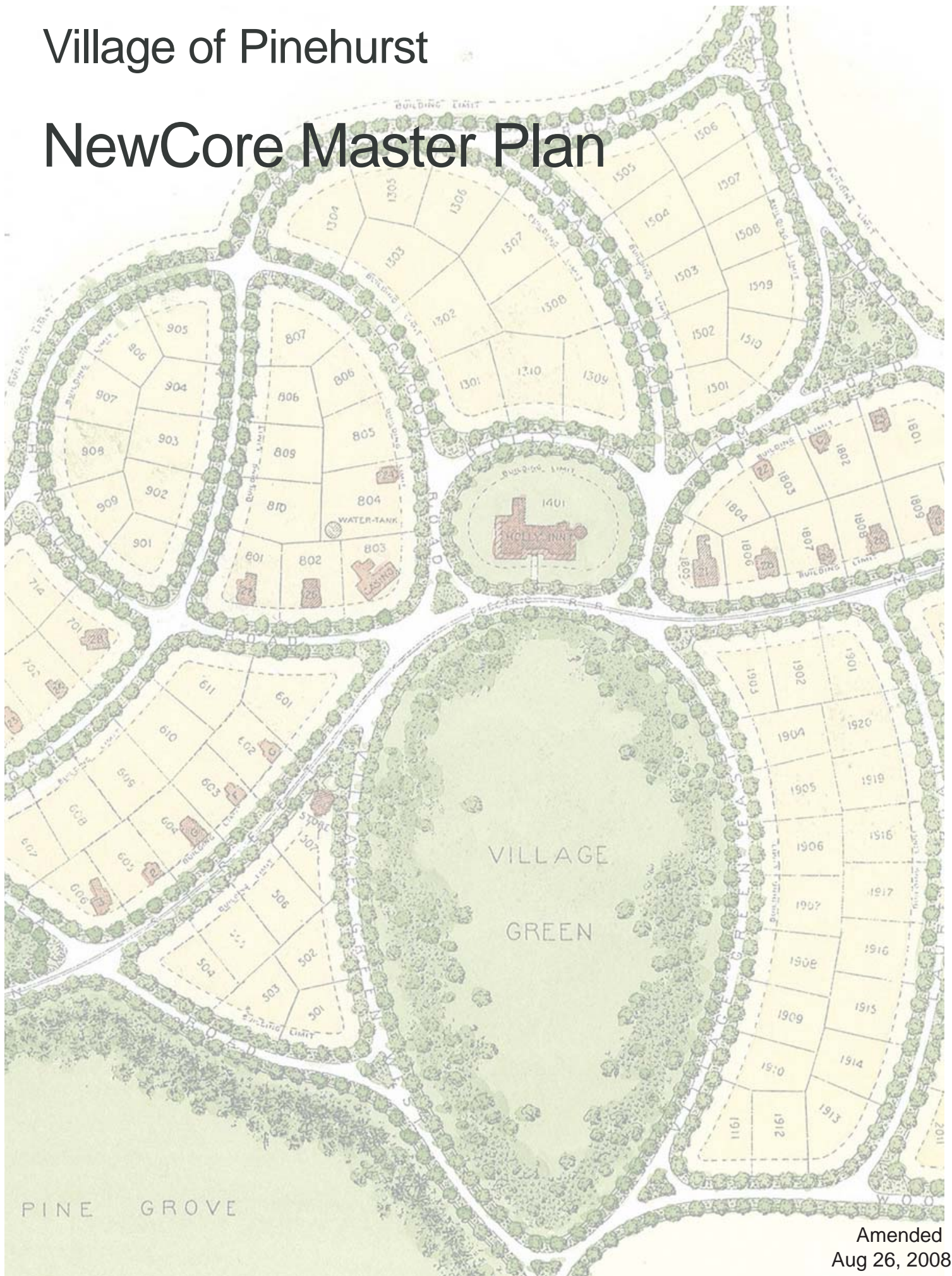


Village of Pinehurst

NewCore Master Plan



ACKNOWLEDGEMENTS

Village Council

Steven J. Smith, Mayor

George E. Hillier, Mayor Pro-Tem

Douglas A. Lapins, Treasurer

Virginia F. Fallon, Council Member

Lorraine A. Tweed, Council Member

Steering Committee

Jane Deaton, Chairperson

Virginia Fallon

Dick Bisbe

Tessie Chao

Murray Williamson

Howard Warren

Beth Kocher

Bruce Gould

Village Staff

Andrew Wilkison, Village Manager

Andrea Correll, Director of Planning and Inspections

Bruce Gould, Village Planner

Gwendy Hutchinson, Planning and Administrative Assistant

Consultant Team

Raybould Associates, LLC

The Walker Collaborative

Randall Gross / Development Economics

Harrison Marshall, Jr.

Edwin F. Harris, Jr.

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Executive Summary

Executive Summary

Introduction

This NewCore Master Plan originated with the desire of Pinehurst residents to continue and preserve the unique ambiance of their historic village on an infill site with tremendous potential. Few communities are fortunate enough to encounter a chance to plan for a tract of land optimally situated in the heart of a desirable community, yet functionally underutilized in relation to its latent value.

When developed to the standards and uses described in this document – the culmination of an intensive community effort with broad involvement and support – the NewCore area will enhance and strengthen Pinehurst in general and its best-loved, most historic neighborhood in particular. In creating this Master Plan, the project team and steering committee clearly recognized that a holistic approach was necessary, as the relationship between the NewCore and the surrounding area was critical to the success of both.

This Master Plan describes a walkable, livable, and economically functional vision for the NewCore which has been carefully tied to the preferences and needs of Village residents and property owners. The use of land; urban design and architectural considerations; transportation and parking functions; and market conditions have all been taken into account and addressed by this Master Plan. Most importantly, the plan is “owned” by those who participated in its development, and its success depends in part on a strong sense of ownership by those who will oversee its implementation.

While market forces will, to some extent, drive the pace of implementation, the synergy of an overall plan should create greater benefits for all than if the use of the NewCore were allowed to linger without an overarching vision. The concepts contained herein, implemented with care, have the potential to enhance the already high quality of life in Pinehurst. This plan is intended to be an evolving document and may be changed from time to time.

Plan Summary

Process

The NewCore Master Plan grew out of a comprehensive process that was both accessible and accountable to the public.

To give overall guidance to the effort, the Village Council appointed a Steering Committee to direct the consultant team and Village staff throughout the process. The procedural framework began with a research and fact-finding trip during which the project team visited the study area and became familiar with the setting and context of the site. During that visit and follow-up trips, members of the public expressed their opinions on desirable outcomes for the NewCore area. Numerous sessions were designed to give stakeholders many opportunities to make comments and propose ideas, both one-on-one and in small and large groups, including an interactive “Vision Survey.” Throughout these sessions, property owners, residents, business owners, and representatives of major Pinehurst institutions and civic groups provided valuable and specific input on the desired vision for the NewCore.

The centerpiece of the input and planning process was a three-day charrette that marshaled the resources of citizen participants, the Steering Committee, Village staff, and the consultant team to brainstorm, expound upon, and refine a “Concept Plan.” That concept – augmented by the expertise of the consulting team in law, real estate economics, urban design, and transportation – became the basis for an intermediate product containing visual renderings and detailed explanations of each component element in the concept plan. Based on the feedback of the Steering Committee, the draft plan was reviewed and further refined to produce the final plan contained in this document.

The study area

The study area consists of a site of approximately 19 acres located in close proximity to the picturesque shops and historic buildings of the Village Center, as well as to residential areas dating to the earliest years of the Village. In addition to this original area identified in the RFP and RFQ, periphery lands to the north and west are included. The study site functioned early on as the service core of Pinehurst Village, containing the steam plant and laundry, as well as worker housing. Over the years, it gradually metamorphosed into a collection of uses – ranging from single-family houses and offices to heavy commercial and light industrial uses. Despite its nearness to highly desirable amenities in the old Village core, the absence of a coherent vision for the NewCore, as well as the various uses and parcel ownership patterns, prevented the site from being utilized to its full potential. When the Village undertook its new comprehensive planning effort during 2001 to 2003, it was determined that the potential

of the NewCore warranted a formal master planning effort to guide its future development.

Economic factors

A number of observations arose from the market reconnaissance performed as a part of the planning effort. Among the advantages enjoyed by all Pinehurst properties, the heritage and lifestyle in Pinehurst create a “brand” with very strong market potential, one that can be used to advantage in the NewCore.

Among other factors, pressures for office space in Pinehurst may be creating competition for potential retail space in the old Village Center. Additional convenience retail, entertainment venues, and office space, if located appropriately in the NewCore, could enhance the market strength for retail in the Village Center while relieving some of the pressure on rents generated by a possible shortage of office space. The retail uses, in particular, should be located as close as possible to the old center in order to avoid dividing the “critical mass” of the destination area. With a strategic mix of residential and commercial uses, the Village Center’s relatively low market share of local residents (as opposed to visitors) could be strengthened. Additional visually attractive and complementary parking would also likely benefit new and existing retail uses, both in the Village Center and in the NewCore.

A potential buildout view of the NewCore, seen looking south along Rattlesnake Extension



There appear to be market opportunities in Pinehurst for high-end, no-maintenance housing options such as condominiums and live-work space, both for active retirees and for the increasing number of families in the area. Fee-simple zero-lot-line, patio home, and possibly townhouse condominiums or clustered single-family housing may have potential demand if designed for key target markets.

Physical master plan

Building on the consensus vision expressed during the public input stage of the plan effort, the physical master plan envisions the site as a coherent, walkable, mixed-use district. Alternatives to single-family homes on standard lots will be present, as will office and professional space. Retail uses – geared toward specialty shops, as well as some convenience retail – will be concentrated at the southern end of the site where the opportunities for synergy with the old Village Center are greatest. Entertainment, retail, office, and quasi-public or community space may be located in new buildings, or may occupy rehabilitated historic structures (in particular, the steam plant, Manor Inn, and firehouse).

The physical form and architectural character will mirror traditional Pinehurst ambiance, matching the strong preferences expressed by participants during the input and planning sessions. One- to two-story buildings will be the norm; only buildings on landmark sites will be allowed a third story or a lofty feature such as a cupola. Most buildings will be of brick or wood frame exterior appearance and will have roofs with a fairly steep pitch. Massing and articulation will break building planes into smaller components having a human scale, creating a comfortable sense for pedestrians.

Inviting public spaces – sidewalks, open spaces, small plazas, seating, and similar amenities – will entice the visitor to explore the NewCore and adjacent attractions on foot. Arbors, gates, awnings, flowerboxes, and other details will create a charming and well-cared-for appearance. Brick footpaths and sidewalks with wayfinding signage will lead visitors and residents to

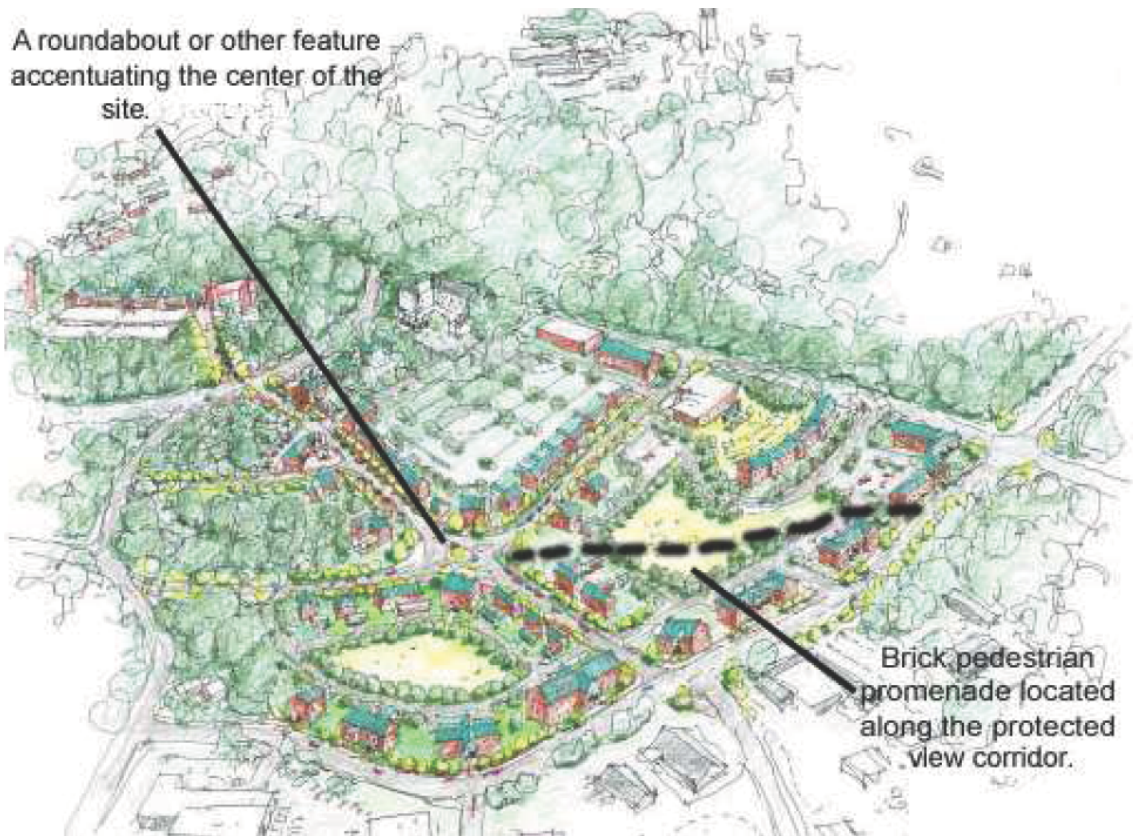
adjacent areas – the Arboretum with its walking trails, shops in the old Village Center. Landscaping materials will also reflect the “nature” of Pinehurst’s traditional neighborhoods, with abundant evergreen plants softening the hard edges of buildings even in winter.

Areas of open space will be provided and vistas and views will be protected.

Streets, parking, and other vehicular use areas will reflect a pedestrian orientation while still allowing cars to function normally. Some convenience parking will be tucked along street edges in the form of parallel and, optionally, angled spaces, while bulk parking areas will be hidden from view to the rear of buildings (with signage to ensure that it can easily be found by drivers).

A simulated aerial view of the New Core after buildout, looking southwest from a vantage point above McCaskill.

This is just a representation and not intended to dictate building location, density, or design.



Planning Process

Planning Process

Project Objectives

The Plan Objectives were well articulated in the Village's Request For Proposals:

The NewCore was identified in the Village's Comprehensive Long Range Plan as an area that needed its future development to be guided by a master plan which would provide integrated planning and development, rather than letting it proceed to be developed in an ad hoc manner.

The master plan for the area needs to consider the following factors: the proximity to the core of the historic district; the accommodation of current uses; the existing and abutting uses; that the area may be developed over time, rather than all at once; the character of Pinehurst; [and] the needs of the Pinehurst citizens. With all this said, however, the Village is seeking a creative plan that may incorporate hybrid zoning, be flexible, accommodate mixed uses (including non-traditional residential) and provide for parking, and open spaces.

Project Methodology

The creation of the NewCore Master Plan has followed a 5-step process in which each step is logically sequenced to build upon the previous step, as follows:

- Step 1: Background Research and Analysis
- Step 2: Vision Survey
- Step 3: Charrette and Concept Plan Development
- Step 4: Preparation and Presentation of Draft Plan
- Step 5: Final Revisions and Presentation

This master plan document builds upon the information collected during the initial background trip, the results of the *Vision Survey*, the conclusions of the *Market Reconnaissance Report* and the Village's review of the *Concept Plan*. The *Concept Plan* served as the framework and basis for this master plan document, which elaborates on the key concepts with much greater detail.



Quality Public Process

Village leaders required extensive opportunities for citizen involvement. Throughout the process, citizens, Village staff, Steering Committee members and Village Council have been instrumental in providing information, making recommendations and reviewing work product. Public involvement has encompassed the following activities:

- Background Interviews, Group Meetings and Project Kick-Off and Discussion
- Vision Survey and Discussion
- Charrette Workshop and Concept Plan Presentation and Discussion
- Draft Plan Presentation and Discussion

The Project Team has integrated the results of these interactions into the NewCore Master Plan.

Plan Study Area

Plan Study Area

Existing Conditions

The study area known as the NewCore is located just north of the old Village Center, beginning one block north of the Village Green and bounded by Community, Dundee, Magnolia, McCaskill Roads, and some lands to the north and west along the periphery of this block as indicated on the Land Use Plan. The new governmental “campus” of Village Hall and new public safety facilities is another large block to the north of the NewCore. The entrance to the new Arboretum is just to the northwest of the site. The NewCore lies at the northern edge of the Olmsted-designed portion of the Village.

Physical aspects

The topography is flat to somewhat rolling. A draw which drains the site toward the northwest crosses a portion of the center of the site; the topography in that area slopes downward to this slight valley and toward the northwest corner. The east side of the site is mostly flat and somewhat higher than the west portion. The lowest part of the site is the northwest corner.

Generally, the site contains less vegetation overall than is found in the vicinity and in Pinehurst at large. A stand of pines is in the northwest portion, while pines, magnolias, and other mature evergreen specimens are found in the southeast area around existing office and residential structures. There are some areas overgrown with vines and other vegetation near the vacant steam plant (described below).

Current land use

Both public and private sector functions are located on the site, in buildings and in outdoor areas; some vacant land and unused structures are also present. These land uses include public works offices and staging area, fleet storage and related activities including materials storage; a vacant fire station and training area including a practice tower and storage buildings; ongoing, viable non-retail commercial and residential uses and a resort hotel. In undertaking this plan, the Village has indicated its strong preference that any changes from the current use of private property be made voluntarily by owners.

Structures

Buildings in the NewCore reflect the full range of ages, conditions, and uses found in the Village as a whole – a remarkable assortment dating from the founding of Pinehurst to recent construction. The brick steam plant – also known as the electric plant from its later usage – dates from 1895, which was the earliest year of construction in Pinehurst, while wood frame residential structures may date from the turn of the 20th century to the early-to-mid-1900s. The two-story brick firehouse, a National Register building, dates from 1915. The Manor Inn, a early mid-century resort hotel that continues in active use, anchors the southwest corner of the site. A well-kept but utilitarian metal building of comparatively recent date houses a building supply business at the north side of the study area. Newer construction is represented by a two-story brick office building at the site’s southeastern edge.



In addition to office, resort, and residential structures, other buildings are used for more utilitarian purposes: Sprint maintains a telecommunications facility in a mid-century brick building on the west side of the site, and the Village currently houses its Public Works operations and administrative offices in a number of structures in the northeast quadrant.

Existing on-site conditions



Village's public works staging area



Public works buildings



Firefighting training tower & county water tank



Former rescue squad facility



Steam plant, from the northwest



Sprint telecommunications facility



The Manor Inn

Existing conditions on adjacent lands



Tree-lined path on Magnolia



Magnolia Road north of study area



Auto dealership east of study area



Single-family house south of study area



Victorian cottage west of study area

residences and new office buildings, to well-maintained but utilitarian commercial buildings, to the vacant and partly deteriorated condition of the steam plant.

Taken together, these buildings reflect a remarkable variety of uses and conditions in a fairly small area. Perhaps nowhere else in Pinehurst does such a diverse assemblage of building types, usage, and conditions exist.

Ownership

Approximately one-third of the 19 acres bounded by McCaskill Road, Dundee Road, Community Road, and Magnolia Road is owned by the Village. The Pinehurst Resort is also a major landowner, with parcels including the former steam plant and the Manor Inn. Other landholders include Hughes Supply and various owners of other parcels occupied by individual commercial and residential structures.

