



BUILDING COMMUNITY THROUGH STUDENT HOUSING

TACUHO PRESENTATION | OCTOBER 7, 2013



INTENDED LEARNING OBJECTIVES

- Highlight the master planning process
- Detail the link between strategic needs and housing unit types
- Provide an overview of the progressive housing approach
- Discuss lessons learned for relevant case studies

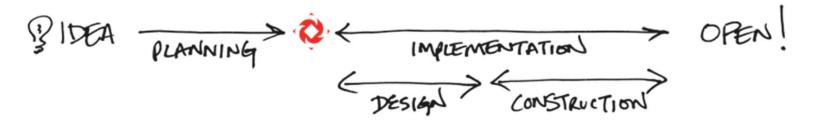






FIRM INTRODUCTION

BRAILSFORD & DUNLAVEY



Experience

375 + Higher Education Clients, including over 300
 Student Housing Projects

Staff

Diverse Skill Set and Backgrounds

Services

 Planning Through Implementation; 85% of Our Plans Have Been Implemented

FIRM INTRODUCTION

ALABAMA Aubum University Tray University University of Alabama, Tuscaloosa University of South Alabama University of South Alabama

ARKANSAS University of Arkansas

ARIZONA Arizona State University Chandler-Gilbert Community College University of Arizona

FLORIDA Florida State University University of Florida University of West Florida

GEORGIA Abraham Baldwin Agricultural College Agnes Scott College Albany State University Armstrong Atlantic State University

Altanta Callege of Air Altanta Martopolitan Callege Augusta State University Augusta Technical Institute Balakini State Callege Berry College Berrou University Clark Allanta University College of Constal Georgia

Columbia Theological Seminary Covenant College Dalton State College Darton College East Georgia College Emory University

Floyd College Fort Valley State University Georgia College & State University Georgia Gwinnett College Georgia Institute of Technology

Georgia Perimeter College Georgia Regents University Georgia Southern University Georgia Southwestern State University

Gardon State College Griffin Technical College Kennesaw State University Mercer University

Georgia State University

Middle Georgia State College Morehouse School of Medicine Ogletharpe University

Reinhardt College Savannah College of Art & Design Savannah State University South Georgia State College

Southern Crescent Technical College Southern Polytechnic State University Spelman College State University of West Georgia

Tift College University of Georgia University of North Georgia University of West Georgia U.S. Army Signal School Valdosta State University Wesleyan College Young Harris College LaGrange College

ILLINOIS University of Illinois, Urbana-Champaign

KENTUCKY
Bluegrass Community & Technical College
Eontern Kentucky University
Gateway Community and Technical College
Western Kentucky University
Transylvania University
University of Kentucky
University of Kentucky

University of Louisville MARYLAND Washington Callege

MASSACHUSETTS Harvard University

MCHIGAN
Central Michigan University
Eantern Michigan University
Lanning Community College
Many grow College
Many grow College
Many grow College
Many grow College
University
R. Claire Community College
University of Michigan
University

NORTH CARCLINA
Advaille-Buncombe Technical College
Bevard College
Everat College
Central Carolina Community College
Duke University
East Carolina University
Lenoir-Rhyne University
Meredith College
North Carolina ART State University
North Carolina Carolina Chira
North Carolina State University
North Carolina State University
North Carolina State University
Salem College
UNC, Chapat Hill
UNC, Pembrocke

NEW YORK Cornell University St. Bonaventure University SUNY Stany Brook

UNC, Wilmington

Wake Forest University

Warren Wilson College

OHIO University of Akron University of Cincinnati

OREGON University of Oregon PENNSYLVANIA Albright College Bryn Mawr College Millersville University Ursinus College

SOUTH CAROLINA
Charleston Southern University
Claffin College
Clemson University
College of Charleston
Medical University of South Carolina
Presbyterian College

TENNESSEE
Lipscomb University
The University of the South
University of Tennessee, Chattanooga
University of Tennessee, Knavville
Vanderbilt University

Baylor College of Medicine Houston Community College Rice University Texas Southern University Texas State University University of Houston University of Texas at Austin

UTAH University of Utah

VIRGINIA Christopher Newport University Virginia Commonwealth University Virginia Polytechnic Institute and State University

WEST VIRGINIA West Virginia University

INTERNATIONAL Elim Vocational High School, St. Elizabeth's Parish, Jamaica (USAID)

Abuja National Mosque School Housing, Abuja, Nigeria (Federal Gov't of Nigeria) F. Portal School Housing, Ft. Portal, Uganda (Medical Mission Sisters) LORD · AECK · SARGENT

ARCHITECTURE

5 offices, 139 campuses, 21 states





LAS has certified 27 buildings on campuses, including 1 LEED® Platinum and 14 LEED® Gold facilities.



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TACUHO 2013



FINANCIAL & POLITICAL REALITIES

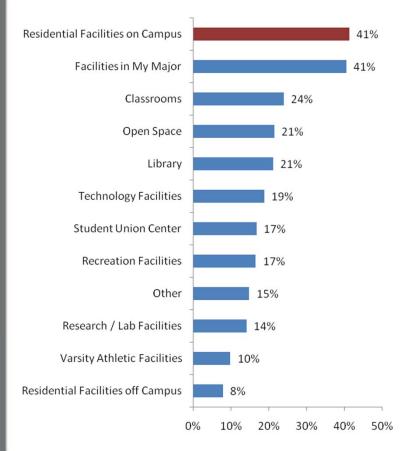
STANDARD & POOR (2012)

- 'Relatively stable' outlook for the industry due to strong demand but challenges related to reduced state funding and prolonged economic recovery
- State appropriations for public colleges and universities to remain flat or down; changing model from "per-student" based to "completion" based; and of stimulus funds in FY 2012
- Competition for students is increasing; increased pressure to enroll outof-state and international students
- Student affordability an issue need for increased financial aid resulting in net tuition revenue discounts; steadily increasing student debt burden
- Slowdown in debt issuance between 2009 and 2011; investors are seeking more reserve funds, bond covenants and pledged security (w/more liens on operating revenues)

