

Economic Development Opportunity Assessment for Lower Currituck

**Draft Final Report
September 17 2016**

Brent Lane

Summary

At its best, economic development is a means of community directed economic self-determination. However, it is more often the case that economic development is practiced without the active involvement of affected populations in articulating community preferences. The omission of broad community involvement, especially in circumstances where consensus on priorities and strategies are difficult to define, can facilitate the mechanics of economic development. But the absence of such involvement can also result in an environment of public discontent that impedes policy improving citizens' well-being even in circumstances of attainable economic opportunities.

Avoiding such a conundrum requires a commitment to public engagement that elicits informed, actionable policy insights that are then explicitly incorporated in the design and implementation of communities' economic development strategies. This Economic Development Opportunity Assessment for Lower Currituck was undertaken specifically to engage with the citizens of the Lower Currituck study area to describe a consensus vision of desired future development and to inform the county's efforts to achieve such outcomes through an identification of market-validated strategies.

The researchers worked with county officials in a methodology that combined community-level research with market-validated data analysis to ensure research outcomes with relevance and utility in the implementation of Currituck County's economic development strategy. The assessment finds that:

1. While national forces had retarded the pace of economic change affecting Lower Currituck for much of the past decade:
 - Those restraints have gradually eased as economic activity has increased in the County and across its relevant economic region
 - The solidification of the Mid-Currituck Bridge project is affecting planning and expectations in uncertain ways
 - Geographic constraints on OBX industry cluster growth creates market forces that are directing activity and outcomes, desired or not, to Lower Currituck
 - The economic development planning and efforts of surrounding counties will affect Lower Currituck as well
2. Accordingly, the citizens and communities of Lower Currituck face three likely economic futures:
 - An economic future that is an extension of the activity occurring throughout the Outer Banks area that market forces would distribute to Lower Currituck ("Inactive")
 - An economic future that is being shaped by recent and ongoing economic activities in the region ("Reactive") and addressed through incremental policy responses
 - An economic future that is both realistically attainable and consistent with community consensus desired outcomes as facilitated by local public policy decisions ("Proactive")

3. Engagement with a broad cross section of Lower Currituck citizens found that, despite widely shared perceptions of divergent economic growth attitudes, a consensus was identified supporting economic growth in the region not merely as necessary but also desired if consistent with informed preferences, including development:
 - Enhancing upward employment opportunities for existing residents
 - Supportive of retaining and enhancing the region's distinctive individual communities as residential and commercial locales
 - Compatible with preservation of the region's aesthetic, environmental and cultural heritage assets

4. This community consensus can be combined with demonstrated market-validated outcomes to describe a Lower Currituck "Route Map" of economic development opportunities to achieve attainable, community prioritized outcomes. The Route Map developed for Lower Currituck found that its position in the Outer Banks regional economic geography creates specific advantages, including:
 - The attraction and growth of family-oriented small businesses invested in their communities sustainability
 - Waterfront eco-tourism resort and activities centers where development inherently capitalizes on while preserving natural and cultural assets
 - Value-added tourism cluster, entrepreneurial and workforce development in hospitality management, culinary education and "farm to fork" family agribusiness

On August 22 2016 the Lower Currituck Economic Development Route Map was presented to a community meeting to garner feedback for consideration by county officials in considering economic development strategies for the study area. Insights and observations from community members are incorporated along with prior task results in the following final report.

Introduction

While by most measures the citizens of Lower Currituck are economically better off than the average North Carolinian, development activity and economic growth in Lower Currituck has demonstrably lagged that of other areas of the county and of Currituck County as a whole. The perception of many Lower Currituck County residents that their community is underperforming may be primarily shaped by the visible contrast of commercial and residential development in Lower Currituck compared to growth elsewhere in the County and the broader Outer Banks region. That perception is supported by incisive quantitative measures of economic well-being and development activity that show Lower Currituck is lagging, and perhaps falling even further behind, its neighbors.

Numerous citizens of Lower Currituck recognized this phenomenon and were understandably concerned about the reasons for this disparity and its consequences for the area's residents. These concerns were communicated to their local elected officials and government officials who faced the considerable challenge of responding responsibly to a complex variety of perspectives and opinions, both voiced and unvoiced.

Such muddled situations are the norm rather than the exception. Their occurrence exacerbates the already difficult task of devising informed planning policy and economic development strategies that are responsive to a community's implicit and explicit priorities. Conflicting public perceptions, while they may often be unsubstantiated and contradictory, can still prove to be substantial barriers to consensus-based policy formulation. Currituck County engaged a consultant to assist its staff in better understanding the shared economic priorities of Lower Currituck's citizens as an aid to informing the County's work on behalf of the area.

An Economic Development Opportunity Assessment for Lower Currituck

In fall 2015 Edward Brent Lane was contracted with by Currituck County to conduct an Economic Development Opportunity Assessment for Lower Currituck. The area to be studied included the area of Currituck County south of the Intracoastal Waterway canal, encompassing the communities of Waterlily, Aydlett, Poplar Branch, Grandy, Jarvisburg, Powells Point, Harbinger and Point Harbor. The contract called for total payment of \$18,500, which included all associated expenses, for a project term of December 2015 to May 2016.

The assessment was undertaken specifically to engage with the citizens of the Lower Currituck study area in order to describe a consensus vision of desired future development and to inform the county's efforts to achieve such outcomes through an identification of market-validated strategies. The researchers worked with county officials in a methodology that combined community-level research with market-validated data analysis to ensure research outcomes with relevance and utility in the implementation of Currituck County's economic development strategy. The primary elements of the executed methodology included:

- The performance of an **Economic Scan** of the study area to gather essential current and historic economic, business and demographic information along with conclusions and analysis on changes in key demographic, economic and business statistics;
- The conduct of a **Community Visioning Engagement** with Lower Currituck County citizens in community meetings and through direct “key informant” interviews with business owners, employees and citizens to ascertain residents’ priorities for future development in the study area;
- The synthesis of articulated community preferences into a consensus **Success Matrix** of highly desired economic development objectives that juxtaposed market-validated economic growth and development outcomes from comparable communities within the context of the Lower Currituck community prioritized beneficial outcomes;
- The delineation of a Lower Currituck **Economic Futures Route Map** that conceptualized economic growth and development options to achieve the community’s prioritized economic outcomes. The anticipated economic impacts of successful policy were described through a constructed “virtual portfolio” of economic growth and development outcomes; and
- The presentation of the Economic Futures Route Map concept to the affected community to garner feedback for consideration by county officials in considering economic development strategies for the study area.

Lower Currituck Economic Scan

An **Economic Scan** of the Lower Currituck study area was performed to gather essential current and historic economic, business and demographic information along with conclusions and analysis on trends in key demographic, economic and business statistics. This work presented the opportunity to revisit and update the similar, though more encompassing Currituck Demographic and Economic Scan conducted during the development of 2008 Currituck Economic Development Strategy Vision Plan.¹

The 2008 analysis - which was completed immediately prior to the onset of the “Great Recession” - had identified several conspicuous findings worthy of special attention.

By many conventional measures Currituck’s economy was prospering:

- The county’s median household income was well above the North Carolina figure and was attracting many new residents drawn to its high quality of life and economic vitality;
- Its unemployment and poverty rates were typically among the lowest in the state;
- Its residents enjoy a property tax rate well below that of their neighbors in adjoining counties

The study found that the positive economy was largely attributable to the success of Currituck’s tourism industry which was regularly setting records for visitation, expenditures and tax receipts.

But beneath these positives the study identified a concern that economic benefits were not widespread or especially penetrating:

- The Currituck economy was not producing many jobs, and few of those jobs pay well;
- Although household income ranked high in the State, average weekly wages were among the State’s lowest with many jobs being highly seasonal;
- Most Currituck residents choose to – or had to – “out-commute” to jobs elsewhere; and
- Large numbers of low-income Currituck residents were leaving the county.

Among its conclusions, the 2008 Currituck Economic Development Strategy Vision Plan found that Currituck County had the opportunity to improve the economic well-being of a broader cross-section of its citizens through economic growth and development policies capturing more of the higher value-added sectors of the Outer Banks region tourism industry cluster.

Updating the 2008 Currituck County information required gathering equivalent data at the sub-county level. This task is complicated in that most economic data, such as that produced by the state and federal governments, is collected at the county level. Such data is useful as context

¹¹ Brent Lane and Jason Jolley (November 2008) UNC Center for Competitive Economies. “Economic Development Strategy “Vision Plan” Currituck County, North Carolina Final Report”. Accessed at: <http://co.currituck.nc.us/pdf/ed-news/Currituck%20Final%20Report%20November%202008.pdf>

but provides less insight to the particular circumstances facing a sub-county area Lower Currituck.

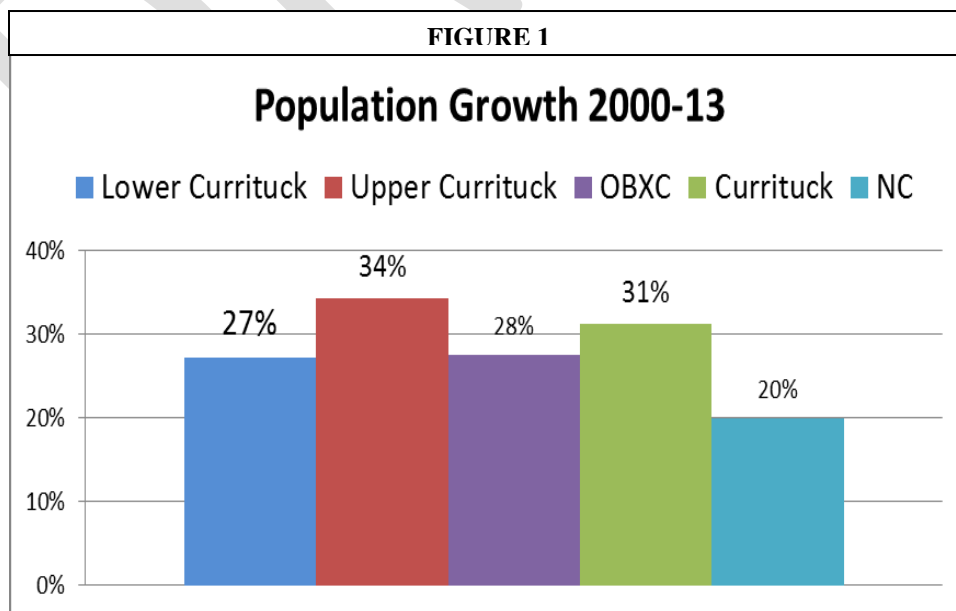
Fortunately, similar though not identical economic data is collected by the U.S. Census in a more granular level through surveys of households and businesses at a smaller scale, i.e., the level of census tracts. Census tracts generally have a population size between 1,200 and 8,000 people. Currituck County is divided into five census tracts, with the Lower Currituck study area being encompassed by Census Tract 37053110400. This allows census data specific to Lower Currituck to be compared with information from Upper Currituck and Outer Banks Currituck (OBXC) and with the county as a whole.

Lower Currituck v. Currituck

The picture of Lower Currituck that emerged from this analysis was of a region with growth that - while outperforming North Carolina - lags the rest of Currituck County in terms of economic benefits delivered to its citizens. Nonetheless it is important to recognize that despite recent slowdowns from long-lingering recessionary effects of the 2008 U.S. and international economic downturn, Lower Currituck and the county have experienced long-term growth that is continuing, albeit at a slower pace than might be desired.