Relationship to Adjacent Lands

The site is located in the heart of old Pinehurst, just to the north of the Village core. The site is adjacent to residential property to the west; commercial property and vacant land to the north; and commercial and residential property on the east. To the south lie the Pine Crest Inn and residential sites. The site is not noticeably different in topography or elevation from surrounding lands.

Public open space and community facilities lie very near the site, with the new Arboretum and walking trails under development diagonally across from the site to the northwest, and the Village Hall and additional trails in Rassie Wicker Park within walking distance to the north. Special considerations include the presence of utilities infrastructure – a wellhead and two large storage tanks – on the southwestern part of the site. These facilities are owned and operated by Moore County, which provides water service. The wellhead and storage tanks are in active use.

Market Conditions

Pinehurst and Moore County are well-known as a home to the U.S. Open and major golf resorts that have attracted a large retirement population. However, the area is more diverse and its economy has been influenced by the decline in manufacturing as much as by tourism and accommodation services. Both Pinehurst and Moore County are growing in population, thanks to the area's tremendous appeal as a place to live. Not only golf, but also the quaint villages of Pinehurst and Southern Pines, the year-round climate, and relatively low cost-of-living help attract a growing number of families and non-golfers to Pinehurst.

Demographic growth, as well as the cachet of Pinehurst's name and amenities help propel demand for various uses at the NewCore area. Village retail and office space remains filled, despite operating deficiencies and high rents. Housing development is accelerating and prices are escalating rapidly in the area as a growing retirement population and younger families opt for the amenity value of a Pinehurst lifestyle.

Retail

Retail may be temporarily over-built in the larger Moore County market, but there are opportunities for additional specialty and convenience retail development near the Village Center. The addition of retail space in the NewCore may help attract a more diverse retail and entertainment mix to the area. Among the gaps in the existing retail mix are entertainment venues, convenience goods stores, and other businesses that cater to a more local market.



Typical retail buildings in the old Village Center

Residential

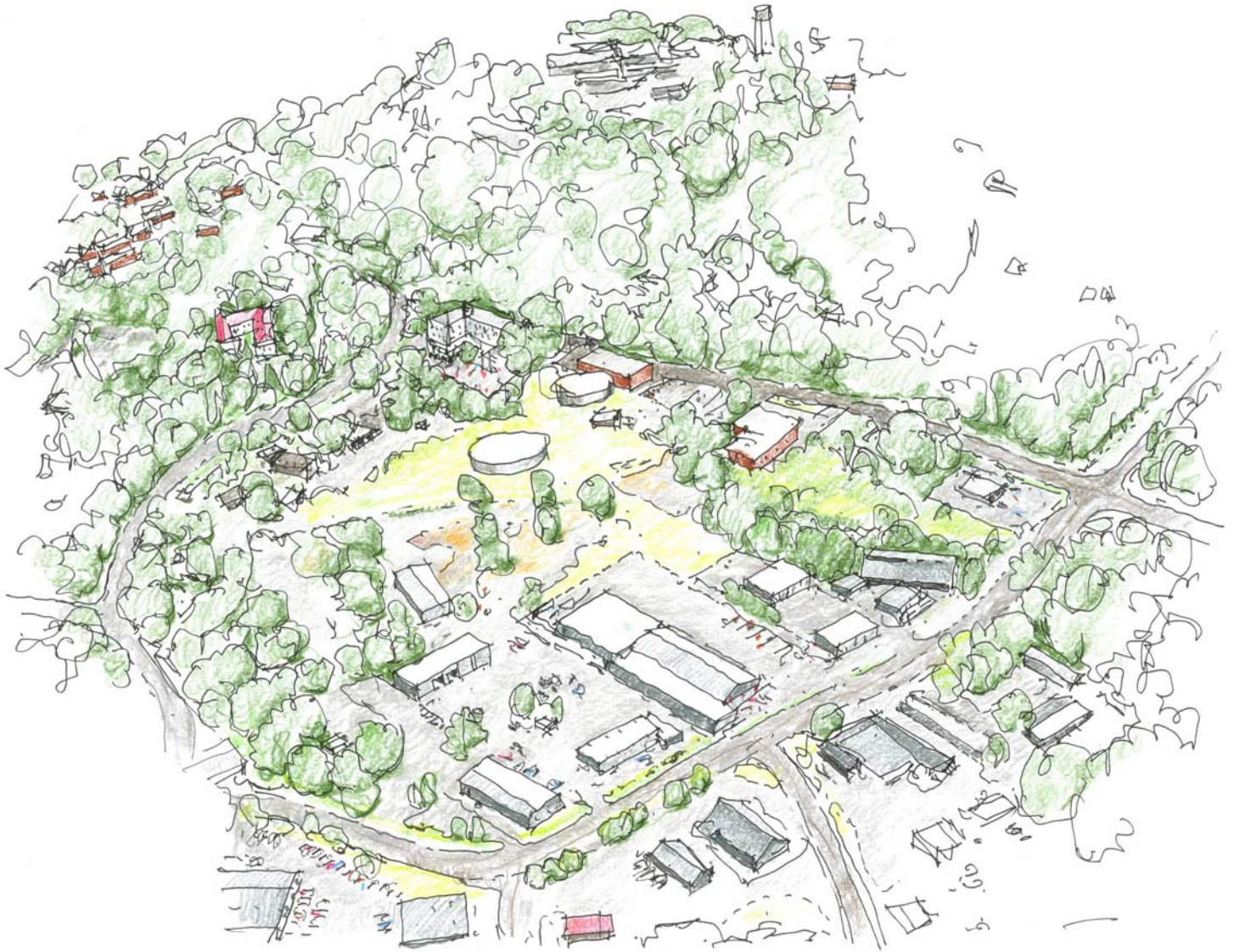
There are also opportunities for residential uses in the NewCore, primarily in the form of zero-lot line or cluster homes including Single-Family, patio homes, and some limited townhouse development. Such housing could be well integrated with retail and office uses, as well as with the existing Village, to create a more enlivened community Village Center. However, privacy is also paramount for residential property owners, so integration of uses must be balanced with the privacy needs of potential residents.



An example of nontraditional higher-density residential development near the old Village Center

Office

Some additional office space may also be warranted, given the occupancy of existing space in the Village and in surrounding commercial developments. The addition of office space in the NewCore may allow some existing businesses to reduce their dependence on first-floor retail space in the Village. There may be demand for more office, but there is a need to ensure balance in the office versus retail uses.



*Aerial view of existing conditions in the NewCore,
looking southwest from a vantage point over McCaskill Road*

Illustrated Physical Plan

Illustrated Physical Plan

Key Concepts and Principles for the Plan

The groundwork laid for the master plan – the background research, the focused review of the characteristics of the existing conditions and history of the study area, the Vision Survey, the market reconnaissance, and the public charrette – generated the essential concepts and key principles that are the foundation of the plan. They include:

- 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 study area and to continue the Village’s interconnecting street pattern
- Clustering retail uses on the southern portion of the study 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 NewCore

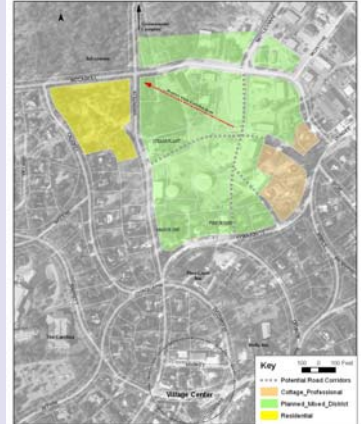
These key concepts and principles are incorporated into the physical plan elements illustrated on the following pages. The elements are illustrated with maps depicting land uses, mobility, public spaces and preservation, as described on the next page.

Following the maps, two key features addressing these essential concepts are described in detail – adaptive re-use of historic buildings, and the role of landscaping and tree preservation in extending the well-loved character of old Pinehurst to the NewCore.

Guide to Plan Diagrams

Land Use Plan

This color-coded “bubble diagram” shows the general location and type of future land use in the NewCore. It was developed based on input by Pinehurst citizens and stakeholders, the market reconnaissance, planned public facilities, and an intensive review of the characteristics of the NewCore study area as well as adjacent areas.



Conceptual Mobility Plan

The mobility plan generally shows new roads and sidewalks and their relationship to the existing system of circulation. The location of streets and sidewalks are conceptually shown.



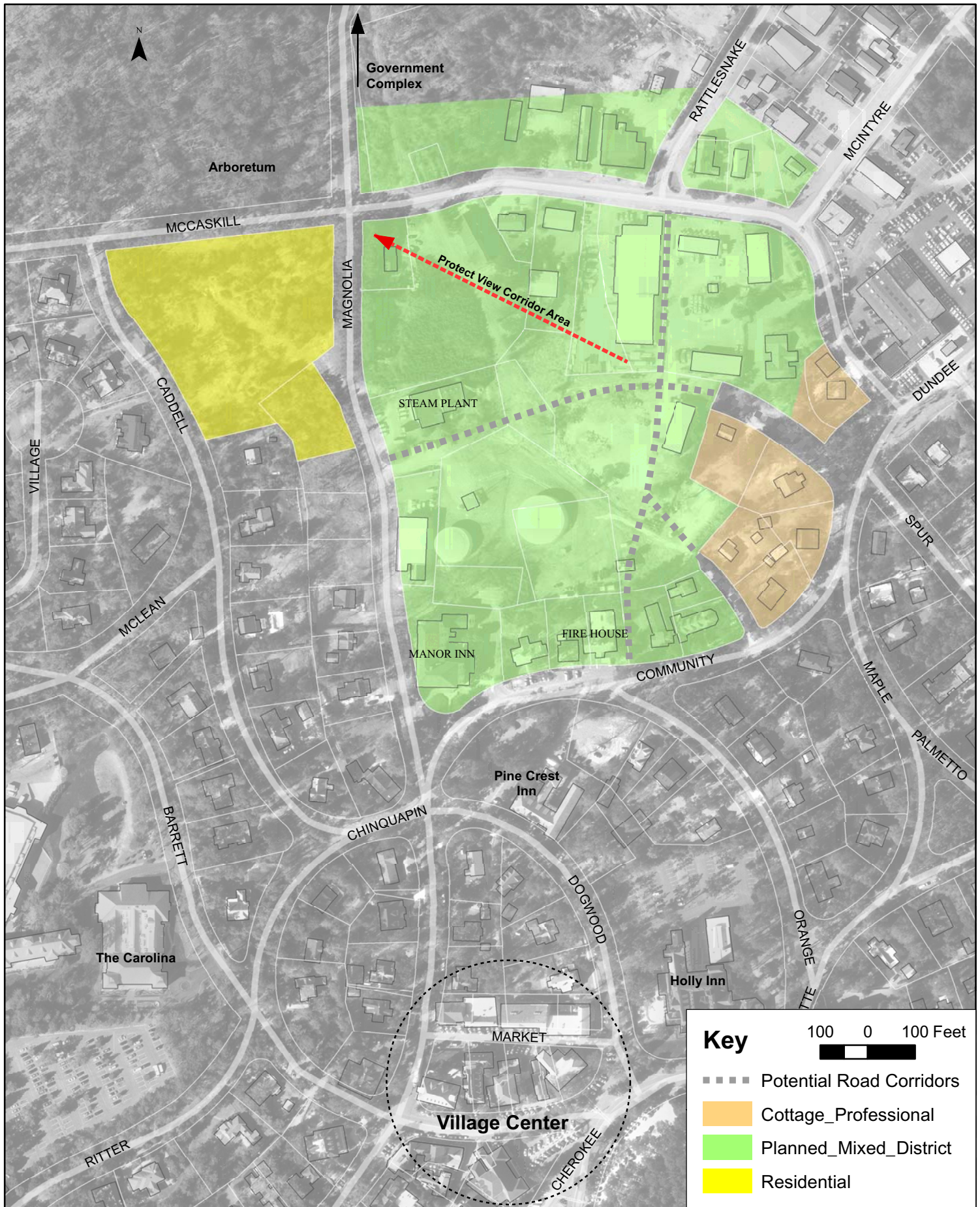
Public Spaces and Preservation Plan

The location of significant public spaces is indicated on this diagram. These include plazas, sidewalks, and public walkways. Also identified are structures that have potential for preservation and adaptive re-use. In the pages following the plan diagram, additional information is provided on elements of particular significance:

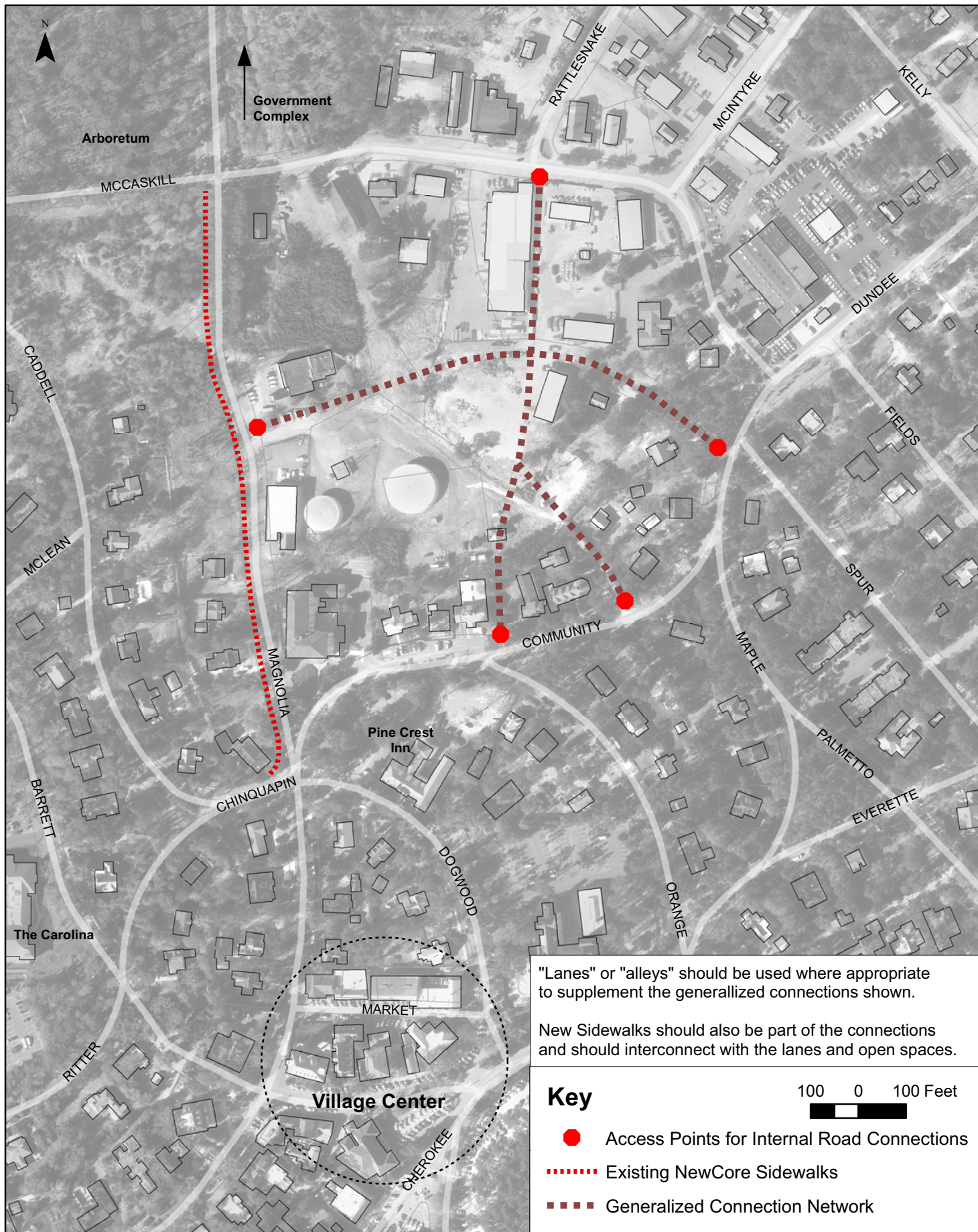
- Rehabilitated Public Buildings: Steam Plant, Firehouse, and Manor Inn
- Veiv Corridor Area



Land Use Plan



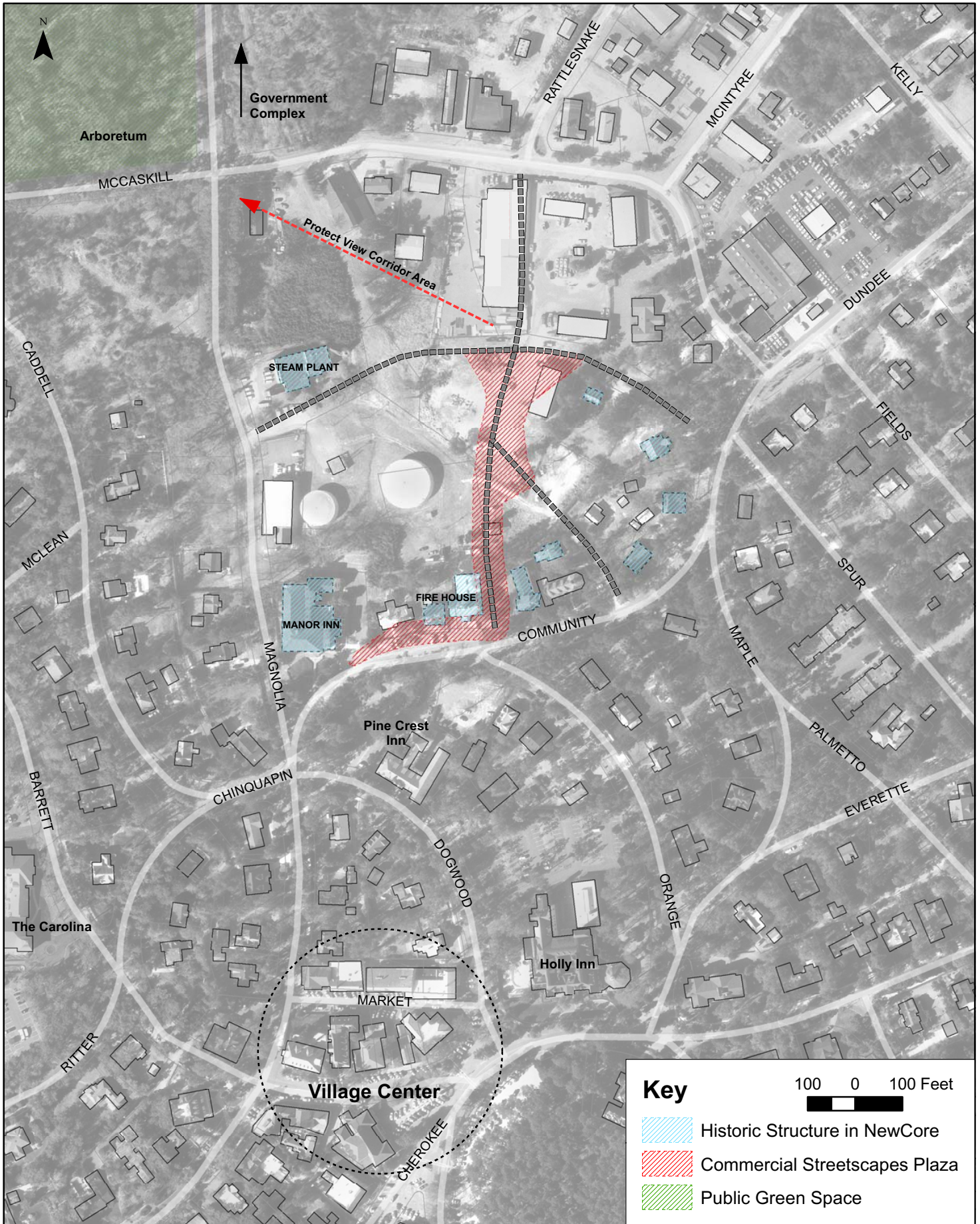
Conceptual Mobility Plan



"Lanes" or "alleys" should be used where appropriate to supplement the generalized connections shown.

