NATIONAL HOUSING TRAINING INSTITUTE

PLANNING FOR HOUSING & RESIDENCE LIFE

PRESENTED BY BRAD NOYES | JUNE 7, 2013

BRAILSFORD & DUNLAVEY

acuho-i

JAMES C. GRIMM NHTi National Housing Training Institute

DIVISION OF STUDENT AFFAIRS UNIVERSITY HOUSING Serving Georgia Since 1806 THE UNIVERSITY OF GEORGIA

AGENDA

- Introduction
- Current Industry Observations
- Current Industry Background
- Predictive Analytics Planning
- Assessment Planning Tools
- Case Studies
- Current Industry Implications

INTRODUCTION

- Brad Noyes – Senior Vice President, Brailsford & Dunlavey
  - Been with the firm since its founding in 1993
  - Background in Architecture and Real Estate Development
  - Frequent lecturer at NHTI and many national higher education conferences
  - Frequent author of articles on planning and program management for a number of national publications
  - Experience with over 200 higher education campuses
    - Over $1 billion of program management and consulting
    - Over 250,000 beds of campus housing planning

INTRODUCTION

This project helped to identify our department as a catalyst for progressive thinking within our campus community. Thank you for providing us with thoroughly detailed analysis, spirited discourse, and lively presentations. I am using the information and supporting documentation practically daily as we develop our financial strategies.

-Mr. Tim Chapman
Associate Director for Facilities / Western Carolina University

Relevant Experience:

- Over 650 Higher Education Projects
- Over 250 Student Housing Projects

Project Staff:

- Atlanta, Boston, Charlotte, Chicago, Columbus, Detroit, Irvine, Washington DC
- Diverse Skill Sets and Backgrounds

Project Services:

- Planning
- Program Management
    - Project Scope Definition
    - Schedule and Budget Management
    - Professional Selections
    - Design & Construction Oversight
    - Communication/Logistics/QC
    - Furniture, Fixtures & Equipment
    - Project Close Out

BRAILSFORD & DUNLAVEY

CURRENT INDUSTRY OBSERVATIONS

Competencies, 1990

A. Personnel Management
B. Planning and Projection
C. Research Skills
D. Communication Skills
E. Diversity Awareness
F. Leadership
G. Counseling Skills
H. Institutional Organization
I. Students
J. Current Trends

Competencies, 2005

1. Decision Making
2. Interpersonal Communication
3. Budget and Resource Allocation
4. Crisis Management
5. Cooperation and Collaboration
6. Personal Characteristics
7. Staff Supervision
8. Ethics
9. Staff Selection
10. Strategic Thinking and Planning
11. Motivation
12. Organizational Culture
13. Interpretation of Institutional Goals
14. Networking
15. Assessment of Student Needs

Dunkel, N. W., & Schreiber, P. J. 1990
J. Diane Porter, PhD, ©2005
Included with permission.