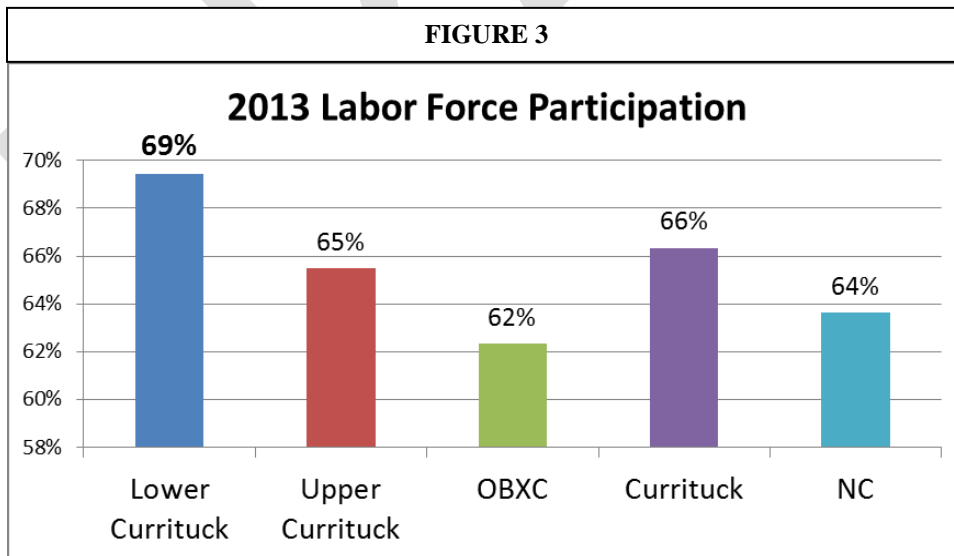
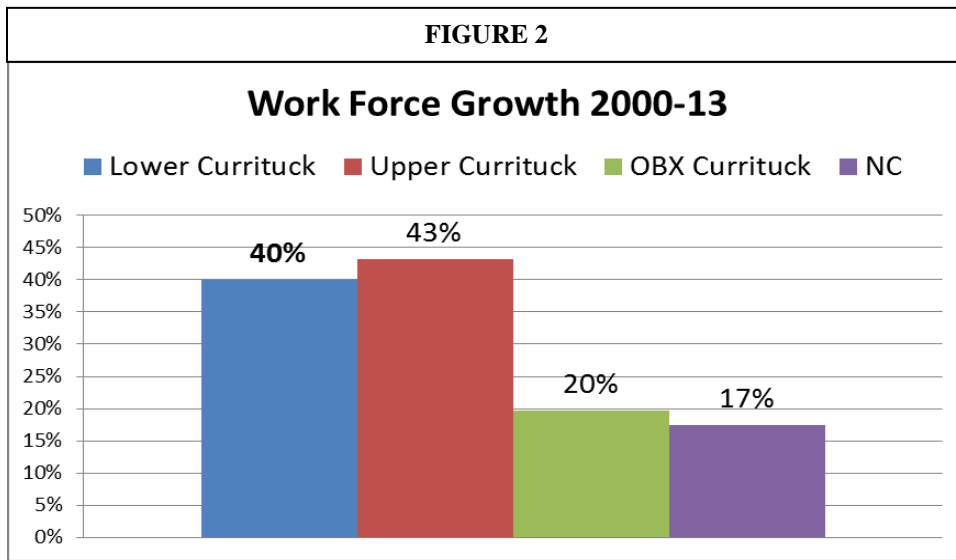
Population

Between 2000 and 2013, the population of Lower Currituck grew from 5,843 to 7,438, adding 1,595 new residents, a growth rate of 27% over the period. This rate was substantially higher than the state of North Carolina's (one of the nation's fastest growing states in recent decades) population growth rate of 20%. Despite this relatively robust population growth, Lower Currituck still added a significant smaller share (figure 1) of new residents than the rest of Currituck County.



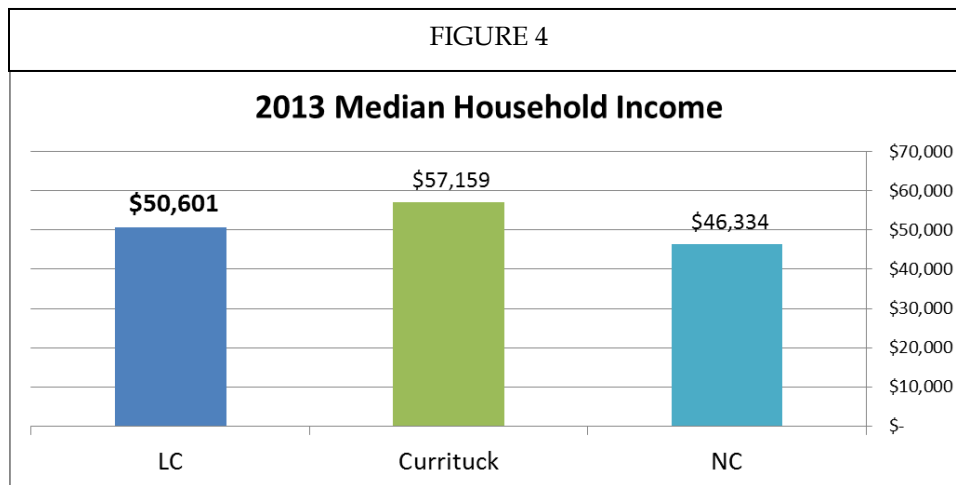
Workforce

Despite strong workforce growth of 40%, Lower Currituck especially trailed its mainland Currituck neighbors to the north in absolute number of new residents of working age (figure 2). Between 2000 and 2013 Upper Currituck added 2,549 working age residents to the 1,112 added in Lower Currituck. But Lower Currituck does exceed the rest of the county in its level of workforce participation (69% vs. 66%), indicating that employment prospects for its residents are strong (figure 3)



Income

But what is not strong is the economic benefit this economic growth is delivering to Lower Currituck citizens. In 2013, while the median household income of Lower Currituck of \$50,601 exceeded the state average, it lagged well behind that of Currituck County overall (figure 4). Since perceptions are usually based on ready comparisons, it is the performance against other better-performing areas of Currituck that most shape the opinions and satisfaction of Lower Currituck residents.

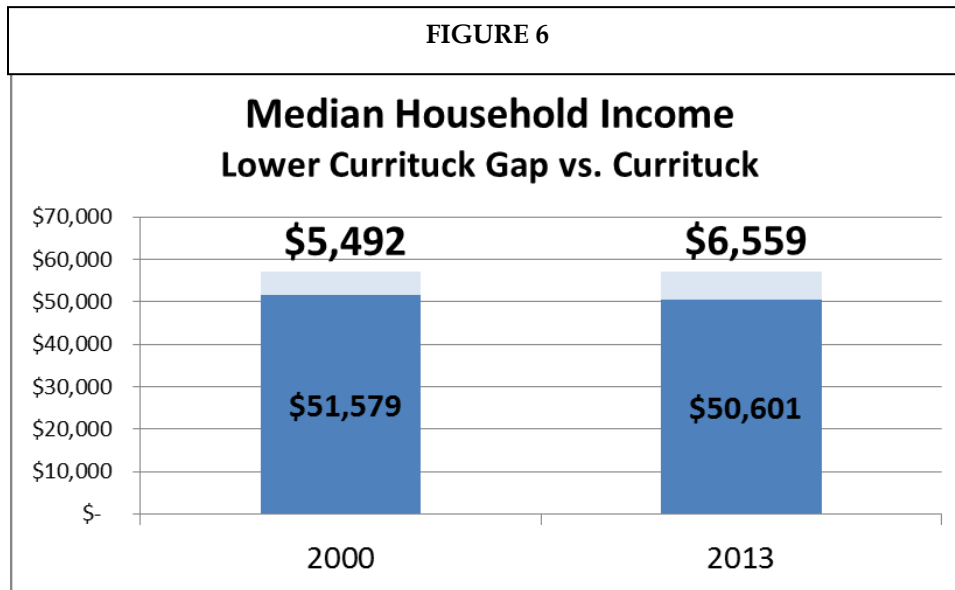


Ominously, the income gap between households in Lower Currituck and the county overall is widening, increasing by more than 20% from the 2000 level of \$5,492 had grown to \$6,599 in 2013, despite the region's higher level of workforce participation (figure 5).

Regional Industry Analysis

A potential explanation for Lower Currituck's income disparity – and reminiscent of the findings of the 2008 report - is the region's relative lack of participation in the Outer Banks primary industry of tourism. Lower Currituck is home to fewer than its share – based on relative population – of businesses that are part of the industry cluster of firms that constitute the Outer Banks tourism economy.

Industry clusters are groups of similar and related firms in a defined geographic area that share common markets, technologies and worker skill needs; they are often linked by buyer-seller relationships. Economists have identified approximately 50 different industry clusters ranging from aerospace to weaponry. Historically, North Carolina has been home to prominent clusters composed of thousands of firms in the textile, tobacco and furniture industries.

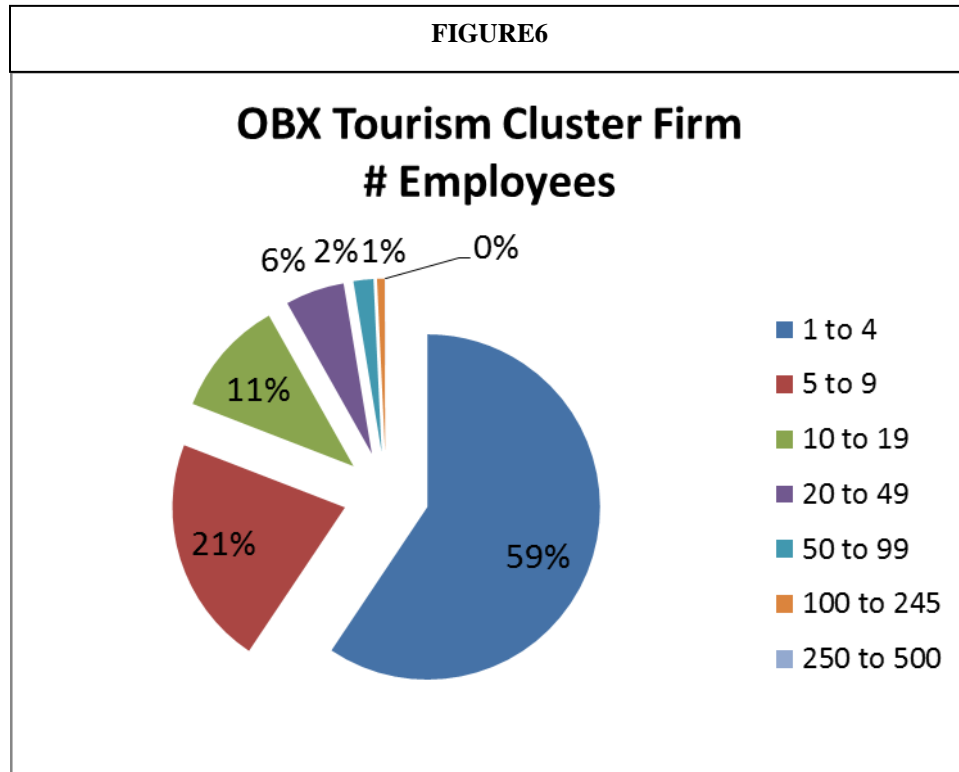


Industry cluster analysis builds on conventional economic impact methods by using public and proprietary data sources to conduct business-level economic assessments. Identifying and describing the businesses that collectively compose an economy allows for a more specific, more “particular” understanding of the scope as well as depth of that industry’s presence. For example, there are vastly different economic diversification implications between a regional industry that employs 2,000 people at only two companies versus the same total number at 20 firms. Cluster analysis makes those distinctions.

Examining the cluster at the company level can also discern potential areas of either over-population where too many businesses may be trying to serve the same customers, or cluster categories where a paucity of resident businesses may suggest areas of potential new growth. Similar gaps may be identified by examining the geographic distribution of companies in a regional cluster and noting areas within the region that lack a proportionate share of industry presence. Where such “cluster gaps” are identified may provide a basis for guiding economic development efforts toward these “targets of opportunity”.