New Sidewalks should also be part of the connections and should interconnect with the lanes and open spaces.

Public Spaces and Preservation Plan



A Closer Look at Key Features

Minimizing Tree Removal and Adding New Vegetation

To the new visitor, one of the most striking characteristics of Pinehurst is the lushness and greenery of its landscape setting, even in winter. The original design for the Village was carried out with the installation of thousands of specimens of trees and shrubs. Most or all of the plantings consisted of evergreen species, which gives the Village an inviting, almost summerlike appearance even in the colder months of the year.

Much of the NewCore lacks trees and large shrubs, although parts of the site do contain established vegetation and trees (notably the northwest corner and the southeast side along Community Drive). Those trees that do exist should be retained where possible, especially if they are well established or of significant size.



To augment existing vegetation, additional landscaping will be necessary. The type and quantity of plant material, and its placement within the landscape design, should reflect the characteristics of landscaping in the existing Village Center and nearby residential areas. Specifically, to reflect the existing Village character, new plant material should consist mainly of native species that retain green foliage year-round: magnolias, hollies (such as yaupon and American holly), laurel cherry, long-leaf pines, cedars, boxwood, azalea, and certain oaks. Seasonal plantings (beds, planters, and window boxes) should include colorful annuals with foliage or floral interest.

Streetside plantings should reflect the irregular lines of shrubby trees that are typical along sidewalks and streets in the oldest part of Pinehurst.



Plantings around buildings with yards should include canopy trees, understory trees, and large and small shrubs as appropriate to the site. In areas where there are minimal or no yards, such as residential townhouses and commercial buildings fronting directly on a street, the landscaping should draw on precedent from the Village Center. There, a few large trees shade portions of buildings and the sidewalk, while irregularly placed large shrubs soften the foundations of structures, and bedding plants provide color, visual interest, and a “well looked after” appearance.



Overall, new landscaping should avoid the following characteristics, which would not reflect the existing character of the Village:

- ✗ regimented lines of identical materials (evenly spaced, same-species street trees; rows of identical dwarf shrubs in a monotonous line; rows of foundation plantings)
- ✗ plant materials that present an overly pruned and manicured appearance, or overly geometric/rectilinear design
- ✗ overuse of deciduous species (plants that shed their greenery in winter), except as street trees



Although these street trees in a “main street” setting are attractive, this type of landscaping would be inappropriate for non-commercial areas of the NewCore. The species used here--silver maple--is deciduous, and the plantings are evenly spaced in a straight line arrangement more suited to a typical American commercial street than to a specialty resort community.

New landscaping with the following characteristics would continue the well-loved aspects of the Village Center and the neighborhoods around it:

- ✓ irregular lines or groupings of planted materials, with most specimens grouped in informal clusters or planted off-center
- ✓ canopy trees interspersed at intervals with open lawns or, in shady areas that do not support grass, naturally occurring leaf litter resting on sandy soil
- ✓ plant materials that are allowed to grow naturally into organic shapes reflecting the natural branching character of the mature species (sites that are dominated by plant material left to grow naturally, with only a few clipped/sheared elements, if any; pruning limited to species that lend themselves to that treatment)
- ✓ the use of predominantly evergreen trees and shrubs for a green appearance year-round



These trees and shrubs typify the organic, irregular character of plantings in the oldest parts of the Village, as well as the predominant use of evergreen tree and shrub species such as hollies, magnolias, and azaleas.

Rehabilitated Historic Buildings: Steam Plant, Manor Inn and Firehouse

From the public input received, it was clear that a high degree of support exists for adaptive re-use of historic structures in the NewCore. In particular, the sentiment in favor of preserving and re-using the Firehouse was very high. There was also a fairly strong feeling that, if financially and structurally feasible, the circa-1895 steam plant building should be rehabilitated and re-used. A number of uses for these structures were suggested and, based on the market reconnaissance, have realistic potential for success.

Firehouse

In the case of the firehouse, the building is situated at a focal point near a confluence of streets; with its cupola and arches lending it a formal appearance, it is a civic landmark for many Pinehurst residents. As such, a civic or institutional function would be most appropriate, such as the expansion of the Tufts Archives or public library. Alternatively or in tandem with such a use, it could become a public meeting space or small performance venue.



Steam Plant

For the steam plant, office would likely be the most viable commercial use, based on the results of the economic reconnaissance. The location does not lend itself well to most retail uses because of its location away from other existing or proposed retail areas. However, its size and character does present the potential to sustain a microbrewery and special restaurant / entertainment use, perhaps combined with a performance venue (dinner theater, art-film cinema). It could house a gourmet food shop with a specialty focus and high-end deli or takeout foods.

The background work performed for this plan suggests that the steam plant building may be too large for a community center serving only the immediate area (such as the multi-family housing portion of this master plan), and the financial feasibility of its rehabilitation will probably demand that it serve a for-profit use.



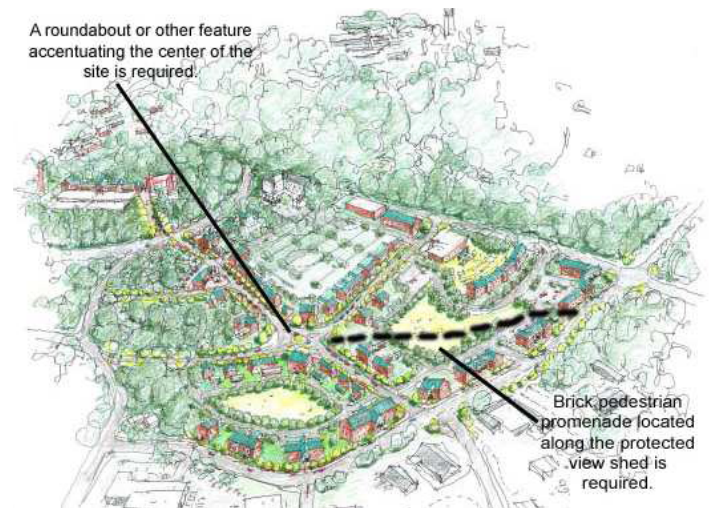
Manor Inn

The Manor is a prominent building located at the intersection of Magnolia and Community Roads. It is the tallest and largest structure within the NewCore area at four stories. The front includes a portecochère which identifies the main entrance. The structure is currently in use as a hotel but would be suitable for re-use. Such appropriate uses would be office and professional or first floor retail.



View Corridor Protection

The purpose of the view corridor is to preserve and create additional emphasis on the view that exists looking from the higher elevation at the southeast portion of the NewCore area toward the northwest portion of the NewCore area and projecting beyond into the Arboretum and Rassie Wicker Park. This will be done by limiting the height and location of structures and land uses within the view corridor. The location of structures on the concept plan are conceptual in nature and may not be allowed as shown.



The well-loved firehouse would lend itself to reuse for a civic or quasi-public function.



The 1895 steam plant could become a specialty retail or restaurant destination.



Architectural and Design Principles

Architectural and Design Principles

Introduction

The physical and aesthetic character of Pinehurst is, for many, the most attractive aspect of the community. Because the NewCore lies in the heart of old Pinehurst, the development of the NewCore has the potential to affect the ambiance of the existing village.

Making sure that this effect is beneficial – that the NewCore contributes to the charm and character of Pinehurst – was perhaps the central mandate that came forward during the information-gathering and charrette components of the master planning effort. The message from participants was loud and clear: maintaining the character of old Pinehurst and extending this same character into all aspects of development in the NewCore is essential to public support for the plan.

The first step in ensuring that this ambiance is continued is to determine what elements of design and architectural character are so appealing to the citizens of Pinehurst. The Vision Survey, described in detail in the process section of this plan, produced measurable data about participants' preferences for design and architectural character.

Using the data from the Vision Survey, along with specific comments and general feedback from participants throughout the public input sessions, the project team created a series of design principles that reflect preferences for new development. Those principles apply to features such as building type, exterior materials, style, and massing; overall streetscape character along with details such as signage and sidewalk materials; "street furniture", such as seating and lighting; and landscaping elements.

On the following pages, the design guidelines and architectural principles are illustrated by example photographs accompanied by textual descriptions for each guideline. Both "appropriate" and "inappropriate" approaches are illustrated for each principle. The pages are oriented horizontally to allow sufficient detail in the photographs.

To ensure that new development and redevelopment are in harmony with these principles, it is recommended that the principles be incorporated into the development regulations applicable to the NewCore and certain key nearby lands. A more detailed explanation of how the design principles would be integrated with zoning and development review processes is contained in the implementation section of this document.

Architectural & Design Principles

No: Inappropriate

Building Height & Setback



Buildings Exceeding Three Stories or having Excessive Front Setbacks or with Front Off-Street Parking: To be consistent with public preferences and historic precedents in the historic village center, buildings in the NewCore area should not exceed three stories in height. Also, setbacks from the street should not be too deep, and no off-street parking should be located between the building and its associated street.

Yes: Appropriate



Commercial and Mixed-Use Buildings up to Three Stories Tall, Shallow Setbacks, and No Front Parking: Commercial and mixed-use buildings in the NewCore area should be one to three stories in height, and they should be located close to the street. Off-street parking should not separate buildings from their streets.



Residential Buildings up to Three Stories Tall, Shallow to Moderate Setbacks, and No Front Parking: New residential buildings in the NewCore area should be one to three stories in height. Attached housing, such as townhouses and apartments, should feature front setbacks ranging between approximately 5 feet and 20 feet, while detached housing can have more generous setbacks. Off-street parking should not occur between the building and street.

Building Scale & Massing



Buildings that are Too Wide or Lacking Façades Massed into Human-Scaled Bays: This building has a very wide façade and fails to achieve the massing that is predominant for commercial buildings in Pinehurst's historic village center. Rather than being broken up into multiple masses, its façade consists of a single uninterrupted plane.



Commercial and Mixed-Use Buildings Massed into Vertical Bays Through Projections/Recesses, Pilasters, Material Changes, Roofline Changes and Canopies: Projecting brick pilasters are capped with a triangular pediment at the roof line to break the building at left into three distinct vertically-oriented bays. The canopies also accentuate façade massing, and the attached building at right projects toward the street, further breaking up the massing of this block.



Residential Buildings Massed into Distinct Vertical Bays Through Façade Projections/Recesses, Balconies, Roofline Changes and Dormers: These townhouses utilize a variety of techniques to create a human scale and massing, including projecting bays and gable ends at both ends of the building, balconies, and dormer windows.

Architectural & Design Principles

No: Inappropriate Facade Design



Façades Lacking a Similarity to Those Existing in Pinehurst's Historic Village Center. This commercial building's scale, massing and setback are appropriate for the NewCore area. However, the façade character is too contemporary, including excessive first floor glazing and balcony railings lacking a traditional design.

Yes: Appropriate



Commercial and Mixed-Use Façades with a Vertical Orientation and Traditional Architectural Elements. Ground floor retail buildings in the NewCore area should feature a traditional storefront design, with a high ratio of glazing. Upper floors should feature less glazing, but a strong vertical orientation for windows.



Residential Façades with a Vertical Orientation and Traditional Architectural Elements. Residential buildings, whether attached or detached, should include a raised foundation and front porches. Even when windows are "ganged" to result in an overall horizontal form, the individual window units should be vertically oriented. Columns, posts and railings should adhere to traditional proportions rather than being undersized, as is often the case with new construction.

Roof Forms & Materials



Residential Buildings Featuring Gable Roofs and Brick or Clapboard Cladding. Gabled roofs should have a minimum pitch of 12:12. Roof materials can be standing-seam metal or shingles of various materials, but shingled roofs should have a dark color. Brick cladding should be limited to attached housing, while clapboard cladding painted white or other light colors should be used for some attached housing and all detached housing.



Commercial and Mixed-Use Buildings Featuring Gable Roofs and Brick or Clapboard Cladding. Gabled roofs should have a maximum pitch of 12:12. Roof materials can be standing-seam metal or shingles of various materials, but shingled roofs should have a dark color. Brick exteriors should primarily feature unpainted red brick, while clapboard sheathed buildings should be painted white or other light colors.



Roofs Lacking a Gable Form and Exterior Cladding Other than Brick and Clapboard. Although a flat roof, parapet façade, and stone or plaster exteriors are appropriate architectural elements in many downtowns, they are incompatible with Pinehurst's historic village center.

Streetscapes

No: Inappropriate On-Street Parking



Head-In Parking: Whether referred to as "head-in", "perpendicular" or "90 degree" parking, it should not occur within the NewCore Area. It is the least attractive option because it places the greatest amount of vehicles between the street and the streetscape, and it is difficult for drivers to negotiate when backing out, making it detrimental to safe driving.

Yes: Appropriate



Angled Parking for Commercial and High-Intensity Areas: Angled parking should be provided for the most commercial and intensive portions of the NewCore Area. In addition to historic precedents for angled parking existing in Pinehurst's village center, it is relatively easy for drivers to negotiate, and it provides more parking spaces per linear foot of street frontage than does parallel parking.

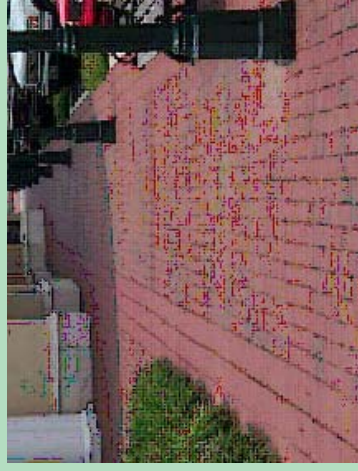


Parallel Parking for Residential and Low-Intensity Areas: Parallel parking should be provided for those areas that are not suited for angled parking, such as residential areas. Such areas do not typically need the amount of parking that shopping areas need, it is the most attractive on-street parking option, and parallel parking is the historically predominant form for Pinehurst's older residential areas.

Sidewalks



Sidewalks Not Constructed of Brick: Based upon public preferences and historic precedents in the Pinehurst village center, any materials other than red brick are inappropriate for the NewCore area's sidewalks. Narrow sidewalk widths within the NewCore area's most intensive and commercial streets are also inappropriate for functional reasons.



Wide Sidewalks within Commercial and Intensive Areas: Wide brick sidewalks should be provided for the NewCore area's most intensive and commercial streets. The outer "utility zone," which borders the street curb and accommodates street trees, lights and furnishings, should be at least three (3) feet in width. The unobstructed "pedestrian zone," located between the utility zone and the adjacent building facades, should be a minimum of five (5) feet in width.



Narrower Sidewalks within Residential and Less Intensive Areas: Narrower brick sidewalks ranging between four (4) and five (5) feet in width are most appropriate for the NewCore area's less intensive residential areas. A landscaped planting strip to accommodate street trees should also be located between the street curb and sidewalk.

Streetscapes

No: Inappropriate Lighting



Tall Street Lights with a Contemporary Character. Excessively tall street lights lacking a nineteenth-century character not unpopular in the public Vision Survey. Such street lights are also inconsistent with the ones existing within Pinehurst's historic Village Center.

Yes: Appropriate



Human-Scaled Street Lights with a Victorian Character. The street lights that consistently rated the highest in the public Vision Survey for this project featured a Victorian character, a height of no more than approximately 14 feet, and included an opaque cap and finial.



Street Lights Located near the Street Curb. In addition to public preferences, there is already a precedent for human-scaled Victorian-style street lights existing in Pinehurst, such as this one. Street lights in the NewCore area should be located near the street curb. For broad sidewalks along shopping streets, street lights should be provided specifically within the "utility zone."

Street Furnishings



Contemporary Looking Benches and Trash Receptacles. This bench and trash receptacle rated the lowest among their respective categories in the public Vision Survey for this planning process. Both have a contemporary character that is distinct from the historic flavor of Pinehurst's existing village center.



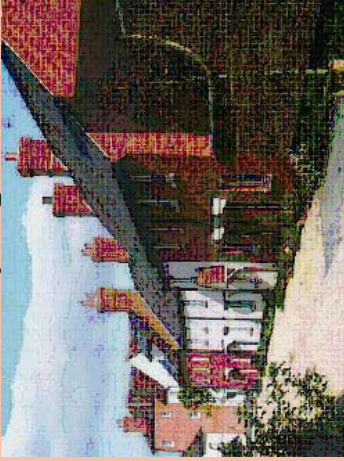
Wooden Benches with a Curved Back and Simple Lines. This wooden bench is located within Pinehurst's historic village center, and it rated the highest among all benches tested as part of the Vision Survey. All benches in the NewCore area should be made of wood, feature a curved back with vertical slats, and exhibit very simple lines.



Dark Metal Trash Receptacles with an Historic Character. Located within Pinehurst's historic village center, this trash receptacle rated the highest among all trash receptacles in the Vision Survey. Trash receptacles in the NewCore area should be made of a dark metal, include vertically-oriented metal slats joined into a circular form, and feature an historic character.

Streetscapes

No: Inappropriate Landscaping

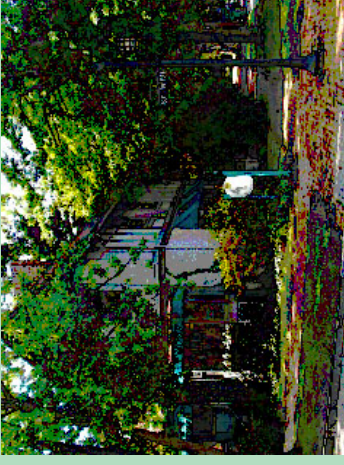


Streetscapes Lacking Extensive Landscaping. Streetscapes lacking generous landscaping are inconsistent with the lush green imagery that defined Frederick Law Olmsted's original vision for Pinehurst. Furthermore, this photograph rated extremely low in the public Vision Survey conducted as part of this planning project.

Yes: Appropriate



Street Trees within Tree Grates on Commercial and Intensive Streets: Even the most urban and dense portions of the NewCore area, featuring the broadest sidewalks to accommodate high levels of pedestrian traffic, should include deciduous street trees to provide color and summertime shade. In order to maximize the sidewalk's surface for walking, tree grates should be utilized rather than planting strips in such areas.



Street Trees within Planting Strips on Residential and Less Intensive Streets: Less intensive and residential streets should feature planting strips located between the sidewalk and street curb for the provision of street trees. Because buildings in such areas should feature a modest front setback from the sidewalk, planting beds and shrubs can also be provided between sidewalks and building facades.

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Transportation and Parking

Transportation and Parking

Overview

The NewCore is envisioned as a walkable community where the needs of drivers and pedestrians are balanced and the streets are shared spaces. Streets within and adjacent to the NewCore will slow and disperse vehicular traffic to provide a pedestrian friendly atmosphere. In conjunction with the Village Center, the NewCore is also envisioned as a “park once” commercial and tourist destination. The two areas are sufficiently accessible to each other to allow visitors to park once and reach all destinations on foot.

The NewCore area was not historically part of the Olmsted curvilinear grid system, in large part because of a railroad spur line bisecting the site from east to west and a second spur further bisecting the northern portion. To reflect this historic context and transport pattern, this plan proposes reusing much of the east-west spur bed as a street. A north-south street reflects in part the second spur, although realigned somewhat to serve as an extension of Rattlesnake.