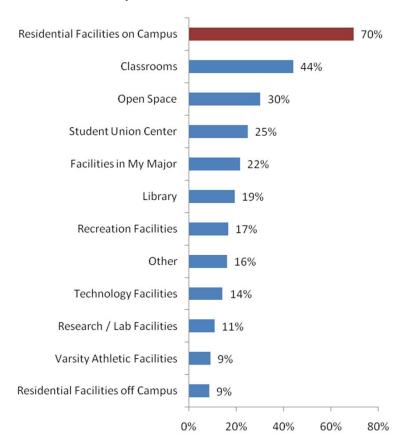


HOUSING AS RECRUITMENT TOOL

Inadequate Facilities at Rejected Institutions



Poorly Maintained Facilities at Rejected Institutions



Source: The impact on facilities on recruitment and retention of students – Reynolds, et al

AVAILABILITY OF FUNDING MODELS

TRANSACTION MODEL CHARACTERISTICS

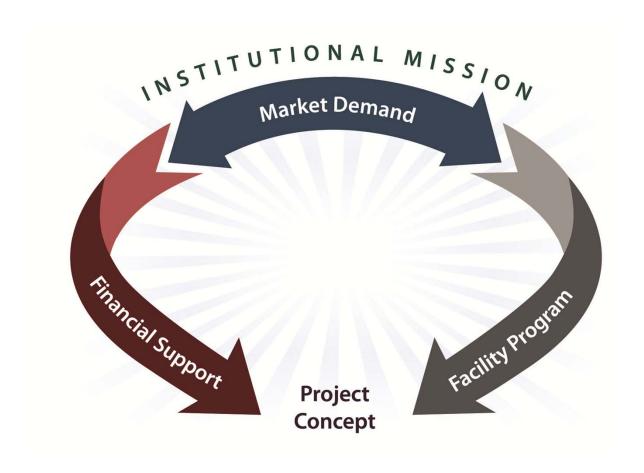
| Metric | Institutional Development | Affiliated Foundation | Unaffiliated Non-Profit | Fully Privatized |
|------------------------|----------------------------|--------------------------|-------------------------|---------------------|
| Cost of Capital | Lowest | Higher | Higher | Highest |
| Tax-Exempt Debt | Available | Potentially | Potentially | N/A |
| Off-Balance Sheet | N/A | Probably N/A | Probably | Yes |
| College Control | Highest | High to Low | High to Low | Lowest |
| Financial Return | Highest | High | Moderate | Lowest |
| Ease of Implementation | Lowest | Moderate | Moderate | Highest |





ACHIEVING STRATEGIC OUTCOMES

WHY WE PLAN







DETERMINING STRATEGIC DIRECTION

BUILDING COMMUNITY THROUGH STUDENT HOUSING

HOUSING MASTER PLAN ASSESMENT

- Strategic Visioning
- Concept Development Focus Groups
- Survey Implementation and Analysis
- Off-Campus Market Analysis
- Peer Institution Analysis
- Existing
- Concept / Development Options
- Capital and Operating Financial Assessment
- Final Report and Presentation







IDENTIFY STRATEGIC DRIVERS

STRATEGIC ASSET VALUE ANALYSIS

Existing Conditions - X

Analyzing gaps in four major outcome

categories

Educational

- Enrollment Management
- Campus Community
- Financial Performance

DESIRED STRATEGIC OUTCOMES DRIVE PHYSICAL SOLUTIONS

| | Tar | gete | ed A | spii | ratio | n - | 0 | | | |
|---------------------------------------|-----|------|------|------|-------|-----|---|---|---|----|
| Strategic Objectives | | | | | | | | | | |
| I. Enhance Educational Outcomes | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| a. Supervision through Maturity | | | | | | X | | | 0 | |
| e. Development Continuum | | | | | X | | | | 0 | |
| b. Proximity to Educational Resources | | | | | | | X | | 0 | |
| d. Direct Curriculum Enhancement | | | X | | | | | | 0 | |
| II. Enrollment Management | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| a. Housing Market Supplement | | | | | X | | | 0 | | |
| b. Competitive Amenity | | | | | X | | | | 0 | |

RECONCILING SUPPLY AND DEMAND

BUILDING COMMUNITY THROUGH STUDENT HOUSING

| Population | Enrolled Population | Potential Capture Rate | Maximum Potential Demand | | | | |
|------------|---------------------|------------------------------|--------------------------------|--|--|--|--|
| Juniors | 3,025 | 41.6% | 1,257 | | | | |
| Seniors | 6,376 | 24.1% | 1,537 | | | | |

2,794 Maximum Junior/Senior demand

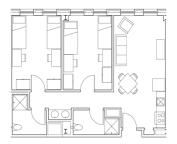
Juniors/Seniors in residence halls -480

-210 Juniors/Seniors in apartments

Excess Junior/Senior demand

| | 4BR Apartment Single | Studio/Efficiency Single | 2BR Apartment Double |
|-----------------------------|-------------------------|--------------------------|----------------------|
| Freshmen | 210 | 118 | 420 |
| Sophomores | 186 | 212 | 469 |
| Juniors | 266 | 217 | 227 |
| Seniors | 374 | 350 | 350 |
| Graduates | 89 | 119 | 75 |
| | | | |
| Total Current Demand | 1,125 | 1,016 | 1,541 |
| Design Capacity | 295 | 0 | 92 |
| Surplus/ (Deficit) | (830) | (1,016) | (1,449) |







Demand primarily for 4BR apartments, studios, and 2BR (double) apartments.