Outer Banks Tourism Cluster

In 2015 the OBX tourism industry accounted for \$1.2 billion in expenditures, aggregate employment of 28,500 and a payroll of \$251 million in the combined area of Dare and Currituck counties. There are approximately 5,000 businesses in the OBX tourism cluster across six major industry classifications: Construction, Transportation, Wholesale and Distribution, Services, Retail and Finance, Insurance and Real Estate (FIRE). Most of these businesses are small and locally owned, with 80% having fewer than 10 employees (figure 6).



Lower Currituck Tourism Cluster Share Analysis

The number and nature of businesses active in the Outer Banks tourism industry cluster were analyzed to determine the number of Lower Currituck-based firms compared to the regional cluster firm population. This “share analysis” served both to calculate the extent to which the Lower Currituck economy currently benefits from Outer Banks tourism and to identify areas – cluster gaps – that might represent opportunity for business growth.

Despite Lower Currituck’s proximity to Outer Banks tourism activity there are significant gaps in its share of the businesses providing essential inputs to that cluster. A proportionality analysis of the Outer Banks tourism cluster finds that the business population of Lower Currituck is well represented by the presence of businesses in the construction, transportation and wholesale/distribution constituent sectors. But the area is home to disproportionately fewer businesses in the finance, insurance and real estate (-20), Services (-36), and Retail (-13) sectors (table 1).

TABLE 1		
Tourism Cluster Proportionality		
Outer Banks Tourism Cluster Constituent Sectors	Lower Currituck Business Ratio	Cluster Gap Business Population
Construction	153%	*
Transportation	105%	*
Wholesale/Distribution	143%	*
Services (including medical)	77%	36
Retail	91%	13
Finance, Insurance, Real Estate (FIRE)	43%	20

There are several immutable reasons impeding the area’s potential in “direct to consumer” retail business activity. e.g., low population density. It is less clear why the region is not home to more locations of locally-owned businesses in certain sectors serving the tourism cluster while being well represented in others. This disparity is strongly suggestive of an opportunity for Lower Currituck to attract more business locations in the Service and FIRE sectors, and to a lesser extent, the Retail sector (table 2).

Gaps in the Lower Currituck economy – such as a lack of local retail, grocery or medical services – impose higher costs in the form of inconvenience and inefficiencies for visitors and residents alike. The existence of these gaps represents not only a loss of revenue and employment but also erode the “quality of life” for Lower Currituck residents.

TABLE 2
<i>Tourism Cluster - FIRE, Service and Retails segments</i>
Building materials and hardware
General merchandise
Groceries and convenience
Automobile dealers and service stations
Apparel and accessories stores
Home furniture and furnishings stores
Eating and drinking places
Banks, credit unions, brokerages
Insurance carriers and agents
Real Estate holdings and management
Hotels and other lodging
Health services
Legal services
Educational services
Social services
Business services
Auto repair
Amusement and recreation services
Museums art galleries and gardens
Engineering, accounting and management services

Community Visioning

Building a roadmap to a more sustainable, resilient Currituck that is economically, environmentally and culturally healthy requires collaborative, community-based approaches that reflect the desires and concerns of the spectrum of stakeholders that comprise the broader community. At its essence, this study was a community planning effort that acknowledged the past, assessed the present and described the future desired by the citizens

of Lower Currituck. To secure critical citizen input the following steps were undertaken:

- County officials identified key opinion leaders from the business, government, non-profit and private citizen sectors.
- Questions developed as discussion prompts were shared with prospective discussants in advance of interviews
- Participants interviewed included broad representation of diverse stakeholder groups that reside and/or operate a business in Lower Currituck, including:
 - Natives and Awaysians
 - Cross-section of ages and genders
 - Land owners
 - Concerned Citizens
 - Local Government
 - Educators
 - Work in Lower Currituck or away
 - Small business
 - Retail
 - Services
 - Recreation
 - Agribusiness
 - Developers
 - Construction
- Extensive on-site and telephone interviews formatted to include both structured questions and open-ended discussions were conducted with 31 key informants to identify areas of concern and preferences for future development in Lower Currituck
- Additional input was gathered at a community meeting on June 20, 2016 where preliminary findings were presented

Common themes, concerns and priorities distilled from the individual responses and group discussion were synthesized into the consensus success matrix of highly desired outcomes that shaped the roadmap presented in this report.

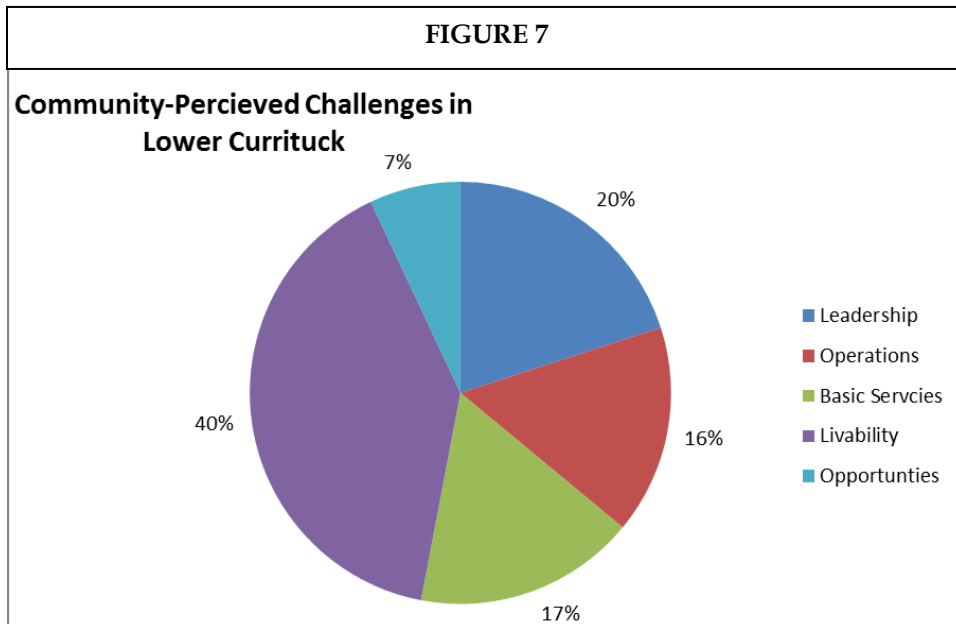
Community Visioning Interview Guide

The Lower Currituck community outreach effort was undertaken in part to give business and citizen stakeholders in this portion of the county an opportunity to express their views and concerns about the current situation in their community and their vision for what a successful and desirable future would look like. The following questions were provided in advance on the interviews to prompt thoughtful and complete responses and to ensure that the substance of individual responses could be captured in a format that facilitated comparison and synthesis across the complete set of collected information. Open-ended discussions provided additional context and tangential conversations that veered into more creative considerations of Lower Currituck's future.

- How satisfied are you with the local economy in Lower Currituck?
- How satisfied are you with the livability of the area?
- How optimistic are you about the economic future of Lower Currituck?
- Please identify the most positive local developments from the past 5 years?
- What are the largest challenges?
- Do you think these challenges can realistically be addressed by local government, including economic developers?
- What types of businesses or services should be targeted in recruiting efforts; i.e. what businesses or services are needed most in Lower Currituck?
- What should be the top priorities for growth and development in Lower Currituck?

Findings: Stakeholders Perception of the Current Situation

Stakeholders shared their perceptions and levels of satisfaction with the current status of the local economy and its future prospects (figure 7). Efforts were made to focus the conversation on Lower Currituck as opposed to the county generally or the broader coastal region, although there was inevitably some mixing of geographic contexts in the answers provided. There emerged a general view that the current economic situation is positive, due in no small part to the benefits that tourism continues to deliver to the county broadly. On a more parochial level, the consensus perception is that Lower Currituck is on the receiving end for many of tourism’s less-positive aspects, e.g., traffic and development pressures, even as it has not benefitted proportionately from the investments in public projects made possible by the revenue premiums arising from tourism. Too many of the basic services and retail needs of Lower Currituck citizens and businesses have to be acquired elsewhere. Many stakeholders point to the desirability of the place, if not the circumstances that detract from its practical livability, pointing to a future that could be threatened if adequate attention is not given to addressing the weaknesses identified in these interviews.



In general, **livability** issues reflected perceived shortcomings and irritations experienced in daily life; e.g., not being able to obtain goods and services locally and easily. **Leadership** problems primarily revolved around the perceived lack of long-range visions that are adequately concerned with the desires of stakeholders in Lower Currituck. **Basic services** that are often the direct responsibility or strongly impacted by government policies were cited frequently as inadequate. **Operations** related to dissatisfaction with the way local government conducts its business. **Opportunities** concern perceived shortcomings locally for employment and training. These five broad categorizations of problems and the specific issues cited by stakeholders that are subsumed under them are presented below (table 3). Note that absolute number of citations may be misleading. For example, while traffic was discussed in almost all interviews,

the relatively low number of times “traffic” was called out as a particular challenge may reflect stakeholders being resigned to what they see as an intractable problem. There is also some degree of interplay among the factors, such as instances when the mid-county bridge appears to be offered as a proxy for concern about traffic problems. If combined, citations for “Traffic” and Bridge” make this the most critical issue affecting life and prospects in Lower Currituck.

TABLE 3		
Frequency Chart of Concerns Identified by Citizens of Lower Currituck		
Weaknesses and Problems	Specific issue	Number of Citations
Livability (40% responses)	Inadequate shopping options	12
	Highway aesthetics, e.g. metal buildings	11
	Mid-island bridge	9
	Lack of hotel	6
	Traffic	5
	Lack of Marina	3
	Too few restaurants	3
	Lack of entertainment options	2
	Leadership (20% responses)	Short-term focus, lack of vision
Lack of representation for Lower Currituck on Commission		8
Anti-growth mentality dominates		6
Misplaced priorities – e.g. Rural Center		2
Basic Services (17% responses)	Housing – insufficient stock, unaffordable	9
	Medical services	7
	Education/Schools	5
Operations (16% responses)	Failure to provide adequate, affordable infrastructure	11
	Onerous, unresponsive, expensive permitting process	7
	2006 Land Use plan does not support growth in Lower Currituck	2
Opportunities (7% Responses)	Jobs	7
	Internships, opportunities for youth	2

While there was variety in stakeholders' vision of desirable futures, there was near unanimity in what was not wanted. In composite, the worst case future scenario described by stakeholders offers a vision where the mid-county bridge is not built, traffic worsens and spillover from the surrounding beaches and the northern end of the county is of a low-end variety characterized by cheap housing, unattractive strip malls and more metal storage buildings.

Strengths/Assets

Community stakeholders were remarkably consistent in their identification of positive developments and other factors, tangible and intangible, that are seen as assets to prospects in Lower Currituck. Place-based intangibles figure strongly in the aspects of the area that are viewed most positively. Foremost among these is the **natural beauty** and **environment** of the area and the **sense of community** that characterizes Lower Currituck. More tangibly, the availability of **affordable property** ranks highly as a perceived asset. The relatively recent addition of **public recreation** at *ball fields and the Y* and the **airport and associated training opportunities** it enables were also cited as positives, although it was noted by several stakeholders that none of these developments were situated in Lower Currituck. It is encouraging to note the congruence of Lower Currituck stakeholders' perceptions of assets and desirable futures with the findings and recommendations presented in the Currituck Geographic Vision Report.²

Community Desires

Stakeholders were asked to describe their "Blue Sky Future" vision for Lower Currituck. Responses were aggregated into five general categories that encompass the most broadly supported elements of the future desired by Lower Currituck residents and business owners.

