



East Carolina University

Comprehensive Facilities Master Plan

SMITHGROUP | JJR

Eva Klein & Associates

Brailsford & Dunlavey

RMF Engineers

Martin Alexiou Bryson

Protection Engineering Group

ISES

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Housing Update

East Carolina University \ Comprehensve Facilities Master Plan



- 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

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Strategic Visioning

Developing Strategy – “Creating The Filter”

Educational Outcomes

How important are these outcomes?

Enrollment Management

Campus Community

Financial Performance

How effective are existing student life facilities and programs?

Strategic Visioning

Targeted Outcomes / Gap Analysis

Legend:	Targeted Strategic Value												
	Low					High							
	0	1	2	3	4	5	6	7	8	9	10		
ECU Current Conditions:					X								
ECU Aspirations:							O						
I. Educational Outcomes	0	1	2	3	4	5	6	7	8	9	10	Notes	
a. Supervision Through Maturity								X					0: Housing provided for competitive reasons only, unit types reflect demand, minimal staffing and programming 10: "Live-on" requirement, house significant proportion of students, large proportion of traditional rooms, high degree of staffing and programming
b. Proximity to Educational Resources (Undergraduate)								X					0: Housing provided at campus perimeter, no associated academic support facilities 10: Housing is major part of Master Plan, locations are close to academic core, "residential college" relationships, integrated academic support facilities

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

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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