EVALUATING EXISTING FACILITIES

| Residence Hall | Strategic Importance | Alignment with Student Demand | Physical Condition | Financial Performance |
|---------------------|-------------------------|-------------------------------|--------------------|--------------------------|
| College Hill Suites | Strong | Strong | Strong | Weak |
| Scott (offline) | Strong | Strong | Strong | Weak |
| Cotton | Strong | Neutral | Strong | Weak |
| Jarvis | Strong | Neutral | Strong | Weak |
| Fleming | Strong | Neutral | Neutral | Neutral |
| Greene | Neutral | Neutral | Neutral | Strong |
| Clement | Neutral | Neutral | Neutral | Strong |
| White | Neutral | Neutral | Neutral | Strong |
| Fletcher | Neutral | Neutral | Neutral | Neutral |
| Umstead | Neutral | Neutral | Neutral | Weak |
| Jones | Neutral | Neutral | Neutral | Weak |
| Belk | Weak | Neutral | Weak | Strong |
| Garrett | Neutral | Neutral | Weak | Neutral |
| Aycock | Weak | Neutral | Weak | Neutral |
| Tyler | Weak | Neutral | Weak | Neutral |





MASTER PLANNING OUTCOMES

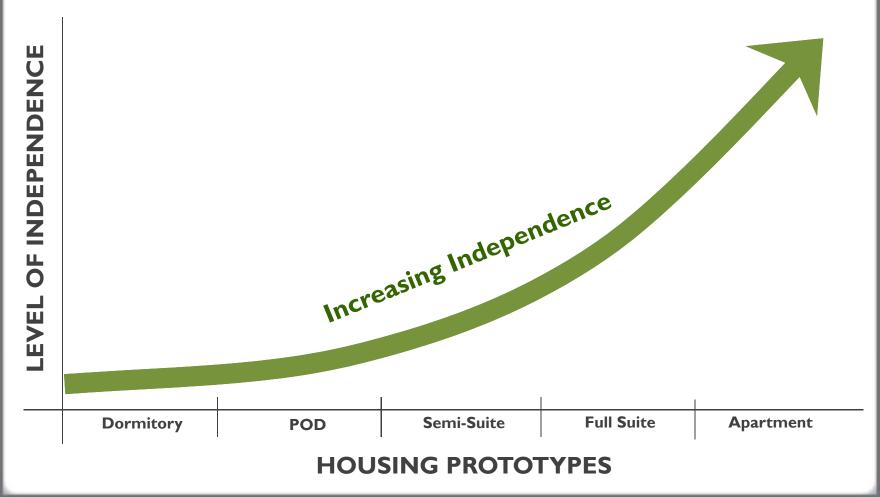
BUILDING COMMUNITY THROUGH STUDENT HOUSING

The goal of the completed Master Plan is to...

- Demonstrate is relevance to furthering the school's mission and strategic objectives
- Reinforce campus values and ideals
- Respond to institutional commitments and responsibilities
- Improve the school's competitive position in the market."



ALIGINING UNIT TYPES WITH DESIRED STUDENT EXPERIENCE





THE SOCIALIZATION INDEX

BUILDING COMMUNITY THROUGH STUDENT HOUSING

| Unit Type | BR | BA | LR | K | В | Ind. | Social | Typical Use |
|---------------------------------------|----|----|----|-----|----|------|--------|----------------------------|
| Double Occupancy Dormitory | 1 | 0 | 0 | 0.0 | 2 | 0.50 | 1.50 | First-Year Students |
| Pod Units (15BR/8BA) | 15 | 8 | 1 | 1.0 | 30 | 0.60 | 1.40 | First-Year Students |
| Double-Occupancy Semi Suite (2BR/1BA) | 2 | 1 | 0 | 0.0 | 4 | 0.75 | 1.33 | First-Year Students |
| Double-Occupancy Semi Suite (2BR/2BA) | 2 | 2 | 0 | 0.0 | 4 | 1.00 | 1.00 | First-Year Students |
| Double-Occupancy Semi Suite (1BR/1BA) | 1 | 1 | 0 | 0.0 | 2 | 1.00 | 1.00 | First-Year Students |
| Double-Occupancy Suite (2BR/2BA) | 2 | 2 | 1 | 0.5 | 4 | 1.38 | 0.73 | Underclass Students |
| Single-Occupancy Semi-Suite (2BR/1BA) | 2 | 1 | 0 | 0.0 | 2 | 1.50 | 0.67 | Underclass Students |
| Single-Occupancy Hybrid (2BR/1BA) | 2 | 1 | 0 | 0.5 | 2 | 1.75 | 0.57 | Underclass Students |
| Single-Occupancy Semi-Suite (4BR/2BA) | 4 | 2 | 1 | 0.5 | 4 | 1.88 | 0.53 | Underclass Students |
| Private Semi-Suite (1BR/1BA) | 1 | 1 | 0 | 0.0 | 1 | 2.00 | 0.50 | Resident Advisor |
| Single Occupancy Suite (2BR/2BA) | 2 | 1 | 1 | 0.5 | 2 | 2.25 | 0.44 | Upperclass Students |
| Private Suite (1BR/1BA) | 1 | 1 | 0 | 0.5 | 1 | 2.50 | 0.40 | Resident Advisor |
| 4-Bedroom Apartment (4BR/2BA) | 4 | 2 | 1 | 1.0 | 4 | 2.00 | 0.50 | Upperclass Students |
| 2-Bedroom Apartment (2BR/1BA) | 2 | 1 | 1 | 1.0 | 2 | 2.50 | 0.40 | Upperclass Students |
| 2-Bedroom Apartment (2BR/2BA) | 2 | 2 | 1 | 1.0 | 2 | 3.00 | 0.33 | Resident Manager |
| 1-Bedroom Apartment (1BR/1BA) | 1 | 1 | 1 | 1.0 | 1 | 4.00 | 0.25 | Graduate Student |

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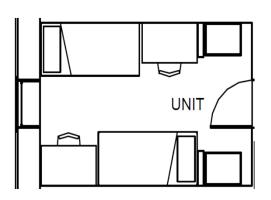
THE INDEPENDENCE INDEX