Regional Connections and Wayfinding

Much of Pinehurst’s charm, ambiance and quality of life stems from its streets being actual streets rather than highways, with the Village Center at a distance from major state and US highway routes.

At the same time, difficulty accessing – and in particular difficulty in finding – both the Village Center and NewCore may be one reason Village Center businesses attract such a small proportion of Pinehurst and Moore County customers. As the 2003 Comprehensive Plan states, travel patterns to the Center are very indirect.

A common response to such “isolation” is to create a wide, straight connection between the highway and commercial district. This approach is inappropriate for Pinehurst for a number of reasons (many of which are outlined in the Comprehensive Plan) but, more importantly, it would not be useful. The Village Center is itself a destination that does not depend on attracting “drive by” traffic and would, in fact, be harmed by it.

Instead, what would be useful to the NewCore is a system to help people easily find their way. A wayfinding system for motorists could be as simple as placing logo signs at or near key intersections, such as NC 211 and Rattlesnake. These should be based on designs selected

in the recent signage plan indicating the Pinehurst identity as well as that of the NewCore. Smaller versions designed for pedestrians can be used to help visitors find their way between the Village Center and the NewCore.

Another beneficial approach is route simplification. Extending Rattlesnake Road to Community Road would improve access generally in and around the Village Center as well as within the NewCore.

The Village website should offer downloadable, printable maps which clearly illustrate applicable routes from highways to the NewCore, resorts and other major destinations. The Village, the Chamber of Commerce or other interested group may wish to ensure that Internet mapping services and Geographic Positioning Systems (GPS) providers are giving travelers the proper route information.

Village Connections

Although the streets at the perimeter of the NewCore have long been part of the Village, the utilitarian nature of much of its area and the lack of internal streets have made it something to be driven around, rather than driven to or walked through. However, adequate external street connections do exist from NewCore to the rest of Pinehurst. Sidewalk connections are another matter. Only two peripheral streets have sidewalks at present. The recently installed sidewalk bordering Magnolia is on the opposite side of the street from NewCore. Along Community Road, the path is incomplete and inadequate, and is disconnected from the Magnolia sidewalk and the Village Center sidewalk network, due to its location on only the NewCore side of the street.

Recognizing the inadequacy of these pedestrian facilities, the Pinehurst Comprehensive Plan places NewCore within an area proposed for brick sidewalks “of generous width.” These planned walkway connections between the Village Center, NewCore, Arboretum and Town Hall Complex are essential to help knit the area together.

Another important element strengthening pedestrian connections is to link planned brick sidewalks in and around the NewCore to the new greenways within Rassic Wicker Park, as well as to the residential areas within one-quarter mile of the NewCore perimeter.

Connections Within the NewCore

The interior of the NewCore should be made more accessible by new streets. One running north-south would be formed by extending Rattlesnake south to connect with Community Road. The other will reuse the former site of the east-west railroad spur to provide a cross axis with the north-south street.

Rattlesnake is designated as a collector street but generally fails to adequately connect the Village Center with NC 211 because of excessively indirect routing. As noted earlier, extending Rattlesnake to Community should enhance accessibility for both the NewCore and the Village Center.

Extending Rattlesnake will also serve to create smaller, pedestrian-friendly blocks within the NewCore.

The Spur Extension will be a local street rather than a collector, but it too will help create smaller, pedestrian-friendly blocks, while also providing on-street parking. For much of its length, this street will follow the old railroad spur alignment. Its western segment, however, will curve south of the Steam Plant building to intersect with Magnolia.

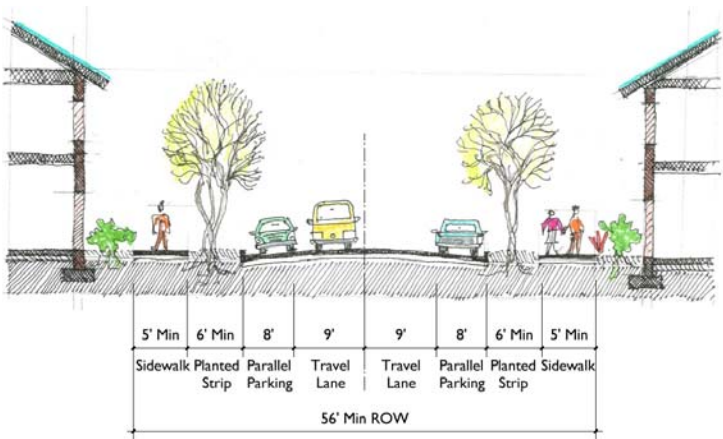
Lanes will provide access to internal parking areas inside the blocks formed by the new streets. Lanes are very low speed streets shared by both motorists and pedestrians. They provide off-street areas for delivery vehicles and garbage trucks, eliminating unsightly disposal and service areas along the street fronts. They also allow multiple access routes for fire trucks and other emergency response vehicles. Internal lanes also eliminate much of the need for individual driveway curb cuts, reducing conflicts with pedestrians and bicyclists.

Sidewalks and Paths

A high degree of pedestrian accessibility will be critical to the success of the NewCore. Extensions of both Rattlesnake and portions of Spur will have sidewalks along both sides. Magnolia, McCaskill and Community should have sidewalks along both sides, where practicable, and along the NewCore perimeter at a minimum.

Consistent with existing sidewalk policies, sidewalks along both sides of Community west of Orange are also needed to enhance the existing connection. At the site planning stage, opportunities for paths in addition to sidewalks along streets should be created. Paths between buildings can provide additional pedestrian linkages between internal parking areas and shopping streets. Such paths not only shorten walking distances between destinations but help reinforce the human scale of NewCore, just as they do in the old Village Center.

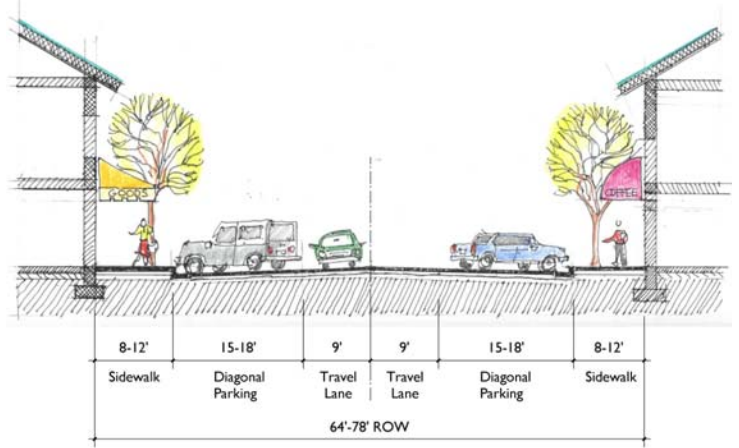
The Comprehensive Plan places most of the NewCore site within the area designated for brick sidewalks. All sidewalks within and adjacent to NewCore must be a minimum of 5 feet wide in order to comply with ADA requirements. Further, all sidewalk curb cuts must be properly ramped, have tactile warnings and otherwise accommodate disabled users. It should be borne in mind that such accommodation really is about universal design. Ramps that aid those in wheelchairs also help parents with strollers and delivery personnel, and people with visual or mobility limitations.



Street section at less intense uses

Within residential and less intensive mixed use areas, a planting strip of at least 6 feet should be installed to help buffer the sidewalk from the street. Vegetation typical of that found in old Pinehurst should be planted within these landscaped strips. To maintain sight lines, trees and other streetscape elements should be restricted from corners for distances of 30 feet on all sides. Also, to accommodate pedestrians, the area between 2 and 7 feet above ground should be maintained as a clear zone wherever on-street parking is located and in commercial areas. Street trees should also be carefully located so that they frame businesses rather than reduce visibility of doors and signs.

Gutters, curbing, and related infrastructure should be installed in accordance with the Village’s engineering standards for non-residential areas in Old Town.



Street section at more intense uses

Within the more intensive use areas, where on-street parking is extensively used, the area behind the curb should be bricked to provide access between the street and sidewalk. Street trees in these areas are planted within tree wells and integrated into the sidewalk with tree grates. This “utility zone” is generally about 4 feet wide. The unobstructed area of the sidewalk itself should be at least 8 feet wide and may need to be 12 feet or wider if space for sidewalk dining, outdoor display of merchandise or similar uses are desired.

Street engineering and design

Within the NewCore, design speeds should closely match the street type, vehicle use and the proposed speed limit. Within NewCore streets have a desired upper limit of actual vehicle speeds of approximately 20 to 25 mph. Internal access lanes should be in the 10 to 15 mph range. Most streets should have lane widths of about 9 feet with an additional 6 feet for parking and 2 feet of gutter. Lanes are commonly about 20 feet wide with 10 to 14 feet of pavement.



An internal lane in the old Village Center leads to service areas in the interior of the block

Rattlesnake Extension appears likely to have both horizontal and vertical curvature considerations that must be taken into account during design. Stopping sight distances and other considerations may require lane widths of up to 11 feet. To calm traffic while reducing pedestrian crossing distances, curbing may be extended up to 4 feet beyond the gutter at crosswalks. Such curb extensions or “bulbouts” make it easier for pedestrians to see and be seen in areas with on-street parking.

Curb radii for intersections with driveways and lanes should be about 15 feet. To keep design speeds low and pedestrian crossing distances manageable, a maximum curb radii of 25 feet is recommended for larger intersections. However, the Olmsted street design in the old Village uses very generous curb radii, so a balance should be maintained between historic context and modern traffic calming techniques.

The scale of lighting fixtures and the illumination provided must be appropriate for both pedestrian and vehicular movements. More and shorter lights are preferred to fewer, taller, high-intensity lights. Pole lights for pedestrians are seldom taller than 14 feet as lower fixtures minimize shadowed areas lighting may also be attached to buildings within higher intensity areas.

On-Street Parking

Within the most intensive areas, angle parking provides more parking per linear foot of curb than parallel. Angled parking is also preferable for high turnover parking as it is faster and easier for most drivers. Many advocates think angled parking is also safer for bicyclists because drivers tend to back up more cautiously as compared with how many pull forward out of a parallel space, and because the chance of being “doored” is eliminated.

In residential and less intensive areas parallel parking should be provided. It is space-efficient and minimizes impervious surfaces. In addition, parallel parking is the historically predominant form of on-street parking for Pinehurst’s older residential areas.

Within all newly developed areas of NewCore only angled or parallel parking is proposed. However, a segment of Community currently uses 90 degree or “head in” parking. This may be retained if it does not negatively impact safety. Observation indicated that a sizable portion of customers using this parking were traveling from Magnolia, so that a left turn into head in parking is preferable to a U-turn to access angled parking. Once Rattlesnake connects with Community it is possible that more drivers will arrive from the opposite direction and this change, along with additional traffic, may warrant conversion to angled parking.

Off-Street Parking

All NewCore areas to be redeveloped will contain some degree of off-street parking hidden within the interior of the newly formed blocks. North of Spur, these areas are designed as “parking lanes” with garages, carports and surface spaces directly abutting the internal accessways.

South of Spur, a larger surface parking facility is proposed in the interior of the southwest block. Roughly half of this parking would be paved, while the other half would be some form of “green parking”, with stabilized pervious surfaces, not necessarily pavement.

The purpose of this large parking area is to provide additional parking for the Village Center, for hotel guests and for special event parking. When the overflow parking is not needed, the green parking area in particular could also be used to host events, such as a farmers' market.

Implementation

Implementation

Strategic Recommendations

Based on the review of market conditions and opportunities, it is highly recommended that the NewCore area function as an exciting, mixed-use extension of the existing core. Businesses and residents would be attracted to this area in order to benefit from the proximate location and positive image of the existing core, but also to take advantage of new, larger, and more diverse building formats than are presently found in the core.

Concept and mix

The NewCore would include local-serving, and specialty retail, restaurant, and entertainment uses. These uses would extend from the existing core and would be located in walking distance to new housing, such as patio / cluster homes and townhouses oriented to both retirees and younger pre-retirement residents. Office space would be developed within this mixed-use commercial/residential area to house professional services, general offices, and real estate companies that would gradually expand or relocate from first floor spaces in the existing core. The area would be complemented and integrated by a series of walkable streets, pathways and open spaces. Together, the existing village and new core areas would form a stronger and more economically viable village center for the growing community of Pinehurst.

Design and land use implications

In order to maximize the marketing opportunities for the area and meet the expectations of existing and potential residents, the unique physical environment and architectural heritage of the existing village core should be extended seamlessly into the new core. Again, the unique heritage and lifestyle of Pinehurst create a strong “brand” that establishes its appeal as an attraction for residents and visitors alike. So, this brand should not be compromised through design, density, or development patterns that are wholly inconsistent with the original Olmsted plan for Pinehurst.

Mixed Use Area

The mixed use area when fully developed shall be comprised of a minimum 45 percent open space. It shall also be comprised of between 25% and 35% retail and entertainment uses to include restaurants. Residential uses shall comprise between 35% and 45%. Other uses including office and professional shall comprise between 25% and 35%. These figures shall be calculated based on total building area.

Mixed uses and other strategic recommendations are more fully detailed in Appendix A: Market Reconnaissance Report.

Cottage Professional and Residential Area

The areas when fully developed shall contain a minimum of 45 percent open space.

Development implementation

Implementation of the master plan and associated concepts must be understood in terms of the overall development management structure, and associated phasing and financing strategies. There are basically two distinct options for managing redevelopment within the NewCore area, as discussed below. One option is for the Village to allow individual developers to gradually submit plans in a “piecemeal” approach for development of parcels in the NewCore area. If developed in this manner, the percent of uses shall be maintained on each parcel of land or development proposed. A more unified option is for the Village to seek a Master Developer to ensure consistent implementation of the community’s master plan.

There are benefits to both approaches for implementation of the NewCore master plan. In a reactive, parcel by parcel approach, development of the area is more likely to occur gradually over time. The Village is less likely to expose itself to any financial risks. However, the individual developer approach does risk creating a less integrated development pattern that does not conform to the community’s vision for the NewCore area. That approach

also makes it harder to finance the large-scale infrastructure improvements that are proposed for the NewCore area, including the extension of roads and urban design improvements, as well as the parking facilities. If those improvements are financed privately, there is the possibility that developers will need to increase densities, alter the land use mix, and raise prices in order to recover those infrastructure costs.

The master developer approach is more efficient. It provides economies of scale that help ensure development is more consistent with the community's vision. A master developer approach also reduces the cost of assembling land because individual property owners become part of a larger negotiation. The Village adds value to the redevelopment process by helping to bring the property owners to the table in a public-private partnership that they help create and from which they benefit.

A master developer-led process would probably ensure more rapid redevelopment within the NewCore area, which is something that the community may not inherently want. However, the community may also be more likely to achieve the objectives of their plan if implemented sooner. The trade-offs between timing, financing, and consistency with the community's vision must be addressed when contemplating an appropriate development policy for the NewCore area.

Public Policy Recommendations

Directing public policy toward achieving plan goals is a central component of implementing any plan. Decisions involving local government public policy can include capital improvements planning and programming, recruiting a master developer, budgetary decisions, and land development regulation including zoning and development review. Much of the structural development envisioned for the NewCore in this Master Plan remains to be accomplished. Because the future built environment

is so central to the plan, a major component of plan implementation will be the adoption of appropriate zoning and related development standards for the NewCore. These are described in detail below.

Zoning

As revealed in this plan, the community's strong preference is continue and extend the general character of the Village Center into the NewCore, while incorporating additional uses that appear to be in demand, such as office space and alternative forms of housing, into the mix. With this overarching vision in mind, the zoning strategy for the NewCore should be designed to achieve the following key goals:

- It should allow a mix of uses in the NewCore as envisioned in this Plan, and must accommodate those uses with some flexibility as to their exact location and intensity based on market requirements.
- It should direct retail uses toward the southern edge of the NewCore (which is close to the Village Center) so as to enhance and strengthen the retail use of the existing Village Core, rather than competing with or undermining it.
- It should allow existing uses and buildings to remain in operation until tenants or owners are prepared to make alterations in the use and development of those properties.
- It should be able to fit reasonably within the existing structure of development regulation and review used by the Village, without creating a need for new review processes or reviewing entities.
- It should allow the Village to retain guided control over new development proposals, including their context, form, and compatibility, yet it should not put staff in an untenable position of making discretionary judgment calls, and it should not introduce an unmanageable degree of uncertainty into the review process for development applicants.
- It should, if at all possible, allow checkpoints and assurances for a true mix of uses and prevent the "picking and choosing" of development types in such a way that only one or two use types are ever built on the NewCore site.

Currently, the NewCore and certain key nearby lands are predominately zoned NC, with some smaller areas zoned O (Office), H (Hotel), and R (Residential). The existing zoning is not designed to achieve the goals outlined above and described throughout this Master Plan; in many respects, it would allow or promote development that is incompatible with those goals. The zoning treatment of the plan area and key nearby tracts should, therefore, be updated with a revised approach.

Recommended zoning approach

An approach that would meet the goals outlined above is to create a new zoning district tailored specifically for the NewCore area. The zoning district, to be placed on the NewCore site, would permit a mix of uses and would also include specific urban form and architectural standards to ensure that development takes the appropriate form. A market reconnaissance, and not a full-fledged market study, was performed as part of the foundation for the plan; the plan is market-informed rather than market-based. As such, the zoning implementation of the plan should avoid overly specific prediction of where different uses should go on the overall site. With the retail component of the NewCore focused at its southern edge, that edge will function more as an extension of the old Village Core and strengthen, rather than detract from, the retail shops and restaurants in that area.

Uses allowed in the NewCore district would include residential uses, taking the form of zero-lot-line, patio, and cluster housing, townhouses, and assisted living or retirement residences (but not nursing care facilities); commercial uses such as professional offices, financial institutions, and perhaps entertainment venues and restaurants.

Additional uses allowed in the NewCore district would include specialty and local convenience retail, restaurants, lodging and accessory to existing visitor accommodation uses. Buildings could be vertically mixed in use, but retail or restaurant space should occupy ground floors in any case. Retail on ground floor of any office building, for example, would be consistent with the vernacular pattern in the old Village Center. The proposed zoning district shall have language to ensure that uses are located in accordance with the Land Use Map within this document.

Development standards

The new zoning district should include standards to address special considerations of development quality described throughout this Master Plan. As detailed in the Architectural and Urban Design Principles section of this plan, new development should have to meet clear standards such as height limits, building massing and articulation requirements, and roof pitch; landscaping and streetscape elements; and other such matters. The specific standards that are drafted should reflect the goals in the illustrated photos in the section on Urban Design, Architectural Character, and Streetscapes.

Additional requirements should include screened service and waste collection areas located to the rear of buildings and limited setbacks to bring buildings close to the street, where appropriate. The standards should encourage “friendly” optional elements on the public street frontage such as seating, entry courtyards, arcades, bike racks, and walkways.

Other standards applied in the new districts would be related to parking and always a factor to be handled thoughtfully in site design because of its impact on urban form. Surface parking lots would be allowed as accessory uses, but must meet certain criteria (situated behind buildings and accessed by alleys, rather than fronting on a public street, for example). Off-site parking should be allowed to meet a portion of the parking requirements of specified certain commercial uses; this would enable businesses to meet part of their parking needs with spaces in the surface lot located within the southwestern quadrant – perhaps on a fee-in-lieu-of-construction basis. On-street parking should also be counted towards parking requirements for at least some uses.