- Healthy, sustainable communities offer citizens the **ability to live, work and play locally**. Lower Currituck stakeholders are unanimous in their desire for more retail, service and entertainment operations.
- Enhanced **education and workforce training opportunities** are seen as the foundation of opportunities and competitiveness. Lower Currituck needs to build on existing strong support for schools with significant improvements in performance. Expanded workforce training focused on supporting sectors targeted for development will create incentives to retain and expand local talent and help local businesses succeed.
- Economic and community development **that builds on and sustains Lower Currituck's environmental and geographic advantages** will define a future that is competitive and desirable.
- The "look" of the community in the future will be **more visually inviting**, with attractive

²Annex Geographic Vision Report Accessed at: <http://co.currituck.nc.us/pdf/planning-lup-documentation/GeographicVisioning.pdf>

design and landscape elements that build on rural and waterfront assets.

- Best practices will characterize **local government as a proactive, transparent and representative partner** working to secure the future that Lower Currituck desires.

Organizing Principal: Sustainable Development

The issues and opportunities articulated by Lower Currituck citizens are encapsulated well by 10 established principals of Smart *Growth* as applied in a sustainable coastal context.³ Smart Growth is concerned with making growth and development decisions that yield better economic, environmental, community and public health outcomes, a quadruple bottom line. The unique context of coastal communities puts a particular premium on growing in ways that are compatible with natural assets to create places that are great for residents, visitors and businesses. These principals include:

1. Mix land uses include water-dependent uses
2. Take advantage of compact community design that enhances, preserves, and provides access to waterfront resources
3. Provide a range of housing opportunities and choices to meet the needs of both seasonal and permanent residents
4. Create walkable communities with physical and visual access to the waterfront
5. Foster distinctive, attractive communities with a strong sense of place that capitalizes on the natural and waterfront heritage
6. Preserve open space, farmland, natural beauty and critical environmental areas that characterize and support coastal and waterfront communities
7. Strengthen and direct development towards existing communities and encourage waterfront revitalization
8. Provide a variety of land and water transportation options
9. Make development decisions predictable, fair and cost effective through consistent policies and coordinated permitting processes
10. Encourage community and stakeholder collaborations in development decisions ensuring that public interest in and rights of access to the waterfront and coastal waters are upheld

³NOAA (2009) "Smart Growth for Coastal and Waterfront Communities" Accessed at:

http://coastalsmartgrowth.noaa.gov/smartgrowth_fullreport.pdf. This interagency guide includes a description of tools and techniques for applying smart growth guidelines, with case studies illustrating the guidelines in action. For example, communities can (1) protect and restore natural buffers between the community and water; (2) align natural hazard planning with development plans; (3) promote waterfront revitalization, including retrofitting historic properties for new uses; and (4) provide a variety of land and water-based options that accommodate seasonal fluctuations in transportation needs. This guide was developed by EPA, the U.S. National Oceanic and Atmospheric Administration, the International City/County Management Association and the Rhode Island Sea Grant Program, in consultation with the national Smart Growth Network.

Lessons from Comparable Communities

Challenges facing Currituck are common to many coastal communities that confront the need to balance development with conservation of their most important asset – the natural environment. Also in common is a growing awareness of a longer-term, possibly existential threat posed by climate change. Much attention is being given at local, state and federal levels to identifying strategies that support the sustainability, both short and longer-term, of the coastal communities that are vital to environmental, economic and cultural health of the nation. Citizens in Lower Currituck are acutely aware of these pressures. They acknowledge the inevitability of change but have expressed a strong and active interest in charting a forward course that enhances the aspects of the community that they treasure.

Review of economic and research literature, in combination with recommendations from subject matter experts and local opinion leaders identified possible best practice communities that are pursuing promising growth strategies. The following discussion is organized around development strategies that align with stakeholder preferences and are compatible with the economic and geographic context in Currituck County. Best practice communities and programs relevant to each strategy are highlighted and links to related resources are also provided. Please note that several of the communities warranting particular attention are those that were identified previously as best practice models in studies for Currituck County overall⁴ and/or in the strategic planning effort currently underway in Dare County.⁵

Eco- and Heritage-Tourism

In 2001, the United Nation’s World Trade Organization identified “experiential” tourism (which encompasses ecotourism, nature, heritage, cultural, soft adventure tourism, rural and community tourism) as among the sectors expected to grow most quickly during the coming two decades.⁶ Experiential tourists seek memorable experiences that involve active participation, draws people outdoors and into cultures and communities.⁷ Multiple studies document the premium, financial and emotional, a growing proportion of tourists place on environmentally responsible travel to natural areas and their interest in conservation, education, traveler responsibility and active community participation.⁸ Essentially, experiential

⁴ Brent Lane and Jason Jolley (November 2008) UNC Center for Competitive Economies “Economic Development Strategy “Vision Plan” Currituck County, North Carolina Final Report” Accessed at: <http://co.currituck.nc.us/pdf/ed-news/Currituck%20Final%20Report%20November%202008.pdf>

⁵ Consultants on this project met with the team conducting the Dare County Strategic Planning effort on June 3, 2016 to share information.

⁶ United Nations World Travel Organization (2001) “Global Forecasts and Profiles of Market Segments.” Tourism 2020 Vision. Vol. 7. Madrid, Spain. 2001.

⁷ William L. Smith. 2006. “Experiential Tourism around the World and at Home: Definitions and Standards” International Journal of Services and Standards. Vol. 2, No. 6. Emporia State University. Emporia, KS. p. 14

⁸ Center for Responsible Tourism (April 2015) “The Case for Responsible Tourism: Trends and Statistics 2015”. Accessed at: [http://www.responsibletravel.org/news/Fact_sheets/Crest_RTI_TrendStats_print_1_4%20\(3\).pdf](http://www.responsibletravel.org/news/Fact_sheets/Crest_RTI_TrendStats_print_1_4%20(3).pdf)

tourists seek authentic and memorable, hands-on experiences (table 4).

TABLE 4
Elements of Experiential Travels
Ecotourism training
Kayak trails
Wildlife photography
Nature-based web cams
Heritage foods classes
Agritourism
Fishing tournaments
Cross-country bike races
Archeology field schools
Biodiversity inventories
Citizen Science programs
Filed-based STEM programs

For years, development in Currituck has been on the beaches at the eastern edge and in Moyock, near the Virginia border, leaving significant portions of the county’s estuaries, rivers, sounds, and forests in a relatively undeveloped state, rich in wildlife and natural beauty. Building on its heritage of hunt clubs, fishing and agriculture, Currituck has enormous undeveloped potential as an eco- and heritage tourism magnet. Experiential tourism has the further advantage of not being limited to one season, opening up the possibility of using existing tourist housing stock and other infrastructure to support this cluster of activities in the shoulder seasons. The small scale operations favored by eco- and heritage tourists fit well with the small, entrepreneurial and lifestyle ventures that already characterize many of the businesses in Lower Currituck.

A limited number of ventures of this sort that already exist in Currituck County are scattered, one-off efforts that lack the scale to be significant. A focused strategy to create, develop and market a deep and broad portfolio of experiential options will be required to energize the development of this nascent cluster for a more sustainable future. Fortunately there are many external resources that can be engaged from governmental and non-profit organizations interested in encouraging smart, conservation-oriented growth. Coastal communities that have already committed to this path offer models and best practices that are described below.

Down East Maine (rural Hancock and Washington counties, including Acadia National Park): The link between sustainability and economic returns is strong: research conducted for Down East Maine found that the 140 million Americans interested in nature tourism and/or historical/cultural travel spent twice the average amount tourists typically spend in Maine. The dominance of Bar Harbor and Acadia National Park as magnets for visitors to the region led local leaders to work with state officials to explore how to optimize tourism as an economic

development engine in other parts of the region and state. What emerged was a detailed, action-oriented plan to encourage “greener” tourism and develop a portfolio of experiential activities to attract environmentally aware tourists.⁹ Three multi-faceted pilot programs were initiated, including one in the Down East region. The success of the effort was documented in a final program evaluation that is an excellent resource for communities undertaking a sustainability-focused approach to enhancing their tourism economies.¹⁰

Tyrrell County NC recognized that their primary asset is their “Gateway to the Sounds” environment: wetlands that are home to more than 20 endangered species comprise 85 percent of the county’s land area. Tyrrell is the first county in the state to formally adopt ecotourism as an economic development strategy. A proactive Ecotourism Committee spearheads this initiative. Membership in the committee draws from local, state and federal government agencies, non-profits and local businesses representing the Center for the Sounds, Pocosin National Wildlife Refuge, Pettigrew State Park, the Red Wolf Recovery Program and the 4-H Environmental Education and Conference Center. An attractive, user-friendly web portal links visitors to a growing portfolio of eco-tourism activities in the county.¹¹ Strong support for adoption of this strategy was provided by research conducted in 2005 that examined both sides of the feasibility equation: local interest in pursuing an ecotourism strategy and the appeal this sort of activity holds for visitors to the Outer Banks. Results from this survey pertain directly to the feasibility of drawing visitors to the mainland for nature and cultural experiences.¹² Taken together these models suggest that ecotourism has potential in northeastern North Carolina and that Currituck, Tyrrell, and neighboring counties should collaborate across borders to develop a regional eco/heritage tourism brand.

A Focus on Local Foods: Farm-to-Table, Farm-to-Schools, Locavore Vacationers and Culinary Schools

Across America an unprecedented demand for local and regionally identified foods is causing communities to reconsider the role that food systems can play in charting a more sustainable and healthier future. The basic concept is to localize more elements of the food system by creating stronger connections between local farmers, consumers and food businesses. A food system is defined as the production, processing, distribution, sales, purchasing, preparation, consumption, and waste disposal pathways of food. Within each of these sectors and pathways, there are opportunities for job creation, business incubation and expansion, health promotion,

⁹ Fermata, Inc. (September 2005) “Strategic Plan for Implementing the Maine Nature Tourism Initiative” Accessed at: <http://www.nmdc.org/reportsstudies/maine/naturetourismstatestrategicplan.pdf>

¹⁰ Maine Nature-based Tourism (November 1, 2010) “Report on Maine’s Nature-based Tourism Initiative” Accessed at: (<http://www.nmdc.org/reportsstudies/maine/naturetourismstatestrategicplan.pdf>

¹¹ Tyrrell County Ecotourism Committee website, accessed at: <http://www.ecotourismnc.org/> and <http://www.visityrrellcounty.com/ecotourism/StoryIdeas.htm>

¹² Defenders of Wildlife (February 2005) “Red Wolves Creating Economic Opportunities through Ecotourism in Rural North Carolina”. Accessed at: https://www.defenders.org/publications/red_wolves_creating_economic_opportunity_through_ecotourism_in_rural_north_carolina.pdf

improved access to healthy, nutritious food, enhanced environmental stewardship and economic success.¹³

Proximity to sophisticated consumers vacationing on the coast and up-scale restaurants and markets in the Outer Banks and Tidewater Virginia, a rich agricultural heritage, and a coastal climate that supports production of a broad range of fruits, vegetables, honey, livestock and seafood makes Currituck County well suited to benefit from this emerging cluster. Entrepreneurs already established in Lower Currituck, the Weeping Radish and Sanctuary Vineyards are modeling the path that other farmers in Currituck could follow.