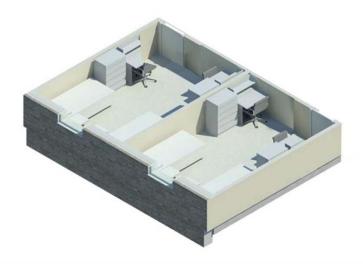
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| Double-Occupancy Semi Suite (1BR/1BA) | 1 | 1 | 0 | 0.0 | 2 | 1.00 | 1.00 | First-Year Students |
| Double-Occupancy Suite (2BR/2BA) | 2 | 2 | 1 | 0.5 | 4 | 1.38 | 0.73 | Underclass Students |
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| Single-Occupancy Hybrid (2BR/1BA) | 2 | 1 | 0 | 0.5 | 2 | 1.75 | 0.57 | Underclass Students |
| Single-Occupancy Semi-Suite (4BR/2BA) | 4 | 2 | 1 | 0.5 | 4 | 1.88 | 0.53 | Underclass Students |
| Private Semi-Suite (1BR/1BA) | 1 | 1 | 0 | 0.0 | 1 | 2.00 | 0.50 | Resident Advisor |
| Single Occupancy Suite (2BR/2BA) | 2 | 1 | 1 | 0.5 | 2 | 2.25 | 0.44 | Upperclass Students |
| Private Suite (1BR/1BA) | 1 | 1 | 0 | 0.5 | 1 | 2.50 | 0.40 | Resident Advisor |
| 4-Bedroom Apartment (4BR/2BA) | 4 | 2 | 1 | 1.0 | 4 | 2.00 | 0.50 | Upperclass Students |
| 2-Bedroom Apartment (2BR/1BA) | 2 | 1 | 1 | 1.0 | 2 | 2.50 | 0.40 | Upperclass Students |
| 2-Bedroom Apartment (2BR/2BA) | 2 | 2 | 1 | 1.0 | 2 | 3.00 | 0.33 | Resident Manager |
| 1-Bedroom Apartment (1BR/1BA) | 1 | 1 | 1 | 1.0 | 1 | 4.00 | 0.25 | Graduate Student |
| | | | | | | | | |





PROTOTYPES - DORMITORY







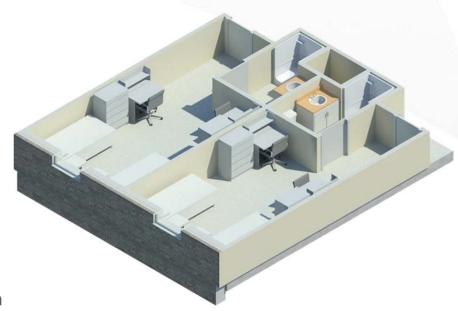
- I to 2 beds
- Single room unit
- Amenities part of public space
- Restroom shared
- Luxury index: 1.50
- Socialization index: .50
- 200 sf/bed

PROTOTYPES - SEMI-SUITE 1

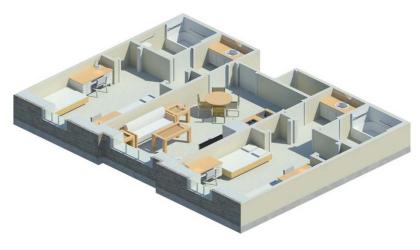




- Shared bedroom promotes socialization
- Unit efficiency allows for more common space
- Bathroom shared by two students
- Luxury Index: 1.0
- Socialization Index: 1.0
- 135 sf/bed



PROTOTYPES - SUITE



- Two-bedrooms, double-occupancy
- Shared bedroom
- Living room can compete with public commons
- Kitchenette varies with dining program
- Luxury Index: 1.38
- Socialization Index: 0.73
- ◆ 185 sf/bed



PROTOTYPES - HYBRID SUITE





- Two-bedrooms and private bedrooms
- Includes kitchen or kitchenette
- Still allows for generous common areas
- Good for returning students
- Luxury Index: 1.75
- Socialization Index: 0.57
- 236 sf/bed



PROTOTYPES - APARTMENT





- 2 to 4 bedrooms
- Emphasis on independence
- Market-driven amenities
- Roommate policy is critical
- Luxury index: 2.00
- Socialization index: 0.50
- 265 sf/bed





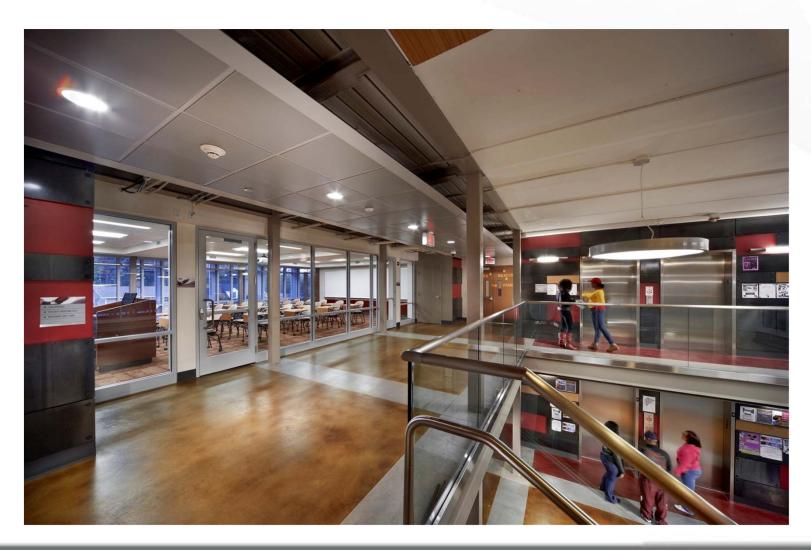
PROTOTYPES - PODS



- Single room, double occupancy
- Traditional "dorm-style" rooms
- Generous community spaces (25-30 students)
- Spa-style community bathrooms
- Luxury Index: .6
- Socialization Index: 1.4
- ◆ 200 sf/bed