Process for review

Within the new district, the existing process of site plan review and special use processes and approval (by the Planning and Zoning Board or by the Village Council, respectively) would allow representatives of the Village to retain some discretion over the quality and context of new development proposals. The reviewing body would generally be able to evaluate sites to be developed on the basis of compliance with the goals of the Master Plan. The site plan review process will ensure that Planning and Zoning Board or the Village Council has the opportunity to review and evaluate development proposals for their compliance with plan goals. Once the new districts and accompanying standards are

prepared, the Pinehurst Development Ordinance (PDO) would be revised to include them.

After the amended ordinance text is adopted, the specified lands in the plan area should be rezoned as appropriate.

Going forward

Existing development not consistent with the new zoning will remain as lawful nonconforming uses to ensure that property owners are not forced to alter ongoing activities on their land. The new district would apply a standard approach to legal “nonconformities”: existing uses and buildings that would not be permitted under the new zoning, may nonetheless remain in operation. Doing so will meet the Village’s stated goal of allowing the development of the NewCore to proceed incrementally over time without forcing existing uses to undergo premature change. As private tracts or parcels within the NewCore are voluntarily brought forward for site plan review and approval, the standards in the PDO and the principles of the NewCore Master Plan will be applied to the form, type, and use of development. Over a period of time the NewCore will tend to reflect more and more the vision for the area articulated by the public in the planning process.

When each property develops according to the overall plan, the value for all property owners is increased overall, as opposed to fragmented attempts to maximize individual value that often have negative effects on other properties. Thus, if zoning standards and review processes are properly formulated, the value of the NewCore lands is maximized, both for individual property owners in and around the plan area, and for the public at large in Pinehurst.

An alternative zoning scenario

As an alternative to the new base zoning districts and incremental implementation described above, the Village could choose to seek out a master developer for a larger overhaul of the NewCore area pursuant to the strategy described in Appendix: Market Reconnaissance Report. Under this scenario, the developer would seek a conditional use rezoning for all the land under its control.

As it is applied in North Carolina, conditional use zoning allows the Village to negotiate flexibly with a developer or its representative when a development is proposed. It can be used as a means to assure the quality and form of new development through the application of standards, plans, and conditions on a specific property that is proposed for rezoning.

The conditional use rezoning process allows Pinehurst to find ways to address the public interest; in this case, the Village would measure the proposed development against the goals contained in this Master Plan. The Village's decision makers could suggest conditions and standards that, if voluntarily agreed to by the applicant, would apply to all development going forward under the rezoning.

In effect, the conditional use rezoning procedure blends, in the consideration of one proposal, a conventional rezoning process with the review of a special or conditional use permit. The types of features that can be controlled using conditional use zoning include:

- Site design restrictions and requirements
- Requirements that the developer construct or pay for the construction of public off-site improvements
- Locational standards for building placement and access point location
- Landscaping, lighting, and parking
- Use of structures and land
- Construction of street improvements or other additions to infrastructure

The conditional use zoning approach can only be used with a master developer, because by statute the property owner's consent is required for a rezoning to a conditional use district. This constraint of conditional use zoning is offset by a number of advantages. First, conditional use zoning can be used to manage a range of very different uses and development types – such as housing, retail, and offices – on one unified site, without requiring staff to draft (before a proposal even comes forward) a base by-right zoning district encompassing all possible uses. With a master developer and conditional zoning, phasing plans could be employed to ensure that the developer does not abandon the rest of the project after achieving buildout of just one profitable element of the overall plan. Also, conditional use zoning allows an overall proposal to be judged flexibly by its conformance with the goals of the Master Plan, and it allows the Village to suggest additional conditions to the development applicant to address specific concerns of public interest.

Implementation Considerations

Implementation strategies span the range from broad, proactive approaches to more measured actions that are generally protective of the Pinehurst culture. A broader approach would be more likely to result in the articulated community vision and an extension of the existing Village Center.

Opportunistic recommendations

A unique opportunity exists for the Village to not only define what may be built but also lead NewCore's development and produce the community's vision. The Village owns approximately one-third of the NewCore area and is relocating the Fire Department and, potentially, the Public Works facilities. The soon-to-be-abandoned Firehouse is prominently located at the intersection of Community and the extension of Rattlesnake along the commercial corridor that links the NewCore with the Village Center. And, more importantly, the primary transportation corridor (extension of Rattlesnake) and focal point of the commercial area (the "Y" intersection of Rattlesnake and Power House Roads) is also located on Village property.

The Village could pursue the master developer strategy. (Refer to the sidebar in the next column.) An alternative Village strategy is to promote NewCore development by focusing specifically on the Village's land. Though this is a proactive approach and results in the development of one-third of the site, it leaves future parcels development and timing to individual landowners and market conditions and a more likely piecemeal buildout. In either alternative, the infrastructure improvements would be constructed, though in the latter alternative, buildout would likely occur over a longer timeframe.

Other actions the Village may undertake that would promote the Plan include encouraging the relocation of historic residential structures to the southeast quadrant of NewCore to preserve housing stock, maintaining the historic architecture, augmenting the pedestrian experience and residential character along Power House and Spur Roads, and assisting the owner of the steam plant in completing an economic analysis to better understand the viability for adaptive reuse of that structure.

Extending and Enhancing the Village Center Character

Objective: The most consistent theme arising from the interviews, workshops and public meetings was that the redevelopment of the "old service area" must be consistent with the existing form and character of the Village Center and maintain its sense of place. The approach most likely to achieve this critical community objective is a unified strategy in which the owners of property targeted for redevelopment work with the Village as landowner and spokesperson, and the community, represented by the Village Council, carefully selects a qualified master developer committed to the community vision and the master plan design.

Landowners: Property rights are important, and a unified approach best addresses these interests. In simple terms, the NewCore as planned will have a higher economic value than the old service area as currently developed and, therefore, all the land will be more valuable if the master plan is successfully implemented. The chances for successful implementation are greatly enhanced if the property owners act in concert using the Village as lead. Though property owners' needs and concerns will vary, individual interests can be addressed through a joint effort among property owners and the Village.

The Village: The Village has had the foresight to understand that this area is on the point of transitioning from its historic role as a location for service uses and into something else. By initiating this planning process at just the right time, the Village has been able to capture the community's vision and reinforce it with good planning principles to produce an encompassing and economically viable plan, defining what that "something else" should be. The Village can best satisfy the interests of its citizens and property owners by ensuring that the old service area be developed consistent with the vision expressed by the community in the plan. Acting on its own behalf and that of the other property owners, the Village has the breadth of influence to attract a qualified master developer, whereas this synergy is not possible with any individual parcel.

Master Developer: Developers are interested in predictability, which includes matters such as getting zoning approvals, having adequate infrastructure available, making sure that development is economically viable in the market, and knowing the potential impacts of subsequent development on adjacent lands. The more a developer can increase predictability and minimize or eliminate concerns around each of these issues, the more interested the developer will be in a given opportunity. As a result, the land in question is likely to fetch a higher price, and the developer will be more willing to negotiate providing infrastructure improvements and public amenities. When there is strong interest in a development opportunity, it puts the Village in a better position to choose a master developer and architect with a proven track record and carefully vetted for sensitivity to the Village's original Olmsted design and character.

The Community: Community visions are not created on their own. They are planned, planted, nurtured, and protected. The history, aura and ambiance of the Village Center did not just happen. Olmsted envisioned it and Tufts built it. Pinehurst Resort protected it for many decades, and for the last 25 years the community, through the incorporated Village, has nurtured it. The question now is what degree of effort the community wants to expend to guarantee the extension and enhancement of the character of the Village Center into the NewCore.

Well and water storage tanks

In the southwest corner of the Study Area the County maintains two ground water storage tanks and an active well. The well pumps water to the storage tanks and the water in the tanks is then pumped to raised storage facilities. Though the East Moore Water District expansion will increase the capacity of the current water system, there are no County plans to abandon the well or storage tanks on the site. The Master Plan delineates a combination of permanent parking in support of the commercial uses along the streets, along with a green, pervious surface area for outdoor community events and special events spillover parking.

The primary obstacle to interim use of this property is the active status of the well and the applicable regulations that exclude uses within a 100-foot radius of an active wellhead. The Village should consider pursuing a strategy with the County to negotiate the abandonment and relocation offsite of the wellhead. This could allow a number of uses such as community events and consumer parking. Though the eventual removal of the storage tanks is necessary to maximize the use of this area, the elimination of the well would be a significant interim step.

Adaptive reuse of the steam plant

The decision to adaptively reuse or raze the steam plant should be based in part upon economic considerations – the projected economic value of the intended use in relation to the cost of renovating the structure versus the cost of demolition and new construction. The creative application of state and federal tax credits (40% total) in conjunction with preservation remediation requirements may produce a favorable restoration analysis. In addition, there is the intrinsic value added by a unique historic structure that can help create special appeal and character in the NewCore. While difficult to quantify, this value is arguably one of the strongest reasons for considering the restoration and re-use of this building that dates to Pinehurst's founding.

Minimum recommendations

The following recommended actions constitute the minimum necessary to begin implementation of this Master Plan.

- Incorporate the Plan into the Village's Long Range Comprehensive Plan and modify the Village's Development Ordinances (as recommended in the public policy section of this Plan) to provide for land uses and design standards articulated herein. This provides a level of certainty to developers that proposed projects in compliance with zoning requirements and design standards will be approved. Further, this may spur interest in the two-thirds of the Study Area that is privately owned and underutilized.
- Begin negotiations with the County regarding abandonment or relocation offsite of the wellhead, interim uses of the County's land and the potential removal of the storage tanks.
- Develop, approve and implement a plan to construct the infrastructure improvements.
- Pursue an interested party to adaptively reuse the Firehouse consistent with the recommended uses listed in the Illustrated Physical Plan Section.

Implementation Matrix

An Implementation Matrix beginning on the next page contains recommended actions to carry out the goals and objectives of this Master Plan.

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NewCore Master Plan Implementation Matrix

This matrix will guide the implementation of the Plan. In general, the Plan should be used as a guide by which to evaluate proposed actions and activities, referring to specific plan sections as appropriate.

| Policy-Setting and Regulatory | Public Infrastructure | Private Development | Miscellaneous |
|---|--|---|--|
| <ul style="list-style-type: none"> • Adopt and incorporate Master Plan into 2003 Comprehensive Long-Range Plan | <ul style="list-style-type: none"> • Develop and approve Capital Improvement Plan for infrastructure requirements of Master Plan • Include scope, timing, and financing • Streets: roads, lanes internal to blocks, sidewalks, lighting and landscaping • Utilities: water, sewer, electric, gas (phone and cable?) • Surface parking • Wayfinding signage • Implement Capital Improvement Plan • Subject to and aligned with private development strategy | <ul style="list-style-type: none"> • Assess and approve implementation strategy for private redevelopment consistent with Master Plan focusing on one of two strategies: • I) Master Developer – Village leads redevelopment effort among willing landowners and selects a single master developer • II) Village Land (only) – Village contracts with developer to develop the Village’s land; and • II) Private Land – Landowners independently submit development plans pursuant to amended Pinehurst Development Ordinance | <ul style="list-style-type: none"> • Develop and implement unified Wayfinding / Signage Plan consistent with recommendations of Master Plan including: • web-based resources: Village website, internet mapping providers, GPS providers |
| <ul style="list-style-type: none"> • Amend Pinehurst Development Ordinance pursuant to Master Plan, to include: • Zoning • Architectural and urban design standards • Landscaping standards | <ul style="list-style-type: none"> • Pursue interim and long-term plans for Moore County abandonment and removal of well and water storage tanks • Interim – abandonment and removal of wellhead • Long Term – abandonment and removal of storage tanks | <ul style="list-style-type: none"> • Pursue adaptive reuse opportunities • Obtain private developer for redevelopment of the Firehouse • Assist owner of Steam Plant in reuse assessment for the Steam Plant • Encourage reuse of existing structures in southeast quadrant | <ul style="list-style-type: none"> • Request and obtain landmark status for qualifying structures and erect plaques designating status and year built |
| | <ul style="list-style-type: none"> • Relocate Village Public Works | <ul style="list-style-type: none"> • Encourage relocation of historic structures in southwest quadrant to southeast quadrant | <ul style="list-style-type: none"> • Establish periodic review of Plan implementation consistent with 2003 Comprehensive Long-Range Plan |

**NewCore Master Plan
Implementation Schedule**

| Category / Activity | Responsible Parties | Year | Term |
|--|---|-----------------|----------------------|
| <u>REGULATORY</u> | | | |
| <ul style="list-style-type: none"> • Adopt and incorporate Master Plan into 2003 Comprehensive Long-Range Plan | Village Council Planning Commission Steering Committee | 2006 | 1 – 2 mo |
| <ul style="list-style-type: none"> • Amend Pinehurst Development Ordinance pursuant to Master Plan, to include: <ul style="list-style-type: none"> • Zoning • Architectural and urban design standards • Landscaping standards | Village Council Planning Commission Planning Department Staff | 2006 | 4 – 6 mo |
| <u>PUBLIC INFRASTRUCTURE</u> | | | |
| <ul style="list-style-type: none"> • Develop and approve Capital Improvement Plan for infrastructure requirements of Master Plan <ul style="list-style-type: none"> • Include scope, timing, and financing • Streets: roads, lanes internal to blocks, sidewalks, lighting and landscaping • Utilities: water, sewer, electric, gas (phone and cable?) • Surface Parking • Wayfinding signage | Village Council Public Works Planning Department | 2006 | 6 –12 mo |
| <ul style="list-style-type: none"> • Implement Capital Improvement Plan <ul style="list-style-type: none"> • Subject to and aligned with Private Development Strategy | Village Council Assigned Departments | Pursuant to CIP | Pursuant to CIP |
| <ul style="list-style-type: none"> • Pursue interim and long-term plans for Moore County abandonment and removal of well and water storage tanks <ul style="list-style-type: none"> • Interim – abandonment and removal of wellhead • Long Term – abandonment and removal of storage tanks | Village Council Village Manager Village Attorney Public Works Department | 2006 2006 | 6 – 9 mo 2 –3 yrs |
| <ul style="list-style-type: none"> • Relocate Village Public Works | Village Council Village Manager Public Works Department | 2006 | 2 – 3 yrs |

**New Core Master Plan
Implementation Schedule
(continued)**

| Category / Activity | Responsible Parties | Year | Term |
|---|--|----------------------|---------------------------------|
| PRIVATE DEVELOPMENT | | | |
| <ul style="list-style-type: none"> • Assess and approve implementation strategy for private redevelopment consistent with Master Plan focusing on one of two strategies: <ul style="list-style-type: none"> • I) Master Developer – Village leads redevelopment effort among aligned landowners and selects a single master developer • II) Village Land (only) – Village contracts with developer to develop the Village land; and • II) Private Land – Landowners independently submit development plans pursuant to amended PDO | Village Council Planning Commission Steering Committee | 2006 | 6 – 9 mo |
| <ul style="list-style-type: none"> • If Master Development implementation strategy is approved: <ul style="list-style-type: none"> • Solicit redevelopment landowners to agree to unified development approach • Select and work with qualified Master Developer aligned with Master Plan | Village Council Planning Commission Planning Department Staff | 2006 2007 | 6 – 8 mo Comple- tion |
| <ul style="list-style-type: none"> • If Village land (only) implementation strategy is approved: <ul style="list-style-type: none"> • Select and work with qualified Master Developer aligned with Master Plan | Village Council Planning Commission Planning Department Staff | 2007 | Com- ple- tion |
| <ul style="list-style-type: none"> • Pursue adaptive reuse opportunities <ul style="list-style-type: none"> • Obtain private developer for redevelopment of the Firehouse • Assist owner of Steam Plant in reuse assessment for the Steam Plant • Encourage reuse of existing structures in southeast quadrant | Village Council Village Manager Planning Commission Planning Department Staff | 2006 2006 2006 | 6 – 9 mo 4 – 6 mo Ongoing |
| <ul style="list-style-type: none"> • Encourage relocation of historic structures to southeast quadrant | Planning Commission Planning Department Staff | 2006 | Ongoing |
| MISCELLANEOUS | | | |
| <ul style="list-style-type: none"> • Develop, approve and implement unified Wayfinding / Signage Plan consistent with recommendations of Master Plan including: <ul style="list-style-type: none"> • web-based resources: Village website, internet mapping providers, GPS providers, etc. | Village Council Public Works Planning Department | 2006 | Ongoing |
| <ul style="list-style-type: none"> • Request and obtain landmark status for qualifying structures and erect plaques designating status and year built | Village Manager Planning Department Staff | 2006 | Ongoing |
| <ul style="list-style-type: none"> • Establish periodic review and assessment of Plan implementation | Village Council Village Manager | Quarterly | 3 – 5 yrs |

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Appendices

MEMORANDUM

August 2, 2005

TO: Warren Raybould
Raybould Associates

FROM: Randy Gross

SUBJECT: Village of Pinehurst: Market Reconnaissance
and Strategic Recommendations

This memorandum provides a summary of key factors impacting on the existing market for residential, retail, office, and other uses within the NewCore Master Planning area of Pinehurst village. Basic demographic and economic trends are summarized and information relating to each of the markets is conveyed. Further, several observations regarding opportunities and constraints for development are presented as an input to the Master Plan. Finally, strategic recommendations for marketing and development within the NewCore Master Plan study area are provided.

1. BASIC DEMOGRAPHIC & ECONOMIC TRENDS

Pinehurst is a unique place, in terms of its history and its identity, but also in terms of its demographics. A brief overview of demographic and economic trends in Pinehurst and Moore County is presented below as a basis for key observations regarding opportunities in the NewCore area.

Golf-Oriented Retirement Community

Pinehurst village has an affluent senior population base with relatively few families. In 2000, more than 42% of the population of Pinehurst was over the age of 65. This compares with 21% countywide and only 12% nationally. Pinehurst is a community that attracts retirees and seniors thanks to its mild climate, pleasant lifestyle, and exceptional golfing opportunities.

The senior population has grown, from 2,381 in 1990 to 4,101 by 2000, an increase of more than 72% over the ten-year period. However, seniors have declined as a percentage of the total population of Pinehurst, from 46.7% in 1990 to 42.3% in 2000. This reflects Pinehurst's growing attraction for families and others of a pre-retirement age.

Growing Family Population

The average household size in Pinehurst has been gradually increasing, from 2.01 in 1990 to 2.05 by 2000. This has occurred at the same time that household size has been declining nationwide, as families have fewer children and more people live alone. Overall, Pinehurst’s population increased by more than 90% between 1990 and 2000, to a total of almost 10,000. During this same period, the number of families with at least one child increased by 113%, or more than 400. Families increased their share of Pinehurst’s population from 14.6% in 1990 to 17.1% by 2000. There are indications that this trend has continued through 2005.

| Table 2. KEY DEMOGRAPHIC TRENDS, MOORE COUNTY, 1990-2000 | | | | |
|---|---|--------|------------------|---------|
| Factor | 1990 | 2000 | 1999-2000 Change | |
| | | | Number | Percent |
| <u>Population</u> | 59,013 | 74,769 | 15,756 | 26.70% |
| Over Age 65 | 12,254 | 16,271 | 4,017 | 32.80% |
| Percent | 20.80% | 21.80% | 1.00% | 4.80% |
| <u>Households</u> | 23,827 | 30,713 | 6,886 | 28.90% |
| Families (3+) | 8,514 | 10,160 | 1,646 | 19.30% |
| Percent | 35.70% | 33.10% | -2.70% | -7.40% |
| Note: | Families excludes couples with no children. | | | |
| Sources: | U.S. Bureau of the Census and Randall Gross / Development Economics. | | | |

High Incomes

Pinehurst is a relatively affluent community. Median household incomes were \$58,950 in 2000, compared with a national average of \$41,994 and a statewide average for North Carolina of only \$39,184. Per capita incomes in Pinehurst were \$41,992, compared with \$21,587 nationally and \$20,307 in North Carolina. Thus, Pinehurst incomes were 106% higher than state averages.