A food-themed future for Lower Currituck is highly congruent with the values and preferences expressed by local stakeholders. At the limits, this scenario could encompass smaller, specialized farms, breweries, seafood and aquaculture operations working with local entrepreneurs in certified community kitchens and food processing facilities to deliver high quality products to consumers, restaurants, institutions and businesses throughout the region. Strengthening existing farms and seafood operations and evolving output to products that are closer to the table offer these advantages:

- Maintain rurality of the community
- Increase the availability of local retail and decrease economic leakage by providing food products that are more diverse, fresher and of higher quality to consumers, restaurants food processors and institutions (schools, hospitals, prisons).
- Improve and extend the value of the tourism sector through enhanced opportunities for heritage/agri-tourism, food and wine festivals, culinary vacations, etc.
- Create attractive training and career opportunities for local youth – Across the country millennials are active players in the local foods movement. This is important to sustaining a sector that is threatened by development pressures and aging population of farmers (farmers in Lower Currituck are 57 years old on average versus an overall median age in the county of 39)
- Strengthen the competitiveness of local restaurants
- Allow Lower Currituck to “grow its cake and eat it too”.

Examples and best practices for pursuing a foods-based growth strategy can be taken from efforts underway in other coastal communities that face many of the challenges and constraints confronting Lower Currituck. Goals for these efforts include self-sufficiency, stopping economic leakage, sustainability, fit with community values, minimizing changes in statues and partnering with non-profit conservation, state and federal organizations to leverage support and resources.

¹³ American Conservative (April 29, 2014) “Locavore Revolution: Can locally-sourced be good for business?” Accessed at: <http://www.theamericanconservative.com/articles/locavore-revolution/>

TABLE 5
Economic Impact of Local Foods
<ul style="list-style-type: none"> • Small farms make 95% of their purchase locally • Local food systems have a multiplier effect of \$2.6 for each \$1 earned • NC households dedicating 10% of their food budgets to local purchases would inject \$3.5 million into the state’s local economies.

Martha’s Vineyard, Massachusetts is an excellent case study in citizen-led planning overall and specifically to the integrative role a strategy of invigorating local foods can play in charting a better path forward.¹⁴ Highlights of outcomes from a 3-year planning effort include a land bank that leases land to aspiring farmers, farm-to-school programs to provide healthy foods to students and dependable markets to farmers, a mobile processing trailer that services poultry farmers, shared cold storage facilities, agritourism marketing program, establishment of a non-profit farm institute and food cooperative to provide training and support to small farmers, and establishment of the *Island Grown Initiative* to promote awareness among residents and vacationers. Through active web-marketing, direct sales and CSAs more than 3 dozen providers now sell fruits, vegetables, meat, poultry, honey, cheese, oysters and seafood directly to 17,000 year-round residents, vacationers and restaurants on the island and regionally.¹⁵

At the firm level, a model for creative use of under-utilized public resources to support food is found in **Beaufort South Carolina** where a fledgling aquaculture venture is being allowed to lease undeveloped property at an under-utilized industrial park. Port Royal Sound Shrimp, “fresh, never frozen”, will harvest 2,000 pounds of shrimp each week to be sold at \$16 per pound to markets within a 36-hour delivery window – Charleston, Savanna and Atlanta.¹⁶ The sort of fine dining that this type of venture depends on also works in rural North Carolina, as evidenced by the success of a growing number of restaurants whose brand is inextricably tied to the use of the best locally-sourced ingredients.¹⁷ Strong word-of-mouth and social media presences draw visitors from great distances to enjoy the food and the rural setting.

An example of the broader potential that a food-based growth strategy enables is found in **Hilton Head South Carolina** where the development of culinary schools and culinary vacations builds on the food heritage of the region and the availability of high quality, fresh local foods to

¹⁴ Martha’s Vineyard Commission (2010) “The Island Plan” Accessed at: <http://www.islandplan.org/doc.php/Island%20Plan%20Web%20Version.pdf?id=2560>

¹⁵ In contrast, Currituck County has only 5 entries on the Local Foods Map maintained by the NC Cooperative Extension Service, include the Weeping Radish and Grandy’s Seafood

¹⁶ The Beaufort Gazette (June 26, 2016) “Pool-to-table Shrimp in Beaufort County/ It could Happen” Accessed at: <http://www.islandpacket.com/news/local/community/beaufort-news/article85353752.html>

¹⁷ For example, nationally-acclaimed *Farmer and Chef* in Lenoir County, *On the Square* in Edgecombe County, and *Patricia’s Grill* in Hertford County.

attract aspiring chefs for training and locavore tourists. The distinctive “hook” that draws both types of students is the opportunity to gain skills with a focus on regional low-county cuisine and seafood preparation in an attractive setting. The region gains a skilled workforce and vacationers gain an experiential heritage opportunity. In Currituck, similar opportunities do not exist; the closest culinary training programs are general culinary diploma and certificate programs at the Edenton campus of the College of Albemarle.

Local Foods Resources: The Mayor’s Innovation Project, a learning network among America’s mayors, provides an excellent primer on the economic development case for local food initiatives, including guidelines for implementing this strategy.¹⁸ Planning, tactical, programmatic and financial support to encourage local food initiatives is available from state, federal non-profit organizations. The Golden LEAF Foundation, the NC Rural Center and the NC Cooperative Extension Service have a number of active efforts underway in this arena,^{19,20,21} often in partnership with the United States Department of Agriculture (USDA). USDA provides an excellent decision tree that guides prospective grantees to appropriate federal local food development support programs.²²

Vibrant Villages

A surprisingly consistent picture emerged from the community engagement process that anchored this study: *people in Lower Currituck desire growth and development while maintaining the distinctive natural environment and rural character of their community* –place-based economic development. During the community input interviews the strengths, weaknesses and desired futures described by dozens of Lower Currituck stakeholders pointed to a vision of attractive, vibrant, walkable communities that support a variety of businesses and recreational activities. Aesthetics are important and the value placed on maintaining the natural environment is high. Communities identified by stakeholders as idealized models for future Lower Currituck – Hilton Head and Beaufort South Carolina, Williamsburg Virginia and

¹⁸ Mayors Innovation Project (March 2014): “Local Food and Economic Development”

http://www.mayorsinnovation.org/images/uploads/pdf/Food_and_Economic_Development_Brief_updated.pdf

¹⁹ Connect Our Futures (July 2014) “Food System Assessment Report: Accessed at:

<http://www.connectourfuture.org/wp-content/uploads/2015/01/CONNECT-FS-Food-Systems-Assessment-Report.pdf>

²⁰ Launched in 2010 by the NC Cooperative Extension Service with funding from Golden Leaf, the NC 10% Campaign has helped grow N.C.’s economy by challenging N.C. residents to spend 10% of their food dollars locally to support producers, businesses, and communities. Each week, an email was sent to the participating residents with a few questions about where they spent their money on food. After a year of tracking more than 4,000 N.C. residents, they found that more than \$5.7 million went to purchasing local foods. Even a few restaurants and large businesses in N.C., such as Piggly Wiggly and Whole Foods Market, took the 10% pledge. The campaign is ongoing and expanding. See: <http://www.nc10percent.com>

²¹ NC Cooperative Extension Service (2013) “A Community and Local Government Guide to Developing Local Food Systems in North Carolina” Accessed at: <https://cefs.ncsu.edu/resources/a-community-and-local-government-guide-to-developing-local-food-systems-in-north-carolina-2013/>

²² USDA guide to funding Local Foods and Local Food Markets programs: see

<https://www.ams.usda.gov/services/grants> and

<https://www.ams.usda.gov/sites/default/files/media/Combined%20Grants%20Decision%20Trees.pdf>

Beaufort, North Carolina – reflect the active village image.

The concept of *Smart Growth*, usually discussed in an urban context, can be an important tool for helping rural communities achieve their goals for growth and development while maintaining their distinctive rural character by:

- Planning where development should or should not go to help a rural community encourage growth in town, where businesses can thrive on a walkable main street and families can live close to their daily destinations.
- Identifying policies that protect the rural landscape, help preserve open space, protect air and water quality, provide places for recreation, and create tourist attractions that bring investments into the local economy.

The relevance of Smart Growth strategies to Lower Currituck stakeholder-articulated concerns and preferences is obvious when mapped against the following checklist of strategies, policies and regulations that support application of this best practice:²³

- Create/Revitalize town centers
- Encourage infill and mixed-use development
- Designate and communicate growth areas
- Price impact fees and utility hookups according to distance from growth area
- Provide density bonuses for multi-unit/multi-tenant/multi-purpose buildings
- Allow variable lot size to sustain outlying agricultural character
- Adopt agricultural/open space zone policies process
- Minimize setbacks in town centers
- Adopt policies and codes to ensure windows or active uses in building facades
- Screen parking lots and apply green infrastructure rules
- Establish outdoor dining codes
- Implement pedestrian-oriented street design
- Strengthen the local economy by streamlining the development review
- Provide incentives to attract and maintain local businesses, particularly those that employ local residents

While Smart Growth has been applied to guide urban growth since the early 1990s, its adoption for use in rural settings is a relatively recent phenomenon. It is often applied to specific, limited planning efforts, but its real value results when it becomes the organizing principle that guides strategic visioning or complex planning and development efforts. Currituck County currently designates much of Lower Currituck as “Limited Service” areas, which may not easily reconcile

²³file:///C:/Users/Ad/Downloads/10-180%20Smart%20Growth%20Rural%20Com.pdf

with the desire of many in Lower Currituck for more development concentrated in village-like settings surrounded by protected farm and green space. Examples of comparable communities that are actively following Smart Growth strategies to revitalize and become more sustainable are discussed below.

Everything is relative, so while **Cape May County, New Jersey** has almost 4 times as many people on approximately the same land area as Currituck, it is considered very rural and sparsely populated when compared to the neighboring New York/Newark/Philadelphia metro areas. Development pressure is high, as is the interest in maintaining its rural culture and environment. Cape May also resembles Currituck in the sectors that are the focus of its economic development – aeronautics, recreation and entertainment, aquaculture and wine.

Cape May is aggressively pursuing a comprehensive Smart Growth strategy that includes establishing standard design elements for redeveloping its vintage housing stock; facilitating development of the ecotourism sector through focused marketing; proactively supporting agri-tourism and value-added production by providing centralized shared refrigeration, packaging and processing facilities and by making agri- and ecotourism an explicit focus of their comprehensive resort marketing program; protecting views, greenways and farmland through restrictions on development; and land banks established to acquire strategic properties threatened by development. Cape May's history with waterparks may be instructive to Currituck, both the successful ones in operation and a giant waterpark (81,000 square feet in Phase 1) and an adjacent 800-room hotel that was approved in 2015 but withdrawn this year after failing to secure necessary funding.^{24,25}

Pamlico County, North Carolina faced serious traffic problems related to Highway 55, which passes directly through several small communities on the way to the coast in a situation analogous to the Highway 158 Currituck County. On-the-ground technical assistance from a team of national experts was provided by the United States Environmental Administration (EPA) "Smart Growth Implementation Assistance Program for Coastal Communities". This arm of the EPA is concerned with helping communities develop and implement efforts to achieve economic growth in concert with environmental protection.²⁶ The resulting technical report/plan provides best practice options for transforming a transportation nightmare into a Smart Growth asset.²⁷ Review of this plan could be especially beneficial given the road changes that will occur with the construction of the mid-county bridge.

²⁴ "What to Do in Cape May" Accessed at: <http://www.capemay.com/play/category/theme-parks/>

²⁵ Money (January 5, 2016) "No water park, new sale for Atlantic property, owner says" Access at: http://www.pressofatlanticcity.com/business/no-water-park-new-sale-for-atlantic-club-owner-says/article_1d1d9760-b33d-11e5-bec8-1b368e349a52.html

²⁶ U.S. EPA Smart Growth Assistance web portal, accessed at: <https://www.epa.gov/smartgrowth/smart-growth-implementation-assistance> . Note that beginning in 2015 the EPA no longer solicits RFPs for this program but instead select communities for assistance based on recommendations from its regional staff.