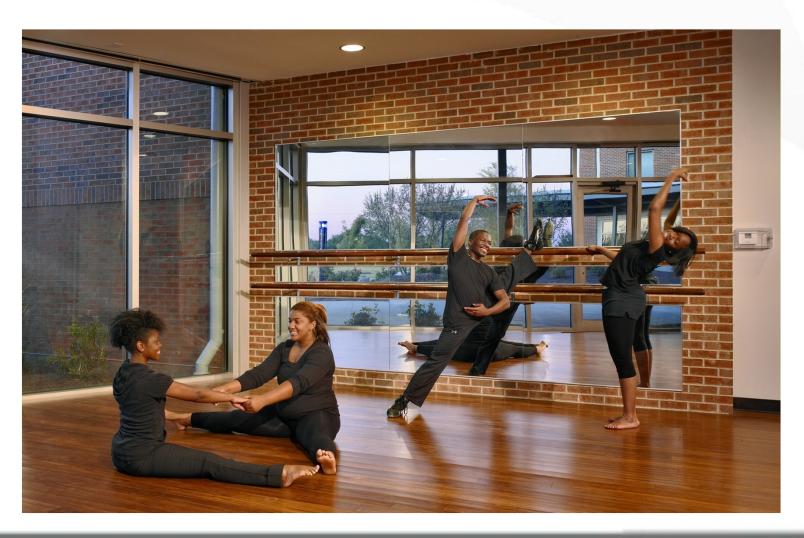






























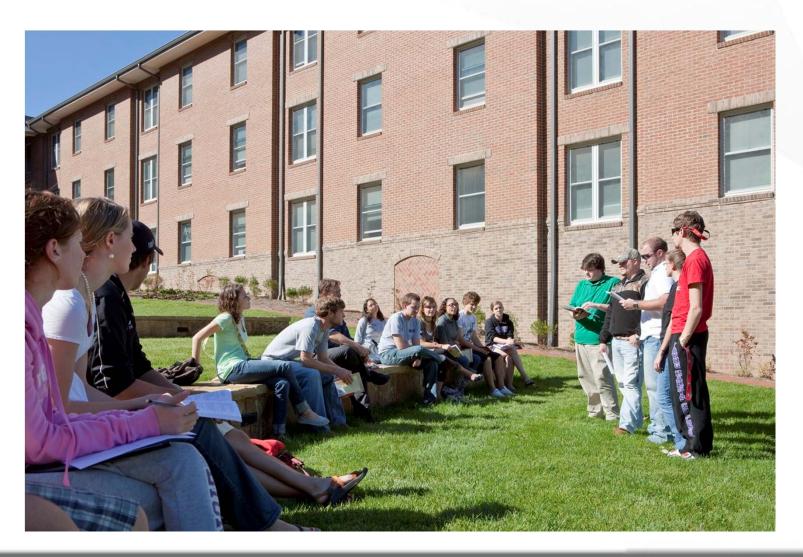




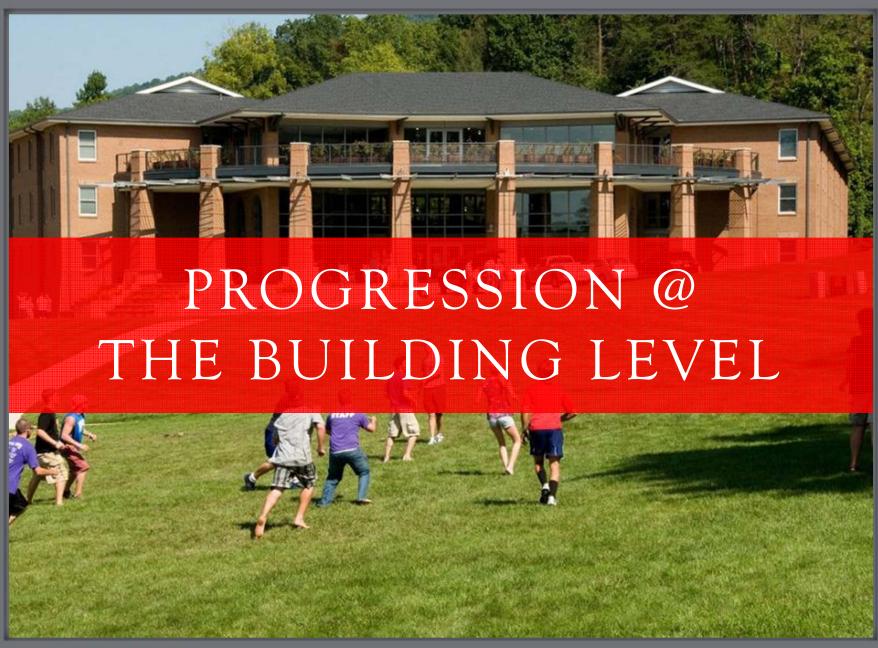




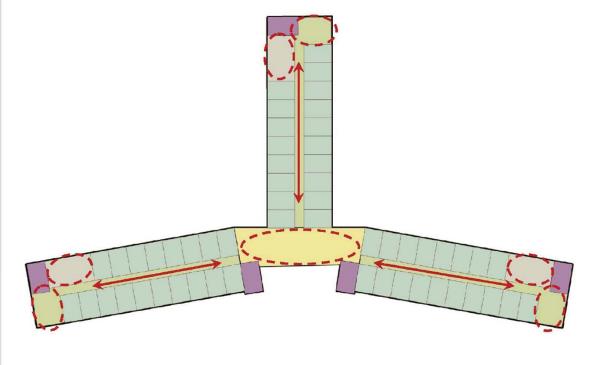
AMENITIES - COMMON SPACES







DORMITORIES



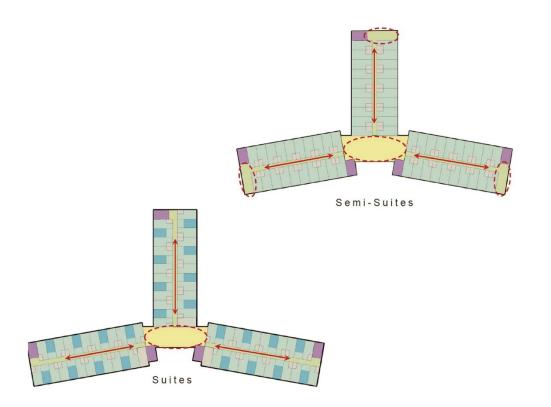
Traditional Dormitories are a very recognizable part of college life.

