2019. In 2019, the overall occupancy for the year through November was 65% in Moore County compared to 47% in 2020. This is not surprising given the situation with the coronavirus. At the same time, the Average Daily Rate (ADR, a measure of revenue per occupied room) is down only slightly from $137 in 2019 to $130 in 2020. RevPAR (revenue per available room, a measure of occupancy and ADR) is also down from $89 in 2019 to $61 in 2020.

Given how well the area was doing pre-pandemic, and how relatively well the area has done during the pandemic, there is every reason to suspect that the hospitality market will rebound to where it was before the pandemic. In fact, due to the resurgence of golf and increased leisure business, once the group business returns, the Pinehurst area is well-positioned to continue to perform strongly in hospitality.

As shown below, 2019 was a very good year for the area in terms of hospitality, and all of the metrics had been trending up before Covid-19.

Pinehurst, Southern Pines & Aberdeen Area	2017 (Ja-No)	2018 (Ja-No)	2019 (Ja-No)	2020 (Ja-No)
Occupancy	58.7%	62.5%	65.1%	46.7%
ADR	$127	$129	$139	$131
RevPAR	$74	$81	$90	$61

Source: STR

Guests in Pinehurst before the pandemic were a mixture of golf leisure outings (accounting for roughly half of the guests) and groups. During the pandemic, the leisure business has increased while the group business has died off. Since most of the hotel stock in Pinehurst is resort and/or golf-related, it likely has a higher percentage of both of these groups than hotels along US 15-501 which also report getting business travel (such as Duke Energy, military, and rail road business).

Hospitality Projections

Duggal Real Estate Advisors completed a demand analysis for hotel rooms within Pinehurst based upon past hotel room growth and growth in tourism expenditures.

Based upon this analysis, there could be demand for approximately 25 new hotel rooms within the Pinehurst, Aberdeen, and Southern Pines area per year. Having the potential for the demand does not mean the demand will or should be realized – it just indicates that based upon the likely increase in travelers, the area could support more hotel rooms in the future. Pinehurst would be a good location for new hotel rooms.

The demand utilizes the following information. Additional information for the demand is provided in the Appendix.

- Supply of hotel rooms has grown by approximately 1.4% every year, although a new hotel is not built every year. The demand grows until a new hotel is built.
- The economic impact of domestic travel in Moore County continues to grow. The employment changed 2.4% between 2017 and 2018.
- Moore County CVB projects all visitors (overnight, daytrips, and those visiting friends) to increase by 2% to 4% per year.

Hospitality Market Summary

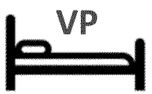
There is stable demand for hospitality product in the Village of Pinehurst, capturing leisure, group, medical, and to a lesser degree, business travelers. Both planning areas could be appropriate locations for a hotel, but Village Place is likely more desirable given its walkability to the Village Center.



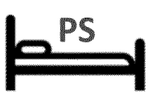
Occupancy is currently down due to Covid-19. After the pandemic, the market is likely to fully rebound to previous occupancy levels (65%).



The Average Daily Rate has remained strong despite Covid-19 at $131 for 2020. The RevPAR, which also takes into account occupancy, is down to $61 for 2020, but should return to pre-covid levels ($90 in 2019).



The Manor is located within Village Place. It has 42 rooms, and was recently renovated. It is a higher-end hotel in the area. Village Place would be a good location for additional hotel rooms. It is close to downtown, NC 211, and could appeal to golf, medical, and business travelers. The type could be bed and breakfast, boutique, or limited service hotel.



There are no hotels currently in or near Pinehurst South. The majority of hotels in the area are concentrated either close to Pinehurst Center or along the major highways including US 15-501 and US 1. Currently, Village Place would be a more attractive location for a hotel than Pinehurst South given its location close to the Village Center. This hotel type would depend upon place creation. As is, it would most likely be a limited service hotel.

Pinehurst is projected to see modest hospitality growth over the coming years; both Village Place and Pinehurst South could capture this growth and help create new, walkable, mixed-use neighborhoods.

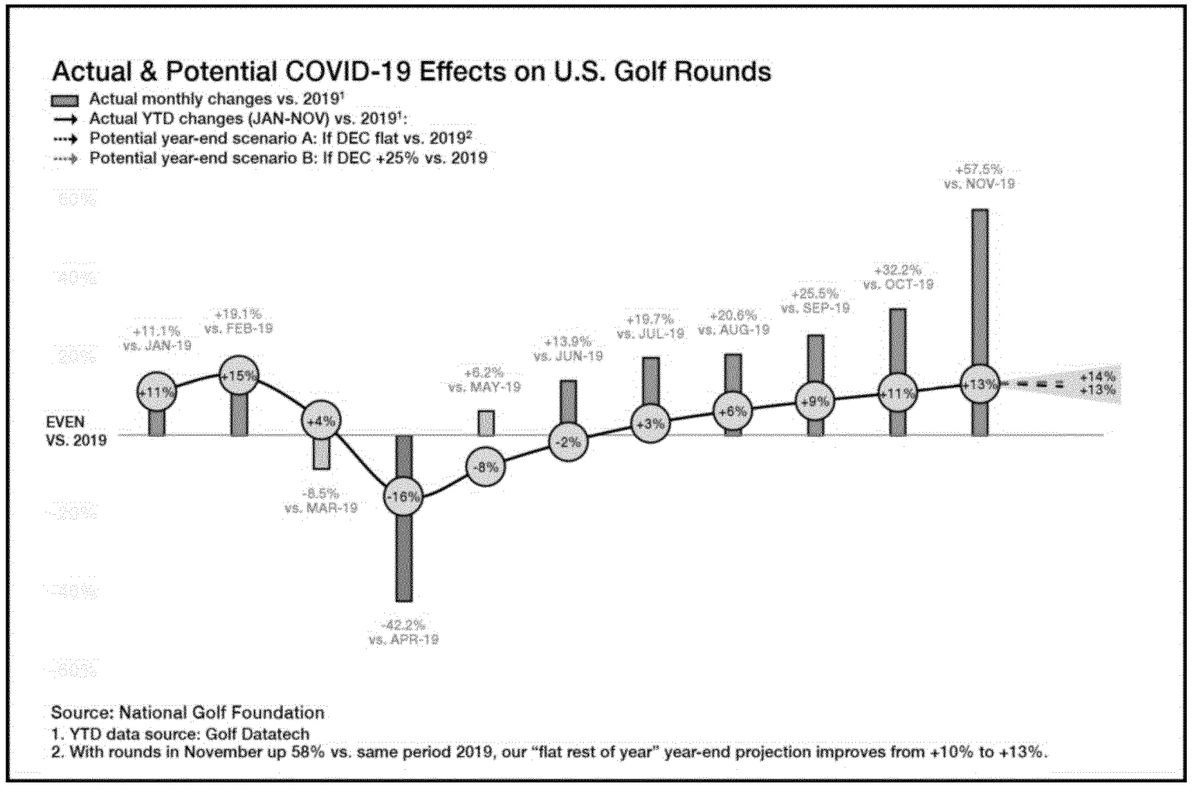
Existing Conditions

Golf has been holding steady in terms of participation over the last few years, and is anticipated to have a positive impact from Covid-19. After a drop in rounds in March and April of 2020, golf has seen an increase in the number of rounds played compared to last year. More people have been golfing due to Covid-19 restrictions in other areas of life and changes in work habits. The National Golf Foundation reported that golf rounds were up 57% in November 2020 compared to November 2019.

Another large trend is the "off-course" participation in TopGolf, Drive Shack, indoor simulators, and similar.



Source: National Golf Foundation



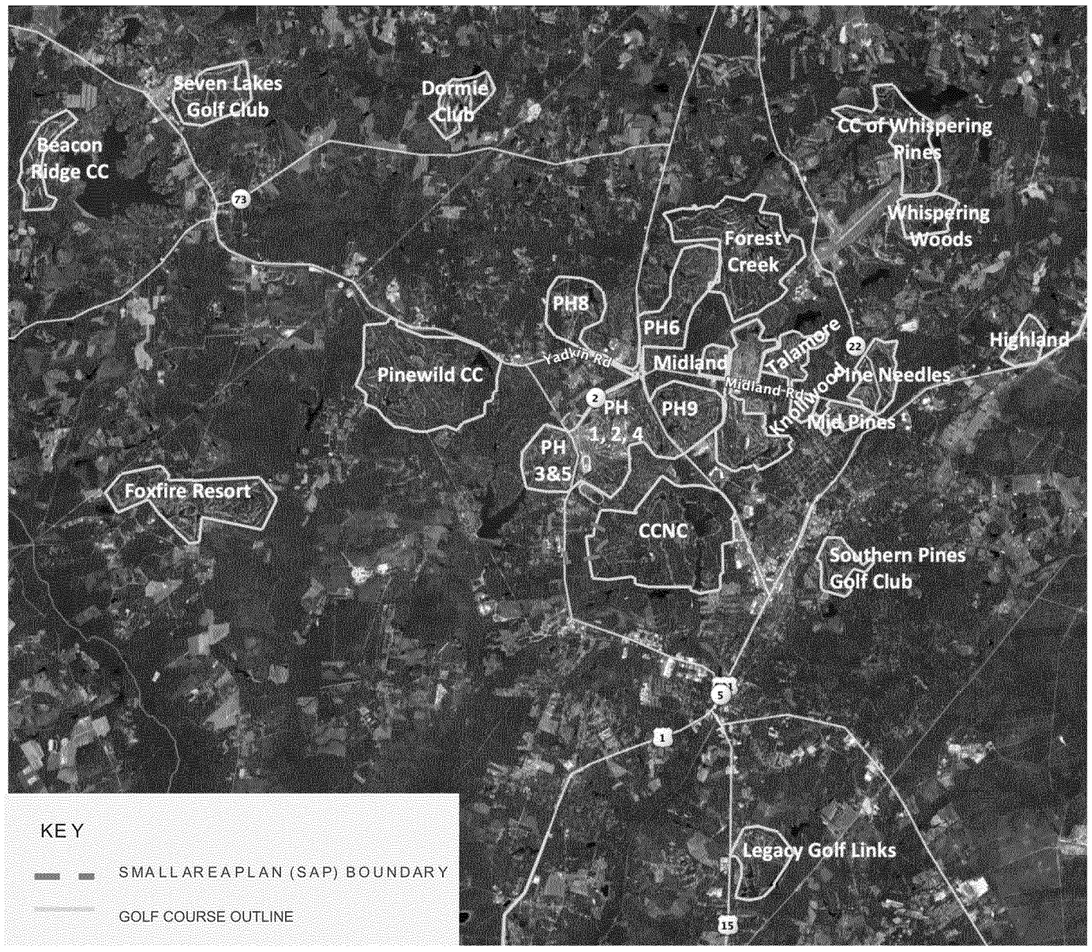
Source: National Golf Foundation

Local Competitive Market

The Convention & Visitors Bureau, Pinehurst, Southern Pines, Aberdeen Area (CVB) tracks golf courses in the area. There are 43 golf courses with a total of 769 holes in Moore County, and 243 (32%) are located within the Village of Pinehurst. The next largest number of holes are located in Southern Pines (108) followed by Midland/Morgantown Roads (94).

Golf courses in the area are reported to be doing very well. As nationally, the number of rounds played is up as well as the number of members.

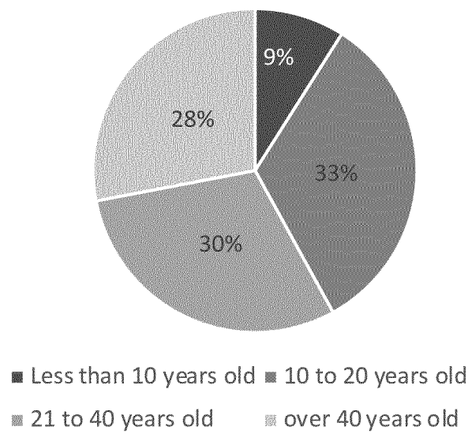
For courses that offer a membership, they range from approximately $20,000 to $50,000 initiation fee and annual dues range from $5,000 to $10,000 per year. There are a wide variety of courses, and therefore membership levels available in the area. Additional information on courses in included in the Appendix.



Local Competitive Market Cont.

Four courses have been built in the last 10 years within Moore County. Most of the courses are significantly older.

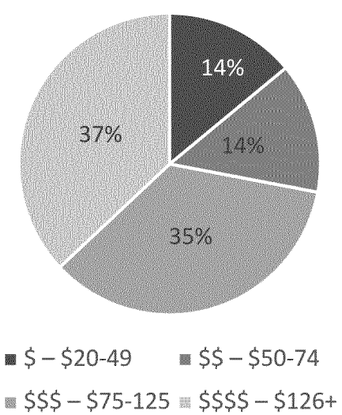
Age of Golf Courses



Of the 769 holes, most are semi-private (62%), followed by public (18%), private (14%), and resort (6%).

Most of the courses are priced over $126 per round.

Price of Golf Round



Source: Convention & Visitors Bureau, Pinehurst, Southern Pines, Aberdeen Area

Golf Projections

Duggal Real Estate Advisors completed a basic demand analysis for golf within Moore County based upon golf participation, rounds of golf per golfer, population growth, and growth in tourism.

Unlike most of the land uses, demand for golf has been limited in the last 10-15 years as golf participation in the US had been decreasing or remaining steady. 2019 was the first year in 14 years that there had been an increase in the number of golfers in the US. Golf participation dropped from 29.8 million in 2006 to 24.3 million in 2019. As discussed previously, the trend appears to be heading up again, in part due to Covid-19.

To keep the demand relatively conservative, current participation rates and rounds of golf per were used in the demand. We also assumed that the golf market was currently more or less at equilibrium to determine the number of rounds of golf per course. We further assumed that the number of tourists would increase. Based upon this demand and the assumptions included, Moore County could support two to three new golf courses in the next 10 years. Pinehurst would be an appropriate location for new courses if land were available.

The demand model is included in the Appendix.

Golf Market Summary

There is stable demand for golf in and around Pinehurst, capturing tourist and member rounds. Neither planning area would be appropriate for a new golf course given the amount of acreage needed. Pinehurst South could be a location for golf-support activities.

Participation is currently up in the US for the first time in many years. Pinehurst has also seen an increase in the amount of golfers and rounds played this year.

According to the National Golf Foundation, the average round in the US costs $61 in 2020. Pinehurst has rates far above the national average for golf.

Village Place cannot accommodate a new golf course. Given the nature of the other land uses, this is not as good of a location for other golf uses that might be appropriate in Pinehurst South.

Pinehurst South cannot accommodate a new golf course. It could be an appropriate location for golf operations facilities.

Pinehurst and the surrounding area are projected to see modest golf growth in the coming years; neither Village Place nor Pinehurst South could support a golf course. Pinehurst South could be a viable location of golf-support activities (maintenance, back of house, etc.).

APPENDIX

MARKET ANALYSIS

APPENDIX

Additional Economic Data

Employment Projections by Industry

Area Name	Industry Code	Industry Title	2017	2026	Net Growth	Annualized	Average Weekly Salary
Pinehurst-Rockingham	000670	Self Employed and Unpaid Family Workers, All Jobs	3,955	4,070	115	0.3%	*
Pinehurst-Rockingham	110000	Agriculture, Forestry, Fishing and Hunting	540	522	-18	-0.4%	$631
Pinehurst-Rockingham	210000	Mining	146	115	-31	-2.6%	$1,178
Pinehurst-Rockingham	220000	Utilities	263	263	0	0.0%	$1,765
Pinehurst-Rockingham	**230000**	**Construction**	**2,502**	**2,923**	**421**	**1.7%**	**$883**
Pinehurst-Rockingham	**310000**	**Manufacturing**	**7,998**	**8,283**	**285**	**0.4%**	**$753**
Pinehurst-Rockingham	420000	Wholesale Trade	793	822	29	0.4%	$947
Pinehurst-Rockingham	**440000**	**Retail Trade**	**7,441**	**7,922**	**481**	**0.7%**	**$480**
Pinehurst-Rockingham	480000	Transportation and Warehousing	1,207	1,150	-57	-0.5%	$902
Pinehurst-Rockingham	510000	Information	400	410	10	0.3%	$1,090
Pinehurst-Rockingham	520000	Finance and Insurance	1,033	986	-47	-0.5%	$1,102
Pinehurst-Rockingham	530000	Real Estate and Rental and Leasing	574	630	56	1.0%	$763
Pinehurst-Rockingham	540000	Professional, Scientific, and Technical Services	*	*	*	1.3%	$1,099
Pinehurst-Rockingham	550000	Management of Companies and Enterprises	R	*	*	0.6%	$1,210
Pinehurst-Rockingham	560000	Administrative and Support and Waste Management and Remediation Servic	2,389	2,385	-4	0.0%	$615
Pinehurst-Rockingham	610000	Educational Services	5,250	5,247	-3	0.0%	$712
Pinehurst-Rockingham	**620000**	**Health Care and Social Assistance**	**11,806**	**13,407**	**1,601**	**1.4%**	**$937**
Pinehurst-Rockingham	710000	Arts, Entertainment, and Recreation	1,260	1,245	-15	-0.1%	$394
Pinehurst-Rockingham	**720000**	**Accommodation and Food Services**	**6,971**	**7,465**	**494**	**0.8%**	**$322**
Pinehurst-Rockingham	810000	Other Services (except Government)	2,367	2,527	160	0.7%	$600
Pinehurst-Rockingham	900000	Government	3,905	3,971	66	0.2%	*
			60,800	**64,343**	**3,543**	**0.6%**	

Employment Projections by Occupation

Area Name	SOC	Occupation Title	2017	2026	Net Growth	Annualized	2018 Median Income
Pinehurst-Rockingham	00-0000	Total, All Occupations	62,694	66,442	3,748	0.6%	$30,162
Pinehurst-Rockingham	11-0000	Management Occupations	2,890	2,952	62	0.2%	$90,358
Pinehurst-Rockingham	13-0000	Business and Financial Operations Occupations	1,607	1,720	113	0.8%	$60,067
Pinehurst-Rockingham	15-0000	Computer and Mathematical Occupations	595	668	73	1.3%	$57,943
Pinehurst-Rockingham	17-0000	Architecture and Engineering Occupations	452	481	29	0.7%	$69,381
Pinehurst-Rockingham	19-0000	Life, Physical, and Social Science Occupations	272	295	23	0.9%	$52,930
Pinehurst-Rockingham	21-0000	Community and Social Service Occupations	1,216	1,367	151	1.3%	$41,671
Pinehurst-Rockingham	23-0000	Legal Occupations	191	210	19	1.1%	$49,835
Pinehurst-Rockingham	25-0000	Education, Training, and Library Occupations	3,896	4,047	151	0.4%	$39,297
Pinehurst-Rockingham	27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	625	655	30	0.5%	$33,491
Pinehurst-Rockingham	**29-0000**	**Healthcare Practitioners and Technical Occupations**	**4,800**	**5,339**	**539**	**1.2%**	**$58,325**
Pinehurst-Rockingham	**31-0000**	**Healthcare Support Occupations**	**3,305**	**3,747**	**442**	**1.4%**	**$27,102**
Pinehurst-Rockingham	33-0000	Protective Service Occupations	1,429	1,426	-3	0.0%	$34,627
Pinehurst-Rockingham	**35-0000**	**Food Preparation and Serving Related Occupations**	**5,987**	**6,477**	**490**	**0.9%**	**$19,427**
Pinehurst-Rockingham	37-0000	Building and Grounds Cleaning and Maintenance Occupations	2,648	2,810	162	0.7%	$20,956
Pinehurst-Rockingham	**39-0000**	**Personal Care and Service Occupations**	**2,448**	**2,772**	**324**	**1.4%**	**$21,003**
Pinehurst-Rockingham	**41-0000**	**Sales and Related Occupations**	**7,160**	**7,410**	**250**	**0.4%**	**$21,954**
Pinehurst-Rockingham	43-0000	Office and Administrative Support Occupations	7,772	7,885	113	0.2%	$31,118
Pinehurst-Rockingham	45-0000	Farming, Fishing, and Forestry Occupations	426	419	-7	-0.2%	$31,865
Pinehurst-Rockingham	**47-0000**	**Construction and Extraction Occupations**	**2,419**	**2,708**	**289**	**1.3%**	**$37,095**
Pinehurst-Rockingham	**49-0000**	**Installation, Maintenance, and Repair Occupations**	**2,841**	**3,081**	**240**	**0.9%**	**$42,644**
Pinehurst-Rockingham	51-0000	Production Occupations	5,898	5,985	87	0.2%	$27,887
Pinehurst-Rockingham	53-0000	Transportation and Material Moving Occupations	3,817	3,988	171	0.5%	$26,182

Source: North Carolina Department of Commerce, Labor & Economic Analysis

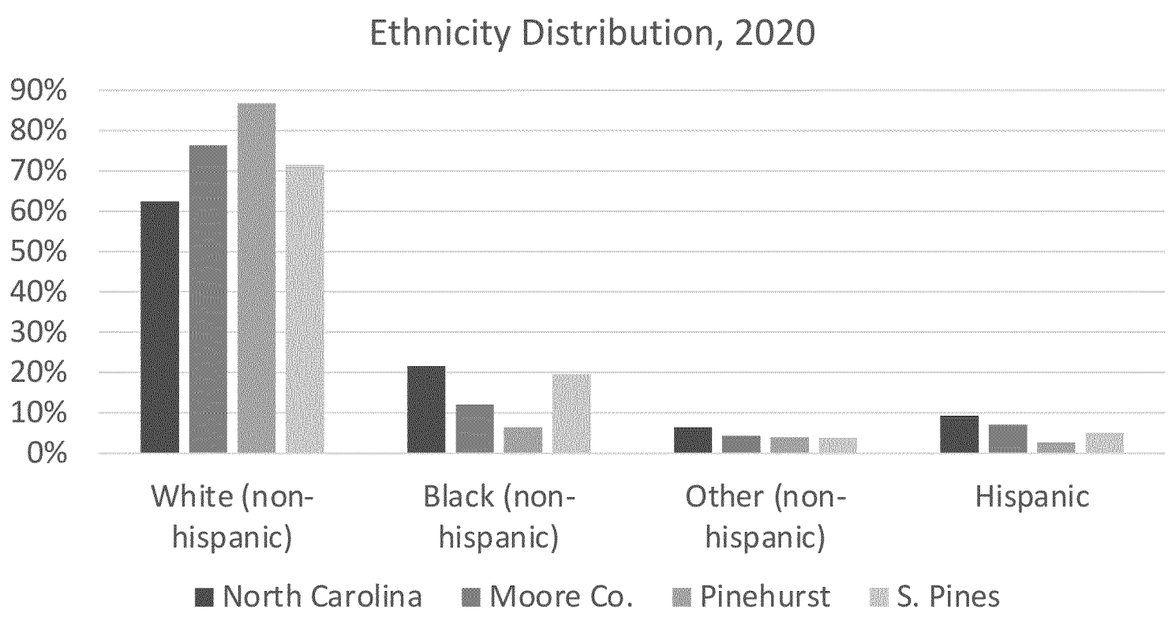
Pinehurst, NC

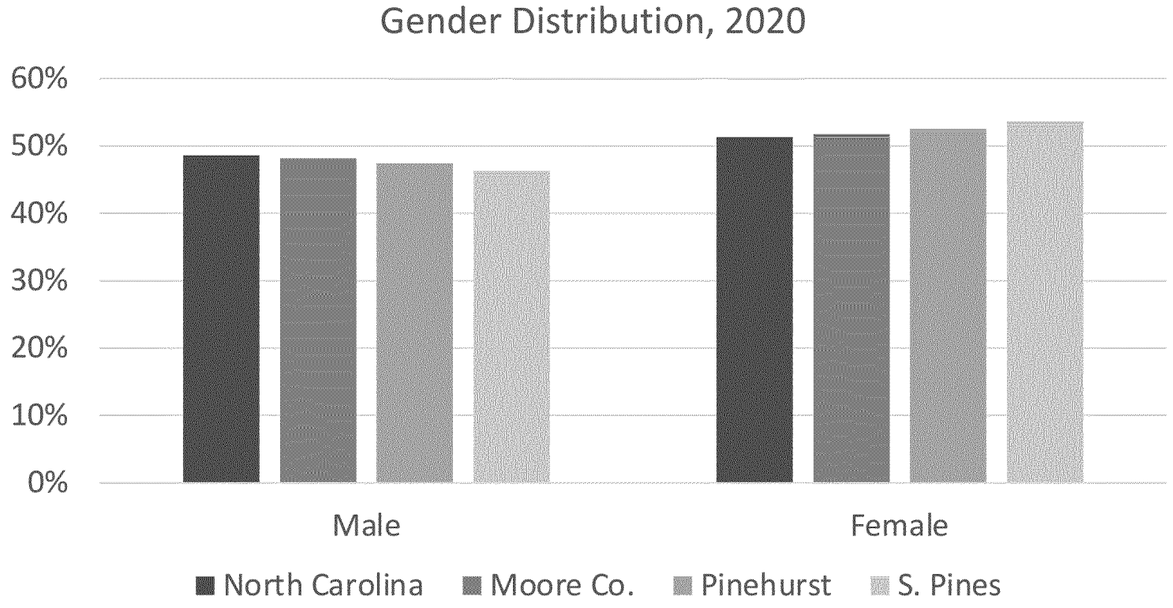
Total Businesses by Establishment Type	Businesses	Percent	Employees	Percent2
Health and Medical Services	306	38.6%	1,659	15.2%
Banks and Financial Institutions	52	6.6%	154	1.4%
Unclassified Establishments	51	6.4%	76	0.7%
Social Services	32	4.0%	85	0.8%
Real Estate	30	3.8%	179	1.6%
Specialty Stores	26	3.3%	101	0.9%
Restaurants	25	3.2%	471	4.3%
Beauty and Barber Shops	20	2.5%	192	1.8%
Membership Organizations	19	2.4%	117	1.1%
Professional Services	17	2.2%	203	1.9%
Entertainment and Recreation Services	16	2.0%	237	2.2%
Hospitals	16	2.0%	3,684	33.8%
Heavy Construction	15	1.9%	62	0.6%
Other Business Services	13	1.6%	43	0.4%
Legal Services	13	1.6%	47	0.4%
General Construction	11	1.4%	48	0.4%
Hotels and Lodging	10	1.3%	2,424	22.2%
Clothing Stores	9	1.1%	24	0.2%
Government	9	1.1%	182	1.7%
Agricultural Services	7	0.9%	28	0.3%
Transportation	7	0.9%	36	0.3%
Auto Dealers and Gas Stations	7	0.9%	126	1.2%
Other Personal Service	7	0.9%	19	0.2%
Other Food Service	6	0.8%	58	0.5%
Insurance Agents and Brokers	6	0.8%	15	0.1%
Computer Services	5	0.6%	26	0.2%
Communications	4	0.5%	16	0.2%
Auto Repair/Services	4	0.5%	8	0.1%
Machinery and Equipment Manufacturing	3	0.4%	10	0.1%
Home Furnishings	3	0.4%	7	0.1%
Bars	3	0.4%	32	0.3%
Dry Cleaning and Laundry	3	0.4%	12	0.1%
Motion Pictures	3	0.4%	10	0.1%
Printing and Publishing	2	0.3%	8	0.1%
Travel Services	2	0.3%	7	0.1%
Durables Wholesale	2	0.3%	9	0.1%
Non Durables Wholesale	2	0.3%	17	0.2%
Building Materials, Hardware and Garden	2	0.3%	30	0.3%
General Merchandise Stores	2	0.3%	19	0.2%
Food Markets	2	0.3%	109	1.0%
Convenience Stores	2	0.3%	9	0.1%
Drug Stores	2	0.3%	17	0.2%
Liquor Stores	2	0.3%	9	0.1%
Oil and Gas	1	0.1%	2	0.0%
Food Manufacturing	1	0.1%	7	0.1%
Textile Mills	1	0.1%	54	0.5%
Paper Manufacturing	1	0.1%	27	0.3%
Other Food Stores	1	0.1%	3	0.0%
Furniture Stores	1	0.1%	4	0.0%
Electronics and Computer Stores	1	0.1%	1	0.0%
Catalog and Direct Sales	1	0.1%	1	0.0%
Miscellaneous Repair Services	1	0.1%	1	0.0%
Primary and Secondary Education	1	0.1%	128	1.2%
Child Care Services	1	0.1%	13	0.1%
Museums and Zoos	1	0.1%	6	0.1%
Colleges and Universities	0	0.0%	15	0.1%

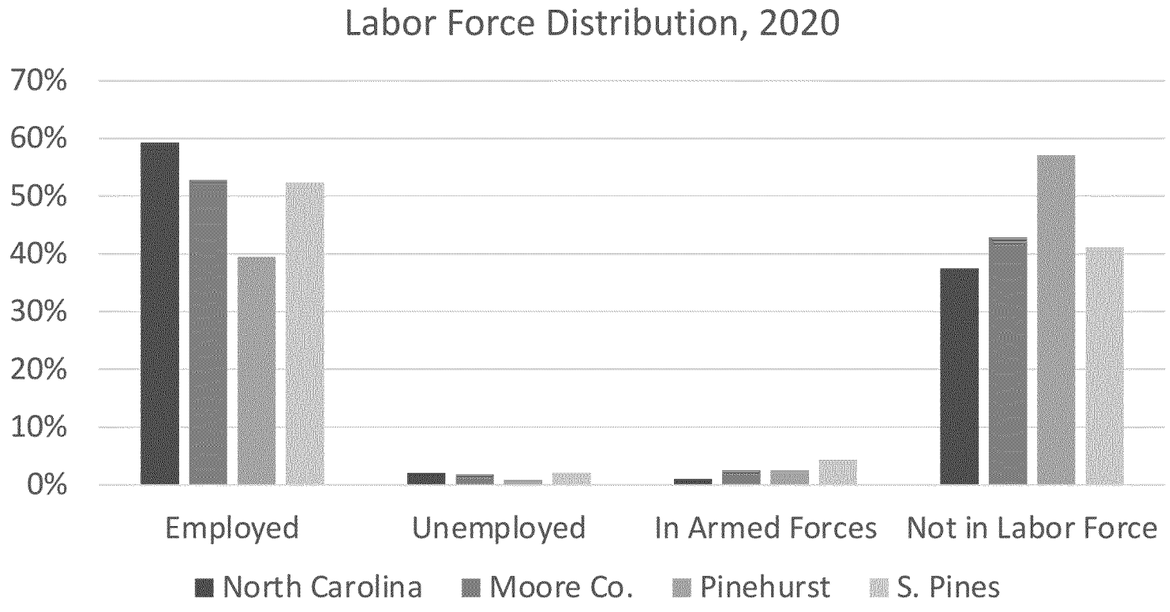
Additional Demographic Data

Total Population							
County	July 2010	July 2015	July 2020	July 2025	July 2030	July 2035	July 2039
Moore	88,587	94,159	102,950	111,534	119,674	127,398	133,292
North Carolina	9,574,293	10,033,079	10,630,691	11,233,133	11,836,070	12,439,269	12,919,921
Moore Co. as a % of NC	0.9%	0.9%	1.0%	1.0%	1.0%	1.0%	1.0%

Source: North Carolina OSBM, Standard Population Estimates, Vintage 2018 and Population Projections, Vintage 2019

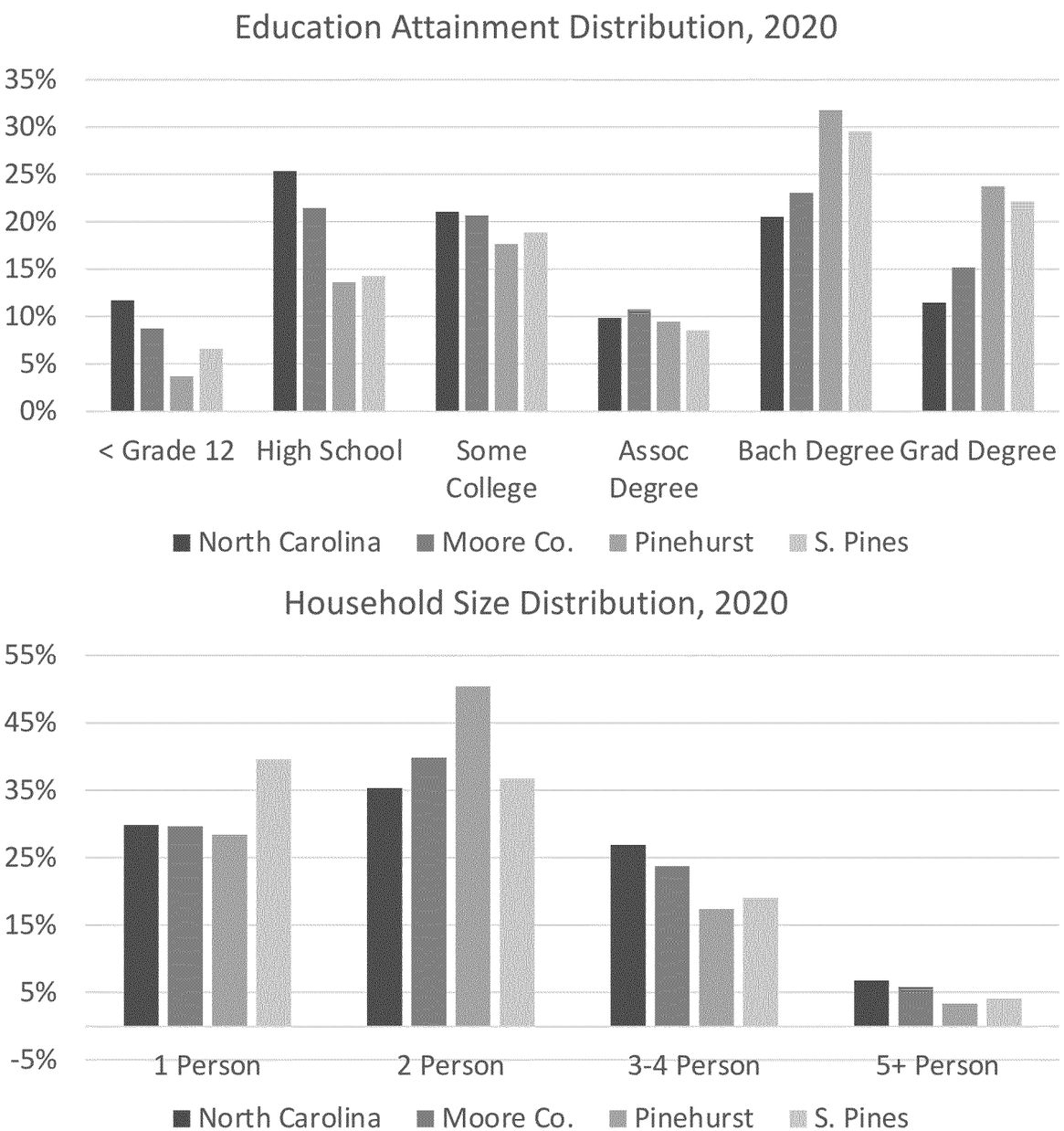






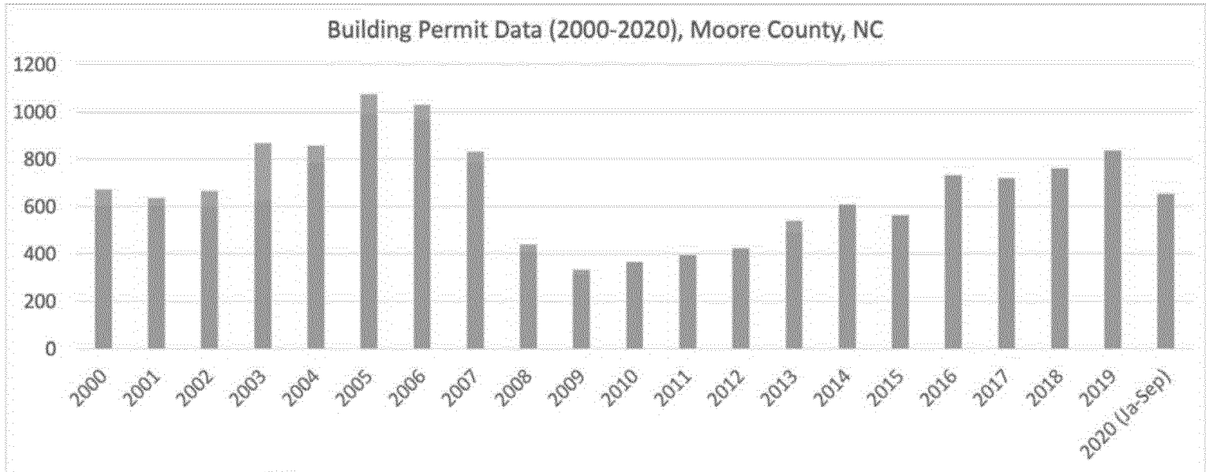
Source: AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis

Additional Demographic Data

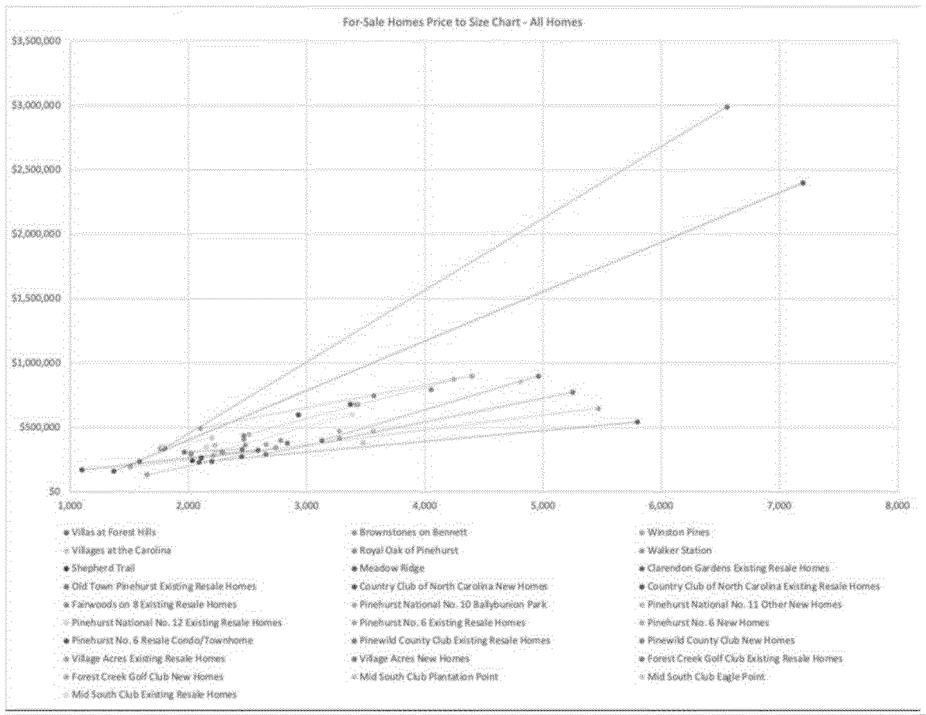


Source: AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis

Additional For-Sale Data



Source: SOCDS database



Source: Duggal Real Estate Advisors

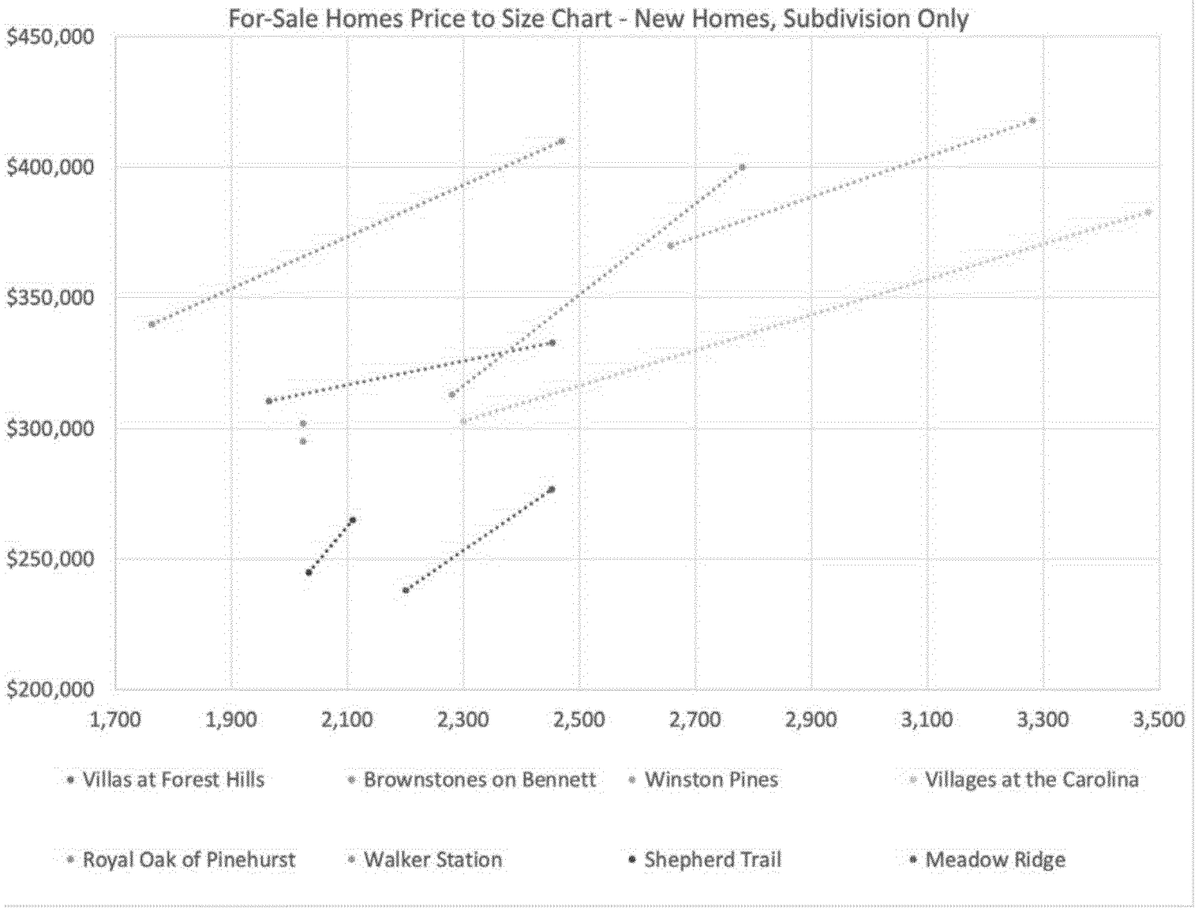
ESTIMATED ANNUAL FOR-SALE DEMAND POTENTIAL
DEMOGRAPHIC TRENDS AND PROJECTIONS: PINEHURST, NC
2020-2025

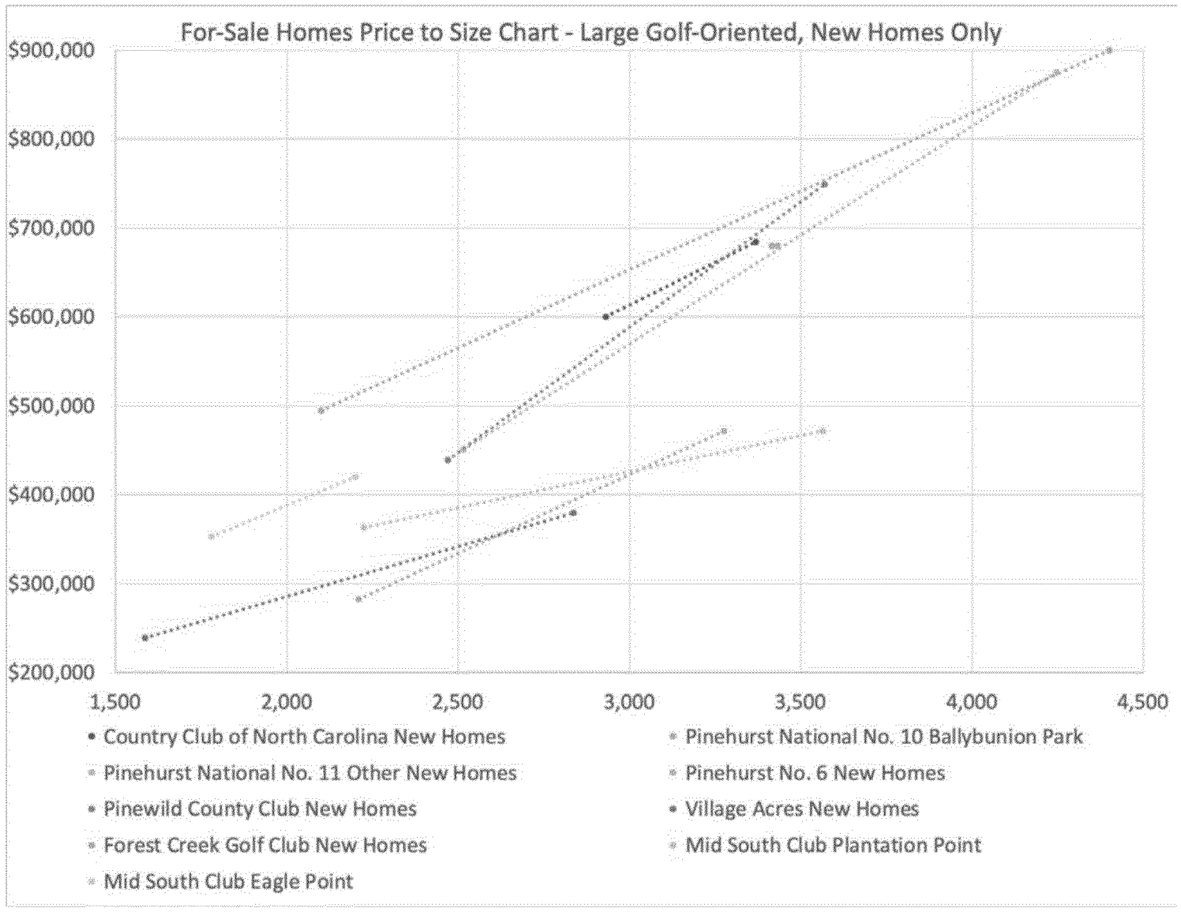
Income: / Home Price [2]:	Below $25,000 Below $90,000	$25,000 $50,000 $90,000 $180,000	$50,000 $75,000 $180,000 $265,000	$75,000 $100,000 $265,000 $350,000	$100,000 $150,000 $350,000 $525,000	$100,000 And Above $525,000 And Above	Total
New Household Growth, 2020-2025							
Total Annual New Households in Pinehurst Village	43	43	43	43	43	43	43
x Distribution of Income [3]	8%	20%	18%	16%	20%	18%	100%
= Income Qualified	4	9	8	7	9	8	43
x OwnerPropensity [3]	90%	83%	86%	84%	87%	86%	85%
=New Households Seeking For-Sale Units	3	7	6	6	7	7	37
Existing Owner Household Annual Turnover							
Total Households in Pinehurst Village [1]	7,885	7,885	7,885	7,885	7,885	7,885	7,885
x Distribution of Income [3]	8%	20%	18%	16%	20%	18%	100.0%
x Owner Propensity [3]	90%	83%	86%	84%	87%	86%	85%
Total Owner Households	577	1,338	1,189	1,033	1,363	1,240	6,742
x Annual Turnover Rate [4]	8.4%	8.4%	8.4%	8.4%	8.4%	8.4%	8.4%
=Demand From Existing Households in Turnover	48	112	100	87	115	104	566
Total Annual For-Sale Demand By Price Range	52	120	106	92	122	111	603
x Preference for/Ability to Deliver New [4]	0%	5%	15%	20%	20%	20%	14%
= Annual Demand for New Homes from Residents	0	6	16	18	24	22	87
x Estimate of Sales that are Second Homes [3]	0%	0%	11%	12%	12%	12%	12%
= Annual Demand for New Second Homes	0	0	2	3	3	3	11
Total Annual For-Sale Demand for New Homes	**0**	**6**	**18**	**21**	**28**	**25**	**98**

[1] AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis for 2020-2025
[2] Based on bankrate.com mortgage calculator, utilizing a 30 year fixed loan with a 4.5% interest rate.
[3] American Community Survey, 2018, 5 year estimates for Pinehurst Village, NC. Table S0701 and B25118.
[4] Based on new home sales as a percentage of total home sales in Pinehurst from 2018 - 2020 from Zillow.com.

SOURCE: Duggal Real Estate Advisors, American Community Survey, AccessNC, Zillow.com, Bankrate.com

Additional For-Sale Data





Source: Duggal Real Estate Advisors

For-Sale Community Data

Community/Neighborhood Name	Neighborhood/Section Name	Address	Orientation	Home Type	Developer/Builder(s)	No. Homes	Approx. Year Started	Homes Sold	Approx. Annual Sales Pace	Home Price Range	Avg. Home Price	Home Size Range	Avg. Home Size	$/SF Range	Avg. $/SF	Lot Size Range (SF)	Avg. Lot Size (SF)	Lot Price Range	Avg. Lot Price	Avg. Lot Price Per Acre	Other
Pinehurst South Cottages	Planned project	Blake Boulevard, Pinehurst, NC	Subdivision	SFD	The Cottages at Legacy Lakes	38	Planned	n/a	n/a	n/a - n/a	n/a	1,800 - 2,400	2,100	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
Villas at Forest Hills	Villas at Forest Hills	130 Whistling Straight Rd, Pinehurst, NC	Subdivision	Attached Villa	McKee Homes	70	Aug-18	29	12	$310,500 - $332,792	$321,646	1,965 - 2,453	2,209	$158 - $136	$146	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
Brownstones on Bennett	Brownstones on Bennett	Brownstone Lane, Southern Pines, NC	Subdivision	TH	McKee Homes	n/a	Jun-18	9	5	$340,000 - $410,000	$375,000	1,763 - 2,469	2,116	$193 - $166	$177	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
Winston Pines	Winston Pines	Winston Pines Drive, Pinehurst, NC	Subdivision	SFD	Caviness & Cates Communities	27	Sep-19	15	15	$370,000 - $417,900	$389,250	2,657 - 3,281	2,969	$139 - $127	$131	21,780 - 87,120	21,780	$45,000 - $50,000	$47,500	$95,000	
Villages at the Carolina	Villages at the Carolina	515 Ave of the Carolinas, Whispering Pines,	Subdivision	SFD	HH Homes	75	Dec-17	65	22	$302,900 - $382,900	$342,900	2,300 - 3,480	2,890	$132 - $110	$119	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
Royal Oak of Pinehurst	Royal Oak of Pinehurst	121 Lark Drive, Pinehurst, NC 28374	Subdivision	Attached Villa	Caviness & Cates Communities	40	Aug-20	0	n/a	$295,000 $302,000	$298,500	2,023 - 2,023	2,023	$146 - $149	$148	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
Walker Station	Walker Station	65 Station Avenue, Pinehurst, NC	TND	SFD	Red/Brand	70	Dec-17	35	12	$313,000 - $400,000	$338,000	2,280 - 2,780	2,530	$137 - $144	$134	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
Shepherd Trail	Shepherd Trail	Shepherd Trail & Roseland Rd, Aberdeen, N	Subdivsion	SFD	GMC Construction	50+/-	Oct-18	26	13	$245,000 - $265,000	$255,000	2,033 - 2,109	2,071	$121 - $126	$123	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
Meadow Ridge	Meadow Ridge	Whitney Dr, Aberdeen, NC 28315	Subdivsion	SFD	HH Homes	100	Jan-18	100	33	$238,000 - $276,859	$257,430	2,200 - 2,452	2,326	$108 - $113	$111	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
Clarendon Gardens	Existing Resale Homes	Clarendon Lane, Pinehurst, NC 28374	Subdivision	SFD	n/a	170	2000	100	6	$233,000 - $545,000	$379,786	2,089 - 5,800	3,090	$112 - $94	$123	n/a - n/a	28,750	n/a - n/a	$54,500	$82,576	Can be a member of Pinehurst Country Club
Old Town Pinehurst	Existing Resale Homes	Pinehurst, NC	Old town	SFD	n/a	n/a	n/a	n/a	35	$339,000 - $2,989,999	$518,000	1,799 - 6,556	2,831	$188 - $456	$183	12,197 - 15,682	13,939	$135,000 - $245,000	$190,000	n/a	
Country Club of North Carolina		1600 Morganton Rd, Pinehurst, NC 28374	Golf, Water, Gated		Custom Homes		1969														2 golf courses - Dogwood & Cardinal
	New Homes (East Lake & Royal Dornoch)		Lake	SFD	Huntley Design Build	40	n/a	n/a	2	$600,000 - $684,500	$397,611	2,930 - 3,369	3,150	$205 - $203	$183	13,068 - 74,052	43,560	$145,000 - $145,000	$145,000	$145,000	
	Existing Resale Homes		Varies	SFD	Custom Homes	n/a	n/a	n/a	36	$163,000 - $2,400,000	$580,000	1,368 - 7,198	3,791	$119 - $333	$153	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	Golf Lots		Golf	Lots	n/a	n/a	n/a	n/a	6	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	54,450 54,450	54,450	$175,000 - $315,000	$245,000	$196,000	
	Water Lots		Water	Lots	n/a	n/a	n/a	n/a	Above	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	10,890 - 14,375	12,632	$135,000 - $270,000	$202,500	$698,276	
	Wooded Lots		Woods	Lots	n/a	n/a	n/a	n/a	Above	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	236,095 261,360	248,728	$170,000 - $299,000	$234,500	$41,068	
Fairwoods on 7		14 Inverrary Rd, Pinehurst, NC 28374	Golf, Gated	SFD	Custom Homes							3,500 5,500									Frontage on Pinehurst No. 2, No. 4, and No. 7
	Existing Resale Homes		Golf	SFD	Custom Homes	n/a	n/a	n/a	20	$365,000 - $798,000	$668,000	2,481 - 4,053	3,800	$147 - $197	$176	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	Golf Lots		Golf	Lots	n/a	n/a	n/a	n/a	4	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	34,412 - 37,026	35,719	$82,500 - $390,000	$164,813	$200,991	
Pinehurst National No. 9		1 Royal Troon Dr, Pinehurst, NC 28374	Golf, Gated		Custom Homes																
	Ballybunion Park		Golf	SFD	Huntley Design Build	26	2017	11	3	$680,000 - $680,000	$680,000	3,415 - 3,432	3,424	$199 - $198	$199	7,405 - 12,632	7,405	$93,750 - $127,500	$116,833	$687,255	Pinehurst CC Membership included with
	Other New Homes		Varies	SFD	Homes by Dickerson	n/a	n/a	n/a	5	$450,542 - $875,000	$662,771	2,514 - 4,246	3,380	$179 - $206	$196	n/a - n/a	n/a	n/a - n/a	n/a	n/a	lot purchase ($45K value)
	Existing Resale Homes		Varies	SFD	Pinehurst Homes, Inc.	n/a	n/a	n/a	14	$350,000 - $855,000	$602,500	2,150 - 4,807	3,479	$163 - $178	$173	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	Golf Lots		Golf	Lots	n/a	n/a	n/a	n/a	12	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	7,840 - 8,712	14,000	$90,000 - $703,000	$255,083	$793,674	
	Wooded Lots		Woods	Lots	n/a	n/a	n/a	n/a	4	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	27,443 - 28,314	27,878	$60,000 - $62,500	$61,000	$95,313	
Pinehurst No. 6		97 Juniper Creek Blvd, Pinehurst, NC 28374	Golf		n/a																Can be a member of Pinehurst Country Club
	Existing Resale Homes		Varies	SFD	n/a				73	$197,500 - $650,000	$287,000	1,510 - 5,467	2,432	$131 - $119	$118	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	New Homes		Varies	SFD	Goneau Construction	n/a	n/a	n/a	18	$283,000 - $471,800	$377,400	2,210 - 3,276	2,743	$128 - $144	$136	13,068 - 13,068	13,068	$13,000 - $45,000	$31,333	$104,444	
	Resale Condo/Townhome		Varies	Attached	n/a	n/a	n/a	n/a	12	$172,000 - $325,000	$248,500	1,100 - 2,590	1,845	$156 - $125	$141	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	Golf Lots		Golf	Lots	n/a	n/a	n/a	n/a	3	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	12,197 - 14,375	13,286	$72,000 - $100,000	$81,333	$266,667	
	Wooded Lots		Woods	Lots	n/a	n/a	n/a	n/a	5	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	10,890 - 16,117	13,504	$3,500 - $38,000	$22,100	$71,290	
Pinewild County Club		4 Glasgow Dr, Pinehurst, NC 28374	Golf, Gated																		Membership not required
	Existing Resale Homes		Varies, Mainly Golf	SFD	n/a	n/a	n/a	n/a	56	$295,000 - $775,000	$535,000	2,654 - 5,250	3,952	$111 - $148	$129	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	New Homes		Varies, Mainly Golf	SFD	Kirby Construction	n/a	n/a	n/a	5	$439,000 - $749,000	$560,000	2,470 - 3,569	3,020	$178 - $210	$194	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	Golf Lots		Golf	Lots	n/a	n/a	n/a	n/a	13	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	30,492 - 47,480	38,986	$60,500 - $99,000	$79,750	$89,106	
	Wooded Lots		Woods	Lots	n/a	n/a	n/a	n/a	9	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	21,780 - 43,560	32,670	$25,000 - $40,000	$32,500	$43,333	
Village Acres		Pinehurst, NC	Golf, Mainly Non	SFD			1985														
	Existing Resale Homes		Varies	SFD	n/a	n/a	n/a	n/a	86	$134,000 - $345,000	$239,500	1,650 - 2,740	2,195	$81 - $126	$104	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	New Homes		Varies	SFD	Elite Home Builders	n/a	n/a	n/a	11	$239,000 $380,000	$309,500	1,586 2,837	2,212	$151 - $134	$142	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	Wooded Lots		Woods	Lots	n/a	n/a	n/a	n/a	3	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	10,888 - 14,375	12,631	$24,000 - $40,100	$32,050	$110,528	
Forest Creek Golf Club	Forest Creek Golf Club	200 Meyer Farm Drive	Golf, Gated	SFD	Huntley Design Build	750	1996														2 Tom Fazio Courses
	Existing Resale Homes		Golf	SFD		n/a	n/a	n/a	18	$400,000 - $900,000	$650,000	3,129 - 4,960	4,045	$128 - $181	$161	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	New Homes		Golf	SFD		n/a	n/a	n/a	5	$495,000 - $900,000	$652,200	2,100 - 4,400	3,250	$236 - $205	$220	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	Golf Lots		Golf	Lots		n/a	n/a	n/a	17	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	16,117 - 44,431	30,492	$65,000 - $300,000	$118,294	$168,992	
	Wooded Lots		Golf	Lots		n/a	n/a	n/a	5	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	24,394 - 40,946	39,204	$27,000 - $60,000	$43,500	$48,333	
Mid South Club		1 Palmer Drive, Southern Pines, NC																			
	Plantation Point		Golf/Wooded	SFD	McKee Homes	n/a	n/a	n/a	7	$363,285 - $472,116	$417,701	2,225 - 3,564	2,895	$163 - $132	$148	n/a - n/a	n/a	n/a - $195,000	n/a	n/a	
	Eagle Point		Golf	SFD	McKee Homes	n/a	n/a	n/a	6	$353,000 - $420,000	$386,500	1,780 - 2,200	1,990	$198 - $191	$195	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	Existing Resale Homes		Varies	SFD	n/a	n/a	n/a	n/a	15	$312,000 - $602,000	$457,000	2,226 - 3,384	2,805	$140 - $178	$159	n/a - n/a	n/a	n/a - n/a	n/a	n/a	
	Golf Lots		Golf	Lots	n/a	n/a	n/a	n/a	3	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	23,958 - 31,363	27,661	$92,000 - $175,000	$122,333	$192,651	
	Semi-Golf Lots		Semi-Golf	Lots	n/a	n/a	n/a	n/a	4	n/a - n/a	n/a	n/a - n/a	n/a	n/a - n/a	n/a	19,166 - 28,314	23,740	$60,000 - $85,000	$74,250	$136,239	

Source: Duggal Real Estate Advisors

Additional For-Rent Residential Data

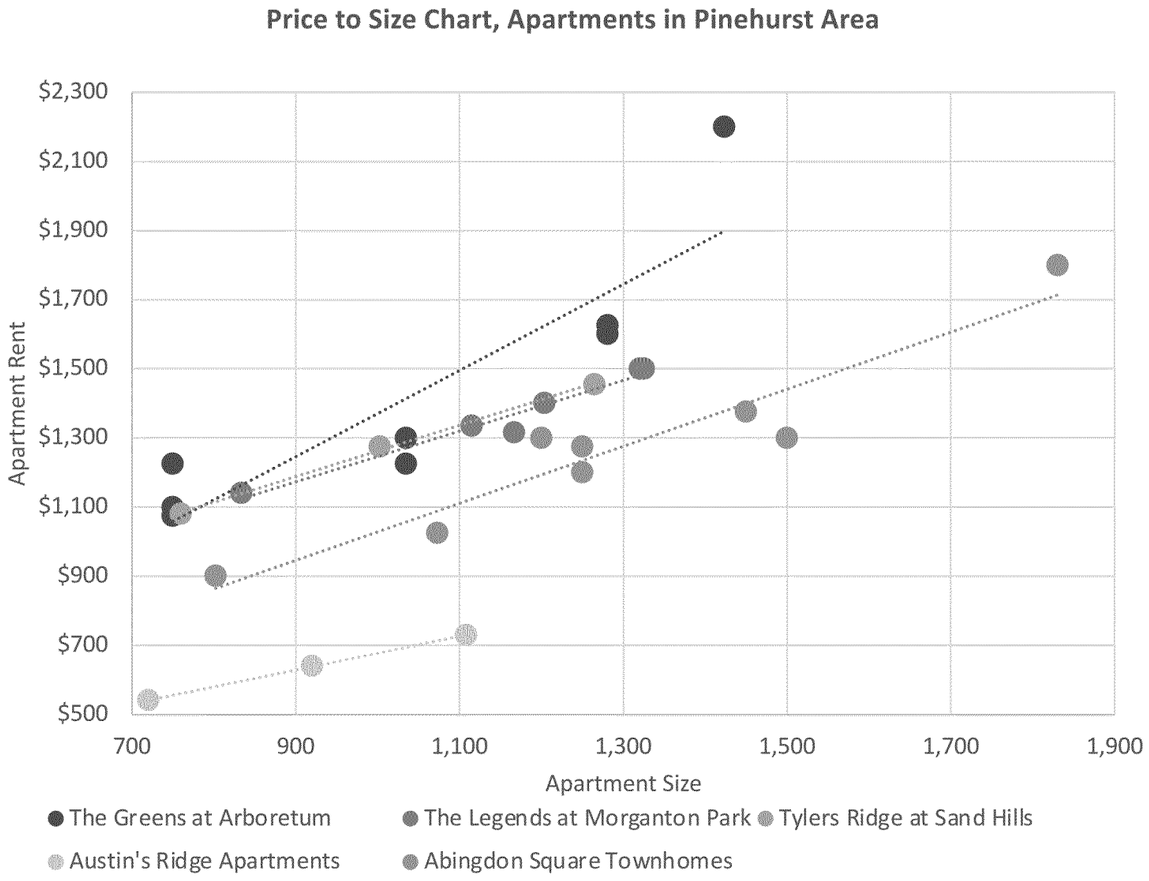
Detailed apartment data.