²⁷ U.S. EPA (July 20, 2008) "Retaining our Sense of place by Managing Our Highway" Accessed at: https://www.epa.gov/sites/production/files/documents/pamlico_county.pdf

A prominent feature of sustainable, future-oriented communities is the use of natural corridors, greenways and open land to connect compact communities to their natural resources and each other. This strategy attracts families, retirees and life style entrepreneurs and small businesses, all segments identified by Currituck stakeholders as desirable. **Hilton Head, South Carolina** pioneered this strategy in a model that has been cloned on Amelia Island, Kiawah Island, Bald Head Island and other remote, rural coastal areas. Hilton Head is again providing a model for adaptive change as it turns challenges into opportunities. Faced with declining growth and property values, Hilton Head is strategically acquiring properties to secure and expand their open spaces and ensure the environmental health of their region. Many of the best practice communities cited in this study are following a similar strategy; for example, Cape May. Partnerships with conservation groups and foundations, preservation trusts, and land banks funded by small set asides from occupancy taxes enable these acquisitions. Leases for targeted purposes, such as specialty farms and ecotourism operations, serve the dual purpose of supporting small business development and generating revenues that feed back into the land bank.

The Case for Smart Growth in Currituck:

As described in the Environmental Impact Report for the proposed mid-island bridge, the growth trends assumed in Currituck land use plans, with a horizon year of 2025, does not appear to be sustainable to 2035 on the Currituck County mainland. This report stated that if plan densities and growth continue, then most land suitable for development, including land designated as Rural Areas in the current plan, would be developed. The citizens of Lower Currituck intuitively understand that the future they desire will be more difficult to attain without conscious and sustained commitment to Smart Growth. Fortunately there are many resources, informational and financial, available to help Currituck move in that direction. Of particular note are the on-line toolkits that provide extensive background, checklists, best practice case studies and step-by-step action plans that were developed by the Environmental Protection Agency²⁸ and by the International City/County Management Association (ICMA).²⁹ Currituck County has in place a Unified Development Ordinance that includes planned unit development (PUD) provisions as well as a Farmland Preservation Ordinance. Creative application of these policies and regulations could better support the future Lower Currituck want.

²⁸ The U.S. EPA offers a wealth of resources related to Smart Growth for small and rural communities. Accessed at: <https://www.epa.gov/smartgrowth/smart-growth-small-towns-and-rural-communities>

²⁹ ICMA (2010) "Putting Smart Growth to Work in Rural Communities" Accessed at: <file:///C:/Users/Ad/Downloads/10-180%20Smart%20Growth%20Rural%20Com.pdf>

Lower Currituck Success Matrix

The Lower Currituck Success Matrix is a template for differentiating among the multiple factors that determine the viability and desirability of economic development prospects. It is constructed by juxtaposing the articulated economic development outcomes priorities (Preference) identified through the community engagement process with viability of those development outcomes (Market) as demonstrated by examples of realized results from communities economically comparable to Lower Currituck.

The Community Preference Elements outcomes identified during the Community Engagement and their associated values are described in Table 6 in order of highest assessed preference. The elements were also quantified in terms of their relative Market validation (10 = highest) derived from the frequency of their existing occurrence within the OBX economy and/or within Lower Currituck and their relative economic Significance (3 = highest) derived from the demonstrated scale of such occurrences.

Community Preference Outcomes Metrics			
Local Retail	10	4	2
Vibrant Villages	10	2	3
Fast Internet	9	0	2
Medical Services	8	8.5	2
Locavore restaurant	8	6	1
Hotel	8	3.75	1
OBX Farm/Table	7.75	2	2
Eco Resort	7	1	1
Waterpark, etc.	6	10	2
Vacation Rentals	6	7	2
Heritage Attraction	6	4	1
Culinary Training	6	2.5	1
Beautify 158	6	0	2
Storage	4	10	1
Retail Strip	3.5	6	1
Stagnation	3	3	3
Subsidized Housing	2	9	3
Traffic	1	7	2
Land fill	1	2	1
Hog Farming	1	0	2
Adult Entertainment	0.5	4	1
Decay	0	6	1

Community Preference Elements vary widely in Significance (return) and Market validation (risk). These values are applied later in this report – as in the manner of risk-adjusted financial assets valuation – in the construction of the Lower Currituck economic development portfolio. Those with more speculative Market value would require more proactive economic development effort, and therefore cost, to pursue. Those with higher Market values might be cost effectively addressed through planning regulatory efficiencies.

Navigating the Lower Currituck Success Matrix

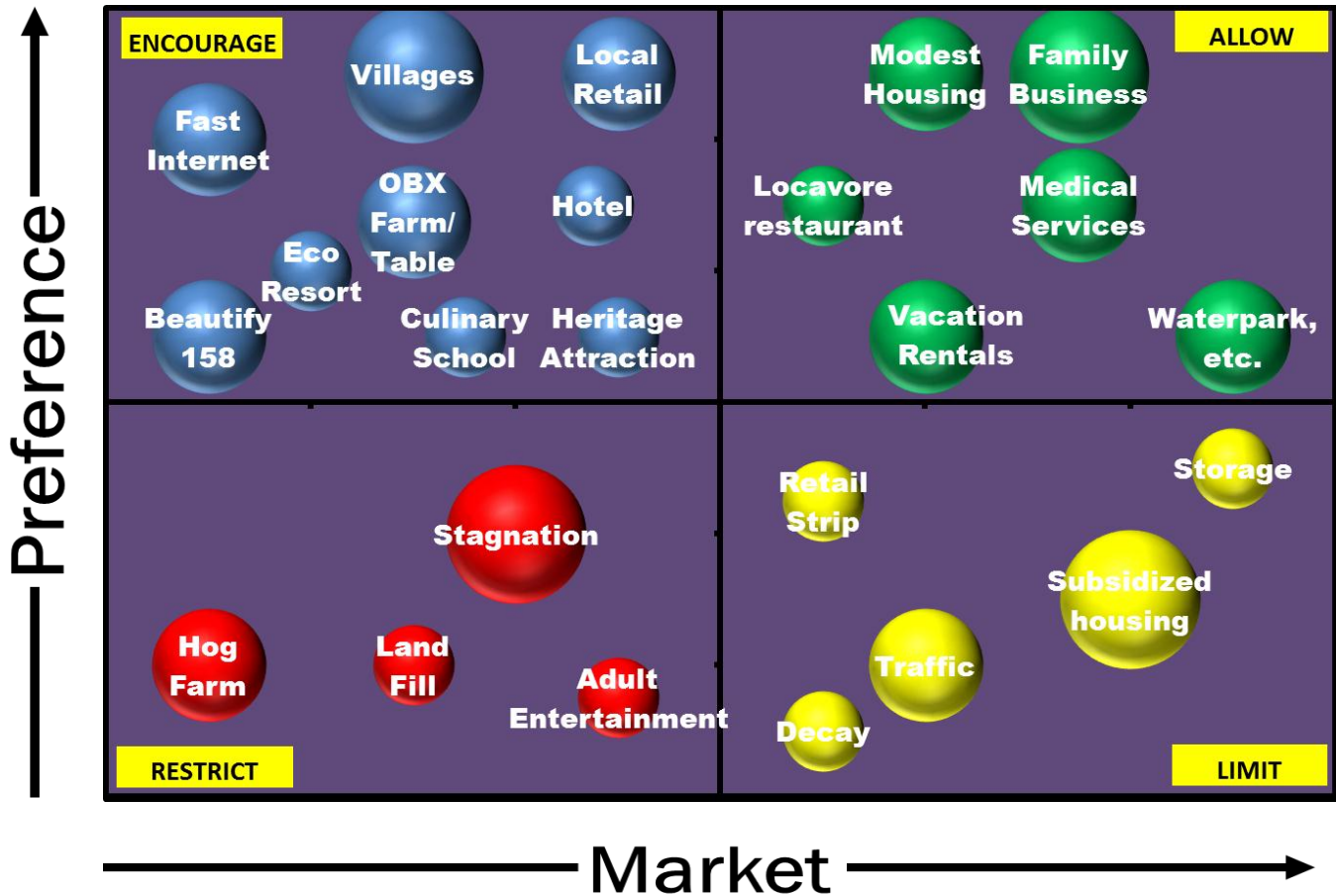
Juxtaposition of community preference, OBX market validation and significance allows strategic and tactical categorization of potential development outcomes, creating a success matrix that is highly customized to Lower Currituck. The intent of the produced “Success Matrix” is to provide a graphical structure to:

- differentiate outcomes requiring proactive economic development vs. efficient economic growth governance policies
- calibrate expectations of the likelihood of success among stated preferences
- provide basis for allocation of effort and assessment of achievement
- aid economic futures planning through comprehensive assessment of varied initiatives and their individual and collective significance.

Examples of identified economic outcomes were assessed Preference and Market values on a scale of 1 to 10, as captured in Table 6. They were then plotted on the Success Matrix to provide a graphical representation of relative attainable community desired outcomes. The Success Matrix incorporates a third informational element – an assessment of the relative economic significance of the outcome on a scale of 1 (low significance) to 3 (high significance). These Significance values are reflected in the size of the circle representing the outcome on the Success Matrix. (figure8)

The matrix is constructed on two axes. The X axis denotes increasing viability (Market) of desired outcomes based on their validation by relevant market realizations. The Y axis denotes the increasing level of articulated community priority (Preference)

FIGURE 8
Lower Currituck Success Matrix



The result is a matrix of four quadrants that provides clarity to the challenge of addressing community expectations responsively and realistically while achieving public ownership of the definitions of success. The quadrants are labeled based on the policy inclination required:

Encourage: this quadrant is defined by higher Preference values (>5) but lower Market values (<5) indicating that proactive economic development efforts will be required to achieve community priorities. The lower Market value does not necessarily denote a lack of viability, but does indicate that the outcome is more speculative as market forces are less oriented to a Lower Currituck location.

Allow: this quadrant is defined by both higher Preference values (>5) and higher Market values (>5) indicating that proactive economic development efforts are

less important than facilitating market behavior through efficient and responsive regulatory administration of current applicable planning and permitting policies.

Restrict: this quadrant is defined by both lower Preference values (<5) and lower Market values (<5) indicating that the economic outcomes are opposed by the community and, while unlikely to occur, these outcomes should be proactively anticipated and prohibited by planning and permitting policies.

Limit: this quadrant is defined by lower Preference values (<5) but higher Market values (>5) indicating that market forces are likely to direct these outcomes to the area but while they may be necessary and useful, these outcomes are not highly desired. The appropriate public response would be consistent adherence to directive planning and permitting policies that mediate potential negative impacts.

Lower Currituck Economic Strategy Route Map

At its best, economic development is a means of community directed economic self-determination. But getting from “Here to There” requires an understanding of Lower Currituck’s current status and the definition of a preferred economic future. The Economic Scan was performed to provide a picture of the area’s *economic* status and the Community Engagement findings delineated a consensus on preferred economic outcomes.

The final stage of the project was to design a Lower Currituck economic development “Route Map” to conceptualize the path(s) that could achieve the community’s prioritized economic development outcomes. Put simply, the “Route Map” depicts the economic policy path intended to arrive at the economic destination desired by citizens of Lower Currituck.

The “Route Map” was developed by:

1. Goal Definition: Defining a communal goal for economic policy is essential to developing strategies that, if successful, might achieve the desired results. The set of community preferred outcomes identified in the Community Engagement process were compiled to describe the quantitative parameters and qualitative context of consensus-desired economic future (see table 6).
2. Virtual Portfolio: In addition to preferred outcomes several individual tactical elements emerged from the community engagement. These elements were analyzed and characterized by preference, viability and economic significance into the Success Matrix framework (see figure 8). These Success Matrix options were synthesized into a “Virtual Portfolio” of prioritized economic outcomes and their expected economic “rate of return” weighted by market-viability assessments (see table 7). The Virtual Portfolio of economic growth and development was analyzed to determine the sufficiency of its aggregate Expected Rate of Return to achieve the quantitative dimensions of the community’s prioritized economic development outcomes.
3. Route Map: The Lower Currituck Virtual Portfolio’s strategic elements were mapped onto the Future Land Use plan for Lower Currituck to assess applicability and to identify potential requisite actions.

