Comprehensive Facilities Master Plan

East Carolina University

Eva Klein & Associates
Brailsford & Dunlavey
RMF Engineers
Martin Alexiou Bryson
Protection Engineering Group
ISES
• Work Plan Review
• Strategic Visioning
• Market Analysis
• Demand Based Programming
• Preliminary Conclusions
• Q&A / Next Steps
Work Plan Review

Task 1 – Project Organization
• Work Plan & Stakeholder Identification

Task 2 – Data Collection
• Review of ECU Doc & Data
• Market Analysis
• Preliminary Demand Analysis

Task 3 – Quantitative / Qualitative Analysis
• Detailed Analysis of Findings
• Formation of Recommendations
• Work Plan Review
• Strategic Visioning
• Market Analysis
• Demand Based Programming
• Preliminary Conclusions
• Q&A / Next Steps
Strategic Visioning

Developing Strategy – “Creating The Filter”

Educational Outcomes
Enrollment Management
Campus Community
Financial Performance

How important are these outcomes?
How effective are existing student life facilities and programs?
## Strategic Visioning

### Targeted Outcomes / Gap Analysis

<table>
<thead>
<tr>
<th>Legend:</th>
<th>Targeted Strategic Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Low</td>
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</table>

<table>
<thead>
<tr>
<th>ECU Current Conditions:</th>
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<tbody>
<tr>
<td>ECU Aspirations:</td>
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### I. Educational Outcomes

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<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Supervision Through Maturity</td>
<td>X</td>
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<td></td>
<td></td>
<td></td>
<td>0: Housing provided for competitive reasons only, unit types reflect demand, minimal staffing and programming</td>
</tr>
<tr>
<td>b. Proximity to Educational Resources (Undergraduate)</td>
<td>X</td>
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<td>10: &quot;Live-on&quot; requirement, house significant proportion of students, large proportion of traditional rooms, high degree of staffing and programming</td>
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<td></td>
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<td></td>
<td>0: Housing provided at campus perimeter, no associated academic support facilities</td>
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<td></td>
<td>X</td>
<td></td>
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<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>10: Housing is major part of Master Plan, locations are close to academic core, &quot;residential college&quot; relationships, integrated academic support facilities</td>
</tr>
</tbody>
</table>
Strategic Visioning

Strategic Asset Value Story Components

Quantity & Location of Housing
Target Markets / Unit Types & Program Priorities
Financial Accessibility / Quality Reconciliation
Underwriting Criteria / Institutional Will
Strategic Visioning

ECU Residence Life Mission

Mission:
Campus Living exists to provide quality housing services to ECU students and support their quest for academic and personal success. Campus Living through the practicing of its core values is committed to providing learning, leadership and service opportunities to every student who walks through its doors.

Vision:
Campus Living will provide a memorable college experience for its residents by being a proactive and thoughtful organization that creates an engaging living and learning environment.
Strategic Asset Value Analysis Instructions

• Consider Objectives Independently as University Specific Outcomes

• Remember, We Are Not Predicting Preferences or Behaviors

• Do Not be Encumbered by Current Practices or Conditions

• Do Not be Encumbered by Perceived Affordability

• Adopt a Governing Board’s Global Perspective
• Work Plan Review
• Strategic Visioning
• Market Analysis
• Demand Based Programming
• Preliminary Conclusions
• Q&A / Next Steps
Market Analysis – Focus Groups / Intercept Interviews

• Positives
  – Location is convenient
  – Air conditioning
  – Sinks in the room (traditional halls)
  – Easy to make friends

• Improvements
  – More privacy for both bedroom & bathroom
  – Increased storage space
  – Less restrictive policies
Market Analysis – Off Campus

- **Average Rent per month by unit type**
  - Efficiency = $573
  - 1 bedroom = $452
  - 2 bedroom = $674 ($337)
  - 3 bedroom = $1,098 ($366)
  - 4 bedroom = $1,560 ($390)

- **Average Fees per person**
  - Application fee = $35
  - Security Deposit = $300
  - Utilities = $100 / month / person

**Amenities**

- **All or Most properties**
  - A/C
  - Patio / balcony
  - Dishwasher
  - Washer / Dryers in unit

- **Select / Luxury properties**
  - Pool
  - Tanning
  - Tennis
  - Volleyball
  - Fitness centers / Gyms
  - Clubhouse / Game room
  - Furnished
  - Individual leases
Market Analysis – Competitive Context

Room & Board Analysis

- Northern Illinois University: $4,954
- University of North Dakota - Main: $6,583
- Old Dominion University - Virginia: $7,092
- University of South Carolina - Columbia: $7,318
- East Carolina University: $7,500
- Texas Tech University: $7,527
- Western Michigan University: $7,592
- Virginia Commonwealth University: $8,335
- Ohio University - Main Campus: $8,946
Market Analysis – Competitive Context

Undergraduate Cost Analysis

(includes in-state tuition, room & board)
Market Analysis – Student Survey

Q8. Which statements describe your on-campus housing experience?