These high incomes reflect the leisure lifestyle of the predominately retirement-age population and the fact that much of the working-age population in Moore County lives outside of Pinehurst. A dearth of housing opportunities for families and workers impacts on median income levels in the village.

Moore County Changes

Moore County has a much more diverse population, in terms of income, family type, age, and ethnicity, than Pinehurst. However, the county is becoming more like Pinehurst in some ways.

Like the village, Moore County’s population increased significantly between 1990 and 2000, adding 16,000 people or 26.7%, for a total population of almost 75,000. Of this number, 16,300 or 22% are over the age of 65. The senior population expanded at a faster pace (33%) than the overall population of Moore County. At the same time, families account for a declining share of the household base in Moore County. Even with a 19% increase in the number of families with children, families’ share of Moore County households declined from 36% to 33% between 1990 and 2000. Thus, Moore County’s population is aging and becoming more like Pinehurst’s.

| Table 2. KEY DEMOGRAPHIC TRENDS, | | | | |
|---|---|-------------|-------------------------|----------------|
| MOORE COUNTY, 1990-2000 | | | | |
| Factor | 1990 | 2000 | 1999-2000 Change | |
| | | | Number | Percent |
| Population | 59,013 | 74,769 | 15,756 | 26.70% |
| Over Age 65 | 12,254 | 16,271 | 4,017 | 32.80% |
| Percent | 20.80% | 21.80% | 1.00% | 4.80% |
| Households | 23,827 | 30,713 | 6,886 | 28.90% |
| Families (3+) | 8,514 | 10,160 | 1,646 | 19.30% |
| Percent | 35.70% | 33.10% | -2.70% | -7.40% |
| Note: | Families excludes couples with no children. | | | |
| Sources: | U.S. Bureau of the Census and Randall Gross / Development Economics. | | | |

Incomes in Moore County are still significantly lower than in the village, with median household incomes of \$41,240 and per capita incomes of \$23,377. Overall, however, these are very similar to incomes nationwide. So, it is not as though Moore County is the “poor working cousin” of Pinehurst.

Employment Trends

Pinehurst was the home of the U.S. Open golf tournament this year and is increasingly popular as a must-play for any serious golfer. While Pinehurst and Moore County are world-renowned for their golf resorts, the area’s economy is more diverse. Moore County’s economic base is oriented to health care, retail trade, accommodation services (including the golf industry), and manufacturing. Overall employment trends in the county are summarized by sector in Appendix Table 1.

While Pinehurst and Moore County have a growing population base, the area’s economy suffered during the recession of 2001-02. Overall employment in Moore County fell from 28,696 in 1998 to 26,324 by 2002, for a decrease of 8.3%. This economic downturn was relatively concentrated in certain sectors,

with a serious decline in employment in manufacturing (-47.8%), wholesale trade (-11.9%), accommodation services (-10.5%), and surprisingly, the health care industry (-12.2%).

Most of these trends can be explained as part of national economic adjustments, namely a dramatic decline in manufacturing and wholesale at the national level (although not as rapidly as in Moore County), and the impact of 9-11 on hotels and accommodation services during that period. However, the decrease in health care employment is unusual, given the growth of that industry nationwide and especially in areas with large and growing senior populations.

At the same time, several local industries have expanded since 1998. Key growth sectors include professional services (71% or 515 new jobs), construction (19% or 298 jobs), administrative support (33% or 220 jobs), information services (65% or 137 jobs), and other services (34% or 337 jobs). The management services sectors expanded by 253% during this period, adding 177 jobs. Most relevant to Pinehurst Village is the increase in professional and information services, as well as finance (20%, 115 jobs) and real estate (28%, 68 jobs) employment.

Summary

Pinehurst and Moore County are well-known as a home to the U.S. Open and major golf resorts that have attracted a large retirement population. However, the area is more diverse than that and its economy has been influenced by the decline in manufacturing as much as by tourism and accommodation services. Both Pinehurst and Moore County are growing in population, thanks to the area's tremendous appeal as a place to live. Not only golf, but also the quaint villages of Pinehurst and Southern Pines, the year-round climate, and relatively low cost-of-living help attract a growing number of families and non-golfers to Pinehurst.

2. MARKET OVERVIEW

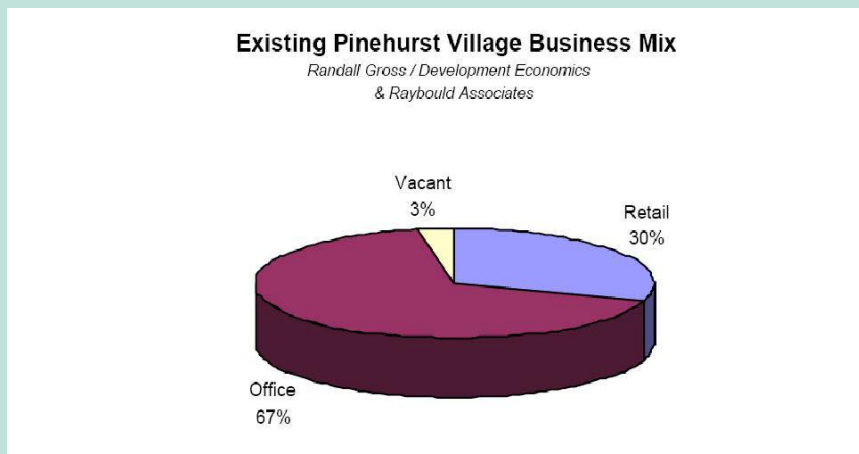
Key indicators for the existing real estate market were examined in order to assess possible opportunities and constraints to redevelopment within the NewCore area. In particular, attention has focused on residential, retail, and office uses. Discussions with residents, businesses, and other stakeholders have contributed information and have helped focus the list of possible uses and building types. This discussion does not constitute a full Market Analysis or indicate the economic *potential* for development or redevelopment within the NewCore area. However, it does provide background information useful to assessing key opportunities within the area.

Retail & Office

The commercial retail and office markets were examined with respect to their existing mix and character, key trends, and possible growth opportunities. The relationship between office and retail is particularly important as it relates to the existing situation in the Village Core of Pinehurst.

Site Analysis & Existing Business Mix

The existing Village core is an exceptionally unique, master planned commercial district designed in the 1920's to resemble a New England village. The district has retained its core design, including original buildings and architectural features. There have been relatively few buildings destroyed or added since the original construction, yielding the district its designation as a National Historic Landmark. As a result, the original character remains intact. On the other hand, some of the buildings remain un-renovated (walk-ups, inaccessible to handicapped) and the quality and competitiveness of space for modern retail uses is gradually in decline.



Originally, the Pinehurst commercial district was designed with retail and other businesses oriented to serving a self-contained resort community. In keeping with the theme of the original design, buildings were named after prominent New England universities (the Harvard Building, the Wellesley Building). There was a large building housing the Pinehurst Theatre as well as The Casino Building. A circular road pattern makes easy access from major highways like U.S. 15/501 difficult, and the district lacks visibility since it is nestled within the surrounding residential community. This location has helped the Village preserve and protect its special character, but also limits commercial opportunities for reaching the broader regional market.

Today, the Village commercial district functions largely for two purposes: first, as a professional services hub catering to local residents as well as investors; and second, as a “quaint” visitor-oriented specialty shopping center. The district has a total inventory of approximately 118,000 square feet of commercial space (excluding retail/restaurant space within the Pinehurst resort). Office space outweighs retail space, with 67% of the Village’s building space used for offices and only 30% used by retail or restaurants. Appendix Table A-2 details the use of space by type of business in the Village.

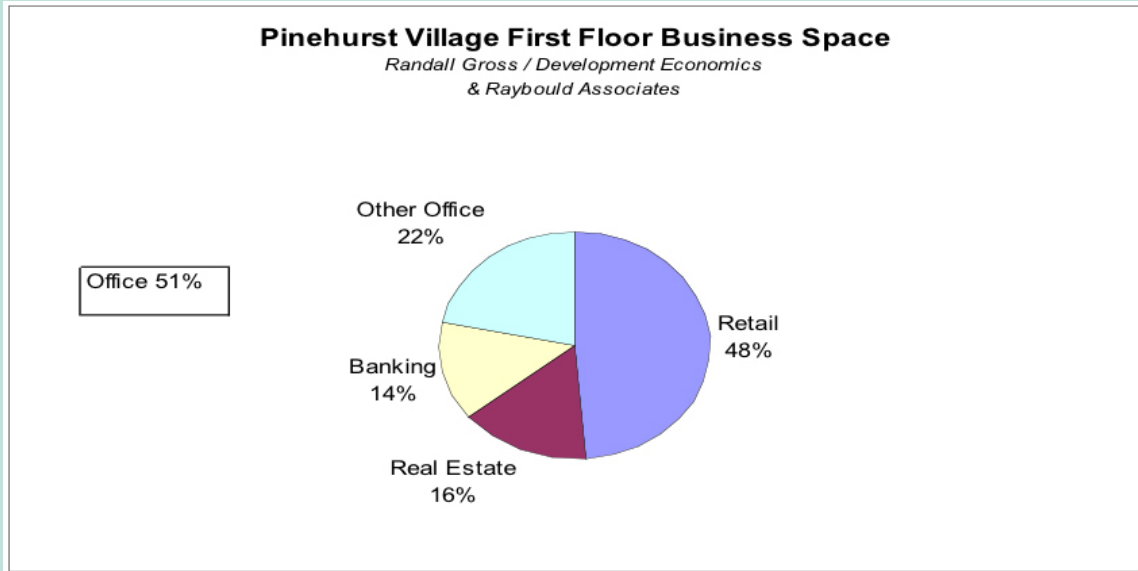
About 3,800 square feet of the Village space is vacant, yielding a healthy overall occupancy rate of 97%. However, the lack of space also constrains the ability of businesses to expand and reduces opportunities to diversify and/or enhance the business mix. Partly as a result of the lack of space, businesses have increasingly opened in Southern Pines to cater to a similar “village”-oriented service and visitor market.

Retail. Village retail is heavily oriented to shoppers goods stores, which represent 20% of the total business mix, but 65% of retail. As shown in Appendix Table A-2, the shoppers goods businesses primarily fall into four categories: apparel, accessories, gifts, and furniture/home furnishings. There is very little convenience goods use in the district, within only one small convenience store. There is no grocery or food store, pharmacy, gas station, florist, or other convenience use. This deficiency suggests that residents within walking distance or a short drive of the Village go elsewhere for their basic necessities.

There are also six eating & drinking places in the Village (excluding restaurants that are part of the Pinehurst hotels). These restaurants are generally small lunch or ice cream venues, with few full-service dinner restaurants. There are no entertainment venues in the Village, although one building once housed the Pinehurst Theatre, and there are a few personal service establishments (hair & skin salons).

| Table 3. EXISTING BUSINESS MIX BY TYPE, VILLAGE CORE, PINEHURST, NORTH CAROLINA, 2005 | | | | | |
|--|--|--------------------|-----------------------|--------------------|-----------------------|
| Type of Business | Number | Square Feet | Share of Total | First Floor | Share of Total |
| <u>Retail</u> | | | | | |
| Convenience Goods | 1 | 1,200 | 1.00% | 1,200 | 1.70% |
| Shoppers Goods | 23 | 23,800 | 20.20% | 23,800 | 33.40% |
| Eating & Drinking | 6 | 8,650 | 7.30% | 8,650 | 12.10% |
| Entertainment | - | - | 0.00% | - | 0.00% |
| Personal Services | 3 | 3,200 | 2.70% | 1,200 | 1.70% |
| Sub-Total | 33 | 36,850 | 31.20% | 34,850 | 48.90% |
| <u>Office</u> | | | | | |
| Real Estate | 8 | 19,700 | 16.70% | 11,100 | 15.60% |
| Legal | 3 | 11,200 | 9.50% | 2,300 | 3.20% |
| Professional | 5 | 18,000 | 15.20% | - | 0.00% |
| Financial | 3 | 10,100 | 8.60% | 10,100 | 14.20% |
| Other | 7 | 22,200 | 18.80% | 12,900 | 18.10% |
| Sub-Total | 26 | 81,200 | 68.80% | 36,400 | 51.10% |
| TOTAL | 59 | 118,050 | 100.00% | 71,250 | 100.00% |
| Vacant | 1 | 3,750 | 3.10% | - | - |
| Sources: | Randall Gross / Development Economics and Raybould Associates. | | | | |

Office. A significant share of office space in the Village is occupied by banks and real estate companies, both of which are oriented to servicing the needs of local residents holding investment properties throughout the area. Real estate offices account for 17% of the total space in the Village core and almost one-quarter of the office space. Banks occupy about 9% of the total space and 12% of office space. Professionals, such as architects and designers, as well as lawyers also occupy a substantial share of Village office space, with 15% and 10% respectively.



There has been some discussion of the number of real estate offices occupying ground-floor commercial space and its effect on the viability of the Village as a retail center. In fact, office space altogether occupies more than one-half of the ground-floor commercial space in the Village core. Regardless of whether it is real estate, banking, professional services, or other offices, this share of office space does tend to reduce consumer retail trade and there is a visual impact on Village activity. There should be a clear goal of reducing the share of office use in ground floor space by at least one-third, whether by changing uses or preferably, by increasing the inventory of available retail space.

Retail Business Sources

Data on business trends and issues have been collected through a survey of Village businesses, as well as from individual interviews with business owners and operators. Additional information provided by Pinehurst resort has been analyzed to assess shopping behavior and key issues among visitors. Finally, additional information on Village retail has been provided by commercial brokers.

Visitors. Golf and resort visitors are a primary existing market for Village shops. These visitors arrive from major metropolitan areas throughout the U.S. (New York, Washington, Philadelphia, Atlanta, Chicago, Los Angeles, Boston, Dallas, Cleveland, Baltimore, and Houston). But there is also a large share originating from within a few hours’ drive of Pinehurst (Raleigh, Charlotte, Greensboro, Norfolk/Richmond, and Greenville, among others). The largest shares of visitors by state are from North Carolina, followed by Virginia and New York. While many are drawn primarily by the golf (and associated resort amenities including the spa), there are a number that visit friends or relatives in the area.

Based on data from resorts and several hotels in the area, it is likely that there are upwards of 30,000 to 35,000 overnight visitors each year within Pinehurst (out of a total 1.2 million to the region), with an average stay of 2.0 to 2.4 nights per trip. According to State tourism data, 42% of Pinehurst visitors shopped in the area during their trip. A large majority of visitors (72%) are males, with the average age of 43. Among visitors' observations of Pinehurst Village are the following:

- “Quaint” and “charming” are key facets of the appeal
- Clean, safe, well-maintained
- Not enough entertainment (needed when golf is rained out)
- Village shop hours too limited (need evening & weekend hours)

Residents. Local residents of Pinehurst and Moore County account for a relatively small share of the existing retail consumer traffic, at perhaps 35% or less of the total existing market (and much less during the U.S. Open). There are several reasons for this, not the least of which is the lack of convenience and other local-serving retail businesses within the district. But also, the location of the Village core within a residential community and its basic lack of automobile access and visibility limit the district's capture of the larger regional market.

Based on a simple demographic assessment, the residents of Pinehurst alone generate annual retail expenditure potentials of about \$53.2 million per year, while the Village Core only captures estimated \$9 to \$11 million in retail sales. Assuming residents account for 35% of sales, then the Village only captures 6% of its existing primary market base. Further, the Village receives only a tiny share of the much larger Moore County market, which generated retail sales of \$1.1 Billion in 2004.

Rents & Ownership

There are relatively few buildings with space that comes available for lease at any given time in the Village core. Perhaps because of the limited supply and perceptions among property owners that the area is extremely desirable, rents in the Village core tend to be much higher than in other portions of the market, with tenants paying a premium for commercial space.

Based on a sample of tenants, rents in the Village Core range from about \$24.50 to as high as \$37.50 per square foot. These prices compare with market rents of \$15.00 to \$18.00 per foot in nearby shopping centers such as in Olmsted Village. At the least, these rents represent a 36% premium above market, paid for a Village core location without regard to the quality of the space or its visibility in the greater market. No doubt the high rents, coupled with the lack of ground-floor retail space, have kept the district from becoming more retail-oriented.

Competitive Commercial Nodes

There has been significant new retail construction in Moore County during the past several years. However, the primary existing competition to Pinehurst Village core is in other specialty retail nodes like Southern Pines or nearby neighborhood centers like Olmsted Village. Biltmore Professional Center is competitive for office tenants.

Partly as a result of the lack of opportunities for retail in Pinehurst, Southern Pines, Cameron, and Aberdeen have all emerged as charming and popular business nodes. Southern Pines offers small retail spaces and offices on either side of a rail line through the heart of the community. Based on a visual inventory, Southern Pines has roughly 370,000 square feet of commercial space.

The Southern Pines area shares some similarities in its retail mix to Pinehurst, with home furnishings stores, jewelers, real estate offices, women's apparel and accessory stores, banks, and gift shops. However, storefronts lining Indiana and Illinois Avenues also have book shops, children's shops, artist studios, bakery & food stores, bicycle shop, kitchenware store, wine shop & tasting, seafood & other restaurants, and one building that houses the Sandhills Theatre Company. The linear design of the Southern Pines commercial district allows for certain peripheral blocks to be oriented more to office space, while the core of the district is where retail predominates.

Olmsted Village is a retail center off Highway 211, just one mile from Pinehurst Village core. The village includes several buildings designed in a traditional manner, anchored by a Lowe's Foods and an Eckerd Drugstore. The center is designed with an orientation to neighborhood commercial, but aside from the supermarket and drugstore, the center has primarily attracted moderately-priced restaurants serving pizza, deli, southern, Thai, Chinese, and other cuisine. Seven of the 27 spaces in the center are vacant. The difficulty in filling space at the center may possibly result from a temporary over-supply of new retail space on the market as well as the center's dependence on the relatively small Pinehurst residential market.

Local entrepreneur Marty McKenzie is also developing the Camelia Parke Shoppes, another village-style specialty center in Pinehurst offering 360,000 square feet of commercial space. His Biltmore Professional Center is an existing 64,000 square-foot office condominium development located near Olmsted Village. Tenants include a mix of medical, accounting, insurance, and real estate-oriented professionals. About 1,250 square feet or 2.0% is available for lease.

In addition to the retail nodes, the Pinehurst resort also operates almost 14,000 square feet of retail space in its facilities. Resort retail uses include the

Main Shop and the U.S. Open Shop, as well as the various pro shops and hotel/inn retail uses.

Commercial Opportunities within the NewCore

The NewCore area offers opportunities for expansion of the existing Village center. Clearly, there is an opportunity for additional retail and office space to alleviate the real or perceived pressure on rents within the Village core and to diversify the business mix within Pinehurst. By doing so, more residents within the built-in market of Pinehurst and Moore County will be interested in making the Village a destination for shopping.

The scale and mix of potential commercial development within the NewCore can only be accurately determined through a more thorough market analysis. However, it can be assumed that the timing and tenant mix of such proposed developments as Camelia Parke Shoppes would impact on development opportunities within the NewCore area. It would be in Pinehurst's best interests to involve the existing local developers in the development process so that undue competition can be avoided and new opportunities enhanced.