Apartment Name	Phone	Address	Year Built	No. Units	Available Units	Occupancy	Stories	Unit Type	Size	Base Rent	$/SF	Utilities Included	Surface Parking	Garage Parking	Garage Parking Cost	Amenities						Features		
																Elevator	Clubhouse	Pool	Fitness Cnt	Grills	Hardwood	W/D in Unit	Granite	Stainless
The Greens at Arboretum	910-621-1600	205 McCaskill Rd E, Pinehurst, NC 28374	May-18	72	2	97%	4	Average	1,038	$1,419	$1.37	None	90	25	$150	Y	Y	Y	Y	Y	Y	Y	Y	Y
			8 months to lease-up					1B/1b	750	$1,075	$1.43	Residents												
			5.5 per month first 4 months					1B/1b	750	$1,100	$1.47	pay $25												
			11 per month last 4 months					1B/1b	750	$1,225	$1.63	for trash												
								2B/2b	1,035	$1,225	$1.18													
								2B/2b	1,035	$1,300	$1.26													
								3B/2b	1,281	$1,600	$1.25													
								3B/2b	1,281	$1,625	$1.27													
								3B/2b	1,423	$2,200	$1.55													
The Legends at Morganton Park	910-600-0292	500 Legends Dr, Southern Pines, NC 28387	2015	288	8	97%	3	Average	1,161	$1,365	$1.18	Trash	1 per/unit	50	$150	N	Y	Y	Y	Y	Y	Hookup	Y	Y
								1B/1b	834	$1,140	$1.37	Cable												
								2B/2b	1,167	$1,315	$1.13													
								2B/2b	1,115	$1,335	$1.20													
								2B/2b	1,204	$1,400	$1.16													
								3B/2b	1,325	$1,500	$1.13													
								3B/2b	1,320	$1,500	$1.14													
Tylers Ridge at Sand Hills	910-947-1211	500 Moonseed Lane, Carthage, NC 28327	2013	216	0	100%	3	Average	1,009	$1,270	$1.26	None	1 per/unit	56	$95-$150	N	Y	Y	Y	Y	Y	Y	Y	Y
								1B/1b	760	$1,080	$1.42													
								2B/2b	1,003	$1,275	$1.27													
								3B/2b	1,265	$1,455	$1.15													
Austin's Ridge Apartments	910-695-0550	501 Austins Ridge Cir, Southern Pines, NC 28387	2013	52	0	100%	2	Average	916	$637	$0.70	Trash	Available	No	n/a	N	N	N	N	N	N	Hookup	N	N
								1B/1b	720	$541	$0.75													
								2B/2b	920	$641	$0.70													
								3B/3b	1,108	$730	$0.66													
Abingdon Square Townhomes	844-556-4437	200 Holly Pines Dr, Pinehurst, NC 28374	1980s to 2012	40	4	90%	2	Average	1,294	$1,272	$0.98	Trash	Available	No	n/a	N	N	N	N	N	Y	Hookup	Y	N
								1B Apt	802	$900	$1.12													
								2B Apt	1,073	$1,025	$0.96													
								2B TH	1,250	$1,200	$0.96													
								2B TH garage	1,250	$1,275	$1.02													
								3B TH	1,200	$1,300	$1.08													
								3B TH garage	1,450	$1,375	$0.95													
								4B TH	1,500	$1,300	$0.87													
								4B TH	1,830	$1,800	$0.98													
Eagles Landing	n/a	US 15-501 & Voit Gilmore Lane, Southern Pines	Under	288	288	n/a	3	1, 2 and 3 B	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Y	Y	Y	Y	n/a	n/a	n/a	n/a	n/a

Source: Duggal Real Estate Advisors, interviews with leasing agents, www.apartments.com

Additional For-Rent Residential Data

Price to size chart for apartment projects in area.



Source: Duggal Real Estate Advisors, www.apartments.com

Detailed rental demand.

ESTIMATED ANNUAL RENTAL DEMAND POTENTIAL
DEMOGRAPHIC TRENDS AND PROJECTIONS: PINEHURST, NC
2020-2025

Income:	Below $25,000	$25,000 $50,000	$50,000 $75,000	$75,000 $100,000	$100,000 $150,000	$150,000 And above	
% Spent on Rent [3]:	50%	35%	28%	24%	16%		
Rent [2]:	Below $1,000	$1,000 $1,500	$1,500 $1,800	$1,800 $2,000	$2,000 $2,000	$2,000 and above	
SOURCES OF DEMAND							TOTAL
New Household Growth, 2020-2025							
Total Annual New Households in Pinehurst [1]	43	43	43	43	43	43	43
x Distribution of Income [3]	8%	20%	18%	16%	20%	18%	100%
= Income Qualified	4	9	8	7	9	8	43
x Renter Propensity [3]	10%	17%	14%	16%	13%	14%	15%
=New Households Seeking Rental Units	0	2	1	1	1	1	6
Existing Renter Household Annual Turnover							
Total Households in Pinehurst Village [1]	7,885	7,885	7,885	7,885	7,885	7,885	7,885
x Distribution of Income [3]	8%	20%	18%	16%	20%	18%	100%
x Renter Propensity [3]	10%	17%	14%	16%	13%	14%	15%
Total Renter Households	65	276	193	201	198	210	1,143
x Annual Turnover Rate [3]	45%	45%	45%	45%	45%	45%	45%
=Demand From Existing Households in Turnover	29	124	87	91	89	95	515
Annual Rental Demand By Rent Range	**30**	**125**	**88**	**92**	**90**	**96**	**521**
Preference for New [4]	4%	4%	4%	4%	4%	4%	4%
Annual Rental Demand for New Apartments	1	5	4	4	4	4	21

[1] AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis for 2020-2025
[2] Based on bankrate.com mortgage calculator, utilizing a 30 year fixed loan with a 4.5% interest rate.
[3] American Community Survey, 2018, 5 year estimates for Pinehurst Village, NC. Table S0701 and B25118.
[4] Based on building permit data in Moore County.

SOURCE: Duggal Real Estate Advisors, AccessNC, American Community Survey

Additional Retail Data

RETAIL DEMAND ANALYSIS
PINEHURST VILLAGE

	2020	Growth to 2025
Households within Pinehurst in 2020 and Growth to 2025 [8]	7,885	215

Industry Summary	Demand Potential [1]	Supply (Sales) [2]	Gross Retail Gap/(Surplus) [3]	Existing Number of Businesses [4]	Sales/SF Threshold [5]	Additional Supportable Square Footage by Existing HH [6]	Additional Supportable Square Footage by New HH [7]	Total Additional Supportable Square Footage	Leakage in Moore County as well? [9]
Motor Vehicle & Parts Dealers (NAICS 441)	**$70,191,270**	**$26,479,308**	**$43,711,962**	**4**		**79,461**	**3,271**	**82,732**	**Y**
Automobile Dealers (NAICS 4411)	$57,567,778	$21,964,846	$35,602,932	1	$750	47,471	1,999	49,469	Y
Other Motor Vehicle Dealers (NAICS 4412)	$5,601,306	$4,097,238	$1,504,068	2	$270	5,571	540	6,111	Y
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	$7,022,186	$417,224	$6,604,962	1	$250	26,420	731	27,151	Y
Furniture & Home Furnishings Stores (NAICS 442)	**$12,985,172**	**$1,925,456**	**$11,059,716**	**3**		**47,572**	**1,460**	**49,032**	**Y**
Furniture Stores (NAICS 4421)	$7,665,583	$1,241,584	$6,423,999	1	$200	32,120	998	33,118	Y
Home Furnishings Stores (NAICS 4422)	$5,319,589	$683,872	$4,635,717	2	$300	15,452	462	15,914	N
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	**$9,738,807**	**$2,397,863**	**$7,340,944**	**2**	**$500**	**14,682**	**507**	**15,189**	**N**
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	**$24,762,681**	**$5,480,591**	**$19,282,090**	**3**		**64,274**	**2,150**	**66,423**	**Y**
Building Material and Supplies Dealers (NAICS 4441)	$23,317,941	$5,480,591	$17,837,350	3	$300	59,458	2,024	61,482	Y
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$1,444,740	$0	$1,444,740	0	$300	4,816	125	4,941	N
Food & Beverage Stores (NAICS 445)	**$54,688,000**	**$35,472,287**	**$19,215,713**	**6**		**38,822**	**2,860**	**41,682**	**N**
Grocery Stores (NAICS 4451) [6]	$50,717,423	$35,018,360	$15,699,063	4	$500	31,398	2,642	34,040	N
Specialty Food Stores (NAICS 4452)	$1,957,199	$199,862	$1,757,337	1	$500	3,515	102	3,617	N
Beer, Wine, and Liquor Stores (NAICS 4453)	$2,013,378	$254,065	$1,759,313	1	$450	3,910	117	4,026	Y
Health & Personal Care Stores (NAICS 446/NAICS 4461)	**$22,089,945**	**$4,373,353**	**$17,716,592**	**5**	**$350**	**50,619**	**1,644**	**52,262**	**N**
Gasoline Stations (NAICS 447/NAICS 4471)	**$33,456,151**	**$9,336,612**	**$24,119,539**	**3**	**$600**	**40,199**	**1,452**	**41,651**	**Y**
Clothing and Clothing Accessories Stores (NAICS 448)	**$15,042,064**	**$5,608,123**	**$9,433,941**	**9**		**24,803**	**1,046**	**25,849**	**Y**
Clothing Stores (NAICS 4481)	$9,745,848	$3,877,872	$5,867,976	5	$330	17,782	769	18,551	Y
Shoe Stores (NAICS 4482)	$2,269,760	$841,162	$1,428,598	1	$360	3,968	164	4,133	Y
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$3,026,456	$889,089	$2,137,367	3	$700	3,053	113	3,166	Y
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	**$8,444,362**	**$2,598,290**	**$5,846,072**	**2**		**23,384**	**880**	**24,264**	**Y**
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$7,193,736	$2,598,290	$4,595,446	2	$250	18,382	749	19,131	Y
Book, Periodical, and Music Stores (NAICS 4512)	$1,250,626	$0	$1,250,626	0	$250	5,003	130	5,133	N
General Merchandise Stores (NAICS 452)	**$52,232,311**	**$1,925,451**	**$50,306,860**	**2**		**143,734**	**3,886**	**147,620**	**Y**
Department Stores Excluding Leased Depts. (NAICS 4521)	$37,767,835	$0	$37,767,835	0	$350	107,908	2,810	110,718	N
Other General Merchandise Stores (NAICS 4529)	$14,464,476	$1,925,451	$12,539,025	2	$350	35,826	1,076	36,902	Y
Miscellaneous Store Retailers (NAICS 453)	**$13,990,158**	**$2,787,277**	**$11,202,881**	**14**		**40,656**	**1,337**	**41,993**	**Y**
Florists (NAICS 4531)	$487,044	$200,747	$286,297	1	$300	954	42	997	N
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$3,028,809	$797,231	$2,231,578	2	$250	8,926	316	9,242	Y
Used Merchandise Stores (NAICS 4533)	$1,613,216	$518,252	$1,094,964	2	$200	5,475	210	5,685	N
Other Miscellaneous Store Retailers (NAICS 4539)	$8,861,089	$1,271,047	$7,590,042	9	$300	25,300	769	26,069	Y
Nonstore Retailers (NAICS 454)	**$5,584,121**	**$457,886**	**$5,126,235**	**1**					
Electronic Shopping & Mail-Order Houses (NAICS 4541)	$4,071,373	$457,886	$3,613,487	1	n/a	n/a	n/a	n/a	n/a
Vending Machine Operators (NAICS 4542)	$296,351	$0	$296,351	0	n/a	n/a	n/a	n/a	n/a
Direct Selling Establishments (NAICS 4543)	$1,216,397	$0	$1,216,397	0	n/a	n/a	n/a	n/a	n/a
Food Services & Drinking Places (NAICS 722)	**$34,274,038**	**$23,011,123**	**$11,262,915**	**37**		**23,089**	**1,598**	**24,687**	**Y**
Special Food Services (NAICS 7223)	$276,675	$1,084,805	-$808,130	2	$500	-1,616	14	-1,602	N
Drinking Places - Alcoholic Beverages (NAICS 7224)	$2,587,428	$9,665,700	-$7,078,272	10	$700	-10,112	96	-10,016	N
Restaurants/Other Eating Places (NAICS 7225) [7]	$31,409,935	$12,260,618	$19,149,317	25	$550	34,817	1,487	36,304	Y
	$357,479,080	**$121,853,620**	**$235,625,460**	**91**		**591,295**	**22,090**	**613,385**	**Y**

[1] Demonstrated purchases of households within the designated area from Esri for 2020.

[2] Sales achieved within the designated area from Esri 2020.

[3] Higher sales relative to demand show the impact of outside demand sources which may be underserved and drive farther. Lower sales indiates "leakage" out of the area.

[4] Esri 2020 for Pinehurst.

[5] Bizminer Sales per Square Foot Report and emarketer.com.

[6] Gross Retail Gap (Surplus) divided by sales per square foot by category.

[7] Estimated new household growth times the expenditures by type by household divided by sales per square foot.

[8] Esri.

[9] Esri 2020 data for Moore County, NC.

RETAIL DEMAND ANALYSIS
MOORE COUNTY

	2020	Growth to 2025
Households within Moore County in 2020 and Growth to 2025 [8]	43,651	1,518

Industry Summary	Demand Potential [1]	Supply (Sales) [2]	Gross Retail Gap/(Surplus) [3]	Existing Number of Businesses [4]	Sales/SF Threshold [5]	Additional Supportable Square Footage by Existing HH [6]	Additional Supportable Square Footage by New HH [7]	Total Additional Supportable Square Footage
Motor Vehicle & Parts Dealers (NAICS 441)	**$290,710,331**	**$203,961,441**	**$86,748,890**	**56**		**153,046**	**17,229**	**170,275**
Automobile Dealers (NAICS 4411)	$238,580,945	$166,937,489	$71,643,456	28	$750	95,525	10,546	106,071
Other Motor Vehicle Dealers (NAICS 4412)	$23,444,395	$13,655,799	$9,788,596	7	$270	36,254	2,879	39,133
Auto Parts, Accessories, and Tire Stores (NAICS 4413)	$28,684,991	$23,368,153	$5,316,838	21	$250	21,267	3,804	25,071
Furniture & Home Furnishings Stores (NAICS 442)	**$51,510,667**	**$48,211,765**	**$3,298,902**	**69**		**29,118**	**7,396**	**36,514**
Furniture Stores (NAICS 4421)	$30,832,938	$19,960,075	$10,872,863	17	$200	54,364	5,111	59,475
Home Furnishings Stores (NAICS 4422)	$20,677,729	$28,251,690	-$7,573,961	52	$300	-25,247	2,285	-22,961
Electronics & Appliance Stores (NAICS 443/NAICS 4431)	**$39,298,664**	**$51,716,490**	**-$12,417,826**	**8**	**$500**	**-24,836**	**2,606**	**-22,230**
Bldg Materials, Garden Equip. & Supply Stores (NAICS 444)	**$99,633,080**	**$46,233,469**	**$53,399,611**	**44**		**177,999**	**11,010**	**189,009**
Building Material and Supplies Dealers (NAICS 4441)	$93,474,099	$36,374,542	$57,099,557	26	$300	190,332	10,330	200,662
Lawn and Garden Equipment and Supplies Stores (NAICS 4442)	$6,158,981	$9,858,927	-$3,699,946	18	$300	-12,333	681	-11,653
Food & Beverage Stores (NAICS 445)	**$229,686,553**	**$319,500,364**	**-$89,813,811**	**63**		**-178,879**	**15,289**	**-163,590**
Grocery Stores (NAICS 4451) [6]	$213,326,676	$282,780,279	-$69,453,603	44	$500	-138,907	14,145	-124,762
Specialty Food Stores (NAICS 4452)	$8,301,751	$32,030,028	-$23,728,277	15	$500	-47,457	550	-46,906
Beer, Wine, and Liquor Stores (NAICS 4453)	$8,058,126	$4,690,057	$3,368,069	4	$450	7,485	594	8,078
Health & Personal Care Stores (NAICS 446/NAICS 4461)	**$88,336,763**	**$94,409,330**	**-$6,072,567**	**46**	**$350**	**-17,350**	**8,367**	**-8,983**
Gasoline Stations (NAICS 447/NAICS 4471)	**$142,393,179**	**$114,966,406**	**$27,426,773**	**39**	**$600**	**45,711**	**7,868**	**53,579**
Clothing and Clothing Accessories Stores (NAICS 448)	**$61,691,135**	**$33,482,207**	**$28,208,928**	**56**		**78,759**	**5,493**	**84,252**
Clothing Stores (NAICS 4481)	$40,335,512	$20,225,591	$20,109,921	36	$330	60,939	4,052	64,991
Shoe Stores (NAICS 4482)	$9,608,512	$4,976,445	$4,632,067	4	$360	12,867	885	13,752
Jewelry, Luggage, and Leather Goods Stores (NAICS 4483)	$11,747,111	$8,280,171	$3,466,940	16	$700	4,953	556	5,509
Sporting Goods, Hobby, Book, and Music Stores (NAICS 451)	**$34,755,383**	**$31,659,248**	**$3,096,135**	**45**		**12,385**	**4,609**	**16,993**
Sporting Goods/Hobby/Musical Instrument Stores (NAICS 4511)	$29,524,047	$24,799,326	$4,724,721	40	$250	18,899	3,915	22,814
Book, Periodical, and Music Stores (NAICS 4512)	$5,231,336	$6,859,922	-$1,628,586	5	$250	-6,514	694	-5,821
General Merchandise Stores (NAICS 452)	**$217,649,028**	**$185,916,817**	**$31,732,211**	**34**		**90,663**	**20,616**	**111,280**
Department Stores Excluding Leased Depts. (NAICS 4521)	$156,754,739	$158,089,435	-$1,334,696	11	$350	-3,813	14,848	11,035
Other General Merchandise Stores (NAICS 4529)	$60,894,289	$27,827,382	$33,066,907	23	$350	94,477	5,768	100,245
Miscellaneous Store Retailers (NAICS 453)	**$58,563,260**	**$45,979,593**	**$12,583,667**	**126**		**22,362**	**7,104**	**29,465**
Florists (NAICS 4531)	$1,995,395	$3,359,546	-$1,364,151	16	$300	-4,547	221	-4,327
Office Supplies, Stationery, and Gift Stores (NAICS 4532)	$12,181,526	$6,144,312	$6,037,214	19	$250	24,149	1,615	25,764
Used Merchandise Stores (NAICS 4533)	$6,564,821	$20,730,080	-$14,165,259	44	$200	-70,826	1,088	-69,738
Other Miscellaneous Store Retailers (NAICS 4539)	$37,821,518	$15,745,655	$22,075,863	47	$300	73,586	4,180	77,766
Nonstore Retailers (NAICS 454)	**$23,321,914**	**$13,614,942**	**$9,706,972**	**9**				
Electronic Shopping & Mail-Order Houses (NAICS 4541)	$16,437,103	$3,663,086	$12,774,017	4	n/a	n/a	n/a	n/a
Vending Machine Operators (NAICS 4542)	$1,246,207	$2,322,125	-$1,075,918	1	n/a	n/a	n/a	n/a
Direct Selling Establishments (NAICS 4543)	$5,638,604	$7,629,731	-$1,991,127	4	n/a	n/a	n/a	n/a
Food Services & Drinking Places (NAICS 722)	**$139,738,793**	**$136,686,930**	**$3,051,863**	**216**		**8,139**	**8,303**	**16,442**
Special Food Services (NAICS 7223)	$1,216,238	$1,481,357	-$265,119	8	$500	-530	81	-450
Drinking Places - Alcoholic Beverages (NAICS 7224)	$9,898,561	$16,670,922	-$6,772,361	22	$700	-9,675	469	-9,206
Restaurants/Other Eating Places (NAICS 7225) [7]	$128,623,994	$118,534,651	$10,089,343	186	$550	18,344	7,753	26,097
	$1,477,288,750	**$1,326,339,002**	**$150,949,748**	**811**		**397,116**	**115,890**	**513,007**

[1] Demonstrated purchases of households within the designated area from Esri for 2020.

[2] Sales achieved within the designated area from Esri 2020.

[3] Higher sales relative to demand show the impact of outside demand sources which may be underserved and drive farther. Lower sales indiates "leakage" out of the area.

[4] Esri 2020 for Moore County.

[5] Bizminer Sales per Square Foot Report and emarketer.com.

[6] Gross Retail Gap (Surplus) divided by sales per square foot by category.

[7] Estimated new household growth times the expenditures by type by household divided by sales per square foot.

[8] Esri.

Additional Retail Data

Name	Address	Year Built	Size (SF)	SF Available	Vacancy Rate	Est. Asking Rent (SF/YR)	Type	Major Tenants
Pinecroft Shopping Center	150 Ivey Lane, Pinehurst, NC 28734	2016	86,020	3,800	4.4%	$24	Plus TICAM	Harris Teeter, McDonald's, Rite Aid, First Health, Kung Fu, Domino's, Schneider Stone, Audible, Fantastic Sams, Lee Nail's and Anytime Fitness opening soon.
Pinehurst Plaza	1680 NC Highway 5, Aberdeen, NC 28315	1984	49,446	9,600	19.4%	$6	NNN	Food Lion, Nail City, New China 1680 Restaurant
Pinecrest Plaza	1 Pinecrests Plaza, Southern Pines, NC 28387	Renovated 2014	277,570	5,166	1.9%	n/a	n/a	Belk, Michaels, BAM, Chico's, Talbots, Pier One, Hallmark, Bath & Body Works, Belk Men's Store, Hibbet Sports, Cato, Hair Cuttery, Food Lion, Claire's, The Shoe Department, Rite Aid, GNC, Francesca's, Apricot Lane,
Southern Pines Village	190 Brucewood Rd, Southern Pines, NC 28287	2011	244,793	3,796	1.6%	$20	NNN	Hobby Lobby, Kohl's, Ulta, Dollar Tree, Frozen Yogurt, Beverly Nails, Brixx, Longhorn Steakhouse, Outback Steakhouse, Triangle Wine
Center Park Shopping Center	11109 US Highway 15 501, Aberdeen, NC 28315		113,536	7,720	6.8%	n/a	n/a	Harris Teeter, Dick's, BB&T, McDonalds, Taco Bell, Nails
Sandhill Shopping Center	1800 N Sandhills Blvd, Aberdeen, NC 28315		97,702	17,869	18.3%	$21.5	NNN	Food Lion, Advance Auto Parts, Family Dollar, Dunkin Donuts
Town & Country Shopping Center	1315 N Sandhills Blvd, Aberdeen, NC 28315	1965/2005	77,462	12,752	16.5%	$13 Avg ($8-$20)	NNN	Big Lots, Badcock and More Furniture, Dollar General, Aaron Rents, Tuesday Morning, Texas Roadhouse and Sears Hometown Store









Additional Retail Data



1


246 Olmsted Blvd
Central Park South
Pinehurst, NC

Built in 2005
1,735 SF Retail Space
$20.00 SF/YR

2


150-350 Ivey Ln
PineCroft Shopping Center- Harris
Pinehurst, NC

4 Star | Built in 2016
2,400 SF Retail Space
$24.00 SF/YR

3


2212 Midland Rd
Pinehurst, NC

Built in 1900
1,150 SF Retail Space
$18.26 SF/YR

4


1680 NC Highway 5
Pinehurst Plaza
Aberdeen, NC

Built in 1984
9,600 SF Retail Space
$6.00 SF/YR

5
Restaurant


100 Pavilion Way
The Pavilion at Morganton Park
Southern Pines, NC

Built in 2016
100 - 8,186 SF Spaces
$18.00 - $28.00 SF/YR

6


Brucewood Rd
Southern Pines Village
Southern Pines, NC

Built in 2011
3,500 - 7,796 SF Retail Spaces
$20.00 SF/YR

7


10840 US 15-501 Hwy
Sandhills Commons
Southern Pines, NC

4 Star | Built in 2020
1,700 SF Retail Space
$35.00 SF/YR

8


340 Commerce Ave
Yadkin Plaza
Southern Pines, NC

Built in 2001
1,500 - 7,500 SF Spaces
$12.00 SF/YR

9


375 Pinehurst Ave
Southern Pines, NC

Built in 1984
1,030 SF Retail Space
$11.65 SF/YR

10


170-190 Commerce Ave
Southern Pines, NC

Built in 1999
1,920 - 3,968 SF Spaces
2 Spaces Available Now

11


206-216 Commerce Ave
Yadkin Park
Southern Pines, NC

Built in 1980
650 SF Retail Space
$15.00 SF/YR

12


290 Turner St
Shops on the Green
Southern Pines, NC

Built in 2001
1,000 SF Retail Space
1 Space Available Now

13


1369-1377 N Sandhills Blvd
Town & Country Shopping Center
Aberdeen, NC

Built in 1965
320 - 12,752 SF Retail Spaces
$8.00 - $20.00 SF/YR

14


Airport Rd & Hwy 22
Mill Creek Village
Southern Pines, NC

Built in 2017
1,271 - 2,773 SF Retail Spaces
$20.00 SF/YR

Source: Loopnet, December 1, 2020

Additional Office Data

	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Total 2021-2030
Total Jobs in Moore County [1]	40,352	40,594	40,838	41,083	41,329	41,577	41,827	42,078	42,330	42,584	42,840	
x Projected Annual Growth Rate [2]	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	
= Annual New Jobs in Moore County	242	244	245	246	248	249	251	252	254	256	257	2,502
x Percent of Jobs that are Office Related [3]		40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	
= Annual New Office Jobs in Moore County		97	98	99	99	100	100	101	102	102	103	1,001
x Square Feet of New Office Space Per Employee [4]		200	200	200	200	200	200	200	200	200	200	
= Annual Demand for New Office Space in Moore County		19,485	19,602	19,720	19,838	19,957	20,077	20,197	20,318	20,440	20,563	200,198

[1] Bureau of Labor Statistics

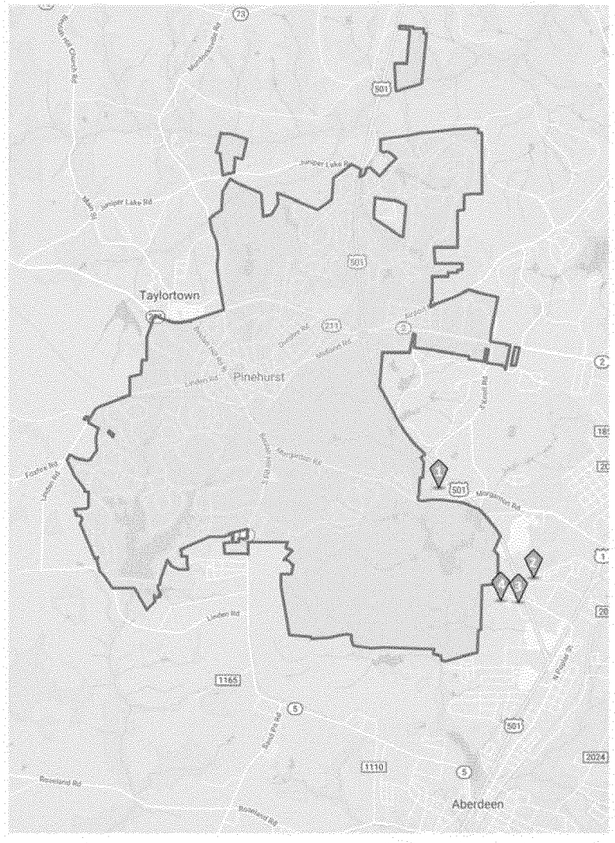
[2] North Carolina Department of Commerce, Labor & Economic Analysis. Growth rate for Pinehurst-Rockingham Area projected to be 0.6% annually from 2017-2026

[3] Based upon North Carolina Department of Commerce, Labor & Economic Analysis jobs by industry type

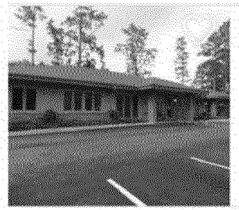
[4] Based upon industry standards

Name	Address	Year Built	Size (SF)	SF Available	Vacancy Rate	Est. Asking Rent (SF/YR)	Type	Tenant Types
Village Club Ct	7 Village Club Ct, Southern Pines, NC 28387	2019	4,000	1,675	42%	$22	Gross	Medical, Investment firms, contrator, assisted living
No Name	305 Murray Hill Rd, Southern Pines, NC 28387	2020	7,000	2,000	29%	n/a	n/a	Moore Floors
Pavilion	100 Pavilion Way, Southern Pines, NC 28387	2017	25,413	4,428	17%	$67	Gross	
Same Bldg as Chamber	160 W New York Ave, Southern Pines, NC 29387	2020	10,000	2,950	30%	$19	Gross	
Yadkin Plaza	340 Commerce Ave, Southern Pines, NC 29387	2001	25,000	7,500	30%	$12	Gross	Office, medical, retail or professional services

Source: Internet searches



1



7 Village Club Ct
Southern Pines, NC

Built in 2019
1,674 SF Office Space
$22.00 SF/YR

2



305 Murray Hill Rd
Southern Pines, NC

Built in 2020
2,000 SF Office Space
1 Space Available Now

3



170-190 Commerce Ave
Southern Pines, NC

Built in 1999
1,920 - 3,968 SF Spaces
2 Spaces Available Now

4

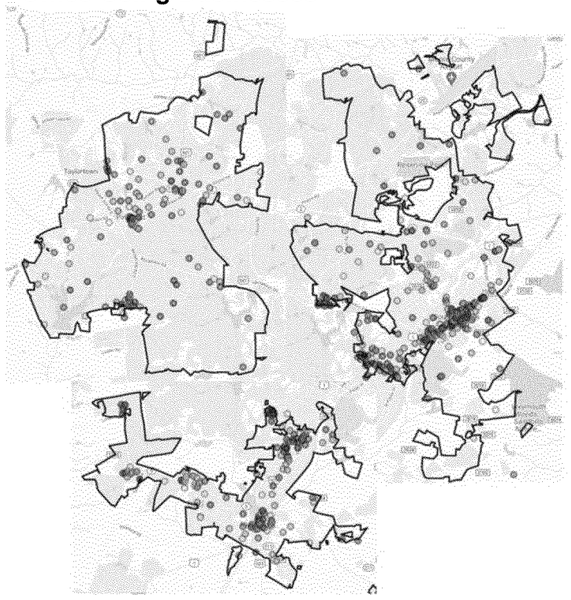


340 Commerce Ave
Yadkin Plaza
Southern Pines, NC

Built in 2001
1,500 - 7,500 SF Spaces
$12.00 SF/YR

Source: Loopnet, December 1, 2020

Office-Using Businesses



Health Care & Social Services Businesses



Source: Economic Development Partnership of NC

Additional Hospitality Data

HOTEL ROOMS
PINEHURST AREA
DECEMBER 2020

	PINEHURST AREA HOTEL ROOMS[1]	CHANGE IN HOTEL ROOMS	% CHANGE IN HOTEL ROOMS
2000	1,269		
2001	1,369	100	7.9%
2002	1,369	0	0.0%
2003	1,369	0	0.0%
2004	1,369	0	0.0%
2005	1,369	0	0.0%
2006	1,369	0	0.0%
2007	1,509	140	10.2%
2008	1,586	77	5.1%
2009	1,586	0	0.0%
2010	1,586	0	0.0%
2011	1,586	0	0.0%
2012	1,586	0	0.0%
2013	1,586	0	0.0%
2014	1,586	0	0.0%
2015	1,586	0	0.0%
2016	1,675	89	5.6%
2017	1,675	0	0.0%
2018	1,675	0	0.0%
2019	1,675	0	0.0%
2020	1,778	103	6.1%
Total	1,778	509	28.6%
Average Annual	n/a	25	1.4%

[1] Convention & Visitors Bureau, Pinehurst, Southern Pines, Aberdeen Area and Duggal Real Estate Advisors

Year	PINEHURST AREA HOTEL ROOMS ADDED[1]
1896	10
1901	334
1901	15
1913	36
1923	82
1923	42
1972	120
1980	88
1988	123
1988	77
1996	77
1996	80
1998	78
1999	107
2001	100
2007	37
2007	103
2008	77
2016	89
2020	103

[1] Convention & Visitors Bureau, Pinehurst, Southern Pines, Aberdeen Area and Duggal Real Estate Advisors

Hotel Demand Projection Based on Competitive Supply and Projected Occupancy	2016	2017	2018	2019	2020	Projected 2021	2022	2023	2024	2025	2026
Total Existing Rooms [1]	1,675	1,675	1,675	1,675	1,778	1,778	1,778	1,778	1,778	1,778	1,778
Total Room Nights [2]	670,323	670,323	669,775	669,775	644,495	644,495	644,495	644,495	644,495	644,495	644,495
Demand [3]	407,556	383,990	407,615	424,472	300,292	345,336	414,403	422,691	431,145	439,768	448,563
YOY Increase in Demand		-5.8%	6.2%	4.1%	-29.3%	15.0%	20.0%	2.0%	2.0%	2.0%	2.0%
Occupancy	60.8%	58.7%	62.5%	65.1%	46.7%	53.6%	64.3%	65.6%	66.9%	68.2%	69.6%
Baseline Occupancy for Healthy Hotel Market [4]	65%	65%	65%	65%	65%	65%	65%	65%	65%	65%	65%
Additional Supportable Hotel Room Nights	-28,154	-51,720	-27,739	-10,882	-118,630	-73,586	-4,519	3,769	12,223	20,846	29,641
Additional Rooms Supported in County			-76	-30	-325	-202	-12	10	33	57	81

[1] Total room supply within Moore County
[2] Calculation of rooms nights available per year based on total rooms
[3] Based on demonstrated room nights occupied (demand) within the county
[4] The hotel industry standard of a "healthy" market is 65% occupancy

SOURCE: Duggal Real Estate Advisors, Smith Travel Research, Moore County CVB

	2014	2015	2016	2017	2018	2019	2020
Annual Visitors (M)			1.16	1.25			
Room Supply			670,323	670,323	669,775	669,775	644,495
Room Demand			400,853	383,990	407,615	424,472	300,292
Occupancy	58.00%	60.30%	60.80%	58.70%	62.50%	65.10%	46.70%
ADR	$138.11	$133.55	$137.30	$126.53	$128.80	$139.08	$131.05
RevPAR	$79.55	$80.58	$83.24	$74.25	$80.54	$90.49	$61.26
2016 and earlier - CVB Annual Report							
2017-2020 - STR. Based upon year-to-date data from Jan-Nov. Supply and demand year-long							

Additional Golf Data

	Moore County		
	2020	2030	Change
Total Population [5]	102,950	119,674	16,724
Est. Golf Participation [1]	7.5%	7.5%	0
Total Golfers	7,721	8,976	1,254
Rounds Per Golfer Per Year	18.2	18.2	0
Total Rounds	140,527	163,355	22,828
Rounds Per Course [4]	35,000	35,000	0
Courses Supported	4.0	4.7	0.7
Annual Tourists [3]	1,140,000	1,198,300	58,300
Percent that Golf While Traveling [3]	92%	92%	0
Golfers	1,048,800	1,102,436	53,636
Avg. Rounds While Visiting [3]	1.3	1.3	0
Total Rounds	1,398,400	1,469,914	71,514
Rounds Per Course	35,000	35,000	0
Courses Supported	40	42	2
Total Courses Supported	44.0	46.7	2.7
Current Courses	43.0		

[1] Based upon National Golf Foundation data. Nationally, 7.5% of people participate in golf

[2] Based upon National Golf Foundation data. Nationally, people play 18.2 rounds per year

[3] Convention & Visitors Bureau, Pinehurst, Southern Pines, Aberdeen Area. 2030 based upon 0.5% growth per year.

[4] National Golf Foundation. The national average is approximately 30,000 rounds per year. This was adjusted up to determine the set point of the golf market in Moore County

[5] North Carolina OSBM, Standard Population Estimates, Vintage 2018 and Population Projections, Vintage 2019

Resort / Membership Type	Number of Members	Included with Land/Home Purchase	Real Estate Ownership Required	Golf	Initiation Fee	Annual Golf Dues	Tennis	Notes
Country Club of North Carolina	n/a	Available	No	2 Courses			8 courts	
Resident & Moore County					$20,000	$11,280		
North Carolina & National					$10,000	$6,309		National Annual dues are $5,175
Overseas					$3,000	$3,111		
Patriot (3-year associate) & Under 40					$1,500	$3,780		
Social					$10,000	$5,175		
Pinehurst Country Club	4000+/-	Available	No	10 Courses			16 courts	
Signature Golf (Unlimited Nos. 1-9)				1 is 9 holes	$45,000	$7,440		Properties with membership
Premier Golf (Unlimited Nos. 1-6, includes 8)					$25,000	$7,440		attached can apply for membership
Classic Golf (Unlimited Nos. 1-6)					$25,000	$6,240		at 50% off initiation fee
Sports (Discounted Rates)					$16,000	$2,664		
Social (Discounted Rates, 10 Rounds Max)					$10,000	$1,932		
Forest Creek	n/a	Available	Varies	2 Courses			2 courts	
Regular			Yes		$50,000	$11,180		Homeowners Only. Refundable & transferable
Charter II			No		$50,000	$11,180		Non-Homeowners. Non-Refundable
Junior			No		$5,000	$5,590		Under Age 40
Legacy			No		Waived until 40			Children & Grandchildren
Social			Yes		$5,000	$2,780		Homeowners Only.
Pinewild	n/a	Available	No	3 Courses	Transfer Fees		3 courts	
Full Golf				1 is 9 holes	$12,500	$5,700		New member = $25,000
Club					$7,500	$1,980		
Leisure					$5,000	$135		
Mid South Club	400 Max	Some	Varies	2 Courses	Transfer Fees		Y	Affiliate ownership with Talamore
Charter - Magnolia Full Golf			Yes		$12,500	$4,650		New Member = $35,000
Charter - Presidential Full Golf Premier			Yes		$27,500	n/a		Additional $15K Fee refundable
Signature			No		$35,000	n/a		
Holly Social			Yes		n/a	n/a		
Source: Internet searches on Nov. 24, 2020.								

Additional Golf Data

Course Name	Addresss	Holes	Rating/Slope	Par	Yardage	Avg. Green Fees	Designer	Description
Country Club of North Carolina – Cardinal Course	1600 Morganton Road, Pinehurst, NC 28374	18	75.2/140	72	7,215	Private	Wiliard Byrd	A private course featuring two distinct 9-hole courses that rank amongst the top in North Carolina.
Country Club of North Carolina – Dogwood Course	1600 Morganton Road, Pinehurst, NC 28374	18	74.9/135	72	7,301	Private	Ellis Maples	Opened in 1963, the Dogwood course has been home to many championship events through its tenure.
Forest Creek Golf Club – North	200 Meyer Farm Road, Pinehurst, 29384	18	74.7/144	72	7,209	Private	Tom Fazio	A private course featuring sprawling waste areas, ragged-edged bunkers and a pine barrens feel.
Forest Creek Golf Club – South	200 Meyer Farm Road, Pinehurst, 29384	18	73.71/139	72	7,095	Private	Tom Fazio	Patterned after Augusta National, experience 18 holes draped across the landscape of the Sandhills.
Midland Country Club	2205 Midland Road, Pinehurst, NC 28374	18	69.9/110	70	6,186	$34	Tom Jackson	A beautifully conditioned, friendly and challenging 9-hole course with multi-tee configurations for all levels.
Pinehurst No. 1	1 Carolina Vista, Pinehurst, NC 28374	18	68.4/118	70	Blue: 6,089	$115	Donald Ross	A great starting round at the Pinehurst Resort, experience a layout that has stood the test of time.
Pinehurst No. 2	1 Carolina Vista, Pinehurst, NC 28374	18	76.5/138	70	7,565	$403	Donald Ross	World renowned for unforgettable championships, Donald Ross' No. 2 remains the heart of Pinehurst golf.
Pinehurst No. 3	1 Carolina Vista, Pinehurst, NC 28374	18	63.3/118	70	White: 5,722	$115	Donald Ross	While the shortest of courses at Pinehurst Resort, don't let the modest distance fool you.
Pinehurst No. 4	1 Carolina Vista, Pinehurst, NC 28374	18	74.9/138	72	Gold: 7,226	$323	Gil Hanse	No. 4 features the most interesting topography of Pinehurst Resort with a shimmering lake as its centerpiece.
Pinehurst No. 5	1 Carolina Vista, Pinehurst, NC 28374	18	72.6/132	72	Gold: 6,848	$115	Ellis Maples	Featuring the most water hazards at the resort and variety at every hole, No. 5 is 18 holes that won't disappoint.
Pinehurst No. 6	97 Juniper Creek Blvd, Pinehurst, NC 28374	18	74.7/139	72	Gold: 7,053	$236	Tom Fazio	Renovations by Tom Fazio in 2005 have made these rolling hills a test from every tee box.
Pinehurst No. 7	14 Inverrary Road, Pinehurst, NC 28374	18	75.5/143	72	Gold: 7,216	$236	Rees Jones	Rugged terrain and landforms assist as much as they challenge when you play this Rees Jones masterpiece.
Pinehurst No. 8	100 Centennial Blvd, Pinehurst, NC 28374	18	74.1/138	72	Gold: 7,092	$236	Tom Fazio	Ross-inspired false fronts, sloping greens and more challenge and delight all skill levels on this walkable course.
Pinehurst No. 9	1 Royal Troon Drive, Pinehurst, NC 28374	18	75.5/135	72	Gold: 7,118	$236	Jack Nicklaus	Not to be outdone, Nicklaus made his mark on Pinehurst with this masterpiece amidst the pines.
The Cradle (at Pinehurst)	1 Carolina Vista Drive, Pinehurst, NC 28374	9	N/a	27	789	$50	Gil Hanse	The most fun 9 holes in golf, the Cradle features an affordable, long nine holes steps away from Pinehurst Resort.
Pinewild Country Club – Azalea Course	6 Glasgow Drive, Pinehurst, NC 28374	18	N/a	27	Blue: 1,438	Private	None	Some of the finest par-3 holes you will ever play, traversing a rolling landscape tucked into the pines.
Pinewild Country Club – Holly Course	6 Glasgow Drive, Pinehurst, NC 28374	18	73.9/141	72	Black: 7,021	Private	Gary Player	Few bunkers, more water and smaller greens, this signature design by Gary Player cannot be missed.
Pinewild Country Club – Magnolia Course	6 Glasgow Drive, Pinehurst, NC 28374	18	76.4/135	72	Black: 7,446	Private	Gene Hamm	A fantastic layout with an emphasis on risk/reward golf, open fairways with elevation lead to challenging greens.
Legacy Golf Links	12615 US Hwy 15-501 South, Aberdeen, NC 28315	18	73.2/132	72	Black: 7,018	$39	Jack Nicklaus II	While a championship course, it's a "must play" for golfers of all skill levels when visiting the Sandhills.
Foxfire Resort & Golf Club – Grey Fox Course	9 Foxfire Boulevard, Foxfire Village, NC 27281	18	73.1/131	72	6,851	$45	Gene Hamm	Hilly terrain with several doglegs cutting through the towering pines makes a playable challenge.
Foxfire Resort & Golf Club – Red Fox Course	9 Foxfire Boulevard, Foxfire Village, NC 27281	18	72.8/132	72	6,743	$45	Gene Hamm	Wide manicured fairways and large, fast rolling greens make the Red Fox Course a member favorite.
Hyland Golf Club	115 Fairway Avenue, Southern Pines, NC 28387	18	72.1/141	72	6,823	$65	Tom Jackson	Regarded as a favorite in the Village of Pinehurst, this newly restored course provides immaculate conditions.
Knollwood Fairways & Driving Range	1470 Midland Road, Southern Pines, NC 28387	9	63.8/110	35	2,517	$34	C.A. Pitts	A challenging, yet un-intimidating 9-hole course, finesse the art of shot making at Knollwood.
Longleaf Golf & Family Club	10 N. Knoll Road, Southern Pines, NC 28387	18	71.6/128	71	6,602	$62	Dan Maples	Longleaf provides an exceptional experience for every golfer, coined as 'the most playable course in the Sandhills.'
Mid Pines Inn & Golf Club	1010 Midland Road, Southern Pines, NC 28387	18	71.0/126	72	6,723	$85	Donald Ross	True to Ross' original design while manicured to modern standards, experience an impeccable championship course.
Mid South Club	610 Palmer Drive, Southern Pines, NC 28387	18	73.9/140	71	Black: 7,003	Private	Arnold Palmer	A signature Arnold Palmer course that provides a challenging, yet enjoyable championship layout.
Pine Needles Lodge & Golf Club	1005 Midland Road, Southern Pines, NC 28387	18	70.6/126	71	7,015	$85	Donald Ross	Family-owned for three generations, Pine Needles provides a completely restored Donald Ross championship course.
Southern Pines Golf Club	290 Country Club Circle, Southern Pines, NC 28387	18	69.9/127	71	6,268	$65	Donald Ross	Some of the most rewarding 18 holes in the area designed by Donald Ross with challenges from the tee box to the green.
Talamore Golf Resort	48 Talamore Drive, Southern Pines, NC 28387	18	73.2/140	71	Gold: 6,840	$69	Rees Jones	In class Scottish design, Talamore takes Rees Jones' original design to the next level for an accommodating round.
Beacon Ridge Country Club	238 Longleaf Drive, West End, NC 27376	18	71.3/136	72	6,414	$35	Gene Hamm	A classic layout providing a challenge to golfers of every ability in Pinehurst tradition.
Dormie Club	6033 Beulah Hill Church Rd, West End, NC 27376	18	72.3/130	71	6,576	Private	Coore & Crenshaw	Away from residences and roadways, Dormie provides a natural and magical 18 holes to enjoy in the Sandhills.
Seven Lakes Golf Club	124 E. Devonshire Avenue, West End, NC 27376	18	74.0/142	72	6,869	$35	Peter Tufts	A most-exciting course in classic design and paired with in-round amenities seen nowhere else in the area.
Country Club of Whispering Pines – Pines Course	2 Country Club Boulevard, Whispering Pines, NC 28327	18	74.0/133	72	7,094	$27	Ellis Maples	Subtle terrain changes and generous fairways provide a challenge on a true "inland links" course.
Country Club of Whispering Pines – River Course	2 Country Club Boulevard, Whispering Pines, NC 28327	18	70.8/129	72	6,521	$29	Ellis Maples	Elevation changes, oak-lined fairways, and smaller greens will take some "shot making" you can brag about.
Whispering Woods Golf Club	26 Sandpiper Drive, Whispering Pines, NC 28327	18	70.8/134	72	Blue: 6,324	$30	Ellis Maples	Inspired by this rolling track of land, Ellis Maples designed this signature challenge in the Sandhills for all levels of skill.

SOURCE: Convention & Visitors Bureau, Pinehurst, Southern Pines, Aberdeen Area. Rates based upon an average of posted 2020 rates or rates for the week of Nov. 24, 2020.



VILLAGE COUNCIL
MINUTES FOR REGULAR MEETING OF JULY 26, 2022
ASSEMBLY HALL
395 MAGNOLIA ROAD
PINEHURST, NORTH CAROLINA
4:30 PM

The Pinehurst Village Council held a Regular Meeting at 4:30 p.m., Tuesday, July 26, 2022 in the Assembly Hall of Pinehurst Village Hall, 395 Magnolia Road, Pinehurst, North Carolina.

The following were in attendance in Assembly Hall:
Mr. John C. Strickland, Mayor
Mr. Patrick Pizzella, Mayor Pro Tem
Ms. Lydia Boesch, Councilmember
Mr. Jeff Morgan, Councilmember
Ms. Jane Hogeman, Councilmember
Mr. Jeffrey M. Sanborn, Village Manager
Ms. Kelly Chance, Village Clerk

And approximately 42 attendees, including 6 staff and 1 press

1. **Call to Order.**
Mayor Strickland called the Village Council meeting to order.

2. **Invocation by Pastor Jabe Largen, United Methodist Church and Pledge of Allegiance led by Mayor John Strickland**

3. **Reports:**

Village Manager

- Mr. Jeff Sanborn reported the RFQ expired for submissions for our library design, and we received seven submissions. He stated Senior staff narrowed down the candidates to three to propose for council interviews and there will be more to follow on this.

Village Council

- Mayor Strickland reported the USGA is moving important assets from the Golf World Hall of Fame to Pinehurst where a few of these artifacts began their life. He stated this shows a further commitment to Pinehurst and the world of golf and building our reputation as well as theirs. Mayor Strickland reported he attended the adaptive open at course number 6 and acknowledged it was a very nice event that will return next year before being held at other locations. He stated the US Kids Golf parade will be on August 2nd. He reported he had a zoom meeting with the Department of Transportation following up on some of the discussions with respect to the traffic circle.
- Councilmember Boesch reported nothing
- Mayor Pro Tem Patrick Pizzella reported he attended the Adaptive Open as well.
- Councilmember Jane Hogeman reported the 28th of July is the next Shop til 8 in the Village Center – 4th Thursday of the Month. She stated her, Mayor Strickland, and Jeff Sanborn attended the Tri-Cities Group meeting where they spoke about

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collaborating on road paving projects and board training

- Councilmember Jeff Morgan reported the Triangle J meeting was cancelled this month.

4. Motion to Approve Consent Agenda.

All items listed below are considered routine or have been discussed at length in previous meetings and will be enacted by one motion. No separate discussion will be held unless requested by a member of the Village Council.

A. Approval of Village Council Meeting Minutes.
   - July 12, 2022, Council Regular Meeting
   - July 12, 2022, Council Work Session

End of Consent Agenda.

Upon a motion by Mayor Pro Tem Pizzella, seconded by Councilmember Hogeman, Council unanimously approved the Consent Agenda, by a vote of 5-0.

5. Motion to Recess Regular Meeting and Enter Public Hearing 1

Upon a motion by Councilmember Hogeman, seconded by Mayor Pro Tem Pizzella, Council unanimously approved to recess the regular meeting and enter Public Hearing 1 – Resorts of Pinehurst Lodge Parking Terrace, by a vote of 5-0.

6. Public Hearing No. 1 – Resorts of Pinehurst Lodge Parking Terrace

Alex Cameron, Planning Department, reported the applicant, The Resorts of Pinehurst, Inc., is seeking to amend the previously approved conditional district zoning boundary of the area associated with the Resort Lodge H-CD (Hotel – Conditional District). He noted this amendment would change an area, approximately 4.2 acres, from RD (Recreation Development District) to H-CD (Hotel – Conditional District) thus bringing a total area of approximately 6.87 acres into that zoning classification.

Mr. Cameron stated the proposed use of the newly added area would allow for the development of a two-level, partially subterranean parking structure as depicted on the General Concept Plan (GCP). A GCP is required as part of a conditional district rezoning application and if approved, the GCP then becomes a site-specific zoning plan and a condition of the rezoning. He reported the subsequent development will be reviewed through the TRC and site plan review process as required by the Pinehurst Development Ordinance (PDO).

Mr. Cameron stated further, the applicant is seeking to add a condition to the entire H-CD zoned area to preserve the uses that were approved with Resort Lodge rezoning without any intensity or increase in those uses allowed. For example, the total number of rooms for a lodging use would not be permitted to be increased from what was approved, total number of seats for a bar/tavern could not be increased. Also, a new use may not be introduced. Additionally, the requested condition would allow for the potential for impervious surface to be increased up to 15% and open space to not be reduced by more than 15%. All impervious coverage is indicated to be managed per previously approved condition #5 which mandates stormwater management will be designed to accommodate a 25-year storm event.

Mr. Cameron stated the main goal for this proposal as indicated by the applicant on the provided material, is to both provide a new parking structure to help address parking needs on the site as well as maintain the uses with the previous Lodge rezoning approval as part of the agreement between the owner (Pinehurst Resort) and the United States Golf Association (USGA) to bring additional USGA championships to the area, allow for the USGA to establish a second headquarter and provide a stimulus to the local economy. He noted the proposed conditional district map amendment would still allow accommodation of all the existing uses on the property but apply the proposed zoning classification to this specific area along the west side of Carolina Vista connecting to the boundary of the USGA's Golf House Pinehurst site zoned VMU-CD (Village Mixed Use – Conditional District)

Mr. Cameron stated the applicant initially made a submission to the Village for the request to the Technical Review Committee (TRC). He reported the application was distributed to the Technical Review Committee and subsequently went through a couple of reviews and comments by the TRC. He noted some revisions and additional material were required and made by the applicant

prior to the request being scheduled for a public hearing during the July 7, 2022 regular meeting of the Planning and Zoning Board. Mr. Cameron stated that if the rezoning request and GCP are approved by Village Council, the future site plan and construction drawings will be reviewed again by the TRC for compliance with development regulations through an administrative review process.

Mr. Cameron stated the applicant has requested a condition relative to the previously approved lodge project to permit or preserve the previously approved uses within the Lodge's approved footprint at the same or lesser intensity. He noted the reason for the request is that the Resort has not yet determined what future development would be placed within the footprint beyond the approved uses and intensities. He stated the proposed boundary amendment would allow for the addition of the parking structure and provide additional parking to the site while taking advantage of existing grade and utilizing a smaller footprint to gain the 123 additional spaces.

Mr. Cameron noted Staff is somewhat concerned with not having a better conceptualized site plan, elevations and rendering of the future uses and would recommend that the applicant provide additional conceptual plans for consideration as part of this zoning map amendment and be included as a part of the general concept plan, but Staff has no concerns with the proposed parking structure. Staff provided 5 options for Council to consider, with Mr. Cameron noting that the third option which is to approve the request without the proposed condition would allow the project to move forward.

Tom Pashley, President of Pinehurst Resort and Country Club provided Council with an update on parking and noted they have invested over 10 million dollars in parking in less than two years. Bob Koontz, Kootz Jones Design Architecture, presented Council with a presentation that included future parking alternatives, defined the reasons for the rezoning request, and shared concept plans of the future lodge that is still being designed.