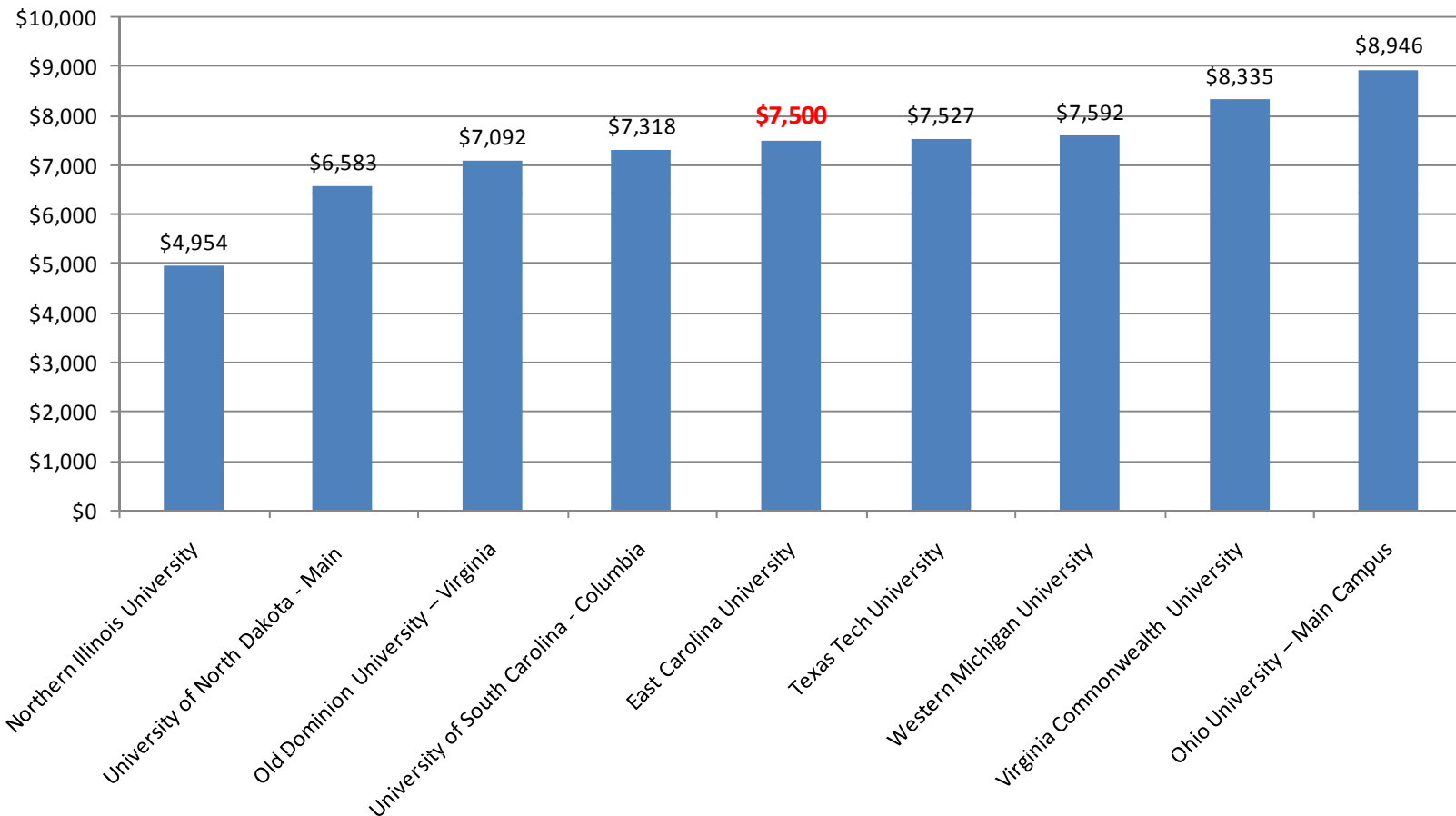
Amenities

- 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



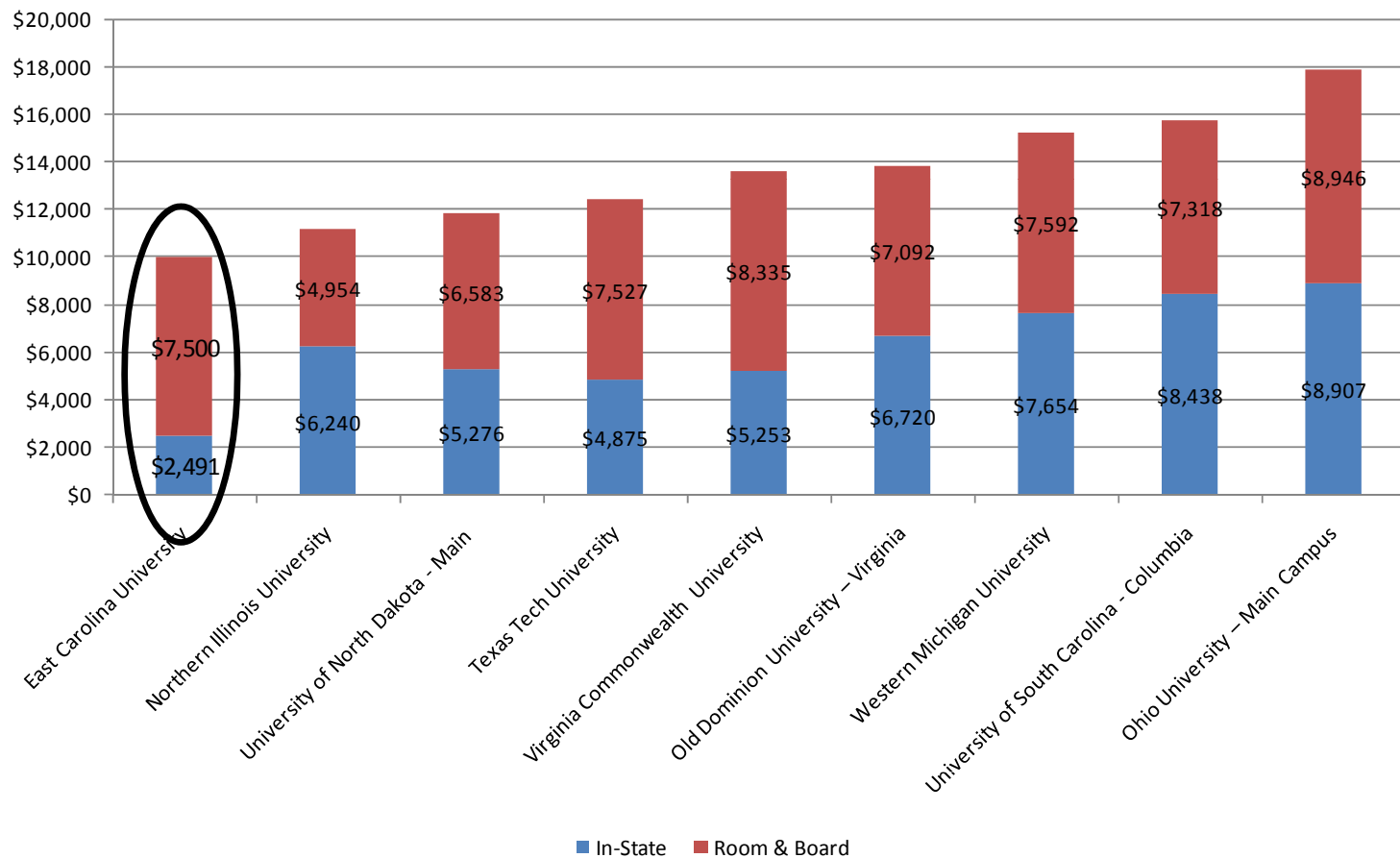
Market Analysis – Competitive Context