Sleeping rooms and community bathing and toilet facilities are accessed by a shared public corridor. Other small common spaces might be located on the same corridor, but the majority is concentrated on a single floor serving the entire building.

The distance between the bathrooms and some of the sleeping rooms along with the number of people sharing the bathrooms can produce a higher level of anonymity. While the model forces socialization on some level, accessibility of bathrooms through a public corridor tends to diminish the residents' sense of privacy.

Common spaces are experienced more as "destinations", reducing the frequency of incidental contact and therefore reducing their effectiveness

SUITES AND SEMI-SUITES



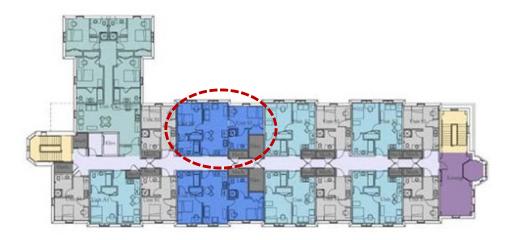
Suite and Semi-suites are a very good transitional housing prototype.

Each unit provides a higher level of privacy than a shared room, yet still limits the amount of amenity space within the private unit.

Each unit has its own bathroom and the sleeping rooms are commonly for one bed. Suites will typically have some form of common space within the unit such as living or kitchenette.

Public Amenity spaces are typically provided at the ends of halls, but could be arranged in more centralized fashions.

APARTMENTS



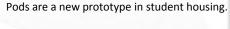
Apartments have quickly become ubiquitous with college life.

Each unit is a self-contained home for the student and provide a sense of ownership.

Each unit has its own bathroom and the sleeping rooms are commonly for one bed. Additionally, each unit has its own entertainment zone in the form of a living room and kitchen.

These types of units are an important part for a campus providing a growth pattern for their students. Since these type units encourage independence they are best suited for upper-classmen who already have a tight group of friends.

PODS



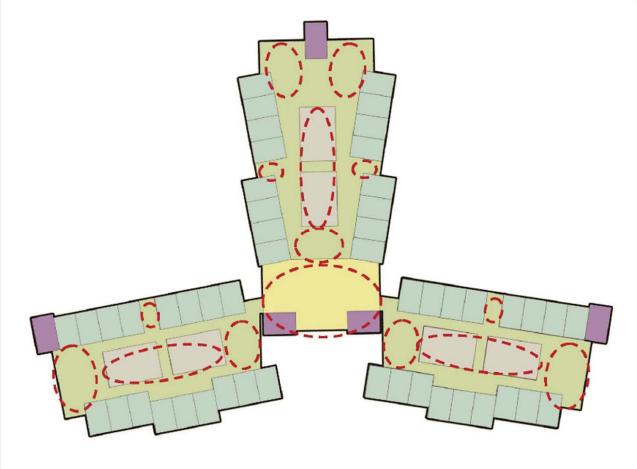
They encourage socialization with ample common space while reducing the institutional quality inherent to a corridor. The efficiency of combined common spaces and reduced private space results in the ability to provide ample social space.

Sleeping rooms are clustered in pods of 24-36 students, with community bathrooms and common spaces dedicated to each pod. Individual showers, each with a private dressing area, separate rooms for each toilet.

The configuration typically allows for higherquality finish materials. Proximity of the bathrooms and the more limited number of students sharing them serve to mitigate privacy concerns associated with traditional dormitories while promoting a high degree of socialization.

The location of sleeping rooms around common spaces instead of corridors both promotes social interaction, while the scale of the pods builds a sense of community among the cohort.

Building common areas are used to serve multiple pods and build community at the larger scale of floors and residence hall.



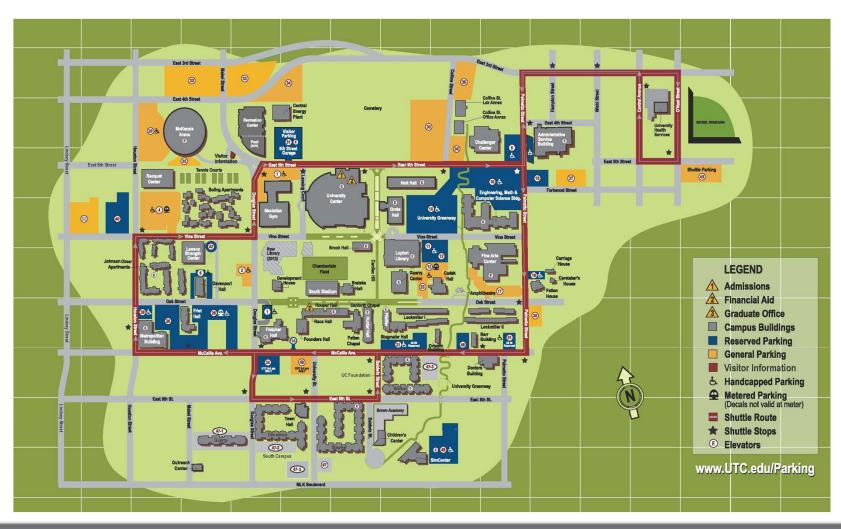


CASE STUDIES

Why the Time was Right for a Housing Master Plan

- Campus-wide Master Plan was to be conducted
- UTC had never conducted a Housing Master Plan
- Enrollment Growth
- Housing Occupancy Growth
- Nuances associated with university-owned housing and Public/Private partnership housing

CASE STUDIES



CASE STUDIES

Strategic Drivers for Housing Master Plan

- Aspire to enhance co-curricular opportunities
- Focus on community space, living-learning facilities
- Aspire to greatly improve the sense of community felt by students
- Better integration of "Quality of Life" facilities, and additional support spaces needed
- The University aspires to serve a wider range of students