Ideally, the retail inventory should be expanded by 50%, or about 18,000 square feet as an initial *target* to allow opportunities for expansion and new retail diversity. The development of a moderate amount of office space (6,000 to 12,000 square feet) might also help alleviate some pressure for first-floor office space in the existing Village core.

One way to enhance the opportunities for commercial use without creating undue competition would be to explore mixed-use, residential/commercial development formats. Residential development would help expand the market for retail and other commercial uses while ameliorating the impact on any existing or planned commercial development outside of the core area. Residential market issues are discussed in the following section. Furthermore, mixed-use development may enliven the area as a pedestrian-oriented district and create synergies that will attract more shoppers from within Pinehurst and Moore County. Any effort to diversify the mix away from a dependence on the visitor market will strengthen the Village as a community center.

Residential

The Moore County residential market is segmented by type of product to include primarily single-family detached houses (estimated at 60% of total stock). Many of Pinehurst's houses have been built as single, in-fill units on individual lots (with 2,000 lots still to be built). This has allowed the area to retain its unique small-town character and tree cover while avoiding large-scale suburban-style development.

Remaining Moore County housing includes condominiums (both multi-family apartment-style flats (22-24%) and single-family attached townhouses (6-8%)), as well as “patio homes” or “0 lot-line” houses (10%). Multi-family properties are not always popular, with buyers typically asking how they can avoid having “someone living above or below” them. Much of the multi-family property in the Pinehurst area was built in the 1970s.

Overall Housing Trends

Up until relatively recently, Pinehurst functioned primarily as a resort and retirement community. Pinehurst itself added over 2,300 housing units or 70.4% between 1990 and 2000.

Housing occupancy increased during this period from 74% to 80%. Still, more than 20% of the village’s housing stock was vacant in 2000, and vacancies in seasonal housing had almost doubled during the 10-year period.

| Table 4. HOUSING TRENDS, PINEHURST, | | | | |
|-------------------------------------|---|-------|------------------|---------|
| 1990-2000 | | | | |
| Factor | 1990 | 2000 | 1990-2000 Change | |
| | | | Number | Change |
| Number of Units | 3,326 | 5,668 | 2,342 | 70.40% |
| <u>Occupied</u> | 2,465 | 4,510 | 2,045 | 83.00% |
| Owner | 2,080 | 3,972 | 1,892 | 91.00% |
| Renter | 385 | 538 | 153 | 39.70% |
| <u>Vacant</u> | 861 | 1,158 | 297 | 34.50% |
| For Rent | 305 | 303 | -2 | -0.70% |
| For Sale | 100 | 151 | 51 | 51.00% |
| Seasonable | 305 | 605 | 300 | 98.40% |
| Other | 151 | 99 | -52 | -34.40% |
| Sources: | U.S. Bureau of the Census and Randall Gross / Development Economics. | | | |

Rental Market

About 50% of the county’s rental units are single-family homes, which cater more to long-term rentals. Condominiums are more popular for short-term rentals, many of which are managed by Pinehurst resort operator Club Corp. and rent in the \$100/night (1-bedroom) to \$200/night (3-bedroom) range. Long-term (over 3-month) condominium rentals range in price from \$700/\$800 per month for 2-bedrooms to \$1,000/\$1,100 per month for 3-bedrooms.

Between 1990 and 2000, Pinehurst’s rental vacancies declined from 44%, but were still extremely high in 2000, at 36%. The decrease in rental vacancy declined in part because relatively little rental stock was added between 1990

and 2000. Countywide, rental properties fare slightly better. The Moore County rental vacancy rate was 13.2% in 2000, down from about 14.4% in 1990. However, considering that Moore County’s rental property generally serves a more “local” market, these vacancy rates are still quite high.

For-Sale Housing Trends

Pinehurst has seen an average of about 590 housing sales per year since 2002. However, the number of sales has been increasing dramatically, with 119% more homes sold this year than in 2002.

| Table 5. HOUSING SALES TRENDS BY TYPE | | | | |
|---------------------------------------|--|------------|------------|--------------|
| PINEHURST, 2002 TO 2005 | | | | |
| | Single | | Condo- | |
| Year | Family | Townhouse | minium | Total |
| 2002 | 227 | 82 | 41 | 350 |
| 2003 | 376 | 77 | 78 | 531 |
| 2004 | 465 | 122 | 122 | 709 |
| 2005 | 468 | 142 | 156 | 766 |
| Total | 1,536 | 423 | 397 | 2,356 |
| Average/Year | 384 | 106 | 99 | 589 |
| 2002-2005 Change | 106% | 73% | 280% | 119% |
| Note: | 2005 data calculated based on year-to-date. | | | |
| Sources: | Village Properties and Randall Gross / Development Economics. | | | |

Single family houses constitute the majority of sales, accounting for about 65% of sales since 2002. Townhouses accounted for 18%, while 17% of sales were in condominiums. Condominium sales increased fastest during this period, with 280% more condos sold in 2005 than in 2002. Prices have also escalated, mirroring national trends during the recent housing boom. Median housing values in Moore County increased from \$131,000 in 2000 to \$200,000+ in 2004, for an increase of almost 14% per year. This compares with an annual escalation of only 6.3% per year from 1990 (when the median housing value was only \$80,300) to 2000.

The Moore County housing market is differentiated into several sub-markets. Within the rural parts of the county, housing values average \$140,000 to \$160,000, according to real estate brokers. Within the southern part of the county including the more urbanized areas of Aberdeen and Southern Pines, housing values average \$225,000. Countywide, condominium prices are generally \$60,000-\$70,000 (1-bedroom, 650 square-feet), \$100,000-\$165,000 (2-

bedroom, 750 square feet), and \$130,000-\$200,000 (3-bedroom, 850+ square feet).

Within Pinehurst, median housing values are over \$250,000, up from \$185,300 in 2000 (U.S. Census) for an increase of about 9% per year. Single-family homes in Pinehurst range in price from \$100,000 into the \$1.0 million range, with 36% listed at over \$500,000. Many of the higher-priced homes are located near Lake Pinehurst, Fairwoods on 7, and Country Club of North Carolina. Typical Pinehurst condominium prices range from about \$145,000-\$175,000 for 2-bedroom units and \$180,000-\$200,000 for 3-bedroom units, according to brokers.

Thus, Pinehurst housing prices are rising rapidly, but not as fast as in other parts of the county. Still, the 9% annual increase in median values since 2000 is much faster than the 1.4% increase in Pinehurst residential property values between 1990 and 2000.

Selected Target Markets

Within Pinehurst, the market for housing has traditionally been driven to a large extent by the retirement population. Many relocate from large metropolitan areas, attracted by the mild climate, charming community, low taxes and cost-of-living, and access to 42 golf courses including the world-class Pinehurst Resort. Many newcomers purchase or build single-family houses and age in-place or gradually move into retirement housing. A number wish to retain their independence and will move “down” into smaller, patio-style homes or condominiums.

A growing market within Pinehurst, as noted previously, includes younger couples and families with children that are also attracted by the quality of life and relatively low cost-of-living (compared with many northeast and west coast markets). The Planning Department reports that perhaps 50% of new building permits are issued to families with children, many of whom are relocating from within North Carolina. These families will purchase or build single-family detached houses, but will also consider other types of housing product including townhouses and multi-family condominium units. Finally, there are the staff of local clubs, businesses, and government, some of whom would move to Pinehurst if housing is available and affordable to them.

Club Membership

Many of the home and condo sales in Pinehurst are driven by demand for club memberships at the resort. In a sample of 80 recent condo sales, 33 or more than 40% were sold with club memberships. The median price for 2-bedroom condos without club memberships was \$108,000, while the median price for those with memberships was \$131,750, a 22% premium. The club

memberships are tied directly to lots, so club memberships can be transferred with the sale of a lot (for a price of \$12,000). If one purchases a lot without a club membership, then the price for gaining membership is set at \$40,000. However, the resort now allows homebuyers to purchase memberships attached to a non-buildable lot and transfer those memberships to another lot for \$12,000.

None of the potential development land in the NewCore area has club memberships attached. So, a critical question for the marketability as well as the financial viability of housing development within that area will relate to the ability of developers to gain memberships at transfer prices. If homebuyers are required to pay the \$40,000 price for memberships on top of the lot and house price, then the market is somewhat constrained. This issue will need to be resolved if housing is to be one of the uses in the NewCore area.

Sample Higher-Density Product

The NewCore area is perceived as a competitive location for residential development because of its access to the Village and due to the cache of living in Pinehurst. Local residents have been very successful in maintaining and even preserving the community's unique small-town, amenity-driven way of life. Many residents and business people agree that the small-town image of the Village's commercial district should be extended to the NewCore area. The image and feel of that district very much relates to its density, mix of uses, "walkability," and architectural heritage. The economics of development in the NewCore area would likely support higher-density housing consistent with the scale of the existing Village core, over low-density single-family detached housing as predominates on the periphery.

Middleton Place. There are several higher-density residential projects in the area that have been suggested as models for development within the NewCore area. One such example is Middleton Place, an "upscale" 50-unit patio-home project built by Alex Speight from 1985 through 1993. One apartment-style building at the complex was built with four-units. The remaining units are built as one-story, 2,200 square-foot "Charleston-style" duplexes, with three bedrooms and 2 ½ baths. The units offer two-car garages and such amenities as Corian countertops and high ceilings, and they average \$259,500 in price (for sales in 2005). Middleton Place has been very attractive for retirees and senior independent living, but there are also younger families living in the complex.

Lawn & Tennis. Lawn & Tennis includes 76 2,000 to 3,000 square-foot attached townhouses built in the 1970s off of Morganton Road. These units have a 1st-floor master bedroom in 1 ½ and 2-story townhouses with lofts. A new section of Lawn & Tennis known as Fairwood Villas is currently under construction. These units are designed as single-floor patio-style houses with 2,000 square feet of space.

Other. Other relevant developments include Lamplighter Village, with 30 units started in 2002 in a wooded area of Pinehurst. The complex includes townhouses, as well as duplex and triplex units. Some developments like Cotswold, started in the 1980's, have had very slow absorption. The 2,700 to 3,000 square-foot units were priced high at \$350,000 and have failed to capture a niche in the market. Other townhouse developments include Talimore, Longleaf, and Knollwood Village.

Residential Opportunities in the NewCore

Pinehurst is slowly transitioning from a somewhat rarified retirement community into a younger, more family-oriented residential enclave. Still, a large portion of the market is driven by access to the golf amenities for which the community is famous.

There is an interest in “extending” the scale and character of the Village into the NewCore area. Development of a higher-density housing, rather than the traditional single-family detached housing that characterizes the area, would be consistent both with the community’s vision and with the economics of development within that area. The market for rental uses appears to be somewhat limited, with an oversupply of rental units that keeps overall occupancies and rental rates low. Further, the retirement-age population has a preference against multi-family housing as a lifestyle choice.

The retirement-age buyer is also less interested in two-story units because of the steps. So, the opportunities for housing in this area are refined to include fee-simple “0” lot-line, patio home, and cluster home-style development and, to a lesser extent, townhouse condominiums (with ground-floor master suites). Some residents and brokers have envisioned development of “Georgetown”-style housing in the NewCore (although clearly not true to the real Georgetown, which consists primarily of townhouses. Rather, the large house/small lot development would include a mix of primarily 1-story styles (including duplexes) and would be consistent with the architectural integrity of the Village core. Existing demand for this product, whether from young families or retirees, seems to be confirmed through this market review.

For any such housing development to be supportable, there would need to be opportunities for some buyers to opt into the Pinehurst club memberships at a reasonable rate. Otherwise, housing development in this location will be constrained financially and would rely on the non-golf share of the market.

3. SUMMARY OF NEW-CORE OPPORTUNITIES

Demographic growth, and the cache of Pinehurst's name and amenities, helps propel demand for various uses at the NewCore area. Village retail and office space remains filled, despite operating deficiencies and high rents. Housing development is accelerating and prices escalating rapidly in the area as a growing retirement population and younger families opt for the amenity value of a Pinehurst lifestyle.

Retail may be temporarily over-built in the larger Moore County market, but there are opportunities for additional specialty and convenience retail development near the Village core. The addition of perhaps 18,000 square feet (15,000 to 25,000 square feet) of retail space in the NewCore may help attract a more diverse retail and entertainment mix to the area. Among the gaps in the existing retail mix are entertainment venues, convenience goods stores, and other businesses that cater to a more local market. There may also be other opportunities to reach the predominately male and sports-oriented visitor through expanded niche retail markets. However, retail businesses are not likely to be attracted to space in the NewCore unless it is **well-integrated with other uses and with the existing Village core**. Expanded parking opportunities would also benefit new retail (as well as existing retail) uses.

Some additional office space may also be warranted, given the occupancy of existing space in the Village and in surrounding commercial developments. The addition of 6,000 to 12,000 square feet of office space in the NewCore may allow some existing businesses to reduce their dependence on first-floor retail space in the Village. There may be demand for more office, but there is a need to ensure balance in the office versus retail uses.

There are also opportunities for residential uses in the NewCore, primarily in the form of "0"-lot line or cluster homes, patio homes, and some limited townhouse development. Such housing could be well-integrated with retail and office uses, as well as with the existing Village, to create a more enlivened community village core. However, privacy is also paramount for residential property owners, so integration of uses must be balanced with the privacy needs of potential residents. Given the absorption of higher-density housing in the market, it is possible to envision 30 to 40 units of this housing development within the next five-plus years (and more over the longer term), so long as it is designed for key target markets and includes an affordable option for Pinehurst club membership. Without the memberships, housing demand will be constrained in the NewCore.

4. MARKETING STRATEGY

Based on the review of market conditions and opportunities, it is highly recommended that the NewCore area function as an exciting, mixed-use extension of the existing core. Businesses and residents would be attracted to this area in order to benefit from the proximate location and positive image of the existing core, but also to take advantage of new, larger, and more diverse building formats than are presently found in the core.

Concept & Mix

The NewCore would include local-serving, specialty, and destination (e.g., sports-related) retail, restaurant, and entertainment uses. These uses would extend from the existing core and would be located in walking distance to new housing, such as patio / cluster homes and townhouses oriented to both retirees and younger pre-retirement residents. Office space would be developed within this mixed-use commercial/residential area to house professional services, medical offices, and real estate companies that would gradually expand or relocate from 1st-floor spaces in the existing core. The area would be complemented and integrated by a series of walkable streets and pathways, including direct linkages with the existing core area. Together, the existing village and new core areas would form a stronger and more economically viable village center for the growing community of Pinehurst.

Design & Land Use Implications

In order to maximize the marketing opportunities for the area and meet the expectations of existing and potential residents, the unique physical environment and architectural heritage of the existing village core should be extended seamlessly into the new core. Again, the unique heritage and lifestyle of Pinehurst create a strong “brand” that establishes its appeal as an attraction for residents and visitors alike. So, this brand should not be compromised through design, density, or development patterns that are wholly inconsistent with the original Olmsted plan for Pinehurst.

In order to avoid creating two separate commercial centers, New Core retail uses should be sited as closely as possible to the existing core, namely at or near the southern rim of the NewCore planning area. Residential uses should be focused on the northern half of the planning area, but with the possibility of overlap and integration with commercial use. Office space can be integrated with the retail uses but can also serve as a transitional use between the NewCore and the less desirable business areas north of the study area. By placing office or live-work space along McCaskill, there are opportunities created for further revitalization and redevelopment in blocks north of the study area.

5. DEVELOPMENT IMPLEMENTATION

Implementation of the master plan and associated concepts must be understood in terms of the overall development management structure, and associated phasing and financing strategies. There are basically two distinct options for managing redevelopment within the NewCore area, as discussed below. One option is for the Village to allow individual developers to gradually submit plans in a “piecemeal” approach for development of parcels in the NewCore area. A more “pro-active” option is for the Village to seek a Master Developer to ensure consistent implementation of the community’s master plan.

Individual Developers

One option for development of the NewCore is for the Village to take a reactive “wait-and-see” approach as individual developers gradually submit plans for parcels within the area. The likely phasing and financing of development in this scenario is discussed below.

Phasing

Under this incremental scenario, development would theoretically occur as the market warrants private investor interest. Phasing would relate to the market opportunities and financial return generated for specific uses or combinations of uses within the NewCore area. It may be the case that local interest or financial capacity does not materialize and little redevelopment occurs for decades. Based on experience, there is the likelihood that local investors and builders will show initial interest in small-scale development within the area, but they can become entangled in negotiations with existing property owners. Locations along existing roads would attract the most interest because new infrastructure would not be required. Larger-scale redevelopment may take longer because of the relatively high cost of assembling land and developing infrastructure to open up other sites in the interior of the NewCore area. Clearly, any effort to lure builders through the sale of public land would help speed up the process of redevelopment, at least for those public sites.

Financing

There are several key financing issues that would need to be resolved, regardless of how the NewCore area is developed. Most of these issues relate to the financing of public infrastructure, including new internal roads and parking facilities, plus accompanying urban design improvements (e.g., sidewalks, lighting, stormwater, etc) and public amenities (e.g., pathways, trails, public art, parkland). Ownership of these improvements must be determined so that maintenance and operating costs can be attributed. If maintained as private

facilities, then there will need to be agreement as to the use of easements or public right-of-ways for accessing the area and linking it with the existing village.

It is recommended that the two new main roads and most of the other facilities (aside from internal project roads) be owned and maintained by the Village, in order to ensure public access and accountability, and to lower maintenance costs through economies of scale. Nevertheless, development of this infrastructure can be financed by, or in partnership with, the private sector. Public participation in the financing of infrastructure would help leverage private development interest and will provide the community with more influence over the development patterns within the NewCore area. However, public or private financing of the infrastructure will be more challenging if the area is developed by individual developers in a “piecemeal” approach over time.

It may be difficult to achieve the economies of scale necessary to make the infrastructure financially feasible if developed incrementally. For example, a housing developer may somehow determine that it would be financially feasible to purchase the Village-owned sites and other properties on the northern end of the NewCore, and to build the necessary internal infrastructure to serve housing within those designated sites. But even in that case, it is unlikely that the housing developer would pay to extend roads and urban design infrastructure to connect south to the existing Village core.

In addition, public facilities at a minimum would still have to be financed largely by the public sector. There are federal funding mechanisms, including Community Development Block Grants (CDBG) that can be tapped for redevelopment of the fire station for civic use as a library.

Master Developer

Another option for consideration is a more pro-active approach to attract a master developer that would bring the necessary resources and capacity to develop the entire area according to the master plan. In this option, the Village would work with private property owners in the NewCore to determine objectives and needs, and then draft a collective request for proposals (RFP) for a master developer for the entire NewCore area. As an input to that process, the City would offer to include sale of its 6-acre site, so long as the private property owners also offered their land for sale as part of the development. The City would also manage the RFP process to attract a developer.

Phasing

Under a Master Developer option, the development of the area may be phased in as market conditions allow. However, a master developer is more likely to bring in the various specialty developers and builders that will move forward on their portions of the project. As a result, development phasing of the various components is more likely to overlap. Without a master developer, those individual specialty developers would enter the process whenever they decided to do so. In that case, phases (say for the townhouses, office buildings, or retail components) may occur independently with many years between them.

There would be more public scrutiny of a master developer's plan. A master developer attracted through a public RFP process is obliged to create a plan that conforms to the community's vision for the NewCore and to ensure that elements of the plan are implemented in a way that is consistent with that vision. A plan that accomplishes the community's objectives will be applied more effectively and sooner than those of individual developers in a piecemeal approach.