Goal Definition: Setting Lower Currituck’s “Target Rate of Return”

When communities consider and adopt economic development plans they are effectively – but usually unknowingly – buying a portfolio of projected outcomes. This is directly analogous to building an investment portfolio in that one allocates an investment amount into a variety of activities that offer differing expected rates of return. In an investment portfolio, such as a 401(k) retirement account, one would have

a desired overall rate of return sufficient to provide for financial needs. That Portfolio Expected Rate of Return would be the sum of the expected returns from the various investment types, adjusted for the probability of achieving those results. Some of the portfolio investments would be safe assets – government bonds for example – that offer a high probability of a low rate of return. Others would be more speculative or “risky”, but offer higher potential payoffs.

The first questions an investor advisor should ask a new client are their investment return goals and when they must be achieved. These fundamental questions form the foundation of portfolio construction. For the areas of North Carolina that are struggling those answers often are “any growth and jobs as soon as possible”. In those circumstances the portfolio options are extremely limited, which is why short-term solutions such as incentive-driven industrial recruitment – despite their unlikely chance of success – dominate most economic development thinking.

Lower Currituck has a different situation. Although individual circumstances vary, as a whole the area has a long-term challenge as opposed to an immediate one. The Economic Scan revealed that the area is currently growing in population and employment but is lagging its neighbors in median household income growth. The Community Engagement further found that new job creation is less a priority than improving the quality of employment and upward mobility opportunities for existing families. This suggests that Lower Currituck’s “economic return” goal is less about short-term development and employment growth and more about longer-term sustainable development leading to improved economic well-being.

The Community Engagement process outlined a 10-year consensus vision of a preferred economic future summarized by the Consultants as a:

“diversified, value-added economy achieved through sustainable growth consistent with the region’s natural resource preservation culture and strong sense of community”

The high-priority outcomes specified by a consensus of Community Engagement participants included a mix of qualitative and quantitative objectives:

- Increased intra-county employment and upward mobility for current residents
- Enhanced earnings and wealth creation through entrepreneurship
- Reduced commuting times for employees and customers
- Community-oriented employers with investment in shared values
- Sustainable locally-committed businesses with small-footprint facility locations
- Education and employment advancement for area youth

- Enhanced distinctive individual communities
- Preservation of area natural/cultural heritage

Quantifying Economic Success

As with an investment advisor working with a client, the challenge addressed in this project was to provide Currituck County officials with quantifiable economic goals achieving their citizens' "expected rate of return". Quantifying that goal is a prerequisite for constructing a policy portfolio that if successful would shape Lower Currituck's future economy in accordance with its citizens' priorities. The target outcomes selected for the Lower Currituck Route Map were drawn from these community-articulated priorities:

Target: Achieve Lower Currituck OBX tourism cluster business share parity

The Economic Scan found that Lower Currituck is home to fewer than its share – based on relative population – of businesses that constitute the Outer Banks tourism industry cluster economy. As a consequence the region has a less diversified economy with fewer current and future employment and income opportunities. Over the long term Lower Currituck would seek the attraction and development of 70 businesses in the Service, Retail, Finance, Insurance and Real Estate sectors where Lower Currituck is underrepresented in the OBX tourism industry cluster.

Target: Achieve 10% Lower Currituck employment growth

Although unemployment in the region is comparatively low, most citizens must commute outside of Lower Currituck for employment. A priority identified by Lower Currituck citizens was to increase the number of new jobs located within the region itself. Such growth would provide entry-level and upward employment opportunities for existing residents while reducing commuting costs and time. Over the next 10 years Lower Currituck would seek to increase intraregional employment by 10% through the attraction and development of 400+ new jobs, primarily filled by existing residents.

Target: Achieve Lower Currituck income parity with Currituck County

As described in the Economic Scan, the median household income (MHHI) in Lower Currituck is significantly less than the average for the county and has been growing more slowly than the rest of the county. In 2013 at \$50,501 MHHI in Lower Currituck was \$6,559 less than that of the whole county. Over the next 10 years Lower Currituck would seek to increase Lower Currituck income to parity with that for Currituck County through economic growth, yielding an additional \$20 million in annual income.

Lower Currituck Economic Development Virtual Portfolio

Different investors can have widely varying “investment profiles” that define their preferences in investment decisions. Investment profiles typically vary based on investors’ tolerance of risks, opting for either safer or more speculative positions. Investors may also assert strong preferences for or against certain types of industries, opting perhaps for a green, sustainable industry position or one with particular geographic foci. They typically vary widely in their investment “time horizon”, the total length of time that an investor expects to hold a portfolio, until they must achieve their returns. The challenge is to build an investment portfolio with the right combination of safe, low-return assets with more speculative, higher-return assets to achieve the Portfolio Expected Rate of Return at the time it is needed to attain financial security.

Elected officials face a similar challenge in making public policy decisions that affect the economic well-being of their citizens. This is made more explicit in the devising of land use plans, regulations and economic development plans, where the effects of such decisions have direct ramifications on the type of development to be encouraged, allowed, restricted or limited. Collectively those decisions constitute an “economic growth” portfolio that implicitly shapes the economic futures of their citizens. But rarely, however, do elected officials have the benefit of the type of information one would use in similarly constructing an investment portfolio with the intention of achieving an explicit result.

With an established economic rate of return goal and time horizon it is possible to construct a “virtual portfolio” based on the higher preference targets incorporated in the Success Matrix. As with the construction of an actual investment portfolio, one seeks to build a combination of risk-adjusted rate of return options consistent with investor preference that achieved the total expected rate of return. The expected economic rate of return for the portfolio elements were calculated individually and then aggregated to estimate the cumulative portfolio expected return.

The Community Engagement process had identified fifteen preferred individual tactical elements. These elements were analyzed and characterized by Preference, Viability and Economic Significance into the Success Matrix framework. These Success Matrix elements were synthesized into a “Virtual Portfolio” of prioritized economic development tactical elements and their expected economic “rate of return” when weighted (discounted) by market-viability assessments (table 7). The elements were also categorized based on market viability determinations as either Market-Driven or Market-Development options. The Virtual Portfolio of economic growth and development was analyzed to determine the sufficiency of its aggregate Expected Rate of Return to achieve the quantitative dimensions of the community’s prioritized economic development outcomes.

Portfolio Construction Illustration – Family Business OBX Cluster Growth

The portfolio construction process is illustrated by the example of the most preferred economic growth tactical element of the attraction of the offices and residences of Family-owned Businesses that serve the OBX tourism industry cluster. As summarized in the Virtual Portfolio (Table #) the Community Engagement process assigned the family-owned business element a high Preference value (10), while the Economic Scan assigned a high Viability value (9) and Economic Significance value (3) because of the market-validation demonstrated by the area’s base of such establishments. While Lower Currituck is underrepresented in some sectors of the OBX tourism industry cluster it is already home to 495 businesses within that cluster. The great majority of these business are locally owned and while individually small (<10 employees), in the aggregate nonetheless made a substantial economic contribution.

The Family Businesses element was characterized as a “Market-Driven” tactic in that it is the action of the OBX economy itself that provides the impetus for the attraction and establishment of numerous businesses whose owners might chose Lower Currituck as a home for their families and as a base of operations from which their businesses serve the OBX region. Over the long term Lower Currituck might eventually achieve absolute OBX cluster proportionality through the establishment or location of 70 additional, mostly small, businesses in the FIRE, services and retail sectors. However, the ten-year horizon of the Virtual Portfolio forecast the addition of 50 such businesses with the economic outcomes of an Employment Expected Return of 340 jobs and an Income Expected Return of \$13,600,000.

TABLE 7					
Lower Currituck Virtual Portfolio Expected Returns					
Outcomes	Market	Preference	Significance	Employment Expected Return	Income Expected Return
Family Businesses	9	10	3	340	\$ 13,600,000
Modest Housing	7	10	2	35	\$ 1,050,000
Local Retail	4	10	2	80	\$ 2,400,000
Vibrant Villages	2	10	3	N/A	N/A
Fast Internet	0	9	2	N/A	N/A
Medical Services	8	8	2	85	\$ 2,550,000
Locavore restaurant	6	8	1	18	\$ 360,000
Hotel	4	8	1	11	\$ 225,000
OBX Farm/Table	2	7	2	6	\$ 180,000
Eco Resort	1	7	1	3	\$ 60,000
Waterpark, etc.	10	6	2	30	\$ 900,000
Vacation Rentals	7	6	2	28	\$ 840,000
Heritage Attraction	4	6	1	8	\$ 160,000
Culinary Training	3	6	1	5	\$ 100,000
Beautify 158	0	6	2	N/A	N/A
			Total	649	\$22,425,000

This Virtual Portfolio construction methodology was employed to calculate the expected economic outcome rates of return for the fifteen community-preferred economic growth tactical elements:

- Family Businesses filling cluster gaps creates 50 employers, 340 jobs, \$13.6M in new income
- Modest Housing construction creates 35 jobs and \$1M in new income
- Vacation Rental Housing construction creates 28 jobs and \$0.8M in new income
- Medical Service growth adds 85 jobs and \$2.5M income
- Locavore restaurants adds 18 jobs and \$0.36M income

Economic Development Opportunity Assessment for Lower Currituck

- Family Entertainment growth adds 30 jobs and \$0.9M income
- Local Retail growth adds 80 jobs and \$2.4M income
- OBX Farm/Table Ag adds 6 jobs and \$.02M income
- Eco Resort(s) adds 80 jobs and \$2.4M income
- Hotel adds 11 jobs and \$0.25M income
- Heritage Attraction adds 8 jobs and \$0.2M income
- Culinary Training adds 5 jobs and \$0.1M income

The qualitative elements of Fast Internet, Vibrant Villages, and Beautify 158 may be assumed to contribute economic outcomes to the overall Virtual Portfolio but were not assessed specific quantitative returns.

Lower Currituck's Targeted and Expected Economic Returns

Construction of this Economic Development Virtual Portfolio enabled an examination of the critical issue as to whether the realization of the community's preferred economic growth outcomes could feasibly satisfy their collective vision of economic success. Presented more colorfully, analyzing the aggregate expected rate of return of the Lower Currituck virtual portfolio would reveal "whether their goals fill their holes".

Analysis of the Lower Currituck Virtual Portfolio finds that, *in the aggregate, the community's fifteen preferred individual tactical elements present a reasonable scenario to achieve the consensus success targets:*

Target: Achieve Lower Currituck OBX tourism cluster business share parity

- Lower Currituck's economy is underrepresented in the number of OBX tourism cluster-related businesses
- As a consequence the region has a less diversified economy with fewer current and future employment and income opportunities
- Lower Currituck might eventually achieve absolute OBX cluster proportionality through the establishment or location of 70 additional, mostly small, businesses in the FIRE, services and retail sectors
- Over the next ten years Lower Currituck could reasonably seek to capitalize on the expansion of the OBX economy to develop and attract 50 such businesses by emphasizing the region's advantages to family businesses seeking livable communities as well as a OBX region base of operations

Target: Achieve 10% Lower Currituck employment growth

- While unemployment in the region is comparatively low, most citizens must commute outside of Lower Currituck for employment
- Increasing intraregional employment by 10% through the attraction and development of 400+ new jobs would provide entry level and upward employment opportunities for existing residents while reducing commuting costs and time
- The aggregate expected employment gain of the fifteen preferred tactical elements in the Virtual Portfolio is 649 jobs over the next 10 years

Target: Achieve Lower Currituck income parity with Currituck County

- Median household income (MHHI) in Lower Currituck is significantly less than the average for the county and has been growing more slowly than the rest of the county
- Lower Currituck's MHHI "Income gap" of \$6,559 requires economic growth yielding an additional \$20 million in annual income in the region
- The aggregate expected income gain of the fifteen preferred tactical elements in the Virtual Portfolio is \$22,425,000

Lower Currituck's Economic Path Forward

This project was undertaken to investigate and answer four key questions to inform economic development policy decisions for Lower Currituck:

- ? Would engagement with Lower Currituck citizens describe a consensus vision of desired future development?
- ? Are the economic growth outcomes preferred by the community reasonable and achievable within the context of the regional OBX economy?
- ? Would the achievement of those outcomes be sufficient to accomplish the community's vision of economic success?
- ? Are current and future land use plans consistent with community goals?