CASE STUDIES

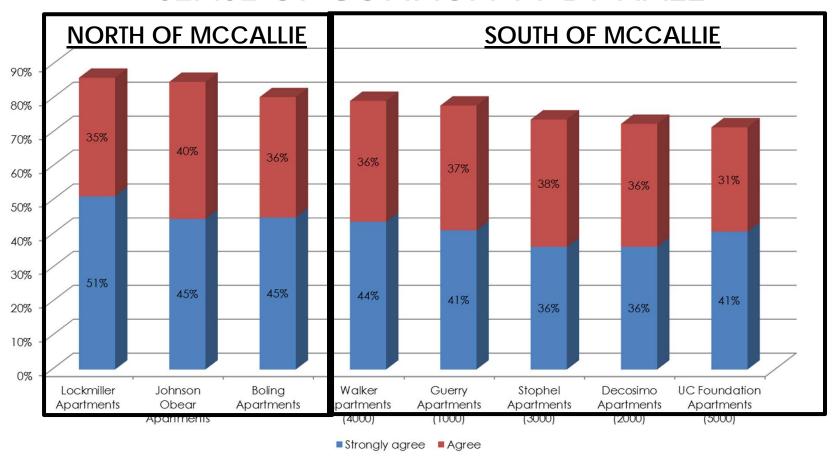
IMBALANCE BETWEEN SUPPLY AND DEMAND

~13,000 STUDENT ENROLLMENT (2019-2020 DEMAND)

| Classification | Traditional | Junior Suite | Full Suite | Apartment | Total |
|----------------------------|-------------|--------------|------------|-----------|-------|
| Freshmen | 258 | 362 | 414 | 1,730 | 2,763 |
| Sophomores | 123 | 147 | 249 | 1,265 | 1,783 |
| Juniors | 32 | 151 | 160 | 525 | 867 |
| Seniors | 58 | 104 | 78 | 288 | 526 |
| Graduate | 1 | 17 | 33 | 84 | 135 |
| Gross Demand | 471 | 780 | 933 | 3,891 | 6,074 |
| OCR | 1.10 | 1.15 | 1.15 | 1.40 | |
| OCR Adjusted Demand | 428 | 678 | 811 | 2,669 | 4,586 |
| Inventory As of 2012 | 0 | Ω | 145 | 2,948 | 3,093 |
| Net Demand (Surplus) | 428 | 678 | 666 | (279) | 1,493 |
| | | | | | |

CASE STUDIES

SENSE OF COMMUNITY BY HALL





CASE STUDIES

Housing Master Plan Recommendations

- North of McCallie: Brand as Freshmen Housing
 - Develop initial phases totaling $\sim 1,200$ new non-apartment beds (e.g., dormitories, pod housing, or semi-suites)
 - Focus on re-enforcing neighborhoods during siting
- South of McCallie: Brand as Upperclass Housing
 - Pursue pricing strategy to compete with the off-campus market
 - Identify opportunities to create community linkages (ex.: dining, community spaces, campus connection

CASE STUDIES

OCTOBER 4, 2013

Housing Master Plan Results





News Features Sports Opinion Crime Log Español

ECHO

Officials plan large, traditional student housing

SEPTEMBER 2, 2013 BY LEAH KIERNOZEK

Ly Leah Kiernozek, Chattanooga, TN-The increasing number of students enrolling at UTC each year has led to a very important question; where will they all go?

UTC officials are looking at several sites around campus to find the ideal location for new housing.

Associate Vice Chancellor Chuck Cantrell said the top choice for housing is the Tennessee state office building property along McCallie Avenue, which is

directly across the street from Frist Hall.

We hope to begin construction as soon as we secure a location with hopes that we could begin using the new building in

Once a location is established, officials plan to build a 600-bed facility with more traditional style student housing.

Research shows that having a mix of housing styles is important for a campus."

Currently, every housing complex on campus is apartment-style except for Stagmaier Hall, which was completely renovated last year.

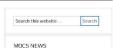
Rachael Harvey is a junior from Brentwood, Tenn., and she said she is excited UTC's campus is

"I am glad we are building new dorms," Harvey said. "Now maybe students won't have to live in the Choo-Choo anymore."

After four consecutive years of students living in hotels at the beginning of the semester, UTC has shown they have a demand for more housing, which is necessary in order to proceed with a selffunding project, Cantrell said.

FILED UNDER: NEWS TAGGED WITH: HOUSING

http://www.theutcecho.com/?p=7151





What do you hope next year's SGA can

C Improve on-campus safety C Fix infrastructure problems

(construction, parking, etc.)

Vate

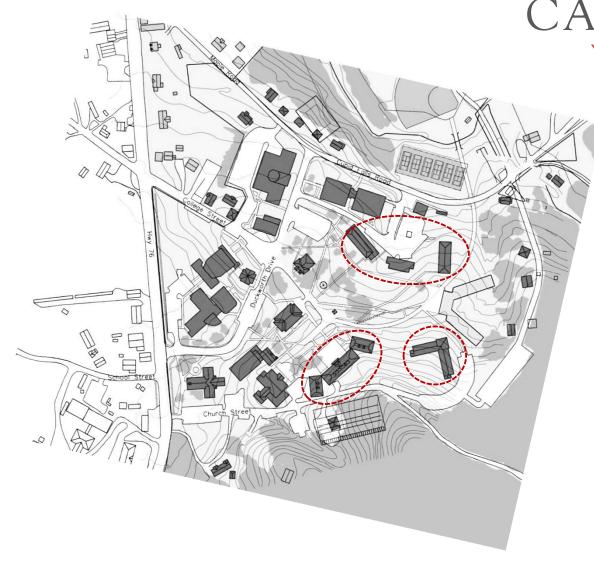
CONNECT WITH THE ECHO



YOUNG HARRIS COLLEGE

Why introduce Progressive Housing?

- Increase Housing portfolio.
- Improve recruitment.
- Enhance retention.
- Support College growth.