Mayor John Strickland and Councilmembers inquired about the visibility of the new parking structure from Highway 5 and the surrounding area, plans to handle employee overflow parking, ADA accessibility, green space, and increased impervious surface amounts. Pinehurst resident Kevin Drum congratulated the Pinehurst Resort and Kootz Jones Design on the presentation and the proposed plan and for listening to the desires of the public. Mr. Pashley stated they would like to begin construction sometime in December.

The Pinehurst Resort and Village Council agreed to amend Condition 12 Requested Condition of the Applicant Conditions Table to read, "Previously approved uses and conditions will be maintained within the general building envelope not to exceed a total of 64,000 square feet and permitted in multiple buildings or structures. Any modification to the structure(s) will be required to obtain a Certificate of Appropriateness from the Village of Pinehurst Historic Preservation Commission. Impervious surface may not be increased by more than fifteen (15%) of the total impervious surface approved in the previous conditional district rezoning plus the site plan for the parking structure concept plan."

7. Motion to Adjourn Public Hearing and Re-Enter Regular Meeting

Upon a motion by Councilmember Morgan, seconded by Mayor Pro Tem Pizzella, Council unanimously approved to adjourn Public Hearing 1 and re-enter the regular meeting, by a vote of 5-0.

8. Discuss and Consider Ordinance #22-09

Upon a motion by Councilmember Morgan, seconded by Mayor Pro Tem Pizzella, Council approved Ordinance 22-09 for a Conditional District Zoning Map Amendment for approximately 4.2 acres of Moore County PID# 00025800, from Recreation Development District to Hotel-Conditional District, to include the portion within the area amended with Ordinance #21-07, by a vote of 5-0.

9. Motion to Recess Regular Meeting and Enter Public Hearing 2

Upon a motion by Councilmember Boesch, seconded by Mayor Pro Tem Pizzella, Council unanimously approved to recess the regular meeting and enter Public Hearing 2 – Consider a Proposed Change to the USGA Economic Development Incentive Agreement, by a vote of 5-0.

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10. Public Hearing No. 2 – Consider a Proposed Change to the USGA Economic Development Incentive Agreement

Jeff Sanborn, Village Manager and George Smith, USGA representative, presented Council with a request to amend the Incentive Agreement previously signed between the United States Golf Association and the Village of Pinehurst. The amendment requested was a simple amendment to clarify that the World Golf Hall of Fame will be a part of the incentive agreement; an administrative change.

No comment was heard from the Public.

11. Motion to adjourn Public Hearing No. 2 and Re-Enter Regular Meeting.

Upon a motion by Councilmember Boesch, seconded by Mayor Pro Tem Pizzella, Council unanimously approved to adjourn the Public Hearing No. 2 and re-enter the regular meeting, by a vote of 5-0.

12. Consider a Proposed Change to the USGA Economic Development Incentive Agreement.

Upon a motion by Councilmember Morgan, seconded by Mayor Pro Tem Pizzella, Council unanimously approved to authorize the mayor to amend the Incentive Agreement dated July 26, 2022, between the United States Golf Association, and the Village of Pinehurst as presented, by a vote of 5-0.

13. Discuss and Consider Pinehurst South Small Area Plan.

Darryn Burich and Alex Cameron presented a drone footage video of the Pinehurst South Small Area Plan. Mr. Burich stated Council is being asked to consider the Pinehurst South Small Area Plan (SAP). He noted at its May 5, 2022 meeting, the Planning and Zoning Board, received public comments, discussed, and provided a recommendation to Council on the Plan.

Mr. Burich stated that in contrast with Village Place, Pinehurst South has a significant amount of vacant land available for development at approximately 80 acres with an estimated 40 acres currently being marketed or consideration for development. He stated with the large amount of land available for development, having appropriate plans in place to establish a vision for future development and the appropriate regulatory controls to help prescribe the vision through architectural controls, build-to lines, street design etc. He stated that as Council reviews the plans, and especially the renderings and illustrations, they should keep in mind that all the illustrations and renderings are "illustrative and subject to change" as is generally noted on the corresponding pages in the Plan.

Mr. Burich stated the illustrations show potential development patterns and will guide subsequent zoning changes and potentially direct public investments and they show the long term build out of the areas over the next decades based on current market absorption, which is subject to change based market fluctuation and demand.

Mr. Burich stated that Pinehurst South is located almost directly south of the Village Center along NC 5, Pinehurst South encompasses approximately 290 acres with almost 47% of the area in a natural or undeveloped state. A portion of this planning area is unincorporated and is in the Village's Extraterritorial Zoning Jurisdiction (ETJ). He noted the planning area also includes and abuts the historically African American neighborhood of Jackson Hamlet. Mr. Burich stated the Village of Pinehurst Harness Track abuts the area on the northeast, the Lake Pinehurst neighborhood on the west, and CCNC on the east. The area contains a mix of uses ranging from single family homes, to attached housing, multiple family, older auto oriented commercial uses (generally adjacent to NC-5), newer office uses, retirement homes and an office park (Trotter Hills).

Mr. Burich stated the 41 lot Pinehurst South Cottages subdivision was recently approved and is currently under administrative review. He noted the current zoning ranges from Neighborhood Commercial (NC), Office and Professional (OP), Multiple Family (RMF) and high-density single family (R-5) and much of the current undeveloped lands are in NC, OP, and RMF zoning.

Mr. Burich stated the 2019 Comprehensive Plan recommends redevelopment with office, medical, life-science, and research facilities supported with small-scale retail services and residential uses and proposed the idea of an "Innovation Hub" on the westside of NC 5 below Blake Boulevard. He noted innovation hubs are commonly seen with medical, life-sciences, and educational institutions and generally require a large anchor such as an educational or medical institution to flourish.

Mr. Burich stated differing from the Village Place Plan, the Pinehurst South Plan does not have one "preferred build-out scenario" in favoring of showing low and high intensity scenarios with the high-density scenario including more office square footage and attached single family homes(townhouses) versus single family detached. He stated the Plans also include a mix of open space types including an approximate 6-acre central green park on the east side of NC 5. Mr. Burich stated most of the developable land on the west side of NC-5 is proposed to be in some form of residential use and to note most of those areas are currently zoned for multiple family use.

Mr. Burich stated the single family residential, and park are the most significant deviations from the 2019 Comprehensive Plan recommendations for the Innovation Hub. He noted the Comprehensive Plan did recommend housing in the form of 186 stacked residential units not single family attached or detached. Mixed-use can still occur but residential units have been proposed at the southern portion of the Innovation Hub area. He stated this was done in part to create a more compatible land use scenario adjacent to Jackson Hamlet and because the plan was already identifying approximately 250,000 - 300,000 square feet of commercial/retail in the intensity plans.

Mr. Burich stated the Plan identifies various new streets and street extensions to better connect the neighborhood with a significant Plan recommendation identifying the potential of a shared use path to create a "Rails with Trails" network within the Aberdeen Carolina and Western Railway (ACWR) right-of-way running along NC-5. He noted this would be a significant improvement to pedestrian and bicycle network and help to create a regional ped/bike connection.

Mr. Burich stated the Pinehurst South small Area Plan is before Village Council for consideration for approval. He noted staff is requesting Council take into consideration the recommendation made by the Planning and Zoning Board at the May 5, 2022 meeting to support the Comprehensive Plan's nonresidential land use recommendation.

Mayor Pro Tem Pizzella stated he liked the green ways and the trailways envision but was concerned over whether there was enough space to pull it off. He stated Village South is a neglected area for recreational space and Council should factor that in. Mayor Pro Tem Pizzella noted most importantly, Council should look at the colossal traffic problems that could come from the decisions they make.

Council requested to continue to think about the plan and the implications on traffic, and whether to see the area with more residential or business. Staff was directed to bring the item back to the next meeting. Mayor Pro Tem Pizzella noted most importantly, Council should look at the colossal traffic problems that could come from the decisions they make.

14. Other Business.

No other business was discussed.

15. Comments from Attendees.

- Phillip Sounia, spoke to Council about short-term rentals, expressing his concern about the Village's need to have the outside community come to the table on this topic before deciding.
- David Duke – 8-month resident of residence who owns a short-term rental in Pinehurst addressed Council and offered solutions such as holding Moore County accountable to the taxes they should be collecting.
- Carol Coates, 21 Edinburgh Lane, addressed Council about short-term rentals and stated that those purchasing property for usage as short-term rentals did so in direct violation of Village Ordinances.
- Nick Cino, resident of Pinehurst, 5 piedmont lane, addressed Council in support of short-term rentals, and noted they are engrained in the village's history and part of the Village character.
- Zack Whit, Clarendon Gardens, addressed Council in support of short-term rentals, noting that if you limit the number of short-term rentals, you will harm that brand of golf and hospitality the Village is known for.
- Abe Brington addressed Council in support of short-term rentals noting that Raleigh tried to get rid of short-term and made restrictions that said property had to be there and you couldn't rent out your house and made-up laws that made no sense and after a year they ended up reversing the decision. He stated this brings money to your community and some are looking for

homes to buy. They need a temporary place while they make their decision. Property values will go down as it is in Raleigh. This is a win-win situation.

- Andrew Budgey addressed Council about short-term rentals and stated his recommendation is to table a decision until you get better information, get an economic report. Grandfather them in and not eliminate them in three years because of the amount of money invested.
- Linda Guerrea addressed Council about the quality-of-life survey and stated while she has not seen any prostitution or drugs or saw anyone urinate, she is a part of this community, and her quality of life should be taken seriously.
- Jeff Heintz addressed the Council about the quality-of-life survey and stated it completely missed the mark. ….

16. Motion to Adjourn.

Upon a motion by Councilmember Boesch, seconded by Mayor Pro Tem Pizzella, Council unanimously approved to adjourn the regular meeting by a vote of 5-0 at 8:40 p.m.

Respectfully Submitted,

Kelly Chance,
Village Clerk

A videotape of this meeting is located on the Village website: www.vopnc.org
Vision: The Village of Pinehurst is a charming, vibrant community, which reflects our rich history and traditions.
Mission: Promote, enhance, and sustain the quality of life for residents, businesses, and visitors.
Values: Service, Initiative, Teamwork, and Improvement

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Welcome
Aberdeen

































VILLAGE COUNCIL
MINUTES FOR WORK SESSION OF JULY 26, 2022
ASSEMBLY HALL
395 MAGNOLIA ROAD
PINEHURST, NORTH CAROLINA

IMMEDIATELY FOLLOWING THE REGULAR MEETING

The Pinehurst Village Council held a work session at 8:50 p.m., Tuesday, July 26, 2022, in the Assembly Hall of Pinehurst Village Hall, 395 Magnolia Road, Pinehurst, North Carolina.

The following were in attendance:

Mr. John C. Strickland, Mayor
Mr. Patrick Pizzella, Mayor Pro Tem
Ms. Lydia Boesch, Councilmember
Mr. Jeffrey Morgan, Councilmember
Ms. Jane Hogeman, Councilmember
Mr. Jeffrey M. Sanborn, Village Manager
Ms. Kelly Chance, Village Clerk

And approximately 12 attendees, including 5 staff and 0 press.

1. **Call to Order.**
   Mayor John Strickland, called the Council work session to order.

2. **Neighborhood Quality of Life Survey Results Report.**
   Matthew McKirahan, Organizational Performance Director, presented Council with a report on the findings of the Neighborhood Quality of Life Survey Results.

3. **Discuss Amendments to the Pinehurst Development Ordinance (PDO) to Address Short Term Rentals and Neighborhood Quality of Life Improvements.**
   Jeff Sanborn, Village Manager, and Darryn Burich, Planning and Inspections Director, presented council with some potential revisions to the Pinehurst Development Ordinance (PDO) for discussion regarding short-term rentals as well as residential neighborhood quality of life improvements. The areas of the PDO addressed in the presentation included provisions for permit revocation, table of permitted uses, special requirements for permitted uses, and definitions.

   Council discussed amortization, number of tenants per room, homestays, and dealing with non-conformities. Council provided recommendations of areas they wanted to see short-term rentals for the Planning and Zoning Board to review. Councilmember Hogeman inquired as to whether homestays were included and defined in the changes as short-term rentals are. Councilmember Morgan stated we are not focused on homestays right now.

   Mayor Strickland stated he would propose that Council allow short-term rental properties in multifamily, vmu and vc districts. Village Manager Jeff Sanborn noted that if in some of the other districts there are existing short-term rentals with people that have property rights, you have to have a basis for taking away that property right that we haven't developed that with any of the surveying results (for other zones besides single family residences). Mayor Strickland inquired as to whether the Council consensus was for the mf, vmu, and vc districts only.

   Councilmember Morgan stated there should be more in there and more in single-family dwelling areas but he stated he has said

his peace and is not going to belabor the conversation more. He noted he believed there were three council members going against this, but he felt like he needed to have his say. Councilmember Boesch stated her understanding was that before we made decisions on the areas of allowance, we were going to get the two sides together to talk, but that did not happen, nor did we look at the economic impact on golf and she feels the Village is heading into a big court fight. Mayor Strickland stated one of the reasons he is in support of not having short-term rentals in residential districts is because small groups of individuals on the one hand or large investor groups on the other are being created at the cost of the benefit of people who want to own homes and to be more specific, the issue is they are buying up lots of homes, flipping them into rental properties, and those who want to own a home are being priced out of the market.

4. **Other Work Session Items**
   No Other work session items were discussed.

5. **Potential Future Agenda Items**
   Mayor Pro Tem Pizzella requested a follow up on the Stormwater Management Plan.

6. **Motion to Recess the Work Session and Enter a Closed Session**
   Upon a motion by Councilmember Boesch, seconded by Councilmember Hogeman, Council unanimously approved to recess the work session and enter a closed session, by a vote of 5-0.

7. **Closed Session**
   Council held a closed session pursuant to NCGS §143-318.11(a)(3) to consult with an attorney employed or retained by the public body in order to preserve the attorney-client privilege between the attorney and the public body, which privilege is hereby acknowledged.

8. **Motion to Adjourn the Closed Session and Re-Enter the Work Session**
   Upon a motion by Councilmember Boesch, seconded by Mayor Pro Tem Pizzella, Council unanimously approved to adjourn the Closed Session and re-enter the work session, by a vote of 5-0.

9. **Motion to Adjourn.**
   Upon a motion by Councilmember Boesch, seconded by Mayor Pro Tem Pizzella, Council unanimously approved to adjourn the work session, by a vote 5-0, at 11:15 p.m.

Respectfully Submitted,

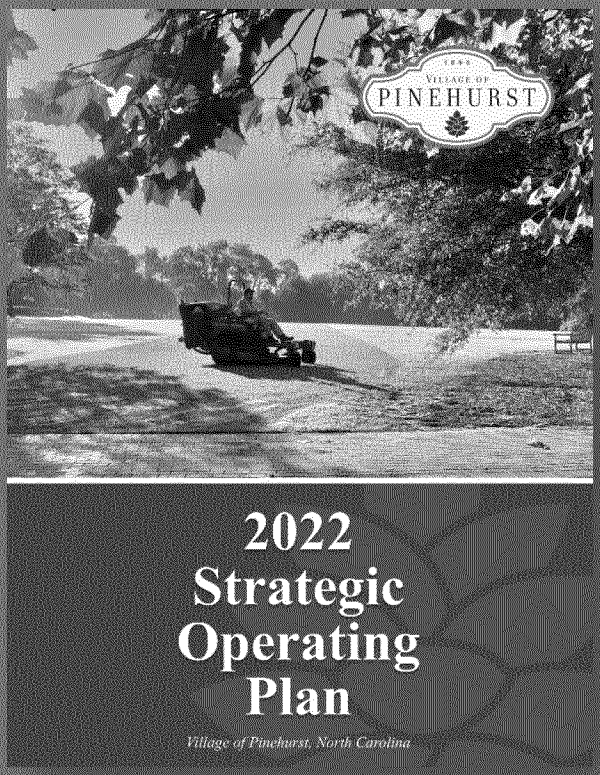
Kelly Chance,
Village Clerk

A videotape of this meeting is located on the Village website: www.vopnc.org

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Village of Pinehurst
Strategic Operating Plan Update
FY 2022



VILLAGE OF PINEHURST | www. vopnc.org

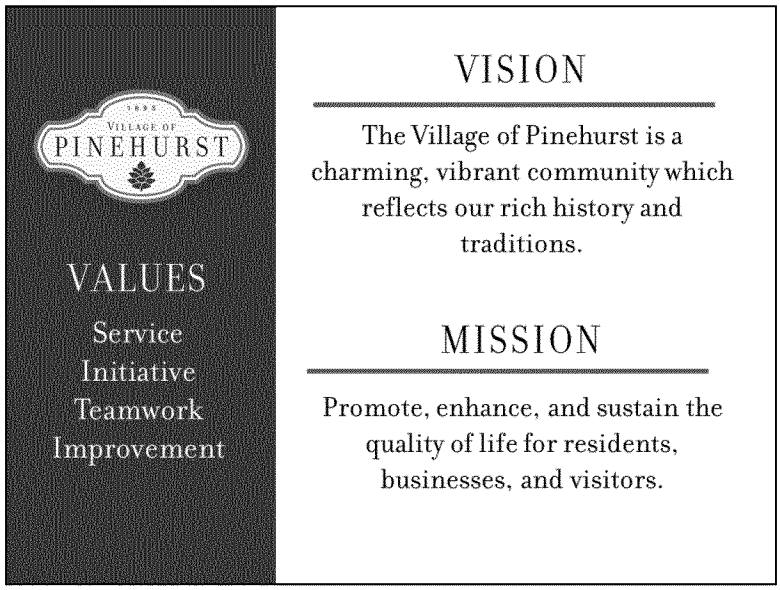
FY 2022 Strategic Operating Plan Overview

Village Council

Each year, the Pinehurst Village Council adopts a Strategic Operating Plan, which indicates the Village's plans to achieve our vision and mission. The Strategic Operating Plan covers the fiscal year that begins on July 1 and includes a five-year financial plan.

Vision, Mission, and Values

The vision is what the Village intends to be, and the mission is what the Village must do to achieve that vision. The Village's core values are the guiding principles and behaviors that embody how Village employees and volunteers are expected to operate as they provide services.



Balanced Scorecard

The Village uses a Balanced Scorecard (BSC) to integrate strategic planning and resource allocation. The BSC contains goals, objectives, and key performance indicators in four perspectives to ensure a balanced approach to evaluating the achievement of organizational strategy:

1. Customer
2. Internal
3. Workforce
4. Financial

FY 2022 Balanced Scorecard

FY 2022 Goals

The FY 2022 Balanced Scorecard contains 9 strategic goals in the four perspectives.



FY 2022 Areas of Focus

Each balanced scorecard goal has one or more strategic objectives. Strategic objectives indicate how we will achieve the Village goals. In FY 2022, the Village Council identified three strategic objectives as Areas of Focus:

1. Manage development and enforce codes and ordinances
2. Support the business community
3. Provide a safe and effective multi-modal transportation system

FY 2022 Initiative Action Plans (IAPs)

Status of FY 2022 Initiative Action Plans on June 30, 2022

The FY 2022 Strategic Operating Plan includes 5 Initiative Action Plans (IAPs).

IAP Status at 6/30/22	# of IAPs	% of IAPs
In progress; on schedule	1	20%
In progress; NOT on schedule	2	40%
Begins in the future	1	20%
Complete	1	20%
TOTAL	5	100%

Status of FY 2022 Initiative Action Plan Metrics on June 30, 2022

The IAPs include metrics to track how effective the Village is at accomplishing targeted results.

Metrics Projections Met at 6/30/22	# of IAPs	% of IAPs
Achieved projected performance	4	80%
Did not achieve targeted results	0	0%
Begins in the future	1	20%
TOTAL	5	100%

The complete status of the FY 2022 IAPs and an indication if metric projections were achieved in Q4 are indicated in the table attached to this report.

Village of Pinehurst
Initiative Action Plans (IAPs) Quarterly Report
FY 2022

	Goal	IAP Name	IAP Description	FY	Q4 FY 2022 IAP Status				
					IAP Status	Q4 Comments	IAP Metrics	YTD Actual	YTD Goal
Customer	Promote high quality development and appearance	Update the Pinehurst Development Ordinance	Update the Pinehurst Development Ordinance to reflect priorities of the 2019 Comprehensive Plan and changes required by 160d legislation.	FY21-FY25		RFQ scope of services has been developed. Waiting for other projects to clear before finalizing and issuing, which is currently anticipated in Q2 FY23.	# of PDO sections drafted and presented to Village Council	0	10
		Small Area Plan for the Village Place/Rattlesnake Trail Corridor and Pinehurst South/Hwy5 Commercial Area	Engage a consultant and develop small area plans for 2 Focus Areas identified in the 2019 Comp Plan. This represents and update and expansion of the previously adopted 2008 New Core Master Plan and a new plan for the Pinehurst South Focus Area 2.	FY22		Planning and Zoning Board received public comments and recommended approval with various modifications to the Village Place and Pinehurst South land use recommendations. On June 4th Village Council considered the Village Place Plan and approved with the P&Z Board's recommended changes.	# of participants who attended meetings or view information on Engage Pinehurst	1,337	25
	Promote a thriving business community	Expand Downtown Parking Facilities	Develop plans and construct a parking facility on Pinehurst, LLC property behind the Holly Inn.	FY22-23		The timelines for this IAP was adjusted in accordance with the FY 2023 Strategic Operating Plan. The IAP is now slated to begin in July 2024. The FY 2022 version of this IAP is now marked as a future-year IAP for reporting purposes.	# of parking spaces downtown	364	364
	Preserve the environment	Develop a comprehensive stormwater master plan	Develop a plan and strategy to address stormwater issues and concerns within the community.	FY21-FY23		Project is currently in progress, but behind schedule. We will work with McGill to present to Council during an upcoming work session. Design concepts and funding options will be met in Q1 of FY23 with the final report recommendations scheduled for the end of the calendar year.	# of MyVOP stormwater requests	84	150
	Promote active living and cultural opportunities	Expand/Enhance Library Services	Create and implement a plan to expand/enhance library services	FY22-26		Completed onboarding Library and Archives Services into the Village of Pinehurst. Staff developed an RFQ for architectual services. The RFQ was published, and planning, design and construciton of an expansion of facilties to be developed into a new IAP.	Assume operations of Given Memorial Library	Yes	Yes

IAPs listed in red are FY 2022 Village Council Areas of Focus.

Key for IAP Status	
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	In progress; on schedule
	Completed
	Starts in the future
	Removed IAP and metric
Key for Metrics	
	Did not achieve projected performance
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	Starts in the future

FY 2022-2026 Strategic Objectives

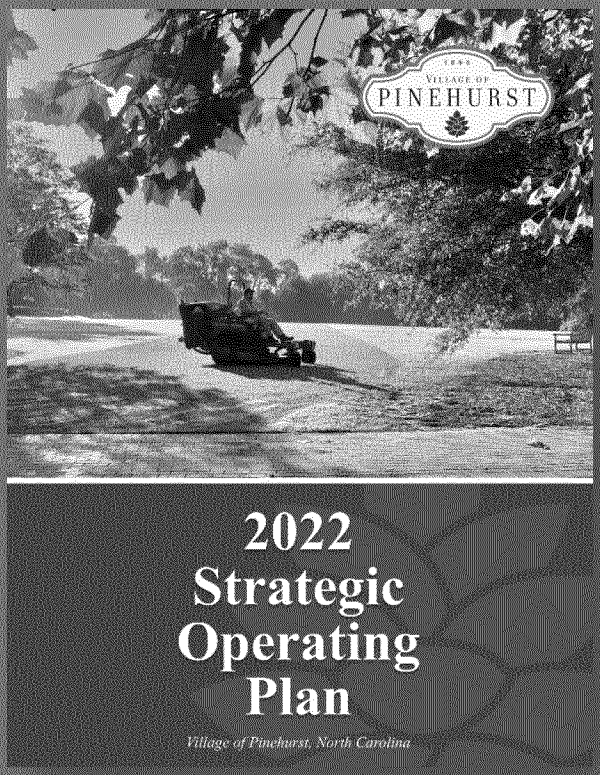
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FY 2022 OFIs that address Strat. Opportunities	OFI	Years	Notes
Update the Pinehurst Development Ordinance	IAP	FY22-25	RFQ scope of services has been developed. Waiting for other projects to clear before finalizing and issuing RFQ, which is currently anticipated in Q2 FY23. The updated timeline for this IAP would extend into FY 2024.
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Prepare a comprehensive stormwater master plan to identify effective stormwater management strategies	IAP	FY22	Project is currently in progress, but behind schedule. We will work with McGill to present to Council during an upcoming work session. Design concepts and funding options will be met in Q1 of FY23 with the final report recommendations scheduled for the end of the calendar year.
Expand/enhance library services	IAP	FY22-26	Completed the merge and developed an RFQ for architectural services. Published RFQ and planning, design and construction of an expansion of facilities to be developed into a new IAP, starting in FY23.
Identify alternative locations for the Public Services Complex	Project	FY22-24	We plan to present up to three sites to Village Council by Sept. 30, 2022.
Update the Comprehensive Parks & Recreation Master Plan while considering neighborhood open spaces and amenities	Project	FY22-23	Consultant was selected, and staff has been negotiating scope of services and cost. We plan to take to Council in Q1 of FY23.
Develop plan for community gardens	Project	FY22	Location was determined at Community Center and boxes were installed. This OFI is complete.
Add lighting to soccer field at Wicker Park and replace lighting at Cannon Park Field 2	Project	FY22-25	Project to install lights was completed during Q4.
Construct a storage building behind Fire Station 91	Project	FY22	Contract was awarded, and a PO was issued. Project completion is expected by Q2 of FY23.
Develop an ordinance for stormwater facility maintenance post-construction	Project	FY22-23	Part of the Stormwater Master Plan, which is currently in progress.

(continued) FY 2022 OFIs that address Strat. Opportunities	OFI	Years	Notes
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Village Place streetscape enhancements	Project	FY22-23	This OFI was completed.
Create a Highway Corridor Overlay ordinance in the PDO to protect critical corridors (2.21)	Project	FY22	Will get incorporated into overall PDO update, if needed. Form-based codes for Pinehurst South, and OFI related to reviewing zoning for Focus Area 5 may eliminate the need to create a separate highway corridor overlay district.
Review and update zoning for Focus Area 5 (Hwy 211)	Project	FY22	This item was removed during the FY 2023 budget discussion as it relates to other IAPs.
Consider ways to ensure safe pedestrian crossings on Page Road and Memorial Drive in the Medical District depicted in Focus Area 3. (2.7)	Project	FY22	This OFI was completed.
Create a walkable, connected community (Construct sidewalks, walkways, greenways, and/or bike lanes/paths) (I) (4.7)	Project	FY22-26	Design firm has been engaged to design projects at Pine Vista to Diamondhead and McKenzie to 211.
Implementation of stormwater improvements	Project	FY22-26	Contingent upon the Stormwater Master Plan.
Pursue public/private development partnerships, issuing Requests for Development Proposals (RFDP), as needed. (2.20)	Evaluation	FY22	Determine if we pursue after Small Area Plans are adopted
Evaluate changing stormwater standards from 10-year storm to 25-year storm and other solutions	Evaluation	FY22-23	Part of Stormwater Master Plan, which is in progress.

Future Year OFIs that address Strat. Opportunities			
Develop a consolidated multi-modal transportation plan	IAP	FY24-25	This IAP was shifted to FY24-25 in the FY 2023 Strategic Operating Plan
Pursue safety awareness grants through the SRTS program at NCDOT (4.11)	Project	FY23	
Consider enhancements to the pedestrian alleyways in Village Center	Evaluation	FY25	
Evaluate the opportunity to manage single lot residential stormwater through PDO amendments	Evaluation	FY23	Evaluate after Stormwater Master Plan is completed.
Fair Barn Utilization/Renovation	Evaluation	FY23	
Preserve/conserve open space in and around Pinehurst and develop a comprehensive conservation plan for ETJ (includes: 2.1, 4.5, 7.9, 7.15, 7.16	Project	FY24	Remains a future year OFI. Review of possible inclusion in FY24.
Address resident street lighting dissatisfaction	Project	FY24-26	
Consider expanding the Village's extra-territorial jurisdiction north of NC Highway 211 and west of US Highway 15-501	Project	FY24	
Evaluate CommunityViz Model to evaluate impact of development (includes 2.10, 2.11, 2.12, 7.14)	Evaluation	FY25	Evaluate in FY25 to determine if we use it in F26
Evaluate the needs for an additional Police Station or substation to meet the increased service needs and demands of residents	Evaluation	FY26	
Develop West Pinehurst Park and identify potential partners	Project	5+ years	
Consider a policy to partner with others to promote private, or public, acquisition of historic properties to hold, manage, preserve, restore, and improve properties to promote historic preservation efforts. (1.4)	Evaluation	5+ years	A program and policy for HPC. This OFI was moved to 5+ years.
Assess whether the community supports an indoor and/or outdoor performing arts venue, and if so, explore options for locations and funding sources	Evaluation	FY27	
Coordinate efforts between Aberdeen, Southern Pines, and Pinehurst to expand arts and cultural facilities and experiences in the region	Project	FY27	
Consider public/private partnerships to locate artist studios and galleries in the Village Center and Village Place to enhance the character of the Village and expand the arts	Project	5+ years	

Village of Pinehurst
Strategic Operating Plan Update
FY 2022



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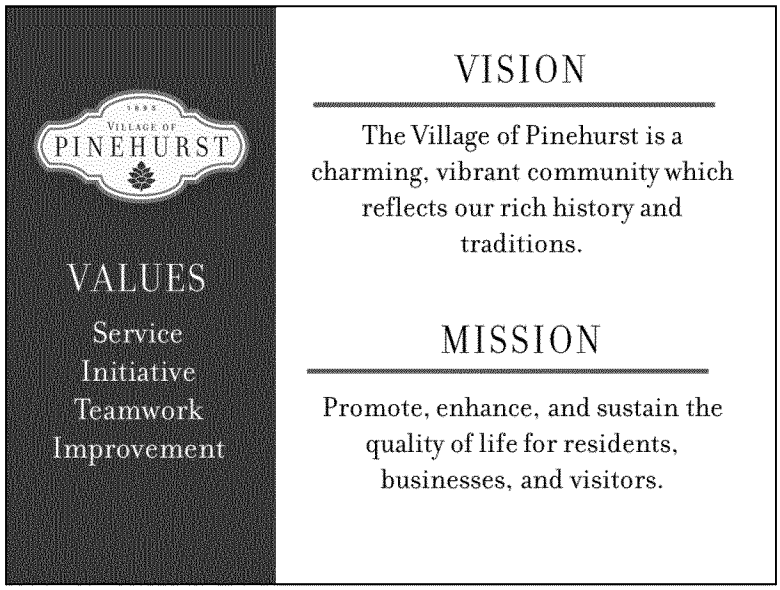
FY 2022 Strategic Operating Plan Overview

Village Council

Each year, the Pinehurst Village Council adopts a Strategic Operating Plan, which indicates the Village's plans to achieve our vision and mission. The Strategic Operating Plan covers the fiscal year that begins on July 1 and includes a five-year financial plan.

Vision, Mission, and Values

The vision is what the Village intends to be, and the mission is what the Village must do to achieve that vision. The Village's core values are the guiding principles and behaviors that embody how Village employees and volunteers are expected to operate as they provide services.



Balanced Scorecard

The Village uses a Balanced Scorecard (BSC) to integrate strategic planning and resource allocation. The BSC contains goals, objectives, and key performance indicators in four perspectives to ensure a balanced approach to evaluating the achievement of organizational strategy:

1. Customer
2. Internal
3. Workforce
4. Financial

FY 2022 Balanced Scorecard

FY 2022 Goals

The FY 2022 Balanced Scorecard contains 9 strategic goals in the four perspectives.



FY 2022 Areas of Focus

Each balanced scorecard goal has one or more strategic objectives. Strategic objectives indicate how we will achieve the Village goals. In FY 2022, the Village Council identified three strategic objectives as Areas of Focus:

1. Manage development and enforce codes and ordinances
2. Support the business community
3. Provide a safe and effective multi-modal transportation system

FY 2022 Initiative Action Plans (IAPs)

Status of FY 2022 Initiative Action Plans on June 30, 2022

The FY 2022 Strategic Operating Plan includes 5 Initiative Action Plans (IAPs).

IAP Status at 6/30/22	# of IAPs	% of IAPs
In progress; on schedule	1	20%
In progress; NOT on schedule	2	40%
Begins in the future	1	20%
Complete	1	20%
TOTAL	5	100%

Status of FY 2022 Initiative Action Plan Metrics on June 30, 2022

The IAPs include metrics to track how effective the Village is at accomplishing targeted results.

Metrics Projections Met at 6/30/22	# of IAPs	% of IAPs
Achieved projected performance	4	80%
Did not achieve targeted results	0	0%
Begins in the future	1	20%
TOTAL	5	100%

The complete status of the FY 2022 IAPs and an indication if metric projections were achieved in Q4 are indicated in the table attached to this report.

Village of Pinehurst
Initiative Action Plans (IAPs) Quarterly Report
FY 2022

	Goal	IAP Name	IAP Description	FY	Q4 FY 2022 IAP Status				
					IAP Status	Q4 Comments	IAP Metrics	YTD Actual	YTD Goal
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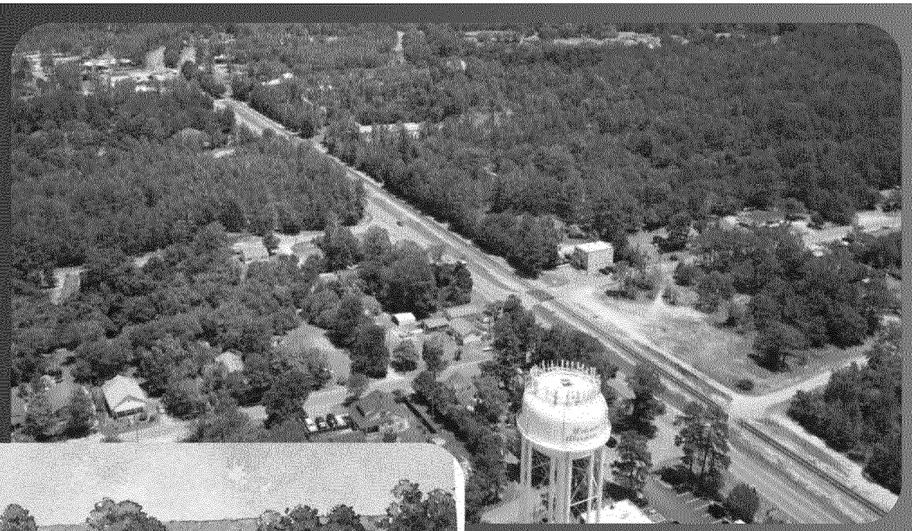
FY 2022-2026 Strategic Objectives

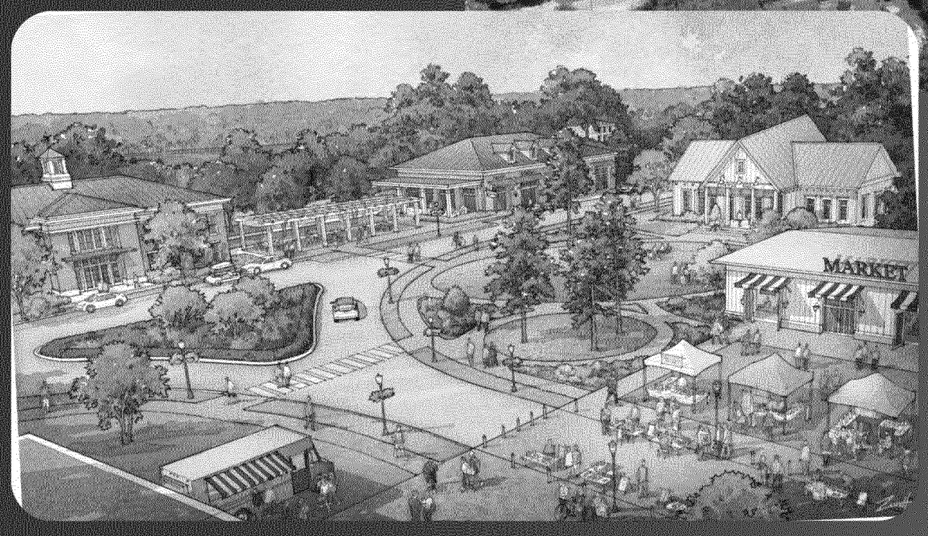
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VILLAGE OF PINEHURST SMALL AREA PLAN

PINEHURST SOUTH

COUNCIL ADOPTION: [illegible]

PLANNING AND ZONING BOARD ACTION: 5/5/22

Design Collective

DUGGAL REAL ESTATE ADVISORS

Moving forward. RKA RAMEY KEMP ASSOCIATES

1895 VILLAGE OF PINEHURST

ACKNOWLEDGMENTS

ELECTED & APPOINTED OFFICIALS

JOHN C. STRICKLAND
Mayor

PATRICK PIZZELLA
Mayor Pro Tempore

LYDIA BOESCH
Treasurer

JEFF MORGAN
Council Member

JANE HOGEMAN
Council Member

JUDY DAVIS
Former Council Member

KEVIN DRUM
Former Council Member

VILLAGE STAFF

JEFF SANBORN
Village Manager

DARRYN BURICH
Planning & Inspections Director

ALEX CAMERON
Planning Supervisor

DESIGN TEAM

DESIGN COLLECTIVE

Baltimore, Maryland

Urban Design/ Planning
Matt D'Amico, PLA
Principal-in-Charge, Facilitator
Cecily Bedwell, AICP, LEED-AP BD+C, NCARB
Project Manager, Lead Planner, Facilitator
MacKenzie Twardus, PLA
Planner, Landscape Architect, Facilitator
Mayte Ortgea-Webbert
Planner, Facilitator
Brian Reetz, PLA, ASLA
Facilitator
Anna Owen Dennis, PLA, ASLA, LEED Green Assoc.
Facilitator
Jennifer Heinz-Zahner
Landscape Architect
Michael Pullano, Associate ASLA
Landscape Designer, Facilitator

RAMEY KEMP ASSOCIATES

Raleigh, NC

Transportation
Adam Fischer, PE
Transportation Planner, Facilitator
Jessica McClure, PE
Traffic Engineering Lead, Facilitator

DUGGAL REAL ESTATE ADVISORS

McLean, Virginia

Market & Economic
Melina Duggal, AICP
Market Analyst, Facilitator

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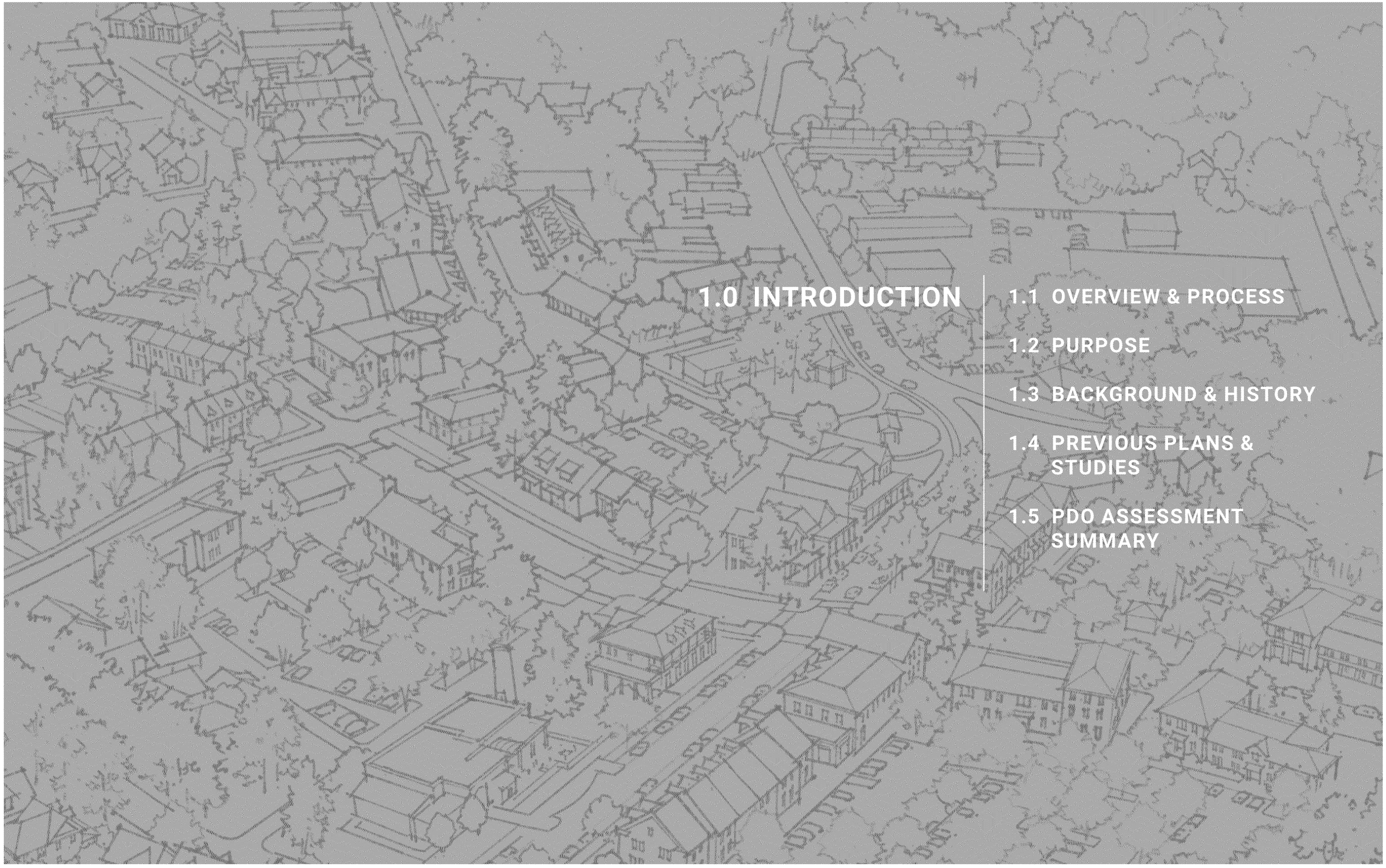
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1.0 INTRODUCTION

1.1 OVERVIEW & PROCESS

1.2 PURPOSE

1.3 BACKGROUND & HISTORY

1.4 PREVIOUS PLANS & STUDIES

1.5 PDO ASSESSMENT SUMMARY

1.1 OVERVIEW & PROCESS

Overview

The Village of Pinehurst identified Pinehurst South, as areas well-suited to accommodate growth, advance economic development goals, increase revenues and the tax base, and to support the many quality-of-life needs of existing residents, businesses, and visitors.

In an effort to advance these opportunities and create a set of Small Area Plans that respond to the Village's 2019 Comprehensive Plan and guide future development initiatives, the Village of Pinehurst hired Design Collective, Duggal Real Estate Advisors, and Ramey Kemp & Associates. These plans will guide decision making on new development and redevelopment, public and private investments, policy and zoning, and many other important topics that will have a long-term impact on the Village.

The focus of this document is on the Pinehurst South Small Area Plan. For recommendations pertaining to Village Place, please see the *Village Place Small Area Plan*.

The scope for the Pinehurst South Small Area Plan (SAP) project included planning, streetscape, and landscape design; market/economic analysis; and transportation planning. The consultant team, led by Design Collective, worked on behalf of the Village and prepared plan recommendations, zoning regulations, and development standards specific to Pinehurst South that, once adopted by the Village, will guide future private development as well as public capital improvement projects.

Process

The Small Area Plans effort occurred in the three following phases, with stakeholder involvement in all phases. Work began in November 2020 with adoption projected in late 2021. For additional information on stakeholder input and public feedback, refer to Section 3.0 of this document.

PHASE 1: DATA COLLECTION; EXISTING CONDITIONS INVENTORY AND ANALYSIS

The first step in the process was to fully assess and understand existing conditions; historic, cultural, and environmental assets; neighborhood goals and objectives; realistic market-driven development opportunities; resident and stakeholder concerns and input; constraints and opportunities; and other factors that would inform the Small Area Plan.

Throughout December 2020 and January 2021, the consultant team conducted over 20 key stakeholder interviews, discussing the two plan areas with Village staff, appointed and/or elected officials, agency representatives, committee chairs, residents, local businesses and merchants, golf and tourist industry representatives, major employers, property owners, developers, brokers, and others to further understand their viewpoints. Phase 1 concluded with Public Workshop 1 in February 2021 with approximately 100 attendees.

PHASE 2: PLANNING AND DESIGN

In Phase 2, from March to June 2021, based on the analysis conducted and feedback received during Phase 1, the consultant team designed and compiled Concept Plan Options, Street Sections, Open Space and Street Network Plan Diagrams, Renderings, Precedent Images, and similar for Pinehurst South. During this time frame, the consultant team discussed the two plan areas and concepts with Village staff, appointed and/or elected officials, and key stakeholders and, based on input received, refined the concepts. These concepts were shared in early June 2021 in Public Workshop 2 to solicit further feedback; approximately 59 attendees participated.

PHASE 3: MASTER PLAN REPORT

During Phase Three, the design team presented the final draft plan to the community at a public input event in February 2022. This event provided an opportunity for the public to review and comment on the final draft prior to adoption. The design team then prepared this final master plan report, an illustrated, guiding document that outlines the preferred plan options and supported recommendations for the Pinehurst South Small Area Plan.

Project Goals

The following project goals were identified in the project RFP, issued by the Village:

- Create a small area plan to facilitate redevelopment as an "Innovation Hub" with office, medical, life science, and research facilities with small-scale retail services and residential uses;
- Create an implementable plan to make the community's vision for the area a reality in keeping with previous planning efforts and the newly adopted Comprehensive Plan;
- Economic feasibility, urban design, and improving the public realm (e.g., roadways, sidewalks, parks, plazas, open spaces) are key aspects of this plan that must include specific and achievable actions;
- Extend the vision of Tufts, Olmsted, and Manning from the Village Center to NC-5 and throughout the Pinehurst South study area;
- The Plan should recognize (but not require) the foundational principles set forth in the National Historic District Nomination (Nomination) submitted to the National Park Service in 1994. The area should feature:
  - Abundant landscaping, walking paths and open spaces while
  - Minimizing traffic and maintaining the human scale of buildings.
- Guiding Principles 1, 2, 5 and 7 of the 2019 Comprehensive Plan are especially important to the development of the Small Area Plans;
- Explore traffic relief measures pertaining to NC-5;
- Buffering and mitigating the impact of new development will be an important part of this planning effort;
- Care must be taken to consider the interaction of any proposed new use with existing uses in the area, and to consider the impact of any proposed new use on the surrounding neighborhoods; and
- Provide sufficient and discrete parking for any proposed use will be an important consideration.

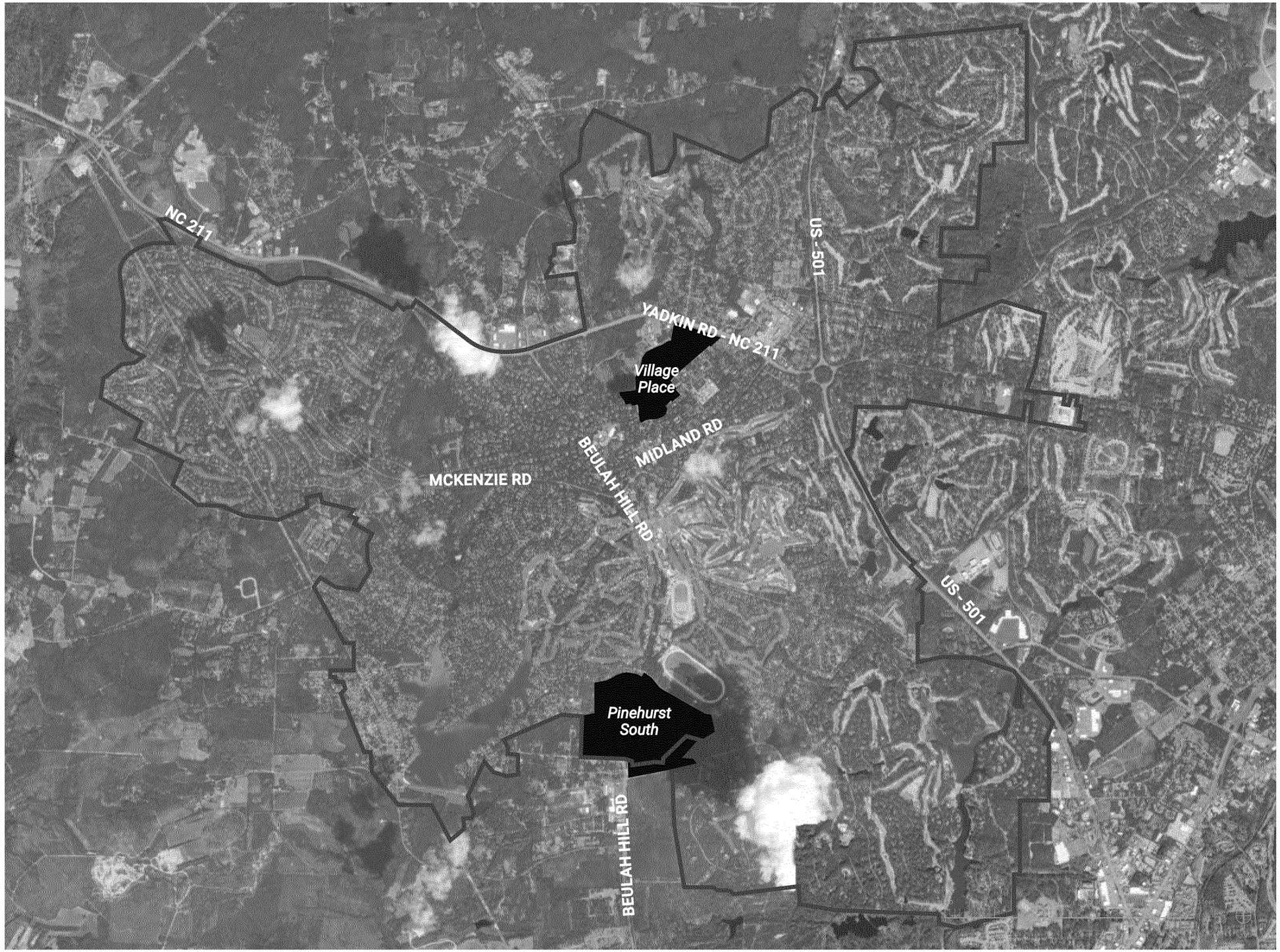
Planning Goals

The following planning goals were identified through the development of the *Pinehurst South Small Area Plan*, based on analysis and stakeholder feedback:

- Provide a connected street network that will help disperse and alleviate traffic congestion on NC-5
- Explore placemaking and creating a center east of NC-5, between Monticello and Blake Boulevard, building off the nexus of the Post Office, Pharmacy, ABC, Dowd Cabin, and the new Girls & Boys Club;
- Incorporate a variety of new Open Spaces, to serve surrounding office and residential users and a Shared-Use Path (SUP) adjacent to the Railroad to connect Pinehurst South to the Village Center;
- Explore an alternative approach from the Innovation Center suggested in the 2019 Comprehensive Plan which is likely better suited to Focus Area 3, anchored by an institution;
- Explore variety of residential types (including cottages, townhouses, live-work, and missing middle res.) and infill commercial; and
- Explore the realignment of Monticello Drive to accommodate the relocation of the Village's Public Service Facility from Village Place to the property south of the Harness Track.

Locator Map

The Village of Pinehurst boundary encompasses approximately 17.3 square miles of land area. The two focus areas, Village Place and Pinehurst South, are located to the north and south of the Village Center, the historic hub of the community. Connecting these two focus areas is a range of housing, lodging accommodations, retail, and recreational amenities, including golf courses, lakes, and walking and bike trails.



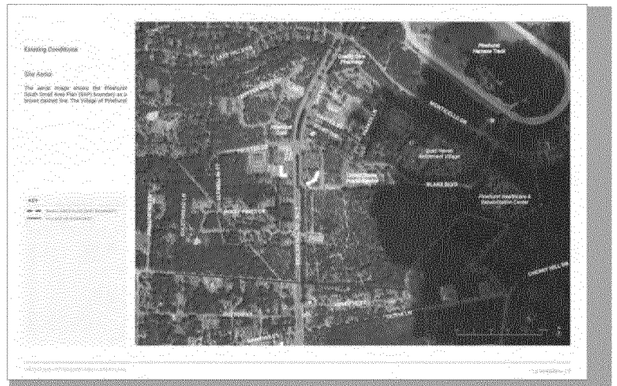
KEY

- VILLAGE OF PINEHURST
- SMALL AREA PLAN BOUNDARIES

1.2 PURPOSE

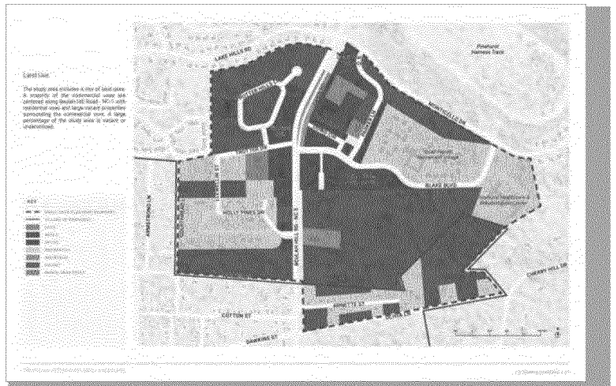
The purpose of this plan is to define the characteristics of future development that are supportable and appropriate for Pinehurst, to guide change towards a predictable and agreed upon outcome. This plan addresses land use; street types; open space; pedestrian and bicycle facilities and connectivity; and numerous other considerations. Recommendations will consider impacts and benefits, traffic, revenues and costs, phasing, zoning, development standards, Pinehurst Development Ordinance (PDO) updates, and other implementation strategies.

The document includes the following components:



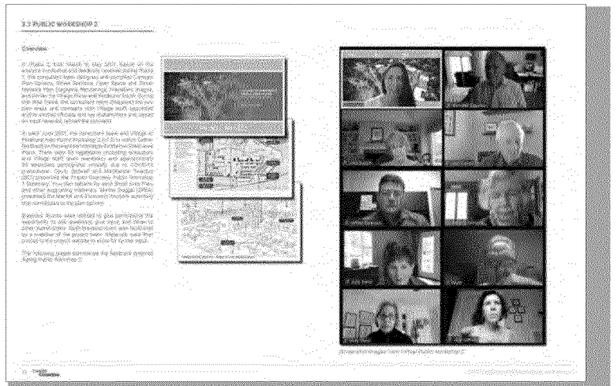
SECTION 1.0: INTRODUCTION

Provides a brief overview of the project location, the objectives and process, and a general description of the document's content.



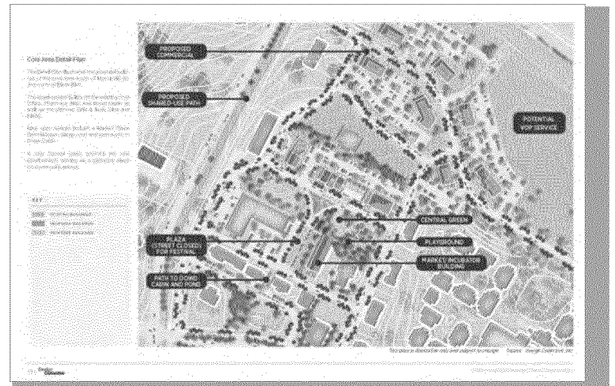
SECTION 2.0: EXISTING CONDITIONS

Examines the physical and market conditions of Pinehurst South through photo documentation, analysis of data, stakeholder interviews, and community feedback.



SECTION 3.0: PUBLIC OUTREACH

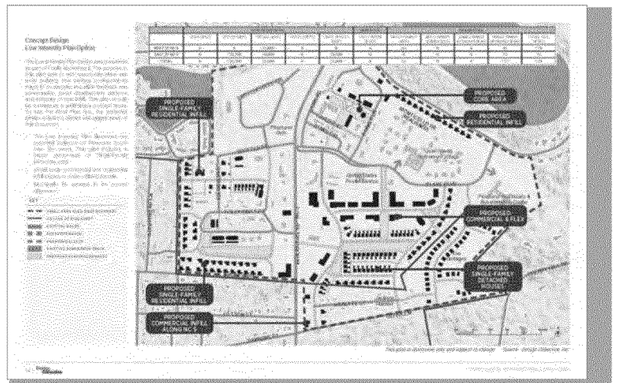
Provides a brief overview of the stakeholder interviews and public workshops that were implemented as part of the public outreach process.



SECTION 4.0: RECOMMENDATIONS

Provides a brief overview of the approach, concept planning, and feedback that the consultant team used as guidance towards the final recommendations.

Highlights development opportunities; describes street systems; and provides illustrative and photographic examples of open spaces and streetscape design elements.



SECTION 5.0: IMPLEMENTATION

Summarizes fiscal analysis data as it relates to the implementation of the proposed concept design and approach for Pinehurst South.

This document does not cover development standards required for construction review within the Pinehurst South Small Area Plan, including Site Design, Street Design, Landscape Design, Architectural Design, and Sign Design criteria. For more information on the on the criteria and the submission and review process, please refer to the Pinehurst Development Ordinance.