- 88% said it was a convenient living option.
- 79% said it introduced them to new friends.
- 76% said it helped them acclimate to life at ECU.
- 64% said it provided them with a safe, secure environment.
- 59% said it provided them with a sense of community.
- 57% said it enhanced their overall experience at ECU.
- 49% said it helped them learn about people different from them.
- 43% said it had a positive influence on their academic performance.
- 22% said it provided them with leadership opportunities.
- 6% said they did not enjoy/did not value their residence halls experience.
**Market Analysis – Student Survey**

**Q55. Why do you or why would you plan to live off campus?**

- To have more privacy: 75%
- To have a kitchen: 71%
- To have a living room space: 68%
- To have more freedom/independence: 67%
- To prepare my own meals: 67%
- To have a washer/dryer in my unit: 61%
- Lower cost: 48%
- To live with friends: 45%
- More available parking: 45%
- Better study atmosphere/less noise: 43%
- On-campus housing policies: 34%
- Better location: 28%
- Physical condition of ECU residence halls: 24%
- Closer to my work: 19%
- Faster Internet access: 17%
- To establish North Carolina state residency: 6%
- Better accessibility for those with physical disabilities: 2%
• Work Plan Review
• Strategic Visioning
• Market Analysis
• Demand Based Programming
• Preliminary Conclusions
• Q&A / Next Steps
Units Tested

A - Trad. Double

B - Trad. Single

C - 8 person Suite Double

D - 4 person Suite Double

E - 2 person Suite Single

F - 2 person Apt. Single

E - 4 person Apt. Single
**Capture Rates – All Students**

**Target Market**
- Full time students
- Single with no children
- Non-homeowners
- Pay at least $400 / month if off campus

<table>
<thead>
<tr>
<th>Class</th>
<th>Current Capture Rate</th>
<th>Potential Capture Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freshman Year</td>
<td>95.4%</td>
<td>63.2%</td>
</tr>
<tr>
<td>Sophomore Year</td>
<td>19.2%</td>
<td>46.9%</td>
</tr>
<tr>
<td>Junior Year</td>
<td>7.0%</td>
<td>30.7%</td>
</tr>
<tr>
<td>Senior Year</td>
<td>3.0%</td>
<td>21.7%</td>
</tr>
<tr>
<td>Graduate/Professional Year(s)</td>
<td>0.3%</td>
<td>10.0%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>22.2%</strong></td>
<td><strong>32.1%</strong></td>
</tr>
</tbody>
</table>
## Maximum Potential Demand – All Students

<table>
<thead>
<tr>
<th>Year</th>
<th>Enrolled Population</th>
<th>Potential Capture Rate</th>
<th>Maximum Potential Demand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freshman Year</td>
<td>4,409</td>
<td>63.2%</td>
<td>2,788</td>
</tr>
<tr>
<td>Sophomore Year</td>
<td>4,116</td>
<td>46.9%</td>
<td>1,931</td>
</tr>
<tr>
<td>Junior Year</td>
<td>4,420</td>
<td>30.7%</td>
<td>1,359</td>
</tr>
<tr>
<td>Senior Year</td>
<td>5,810</td>
<td>21.7%</td>
<td>1,258</td>
</tr>
<tr>
<td>Graduate/Professional Year(s)</td>
<td>5,987</td>
<td>10.0%</td>
<td>599</td>
</tr>
<tr>
<td><strong>Total Demand (# beds)</strong></td>
<td><strong>24,742</strong></td>
<td><strong>32.1%</strong></td>
<td><strong>7,936</strong></td>
</tr>
</tbody>
</table>