Room & Board Analysis



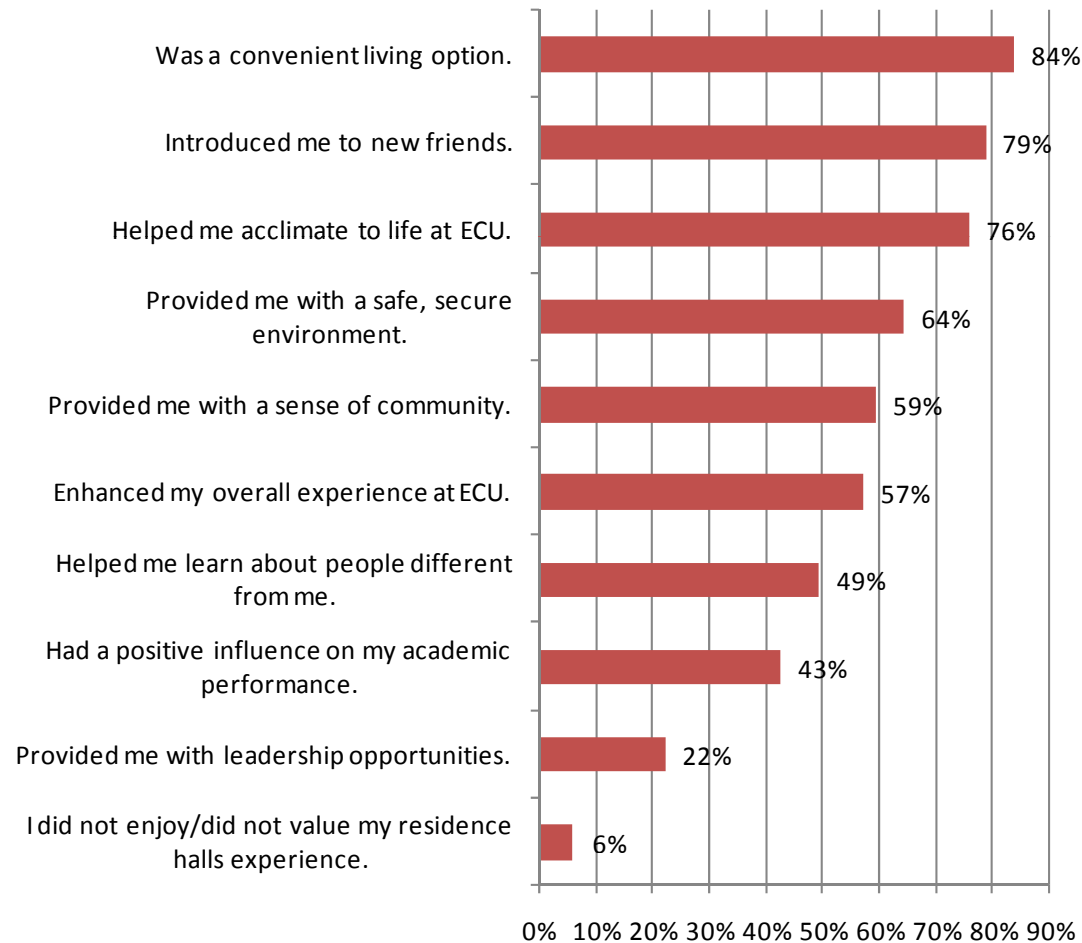
Market Analysis – Competitive Context

Undergraduate Cost Analysis
(includes in-state tuition, room & board)