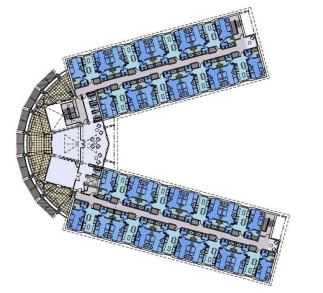
- Provide Sophomore focused housing
- Double Occupancy rooms
- 2 Bedroom Units
- Living area and Kitchenette provided
- Ample Amenity space with Live/Learn tie in











YOUNG HARRIS COLLEGE

Phase I

- **Provide Sophomore** focused housing
- Double Occupancy rooms
- 2 Bedroom Units
- Living area and Kitchenette provided
- Ample Amenity space with Live/Learn tie in

Roof Deck











YOUNG HARRIS COLLEGE

Phase II

- Provide Upper Classman focused housing
- Single Occupancy rooms
- 4 Bedroom Units
- Living area and Kitchen provided
- Amenity space with Live/Learn tie in

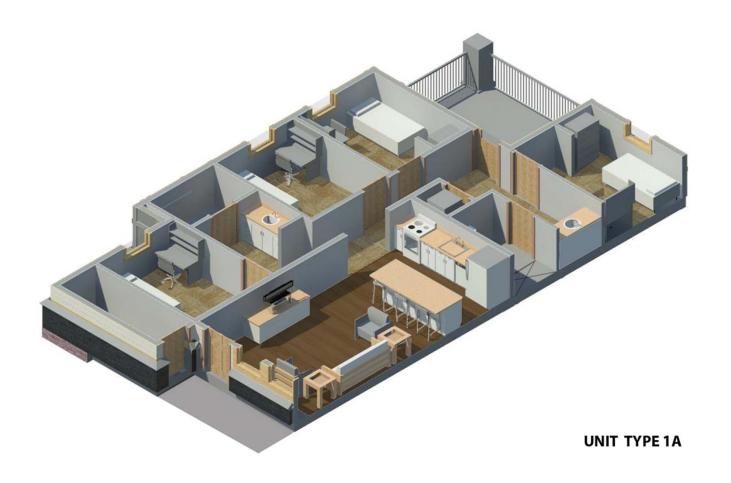




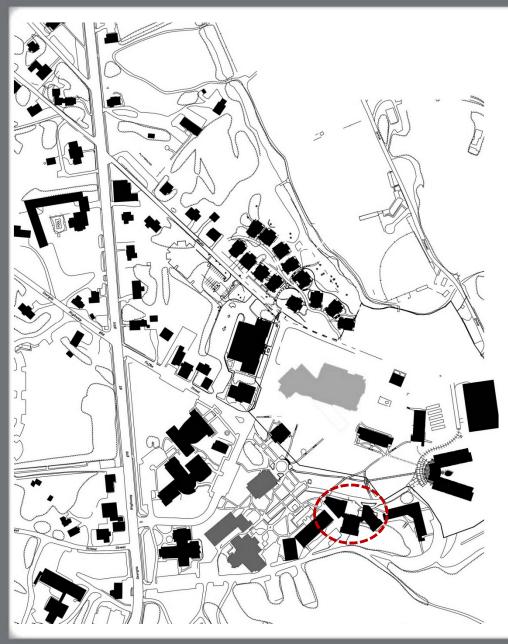








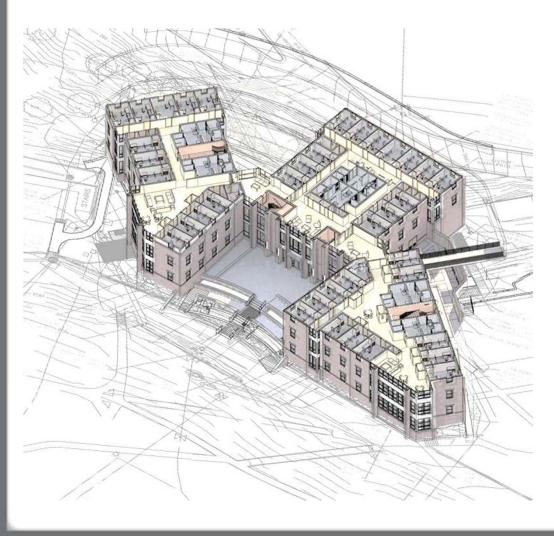




YOUNG HARRIS COLLEGE

Phase III

- Provide Freshman
 Focused Housing
- Pod Housing
- Double Occupancy rooms
- 26 Bedroom Units
- Living area provided
- Allows overall campus housing flexibility to upgrade remaining housing stock

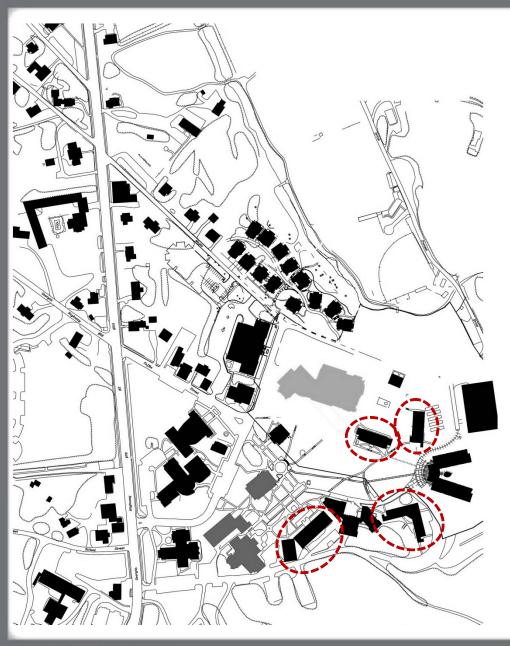


- Progressive Housing
- Provide Freshman
 Focused Housing
- Pod Housing
- Double Occupancy rooms
- ♦ 26 Bedroom Units
- Living area provided
- Allows overall campus housing flexibility to upgrade remaining housing stock









YOUNG HARRIS COLLEGE

Phase IV

 Update remaining Housing stock.

DISCUSSION







BUILDING COMMUNITY THROUGH STUDENT HOUSING

TACUHO PRESENTATION | OCTOBER 7, 2013