Site Aerial

The aerial image shows the Pinehurst South Small Area Plan (SAP) boundary as a brown dashed line. The Village of Pinehurst

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST



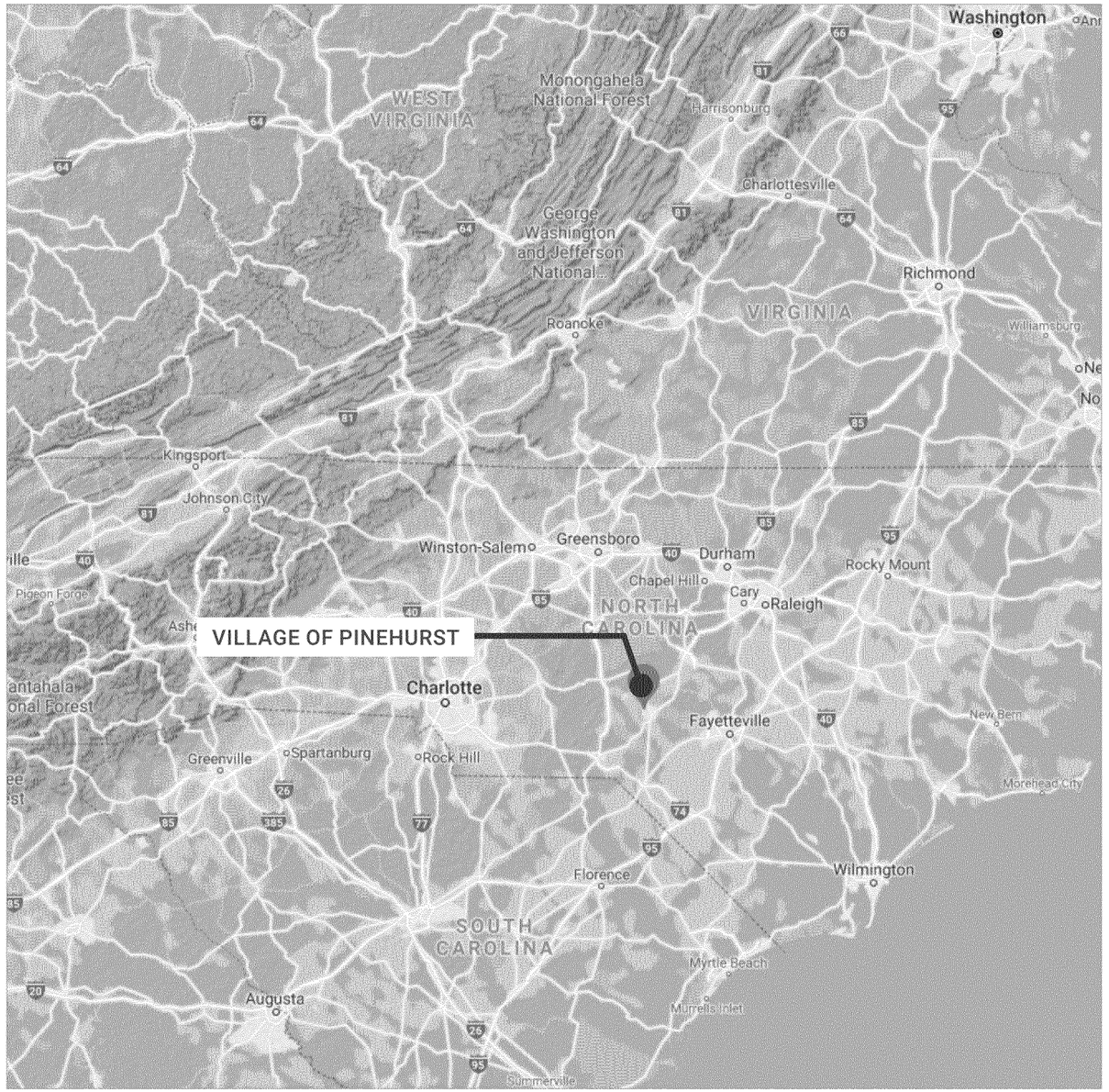
Background and History

The Village of Pinehurst is a small, traditional town located in North Carolina, approximately 70 miles from Raleigh and 100 miles from Charlotte. Located equidistant to these two major cities, the Village is accessed by Yadkin Road - NC 211 and US 15 as the two major thoroughfares that bisect its boundary.

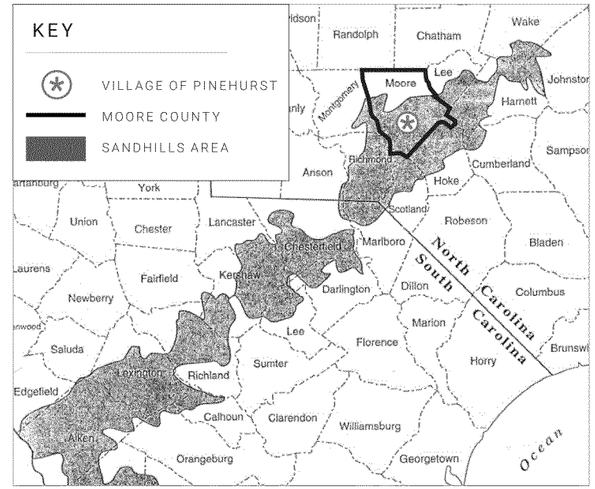
One of two National Historic Landmark Districts in North Carolina, the Village is deeply rooted in its setting and history. The area is nestled in “the Sandhills” of Moore County, characterized by rolling hills, covered by deep coarse sands and forested areas. Longleaf pines, in particular, were a major resource for the region and harvested to produce turpentine for the naval industry and lumber. By the late 1800s, the growth of the Raleigh and Augusta Railroad became a catalyst for industry and development.

By 1895, James Walter Tufts purchased the original lands of the Village, approximately 5,980 acres, to create a health resort and wellness community centered around pulmonary issues. He hired one of the country’s most prestigious landscape architecture firm at the time, Olmsted, Olmsted, and Eliot to plan and design the Village.

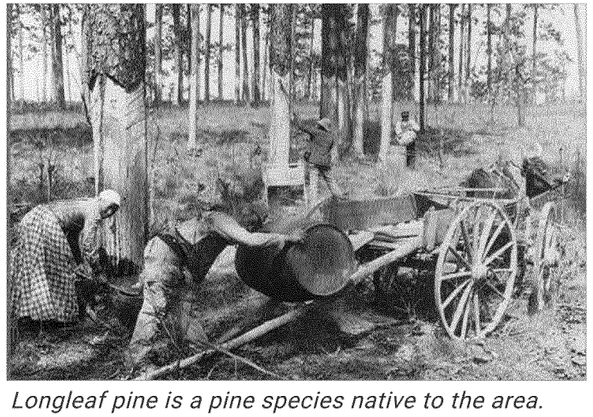
The Village of Pinehurst was first opened in January 1896 with the Holly Inn and several guest cottages as the initial phases of development. Since then, the Village has grown to become an iconic golf destination and anchor site of the U.S. Open, supported by the Pinehurst Resort, a variety of hotels, boutique shops and restaurants, and a wide range of trails, natural amenities, and historic sites for visitors to enjoy.



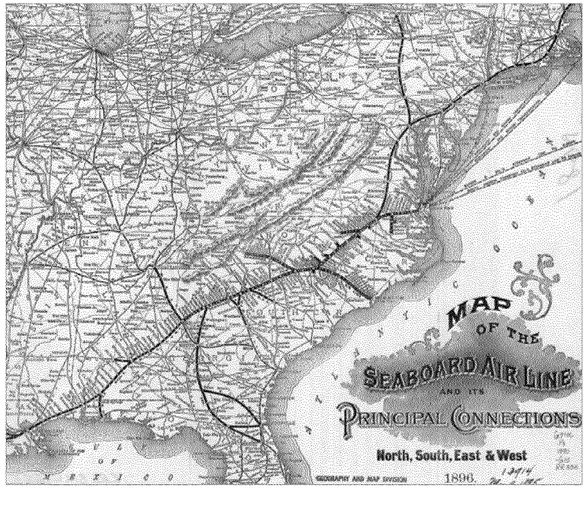
Regional map

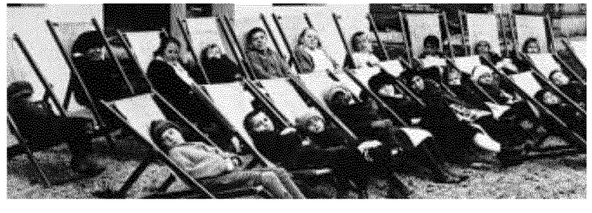


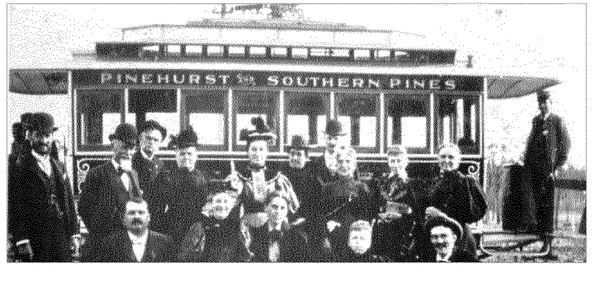
Map of the Sandhills Area

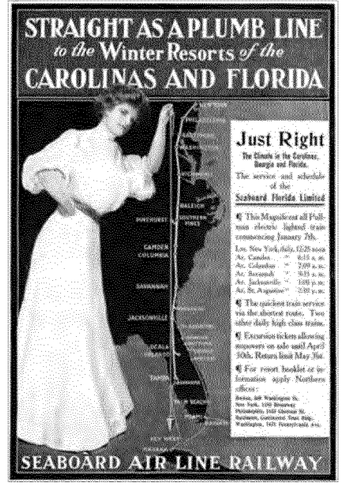


Longleaf pine is a pine species native to the area. Pine resin was extracted and collected into barrels for distilling into turpentine used to make oil paint for ships and buildings.

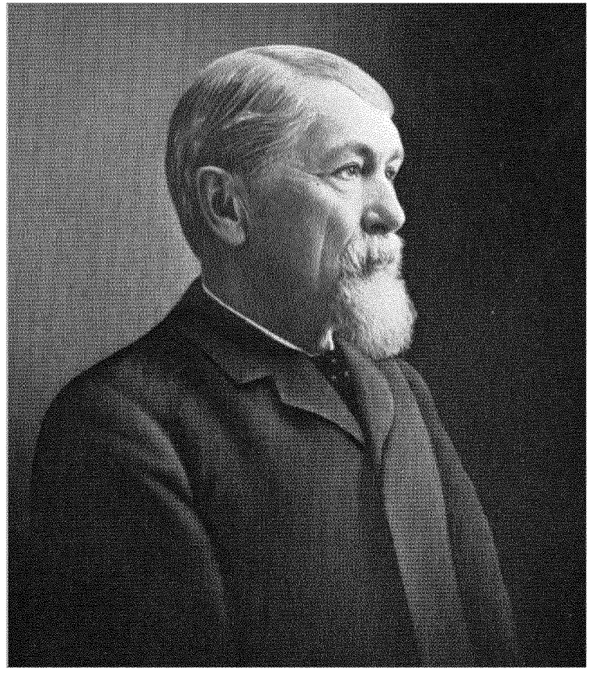




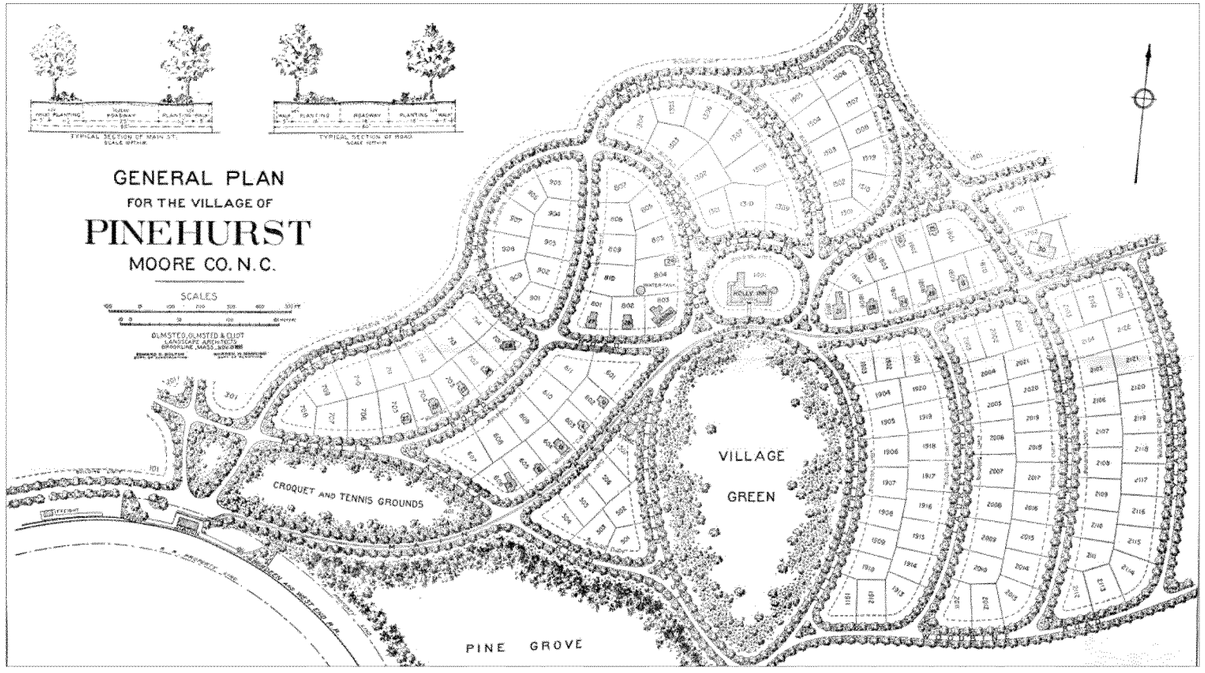




In the 1800s, pollution in cities and the expansion of rail lines to the south provided the catalyst for people to retreat to warmer and healthier environments, contributing to the growth and development of parts of North Carolina.



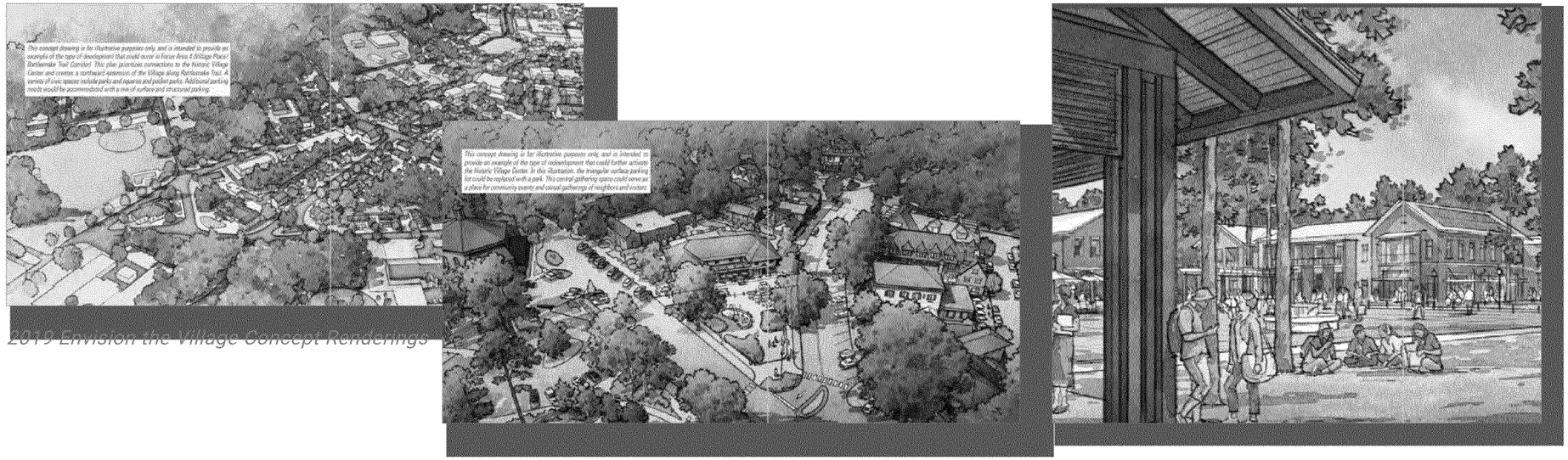
James Walter Tufts



General Plan for the Village of Pinehurst - 1895

1.4 PREVIOUS PLANS AND STUDIES

Since becoming a municipality in the 1980s, at least eight plans have been completed, either encompassing the full area of the Village, or focusing on a particular neighborhood. A summary of each relevant study can be found below.



2019 Envision the Village Concept Renderings

2020 STRATEGIC OPERATING PLAN

As the most recent previous planning effort untaken by the Village, this plan identified growth in population and increased development as the primary issues facing the Village. The plan established the following priorities and areas of focus:

1. Safeguard the community;
2. Promote high quality development and appearance;
3. Promote a thriving business community;
4. Promote transportation mobility and connectivity;
5. Protect the environment;
6. Promote active living and cultural opportunities;
7. Professionally manage a high performing organization;
8. Attract and retain an engaged workforce; and
9. Maintain a healthy financial condition.

2019 COMPREHENSIVE PLAN

The Village completed the *2019 Comprehensive Plan* as a guide to manage growth for the next 15-20 years. The planning effort included a significant level of public participation including numerous public forums and online engagement. The Plan outlined the following seven guiding principles:

1. Retain the small-town charm, scale, and character of the community to ensure a high quality of life. Celebrate and preserve the historic Village and traditions that make Pinehurst desirable and unique.
2. Balance the need to conserve land while allowing purposeful, quality development in strategic locations to meet the needs of residents, businesses, and visitors. Ensure high quality development that reflects the character of the community and maintain high quality gateways and corridors to ensure the built environment is in keeping with the character of Pinehurst.
3. Protect and enhance the quality and character of existing residential neighborhoods. Seek opportunities to offer a variety of housing types that appeal to a wide range of households and enable residents to live in Pinehurst throughout all stages of life. Ensure neighborhoods are connected to walkable destinations such as parks, open spaces, recreational facilities, and other activity centers.
4. Provide a safe, reliable and efficient transportation system that promotes and enhances mobility and connectivity between neighborhoods and destinations through a multi-modal network of complete and walkable streets, sidewalks and paths for vehicles, golf carts, pedestrians, and cyclists.
5. Support the golf, tourism and healthcare industries that make up the economic backbone of the community by encouraging entrepreneurship, supporting diverse and innovative businesses, and developing a thriving arts, culture, and entertainment market. Encourage a variety of shopping, dining, and cultural opportunities for residents and visitors alike.
6. Ensure supporting infrastructure and community facilities exist to meet the needs of existing and future Pinehurst residents, businesses, and visitors. Partner with other providers to plan for and expand infrastructure as necessary to ensure a high quality of life.
7. Preserve, conserve, and feature Pinehurst's natural resources with expanded parks, open spaces, and events that enhance the health and well-being of the community and the environment.

2015 COMPREHENSIVE BIKE PLAN

The *2015 Comprehensive Pedestrian Plan* was completed to evaluate the needs of current and future residents and visitors in the Village. The efforts included input from a Steering Committee, several Community Workshops/ Events and a Pedestrian/Bicycle Survey. The following Goals and Objectives were established:

- Increase the options for bicycling as an alternate form of transportation within the Village
- Provide attractive, yet safe, bicycling connections from Village residential areas to nearby destinations
- Promote bicycling as a healthy exercise
- Create a bicycle environment that is friendly to all users - including seniors, disabled persons and children
- Improve connections between disparate parts of the Village
- Promote bicycle safety

2015 COMPREHENSIVE PEDESTRIAN PLAN

The *2015 Comprehensive Pedestrian Plan* was completed at the same time as the *2015 Comprehensive Bike Plan* to evaluate the needs of current and future residents and visitors in the Village. The efforts included input from a Steering Committee, several Community Workshops/ Events and a Pedestrian/Bicycle Survey. The following Goals and Objectives were established:

- Increase "walkability" in the Village of Pinehurst
- Create a pedestrian network that is an important part

of the urban structure

» Promote walking as healthy exercise

» Create a pedestrian environment that is friendly to all users – including seniors, disabled persons and children.

» Improve connections between disparate parts of the Village.

2011 VILLAGE OF PINEHURST THOROUGHFARE PLAN

The *2011 Village of Pinehurst Thoroughfare Plan* was completed as an update to the original Thoroughfare Plan completed 20 years prior by the North Carolina Department of Transportation. The intent was to ensure a dynamic and strategic road network for the Village of Pinehurst for future travel and development needs. As stated in the report, the intent was to create a local consensus of the vision for Pinehurst's future transportation system. The plan included a designation of roadways as Major Thoroughfares, Minor Thoroughfares, and Collector Streets, as well as a Thoroughfare Map identifying each road classification. The plan recommended the following principles for the Village's local road improvements:

» Advocate for context sensitive design in all transportation planning and design efforts

» Continue to prefer roundabouts over signalized intersection and other traffic control devices when considering intersection improvements.

» Assure appropriate landscaping as a high priority on road projects in our jurisdiction

» Preserve the tree canopy on local and regional projects to maintain our community character

» Preserve and enhance landscaping at gateway intersections

» Maintain and enhance landscape along road corridors

» Maintain strong design controls in the transportation planning review process

» Continue to investigate methods to minimize the overall costs of future pavement maintenance

» Continue to monitor traffic speeds

» Continue efforts to minimize the number of curb cuts and other possible disruptions to traffic flow, capacity, and safety on major roads.

» Continue to plan for additional sidewalks and trails to be integrated with local streets and NCDOT projects

2010 COMPREHENSIVE LONG RANGE PLAN

The *2010 Comprehensive Long Range Plan* was a two part document including a Strategic Element and an Implementation Element. The Strategic Element guided the overall strategic direction of the Village to preserve and enhance the overall sense of place. The Implementation Element included a detailed compilation of tasks and programs to be completed. The plan outlined four thematic elements: Enhance, Preserve, Guide and Support. With the plan, the Village intended to:

» Preserve and enhance the unique character and ambience of the entire community, especially the historic Village Center

» Enhance the quality of life for present and future residents

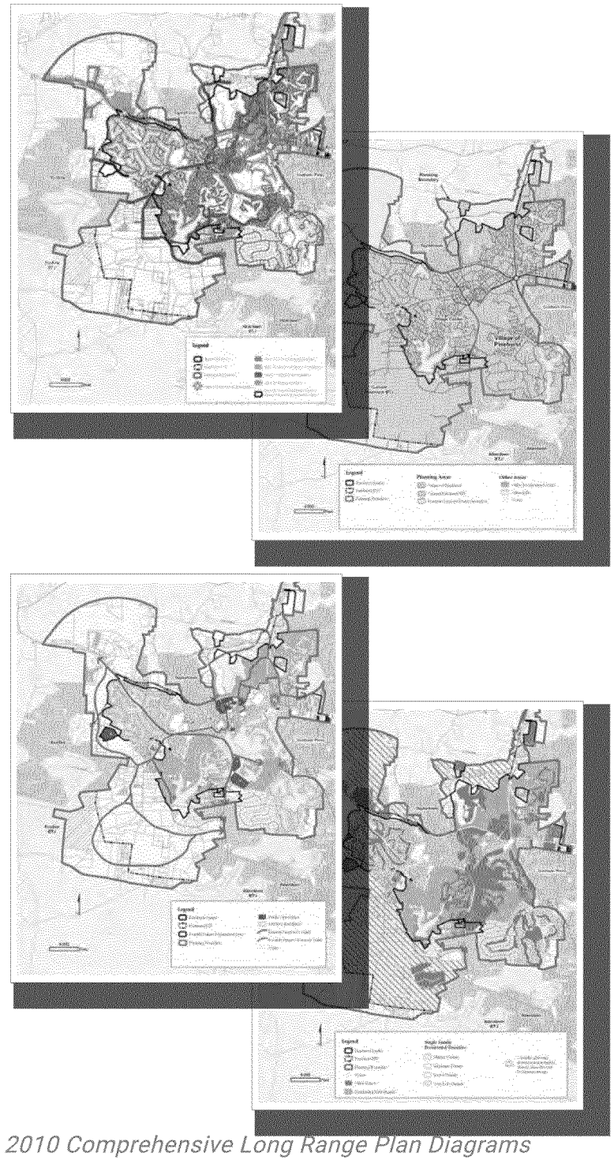
» Guide growth or change in ways that complement the unique character and ambience of the community

» Address community needs in the most efficient and cost-effective manner

» Maintain the legacy of Pinehurst for future residents and visitors to enjoy.

2008 NEW CORE MASTER PLAN

The *2008 New Core Master Plan* focused on an area of approximately 19 acres in the Village Center as an opportunity for redevelopment. The study included participation of a Steering Committee as well as extensive public participation, including a three-day charrette. The Key Concepts and Principles for the Plan included:



2010 Comprehensive Long Range Plan Diagrams

» Continuation of the scale, design, architectural character and "walkability" of the Village Center

» A mix of uses – retail, office, residential and open spaces

» Addition of roads and sidewalks to provide access to the interior of the plan area and to continue the Village's interconnecting street pattern

» Clustering retail uses on the southern portion of the plan area, where they would be in close proximity to the Village Center and enhance its strength as a specialty retail location

» Adding a variety of residential uses – cluster homes including single-family residential, townhouses, live-work units, and other market-supported residential forms

» Adaptive reuse and/or relocation of historic structures

» Pedestrian emphasis

» Providing at least as much parking as needed for development in the New Core

1994 NATIONAL HISTORIC LANDMARK NOMINATION

The *1994 National Historic Landmark Nomination* highlights the history and making of Pinehurst by Frederick Law Olmsted, Warren H. Manning, and James Tufts. The document highlights the intentions of the Olmsted plan to ensure the "overlay of an evergreen landscape on a curvilinear pattern of Village streets" as the heart of the design for the recreational resort and details many aspects of the original plan and development.

A companion to the 1994 National Historic Landmark Nomination was the creation of the Village of Pinehurst Historic District Standards and Guidelines, created in 2006 and updated through September of 2013.

1.5 PDO ASSESSMENT SUMMARY

The development ordinance for the Village, known as the *Pinehurst Development Ordinance (PDO),* includes regulations for all development (whether new, or modifications to existing, development) and became effective October 2014.

As part of the analysis of the Small Area Plan (SAP) Existing Conditions, the consultant team completed a comprehensive review of the PDO, looking for items of concern, compiled in this summary, that may inhibit achieving the envisioned future of Village Place and Pinehurst South.

The PDO regulations were adopted in accordance with the then current, *2010 Comprehensive Long Range Village Plan,* as well as all other then current Village plans and policies, in order to accomplish the following goals:

- Preserve and enhance the unique character and ambience of the entire community, especially the historic Village Center;
- Enhance the quality of life for present and future residents;
- Guide growth or change in ways that complement the unique character and ambience of the community
- Address community needs in the most efficient and cost-effective manner; and
- Maintain the legacy of Pinehurst for future residents and visitors to enjoy.

While these goals remain valid, since the adoption of the PDO, several additional planning efforts have been undertaken, including the *2019 Comprehensive Plan*. Along with many other key strategies and recommendations, the new comprehensive plan called for a full update to the PDO, specifically to include corridor standards, conservation subdivision standards, and character-based zoning concepts. The Small Area Plan (SAP) effort, and the following summary, builds off of this *2019 Comprehensive Plan* key recommendation.

For the SAP, the consultant team focused on the following sections of the PDO.

SECTION 8.2 GENERAL USE ZONING DISTRICTS

The General Use Zoning Districts section of the PDO provides land use regulations for nineteen (19) districts allowing for a variety of uses appropriate to the character of each individual district. The following items were noted as concerns for this section, relative to the SAP effort:

- Section 8.2.5 defines R-10, R-8 and R-5 as High-Density Residential Zones, however, high-density uses (such as Multi-family and Townhouse Dwellings) are not permitted by the Section 8.5 Table of Permitted Uses. Only Single-Family Dwellings are permitted and are not considered a high-density type.
- In addition to the specific item listed above, generally, the Euclidian or used-based zoning districts are counter to the recommendation in the *2019 Comprehensive Plan* for character-based zoning. The Form-Based Codes (FBC), to be developed as part of this SAP effort, in contrast, align with the comprehensive plan's recommendation and will shift the focus from use-based zoning to building form and character. The FBC are intended to supplant the current PDO for Village Pace and Pinehurst South areas only.

SECTION 8.5 & 8.6 TABLE OF PERMITTED USES & SPECIAL USES

Section 8.5 of the PDO contains a list of uses which may be permitted in one or more of the various General Use Zoning Districts established by the Ordinance. While Section 8.6 defines the Special Requirements as called for in Section 8.5. The following items were noted as concerns for these sections, relative to the SAP effort:

- There are several terms used in the Table of Permitted Uses & Special Uses which are inconsistent or in conflict with Section 10.2 Definitions. These terms may be limiting or unintentionally promote certain uses in areas that are not intended by the PDO. In particular, the following items were noted:
  - The terms "Industry, Heavy" and "Heavy" while used in Section 10.2, are not included in the Section 8.5. It is unclear where uses in this category would be classified in Section 8.5.
  - In regard to Senior Housing, Section 8.5 lists the categories "Residential Care Facilities (More than 6 Residents)" and "Child/Adult Daycare Center". These terms do not address the additional uses listed in Section 10.2 as defined under "Nursing Home: Adult Care Home , Assisted Living Residence, Continuing Care Retirement Community, and Hospice". Therefore, it is unclear whether these additional uses were intentionally omitted and, if so, why.
  - Section 8.5 does not include "Office", as defined in Section 10.2 as "general business office, government offices, insurance offices, law office and real estate and management offices". The specificity of the uses listed in the table may be problematic for certain types of office that may be desirable.
  - The term "Dwelling - Mixed Use" is used in Section 8.5, however, it is unclear whether the term "Live-Work Unit" (as defined in Section 10.2) is included as a Dwelling-Mixed Use. This may potentially limit the ability for development of Live-Work units.
- SR-3 Dwelling, Multi-Family:
  - The minimum size for a multi-family dwelling is one thousand five hundred (1,500) heated square feet. This size is well outside the typical unit size and may preclude new development from occurring and/or providing a range of unit sizes to meet market demand.

SECTIONS 9.1 & 9.2 TABLE OF DIMENSIONAL REQUIREMENTS

Section 9.1 of the PDO defines the minimum design and development standards for all buildings, sites, and infrastructure. While Section 9.2 defines the dimensional requirements for all uses and structures in the General Use Zoning Districts.

The following items were noted as concerns for these sections, relative to the SAP effort:

- Minimum Front Yard Setback: The minimum front yard setback for the majority of districts is greater than or equal to 20'. This may be problematic for smaller infill lots and/or to allow for a street frontage that relates to a pedestrian scale where building frontage is desirable and helps to create an engaging streetscape.
- The Minimum Rear Yard Setback in most districts is a minimum of 20' or more. This may preclude the redevelopment of small infill lots or lots that do not require on-lot parking and/or are rear-loaded.
- As written, the principal building as well as other structures including decks, landings, terraces, porches, and patios (with minimal exclusions) shall not be located within setbacks (*see 9.1.E.2*). This standard may unintentionally eliminate desirable building elements (such as deep front porches and bay windows).
- Building Height: While "Dwelling - Multifamily" is a permitted use in the VCP and VR districts, the building height is limited to 35', thereby limiting these buildings to 2 stories with a sloped roof (unless placed in an off-hill site condition or designed with a flat roof). As noted under Section 10.2 below, Building Height is measured to the highest point of the roofline, which precludes a 3-story building with a properly sloped roof and may unintentionally force a flat roof or a truncated sloped roof with a well.

SECTION 9.14 DESIGN STANDARDS FOR SINGLE FAMILY DWELLINGS & 9.3 VILLAGE DISTRICT DESIGN STANDARDS

Section 9.14 of the PDO defines design standards for Single-Family Dwelling development to ensure it is compatible with existing development and consistent with its site and surroundings. While Section 9.3 defines

design standards for the Village Districts to promote development that is functionally and structurally compatible with the existing Village Center and pedestrian area.

The following items were noted as concerns for these sections, relative to the SAP effort:

- While the landscape design standards in Section 9.14 go into some detail and specify minimum quantities, the Exterior Building Materials portion is very limited (perhaps due to the restrictions placed on one- and two-family dwelling design standards by the state). The majority of this section is focused on process rather than design standards.
- The Village District Design Standards are applicable only to the following districts: Village Mixed Use, Village Cottage Professional, and Village Residential. Therefore, the following residential districts, R-5, R-8, R-10, R-15, R-20, R-30, R-210, and R-MF, as well as Office Professional (OP) district do not have design standards, limiting the design oversight of these areas.
- Certain standards are vague or impractical; e.g., shake is limited to 15% per block, requiring the architect or builder to calculate every facade on the block in lieu of their proposed building only and allowing the first buildings to consume a full block's allotment of shake; facade lighting standards address glare, but do not address light trespass, full cut-off fixtures to protect the night sky, light temperature, or energy-conserving lamps; public spaces shall be incorporated in the Village Mixed-Use District, but no other districts and there is mention of minimum size, frequency, appropriate types, amenities, and similar.

SECTION 10.2 DEFINITIONS

Section 10.2 of the PDO contains definitions of words used within the ordinance. The following items of concern were noted for this section:

- Building Height is defined as "the vertical distance measured from the average elevation of the proposed finished grade at the front of the building to the highest point of the roof". The preferred method requires building height to be measured to the eave or to the midpoint of the roof, allowing properly pitched roof slopes and tall floor-to-ceiling heights reflective of the Village's architectural character.
- Live-Work Units are defined as "variations of either the detached house building type or the townhome building type". It is recommended to also include Dwelling - Mixed Use to coordinate with the Table of Permitted Uses & Special Uses in Section 8.6.
- The use of the phrase "detached house" should match "Dwelling, Single Family".
- "General Retail" is a term used in Section 8.5, however is not defined in Section 10.2.

To see current zoning districts and permitted uses that exist within the Small Area Plan boundaries, see pages 22-23 of this document.

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2.0 EXISTING CONDITIONS

2.1 OVERVIEW

2.2 EXISTING CONDITIONS

2.3 MARKET ANALYSIS SUMMARY

Existing Conditions

Located south of the Village Center along NC-5, Pinehurst South encompasses approximately 290 acres with almost 47% of the area undeveloped. A portion of this area is in the unincorporated area of the Village of Pinehurst known as the Village's Extraterritorial Zoning Jurisdiction (ETJ). Some of the development in this study area is older, more auto-centric, and may be considered out of character with the Village.

The *2019 Comprehensive Plan* recommends redevelopment with office, medical, life science, and research facilities supported with small-scale retail services and residential uses. Given the availability of undeveloped land, Pinehurst South offers the unique opportunity to expand the character of Pinehurst and create a new gateway for the Village to the south.

To ensure the small area plans support the Village's vision, the design team conducted a thorough assessment and inventory of existing conditions to understand the historic, cultural, environmental, social, market, and economic assets of Pinehurst.

The plan builds on the strengths of the existing conditions; upholds the planning principles of the original Tufts, Olmsted, and Manning vision and plan; and extends the Village's small-town scale, architectural character, and walkability outward rather than allowing auto-oriented commercial development to creep inward over time.

This section includes the photographs, diagrams, and conclusions of this documentation and analysis phase, which was then used, along with stakeholder input, as the groundwork for the concept planning phase (Phase 2).

The Existing Conditions and Analysis diagrams include:

- Existing Illustrative Plan
- Figure Ground Plan Diagram
- Historic District Plan Diagram
- Street Network Plan Diagram
- Posted Speed and Traffic Control Plan Diagram
- Land Use Plan Diagram
- Zoning Plan Diagram
- Topography Plan Diagram
- Open Space + Trails + Sidewalk Plan Diagram
- Market Analysis Summary

The following observations were made as part of the Existing Conditions study:

- Forest cover is abundant in Pinehurst South; however, the area lacks meaningful and organized open spaces for the community's use.
- There is a grouping of existing and planned commercial and civic uses in the area between Monticello Drive and Blake Boulevard, including the Post Office, Pinehurst Fire Station No. 2, American Legion, the soon-to-be-relocated Boys & Girls Club, and a new headquarters building for NAHB.
- Multi-family and Single-Family Detached (SFD) residential are the primary uses west of NC-5. This area is poorly connected for pedestrian, bicycle, golf cart, and vehicle circulation as well as to other surrounding streets and trails.
- Trotters Hill Office Park is an enclave of separate professional office buildings. Several lots have been developed, including several in recent years, particularly those adjacent to and with visibility from NC-5. With the recent construction, few undeveloped parcels within the office park remian.
- There is a range of residential architecture in Pinehurst South, some of which is in keeping with the historic character of Pinehurst and some that appears quite out of place or in disrepair.
- Similarly, there is a range of commercial architecture in Pinehurst South, some of which is in keeping with the historic character of Pinehurst and some that appears quite out of place as ubiquitous, auto-centric development.
- Overall, the area remains largely undeveloped and, thus, presents an opportunity for development that responds to the market demand but additionally upholds the Village's character.



Monticello Drive
Source: Design Collective



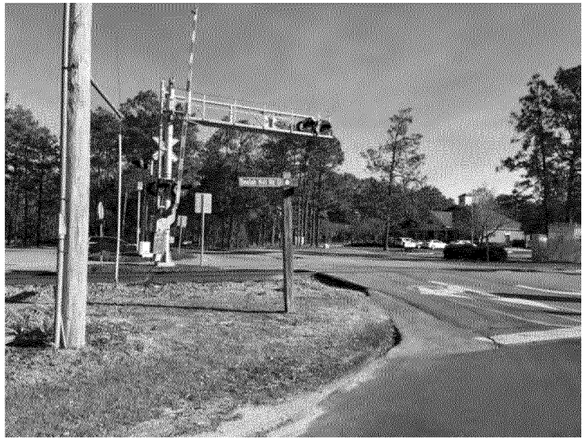
Blake Blvd & NC-5
Source: Design Collective



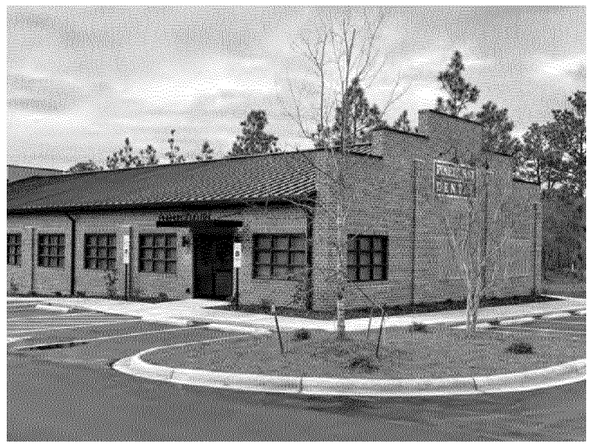
Multi-Family Residential - Abingdon Square
Source: Design Collective



United States Post Office - Blake Blvd
Credit: Google



Blake Blvd Railroad Crossing
Source: Design Collective



Commercial - Pinehurst Dental/Trotters Hill Office Park
Credit: Google



Commercial - Trotters Hill Office Park
Source: Design Collective



Commercial - Pinehurst Coins
Credit: Google Images



Flooring Gallery
Credit: Google

Illustrative Site Plan

The Existing Illustrative Plan depicts the development and open space patterns that exist in the study area. A 1/4-mile walking radius (5-minute walk) is indicated on the plan for reference.

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS
- PARKS/ OPEN SPACE

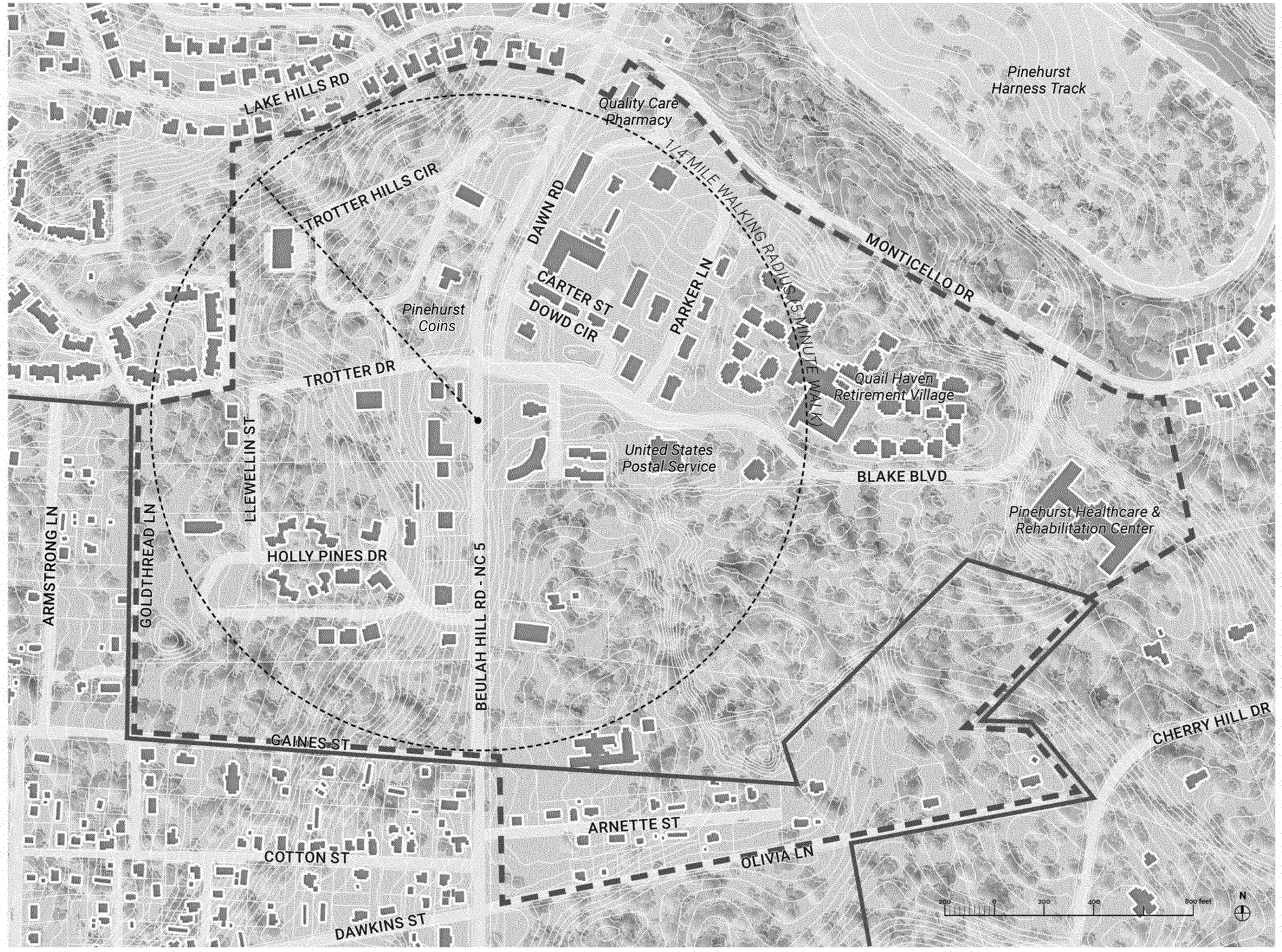
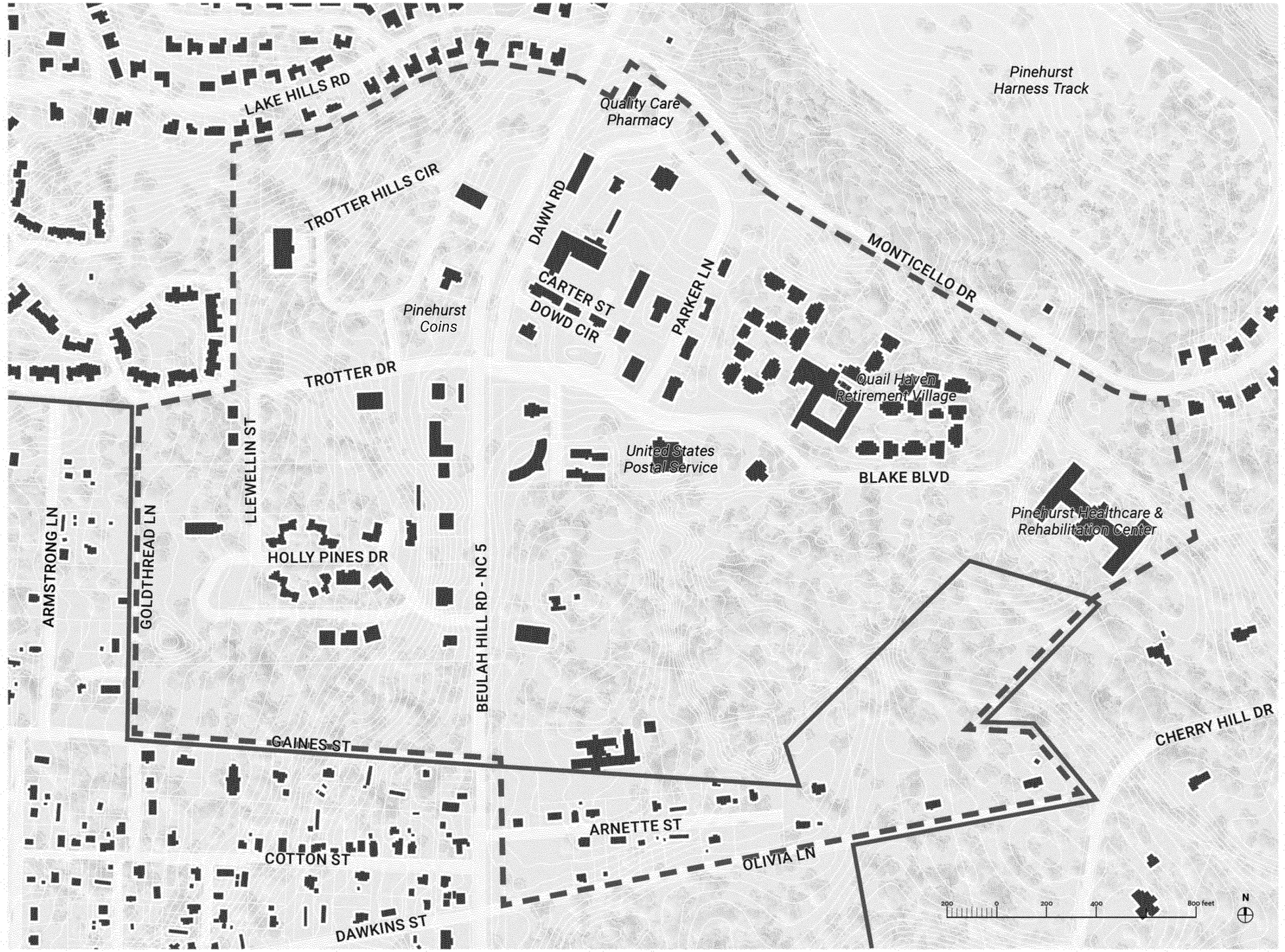


Figure Ground

The Existing Figure Ground plan shows the relationship of built and unbuilt space in Pinehurst South.The development patterns in the study area are characterized by commercial uses accessed off of Beulah Hill Road - NC-5 with a mix of residential building types interspersed to the west and east. Undeveloped parcels exist in Trotter Hills, a planned office development located in the northwest corner of the study area. The development consists of 17 parcels with approximately 1/3 of the lots either developed, permitted, or under review. Larger underutilized land with no projected development exists in the southeast corner of the study area.

KEY

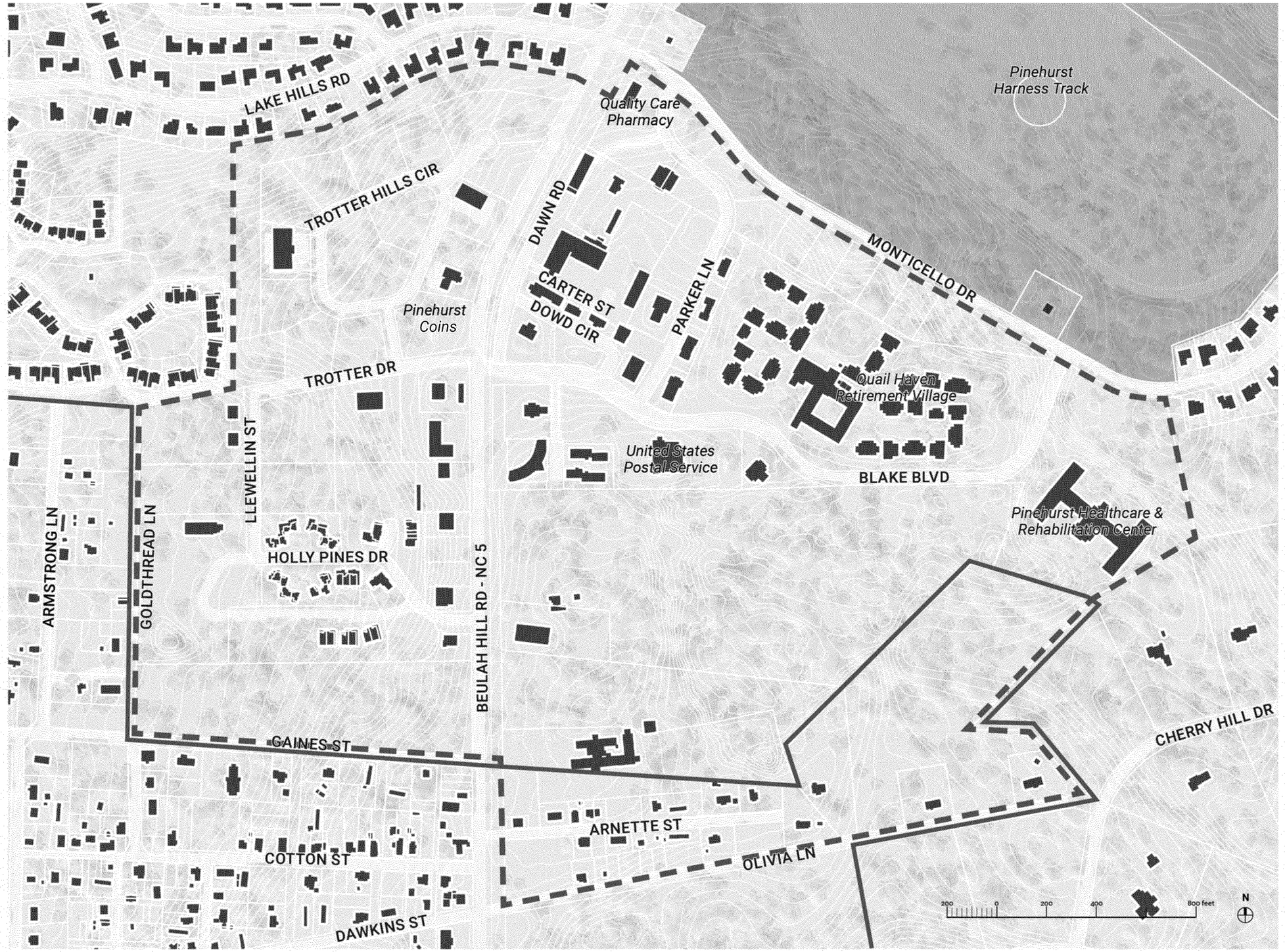
- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS



Historic District

The Historic District is comprised of properties that fall within the National Historic Landmark district or that were surveyed and identified as important fixtures within the community. These properties are subject to additional review by the Historic Preservation Commission and the Historic District Standards to ensure the history and charm of the Village of Pinehurst is preserved.

No portion of the Historic District expands into the Pinehurst South study area, however, the Pinehurst Harness Track lies directly to the north and is within the District.



KEY

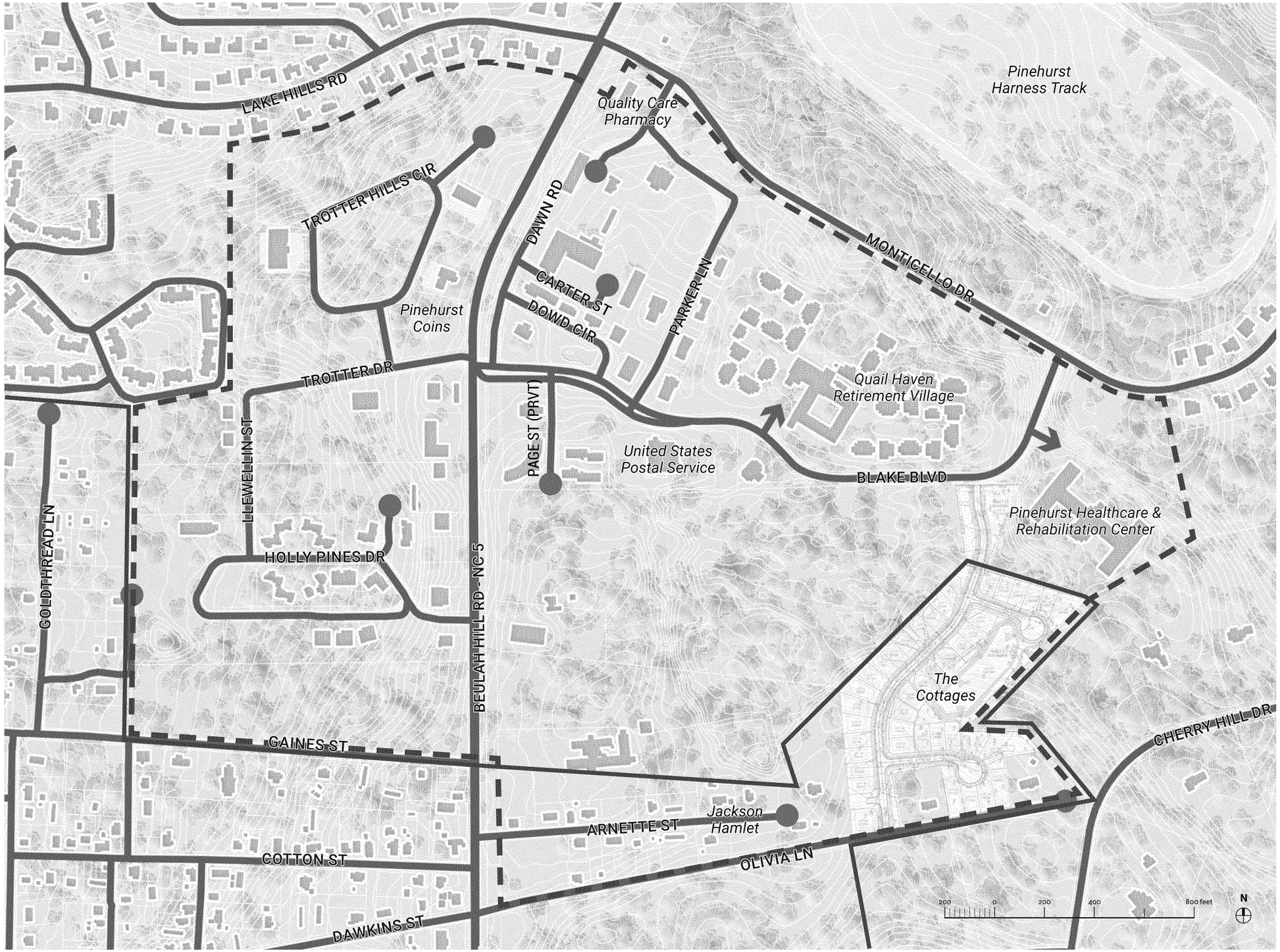
- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- BUILDING FOOTPRINTS
- HISTORIC DISTRICT OVERLAY

Street Network

The Pinehurst South study area spans Beulah Hill Road - NC-5, a major connector street that provides direct access to the Village Center to the north and US 501 to the south. Neighborhood streets are organic and disconnected with many dead-end conditions throughout the study area.

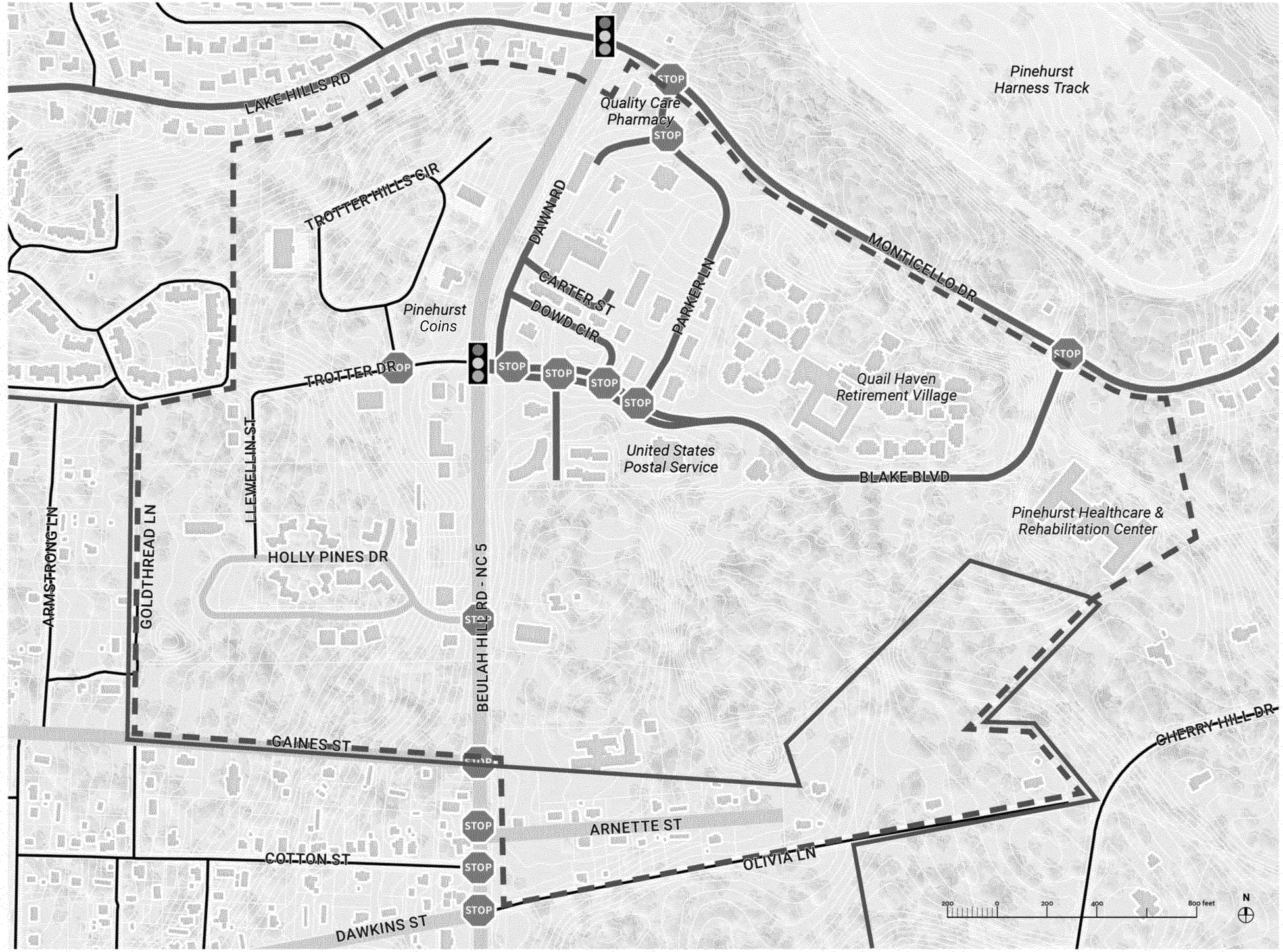
KEY

- VILLAGE OF PINEHURST
- SMALL AREA PLAN BOUNDARY
- EXISTING ROADS
- EXISTING DEAD END



Posted Speed and Traffic Control

The streets within the study area boundary have a range of posted speeds. Beulah Hill Road - NC-5 is 35 mph. A majority of the neighborhood streets are 25 mph with the exception of Holly Pines Drive which is 10 mph. Stop signs are located at all Beulah Hill Road - NC 5, Blake Boulevard, and Monticello Drive intersections. For added control and safety, traffic signals have been placed along Beulah Hill Road - NC 5 at the intersections of Blake Blvd and Monticello Drive.