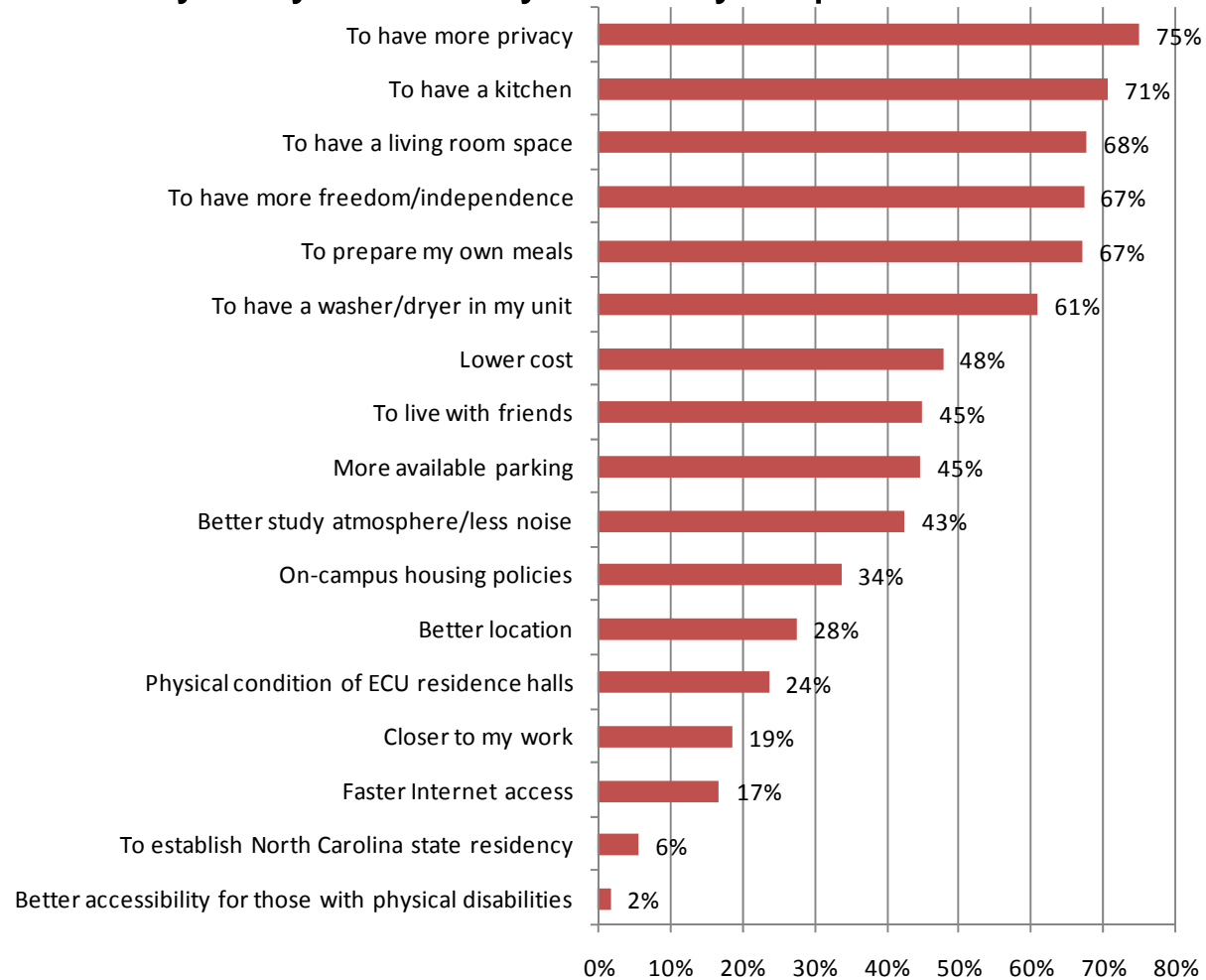
Market Analysis – Student Survey

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



Market Analysis – Student Survey

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

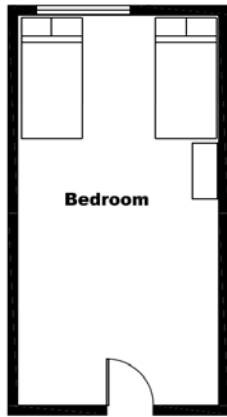


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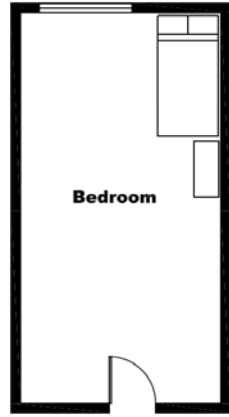