Somewhat unexpectedly the answers to all four questions proved to be "Yes". Despite a variety of perspectives a coherent consensus did emerge from the Community Engagement process. From this consensus emerged qualitative and quantitative metrics defining the parameters of a desired economic future. Numerous specific preferred tactical elements were identified that were validated by market assessments as attainable and that the virtual portfolio analysis found to be sufficient to satisfy the economic vision goals when achieved.

The challenge for County officials is to work with Lower Currituck citizens in crafting and implementing a strategy toward such achievement. Fortunately Lower Currituck is in a comparatively favorable position for such a result due to its advantageous location within the OBX regional economy. Many areas of eastern North Carolina struggle with economic circumstances in which their development and growth options are extremely limited. For them short-term solutions such as incentive-driven industrial recruitment – despite their unlikely chance of success – dominate most economic development thinking.

But Lower Currituck has a different situation. Although individual household circumstances vary, as a whole the area has a long-term challenge as opposed to an immediate one. The Economic Scan revealed that the area is currently growing in population and employment but is lagging its neighbors in median household income growth. The Community Engagement further found that new job creation is less a priority than improving the quality of employment and upward mobility opportunities for existing families. This suggests that Lower Currituck's "economic return" goal is less about short-term development and employment growth and more about longer-term sustainable development leading to improved economic well-being.

Lower Currituck can also benefit from being positioned between two growth centers: Newport News to the north and Dare County to the south. Growth emanating from

Newport News is being absorbed in Upper Currituck where it is presenting challenges and opportunities. Growth emanating from Dare County was first absorbed within Dare County itself, moving up the coast to Currituck's Corolla coastal area where it is reaching capacity. OBX Dare's growth is constrained from expanding to the south and west by federal lands. Future expansion of the OBX tourism-driven economic activity must inevitably look to Lower Currituck locations, initially via the Wright Memorial Bridge and eventually via the Mid-County Bridge.

The types of growth that the marketplace, and to an extent the planning and development policies of Dare County, will direct to Lower Currituck will not all be compatible with the interests of Currituck County and the preferences of the Lower Currituck community. But some of them will be. The growth of the OBX economy also creates opportunity for the attraction and development of other economic activities that are strongly preferred by the area's citizens but for which a Lower Currituck location may be only one of several alternatives.

Market-Driven Strategic Options

Six of the fifteen community preference tactical elements (table 7) were characterized in the Success Matrix as Market-Driven options. That classification recognized that the activity involved was validated by market forces underway in the OBX regional economy. The existence of such forces does not make these activities inevitable opportunities for Lower Currituck but does suggest their occurrence will rely on a regional location that includes the Lower Currituck area, thus making them viable prospects for location attraction.

Family Businesses: The attraction of family-owned businesses would provide OBX tourism cluster-infill, increasing local employment and income through small-scale development by entrepreneurs invested in community values

Modest Housing: The allowance of an increased number of modest homes at or slightly below the median house value would provide a near-term economic boost in employment and income, enhance property values, and enable more current residents to remain

Vacation Rentals: Current area small-scale market demonstrations in vacation rentals will provide critical insights into the viability and benefits of expanding such development

Medical Services: Attracting locations of a spectrum of medical providers serving both the area and the OBX region will reduce travel costs and improve health outcomes for local residents while increasing higher-skill employment opportunities

Locavore restaurant(s): Development of restaurants specializing in cuisine using local foods and ingredients will diversify current dining options, attracting OBX customers desiring culturally-distinctive options

Family Entertainment: Businesses offering multi-generational activities would diversify entertainment options for local residents and attract OBX visitors, enhancing local benefits from tourism industry cluster

For these options the economic development strategic emphasis is on market behavior facilitation rather than active development intervention. The majority of the expected economic returns from the Lower Currituck Virtual Portfolio result from these options, thus making these elements the highest-yielding, lower-cost prospects:

In particular, the growth of the OBX economy enables the attraction and establishment of numerous businesses whose owners might chose Lower Currituck as a home for their families and as a base of operations from which their businesses serve the OBX region. Interviews with Lower Currituck family business leaders found them generally pleased with their location decisions. But they also recommended that improved efficiencies in the county's development processes would facilitate future location decisions, perhaps in combination with a re-branding of Currituck as a "business friendly" OBX location option.

Market-Development Strategic Options

Nine of the fifteen community preference tactical elements (table 7) were characterized in the Success Matrix as Market-Development options. That classification recognized that the activity involved was more speculative in nature. While such activities were found to be validated by market forces in comparable regions, there was not a demonstrated compelling market impetus in the OBX regional economy.

Hotel: Locating a middle-market hotel serving primarily mainland business travelers and event visitors could anchor ancillary retail and commercial development creating fulltime year-round employment

OBX Farm/Table Agriculture: Small-scale specialty farms serving the emerging OBX restaurant market for locally-grown fresh produce would preserve distinctive agrarian landscapes and cultures while increasing employment and income for existing and enhanced occupational skill sets

Ecolodge Resort(s): An ecolodge resort offering accommodation and recreational activities based on the natural heritage assets of the area would utilize market forces to preserve ecological distinctiveness while creating multi-season tourism revenue, employment and income opportunities

Heritage Attraction: Public or private operations offering local cultural and natural heritage educational/entertainment would incentivize preservation and increase OBX market visitors

Culinary/Hospitality Training: Public and private workforce development targeting higher-skill occupations in the OBX tourism industry cluster would increase employment and earnings potential of local current and entry-level employees

Beautify US 158: Improving the aesthetic qualities of the US 158 corridor would enhance appreciation of the area's distinctive natural heritage assets by current and future residents, visitors and businesses

Local Retail: Achieving growth in retail in proportion to population trends would increase entry-level employment and incomes for local youth, enhance local sales tax receipts and reduce the costs of resident purchase travel

Vibrant Villages: Concentrating future residential and commercial development in localized full-service districts preserves distinctive natural and cultural heritage landscapes, strengthens communities and minimizes public service costs.

Fast Internet: Improving high-quality Internet access assures critical infrastructure availability for a full spectrum of citizen needs and enables higher-value economic employment and income activities

The absence of such forces does not make these activities infeasible opportunities for Lower Currituck but does suggest their occurrence will require more proactive economic development intervention to stimulate (rather than accommodate) market behavior. Such intervention typically proves to be more costly with a less-certain likelihood of success. Nonetheless, they can constitute thoughtful investments with highly desired but longer-term economic return potential.

Community Goals and County Land Use Planning

The specific purpose of this study was to engage the citizens of Lower Currituck in order to describe a consensus vision of desired future development and to inform the county's efforts to achieve such outcomes through an identification of market-validated strategies. Fifteen individual tactical goals were weighed across three dimensions—preference; feasibility; and potential impact—to compare their projected collective effect against the overall requirements of bringing Lower Currituck to economic parity with the county. The culmination of this analysis, the Lower Currituck Economic Road Map, charts a community-endorsed route forward that could conservatively deliver local jobs and generate \$22, 425,000 additional income over the next ten years. Progress on the more qualitative goals of faster Internet, vibrant villages and beautification of N.C. 158 would only add to this brighter future.

Lower Currituck does not exist in a planning or resource allocation vacuum so it is important to consider how the opportunities, challenges and goals identified in this study compare with similar planning and futures studies targeting other areas of the county or the county overall. Any concerns about potentially problematic discord, internal or external, have been assuaged: the future that Lower Currituck desires mirrors that emerging in a number of planning studies that were completed in recent years or are currently underway.^{30,31,32,33} Indeed, there is almost total concurrence between the blue sky future envisioned by citizens in Lower Currituck and the vision that frames the 2006 Currituck Land Use Plan, specifically: "...to expand the economic base and improve employment opportunities while preserving the character and natural beauty of the county". Zeroing down to a comparable community level, Moyock's desire to "grow with an emphasis on small-town feel that invites people to build close know relationship in a rural atmosphere" clearly resonates with desires expressed by citizens in Lower Currituck.

Fortunately, getting from today to the future that citizens in Lower Currituck and other areas of the county desire will not require major transformations of existing policies and practices. Results from surveys conducted in association with development of the 2006 Land Use Plan document that the majority of respondents in Currituck overall and more specifically Lower Currituck "Agree" or "Strongly Agree" with planning

³⁰ Moyock Small Area Plan Department of Planning and Community Development Currituck County, North Carolina (April 2014). Accessed at:

<http://co.currituck.nc.us/pdf/latest-news-planning-and-zoning/msap-4-1-14-revised.pdf>

³¹ Imagine Currituck 2040 vision planning exercise in process throughout 2016. Accessed at:

<http://www.co.currituck.nc.us/planning-lup-documentation.cfm?xsrch=geographic%20visioning>

³² Results from Lower Currituck Imagine Currituck meeting, accessed at:

<http://www.co.currituck.nc.us/pdf/planning-lup-documentation/southern-currituck.pdf>

³³ Imagine Currituck Geographic Visioning report, accessed at: <http://co.currituck.nc.us/pdf/planning-lup-documentation/GeographicVisioning.pdf>

objectives that are congruent with the future described in interviews conducted for this study.³⁴ In a planning context suggested actions include:

- Improve the economic well-being of Lower Currituck citizens by achieving proportionate economic activity in the OBX industry cluster through the attraction of 70 locally-based family businesses, targeting the FIRE, retail and services sectors and perhaps one or two large firms. This development focus is consistent with the community's strong consensus preferences, appropriate to available or developable sites and consistent with the Currituck Future Land Use Plan of focused "Community Centers" development.
- Follow Currituck land use planning map in concentrating residential and commercial development in series of village sites separated by preserved natural, green space and agrarian segments. This necessarily requires attention to provision of water, sewer and Internet infrastructure to incent the clustering of residential and commercial development in the following potential vibrant villages:
 - Point Harbor
 - Jarvisburg
 - Grandy
 - Mid-county bridge mainland (future)
- Expand the diversity of housing options by revisiting minimum lot size requirements to allow closer clustering of housing and increasing the availability of multi-tenant construction
- Proactive enforcement and enhancement of existing guidelines and regulations, supporting beautification of N.CN 158, including landscaping
- Proactively working to develop alternative connections between villages, e.g., greenways, bike paths and local connector roads. Model policies and ordinances to guide this option have already been developed for OBX Currituck.³⁵
- Preserve natural and cultural heritage through proactive actions and policies to protect open spaces, water access, farmland and historic landmarks and structures. Land banks are successfully being utilized for this purpose in model best practice coastal communities.

³⁴ "Currituck County Land Use and Development: 2005 Citizen Opinions Survey". Accessed at: <http://www.co.currituck.nc.us/pdf/land-use-plan/ECULandUseSurvey05.pdf>

³⁵ "Connecting Corolla: Bike, Pedestrian, Access Wayfinding Plan" (October 21, 2013) accessed at: <http://co.currituck.nc.us/pdf/latest-news-planning-and-zoning/connecting-corolla-final.pdf>