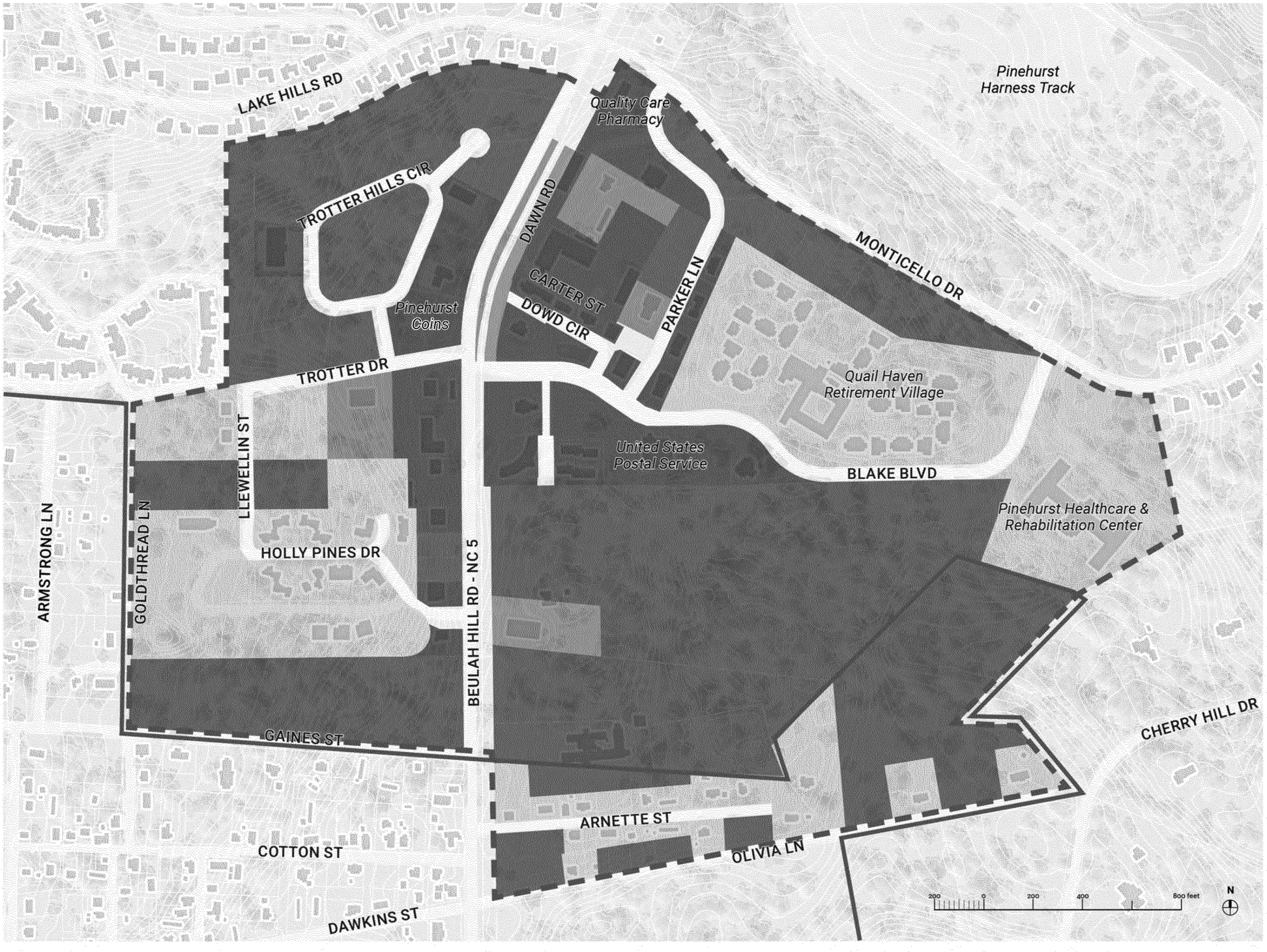


KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- STOP CONTROL
- TRAFFIC SIGNAL
- NO DATA AVAILABLE
- 10 MPH
- 25 MPH
- 35 MPH
- 45 MPH
- 55 MPH

Land Use

The study area includes a mix of land uses. A majority of the commercial uses are centered along Beulah Hill Road - NC-5 with residential uses and large vacant properties surrounding the commercial core. A large percentage of the study area is vacant or underutilized.



Zoning

A majority of the eastern half of the study area is zoned Neighborhood Commercial (NC) with a mix of Office and Professional (OP) and Residential (R5) zones. The western half of the study area is Office and Professional (OP) to the north with Residential Multifamily (RMF) to the south.



Existing Zoning and Permitted Uses

The following zoning districts exist within the Pinehurst South Small Area Plan boundary. For a full matrix of all zoning districts and permitted land uses, reference Section 8.5 of the *Pinehurst Development Ordinance* (PDO).

KEY

- ✓ PERMITTED USES
- SR SPECIAL REQUIREMENTS, SEE SECTION 8.6
- SU SPECIAL USE PERMIT REQUIRED, SEE SECTION 4.5
- ✗ PROHIBITED USES

		USES																
		DWELLING - SINGLE FAMILY	DWELLING - TWO FAMILY	DWELLING - MULTIFAMILY	DWELLING - TOWNHOUSE/ CLUSTERED DWELLINGS	DWELLING - MIXED USE	BED AND BREAKFAST HOMES	HOTEL	MEDICAL CLINIC	PERSONAL SERVICES	PROFESSIONAL SERVICES	GENERAL RETAIL	RESTAURANT	CIVIC/CULTURAL FACILITIES	RESIDENTIAL CARE FACILITIES (> 6 RESIDENTS)	PARKING STRUCTURE	Maximum Building Height	NOTES
	R5 - RESIDENTIAL	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	SU	✗	35'	*Intended principal use of land is high-density residential uses, intended to discourage any use detrimental to the residential nature.*
	RMF - RESIDENTIAL MULTIFAMILY	✓	✓	SR	SR	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	35'	*Intended principal use of land is multi-family and/or single family dwellings, intended to discourage any use that would be detrimental to the residential nature.*
	NC - NEIGHBORHOOD COMMERCIAL	✗	✗	✗	✗	SR	✗	✗	✓	✓	✓	SR	SR	✓	✓	✗	35'	*Intended principal use of land is small scale commercial, retail, office and service to residential districts*
	OP - OFFICE & PROFESSIONAL	✗	✗	✗	✗	SR	✗	✓	✓	✓	✓	✗	SU	✗	✓	SR	35'	*Intended to provide for limited office and retail development, as a transition between business districts and residential land uses*

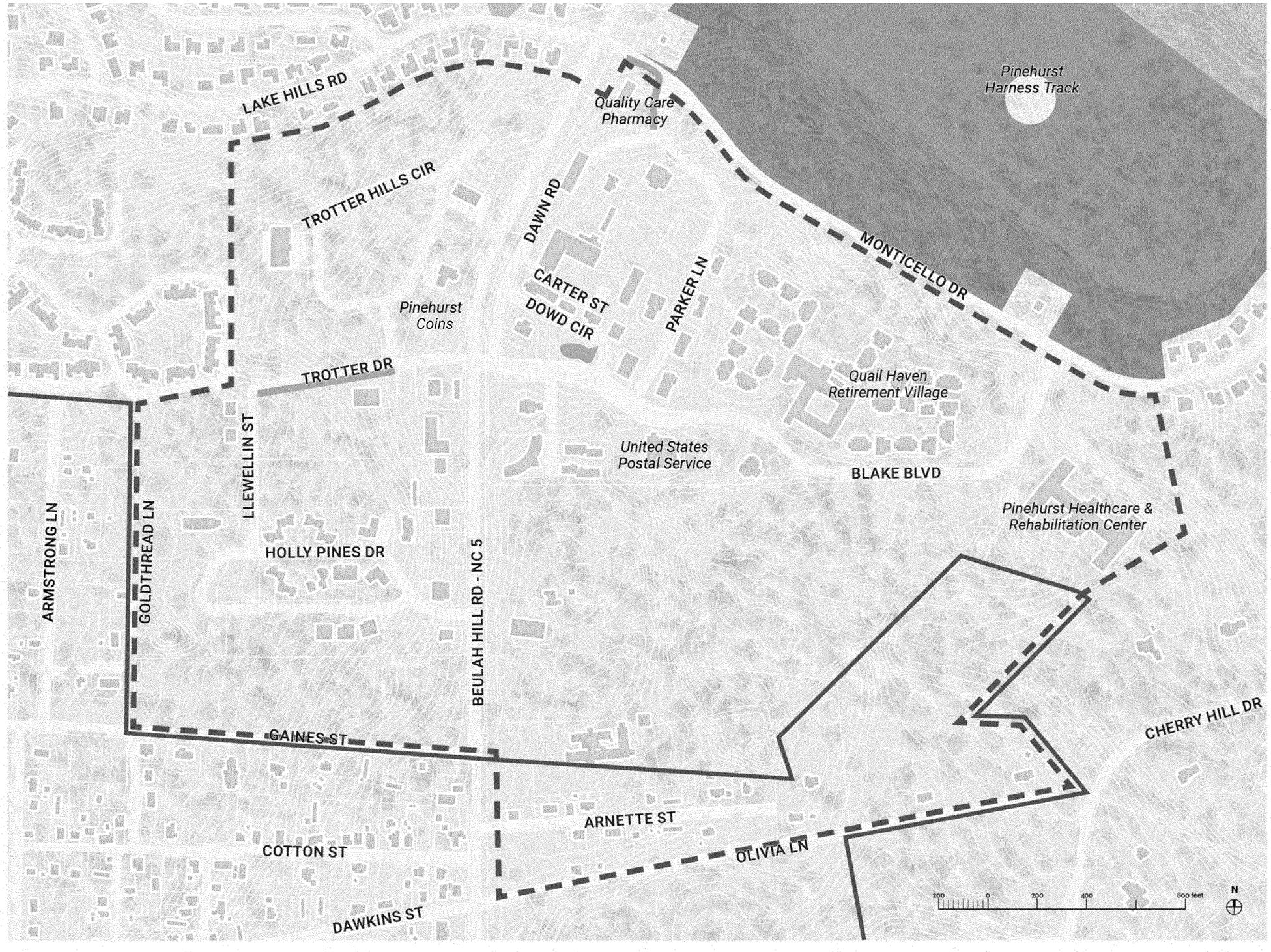
Topography

The topography of the study area is characterized by a natural ridge line along Beulah Hill Road - NC-5. The study area sits at a plateau along the eastern side with grades sloping downward towards Pinehurst Lake.



Open Space + Trails + Sidewalks

The study area contains no dedicated public open space or trails within its boundary. There are only two segments of sidewalks that currently exist on parker Lane and a portion of Trotter Drive. Just north of the study area is the Pinehurst Harness Track, one of the oldest continuously operating equine sports facilities in the state.



KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- GREENWAY TRAILS
- WALKWAY TRAILS
- SIDEWALKS
- PARKS/ OPEN SPACE

2.3 MARKET ANALYSIS SUMMARY

Background and Objectives

A Market Analysis report was prepared by Duggal Real Estate Advisors, LLC (DREA); the following pages provide a summary; the full report can be found on the project website: https://engage.vopnc.org/smallareaplans. The data was collected in November and December 2020 and January 2021.

The market analysis is one step in the process to determine the feasibility of land uses within the Village of Pinehurst and the plan areas. It ascertains the quantitative and qualitative aspects of demand for land uses that might be appropriate for future development in the plan areas and quantifies the potential scale and timing of these uses.

Also known as the Highway 5 Commercial Area, Pinehurst South is an approximate 290 acre limited growth and redevelopment area on the Village's south side containing approximately 145 parcels.

Summary of Market Opportunity

For the market analysis, DREA examined six different land uses: for-sale residential, for-rent residential, retail, office, hospitality, and golf. The following is a summary of the opportunity for each of the land uses in the Pinehurst South plan area.

The overall market opportunity takes into account the current and projected future market conditions, future demand potential, and the suitability for the land use within the Village.

Summary of Demand

For each of the land uses, DREA completed a demand model to understand the future potential of the land use within the Village or Moore County, depending on the land use. To determine how much of each land use would likely locate within the plan areas, it was necessary to consider where else within the Village the land use could be located. For example, if there is demand for one rental project every three to eight years within the Village, it cannot be located in both planning areas, but in reality, it could be located in either one or another location in the Village, making it difficult to assign demand.

For many land uses, there has been and will be more demand for the product type within the Village than the amount of supply that has been or will be available (i.e., more houses would likely sell if they were available).

Summary of Demand for Land Uses within Plan Areas

DREA then considered how much of the demand could be located within the plan areas if the area was zoned for it, landowners were interested in selling, and developers would build it. While the market analysis quantifies realistic development opportunities, actual land use allocation is guided by planning exercises, site constraints, the desired vision, and stakeholder input, in balance with market demand.

The potential for most of the land uses is present in both plan areas. Although there is some flexibility in these numbers as stated before, DREA put together guidelines based upon the market to help the planning team understand the magnitude of demand in each of the plan areas. Below is the demand summary for Pinehurst South.

For-Sale Residential

- Likely a stand-alone residential community as opposed to mixed with other product.
- Given land availability, could have 1-2 projects. Each would be 30-50 units.
- However, the demand for this product is deep, and the planning area can support as much for-sale product as desired.
- Could be either single-family detached or attached product.
- Pricing would vary based upon product type and positioning, but would likely be in the range of $250,000 to $450,000.

For-Rent Residential

- Could be either a stand-alone larger community (typically larger, 150-200 units) or integrated into a mixed-use area.
- Integrated into a mixed-use area, the apartments would still likely be horizontal mixed-use (e.g. the apartments are next to the retail and office, not above). This would likely be a smaller project (80-120 units).
- Rents would be similar to the newest apartments at the time of construction. At this point, the newest apartments in the market are The Greens at approximately $1.35/SF. At an average size of approximately 1,000 square feet, that would equate to a rent of approximately $1,350 per month.

Retail

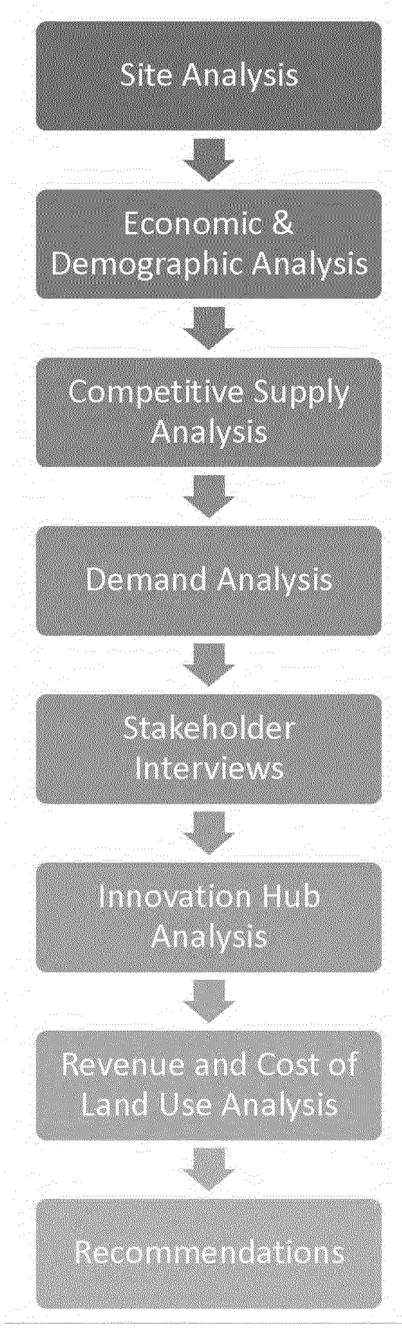
- Any retail would prefer to be located and accessed off of NC-5. If a project were created on the east side of NC-5, it would still be important to have NC-5 visibility.
- Could be a stand-alone shopping center on the west side of NC-5. This would depend on having an anchor within the project such as a grocery store or drug store. The size of the center would depend on what type of anchor, ranging from 50,000-80,000 SF in size total. This would likely not materialize for some time as the area continues to develop and mature.
- There is also demand for retail on the east side of NC-5. Due to access issues, it would be small-scale, and just to support local businesses and residents. There would likely be less than 10,000 SF total.
- If there was a shopping center on the west side of NC-5, the retail on the east side would be more limited, and vice versa.
- Any retail located within Pinehurst South would be locally serving.
- The maximum amount of retail in the area is likely to be 80,000 SF with a grocery store, and less than 40,000 SF without a grocery store at build-out.
- Rents would need to be $24-$30/SF to support new construction

Office

- Office could either be like the product available at Turnberry (small format, 1-2 story) or integrated into a mixed-use center.
- Although there is not a lot of office demand annually, given the limited amount of office land available in other areas, this would be an appropriate location to save land for future office use.
- Even at 2,000 SF of office per year, in 50 years, the total amount would be 100,000 SF. Tenants and owner-occupied space would be a collection of medical, locally-serving professional services, and potentially related to the USGA.
- Rents for office would be in the $18-$22/SF range.
- Part of the area could be a modified Innovation Hub – meaning it could be planned to attract and facilitate companies and technologies related to golf, but be willing to accept other industries and users as well.

Hospitality

- The planning area could support a hotel if it were part of a mixed-use area. If there were enough businesses, it could support the workers in the area. Otherwise, it would likely support tourists. Type of hotel depends on place creation.
- A new hotel would likely have around 100 rooms.



Overall, Pinehurst South is best suited for residential and office uses. Hospitality could be an option as well. Large-scale retail would be challenging given the access issues, but locally-serving retail would be viable.

Strengths

- Land availability
- Direct access to Pinehurst Resort via NC 5
- New development in area
- Strong businesses in area (such as Quail Haven Retirement Village)

Weaknesses

- No common theme to buildings
- Unrelated land uses
- Traffic issues

Opportunities

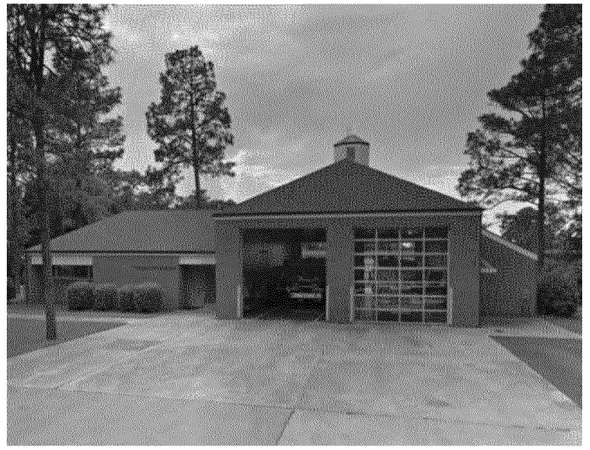
- Capitalize on growth along NC 5
- Concentration of public and semi-public services (post office, fire station, VA services)
- Create a distinct identity for area
- Build off of USGA
- Infill development

Threats/Challenges

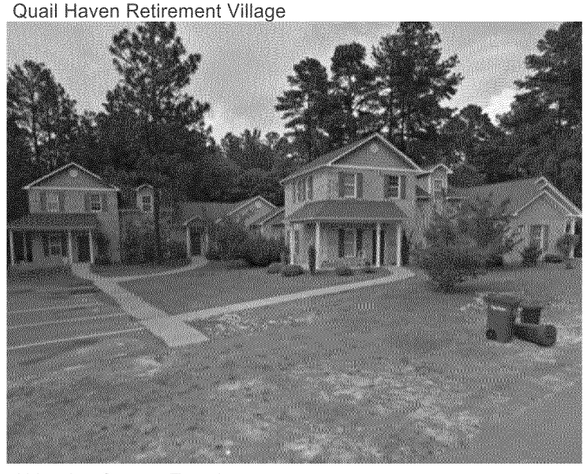
- RR crossings & limited access
- Significant amount of vacant land south of the study area along NC Hwy 5 that could take demand potential away



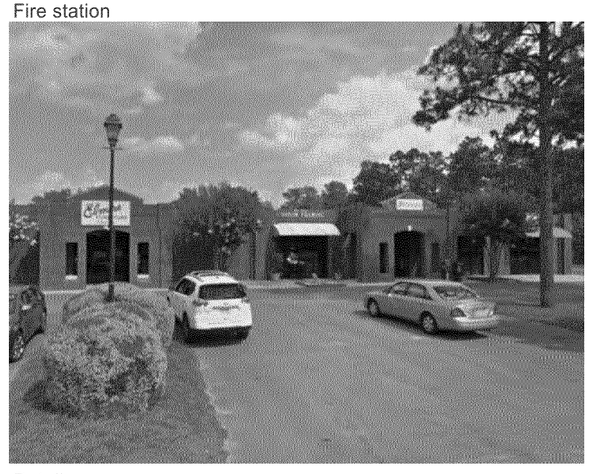
Quail Haven Retirement Village



Fire station



Abingdon Square Townhomes



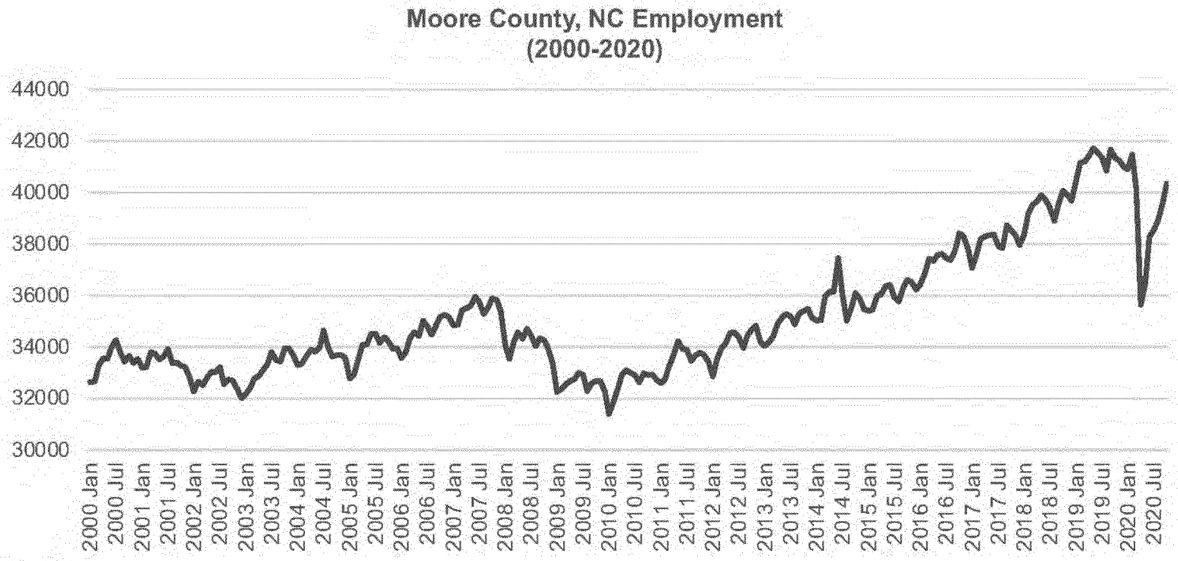
Retail



Veterans Guardian Claim Consulting

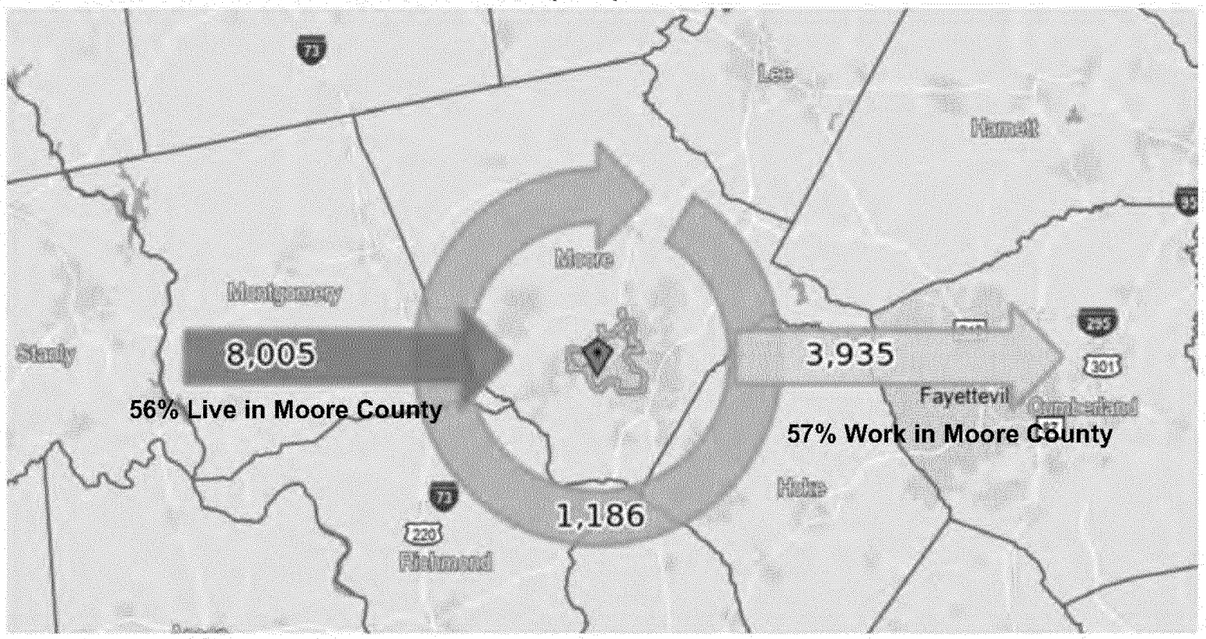


Open space along Blake Blvd.



Source: BLS

Inflow and Outflow of Workers in Pinehurst (2017)



Source Census on the Map

Jobs by Industry in Pinehurst (2020)

Industry	Businesses	%	Employees	%
Health Care and Social Services	575	54%	5,880	52%
Accommodation and Food Services	42	4%	2,839	25%
Other Services - Repair, Personal Care, Laundry, Religious, etc.	69	6%	434	4%
Professional, Scientific, and Technical Services	58	5%	396	3%
Arts, Sports, Entertainment, and Recreation	23	2%	358	3%
Retail: Home, Food, Automobiles, Personal Care	35	3%	262	2%
Education	11	1%	257	2%
Real Estate and Rentals	47	4%	234	2%
Public Administration	12	1%	173	2%
Banking, Finance and Insurance	56	5%	145	1%
Construction	25	2%	89	1%
Information	12	1%	85	1%
Other	108	10%	248	2%
Total	1,073	100%	11,400	100%

Source: North Carolina Department of Commerce, Labor & Economic Analysis

People Who Work in Pinehurst (Where Workers in Pinehurst Live)

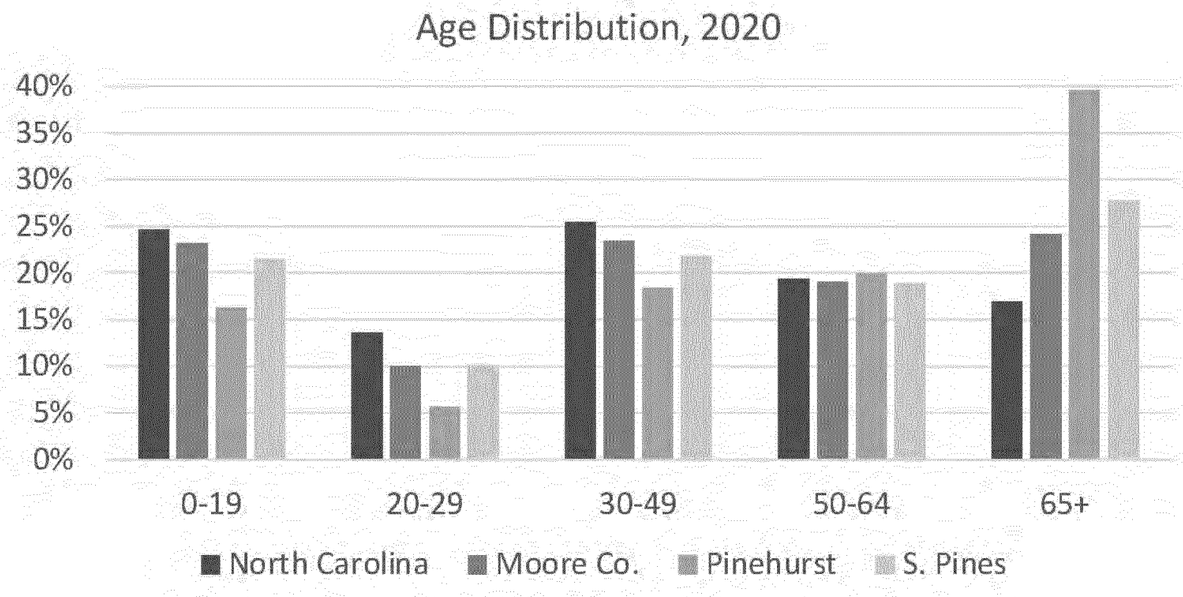
Of the people that work in Pinehurst, approximately 50% of them are aged 30-54, while 32% are over the age of 55, and 18% are under the age of 29.

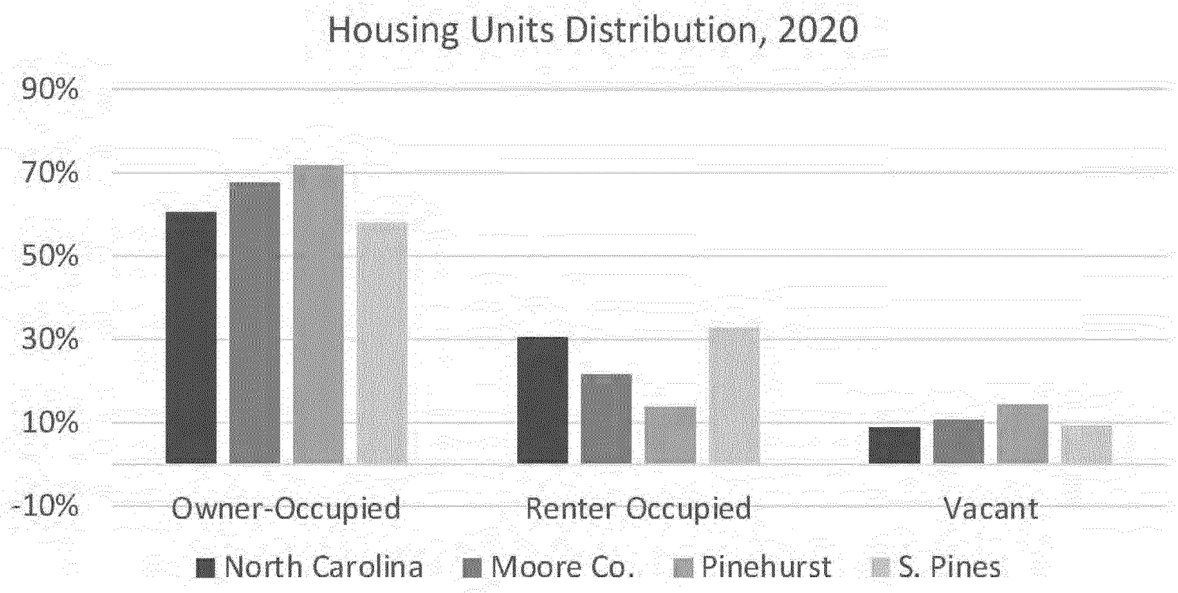
Almost half of the workers make more than $3,333 per month. Over 50% of the workforce has some college, an Associates degree, Bachelor's degree or higher.

Household Data for NC, Moore County, Pinehurst, and Southern Pines (2020-2025)

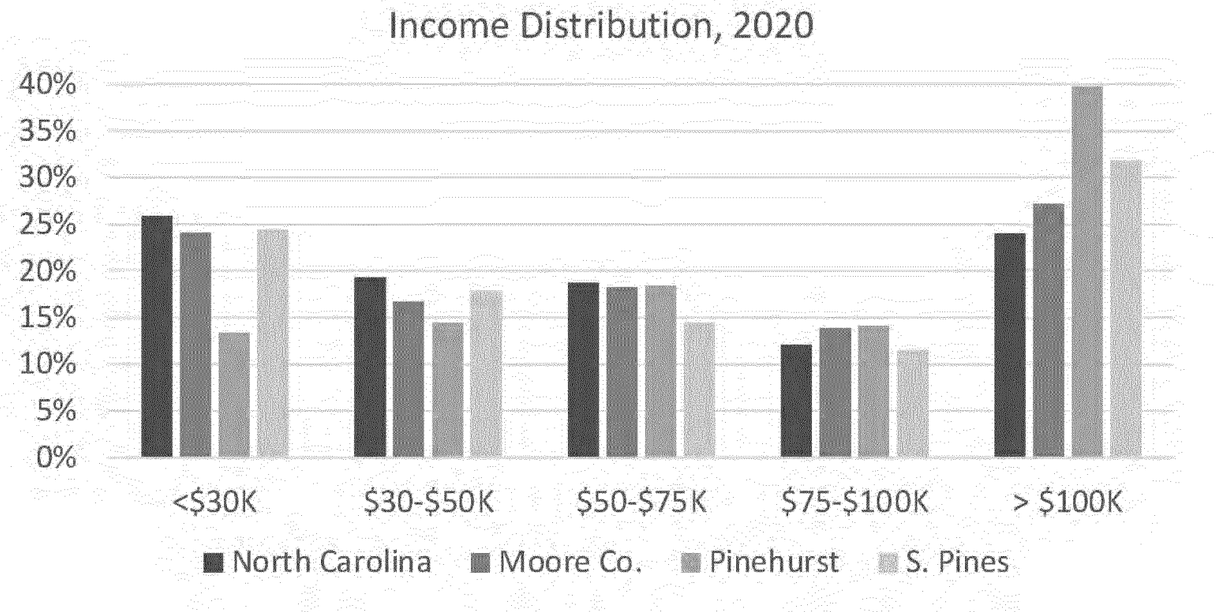
Geography	2020	2025	Growth	Annual Growth Rate
North Carolina	4,341,543	4,494,724	153,181	0.7%
Moore County	43,651	45,169	1,518	0.7%
Moore Co. as % of NC	1.0%	1.0%	1.0%	
Pinehurst Village	7,885	8,100	215	0.5%
Pinehurst as % of Moore	18.1%	17.9%	14.2%	
Southern Pines Town	7,142	7,207	65	0.2%
Southern Pines as % of Moore	16.4%	16.0%	4.3%	

Source: AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis

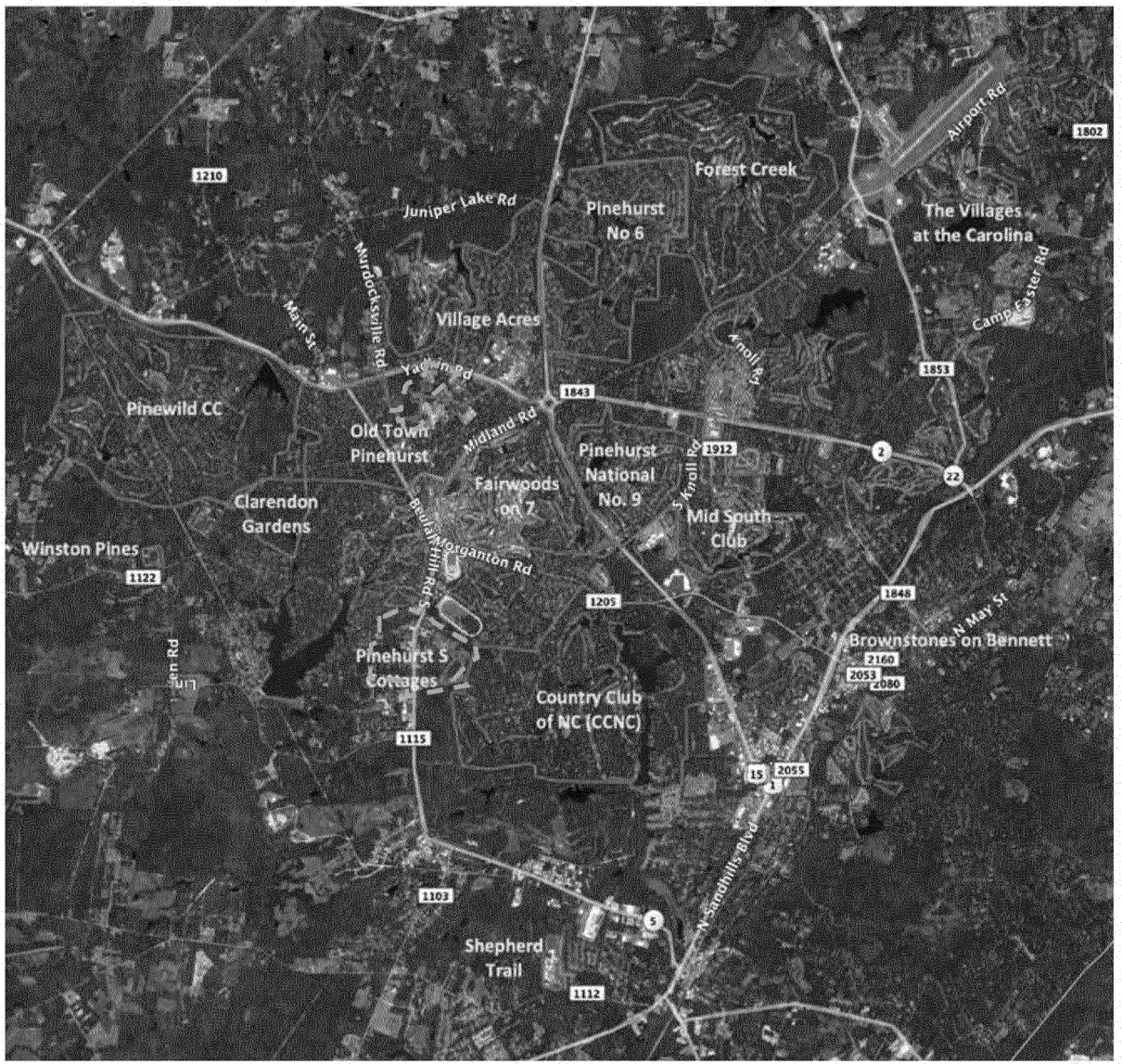




Source: AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis



Source: AccessNC, North Carolina Department of Commerce, Labor and Economic Analysis



Permits and sales continue to increase

Healthy market with strong demand fundamentals

For-sale in Pinehurst tends to be single-family detached

Demand is high

Home prices continue to rise in Pinehurst - still more attainable/affordable than similar housing in other parts of the country

New homes in non-golf oriented communities are $300,000 to $500,000 on average

New, infill housing in golf-oriented master-planned communities are $450,000 to $750,000

VP

Single-family homes selling in Village Place tend to be priced from $200,000 to $400,000. **Two new homes sold for approximately $300,000**

New product within the study area could be a combination of small lot single-family detached, townhome/attached, and possibly condominium product

The price point would likely be above existing homes within the study area

PS

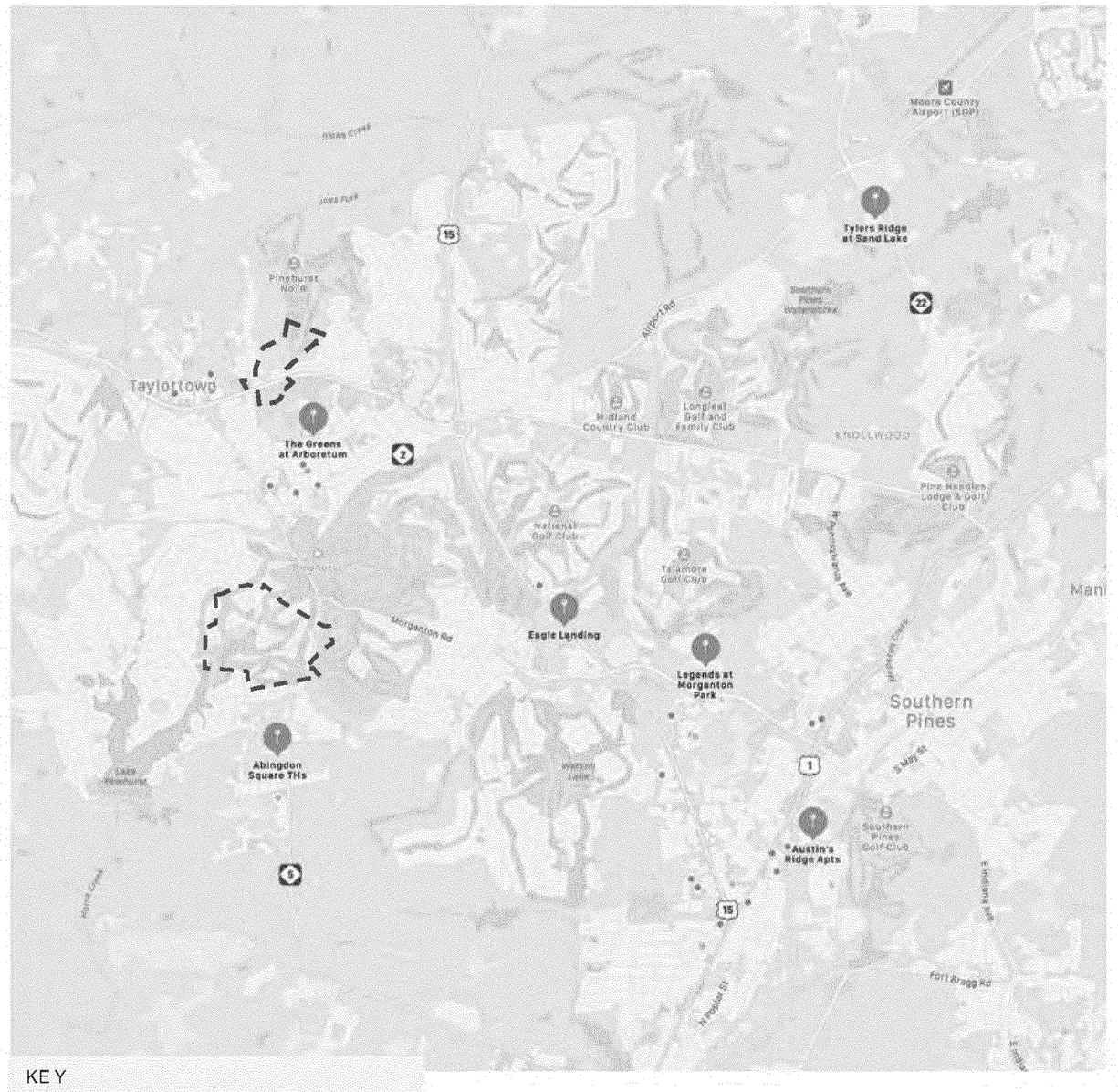
There are very few for-sale houses within the Pinehurst South study area

Nearby townhouse community built in the late 1980s sells for approximately $180,000 and $230,000

For-sale homes would be marketable in the study area. There could be a combination of small lot single-family detached and townhome/villa product

The pricing would be above the existing product, and likely within the middle band of new houses in the Pinehurst area

Pinehurst is projected to see strong owner household growth over the coming years; both Village Place and Pinehurst South could capture this growth and help create new, walkable, mixed-use neighborhoods



Vacancy continues to remain low (3%) despite the addition of 180 apartment units since 2020

Most Pinehurst rental product is single-family detached homes

Strong, in-balance apartment market

Demand is moderate

Rental rates, although not overly high compared to more suburban areas, have continued to rise in recent years

New rental product in Pinehurst is likely to rent at the higher end of the market, similar to The Greens at Arboretum

One bedrooms range from $1.43 to $1.63 per square foot, two bedrooms range from $1.18 to $1.26 per square foot, and three bedrooms range from $1.25 to $1.55 per square foot

The Greens, a relatively new apartment complex, is located within Village Place

Additional new for-rent residential would be marketable within the study area

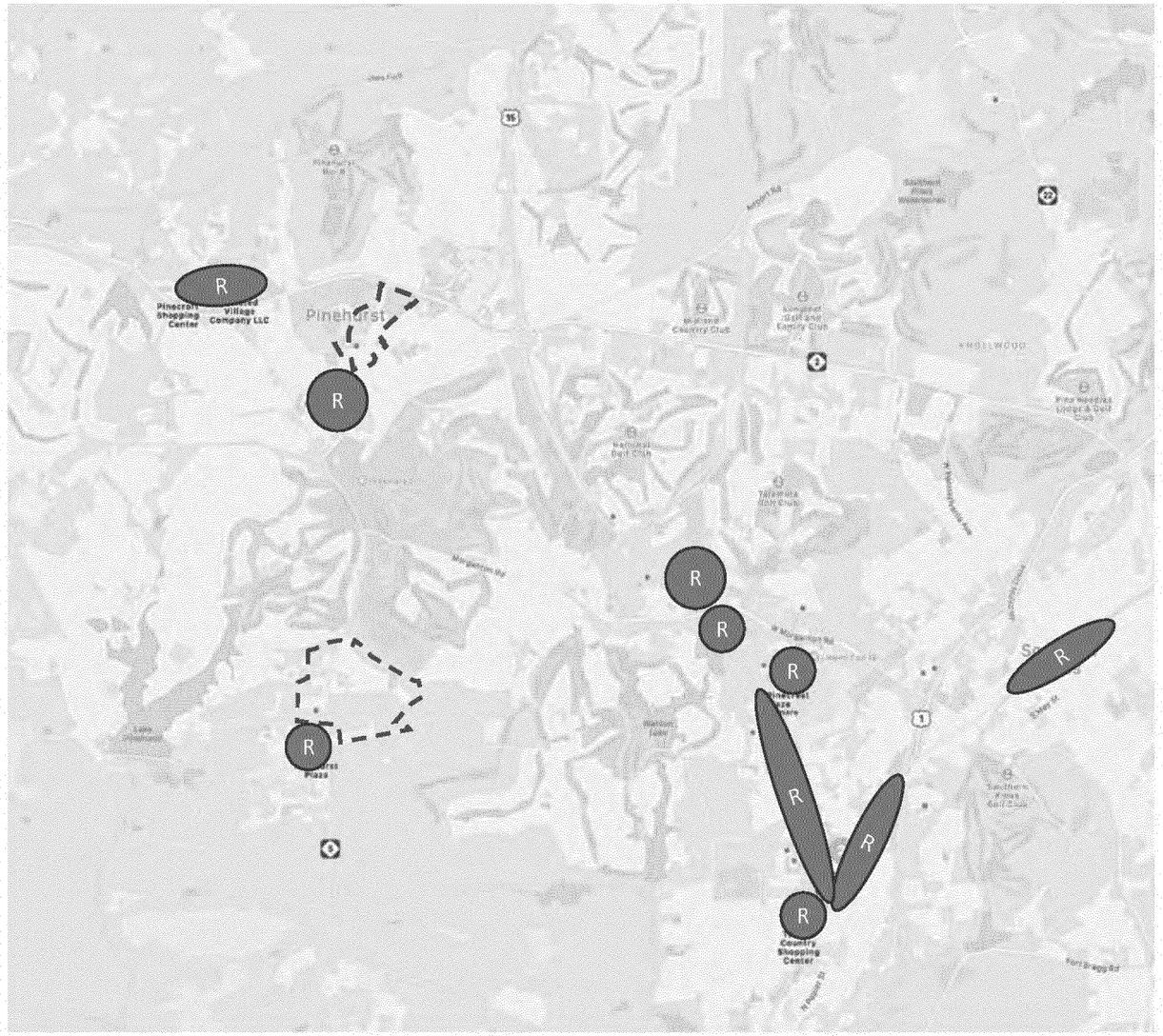
It is walkable to the Village Core, is close to services and amenities, and close to open space

Pinehurst South currently has a rental townhome community, Abingdon Square Townhomes, and the Inn at Quail Haven Village, a senior continuing care retirement community (CCRC)

It would be a marketable location for a rental community

It would likley be positioned below new apartments in Village Place given it is not walkable and farther from services and amenities

Pinehurst is projected to see modest rental household growth over the coming years; both Village Place and Pinehurst South could capture this growth and help create new, walkable, mixed-use neighborhoods



KEY

SMALL AREA PLAN (SAP) BOUNDARY

R RETAIL SHOPPING

Retail occupancy is currently down due to Covid-19, but still performing relatively well compared to other similar parts of the state

Occupancy should increase after the pandemic is over

Demand is moderate, and tied to household growth

The average rental rate has been relatively stable

Rental rates are approaching the amount needed for new construction (roughly $24 to $30/SF)

VP

Village Place is adjacent to the Village Center

Small retail cluster along Rattlesnake Trail. This area could be built upon

Village Place would be an appropriate location for retail including restaurants, entertainment, tourist-oriented, and locally serving retail.

Larger format retail would prefer to be along NC 211, while smaller retail could be an extension of the Village Core, brewery, and retail along Rattlesnake Trail

PS

Pinehurst South is adjacent to some underperforming, older retail

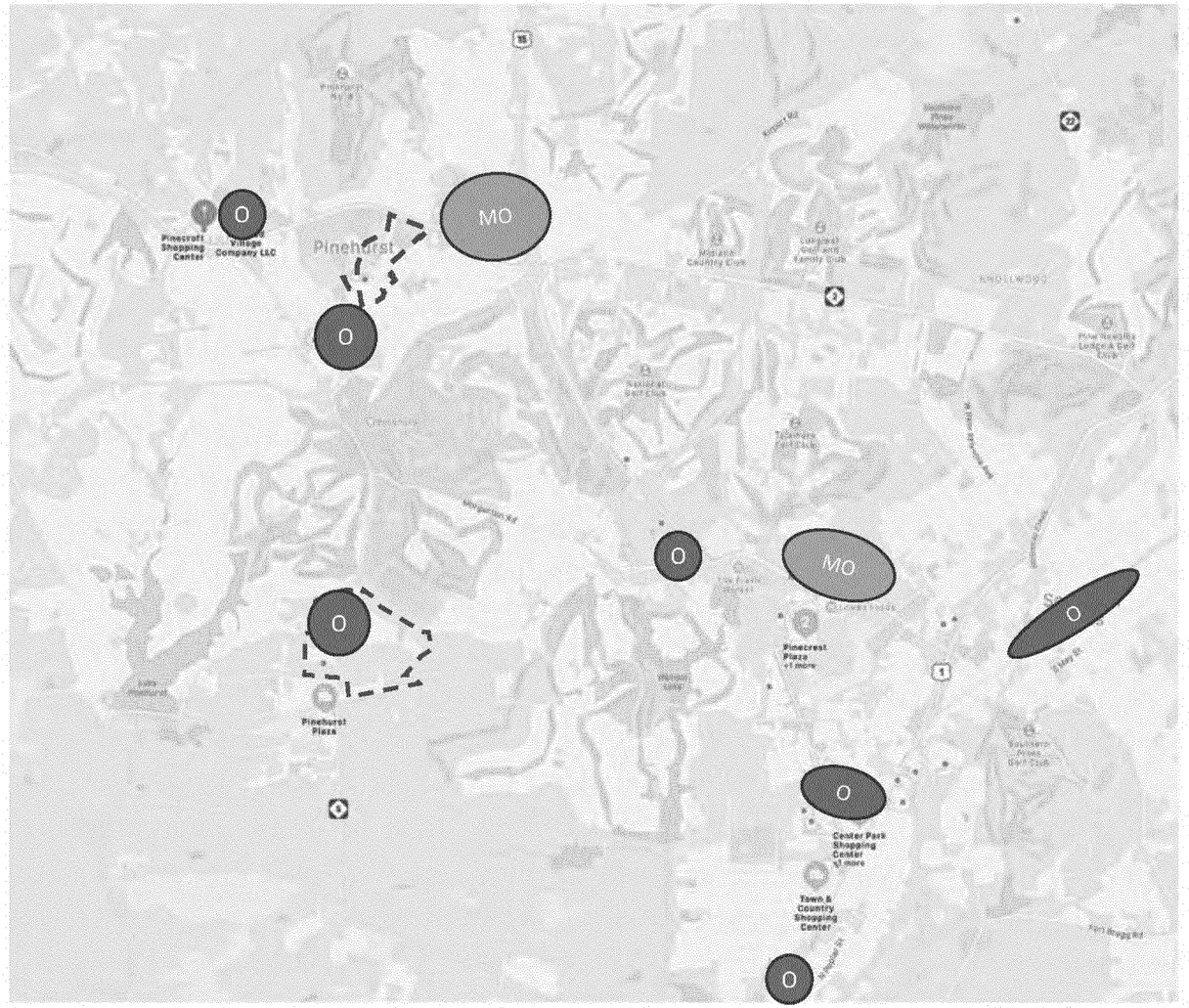
A few retail businesses in PS including the new ABC store, bank, and framing shop

Pinehurst South reasonable location for retail. Main challenge on eastern side of NC 5 is access – retail needs good access, and the rail road crossings make that difficult

Western side of NC 5 would be a good location for locally-serving retail and perhaps shopping center

Pinehurst is projected to see modest retail growth over the coming years; both Village Place and Pinehurst South could capture this growth and help create new, walkable, mixed-use neighborhoods.

Office



KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- O — GENERAL OFFICE
- MO — MEDICAL OFFICE

Occupancy continues to remain high and there has been turnover within buildings

New space has been constructed and slowly leased within the area

Pinehurst office is primarily medical and/or locally serving

Demand is relatively low

Rental rates for most tenants remains below the threshold to build new product

New office product can be built when leases reach $18-$22/SF

This is starting to happen through the Pinehurst area, so new office construction begins to be feasible

There is very little office currently located within Village Place

Location would be appropriate for small-scale office that is locally-serving and generated such as accountants and real estate professionals

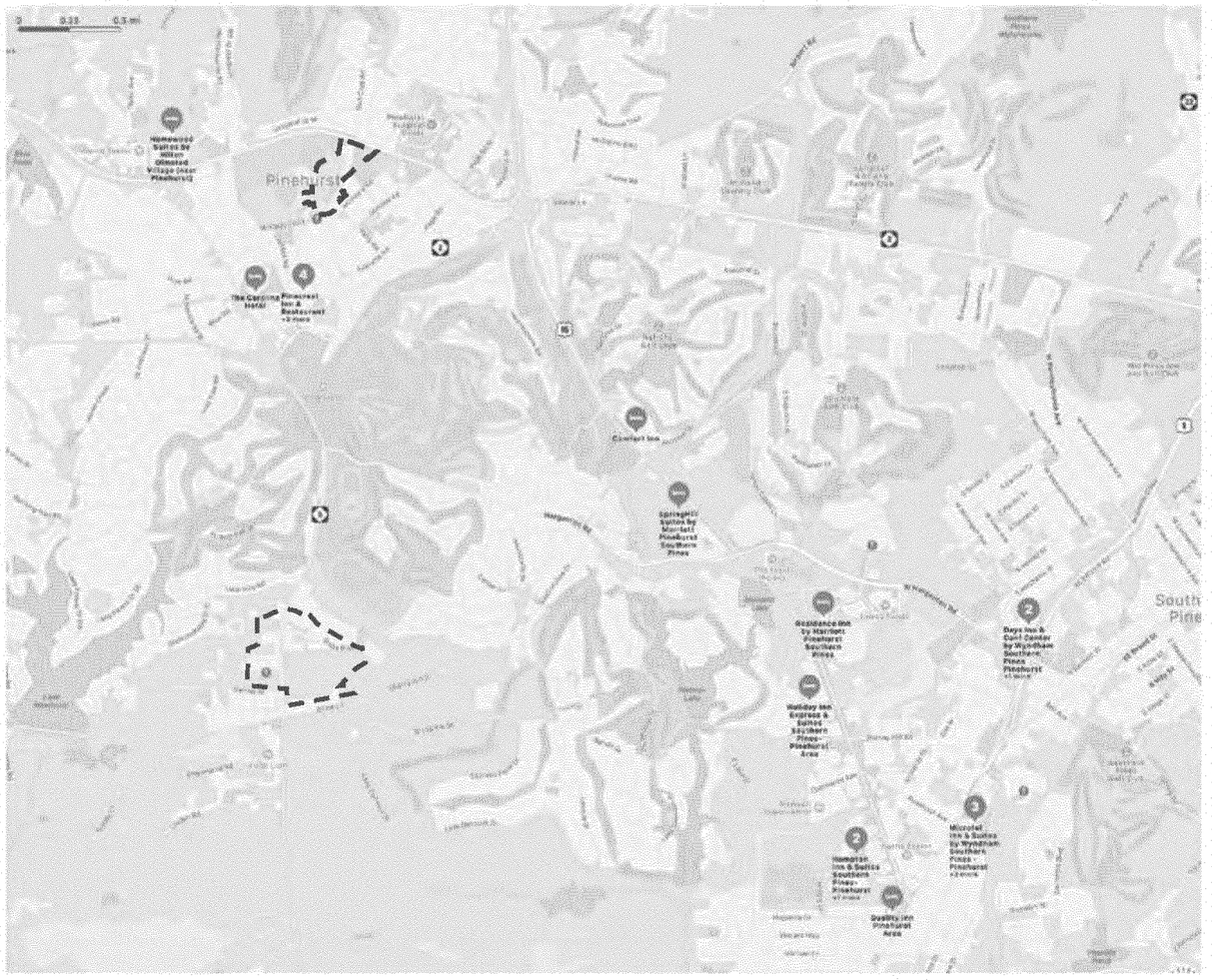
Pinehurst South has a fair amount of office

Some of it is medical office, such as dentists, and some is locally-serving such as financial planners

Location would be appropriate for both office mixed in with other uses as well as more stand-alone, larger office given land availability

Pinehurst is projected to see limited office growth over the coming years; both Village Place and Pinehurst South could capture this growth. In VP it would be part of a walkable, mixed-use neighborhoods. In PS it could also be more office-park like space.