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Units Tested



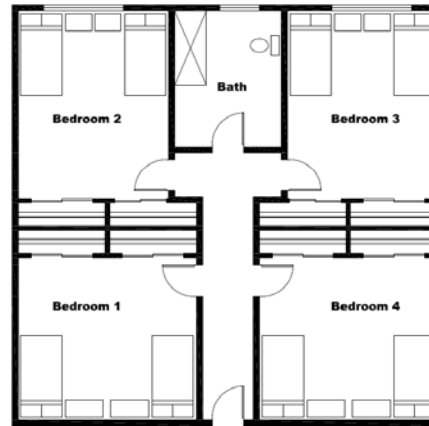
A – Trad. Double



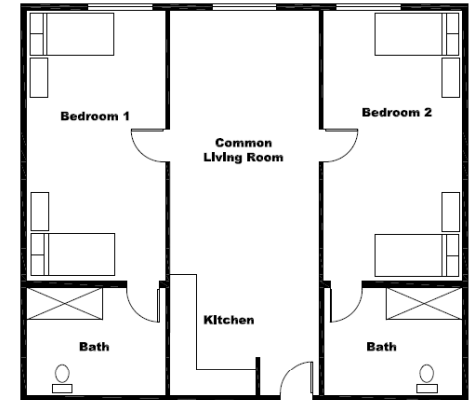
B – Trad. Single



E – 2 person Suite Single



C – 8 person Suite Double



D – 4 person Suite Double



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

Current Versus Potential Capture Rates

Class	Current Capture Rate	Potential Capture Rate
Freshman Year	95.4%	63.2%
Sophomore Year	19.2%	46.9%
Junior Year	7.0%	30.7%
Senior Year	3.0%	21.7%
Graduate/Professional Year(s)	0.3%	10.0%
Total	22.2%	32.1%

Maximum Potential Demand – All Students

	Enrolled Population	Potential Capture Rate	Maximum Potential Demand
Freshman Year	4,409	63.2%	2,788
Sophomore Year	4,116	46.9%	1,931
Junior Year	4,420	30.7%	1,359
Senior Year	5,810	21.7%	1,258
Graduate/Professional Year(s)	5,987	10.0%	599
Total Demand (# beds)	24,742	32.1%	7,936
Existing On Campus Beds			5,497
Surplus/(Deficit)			(2,439)

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2008-2009 On-Campus Housing Type: Distribution of Demand								
	Unit A - Traditional Residence Hall Double	Unit B - Traditional Residence Hall Single	Unit C - 8- person Suite Double	Unit D - 4- Double Suite Single	Unit E - 2- person Semi- Suite Single	Unit F - 2- person Apartment Single	Unit G - 4- bedroom Apartment Single	Total
Freshman Year	197	152	137	832	505	444	520	2,788
Sophomore Year	127	141	121	429	276	405	433	1,931
Junior Year	47	83	41	229	379	313	266	1,359
Senior Year	0	210	81	262	213	262	231	1,258
Graduate/Professional Year(s)	28	83	0	28	132	220	110	599
Total Demand (# beds)	398	668	380	1,780	1,505	1,644	1,560	7,936
Existing On Campus Beds	4,513	0	494	490	0	0	0	5,497
Surplus/(Deficit)	4,115	(668)	114	(1,290)	(1,505)	(1,644)	(1,560)	(2,439)

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

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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?

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Strategic decision needed on how to address sophomore demand (capacity and unit types)

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2008-2009

On-Campus Housing Type: Distribution of Demand

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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)

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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

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Task 3

- Financial Modeling
- Scenario Testing
- Delivery of Report