Financing

Under a Master Developer scenario, there are opportunities to pursue a Tax Increment Financing (TIF) district approach for funding the infrastructure and other public improvements (including the parking garage). While TIF enabling legislation is relatively recent to North Carolina, this tool has been used quite frequently in other states for many years. TIF assumes that public infrastructure improvements help leverage private redevelopment within a particular area, and it allows a jurisdiction to capture the resulting increase in property tax revenues from that new development to finance bonds to pay for the infrastructure. TIF only uses the "incremental" increase in tax revenues to pay off the bonds, and does not touch the existing level of property tax revenues within the district.

TIF is an appropriate tool for large master-developed or redeveloped areas because it can finance infrastructure improvements for the entire area at once and capture the incremental tax revenues linked directly to the new development. While it utilizes public revenues to finance the infrastructure, it does not diminish the existing revenue stream to the local budget. On the contrary, TIF enables new private development that may not otherwise occur without the infrastructure to support it. In the long term, the new development can generate a net fiscal benefit to the jurisdiction after the bonds have expired.

A TIF is most appropriate if private financing is unworkable. This is likely to be the case in the NewCore, where densities (and therefore residual land values) may not be sufficient to generate a return after debt service from major roads and infrastructure improvements is made. This is a

financial analysis that would still need to be conducted. There are also state and federal sources of funding for roads and infrastructure that could be used to match or compliment private sources.

If the Village depends purely on private infrastructure, build-out of the NewCore area is less likely to conform to the master plan as envisioned by the community. For example, private developers may need to increase densities, alter the land use mix (e.g., more commercial), and/or increase rents to a level that can support the cost of investing in the infrastructure. High rents will only conform to the existing situation where Village landlords are pricing out the types of tenants that the community wants to see in Pinehurst. Higher densities or more dependency on commercial uses can generate higher traffic volumes and have a deleterious impact on the community.

But, the likelihood that a private developer (or a TIF) will finance the NewCore infrastructure is increased significantly under a master-planned, master-developed scenario. Such is the case because of the economies of scale for developing roads and other infrastructure, especially within an urban context.

Summary

There are benefits to both approaches for implementation of the NewCore master plan. In a reactive, individual developer-driven approach, development of the area is more likely to occur gradually over time. The Village is less likely to expose itself to any financial risks. However, the individual developer approach does risk creating a more piecemeal development pattern that does not conform to the community's vision for the NewCore area. That approach also makes it harder to finance the large-scale infrastructure improvements that are proposed for the NewCore area, including the extension of roads and urban design improvements, as well as the parking facilities. If those improvements are financed privately, there is the possibility that developers will need to increase densities, alter the land use mix, and raise prices in order to recover those infrastructure costs.

The master developer approach is more efficient. It provides economies of scale that help ensure development is more consistent with the community's vision and that help recover the cost of infrastructure improvements through a TIF or private financing. Parking facilities can be wrapped into the financing of the overall infrastructure improvements. A master developer approach also reduces the cost of assembling land because individual property owners become part of a larger negotiation. The Village adds value to the redevelopment process by helping to bring the property owners to the table in a public-private partnership that they help create and from which they benefit.

A master developer-led process would probably ensure more rapid redevelopment within the NewCore area, which is something that the community may not inherently want. However, the community may also be more likely to achieve the objectives of their plan if implemented sooner. The trade-offs between timing, financing, and consistency with the community's vision must be addressed when contemplating an appropriate development policy for the NewCore area.

| Table A-1. AT-PLACE EMPLOYMENT TRENDS BY INDUSTRY | | | | |
|--|--|---------------|-------------------------|----------------|
| SECTOR, MOORE COUNTY, 1998-2002 | | | | |
| Industry Sector | 1998 | 2002 | 1998-2002 Change | |
| | | | Number | Percent |
| Agriculture | 30 | 59 | 29 | 96.70% |
| Mining | 50 | 42 | -8 | -16.00% |
| Utilities | 175 | 106 | N/A | N/A |
| Construction | 1,558 | 1,856 | 298 | 19.10% |
| Manufacturing | 5,749 | 2,999 | -2,750 | -47.80% |
| Wholesale Trade | 607 | 535 | -72 | -11.90% |
| Retail Trade | 4,174 | 4,046 | -128 | -3.10% |
| Transport/Whse | 235 | 354 | 119 | 50.60% |
| Information | 212 | 349 | 137 | 64.60% |
| Finance/Insurance | 567 | 682 | 115 | 20.30% |
| Real Estate | 244 | 312 | 68 | 27.90% |
| Professional Svcs | 731 | 1,246 | 515 | 70.50% |
| Management Svcs | 70 | 247 | 177 | 252.90% |
| Admin Support | 660 | 880 | 220 | 33.30% |
| Education | 198 | 225 | 27 | 13.60% |
| Health Care/Social | 7,035 | 6,180 | -855 | -12.20% |
| Arts/Entertainment | 976 | 750 | N/A | N/A |
| Accommodation | 4,185 | 3,746 | -439 | -10.50% |
| Other Services | 1,056 | 1,412 | 356 | 33.70% |
| Auxiliaries | 175 | 60 | N/A | N/A |
| TOTAL | 28,696 | 26,324 | -2,372 | -8.30% |
| Note: | N/A means Not Applicable because employment est based on Census ranges in one or more years. | | | |
| Sources: | U.S. Bureau of the Census and Randall Gross / Development Economics. | | | |

| Table A-2. | | BUSINESS MIX, PINEHURST VILLAGE CORE, 2005 | | | |
|---|-----------|--|----------------|---------------|----------------|
| Type of Business | Number | Sq. Ft | Share | 1st Floor | Share |
| <u>Convenience Goods</u> | | | | | |
| Grocery Store | - | - | - | - | - |
| Convenience Store | 1 | 1,200 | 1.00% | 1,200 | 1.70% |
| Pharmacy | - | - | - | - | - |
| Liquor Store | - | - | - | - | - |
| Florist | - | - | - | - | - |
| Gas Station | - | - | - | - | - |
| Misc Convenience Goods | - | - | - | - | - |
| Sub-Total | 1 | 1,200 | 1.00% | 1,200 | 1.70% |
| <u>Shoppers Goods</u> | | | | | |
| Apparel | 5 | 5,800 | 4.90% | 5,800 | 8.10% |
| Accessories | 5 | 3,600 | 3.00% | 3,600 | 5.10% |
| Shoes | - | - | - | - | - |
| Gifts / Specialty | 8 | 6,500 | 5.50% | 6,500 | 9.10% |
| Hardware / Bldg Materials | - | - | - | - | - |
| Furniture / Home Furnishings | 4 | 7,400 | 6.30% | 7,400 | 10.40% |
| General Merchandise | - | - | - | - | - |
| Department Store | - | - | - | - | - |
| Automobile Dealers | - | - | - | - | - |
| Auto Supply | - | - | - | - | - |
| Books/CD/DVD | - | - | - | - | - |
| Misc Shoppers Goods | 1 | 500 | 0.40% | 500 | 0.70% |
| Sub-Total | 23 | 23,800 | 20.20% | 23,800 | 33.40% |
| Eating & Drinking | 6 | 8,650 | 7.30% | 8,650 | 12.10% |
| Entertainment | - | - | - | - | - |
| Personal Services | 3 | 3,200 | 2.70% | 1,200 | 1.70% |
| <u>Office Uses</u> | | | | | |
| Real Estate | 8 | 19,700 | 16.70% | 11,100 | 15.60% |
| Professional | 5 | 18,000 | 15.20% | - | - |
| Legal | 3 | 11,200 | 9.50% | 2,300 | 3.20% |
| Medical | - | - | - | - | - |
| Financial | 3 | 10,100 | 8.60% | 10,100 | 14.20% |
| Post Office | 1 | 5,000 | 4.20% | 5,000 | 7.00% |
| Other | 6 | 17,200 | 14.60% | 7,900 | 11.10% |
| Sub-Total | 26 | 81,200 | 68.80% | 36,400 | 51.10% |
| TOTAL | 59 | 118,050 | 100.00% | 71,250 | 100.00% |
| Retail | 33 | 36,850 | 31.20% | 34,850 | 48.90% |
| Vacant | | 3,750 | 3.10% | - | - |
| Sources: Randall Gross / Development Economics & Paybould Associates. | | | | | |

Condensed Summary of Participants' Input
Kickoff Trip Interviews & Public Meeting
Pinehurst, NC NewCore Master Plan
May 4 & 5, 2005

During the first trip and follow-up visits, the Project Team met with a variety of stakeholders identified by the Village to collect input relevant to the NewCore Master Plan. In numerous individual and group sessions collectively totaling over 30 hours, members of the team heard from residents, property owners, civic volunteers, Village officials, business owners, and other interested persons.

A remarkably consistent message emerged from these sessions: *Pinehurst citizens and property owners would accept and look forward to changes in the NewCore, so long as those changes are consistent with the high standards for physical form and appearance maintained in the old Village, and so long as the changes do not include land uses that generate negative impacts on nearby properties and the Village as a whole.*

The following is a very condensed summary of the observations and comments received during the initial meetings.

Economic and demographic observations

- Visitors to Pinehurst often don't remain there for certain needs such as entertainment, dining, and shopping – even those visitors that stay at hotels within walking distance of the old Village center. Instead, they tend to go to Southern Pines for their needs.
- There is an increasing perception that the population is younger than formerly, and that younger people, some with families, are bringing new needs and expectations for both commercial and public uses in and around the Village.
- The traffic circle and highway congestion make trips to Aberdeen or Southern Pines increasingly burdensome. Pinehurst would be a natural stopping point, if it had more uses of interest.
- The Village center is perceived to be at risk:
 - Participants expressed a sense that the Village center is losing not only regular commercial uses, but also the boutiques and quaint retail shops to other destinations.
 - Participants also noted that day-trippers and overnight guests might be enticed to spend more time there if it had a “critical mass” of shopping, dining and entertainment and if businesses were open in the evening or on Sunday.
 - The Village center is perceived to be hard to find even when visitors are provided with directions.

Physical form and character of the NewCore

- Participants feel that any new development should continue the character, form, and style of existing development in the desirable older parts of the Village.
 - High amenity value is a key part of this character: beautiful landscaping, charming buildings in picturesque ensembles, walkable public spaces with inviting pathways, and so on.
- The scale and amount of new development should be restrained (no more than 2 to 3 stories, with occasional/ possible exceptions for landmark buildings).
- Preservation and re-use of historic structures on the site, in particular the fire station, is important to participants.
- More information about physical form and character will be provided with the analysis of the Vision Survey.

Public support for change and development

- There is a need to establish a sense of trust about new development.
 - Any developer who undertakes a project in the NewCore needs to have a known baseline of experience and sensitivity in prior projects.
 - Stakeholders need to feel confident that the ambiance of the old Village will be preserved.

- The community would generally be supportive of additional commercial space if it was “shaped like” preferred examples. Participants feel strongly that new development must complement and enhance, rather than compete with or take away from, the old Village center.
- Multi-family projects are said to have gone through the Village Council and Planning Board with relative ease in recent years. There is a recognized need for more of this use type.

Relationship of Newcore to surrounding areas and uses

- The plan for the NewCore should to take advantage of high-quality areas nearby: the Arboretum and Wicker Park; the old Village center; greenway connections.
- Some participants felt that the New Core represents an opportunity to locate use types that are not desirable in the old Village center.

Accommodating vehicles

- There were many ideas related to how the NewCore could be used to mitigate traffic and parking impacts in the existing Village center.
- Some concerns were expressed about vehicular traffic impacts of new development and opening a new street internal to the site.

Preferred local examples

- The local example that participants most frequently cited as a model for new development is the old Village center. This feeling appeared to be nearly universal.
- Some participants mentioned Southern Pines for its mix of uses and liveliness in the evenings.
- No other local examples were mentioned favorably.

Preferred non-local examples

- Coastal New England villages that have maintained their small-town charm while becoming boutique tourist destinations
- Blowing Rock, NC, a destination with a confluence of activities in one central location: people-watching, shopping, eating, enjoying the outdoors, kid-friendly public spaces
- The Ferry Terminal building in San Francisco, with its mixed bag of specialty uses such as a wine shop and a specialty meat market
- Hilton Head, SC and Beaufort, NC, were cited as having appropriate access via arterial roads to quaint boutique shopping streets
- Phillips Place (Charlotte, NC) – upscale retail; residential above; theater
- Mizner Park (Boca Raton, FL) – no offices on first floor; pedestrian/greenspace/fountains; quiet enclave; upscale retail, office, and residential uses; parking at periphery (in structures) and on street
- Davidson, NC – parking model: park in rear & walk through nice space to get to shops; zero lot line
- Lake Forest, IL – Olmsted-designed area; market square with retail below, offices/residential above; 2 floors average

Uses and activities suggested by participants for the NewCore

Commercial:

Quality restaurants

Sidewalk cafes

Branch bank

Small-scale convenience services:

- Men's haircuts

Specialty/boutique retail shops:

- Liquor store
- Wine store
- Fresh flowers
- Delicatessen
- Specialty food market:
- Art galleries

Professional offices – preferably not ground floor

Real estate agencies – preferably not ground floor

Tasteful interior design showroom

Entertainment, cultural, artistic uses:

Performance venue

Theatre (dinner theater, art-house cinema)

Art studios

Residential:

Garden apartments, if designed correctly

Upscale elder housing; assisted living facility

Very high-end flats

No-maintenance very high-end townhouses

Outdoor amenities & public/quasi-public space

Good-sized gazebo or concert stage

Pathways in & out

Community activities

Outdoor cafés

Water feature

Beautiful landscaping

Sidewalks

Pocket parks

Adequate parking

Challenges identified at kickoff meeting

Perceived distance to old core

Restrictions on development due to proximity to water tanks and possible well

Sloping topography, especially at northwest side (McCaskill) as it relates to pedestrians with mobility limitations

How to reuse old Fire Station

Accessibility of site for vehicles from surrounding street system

Potential traffic impacts of additional development

How to maintain Village walkability

Current location has no destinations

Discouraging 'tenant hopping'

Setting appropriate building heights

Providing adequate parking – including for residential uses

Reducing or eliminating undesirable parking impacts

Hiding a parking structure

Getting active uses in existing Core

Strengths/Opportunities identified at kickoff meeting

Proximity to old Village center
Village ownership of approx 1/3 of site or 6 acres
Workable size (approx 19 acres)
Re-use of vacating Fire House
Good partners, such as Club Corp.
Multiple linkages to surrounding areas such as new Arboretum
Opportunity to create a gateway to old core that is also a destination in itself
Topography advantageous for "hiding" undesirable uses
Opportunity for more or auxiliary parking
Public Works facility and Hughes are existing high-traffic uses already
Create new road internal to site
Walkable extension & expansion of old core
Augment / enhance / protect / complement old core
Owners are mostly local people
Chance to have different land uses than old core
Limit auto traffic; put pedestrians first
Use residential space to protect periphery near quality neighborhoods
High demand exists for maintenance-free residences
Could create critical mass of new core + old core to keep evening/weekend visitors in town

Village of Pinehurst

NewCore Master Plan

Vision Survey

Results

Survey Issue Categories

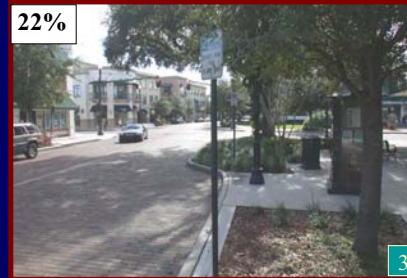
- Streetscapes
 - Sidewalk Width, Materials & Design
 - Building Setback in Relation to the Street
 - Building Scale, Design & Character
 - Landscaping & Lighting
 - Streetscape Furniture (benches, trash receptacles, etc.)
- Buildings
 - Height & Scale
 - Facade Design
 - Roof Forms & Canopies
 - Detailing & Materials
- Public Spaces
 - Design & Character (green vs. hardscape)
 - Paved Areas & Features (fountains, etc.)
 - Landscaping & Lighting
- Parking
 - Parking Lots (character & design)
 - Parking Structures (character & design)
- Signs
 - Location & Scale
 - Design & Character
 - Colors & Materials

Streetscapes

- Sidewalk Width, Materials & Design
- Building Setback in Relation to the Street
- Building Scale, Design & Character
- Landscaping & Lighting
- Streetscape Furniture (benches, trash receptacles, etc.)



Streetscapes: General Character



Streetscapes: General Character



2

Streetscapes: General Character



3

Streetscapes: Sidewalk Materials & Design



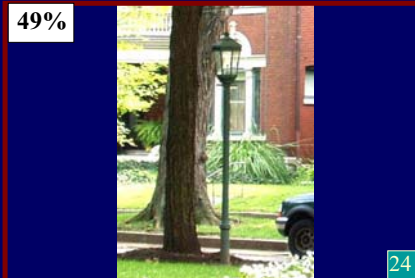
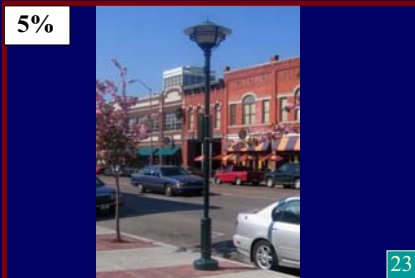
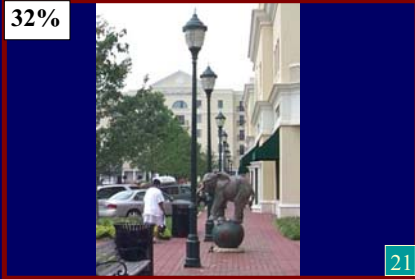
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Streetscapes: Sidewalk Materials & Design

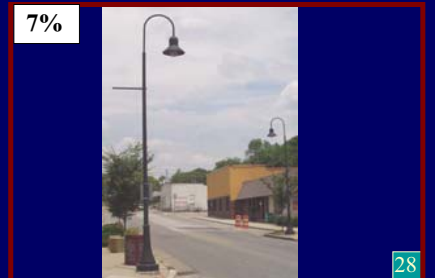


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Streetscapes: Street Lights



Streetscapes: Street Lights



Streetscapes: Benches



Streetscapes: Benches

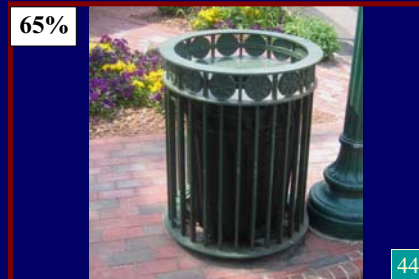


Streetscapes: Trash Receptacles



10

Streetscapes: Trash Receptacles



11

Buildings

- Height & Scale
- Facade Design
- Roof Forms & Canopies
- Detailing & Materials



Buildings: Commercial / Mixed-Use



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Buildings: Commercial / Mixed-Use



Buildings: Commercial / Mixed-Use



Buildings: Commercial / Mixed Use



Buildings: Townhouses



Buildings: Townhouses



Buildings: Townhouses



Buildings: Condominiums



Buildings: Institutional



Public Spaces

- Design & Character (green vs. hardscape)
- Paved Areas & Features (fountains, benches, etc.)
- Landscaping & Lighting



Public Spaces: Parks & Plazas



Public Spaces: Parks



Public Spaces: Plazas



Parking

- Parking Lots (character & design)
- Parking Structures (character & design)



Parking: Character of Parking Lots



Parking: Parking Lot Screening



Parking: Parking Structures



Signs

- Location & Scale
- Design & Character
- Colors & Materials



Signage



Signage