Hospitality



KEY

SMALL AREA PLAN (SAP) BOUNDARY

HOTELS

Occupancy is currently down due to Covid-19

After the pandemic, market is likely to fully rebound to previous occupancy levels (65%)

Demand is low to moderate

The Average Daily Rate has remained strong despite Covid-19 at $131 for 2020

RevPAR is down to $61 for 2020, but should return to pre-Covid levels ($90 in 2019)

VP

The Manor is located within Village Place. 42 rooms and recently renovated. Higher-end hotel in the area

Village Place good location for additional hotel rooms. Close to downtown, NC 211, and could appeal to golf, medical, and business travelers

PS

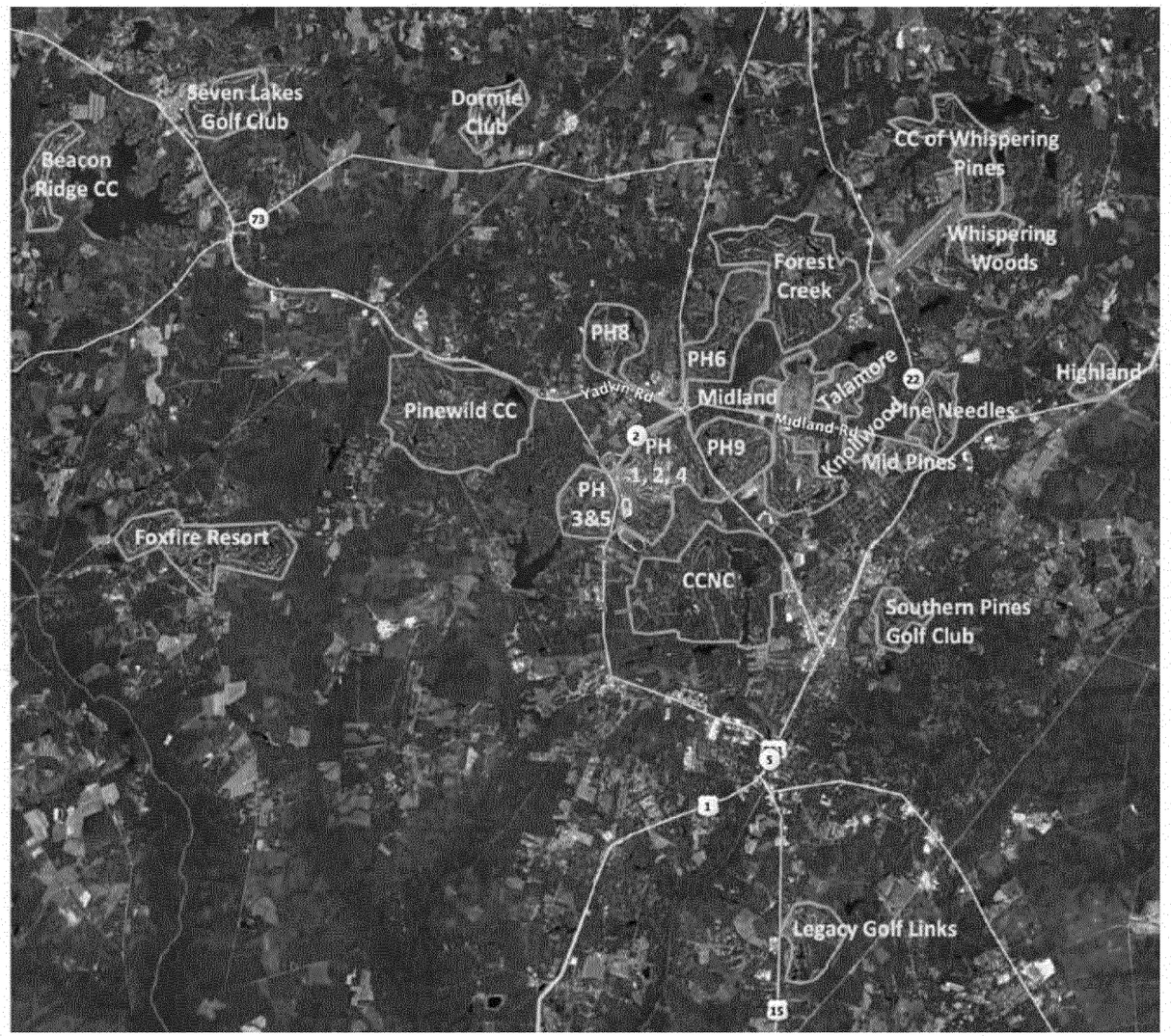
There are no hotels currently in or near Pinehurst South

Majority of hotels in the area are concentrated either close to Pinehurst Center or along the major highways including US 15-501 and US 1

Currently, Village Place would be a more attractive location for a hotel than Pinehurst South

Pinehurst is projected to see modest hospitality growth over the coming years; both Village Place and Pinehurst South could capture this growth and help create new, walkable, mixed-use neighborhoods.

Golf



KEY

SMALL AREA PLAN (SAP) BOUNDARY

GOLF COURSE OUTLINE

Participation is currently up in the US for the first time in many years

Pinehurst has also seen an increase in the amount of golfers and rounds played this year

According to the National Golf Foundation, the average round in the US costs $61 in 2020

Pinehurst has rates far above the national average for golf

VP

Village Place cannot accommodate a new golf course

Given the nature of the other land uses, this is not as good of a location for other golf uses that might be appropriate in Pinehurst South

PS

Pinehurst South cannot accommodate a new golf course

It could be an appropriate location for golf operations facilities

Pinehurst and the surrounding area are projected to see modest golf growth in the coming years; neither Village Place nor Pinehurst South could support a golf course. Pinehurst South could be a viable location of golf-support activities (maintenance, back of house, etc.).

Summary of Market Opportunity

Land Use	Overall Market Opportunity	Village Place	Pinehurst South
For-Sale Residential	✓✓✓✓✓	✓✓✓✓	✓✓✓✓
For-Rent Residential	✓✓✓	✓✓✓	✓✓✓
Retail	✓✓✓✓	✓✓✓	✓✓✓
Office	✓✓	✓✓	✓✓
Hospitality	✓✓✓	✓✓✓	✓✓✓
Golf	✓✓	O	✓

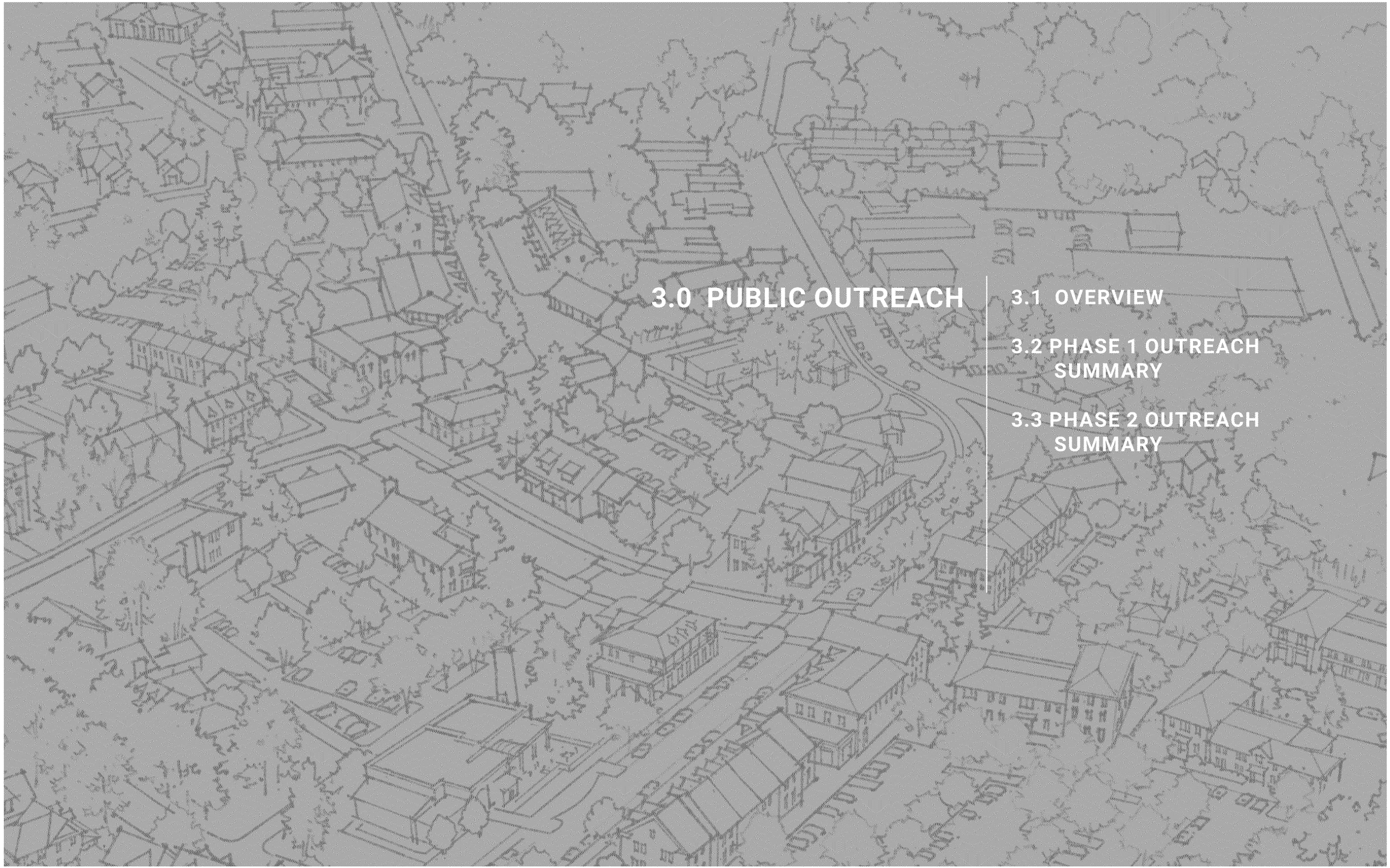
Key: ✓✓✓✓✓ = best, ✓ = worst, O = none

Land Use	Demand Potential	Locations within Pinehurst
For-Sale Residential	80-120 homes/year	Almost anywhere
For-Rent Residential	15-25 units/year	Major roads, VP, PS, Village Cntr
Retail	20-25,000 SF/ every 5 years	Major roads, VP, PS, Village Cntr
Office	Up to 5,000 SF/year	Medical area, VP, PS, Village Cntr
Hospitality	25 rooms/yr. in Moore Co.	Resort, Village Cntr, PS, VP
Golf	2-3 courses over the next 10 years in Moore Co.	Focus Area 1 is the only area with space

Summary of Demand for Land Uses within Planning Areas

Land Use	Pinehurst South
For-Sale Residential	Unlimited (up to build-out capacity) 1 project would sell approximately 15-25 homes per year
For-Rent Residential	1-2 projects of up to 200 units each, depending on the location Timing depends on where else apartments have been constructed
Retail	Up to 80,000 SF with grocery, 40,000 SF without grocery
Office	Up to 100,000 SF Limited amount per year. 5,000 SF total in Village. Pinehurst South could capture some of that. Could increase, depending on impact of USGA
Hospitality	1 hotel with approximately 100 rooms
Golf	Possibly some support functions (although the land probably has a higher and better use than maintence for golf)

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3.0 PUBLIC OUTREACH

3.1 OVERVIEW

3.2 PHASE 1 OUTREACH SUMMARY

3.3 PHASE 2 OUTREACH SUMMARY

3.1 OVERVIEW

Public participation helps ensure the plan addresses community concerns and ideas, foster an inclusive and transparent planning process, identify key opportunities and priority areas, and build momentum to move a planning process towards adoption and implementation. Stakeholder input and feedback were critical to creating a community-supported vision for Pinehurst South

A critical task throughout the planning effort was to gather stakeholder input on existing conditions and feedback on proposed concepts. This engagement was conducted through a variety of outreach methods.

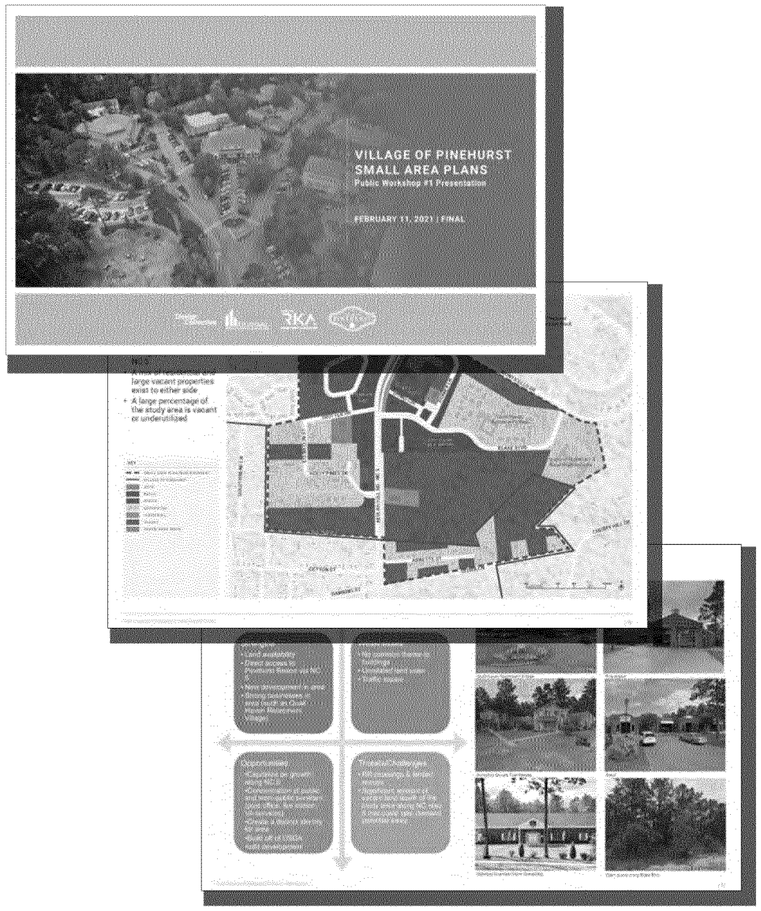
Stakeholder Interviews

Throughout December 2020 and January 2021, the consultant team conducted over 20 key stakeholder interviews, discussing the two plan areas with Village staff, appointed and/or elected officials, agency representatives, committee chairs, residents, local businesses and merchants, golf and tourist industry representatives, major employers, property owners, developers, brokers, and others to further understand their viewpoints.

Public Workshops

The consultant team and the Village of Pinehurst held three public workshops to elicit feedback and present work to stakeholders. The workshops were held as follows:

- In February 2021, Public Workshop 1 was held to outline a vision for the future of the two Small Area Plans with public input and guidance. There were 148 registrants (including consultant and Village staff team members), and approximately 100 attendees participated virtually, due to COVID-19 precautions.
- In early June 2021, Public Workshop 2 was held to solicit further feedback on the proposed concepts for the two Small Area Plans. There were 88 registrants (including consultant and Village staff team members) and approximately 59 attendees participated virtually, due to COVID-19 precautions.
- In February 2022, an open house was held to present the draft Pinehurst South Report. Approximately 108 attendees participated in person at the Fair Barn.



Presentation images from Public Workshop 1



Screenshot images from Virtual Public Workshop 1

3.2 PUBLIC WORKSHOP 1

Overview

In February 2021, the consultant team and Village of Pinehurst held Public Workshop 1 (of 3) to outline a vision for the future of the two Small Area Plans with public input and guidance.

The Public Workshop was held virtually due to COVID-19. There were 148 registrants (including consultant and Village staff team members), and approximately 100 attendees participated. Darryn Burich (VOP) introduced the team and gave an overview of the project goals and objectives. Cecily Bedwell and Caitlin O'Hara (DCI) presented the project team, project introduction, project schedule and Existing Conditions. Melina Duggal (DREA) presented the Market and Economic Analysis.

Breakout Rooms were utilized to give participants the opportunity to ask questions, give input, and listen to other stakeholders. Each breakout room was facilitated by a member of the project team. Additionally, the project website provided outreach materials as well as an online survey and a summary of the presentation.

The following pages summarize the feedback received as a result of Public Workshop 1.

Pinehurst South Polling Questions

The Public Workshop included two rounds of Polling Questions, one for Village Place and one for Pinehurst South. The polls were available live during the Public Workshop and also on the Project website for 10 days following the event. Participants were encouraged to use the polling questions to express their views on the strengths, weaknesses, and opportunities relating to each Small Area Plan.

This page shows the cumulative results of the Polling Questions for Pinehurst South.

1. What are the strengths of Pinehurst South, as it exists today? Check all that apply. (Multiple choice)

Proximity to Beulah Hill Rd - NC 5	(38/82) 46%
Proximity to Pinehurst Plaza shopping center in Aberdeen	(17/82) 21%
Proximity to Pinehurst Resort and Pinehurst Harness Track	(40/82) 49%
Mix of Commercial and Residential uses	(32/82) 39%
Large, undeveloped parcels	(45/82) 55%
None of the above	(5/82) 6%

2. What are the weaknesses of Pinehurst South, as it exists today? Check all that apply. (Multiple choice)

"Hodgepodge" / "Mishmash" of building types, styles, uses, etc.	(43/82) 52%
Incompatible development which does not reflect the character of the Village	(45/82) 55%
Large, undeveloped parcels	(6/82) 7%
Lack of Open Space and Community Amenities	(28/82) 34%
Lack of Walkability	(55/82) 67%
Lack of access due to the railroad line, to the east of Beulah Hill Rd - NC 5	(28/82) 34%
Traffic on Beulah Hill Rd - NC 5 or elsewhere that affects this area	(70/82) 85%
None of the above	(0/82) 0%

3. What would you like to see (more) of in Pinehurst South? Check all that apply. (Multiple choice)

Retail – Neighborhood Goods and Services (grocery, pharmacy, florist, dry cleaner, nail salon, etc.)	(37/82) 45%
Retail – General Merchandise, Apparel, and Furnishings (clothing, electronics, bookstore, home improvement store, etc.)	(35/82) 43%
Restaurants (any type: sit-down, take-out, coffee shop, etc.)	(47/82) 57%
Office – General Office	(37/82) 45%
Office – Medical	(32/82) 39%
Residential – Apartments (for rent)	(19/82) 23%
Residential – Townhouses / Condo (for sale)	(24/82) 29%
Residential – Single-Family Detached houses (for sale)	(12/82) 15%
None of the above	(8/82) 10%

4. What is your favorite or most frequented place to visit within Pinehurst South? Choose one.

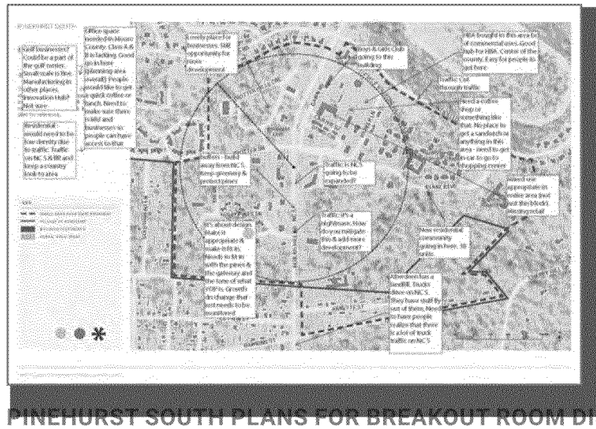
US Post Office	(40) 49%
ABC Liquor Store (...it's ok; this survey is anonymous)	(19) 23%
Businesses within the Trotter Hills Office Park	(3) 4%
Quail Haven Retirement Village (pre-COVID)	(0) 0%
Pinehurst Healthcare & Rehabilitation Center (pre-COVID)	(1) 1%
Another business (a professional office, retail, restaurant, etc.)	(10) 12%
A friend's house	(1) 1%
Other	(4) 5%
I do not spend any significant time here	(4) 5%

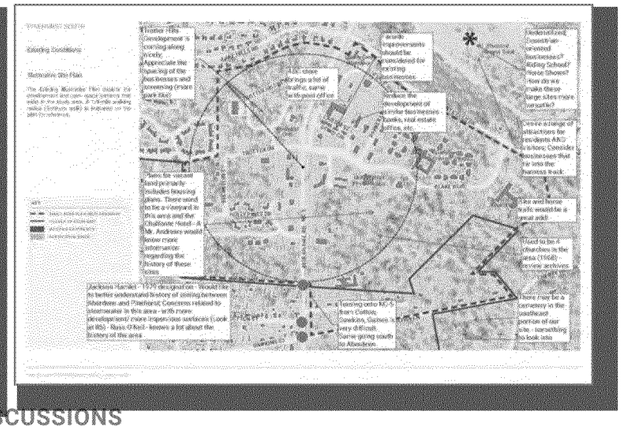
Public Workshop 1 Summary

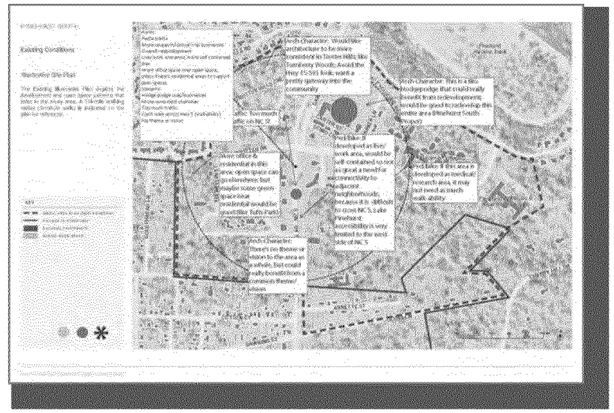
Public Workshop 1 offered the community an opportunity to voice their observations and concerns about the future of Village Place and Pinehurst South. The list below is a compilation of the comments received during the workshop, as well as additional comments received by staff post workshop, for Pinehurst South. For a full list of comments recorded during Public Workshop 1, please visit the project website: www.engage.vopnc.org/smallareaplans.

Land Use

- Development right now is inconsistent
- Strong desire for a public open space in this area
  - Some stakeholders mentioned open space like Tufts Park
  - Build/extend recreational amenities for families in the area
- Low density residential desired by some stakeholders
- Desire for mixed-use:
  - Consider mixed use that disperses traffic, encourages internal circulation
  - This area is currently a bedroom community, needs businesses to help tax base
  - The area between Dawn Road and Parker Lane is seen as an opportunity for mixed-use; it is missing retail right now. A coffee shop or deli would be great – it is easily accessible
- Office space is needed in Moore County – Class A and B is lacking – which would fit this area. However, some stakeholders cautioned against too much office space as COVID has altered the need for it and the future of office is undetermined
- Given proximity to Aberdeen, Rt. 1, and the railroad, Light Industrial may be attracted to this area
- Opportunity for Retail:
  - Along Gaines street
  - Desire for retail uses along Monticello Drive
  - Some stakeholders would like to see a grocery store in this area, while others are happy to go elsewhere
  - Perhaps small-scale businesses, golf businesses, golf centers?
- Desire for office space – clinical/research businesses
- The Innovation HUB as planned in the 2019 Comp. Plan does not resonate with some stakeholders; they are confused by this concept and think it is too much development







PINEHURST SOUTH PLANS FOR BREAKOUT ROOM DISCUSSIONS

The pages above are examples plans shown during the Breakout Rooms for Pinehurst South. For a full reference of these comments, please see the PW 1 Summary document on the project website.

Character

- Pinehurst has numerous neighborhoods that are unique; it is okay to keep them different, but connected to each other
- There is no cohesiveness to character in this area
- Keep country area look
- Trotter Hills coming along nicely, a great opportunity for more development; stakeholders like the park-like setting
- Desire for development like Turnberry Wood
- Landscape:
  - Consider buffers along NC-5 – keep greenery and protect the pines; set development back from the highway.
- Future development needs to fit in with the pines and the gateway and the tone of the Village – growth and change need to be monitored.
- Consider façade improvements for existing businesses near Carter Street; future businesses should vary, not be the same types of uses
- Concern about new vinyl-sided homes and large homes – not sure they match the Village character
- No chain restaurants; no strip centers
- Reuse existing buildings such as Elmore Furniture

Transportation

- Need for an independent, professional traffic study
- Pedestrian:
  - Promote pedestrian circulation over vehicular; make more walkable
  - Walking from residences to retail is desired
  - Desire to cross NC-5 safely
- Vehicular:
  - Traffic on NC-5 is a nightmare and the corridor is littered with trash
  - Trucks on NC-5 from the Aberdeen landfill are a concern; there is a lot of truck traffic
  - NC-5 intersections at Cotton, Dawkins, and Gaines Streets have very difficult turns on both sides
  - Doral Woods exit onto Morganton Road has very traffic heavy
  - Monticello Drive is used as a cut through
  - Future development off Blake Blvd. for 38 homes raises traffic concerns for some stakeholders
  - Residential would need to be low density due to traffic concerns
  - ABC Store and Post Office bring lots of traffic
  - Concern for how to solve traffic; railroad limits widening the roadway.
  - Need for another entrance off Blake Blvd. past the new liquor store
- Need to connect back to Village Center to make this area feel like it is a part of the Village, not isolated/ disconnected
- Consider bike and horse trails near Pinehurst Rehab Center

3.3 PUBLIC WORKSHOP 2

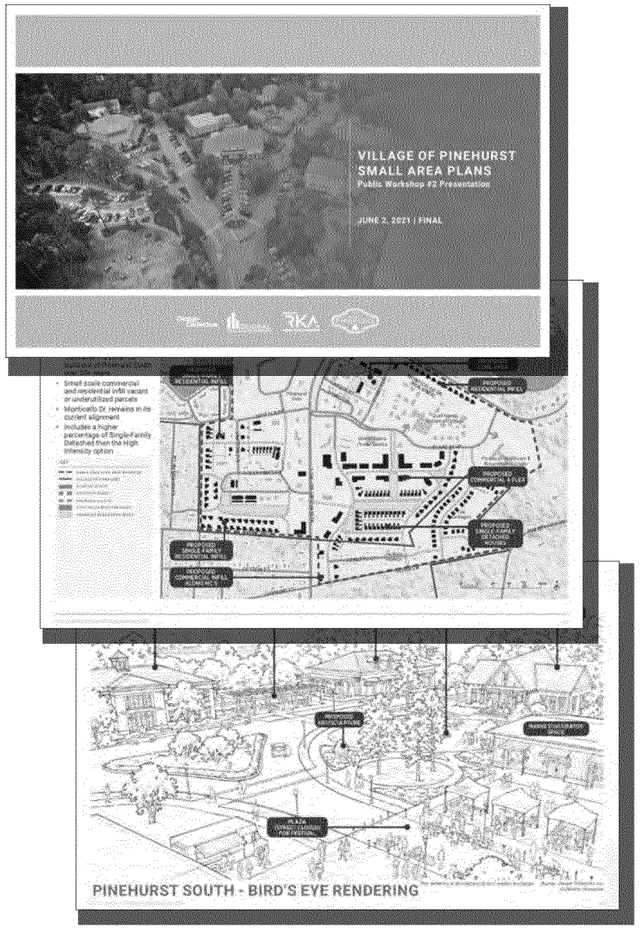
Overview

In Phase 2, from March to May 2021, based on the analysis conducted and feedback received during Phase 1, the consultant team designed and compiled Concept Plan Options, Street Sections, Open Space and Street Network Plan Diagrams, Renderings, Precedent Images, and similar for Village Place and Pinehurst South. During this time frame, the consultant team discussed the two plan areas and concepts with Village staff, appointed and/or elected officials, and key stakeholders and, based on input received, refined the concepts.

In early June 2021, the consultant team and Village of Pinehurst held Public Workshop 2 (of 3) to solicit further feedback on the proposed concepts for the two Small Area Plans. There were 88 registrants (including consultant and Village staff team members) and approximately 59 attendees participated virtually, due to COVID-19 precautions. Cecily Bedwell and MacKenzie Twardus (DCI) presented the Project Overview, Public Workshop 1 Summary, two plan options for each Small Area Plan, and other supporting materials. Melina Duggal (DREA) presented the Market and Economic Analysis summary that contributed to the plan options.

Breakout Rooms were utilized to give participants the opportunity to ask questions, give input, and listen to other stakeholders. Each breakout room was facilitated by a member of the project team. Materials were then posted to the project website to allow for further input.

The following pages summarize the feedback received during Public Workshop 2.

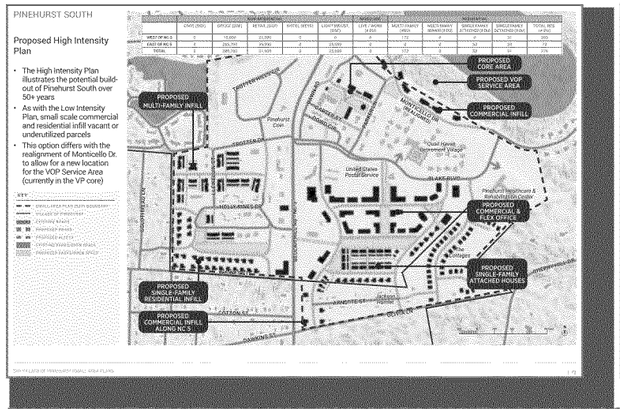


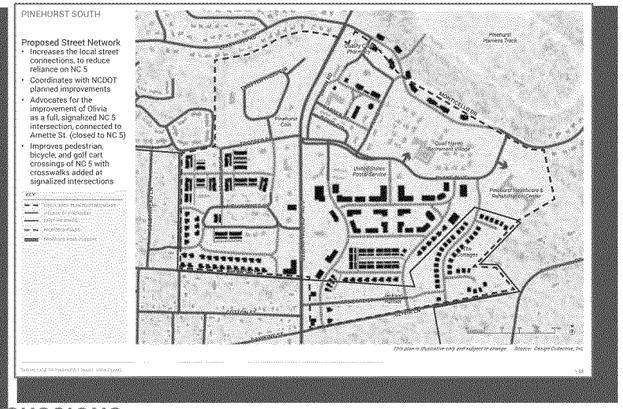


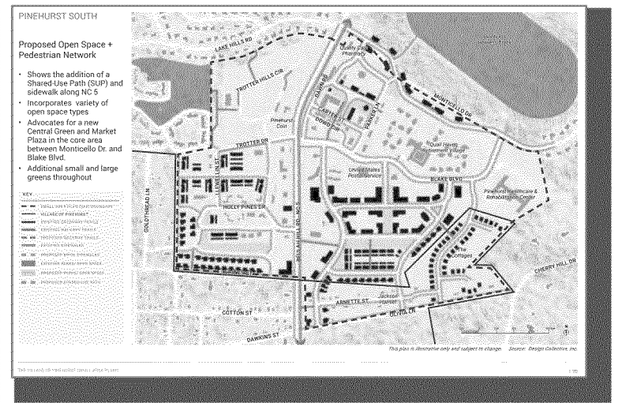
Screenshot images from Virtual Public Workshop 2

Public Workshop 2 Summary

Public Workshop 2 offered the community an opportunity to voice their observations and concerns about the future of Village Place and Pinehurst South. The list below is a compilation of the comments received during the workshop for Pinehurst South, as well as additional comments received post workshop, via the project website survey (see www.engage.vopnc.org/smallareaplans for more information).







PINEHURST SOUTH PLANS FOR BREAKOUT ROOM DISCUSSIONS

The pages above are examples plans shown during the Breakout Rooms for Pinehurst South. For a full reference of these comments, please see the PW 2 Summary document on the project website.

Low and High Intensity Plans

» Many stakeholders support the High Intensity Plan – although it is long term, it creates a good vision for this area.
  - VOP is running out of room so this area is critical to future development. More Multi-Family is needed here.
  - Prefer the idea of moving density here than taking Natural Areas and Green Spaces elsewhere

» However, some stakeholders prefer the Low Intensity Plan and Single-Family units as more in keeping with the Village of Pinehurst (VOP) theme.
  - Desire to make Single-Family lots larger to accommodate backyards and focus on low density with no Multi-Family
  - Some stakeholders are afraid that the High Intensity Plan would bring more traffic and add to the existing traffic problems. There is support for internal streets, but stakeholders do not believe this helps to alleviate traffic on NC-5 in the near term.

» Some stakeholders are in favor of Mixed Use. Mixed used and commercial buildings should still maintain appropriate heights, keeping VOP character.

» Many are against big box stores in the area, preferring smaller, locally-owned businesses

» Support for the Market/Incubator space for small businesses (proposed in the core, north of Blake Blvd.)

» Some stakeholders prefer research/medical businesses here (per Comp. Plan), believing those uses don't generate much traffic

» Concerns about the type of commercial development; needs to be thoughtful.

» Opposition to industrial use near residential area

» Some stakeholders think residential use on east side of NC-5 should be Multi-Family, not Single-Family Detached, as that area was meant to be commercial, Innovation Hub anchor.

» Moving the Pinehurst Public Service Facility from Village Place to Pinehurst South was a surprised to some stakeholders. Many agree that it needs to move, but think that there needs to be a better description of what it is and how will it look. There is also some concern that there may not be enough space for the Service Area.

» Pinehurst South's design should reflect / fit with VOP theme; it should not imitate Village Center, but the design should relate.

Transportation / Circulation

» Sidewalks / Paths:
  - Some think brick sidewalks should be required
  - Walkability is key to growth. Currently nowhere to go
  - Overall support for pedestrian connections and walkability
  - There is an opportunity to connect to Harness Track and Clubhouse by foot.
  - Support for the shared-use path along NC-5 - it would be good to connect it north, to Village Center
  - The residents of the Jackson Hamlet community travel on foot - adding sidewalks/walkability helps underserved community.
  - There should be a shared-use path going west to Lake Hills Road.
  - Focus has been switched from innovation hub to health and wellness; plan needs to reflect this change - more trails to walk or ride.
  - Plan needs to encourage walking to services and increase walkability to ease traffic on NC-5

» Streets
  - Most stakeholders in support of Monticello realignment and relocation of Service Facility here. However, some noted that the Service Facility would fit without relocating Monticello if no commercial was located on the north side.
  - Emphasize connectivity to the Harness Track; this is an asset to the community and it can be enhanced by this adjacent development.
  - There are still many concerns about NC-5 traffic. Some stakeholders do not think this plan helps the traffic problem.
  - Some stakeholders expressed concern that existing parallel parking (in Southern Pines) isn't working well because residents do not like parallel parking
  - Stakeholders are concerned about truck traffic on Monticello, depending on what type of commercial development will be in the area. They would like to know what kind of vehicles would be coming in and out.
  - Community supports the idea of rerouting commercial traffic off NC-5.
  - Concern about street ownership.
  - Some stakeholders think the Railroad should be diverted to bypass all of Pinehurst, altogether. This area could be used to make a greenway to accommodate golf carts from Aberdeen to Pinehurst.
  - Open up area around USGA headquarters - multi modal movement from Aberdeen to Pinehurst - almost to Southern Pines area - connect three small towns
  - Like that this plan would alleviate traffic on local streets
  - Plan looks appropriately Olmstedian in street pattern

Buildings:

» Preference for commercial/retail along the green space to encourage public use and engagement.

» Stakeholders would like to see a cohesion of architecture and landscape to blend everything together. FBC will be important.
  - Buildings (especially Multifamily, Mixed Used, and Commercial) need to have lots of open space, and breathing room around them, to avoid looking out of place.
  - Some stakeholders did not like the proposed 8-, 10-, 12-unit multi-family buildings

Open Space:

» Some stakeholders think that there is not enough open space in this plan.

» This is an entry corridor; it is important to have landscape and Village character here to reflect the theme of VOP. People should know they are entering VOP. Some stakeholders think that more landscape is needed in this area.

» Some stakeholders desire access to more sports fields, recreation areas for families in this area - possibly a sports campus with soccer, baseball, tennis, etc.

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4.0 RECOMMENDATIONS

4.1 OVERVIEW

4.2 GUIDING PRINCIPLES

4.3 CONCEPT DESIGN

4.4 FINAL DESIGN

Overview

The recommendations for Pinehurst South are broken down into three components: Guiding Principles, Concept Design, and Final Design. The material in this section takes into consideration the Phase 1 Existing Conditions analysis, the review of the previous plans and studies, and input received from stakeholders.

Approach

CHARACTER:

- Gateway at NC-5 & Blake Blvd. is important
- Architecture does not need to emulate the Village Center (VC), but should reflect the overall character of the Village
- New streets should reflect the curvilinear character of the Olmsted plan where practical, in response to topography, etc.
- 1-2 stories is preferred
- Jackson Hamlet: respect this historically Black neighborhood and its residents' history
- Explore ways to tie in the history of the Chalfonte Hotel and Ambassador 's Club, two historic buildings in this area that no longer exist

LAND USE:

- Explore placemaking/center east of NC-5, between Monticello Drive and Blake Blvd., given the nexus of the Post Office, Pharmacy, ABC, Dowd Cabin, and the new Girls & Boys Club
- Explore variety of residential types (including cottages, townhouses, live-work, and missing middle residential) as well as infill commercial
- Departure from 2019 Comp. Plan; the Innovation District is better suited to Focus Area 3: Medical District as it requires an anchor institution: medical, university, etc. Alternatively, this area could be anchored by the Golf Industry
- Incorporate new Open Spaces

TRANSPORTATION:

- Help alleviate traffic congestion on NC-5 by providing network/expanding connectivity
- Explore "Rails with trails" Shared-Use Path (SUP) east of NC-5, between roadway and rail (no golf carts)
- Coordinate with NCDOT sidewalk and roadway improvements along the west side of NC-5
- Study golf cart connections (west to east) and NC-5 and railway crossings (2 existing)

Guiding Principles

The Guiding Principles below informed the Concept and Final Designs found within this document and should carry through in future development and improvements within Pinehurst South. These defining planning principles help creating lively, walkable, desirable, and cohesive neighborhoods. The Guiding Principles employed for this planning effort are separated into universal Planning Principles and specific Olmsted and Manning Principles as follows.

PLANNING PRINCIPLES:

- Create a connected circulation network
- Incorporate Complete Streets
- Strengthen building frontage
- Provide a variety of public open spaces
- Design streets for flexible programming
- Promote health and wellness through neighborhood design

OLMSTED & MANNING PRINCIPLES:

- Design curvilinear street forms, following topography and continuously redirecting views
- Incorporate triangular parks at curvilinear street intersections
- Create an organic grid with short, walkable blocks (no cul-de-sacs)
- Maintain consistent building setbacks (except for civic uses)
- Encourage tree-lined streets
- Organic landscape design in Open Spaces

Concept Design

Following the Public Outreach engagement and the Guiding Principles research, the consultant team began a concept design process to explore options for development in Pinehurst South. The purpose of this phase (Phase 2) was to explore options for the Pinehurst South Small Area Plan and elicit feedback from Village staff and representatives as well as stakeholders. The Concept Design was presented as part of Public Workshop 2. The feedback on these designs was critical to generating the Final Design, which can be found in *Section 4.4* of this document.

Final Design

The Final Design (i.e., the preferred design solution) is a combination of text, perspective renderings, framework plans, streetscapes, and a potential build-out plan and absorption plan that represent the culmination of the feedback received through the project's Public Outreach process as well as the insight achieved from the existing conditions analysis, best practice and precedent research, and the concept design studies. The Final Design includes recommendations for planning and transportation elements throughout Pinehurst South. The Final Plan and its accompanying recommendations encompass the entire plan area and consider its surroundings and broader context. The Final Design helps to create an interconnected and coordinated approach for recommendations and inform the design the Detail Plan.

For Pinehurst South, two Build-out Plan Scenarios are shown due to the desire for flexibility. Build-out Plan - Scenario 1 shows a plan with a higher intensity program, including Single-Family Attached (SFA) residential east of NC-5, while Build-out Plan - Scenario 2 shows a plan with a lower intensity program, incorporating more Single-Family Detached (SFD) residential.



Village Center streetscape depicting the curving streets and irregular groupings of evergreen and deciduous planting that are the hallmark of the original Olmsted & Manning vision for Pinehurst
Source: Design Collective

Form-Based Code (FBC)

The Form-Based Code (FBC) is a companion document to this Small Area Plan (SAP) report. While this document focuses on the existing conditions analysis, best practice and precedent research, Concept Design studies, the Final Design plan and recommendations, as well as stakeholder feedback, it should be seen as an account of the planning process and the intent and vision established collectively. The FBC, on the other hand, is a regulating document, taking the intent and vision established through this planning process and formulating precise development standards that help ensure the vision becomes reality. Property owners, whether from the public or private sector, and their design teams will be required to follow the criteria laid out in the FBC when designing and submitting their intended development or improvement. The Village will use the FBC to review submissions, to ensure they are in compliance.

Planning Principles

The universal Guiding Principles below identify overarching design strategies for achieving an engaging, successful, and sustainable built environment. Additionally, on the following pages, the Olmsted and Manning Principles are design strategies specific to the historic design of the Village of Pinehurst which should be preserved and emulated in Pinehurst South. These principles have been identified as essential strategies for improving Pinehurst South and should be used to guide zoning modifications, streetscape and transportation improvements, and new development throughout the area.

1. CREATE A CONNECTED CIRCULATION NETWORK

» Provides greater accessibility through more direct routes, compared to a branching system

» Increases overall network efficiency and reliability through added redundancy

» Improves multi-modal transportation and encourages walking and bicycling

» Improves safety and public health

» Improve and expand golf cart accessibility

2. INCORPORATE COMPLETE STREETS STRATEGIES

» Incorporate bicycle and pedestrian facilities (e.g., accessible, passable sidewalks; curb ramps; bike racks; dark sky compliant, LED lighting; etc.)

» Integrate innovative stormwater management

» Improve the existing streetscapes to promote safe, comfortable, and convenient access for all users

» Require new development to design and improve streets to meet the Complete Streets principles and enhance and expand the pedestrian, bicycle, golf cart, and vehicular networks

3. STRENGTHEN BUILDING FRONTAGE

» Define Frontage with Street Trees and Buildings

» Relegate parking to side or rear

» Encourage infill development that respects traditional frontage patterns, with buildings lining streets

» Locate building entrances along primary streets and provide easy access and wayfinding for all users

» Require new development in the core area to have buildings with active ground-floor uses along primary streets to create engaging streetscapes

4. PROVIDE A VARIETY OF PUBLIC OPEN SPACES

» Incorporate a variety of passive and active open spaces to serve a broad base of users

» Promote an active lifestyle at all stages, by providing family-friendly outdoor activities and integrated accessible features and facilities

» Distribute open spaces to encourage daily use and access by walking and bicycling

» Require new development to provide a variety of appropriately-scaled open spaces and provide connections to the trail network. For proper village-scaled development, open space should equate to approximately 8% of the developable land area.

5. DESIGN STREETS FOR FLEXIBLE PROGRAMMING

» Streets in core locations should be flexible and adaptable

» Able to carry pedestrians, bicycles, and vehicles on the typical day

» But on event days, or in unique circumstances like the pandemic, be able to close to vehicular traffic to host festivals, in-street dining, provide additional open space, etc.

» Explore parking ratio reductions

6. PROMOTE HEALTH AND WELLNESS THROUGH NEIGHBORHOOD DESIGN

» Connect people with health, fitness, and wellness through daily engagement and activity

» Create places to Live-Work-Play-Eat-Shop in an enriched natural setting that promotes healthy lifestyles

» Promote walkable, mixed-use neighborhoods, lessening dependence on vehicles

» Celebrate Pinehurst's founding as a health resort village



1. CREATE A CONNECTED NETWORK



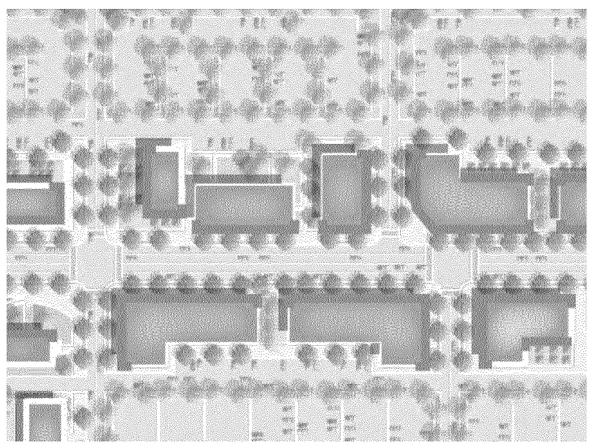
4. PROVIDE A VARIETY OF PUBLIC OPEN SPACES



2. INCORPORATE COMPLETE STREETS STRATEGIES



5. DESIGN STREETS FOR FLEXIBLE PROGRAMMING



3. STRENGTHEN BUILDING FRONTAGE

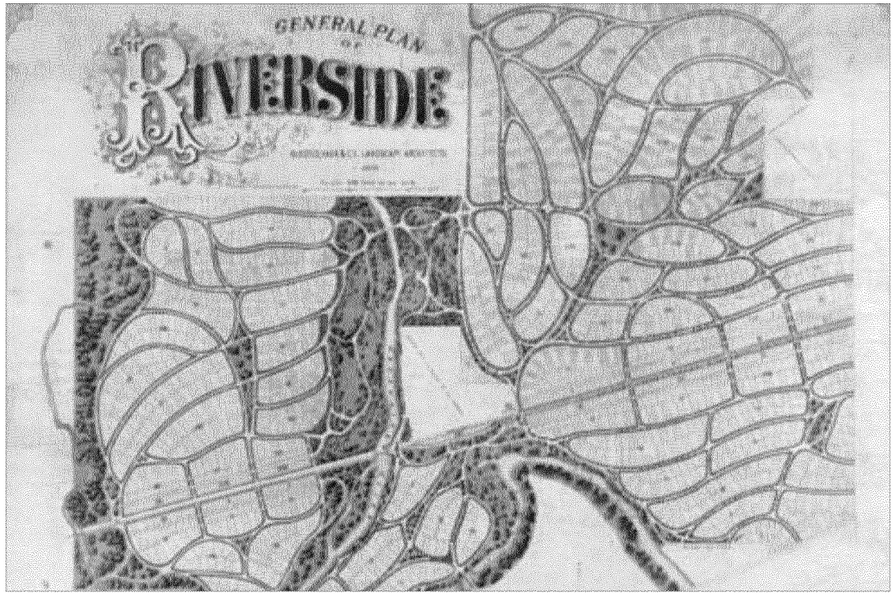


6. PROMOTE HEALTH AND WELLNESS ENVIRONMENTS

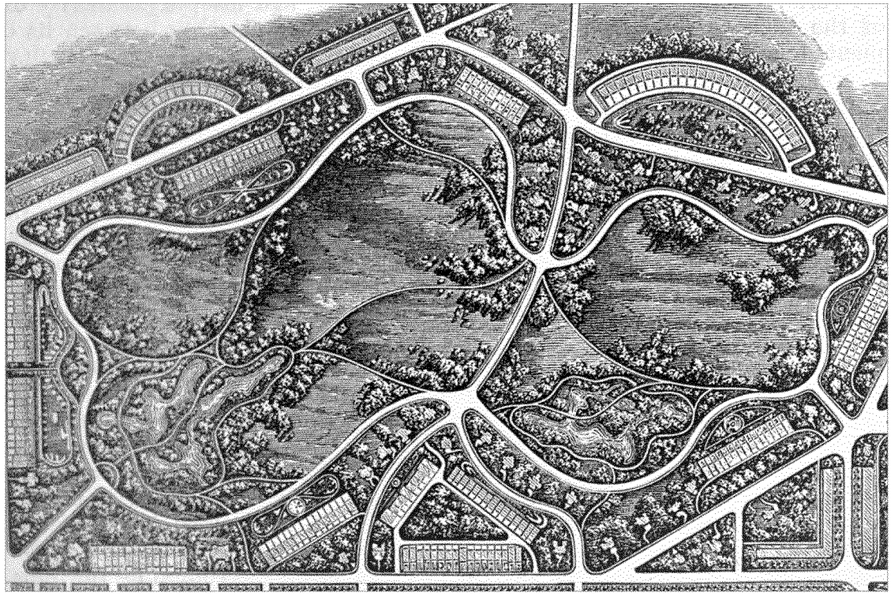
Olmsted Planning Principles

In 1895, James Walker Tufts hired the landscape architecture firm Olmsted, Olmsted, and Eliot to design the Village of Pinehurst as a health-centered resort. Known as the "Founder of American Landscape Architecture", Frederick Law Olmsted brought his design philosophy and planning principles to bear on Pinehurst - an approach that can be seen in many of his designs for towns, cities, and parks. These "Olmstedian" Principles include the following design strategies:

- Design curvilinear street forms, following topography and continuously redirecting views
- Incorporate triangular parks at curvilinear street intersections
- Create an organic grid with short, walkable blocks (no cul-de-sacs)
- Maintain consistent building setbacks (except for Civic uses)
- Encourage tree-lined streets, typically with regularly-spaced shade trees
- Organic landscape design in Open Spaces



Olmsted Plan: Riverside, IL
Credit: Enjoy Illinois



Olmsted Plan: Birkenhead Park - United Kingdom
Credit: The American Cyclopedia v. 13, 1879



Olmsted Plan: Vandergrift - Westmoreland Co, PA
Credit: Alamy Stock Photo

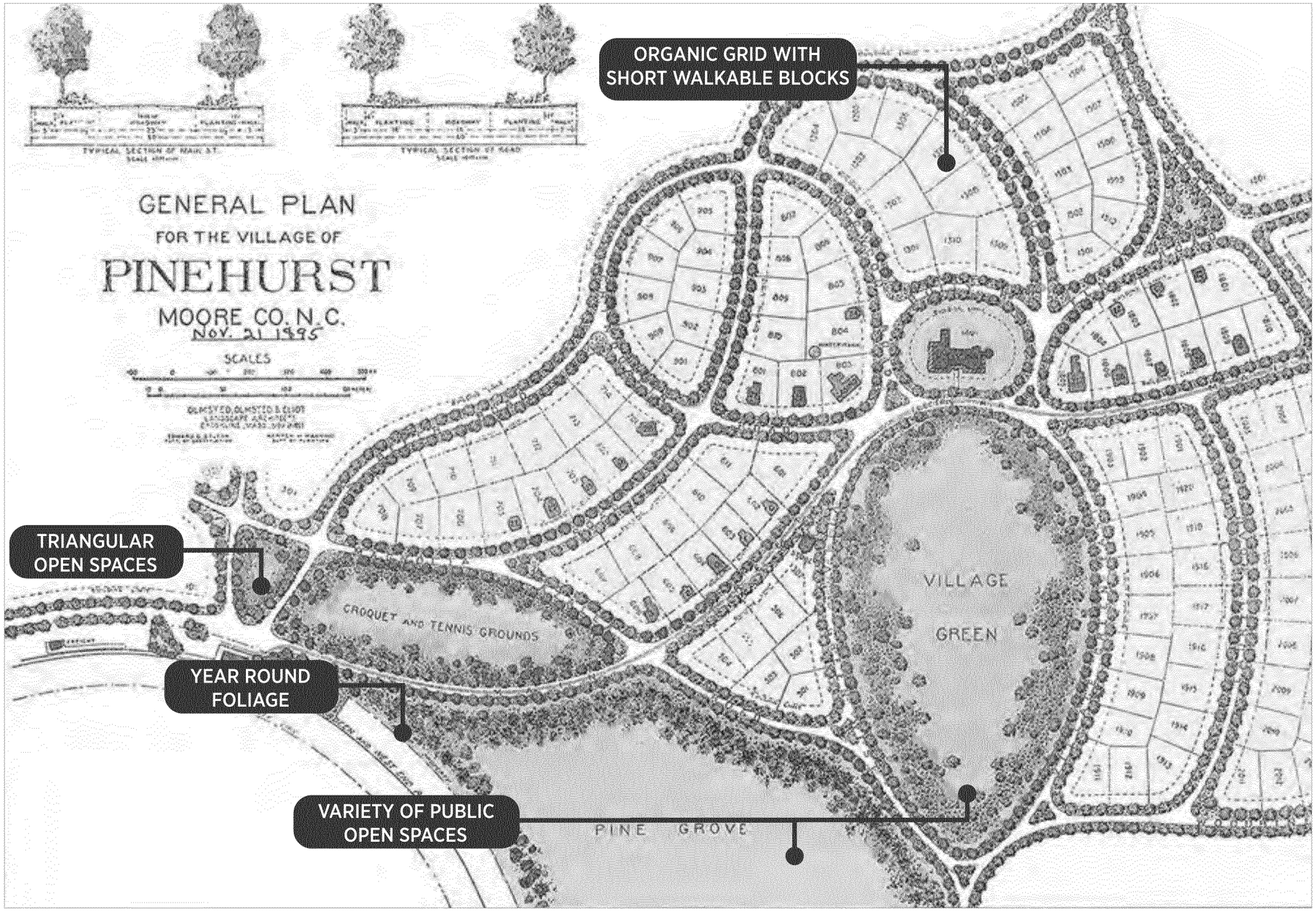


Olmsted Plan: Sherwood - Richmond, VA
Credit: National Park Service/Sherwood Land Co.

Olmsted and Manning Principles and the Village

The General Plan for the Village of Pinehurst, shown to the right, exhibits many of the iconic "Olmstedian" characteristics of design. However, Olmsted's assistant Warren H. Manning also uniquely influenced the vision and execution of the plan, carrying out most of the major landscape design work and implementation. To view more detail, see the *Pinehurst National Historic Landmark Nomination Registration Form*.

- Design curvilinear street forms, providing a more relaxed approach to "getting there"
- Create an effect of a park-like oasis
- Encourage the use of native plants, primarily evergreens and plants with winter interest, to create a year-round green village. To note, while the plan to the right depicts a regular, linear spacing of deciduous street trees, the built landscape of Village Center represents an organic approach with irregular groupings of odd-numbered, mixed evergreen and deciduous plantings along the street edge)
- Accommodate new patrons and winter residents by providing additional recreational venues (this later became a focus on the golf industry with designer Donald James Ross)





Village Center
Credit: Village of Pinehurst

Overview

Following the Public Outreach and Guiding Principles research, the consultant team led a Concept Design process to explore options for development in Pinehurst South. The purpose of the Concept Design phase (Phase 2) was to explore options for the Pinehurst South Small Area Plan and elicit feedback from stakeholders and continued input from Village staff and representatives. The following pages outline images, diagrams, and plan options that were developed and presented as a part of Public Workshop 2. The feedback on these concept designs and images was critical to generating the Final Design, which can be found in *Section 4.4* of this document.

The images to the right show stakeholder preference feedback received in Public Workshop 2 Breakout Room Discussions. The images were shown as precedents for the architecture, streetscapes, parking, and parks/open spaces of Pinehurst South. Participants were encouraged to respond "like" (with green dots) or "dislike" (with red dots) to each photo; the numbers within the green and red dots indicate the number of stakeholder responses.



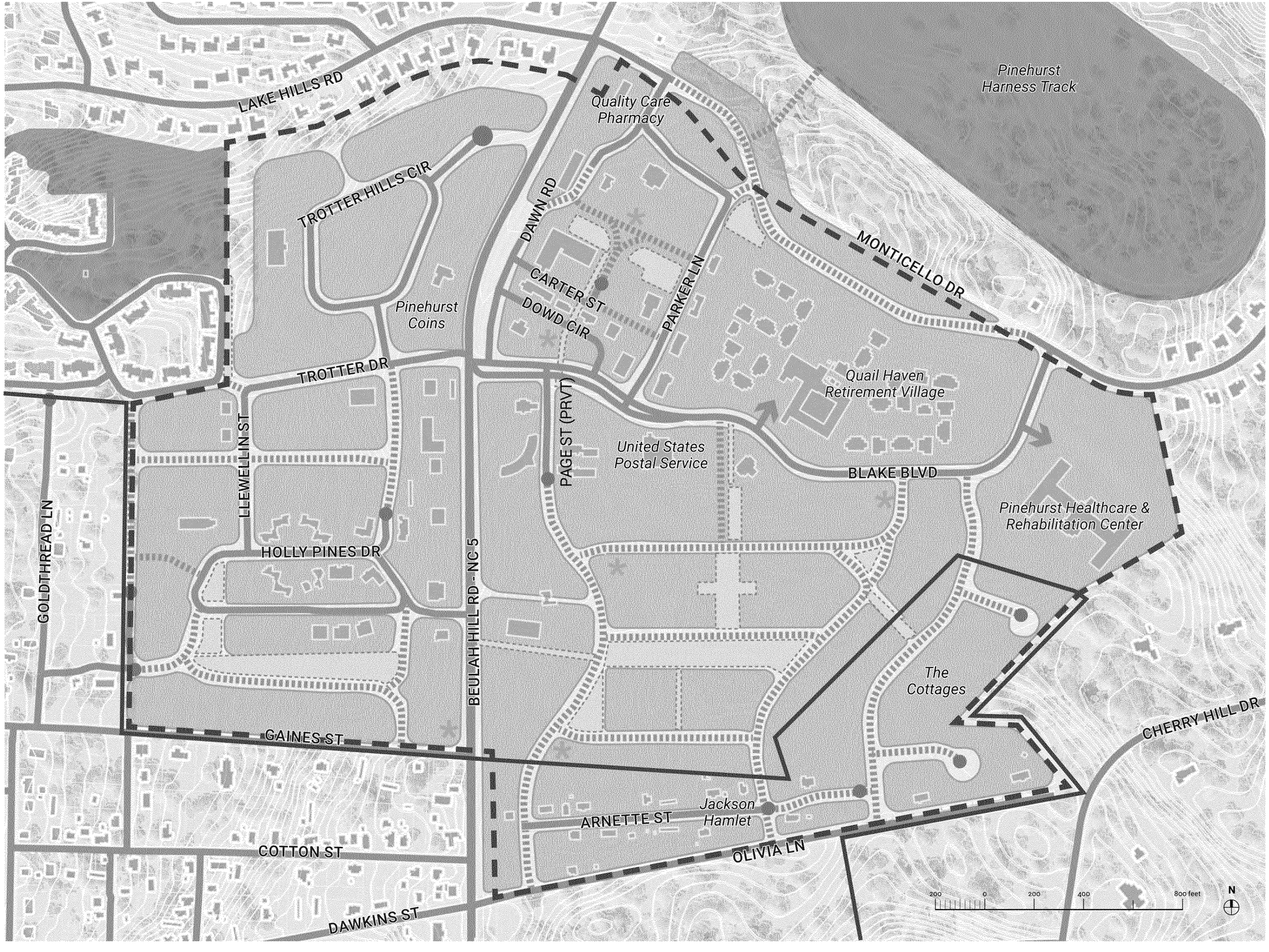
PUBLIC INPUT RECEIVED BASED ON BREAKOUT ROOM DISCUSSIONS

The feedback above is a summary of all Breakout Rooms. Participants were encouraged to respond to "like" (green) or "dislike" (red) for each photo.

Parti/Block Diagram

The Parti/Block Diagram was presented as part of Public Workshop 2. The purpose of this plan was to elicit feedback and conversation about development patterns and circulation in Pinehurst South. This plan should be considered a preliminary concept study and not the final recommended plan. To see the Final Plan (preferred design solution), please see *Section 4.4* of this document.