**Existing On Campus Beds**
- **5,497**

**Surplus/(Deficit)**
- **(2,439)**
**Comprehensive Facilities Master Plan 2008-2009**

**Unit A - Traditional Residence Hall**
- Double: 197
- Single: 152

**Unit B - Traditional Residence Hall**
- Double: 127
- Single: 141

**Unit C - 8-person Suite**
- Double: 137
- Single: 832

**Unit D - 4-person Suite**
- Double: 505
- Single: 444

**Unit E - 2-person Semi-Suite**
- Single: 520

**Unit F - 2-person Apartment**
- Single: 520

**Unit G - 4-bedroom Apartment**
- Single: 520

### On-Campus Housing Type: Distribution of Demand

<table>
<thead>
<tr>
<th>Year</th>
<th>Double</th>
<th>Single</th>
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<td>1,931</td>
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</tr>
<tr>
<td>Junior Year</td>
<td>47</td>
<td>83</td>
<td>41</td>
<td>229</td>
<td>379</td>
<td>313</td>
<td>266</td>
<td>1,359</td>
<td></td>
</tr>
<tr>
<td>Senior Year</td>
<td>0</td>
<td>210</td>
<td>81</td>
<td>262</td>
<td>213</td>
<td>262</td>
<td>231</td>
<td>1,258</td>
<td></td>
</tr>
<tr>
<td>Graduate/Professional</td>
<td>28</td>
<td>83</td>
<td>0</td>
<td>28</td>
<td>132</td>
<td>220</td>
<td>110</td>
<td>599</td>
<td></td>
</tr>
<tr>
<td>Total Demand (# beds)</td>
<td>398</td>
<td>668</td>
<td>380</td>
<td>1,780</td>
<td>1,505</td>
<td>1,644</td>
<td>1,560</td>
<td>7,936</td>
<td></td>
</tr>
</tbody>
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### Existing On Campus Beds

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<th></th>
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<th>Single</th>
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<tbody>
<tr>
<td>Freshman Year</td>
<td>4,513</td>
<td>0</td>
</tr>
<tr>
<td>Sophomore Year</td>
<td>494</td>
<td>0</td>
</tr>
<tr>
<td>Junior Year</td>
<td>490</td>
<td>0</td>
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<tr>
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<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total Surplus/(Deficit)</td>
<td>(668)</td>
<td>(1,290)</td>
</tr>
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</table>

Surplus of ~3,500 community-style beds:
- De-densification (to single occupancy)
- Conversion (to suite-style units)
- Comprehensive bathroom renovations
- Taking buildings off line

Strong demand for suites and apartments
## Comprehensive Facilities Master Plan

### Unit A - Traditional Residence Hall
- Double: 197
- Single: 152

### Unit B - Traditional Residence Hall
- Single: 137
- Double: 832
- Single: 505

### Unit C - 8-person Suite
- Single: 444

### Unit D - 4-person Suite
- Single: 520

### Unit E - 2-person Semi-Suite
- Single: 2,788

### Unit F - 2-person Apartment
- Single: 1,931

### Unit G - 4-bedroom Apartment
- Single: 1,258

### On-Campus Housing Type: Distribution of Demand

<table>
<thead>
<tr>
<th>Year</th>
<th>Freshman</th>
<th>Sophomore</th>
<th>Junior</th>
<th>Senior</th>
<th>Graduate/Professional</th>
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</tbody>
</table>

### Existing On Campus Beds
- 4,513
- 494
- 490
- 0
- 0
- 0
- **5,497**

### Surplus/(Deficit)
- 4,115
- (668)
- 114
- (1,290)
- (1,505)
- (1,644)
- **(2,439)**

### Over 4,000 freshmen beds needed (95% of enrollment)

1. Significant % of freshmen will remain in community-style despite low demand
2. Additional new construction of suite-style housing will be needed
3. Will freshmen be allowed in apartment-style units?
### On-Campus Housing Type: Distribution of Demand

<table>
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<th>Unit F - 2-person Apartment Single</th>
<th>Unit G - 4-bedroom Apartment Single</th>
<th>Total</th>
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Strategic decision needed on how to address sophomore demand (capacity and unit types)
### Comprehensive Facilities Master Plan

**2008-2009**

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</table>

**Strategic decision needed on how to address apartment demand (capacity, unit types, and transaction structure)**
Concept Phasing Strategies

West Campus Neighborhood
• Build 4 person suites (similar to College Hill)
• Build Apartments (2 or 4 bedroom)
• Renovate existing traditional halls as needed

Central Campus Neighborhood
• Renovate Halls as needed, but retain traditional configuration

College Hill Neighborhood
• Continue current renovations to Scott
• Investigate further conversion of traditional to 8 person suites
  – Tyler
  – Jones
  – Aycock
• Build College Hill Suites II
• Build Apartments (2 or 4 bedroom)
• Work Plan Review
• Strategic Visioning
• Market Analysis
• Demand Based Programming
• Preliminary Conclusions
• Q&A / Next Steps
Preliminary Conclusions

• Key policy decisions are needed to determine most appropriate implementation strategy
  – Desired mix of on-campus residents by class
  – Live-in requirement implementation
  – Enrollment growth / Carnegie classification requirements

• Increased supply of suites and apartments is needed
  – Survey demand
  – Compete with off-campus market
  – Retain on-campus upperclassmen
• Work Plan Review
• Strategic Visioning
• Market Analysis
• Demand Based Programming
• Preliminary Conclusions
• Q&A / Next Steps
Task 3

- Financial Modeling
- Scenario Testing
- Delivery of Report