- The Parti diagram illustrates the Approach in plan form
- The diagram shows the proposed addition of new streets, forming new blocks and creating a more connected street network



KEY

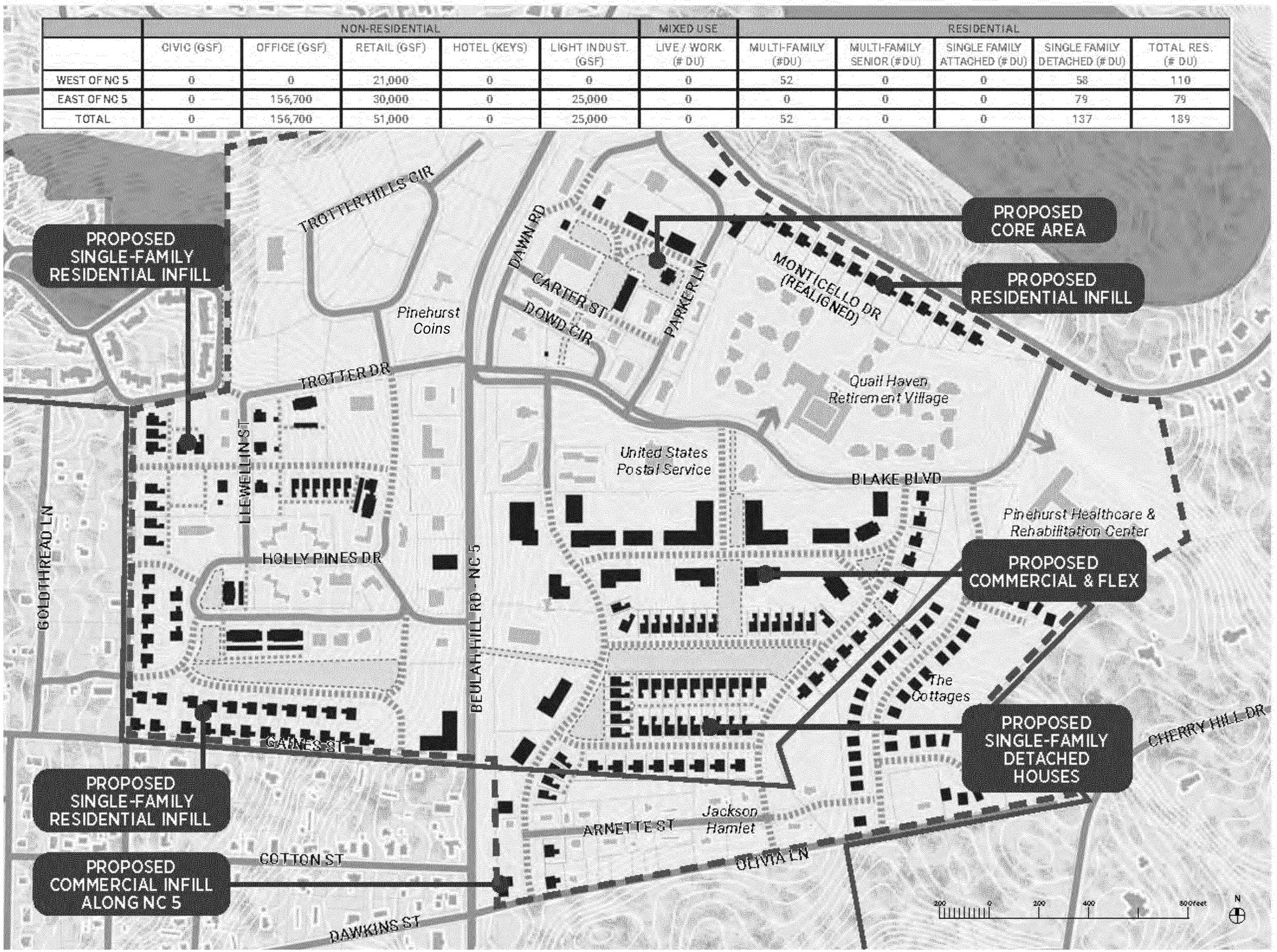
- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING ROADS
- PROPOSED ROADS
- EXISTING DEAD END
- EXISTING PARKS/ OPEN SPACE
- PROPOSED PARKS/ OPEN SPACE
- PROPOSED BLOCKS
- PROPOSED PROMINENT BUILDING LOCATION

Concept Design
Low Intensity Plan Option

The Low Intensity Plan Option was presented as part of Public Workshop 2. The purpose of this plan was to test opportunity sites; see what building and parking configurations might fit on parcels; and elicit feedback and conversation about development patterns and intensity of new infill. This plan should be considered a preliminary concept study and not the final recommended plan. To see the Final Plan (i.e., the preferred design solution), please see *Section 4.4* of this document.

- The Low Intensity Plan illustrates the potential build-out of Pinehurst South over 30+ years. This plan includes a higher percentage of Single-Family Detached units
- Small scale commercial and residential infill vacant or under-utilized parcels
- Monticello Dr remains in its current alignment

	NON-RESIDENTIAL					MIXED USE	RESIDENTIAL				
	CIVIC (GSF)	OFFICE (GSF)	RETAIL (GSF)	HOTEL (KEYS)	LIGHT INDUST. (GSF)	LIVE / WORK (# DU)	MULTI-FAMILY (#DU)	MULTI-FAMILY SENIOR (#DU)	SINGLE FAMILY ATTACHED (# DU)	SINGLE FAMILY DETACHED (# DU)	TOTAL RES. (# DU)
WEST OF NC 5	0	0	21,000	0	0	0	52	0	0	58	110
EAST OF NC 5	0	156,700	30,000	0	25,000	0	0	0	0	79	79
TOTAL	0	156,700	51,000	0	25,000	0	52	0	0	137	189



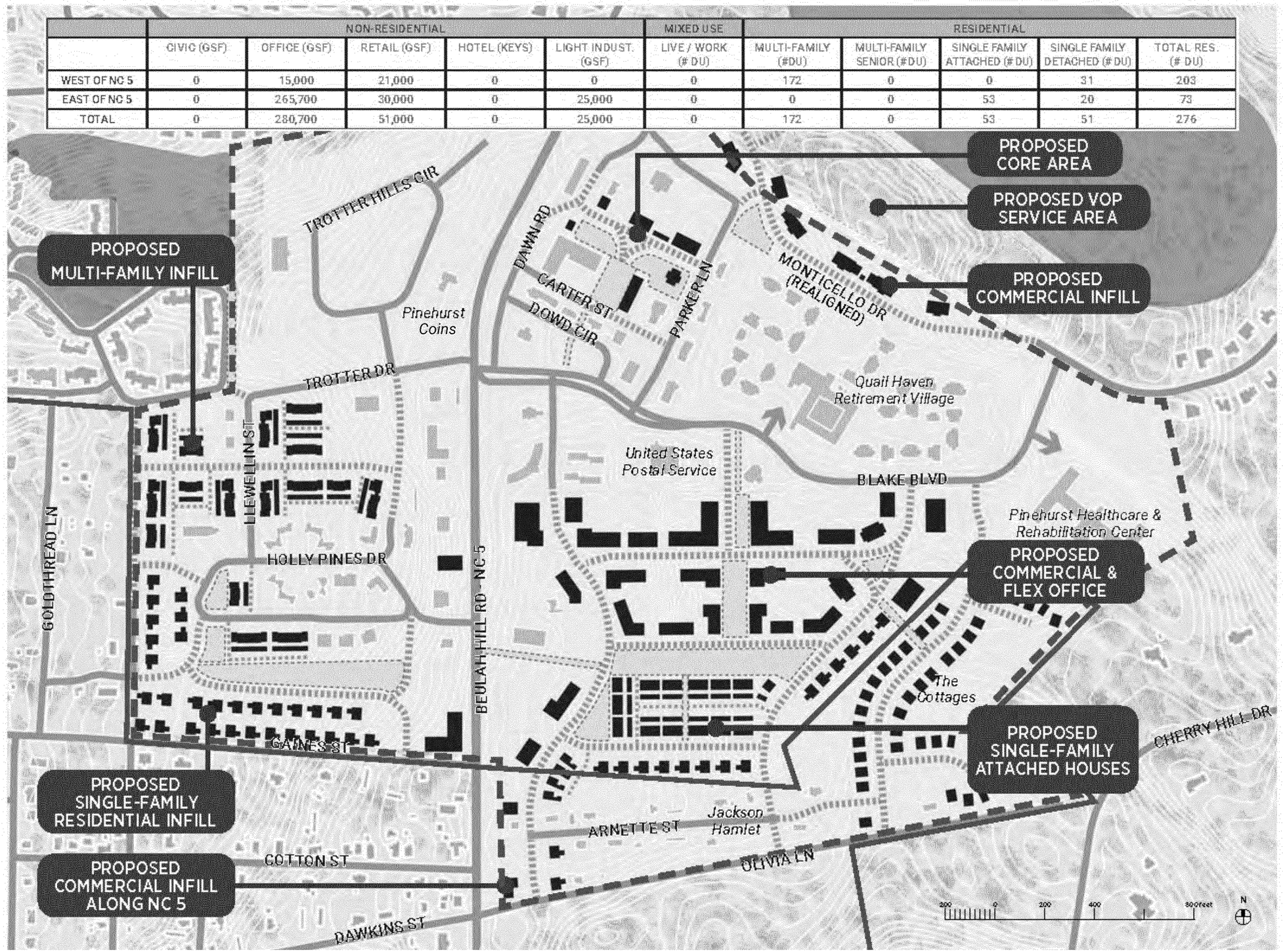
This plan is illustrative only and subject to change. Source: Design Collective, Inc.

Concept Design
High Intensity Plan Option

The High Intensity Plan Option was presented as part of Public Workshop 2. Similar to the Low Intensity Plan, the purpose of this plan was to test opportunity sites; see what building and parking configurations might fit on parcels; and elicit feedback and conversation about development patterns and intensity of new infill. This plan should be considered a preliminary concept study and not the final recommended plan. To see the Final Plan (i.e., the preferred design solution), please *Section 4.4* of this document.

- The plan illustrates the potential build-out of Pinehurst South over 50+ years.
- This plan includes a higher percentage of Single-Family Attached and Multi-Family residential units
- As with the Low Intensity Plan, small scale commercial and residential infill vacant or under-utilized parcels
- Monticello Dr. is realigned to allow for a new location of the Village's Public Service Area to the north

	NON-RESIDENTIAL					MIXED USE	RESIDENTIAL				
	CIVIC (GSF)	OFFICE (GSF)	RETAIL (GSF)	HOTEL (KEYS)	LIGHT INDUST. (GSF)	LIVE / WORK (# DU)	MULTI-FAMILY (#DU)	MULTI-FAMILY SENIOR (#DU)	SINGLE FAMILY ATTACHED (# DU)	SINGLE FAMILY DETACHED (# DU)	TOTAL RES. (# DU)
WEST OF NC 5	0	15,000	21,000	0	0	0	172	0	0	31	203
EAST OF NC 5	0	265,700	30,000	0	25,000	0	0	0	53	20	73
TOTAL	0	280,700	51,000	0	25,000	0	172	0	53	51	276



This plan is illustrative only and subject to change. Source: Design Collective, Inc.

Overview

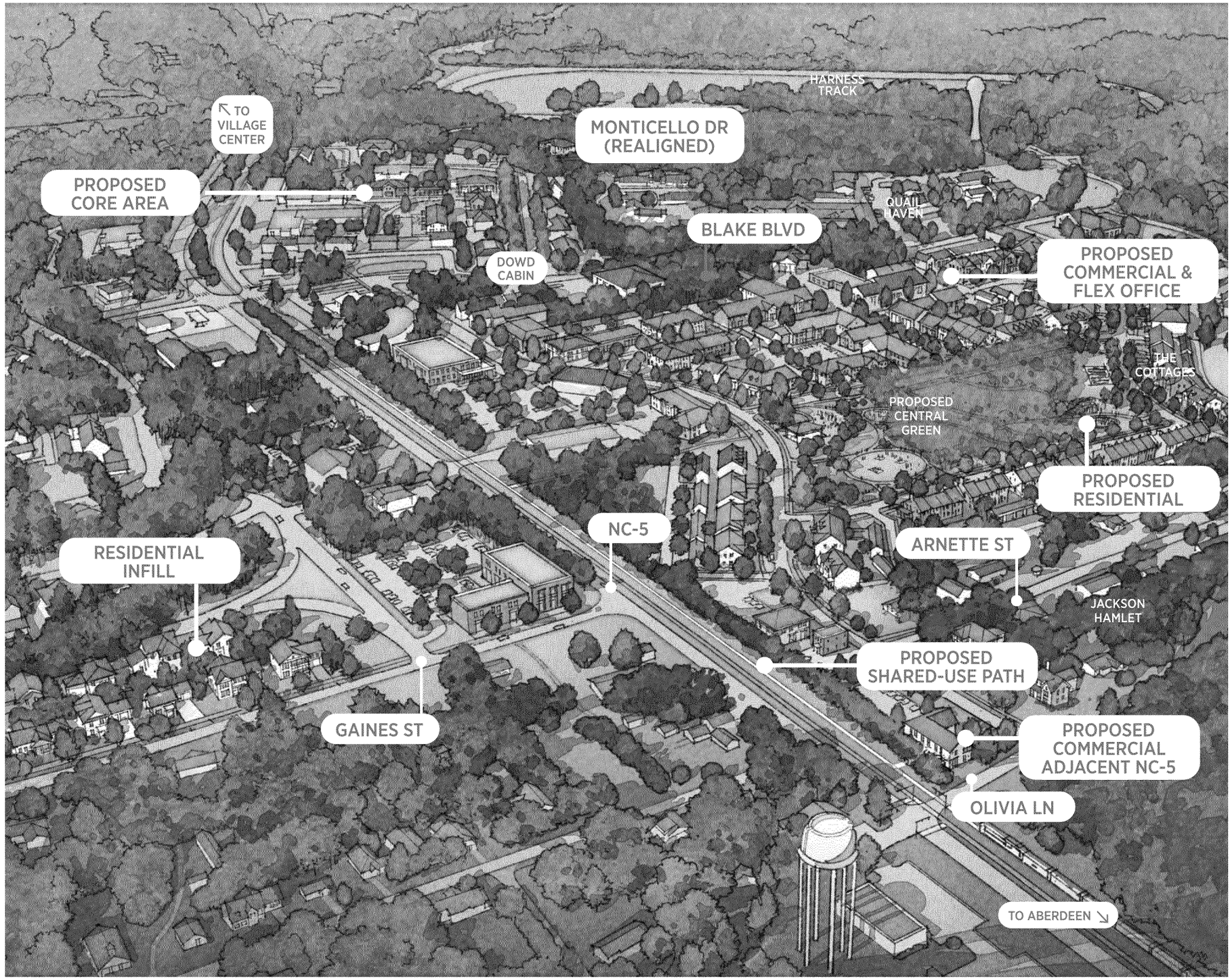
The Final Design comprises renderings, framework plans, and street sections that represent the culmination of the planning process and feedback heard through the project's Public Outreach efforts. It also incorporates the Guiding Principles, discussed in Section 4.2 of this document. The Final Design includes recommendations for land use and transportation throughout Pinehurst South and illustrates the intent of the vision through graphics and text. It is important to note that the plans and renderings herein are illustrative only; development will occur as individual property owners come forward with development plans. The Form-Based Code (FBC), a companion document to this report, is the regulatory document that will ensure development plans (whether by the private or public sector) abide by the recommendations of this *Pinehurst South Small Area Plan*.

The Aerial Rendering to the right demonstrates how Pinehurst South may appear at full build-out. The rendering shows the following:

- Infill commercial adjacent to NC-5 for visibility and access. New office and flex-building uses infill the area south of Blake Blvd.
- A large Central Green between Blake Boulevard and Arnette Street will provide ample opportunity for residents and commercial users of this neighborhood to enjoy outdoor activities that are both active and passive. See page 62 of this document for more detail on this open space.
- Residential infill to the south helps to transition from new development to the existing historically Black neighborhood of Jackson Hamlet
- Residential development west of NC-5.

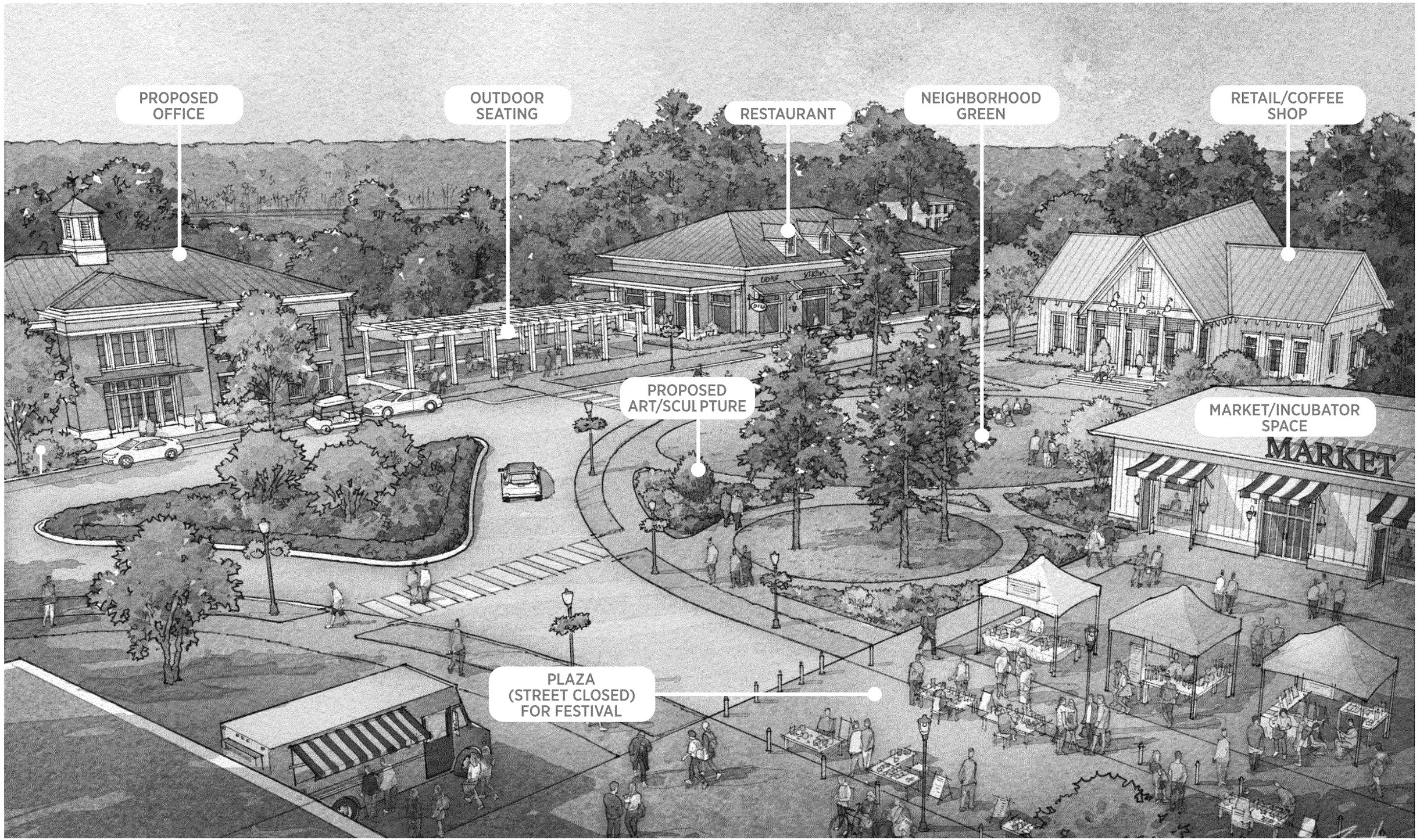
The Bird's Eye Rendering on the following page shows a conceptual view of the new core area between Monticello Drive and Blake Boulevard that will serve as a new destination for neighborhood retail and services, restaurants, an incubator space for new businesses and makerspace, and a plaza for markets and festivals.

The renderings are conceptual and represent one of many scenarios that could happen over the next 50+ years in Pinehurst South. Future development will depend on the interest of public and private property owners in developing or selling their property. The development will also be dependant on future changes to the market demand in the Village of Pinehurst.



PINEHURST SOUTH - AERIAL RENDERING

This rendering is illustrative only and subject to change. Source: Design Collective, Inc. & Zanetta Illustration



CORE AREA - BIRD'S EYE RENDERING

This rendering is illustrative only and subject to change. Source: Design Collective, Inc. & Zanetta Illustration

Core Area Detail Plan

The Detail Plan illustrates the potential build-out of the core area south of Monticello Dr. and north of Blake Blvd.

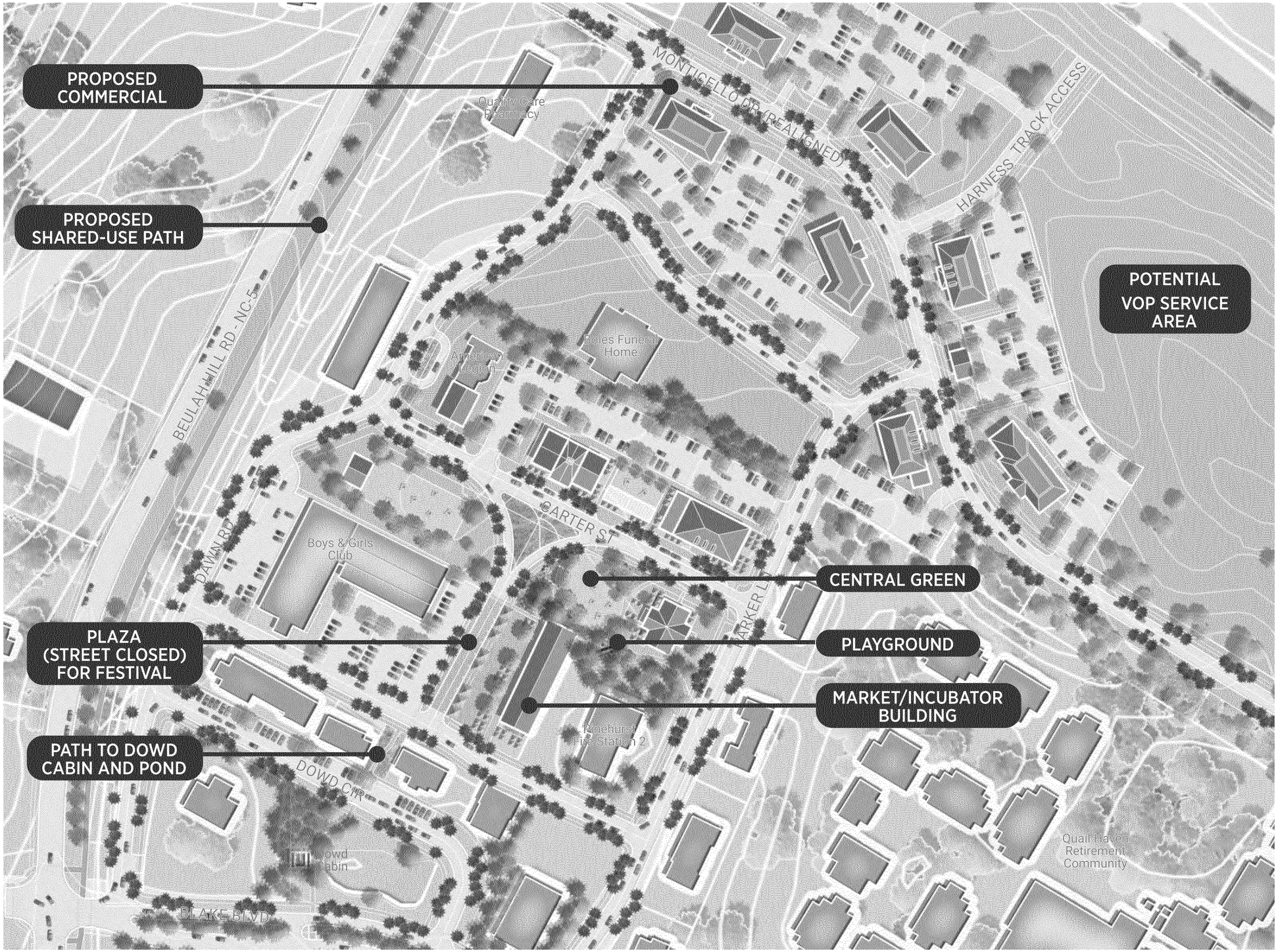
The development builds off the existing Post Office, Pharmacy, ABC, and Dowd Cabin as well as the planned Girls & Boys Club and National Association of Home Builders.

New open spaces include a Market Plaza, Central Green, playground, and path south to Dowd Cabin

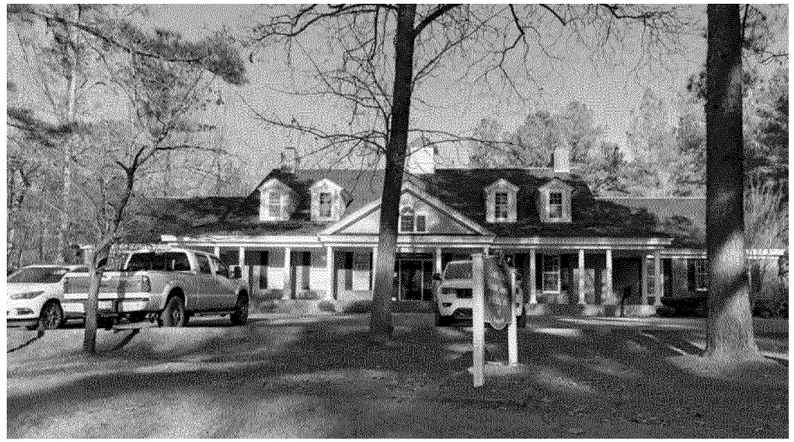
A new Central Green anchors the new development, serving as a gathering place for community events.

KEY

- EXISTING BUILDINGS
- PROPOSED BUILDINGS
- PROPOSED BUILDINGS



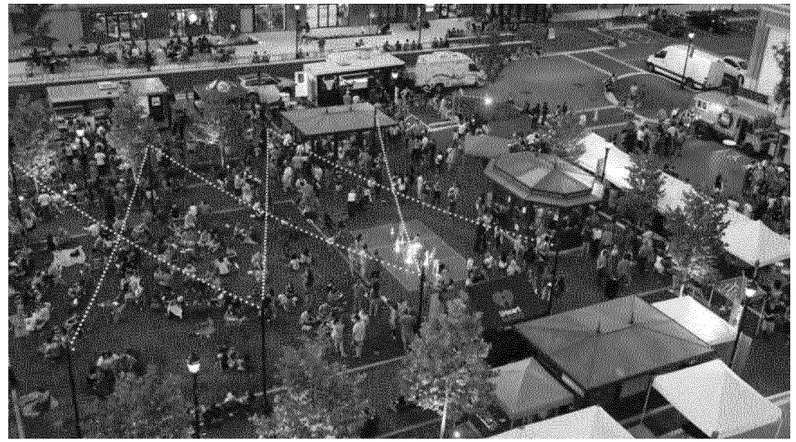
This plan is illustrative only and subject to change. Source: Design Collective, Inc.



Precedent - Office - Turnberry Wood
Credit: Design Collective



Precedent - Mixed Use - Mashpee Commons, MA
Credit: PCA Design



Precedent - Market Square - Baltimore, MD
Source: Design Collective



Precedent - Plaza - Summersville, SC
Credit: LaQuatra Bonci



Precedent - Playground - Portland, OR
Credit: Greenworks SPC



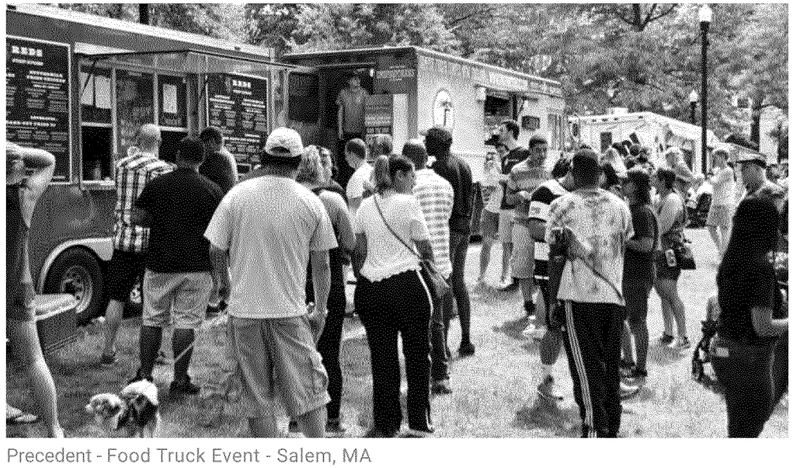
Precedent - North Village Market Pavilion, Prospect, Kentucky
Credit: Google Maps



Precedent - Small Retail Shop - Summersville, SC
Credit: CRBJ Bizwire



Precedent - Farmers Market - Atlanta, GA
Credit: Community Farmers Markets



Precedent - Food Truck Event - Salem, MA
Credit: North of Boston



Precedent - Streetscape - Pinehurst, NC
Source: Design Collective

Proposed Open Space + Pedestrian Network

The existing Pinehurst South plan area contains no dedicated public open space or trails within its boundary. The Pinehurst Harness Track lies just to the north.

All new development should add to the network, creating publicly-accessible greens, plazas, and trail connections to serve the surrounding office and residential uses.

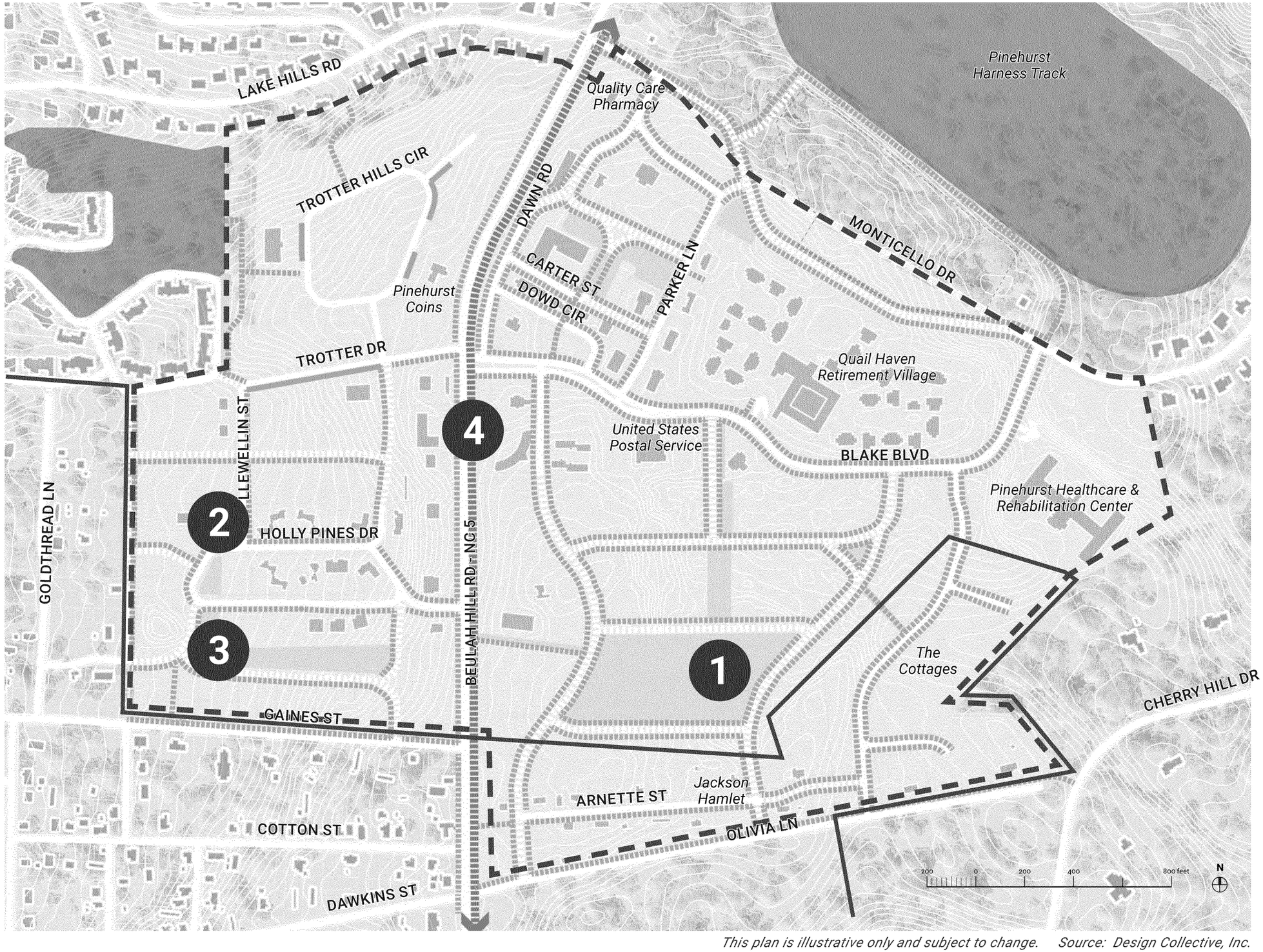
A Market Plaza is shown in the core area between Monticello Drive and Blake Blvd. and a new, large Central Green is shown to the south, east of NC-5.

A new Shared-Use Path (SUP) and sidewalk are shown along NC-5 and within the ACWR right-of-way.

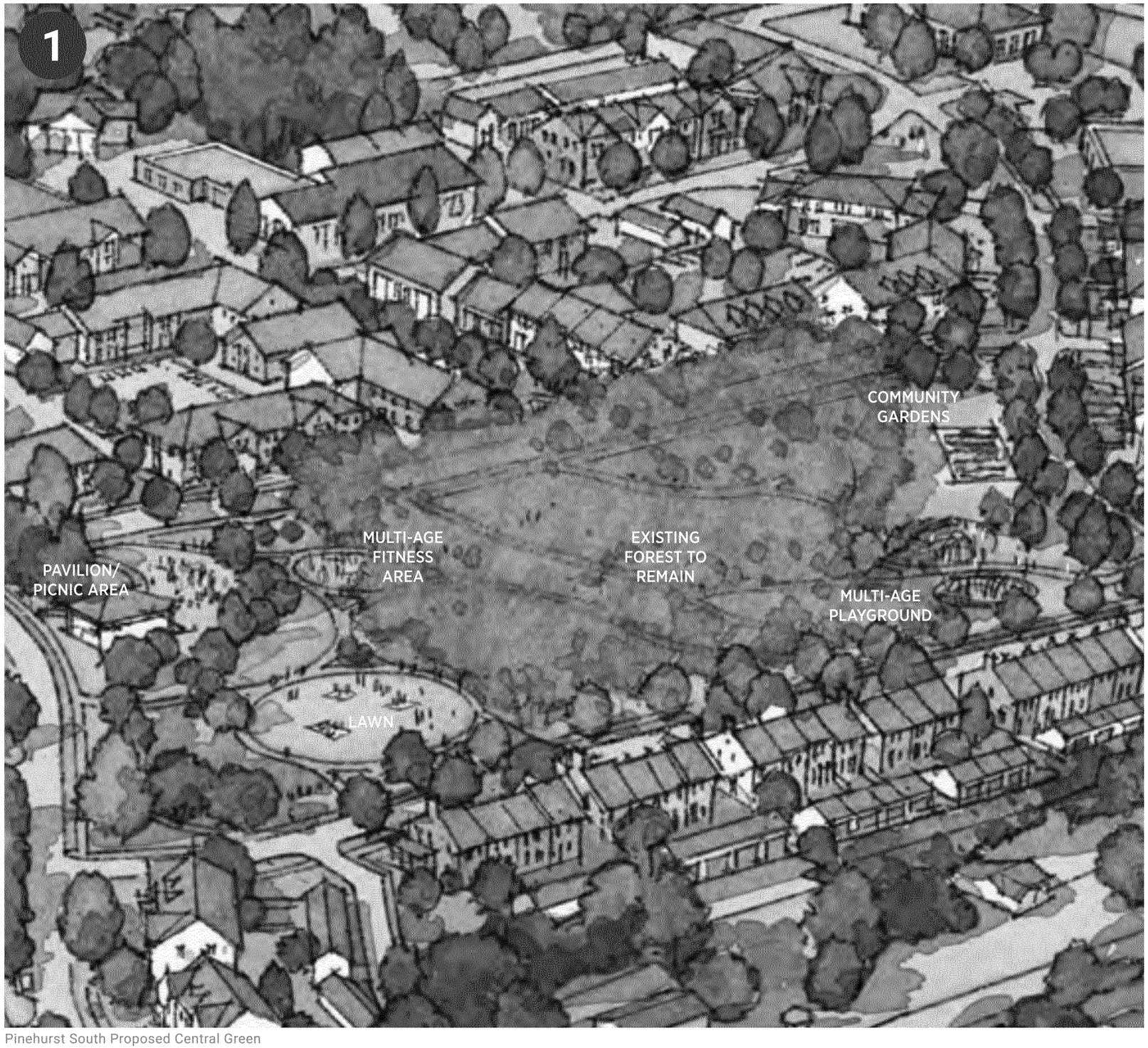
KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING SIDEWALKS
- PROPOSED SIDEWALKS*
- EXISTING PARKS/ OPEN SPACE
- PROPOSED PARKS/ OPEN SPACE
- PROPOSED SHARED-USE PATH

**Proposed sidewalks shall be brick in commercial areas*



This plan is illustrative only and subject to change. *Source: Design Collective, Inc.*



Pinehurst South Proposed Central Green
Source: Design Collective



Precedent - Attached Green - Maple Lawn, MD
Credit: Design Collective



Precedent - Attached, Linear Green - Maple Lawn, MD
Source: Design Collective



Precedent - Shared-Use Path
Source: Village of Pinehurst

Open Space Detail Plan

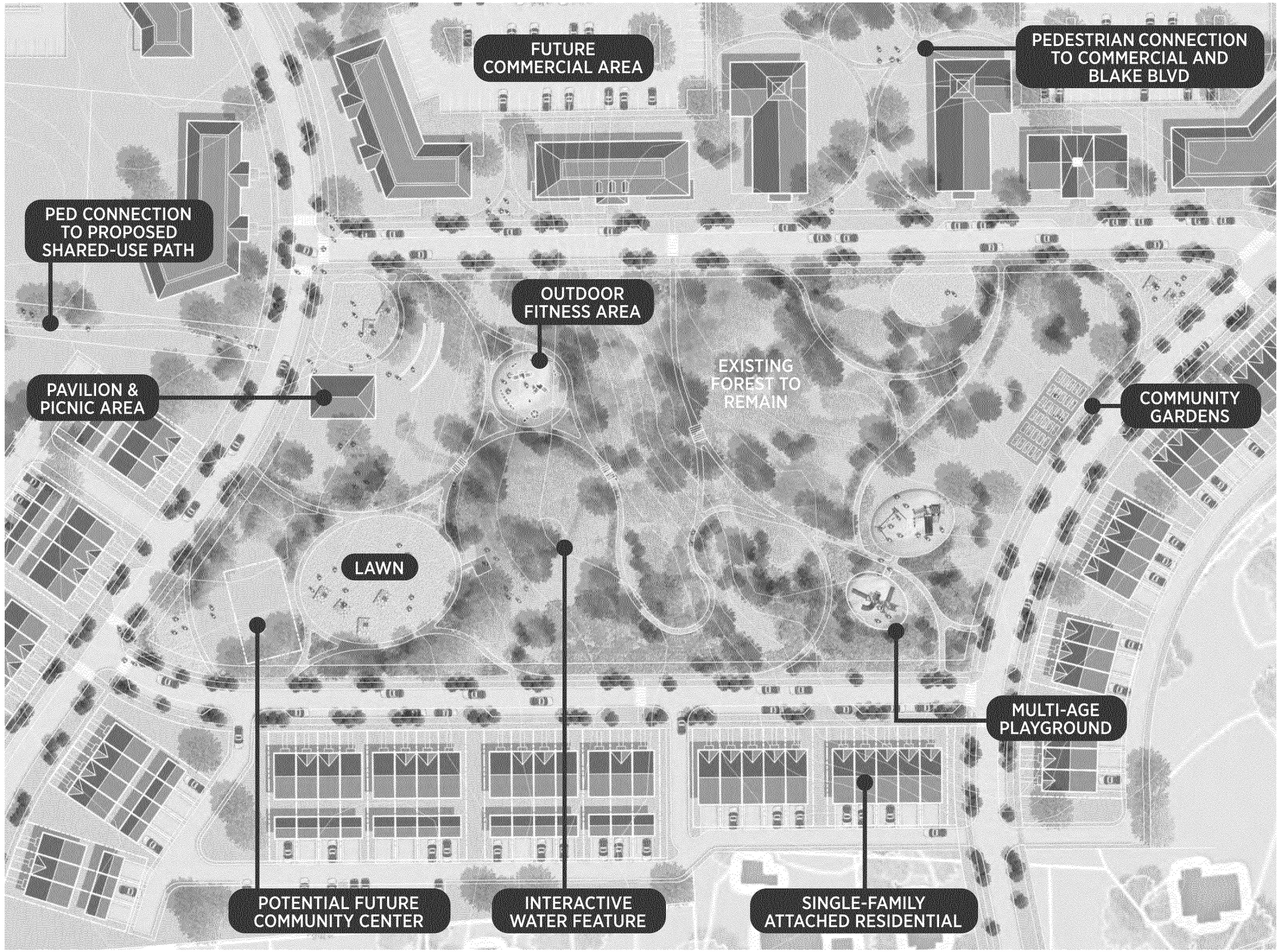
The Detail Plan illustrates a potential build-out of the area south of Blake Boulevard and north of Jackson Hamlet.

New mixed-use development surrounds a large Central Green that helps to preserve some of the existing topography and trees, This new open space serves both office tenants as well as neighborhood residents.

The new Central Green is shown with a pavilion, an interactive, meandering water feature fed by stormwater, community gardens, paths through a wooded area, disc golf, an exercise park, and a multi-age playground area. If desired, a community building could be built in the future in the lower southwest corner, where the historic Chalfonte Hotel used to stand.

KEY

- EXISTING BUILDINGS
- PROPOSED BUILDINGS
- PROPOSED BUILDINGS



This plan is illustrative only and subject to change. Source: Design Collective, Inc.



Precedent - Pavilion
Credit: Design Collective



Precedent - Community Garden
Source: Eiber Community Garden



Precedent - Intergenerational Fitness Park
Credit: Phil Bourne/Goric



Precedent - Playground
Source: Greenworks SPC



Precedent - Disc Golf
Credit: Reinhardt University

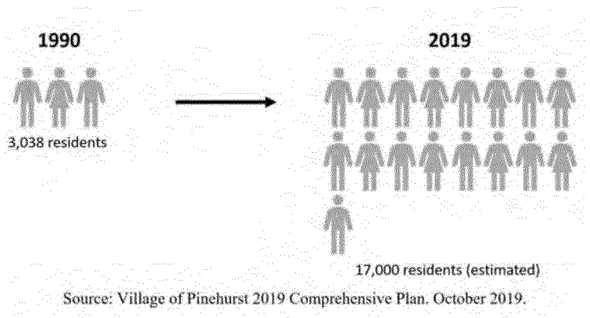


Precedent - Stormwater Management Water Feature
Credit: The Plant Hunter

Introduction

The Village of Pinehurst (Village) is a desirable community attracting new residents and businesses, and some Village residents are concerned about the impact of growth on the existing quality of life, particularly further vehicular traffic impacts.

In 2019, the Village of Pinehurst completed the "Envision the Village" community initiative to adopt the 2019 Comprehensive Plan. The 2019 Comprehensive Plan is an official guide for the future vision and policy framework for development in Pinehurst. The plan established five focus areas which represent the most important areas to influence, as development in these areas could have the most significant impact on shaping the future of Pinehurst. Two of the focus areas are being evaluated in deeper detail with this study: Village Place/Rattlesnake Trail Area and Pinehurst South/Highway 5 Commercial Area.



Source: Village of Pinehurst 2019 Comprehensive Plan. October 2019.

The Small Area Plan (SAP) effort recommends improvements to the Village Place/Rattlesnake Trail Area (hereafter referred to as Village Place) and Pinehurst South/Highway 5 Commercial Area (hereafter referred to as Pinehurst South) that will improve the transportation network while maintaining the future vision for the Village of Pinehurst. For Village Place, this study provides a plan to create a mixed-use, walkable area that connects Village Place/Rattlesnake Trail to the Village Center. For Pinehurst South, this study provides a plan to apply the planning principles of Tufts, Olmsted, and Manning to Pinehurst South while also providing connection to the Village Center via bicycle and pedestrian facilities to encourage reduced traffic on NC-5.

Pinehurst South

The following are the existing transportation conditions within the Pinehurst South/Highway 5 Commercial Area (hereafter referred to as Pinehurst South), projected traffic impacts of the proposed 50-year build-out development plan, planned transportation improvements along with recommended long-range transportation improvements. Recommendations apply the planning principles of Tufts, Olmsted, and Manning to Pinehurst South while also providing connection to the Village Center via bicycle and pedestrian facilities as well as support of long-range transportation plans which will provide an alternate route to NC-5.

Existing Transportation Infrastructure Conditions:

BEULAH HILL ROAD/HIGHWAY 5 (NC-5)

The dominant transportation feature in the Pinehurst South area is Beulah Hill Road/Highway 5 (NC-5). NC-5 is a major thoroughfare running north and south through the heart of the Village of Pinehurst, connecting NC 211 to the north with US 1 to the south through Aberdeen. The Aberdeen Carolina and Western Railway (ACWR) which runs parallel to NC-5, contributes to transportation access challenges, however; the ACWR is open to discussions about improvements within their right-of-way. Traffic congestion along NC-5 has long been a concern for the Village of Pinehurst community.

The NC-5 section running through the Pinehurst South study area is carrying over 20,000 vehicles per day (vpd) and operates as a class 2 arterial with a 35 MPH speed limit. Based on a planning level capacity analysis, NC-5 is operating at an average Level of Service (LOS) D during peak hours. Corridor Traffic Capacity is based on overall travel time/speed and is measured by levels of service ranging from LOS A (free-flowing, no delays) to LOS D (frequent stops and delays with overall travel speeds less than 10 MPH).

2020 PINEHURST NC 5 CORRIDOR TRAFFIC UPDATE

LEVEL OF SERVICE COMPARISON

Stop Sign Controlled Intersections - AM Peak Hour

	2005	2007	2009	2011	2013	2015	2018	2020
INTERSECTION	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*
NC 5 @ McDonald W/E	C-C	C-B	D-D	D-C	C-C	C-B	C-C	C-C
NC 5 @ McKenzie W/E	D-D	D-D	E-D	E-C	D-C	D-C	E-C	E-C
NC 5 @ Barrett/McCaskill	C-C	D-E	E-F	C-D	C-D	C-C	C-D	C-C
NC 5 @ Linden/McLean	-	-	-	-	-	-	-	C-D
NC 5 @ Shaw SW/SE	-	-	-	-	-	-	-	D-B

Stop Sign Controlled Intersections - Noon Peak Hour

	2005	2007	2009	2011	2013	2015	2018	2020
INTERSECTION	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*
NC 5 @ McDonald W/E	C-C	C-B	D-D	D-C	C-C	C-B	C-C	C-C

Stop Sign Controlled Intersections - PM Peak Hour

	2005	2007	2009	2011	2013	2015	2018	2020
INTERSECTION	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*	*EB-WB*
NC 5 @ McDonald W/E	C-C	C-B	D-D	D-C	C-C	C-B	C-C	C-C
NC 5 @ McKenzie W/E	D-D	D-D	E-D	E-C	D-C	D-C	F-E	F-E
NC 5 @ Barrett/McCaskill	C-C	D-E	E-F	C-D	C-D	C-C	C-D	C-C
NC 5 @ Linden/McLean	-	-	-	-	-	-	-	E-D
NC 5 @ Shaw SW/SE	-	-	-	-	-	-	-	C-C

Signalized Intersections - AM Peak Hour

	2005	2007	2009	2011	2013	2015	2018	2020
INTERSECTION	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*
NC 5 @ McKenzie W/Cherokee (NC 2)	C-C	C-B	D-D	D-C	C-C	C-B	C-C	C-C
NC 5 @ Morganton	D-D	D-D	E-D	E-C	D-C	D-C	E-C	C-C
NC 5 @ Lake Hills/Monticello	C-C	D-E	E-F	C-D	C-D	C-C	C-D	C-A
NC 5 @ Trotter/Blake	C	B	B	C	B	B	C-A	B-A

Signalized Intersections -Noon Peak Hour

	2005	2007	2009	2011	2013	2015	2018	2020
INTERSECTION	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*
NC 5 @ Morganton	D-D	D-D	E-D	E-C	D-C	D-C	E-C	C-C
NC 5 @ Trotter/Blake	C	B	B	C	B	B	D-A	B-A

Signalized Intersections - PM Peak Hour

	2005	2007	2009	2011	2013	2015	2018	2020
INTERSECTION	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*	*E/W-N/S*
NC 5 @ McKenzie W/Cherokee (NC 2)	C-C	C-B	D-D	D-C	C-C	C-B	C-C	C-C
NC 5 @ Morganton	D-D	D-D	E-D	E-C	D-C	D-C	E-C	C-C
NC 5 @ Lake Hills/Monticello	C-C	D-E	E-F	C-D	C-D	C-C	C-D	C-B
NC 5 @ Trotter/Blake	C	B	B	C	B	B	D-A	B-B

Source: Village of Pinehurst NC-5 Corridor, 2020 Traffic Update.

Starting in 2005, the Village of Pinehurst has conducted a biannual review of the major intersections along NC-5 from Trotter Drive/Blake Boulevard to McDonald Road. The table on the previous page provides a summary of the traffic volumes and capacity analysis from the Village of Pinehurst NC-5 Traffic Update Report, focusing on the intersections within the study area. Traffic Volumes have increased steadily along the NC-5 corridor and the (LOS) at these critical intersections has declined as indicated in the table below. The most congested signalized intersection is NC-5 at Morganton Road with a 2018 LOS E in both the morning (AM) and afternoon (PM) peak hours. The most congested non-signalized intersection is NC-5 at McKenzie Road with a LOS F in both the AM and PM peak hours.

In summary, based on a corridor planning level capacity analysis for a 2-lane class 2 arterial roadway carrying 20,000 vpd and the capacity analysis of the individual intersections, NC-5 is operating below capacity (LOS D) during AM and PM peak travel times where motorists experience travel speeds below 10 MPH and vehicle delays at critical intersections in excess of 45 seconds/vehicle during AM and PM peak travel times.

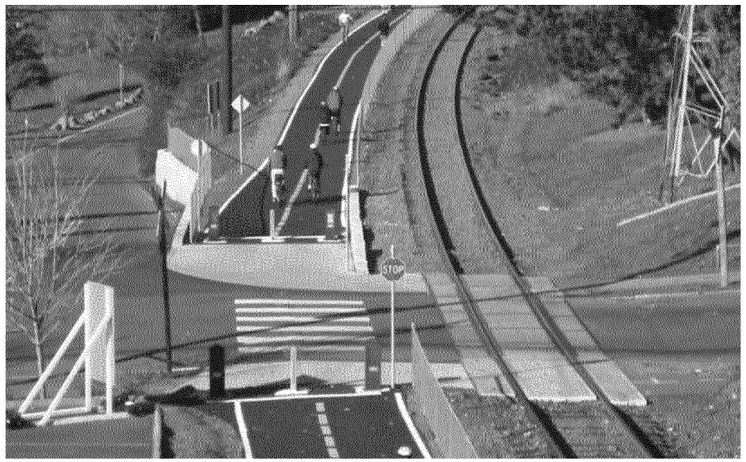
ABERDEEN CAROLINA AND WESTERN RAILWAY (ACWR)
The ACWR runs parallel to, and east of, NC-5 through the study area and carried 102 trains in 2020. The inbound trains carry feed for chicken farms and typically carry 90 cars while the return trains carry lumber, wood chips, aggregate, and rebar. The ACWR would like to increase train lengths to 110 cars and subsequently would like to close the at-grade rail crossing on Arnette Street. This closure would allow the longer trains to stop between Olivia Lane and Blake Boulevard without blocking vehicular traffic. To accommodate this closure, Olivia Lane would be upgraded to an NCDOT facility and become a full, potentially signalized, intersection at NC-5 with a connection to Arnette Street via Olivia Lane.

The at-grade rail crossing on Blake Boulevard sometimes experiences motorist stopping on the railroad track despite fully functioning gates and signage. More signage and/or enhanced pavement markings are recommended to reinforce the proper stopping location for motorist at this rail crossing.

GOLF CARTS
Golf carts are not allowed on NC-5 nor would they be allowed on the shared-use path. Improved golf cart access to this area would need to be established along residential streets where golf carts are allowed and by enhancing golf cart crossings on NC-5.

BICYCLE AND PEDESTRIAN
Bicycle and Pedestrian accommodations are lacking in the Pinehurst South Area as NC-5 lacks accommodations for these modes of travel and the local streets have been built without sidewalks. Currently, there are two NCDOT projects for NC-5 that will include sidewalks on the west side of NC-5 through the study area.

There is an opportunity for a 8- or 10- foot wide shared-use path (SUP) to be built along the east side of NC-5, enhancing bicycle and pedestrian mobility along this corridor as well as connecting Pinehurst South with the Village Center and Pinehurst Resort. Representatives from the ACWR Company, who owns the property right-of-way (ROW) to the east of NC-5, indicated that they would be open to allowing a shared-use path (SUP) within the railroad right-of-way through a program called “Rails with Trails”. The ACWR will be involved with the planning and design of any SUP within their ROW. The ACWR has expressed concerns about keeping users of any SUP completely separated from the railroad through physical barriers (fencing); however, they are open to the concept of coexisting with a SUP. To see a section of the proposed SUP, see page 62 of this document. Other recommended pedestrian & bicycle improvements in the Pinehurst South study area include sidewalk connections between existing and planned neighborhoods to provide connectivity between communities in the study area. To see the proposed pedestrian network, see page 60 of this document.



Precedent - Shared-Use Path
Source: Village of Pinehurst

Traffic Impacts of Pinehurst South Build-Out Plan

Based on the 50-year Build-Out Development Plan for the Pinehurst South Area, traffic was generated for the proposed new land uses based on the Institute of Transportation Engineers (ITE) trip generation manual, which is universally accepted by Traffic Engineers and Planners to project future traffic based on various land-uses. Traffic was generated for the two development options, Low Intensity and High Intensity, for the Pinehurst South study area. Also, traffic generation was split between proposed future development sites on the east side and the west side of NC-5.

TRIP GENERATION

As development is phased in over the next 50 years, there will be a total of about 11,349 new trips per day created by the Low Intensity development scenario to about 12,905 new trips per day created by the High Intensity scenario. See tables below for a summary of the total trips generated for these options.

Because the proposed development is a mixture of uses (residential, retail, restaurant), not all of these trips will result in actual new vehicle trips. Some of these trips will be absorbed by internal capture as patrons of the new shops may also decide to dine at one of the new establishments, thus eliminating a new vehicle trip. (these are known as “internal capture” trips). Also, as NC-5 is a heavily traveled major thoroughfare carrying about 20,000 vehicles per day (vpd), some of the vehicles already traveling on NC-5 are likely to be attracted to the new development as they pass-by on their way to other destinations and will not increase the total number of new vehicle trips (these are known as pass-by trips).

Based on internal capture and the pass-by trips, the total new vehicle trips per day will be reduced by about 30% . This trip reduction due to internal capture and pass-by trips is an accepted practice by Transportation Engineers and Planners. Based on the ITE Trip generation rates and pass-by/internal capture reduction of 30%, it is estimated that there will be an additional 7,944 vpd to 9,033 vpd on the surrounding street network.

TRIP DISTRIBUTION

It is estimated that about 80% of the new vehicle trips will originate from NC-5 and about 20% of the new vehicle trips will originate from the local street network which will be connected to the new development(s) in the Pinehurst South Area via new connections as illustrated in the future development plan. This will result in an increase of between 6,355 vpd to 7,266 vpd on NC-5 and an increase of 1,588 vpd to 1,806 vpd to the local street system, which will be split between the east side of NC-5 (60%) (953 to 1,084 vpd) and the west side of NC-5 (40%) (635 to 722 vpd)

TRAFFIC IMPACTS

The section of NC-5 running through the Pinehurst South study area is currently carrying around 20,000 VPD and is estimated to be operating at a LOS D with overall travel speeds at or below 10 MPH during peak travel times (based on planning level capacity analysis) with several of the intersections operating at or below LOS E with delays in excess of 45 seconds per vehicle during peak travel times (based on capacity analysis conducted by the Village).

Without intevention, improved connectivity, or mobility choice, the projected increase of 6,355 VPD to 7,266 VPD on this section of NC-5 over the next 50 years due to planned development in the Pinehurst South study area will further increase traffic congestion along this section of NC-5. However, mitigation measures should coincide with development and increased traffic will be gradual as new development is phased-in over the next 50 years. There are some planned roadway improvements and long-range transportation plans which will also help to off-set the impacts of this traffic growth (see the following page for more information).

EASTBOUND DAILY AND PEAK HOUR TRIPS

Pinehurst South (EAST) Opt A - Low Intensity Scheme				
		Daily Trips (vpd)	**AM Peak Hour Trips (vph)**	**PM Peak Hour Trips (vph)**
North of Blake Blvd	Subarea A	2,974	179	248
	Subarea B	425	52	106
Subtotal		**3,399**	**231**	**354**
South of Blake Blvd	Subarea A	242	43	89
	Subarea B	1,465	216	186
	Subarea C	1,220	206	165
	Subarea D	325	44	96
	Subarea E	286	41	93
	Subarea F	78	5	7
	Subarea G	206	38	86
	Subarea H	280	5	26
	Subarea I	78	5	7
	Subarea J	148	5	13
Subtotal		**4,328**	**608**	**768**
TOTAL		**7,727**	**839**	**1,122**

Pinehurst South (EAST) Opt A - High Intensity Scheme				
		Daily Trips (vpd)	**AM Peak Hour Trips (vph)**	**PM Peak Hour Trips (vph)**
North of Blake Blvd	Subarea A	2,974	179	248
	Subarea B	626	103	129
Subtotal		3,600	282	377
South of Blake Blvd	Subarea A	402	69	106
	Subarea B	1,465	216	186
	Subarea C	1,220	206	165
	Subarea D	447	76	110
	Subarea E	399	68	106
	Subarea F	212	39	86
	Subarea G	206	38	86
	Subarea H	388	26	34
	Subarea I	78	5	7
	Subarea J	148	5	13
Subtotal		**4,965**	**748**	**899**
TOTAL		**8,565**	**1,030**	**1,276**

Note: To see the corresponding Low and High-Intensity Schemes, see pages 72-73 of this document.

Transportation Improvements

NCDOT has plans to make the following improvements to NC-5 starting in 2025:

STIP Project U-5756 – Widen NC-5 to five-lane section from US 1 to north of Turning Leaf Way and to a three-lane section from north of Turning Leaf Way to Trotter Drive/ Blake Boulevard. This improvement project will include the installation of a sidewalk along the west side of NC-5 from US 1 to Trotter Drive/Blake Boulevard.. U-5756 is currently under design with right-of-way acquisition scheduled for State fiscal year 2023 and construction to start in State fiscal year 2025.

STIP Project R-5892 – Make operational improvements (add turn-lanes and improve traffic signals) on NC-5 from Blake Boulevard/Trotter Drive to NC 211. A feasibility study is currently underway. A construction date has not been established for R-5892 and the project is currently unfunded in the State Transportation Improvement Plan (STIP)

Beyond these two State Projects, no additional roadway improvements are recommended to NC-5. NC-5 is the main travel corridor in the study area and is constrained by the ACWR which runs parallel to NC-5 on the east side, at some points less than 30 feet from the edge of existing pavement. Any further roadway expansion, beyond what NCDOT currently has planned, would likely result in negative impacts and relocations to the homes and businesses to the west of NC-5.

WESTERN CONNECTOR

The Village of Pinehurst Thoroughfare Plan and the Moore County Comprehensive Transportation Plan (CTP) include the "Western Connector" which could provide a new north-south highway around the Village Center. The western connector could provide an alternate route for through-trips(trucks) between US 1 and NC 211 and provide long term traffic relief which could liberate NC-5/ Beulah Hill Road for local travel. The "Western Connector" is on the long-range transportation plan and is conceptual at this stage, however; the benefits and costs need to be carefully evaluated for future prioritization.

PEDESTRIAN/BICYCLE IMPROVEMENTS

There is an opportunity for a 10-foot wide shared-use path (SUP) to be built along the east side of NC-5 in the ACWR right of way. The SUP would greatly enhance bicycle and pedestrian mobility along this corridor as well providing a vital connection between Pinehurst South and The Village Center. The ACWR Company has indicated that they would be open to allowing a SUP. Other recommended pedestrian & bicycle improvements in the Pinehurst South study area include sidewalk connections between existing and planned neighborhoods which would provide safe pedestrian connectivity between communities in the study area.

OTHER IMPROVEMENTS

» Recommended improvements to the SAP suggest providing better connections between existing and planned neighborhoods within the study area. Better local street connections can reduce traffic impacts to NC-5 by providing internal circulation and access to both existing and proposed developments.

» Enhanced cross-walks along NC-5 to delineate safe crossing locations and alert motorist to pedestrian, bicycle and golf cart crossings.

» Close the Arnette Street RR crossing and access to NC-5. To accommodate this closure, Olivia Lane would be upgraded to an NCDOT facility and become a full, potentially signalized, intersection at NC-5 with a connection to Arnette Street via Olivia Lane.

» More signage and/or enhanced pavement markings are recommended to reinforce the proper stopping location for motorist at this rail crossing.

WESTBOUND DAILY AND PEAK HOUR TRIPS

Pinehurst South (WEST) Opt A - Low Intensity Scheme				
		Daily Trips (vpd)	**AM Peak Hour Trips (vph)**	**PM Peak Hour Trips (vph)**
	Subarea A	159	5	14
	Subarea B	316	15	29
	Subarea C	102	5	9
	Subarea D	234	16	21
	Subarea E	887	155	68
	Subarea F	269	5	25
	Subarea G	1,655	159	133
TOTAL		**3,622**	**360**	**299**

Pinehurst South (WEST) Opt A - High Intensity Scheme				
		Daily Trips (vpd)	**AM Peak Hour Trips (vph)**	**PM Peak Hour Trips (vph)**
	Subarea A	439	29	37
	Subarea B	586	39	48
	Subarea C	102	5	9
	Subarea D	234	16	21
	Subarea E	887	155	68
	Subarea F	269	5	25
	Subarea G	1,823	190	215
TOTAL		**4,340**	**439**	**423**

Note: To see the corresponding Low and High-Intensity Schemes, see pages 72-73 of this document.

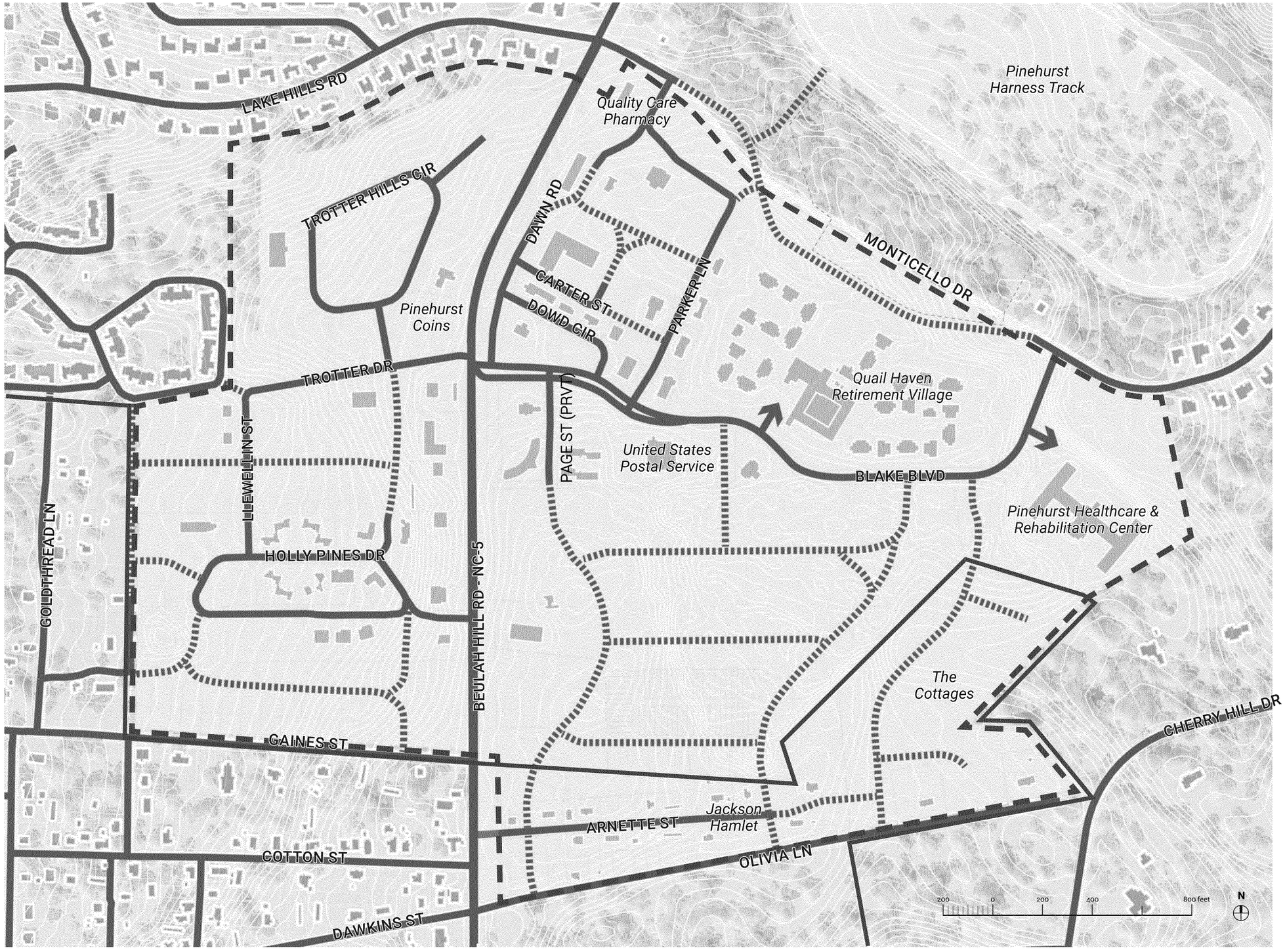
Proposed Circulation Plan

The proposed Circulation Plan for Pinehurst South emphasizes an improved, connected network of streets. This system will provide additional routes for vehicles (as well as for pedestrians, bicycles, and golf carts), thereby reducing traffic stress on any single street. The circulation recommendations include:

- Three new street connections from Olivia Lane to Blake Boulevard
- Realignment of Monticello Drive to accommodate the the potential relocation of the Public Service Facility south of the Harness Track
- Coordination with NCDOT planned improvements along NC-5
- The improvement of Olivia Lane as a full, signalized NC-5 intersection, connected to Arnette St. (to be closed to NC-5)
- Improved pedestrian, bicycle, and golf cart crossings of NC-5 with crosswalks added at signalized intersections

KEY

- SMALL AREA PLAN (SAP) BOUNDARY
- VILLAGE OF PINEHURST
- EXISTING STREETS
- PROPOSED STREETS
- PROPOSED ROAD CLOSURE



This plan is illustrative only and subject to change. Source: Design Collective, Inc.

Proposed Street Section
NC-5/Blake Boulevard

The proposed Street Section at the intersection of NC-5 and Blake Boulevard envisions improvements for pedestrians, bicycles, golf carts, and vehicles.

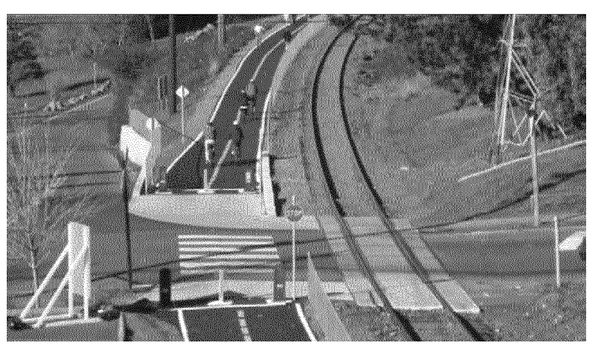
This proposed section coordinates with NCDOT planned improvements to add a sidewalk to the west side of NC-5. While a proposes Shared-Use Path (SUP) runs between the eastern edge of the roadway and ACWR rail line (suggested to be part of the Rails-to-Trail program). Where the path is close to the rail line, a physical barrier will be required. Motorized vehicles, including golf carts, should not be permitted on the path.

Crosswalks are added at signalized intersections to improve pedestrian, bicycle, and golf cart crossings of NC-5.

Buffers shall be provided along NC-5 where constraints allow, to provide a seamless "evergreen" landscape that is typical to Village of Pinehurst streetscapes.

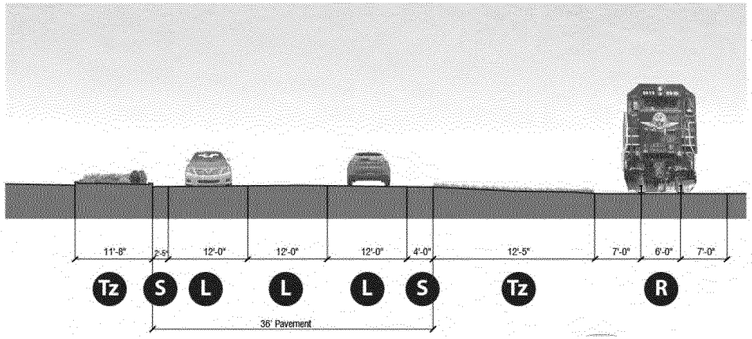
STREET SECTION KEY

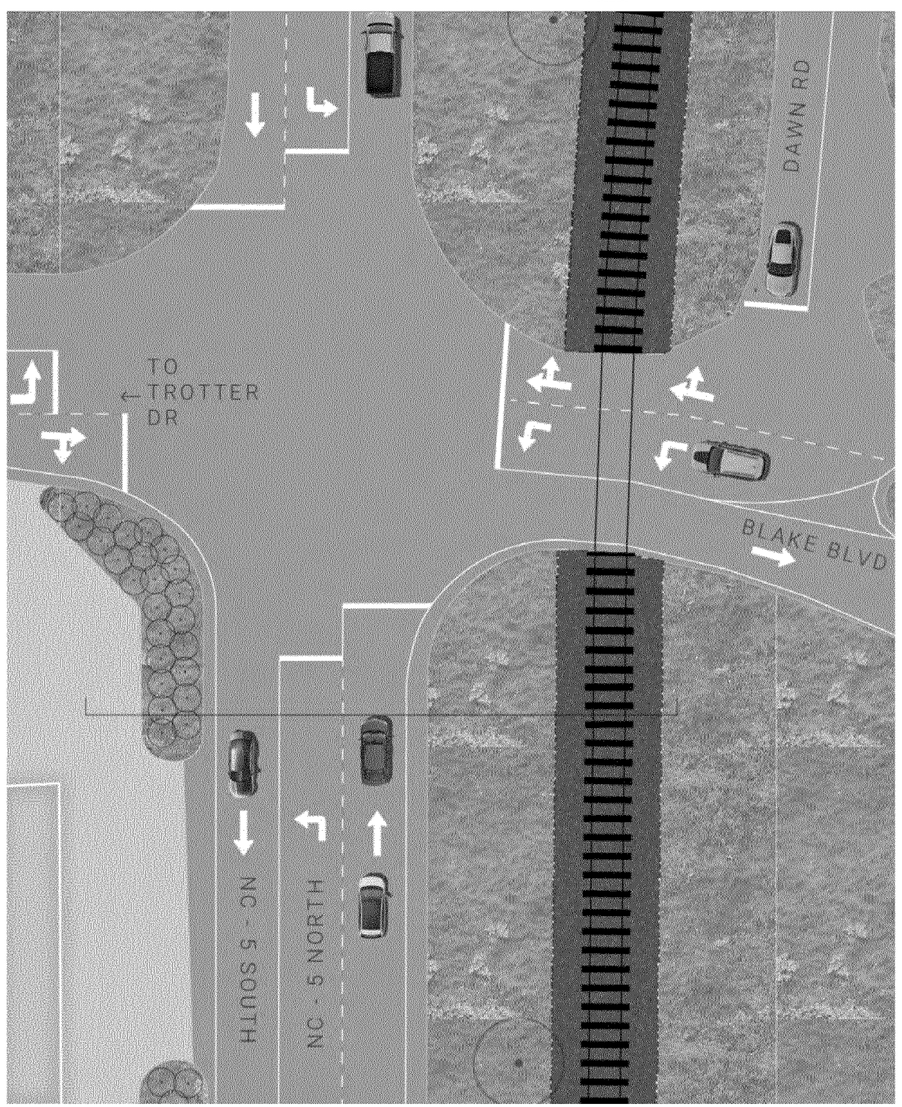
- S — SHOULDER
- PZ — PEDESTRIAN ZONE (SIDEWALK)
- TZ — TREE ZONE (PLANTING STRIP)
- SU — SHARED-USE PATH (BICYCLES & PEDESTRIANS)
- L — TRAVEL LANES (VEHICULAR)
- R — RAILROAD



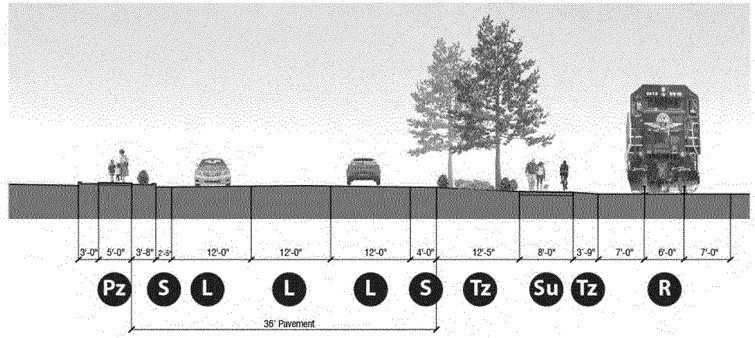
Precedent - Shared-Use Path
Source: Village of Pinehurst

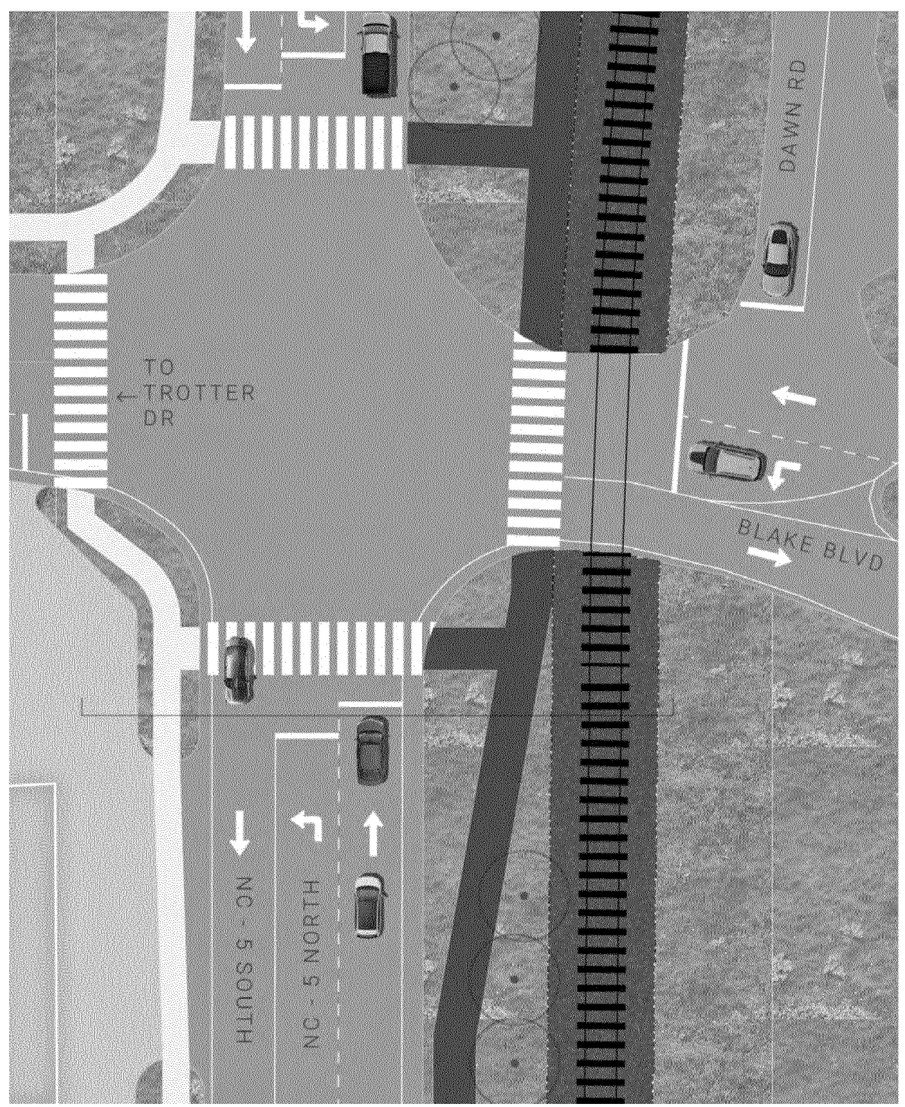
EXISTING





PROPOSED





Proposed Street Section - Typical Commercial

The Typical Commercial Street Section is a two-way, two-lane street with parallel parking; street trees and groundcover in stormwater management planters or tree pits; a 5' min. clear pedestrian zone; and a storefront zone for tables, chairs, potted plants, and displays.

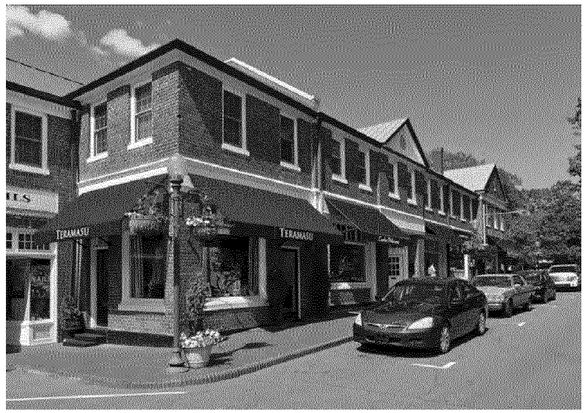
To reflect the character of Village Center, within the Pinehurst South area, brick sidewalks are required where buildings have commercial frontage.* The Village's standard benches and street lights shall also be incorporated.*

Parallel parking shall be incorporated on both sides of the street, where feasible, to provide additional parking spaces for patrons and visitors.*

* For additional criteria and more information on frontage and setback requirements, see the *Pinehurst South Form-Based Code*.

STREET SECTION KEY

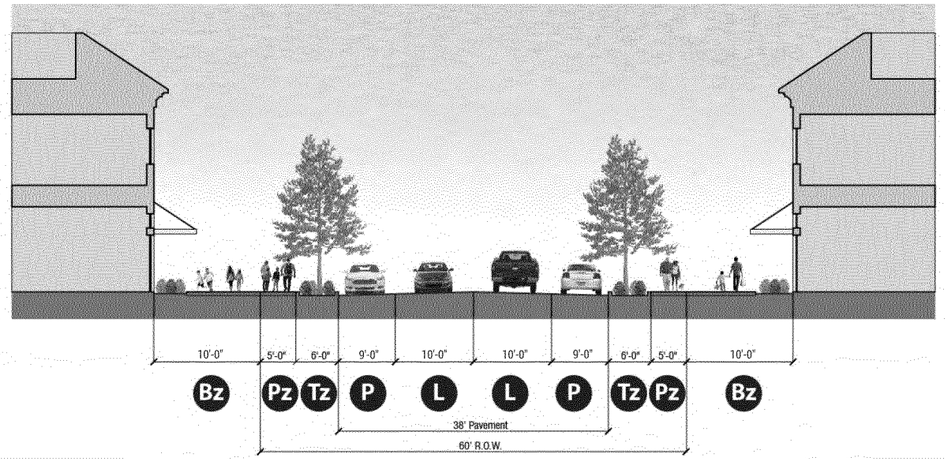
- BZ — BUILDING ZONE
- PZ — PEDESTRIAN ZONE (SIDEWALK)
- TZ — TREE ZONE (PLANTING STRIP)
- P — PARKING (PARALLEL)
- L — TRAVEL LANES (VEHICULAR)

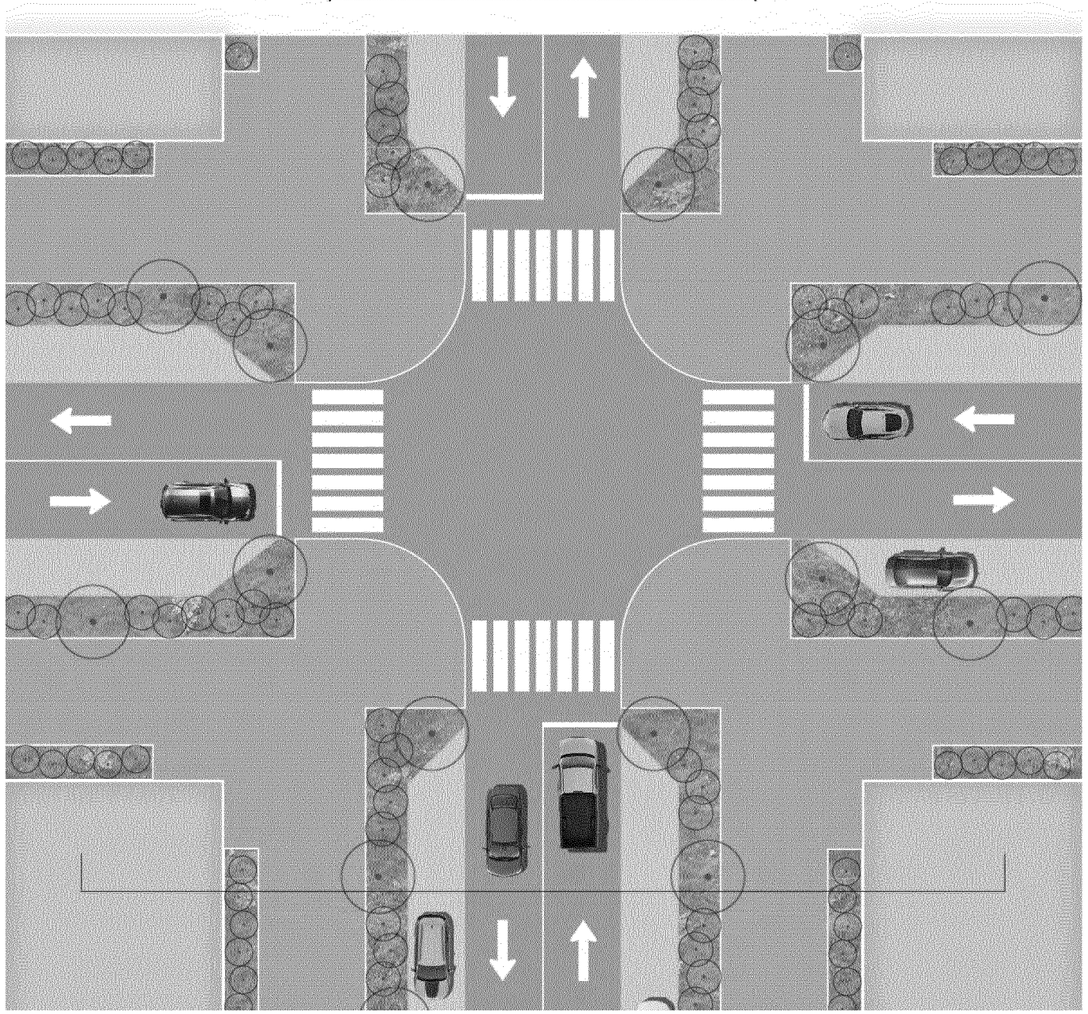


Mixed Use - Market Square, Pinehurst
Credit: VOP Rentals



Precedent - Mixed Use - Mashpee Commons, MA
Credit: PCA Design, Mashpee Commons, MA





Proposed Street Section - Typical Residential

The Typical Residential Street Section is a two-way, two-lane street with parallel parking; street trees and groundcover in stormwater management planters or tree lawns; and a 5' min. clear pedestrian zone.

In non-commercial areas, sidewalk material shall be specified as sand/clay, or concrete, as appropriate to context*.

Parallel parking shall be incorporated on both sides of the street, where feasible, to provide additional parking spaces for homeowners and visitors.*

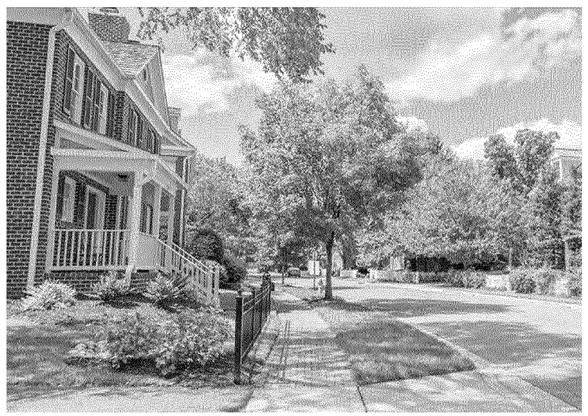
* For additional criteria and more information on frontage and setback requirements, see the *Pinehurst South Form-Based Code*.

STREET SECTION KEY

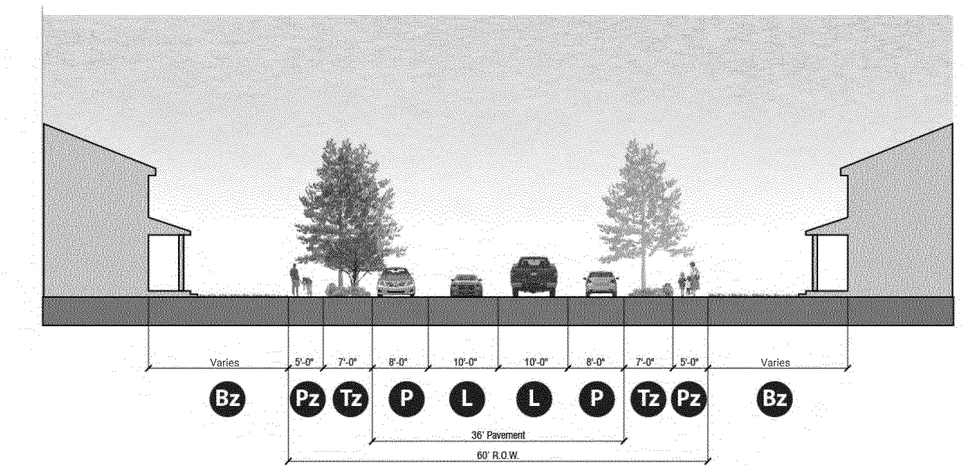
- BZ BUILDING ZONE
- PZ PEDESTRIAN ZONE (SIDEWALK)
- TZ TREE ZONE (PLANTING STRIP)
- P PARKING (PARALLEL)
- L TRAVEL LANES (VEHICULAR)

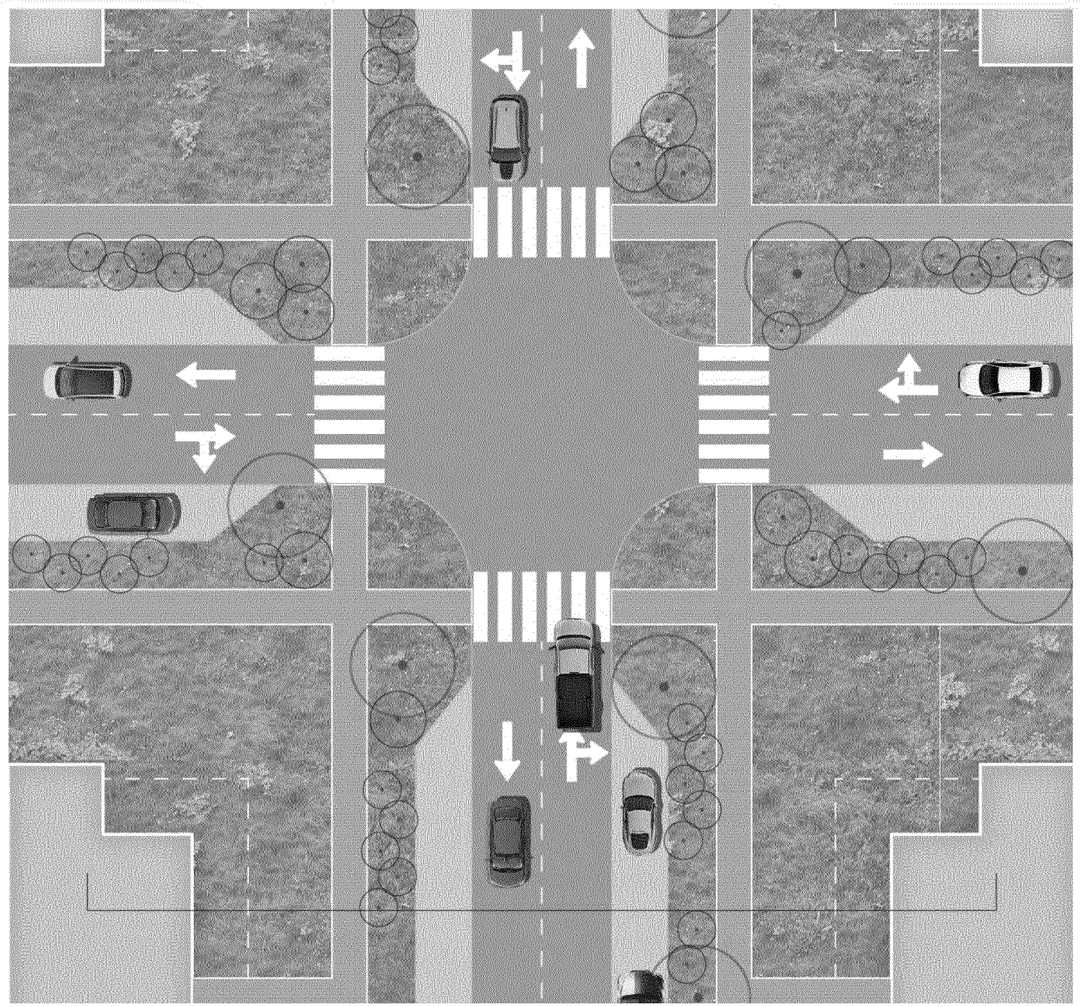


Precedent Residential Streetscape
Source: shortforkfarms.com



Precedent: Residential Streetscape - Kentlands, MD
Source: www.longandfoster.com





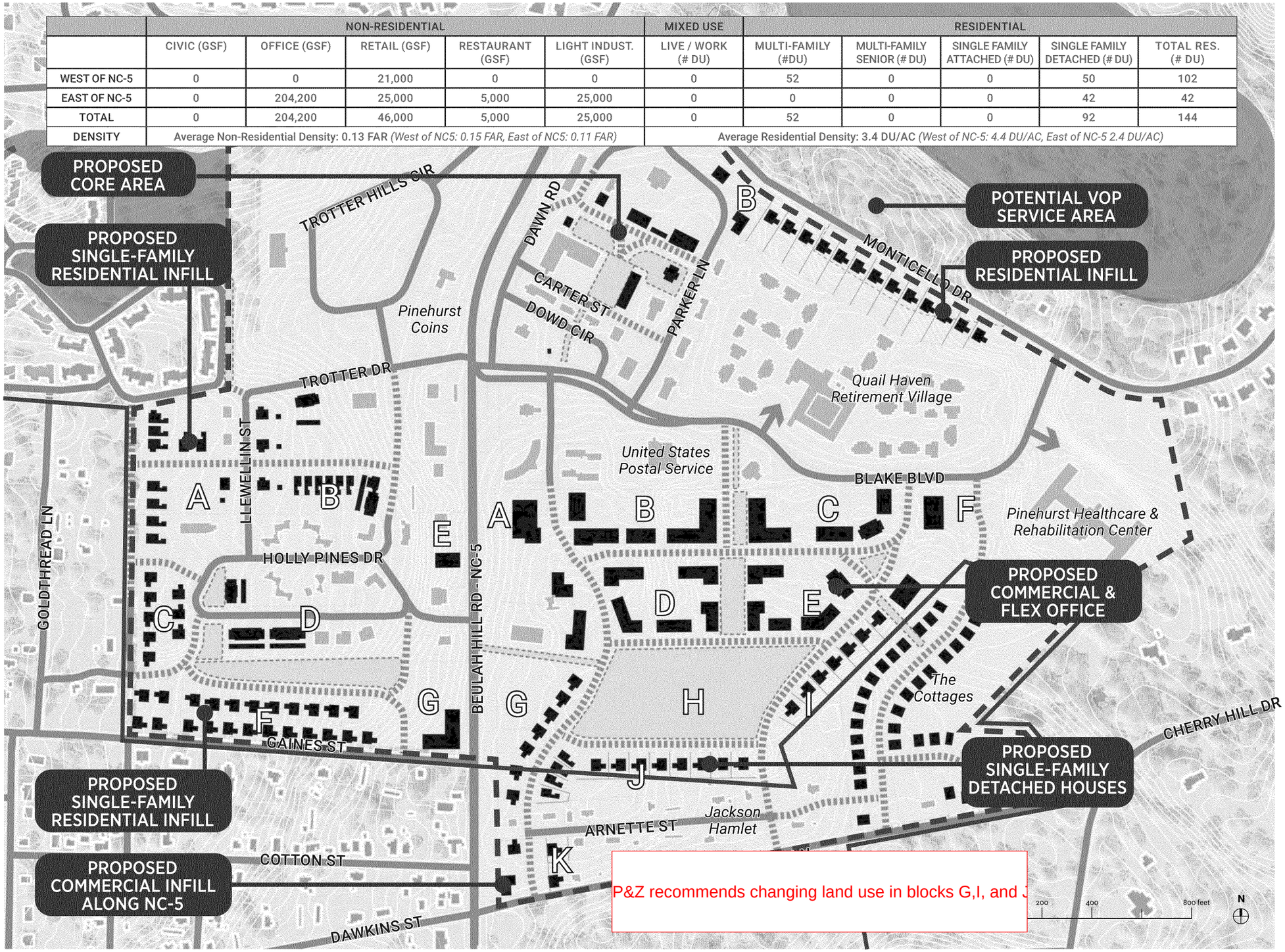
Build-Out Plan - Scenario 1 (low)

The Build-out Plan - Scenario 1 represents the cumulative efforts of the consultant team to create one potential, low intensity scenario of how the build-out of Pinehurst South may occur over the next 50+ years. This scenario is illustrative only and should not be considered the only option for this area. This build-out plan is based on the market demand and absorption rates per use, as projected by Duggal Real Estate Advisors (DREA). The *Pinehurst South Form-Based Code* (FBC) will regulate the character of development, in dimension, material, and detail - see that document for additional information.

This scenario shows the following:

- A core area is established between Monticello Dr. and Blake Blvd., east of NC-5
- To the south of Blake Blvd., a large Central Green creates a focal point for new, mixed-use development, serving as a space for activities and gathering and a transition to nearby residential
- Single-Family Detached (SFD) fronts three sides of this Green.
- On the west side of NC-5, SFD, Multi-family (MF), and small open spaces infill the residential areas, while commercial infill fronts NC-5.

	NON-RESIDENTIAL					MIXED USE	RESIDENTIAL				
	CIVIC (GSF)	OFFICE (GSF)	RETAIL (GSF)	RESTAURANT (GSF)	LIGHT INDUST. (GSF)	LIVE / WORK (# DU)	MULTI-FAMILY (#DU)	MULTI-FAMILY SENIOR (# DU)	SINGLE FAMILY ATTACHED (# DU)	SINGLE FAMILY DETACHED (# DU)	TOTAL RES. (# DU)
WEST OF NC-5	0	0	21,000	0	0	0	52	0	0	50	102
EAST OF NC-5	0	204,200	25,000	5,000	25,000	0	0	0	0	42	42
TOTAL	0	204,200	46,000	5,000	25,000	0	52	0	0	92	144
DENSITY	Average Non-Residential Density: 0.13 FAR *(West of NC5: 0.15 FAR, East of NC5: 0.11 FAR)*					Average Residential Density: 3.4 DU/AC *(West of NC-5: 4.4 DU/AC, East of NC-5 2.4 DU/AC)*					



P&Z recommends changing land use in blocks G,I, and J

KEY

- VILLAGE OF PINEHURST
- SMALL AREA PLAN BOUNDARY
- EXISTING ROADS
- PROPOSED ROADS
- EXISTING PARKS/OPEN SPACE
- PROPOSED PARKS/OPEN SPACE
- A SUBAREA LABEL

This plan is illustrative only and subject to change. Source: Design Collective, Inc.

Build-Out Plan - Scenario 2 (high)

The Build-out Plan - Scenario 2 represents the cumulative efforts of the consultant team to create an alternative, marginally higher intensity potential scenario of how the build-out of Pinehurst South may occur over the next 50+ years. As with the low intensity scenario, this scenario is illustrative only and should not be considered the only option for this area. This build-out plan is based on the market demand and absorption rates per use, as projected by Duggal Real Estate Advisors (DREA). The *Pinehurst South Form-Based Code* (FBC) will regulate the character of development, in dimension, material, and detail - see that document for additional information.

This scenario shows the following:

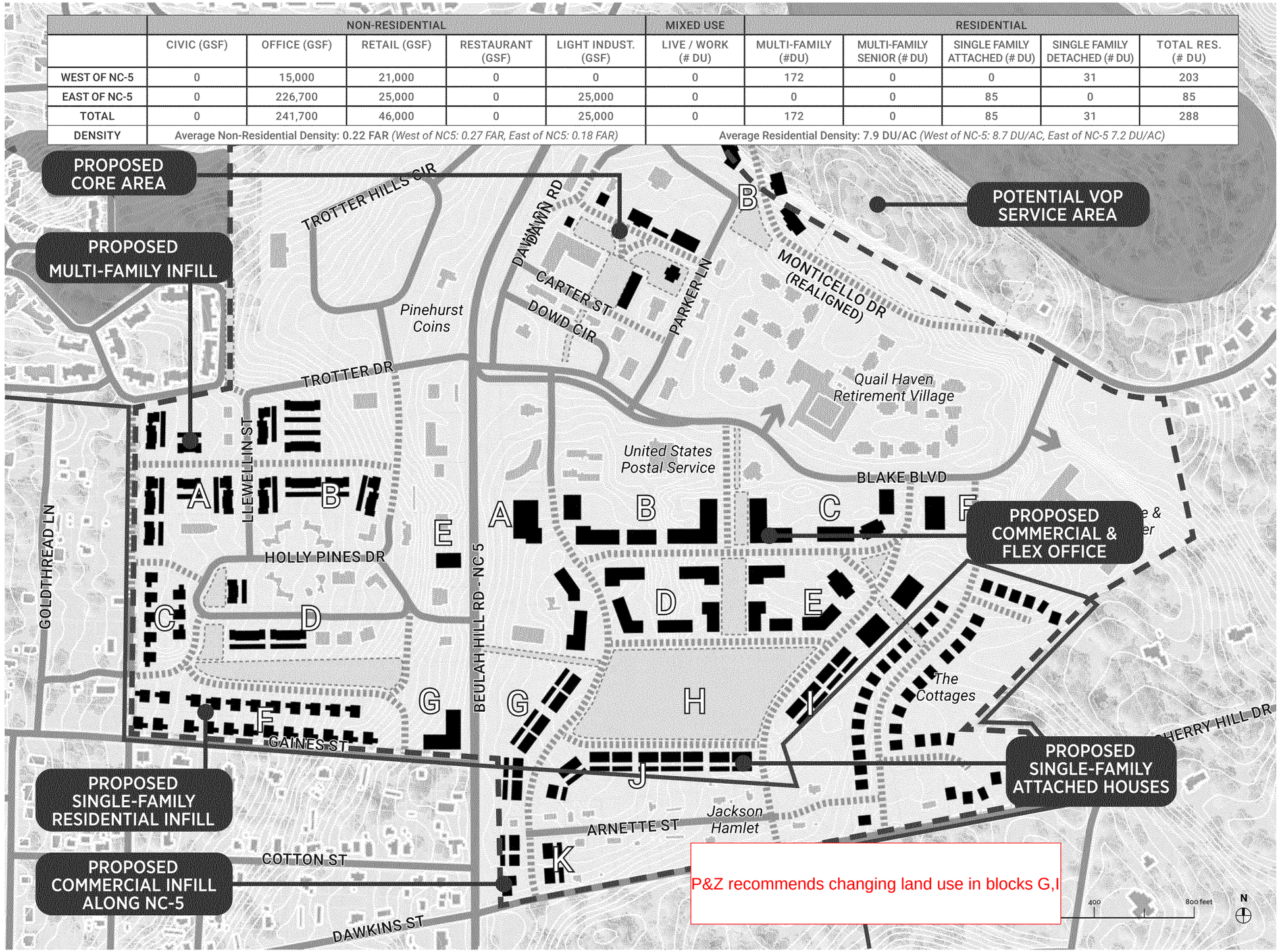
» A core area is established between Monticello Dr. and Blake Blvd., east of NC-5

» To the south of Blake Blvd., a large Central Green creates a focal point for new, mixed-use development, serving as a space for activities and gathering and a transition to nearby residential

» Single-Family Attached (SFA) fronts three sides of this Green.

» On the west side of NC-5, SFD, SFA, Multi-family (MF), and small open spaces infill the residential areas, while commercial infill fronts NC-5.

	NON-RESIDENTIAL					MIXED USE	RESIDENTIAL				
	CIVIC (GSF)	OFFICE (GSF)	RETAIL (GSF)	RESTAURANT (GSF)	LIGHT INDUST. (GSF)	LIVE / WORK (# DU)	MULTI-FAMILY (#DU)	MULTI-FAMILY SENIOR (# DU)	SINGLE FAMILY ATTACHED (# DU)	SINGLE FAMILY DETACHED (# DU)	TOTAL RES. (# DU)
WEST OF NC-5	0	15,000	21,000	0	0	0	172	0	0	31	203
EAST OF NC-5	0	226,700	25,000	0	25,000	0	0	0	85	0	85
TOTAL	0	241,700	46,000	0	25,000	0	172	0	85	31	288
DENSITY	Average Non-Residential Density: 0.22 FAR *(West of NC5: 0.27 FAR, East of NC5: 0.18 FAR)*					Average Residential Density: 7.9 DU/AC *(West of NC-5: 8.7 DU/AC, East of NC-5 7.2 DU/AC)*					



KEY

- VILLAGE OF PINEHURST
- SMALL AREA PLAN BOUNDARY
- EXISTING ROADS
- PROPOSED ROADS
- EXISTING PARKS/OPEN SPACE
- PROPOSED PARKS/OPEN SPACE
- A SUBAREA LABEL

Proposed Concept Plan - Phasing

Using the Market Analysis demand summary (shown in the charts to the right), the consultant team projected the potential timeframes of the proposed Pinehurst South Build-Out plan. The resulting Absorption Plan (on the following page) illustrates these timeframes. As with the Build-Out Plans, this absorption scenario is illustrative only and should not be considered the only option for this area, particularly considering that it can only occur as private and public property owners express interest in redeveloping or selling their parcels.

Civic
Civic uses were not analyzed as part of the Market Analysis and will be determined and developed as needed by the Village.

Residential
The Market Analysis displayed a high demand for residential; therefore, the potential for residential building in Pinehurst South is likely to be as soon as the next 0-10 years. The amount of residential shown in the Build-Out Plans is much less than the demand, as a result of feedback to consultants by Village staff and representatives.

Office
The amount of Office in the Build-Out Plans exceeds the current demand for this use in Pinehurst South. Therefore, while up to 5,000 SF/year is projected, it will take 50+ years to develop the program shown on these plans. Office north of Blake Boulevard should be prioritized over areas to the south in order to activate the proposed core area north of Blake.

Retail/Hospitality
The amount of retail proposed in the Build-Out Plans represents the full build-out potential for Pinehurst South. The build-out of this plan would likely take 10+ years as the demand potential is currently 20-25,000 SF every five years. The demand for retail will likely be higher where access to NC-5 is more direct, therefore retail near the new mixed-use core should be prioritized. This plan does not include hospitality as this use was seen as more appropriate near the Village Center

Golf courses were not included as part of the proposed plan for Pinehurst South, however, golf-related retail and light industry were seen as viable and are included within those use categories.

SUMMARY OF MARKET OPPORTUNITY

Land Use	Overall Market Opportunity	Village Place	Pinehurst South
For-Sale Residential	✓✓✓✓✓	✓✓✓✓	✓✓✓✓
For-Rent Residential	✓✓✓	✓✓✓	✓✓✓
Retail	✓✓✓✓	✓✓✓	✓✓✓
Office	✓✓	✓✓	✓✓
Hospitality	✓✓✓	✓✓✓	✓✓✓
Golf	✓✓	O	✓

Key: ✓✓✓✓✓ = best, ✓ = worst, O = none

SUMMARY OF DEMAND

Land Use	Demand Potential	Locations within Pinehurst
For-Sale Residential	80-120 homes/year	Almost anywhere
For-Rent Residential	15-25 units/year	Major roads, VP, PS, Village Cntr
Retail	20-25,000 SF/ every 5 years	Major roads, VP, PS, Village Cntr
Office	Up to 5,000 SF/year	Medical area, VP, PS, Village Cntr
Hospitality	25 rooms/yr. in Moore Co.	Resort, Village Cntr, PS, VP
Golf	2-3 courses over the next 10 years in Moore Co.	Focus Area 1 is the only area with space

For additional information regarding the Market Analysis summary, see Section 2.3 of this document.

SUMMARY OF DEMAND FOR LAND USE WITHIN PLANNING AREAS

Land Use	Pinehurst South
For-Sale Residential	Unlimited (up to build-out capacity) 1 project would sell approximately 15-25 homes per year
For-Rent Residential	1-2 projects of up to 200 units each, depending on the location Timing depends on where else apartments have been constructed
Retail	Up to 80,000 SF with grocery, 40,000 SF without grocery
Office	Up to 100,000 SF Limited amount per year. 5,000 SF total in Village. Pinehurst South could capture some of that. Could increase, depending on impact of USGA
Hospitality	1 hotel with approximately 100 rooms
Golf	Possibly some support functions (although the land probably has a higher and better use than maintence for golf)

Phasing Absorption Plan

In coordination with the Market Analysis, the consultant team developed a potential Absorption Plan to demonstrate the absorption potential based on demand projections (see the previous page for more information).

The Absorption Plan is based on Build-out Plan - Scenario 2, which can be found on page 73 of this document. However, due to slow absorption rate of Office and Retail and the relatively fast absorption rate of Residential, the absorption durations of Scenario 1 and Scenario 2 would be anticipated to be similar.



This plan is illustrative only and subject to change. Source: Design Collective, Inc.

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5.0 IMPLEMENATION

5.1 OVERVIEW

5.2 FISCAL ANALYSIS

5.1 OVERVIEW

Implementation summary to be included in final report.

5.2 FISCAL ANALYSIS

Introduction

When new development occurs within the Village of Pinehurst, it brings both new revenues to the Village (primarily in the form of new taxes) and new costs to the Village (in terms of services such as fire protection and police as well as new infrastructure such as roads or sewers). Therefore, an important component to understand the implications of the Small Area Plans (SAPs) is to understand the revenue and costs to the Village of added services and infrastructure based upon future potential plans. This analysis is called a Fiscal Impact Analysis.

To determine the revenue and the costs of added service and infrastructure on the Preferred Build-Out Plans for Village Place and Pinehurst South, the team utilized the **FY 2017 Land Use Fiscal Analysis** completed by the Village of Pinehurst in October 2017. This document provided a net fiscal impact of various types of development in the Village of Pinehurst. These are expressed either as a net surplus or net deficit per acre by land use type. Please see the callout box for important assumptions made in the original document. In addition, refer to the original **FY 2017 Land Use Fiscal Analysis** for the full explanation of methodology and assumptions used to determine the net fiscal impact of different land uses by acre.

One of the major findings for the Village was that the analysis indicated that residential land uses generate more net revenue for the Village than non-residential uses. This is due in large part to the fact that the majority of revenues in the Village are from property taxes and that retail sales tax distributions occur on a per capita basis (as opposed to retail square footage or number of businesses). WThey also noted that certain assumptions about gated communities had a significant impact on the Single Family – Medium Density land use since the communities have security and maintain their own roads. In addition, assumptions regarding vacancy (16% for single-family and 68% for multifamily) had a large impact on the results. Finally, some Multi-family developments do not use the Village's solid waste services and instead contract with a private hauler which impacts costs. It was noted that for future development, Village leaders should consider variables such as private security, private roads, and solid waste collection to determine the true cost of any future residential development.

Results of Fiscal Impact Analysis

Based upon the results of the analysis, utilizing the assumptions as described herein, the Small Area Plans could have the following annual impact on the Village of Pinehurst at build-out (e.g. when the plan is completely built):

- Village Place Preferred Program: -$40,003 estimated total annual impact
- Pinehurst South Program Low: -$32,192 estimated total annual impact
- Pinehurst South Program High: -$18,313 estimated total annual impact

The commercial and the residential land uses in the plans balance each other out to help bring the net fiscal impact fairly close to zero. As noted above, residential land uses have a positive net fiscal impact on the VOP (e.g. more residential in the plans creates more revenue) and commercial land uses have a negative impact on the net fiscal impact (e.g. more commercial in the plans creates less revenue).

Fiscal Impact Assumptions and Methodology

In order to complete the analysis, we utilized the following assumptions:

- We utilized the assumptions regarding surplus or deficit by acre without any changes from the 2017 report. As noted above, this could make some residential land uses appear more beneficial than they are since the SAPs do not contemplate gated communities and for the other various reasons noted above.
- We fit the land use categories from the current SAPs into those land use categories from the 2017 report.

Figure 2 on page 80 outlines how the current land use categories in the SAPs compare to the FY 2017 document.

The next step was to determine the likely acreage associated with the SAPs as the FY document reported the surplus and deficit by acreage. The proposed density is similar to the existing density in the Village Center. The calculations to determine density by land use were completed on a gross net basis, based on typical average lots, plus the minimum required open space at 8%, half the right-of-way, and half the alley, if applicable. The following Figure 3 includes the estimated density of the products by land use that were then used to determine acreage in the SAPs.

Figures 5 and 6 on page 81 are the calculations for each of the potential programs.

Page 1, FY 2017 Land Use Fiscal Analysis

"The 2017 Village of Pinehurst Land Use Fiscal Analysis was prepared by Village staff to determine the approximate net revenues or net expenditures of various land uses within the Village of Pinehurst corporate limits. Properties included in the Village's extra-territorial jurisdiction (ETJ) were not included in this analysis. This land use fiscal analysis was prepared using FY 2017 data and represents an estimate of current revenues and expenditures by land use for that period of time.

This analysis provides revenue and expenditure allocation principals that can be applied to any proposed future development to estimate the financial impact. It is not a perfect predictor of the financial impacts of future development because the impacts of future land uses will vary on a case by case basis. The actual revenues and expenditures generated by one acre of land can vary within the same land use type due to many variables. Therefore, the information contained in this analysis should be used to provide an approximation of the estimated net revenue or cost of development, recognizing the actual revenue and costs associated with any one particular development will likely not be the exact amounts shown in this report."

Figure 1: Land Uses from FY 2017 Land Use Fiscal Analysis Report and Net Impact Per Acre

Land use	Description	Net Annual Surplus (Deficit) Per Acre
Single Family – Low Density	R210: 5 acre lot/ 2,000 SF min	$520
Single Family – Medium Density	R-30: 30,000 SF lot/ 2,000 SF min R-20: 20,000 SF lot/ 2,000 SF min R-15: 15,000 SF lot/ 1,800 SF min	$1,054
Single Family – High Density	R-10: 10,000 SF lot/ 1,800 SF min R-8: 8,000 SF lot/ 1,500 SF min	$806
Multi-family Development	Density varies by zoning jurisdiction	$1,597
Office	General office, medical/dental office, government office, post office	($3,109)
Retail	Retail, car dealership, drugstore	($8,518)
Lodging	Hotel	($2,110)
Recreational	Park, marina, golf course, harness track, tennis facility, fitness center	$52
Institutional	School, church, library	($6,622)
Medical	Hospital, nursing home, clinics	($6,995)
Industrial	Utilities, manufacturing, warehousing	($110)
Services	Bank, real estate office, restaurant, gas station	($3,230)

Figure 2: Land Uses from SAPs Compared to FY 2017 Report

Land Use in SAP	Corresponding Land Use in FY 2017 Report
Civic	Institutional
Office	Office
Retail/Restaurant	40% Retail, 60% Services
Hotel	Lodging
Light Industrial	Industrial
Live / Work	Multi-Family Dev.
Multi-Family	Multi-Family Dev.
Multi-Family Senior	Multi-Family Dev.
Single-Family Attached	Multi-Family Dev.
Single-Family Detached	Single-Family - High Density

Figure 3: Estimated Density by Land Use to Determine Acreage in SAPs

Land Use	FAR*/Dwelling Unit (DU)/Key Per Acre
Civic	1.00
Office	0.50
Retail/Restaurant	0.33
Hotel	50
Light Industrial	0.25
Live / Work	12
Multi-Family	18
Multi-Family Senior	25
Single-Family Attached	10
Single-Family Detached	5.5

* Floor Area Ratio (FAR) is the measurement of a building's total amount of usable floor area in relation to the total area of the lot on which the building stands.

Figure 5: Pinehurst South Low Program Calculations

	Non-Residential					Mixed-Use	Residential				
Land Use in SAP	**Civic (GSF)**	**Office (GSF)**	**Retail/ Restaurant (GSF)**	**Hotel (Keys)**	**Light Indust. (GSF)**	**Live / Work (# DU)**	**Multi-Family (#DU)**	**Multi-Family Senior (#DU)**	**Single-Family Attached (#DU)**	**Single-Family Detached (#DU)**	**Total Program**
Pinehurst South Program Low											
W of NC 5	0	0	21,000	0	0	0	52	0	0	50	
E of NC 5	0	204,200	30,000	50	25,000	0	0	0	0	42	
Total	0	204,200	51,000	50	25,000	0	52	0	0	92	
Pinehurst South Program Low in Acres											
W of NC 5	0.0	0.0	1.4	0.0	0.0	0.0	2.9	0.0	0.0	9.1	13.4
E of NC 5	0.0	9.4	2.1	1.0	2.3	0.0	0.0	0.0	0.0	7.6	22.4
Total	0.0	9.4	3.5	1.0	2.3	0.0	2.9	0.0	0.0	16.7	35.8
Pinehurst South Low Annual Revenue (Deficit) By Land Use											
W of NC 5	$0	$0	-$7,732	$0	$0	$0	$4,614	$0	$0	$7,327	$4,209
E of NC 5	$0	-$29,149	-$11,045	-$2,110	-$253	$0	$0	$0	$0	$6,155	-$36,402
Total	$0	-$29,149	-$18,777	-$2,110	-$253	$0	$4,614	$0	$0	$13,482	-$32,192

Figure 6: Pinehurst South High Program Calculations`

	Non-Residential					Mixed-Use	Residential				
Land Use in SAP	**Civic (GSF)**	**Office (GSF)**	**Retail (GSF)**	**Hotel (Keys)**	**Light Indust. (GSF)**	**Live / Work (# DU)**	**Multi-Family (#DU)**	**Multi-Family Senior (#DU)**	**Single-Family Attached (#DU)**	**Single-Family Detached (#DU)**	**Total Program**
Pinehurst South Program High											
W of NC 5	0	15,000	21,000	0	0	0	172	0	0	31	
E of NC 5	0	226,700	25,000	0	25,000	0	0	0	85	0	
Total	0	241,700	46,000	0	25,000	0	172	0	85	31	
Pinehurst South Program High in Acres											
W of NC 5	0.0	0.7	1.4	0.0	0.0	0.0	9.6	0.0	0.0	5.6	17.3
E of NC 5	0.0	10.4	1.7	0.0	2.3	0.0	0.0	0.0	8.5	0.0	22.9
Total	0.0	11.1	3.2	0.0	2.3	0.0	9.6	0.0	8.5	5.6	40.3
Pinehurst South High Annual Revenue (Deficit) By Land Use											
W of NC 5	$0	-$2,141	-$7,732	$0	$0	$0	$15,260	$0	$0	$4,543	$9,930
E of NC 5	$0	-$32,360	-$9,204	$0	-$253	$0	$0	$0	$13,575	$0	-$28,243
Total	$0	-$34,502	-$16,936	$0	-$253	$0	$15,260	$0	$13,575	$4,543	-$18,313

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