CURRENT INDUSTRY OBSERVATIONS

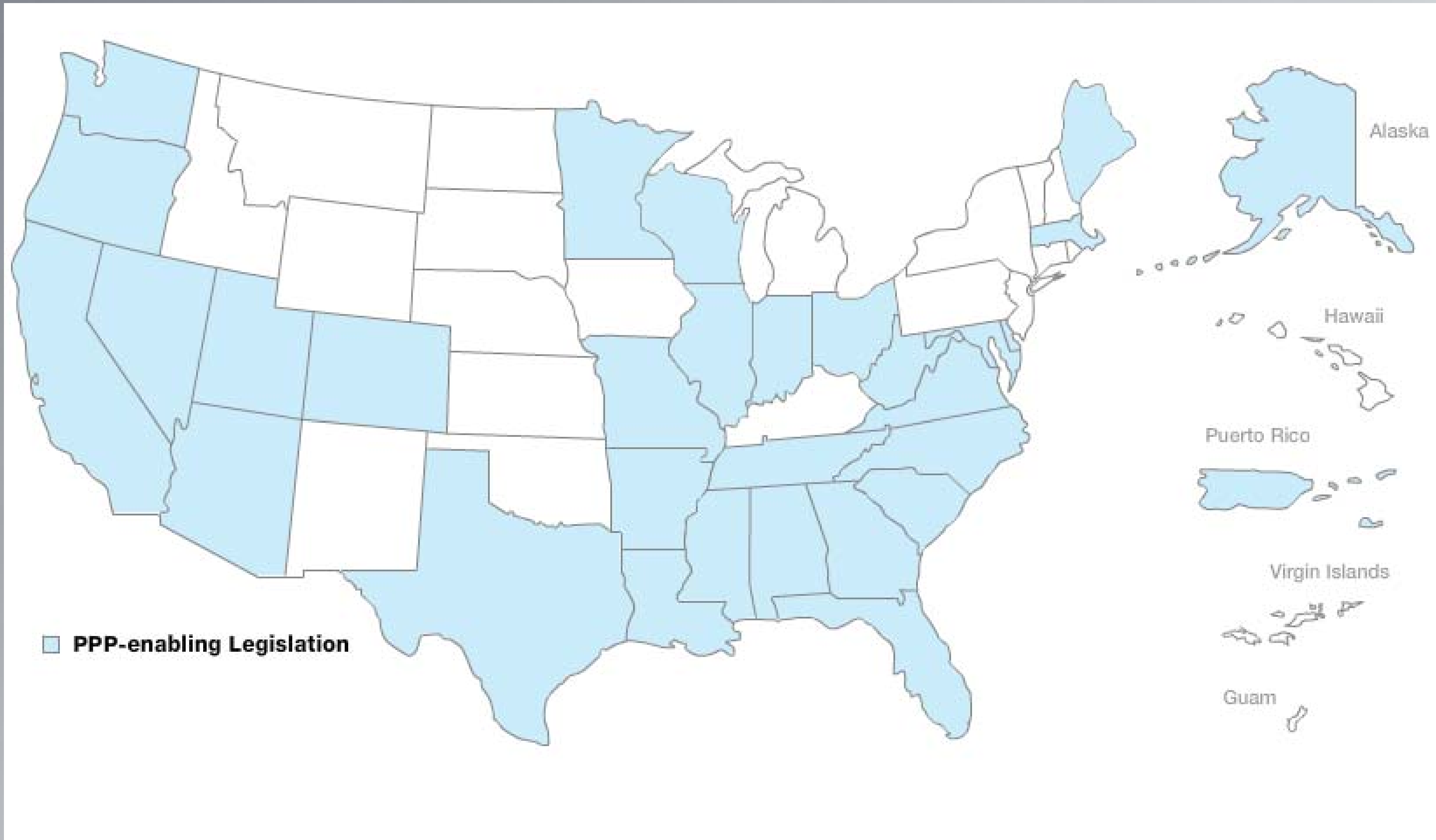
- Political Considerations
- Credit and Financing Factors
- Institutional Differentiation
- Strategic Considerations

BRAILSFORD & DUNLAVEY

CURRENT INDUSTRY OBSERVATIONS

- *The Current State of Public-Private Partnerships: Does It Make More or Less Sense in These Turbulent Financial Times?*
  2009 ACUHO-I Conference
- *Facilities Funding Thaws*
  2010 NACUBO Business Officer
- *Diverse Project Delivery is the New Reality*
  2010 SCUP Southeast
- *Public Private Partnership Panel Moderator*
  2012 SCUP Carolinas
- *State of the Off-Campus Development Market*
  2012 Student Housing Business Operations Exchange

CURRENT INDUSTRY OBSERVATIONS



CURRENT INDUSTRY OBSERVATIONS

Categories	2000	2007	Variance	% Change
Total Enrollment	15,312,000	18,249,000	2,937,000	19.2%
Total Off-campus Housing	13,247,872	15,665,612	2,417,740	18.3%
Total On-campus Housing	2,064,128	2,583,388	519,260	25.2%
Total PPP Housing	35,804	110,246	74,442	207.9%
Total Off-campus Housing as % of Total Enrollment	86.5%	85.8%		
Total On-campus Housing as % of Total Enrollment	13.5%	14.2%		
Total PPP Housing as % of Total On-campus Housing	1.7%	4.3%		

Note:
Enrollment data provided by the U.S. Department of Education and the National Center for Educational Statistics.
On-campus housing data provided by the U.S. Census Bureau and the National Center for Educational Statistics.
PPP housing data provided by George K. Baum and Company.
On-campus data includes off-campus properties that are affiliated with the institution (i.e. public-private partnerships).

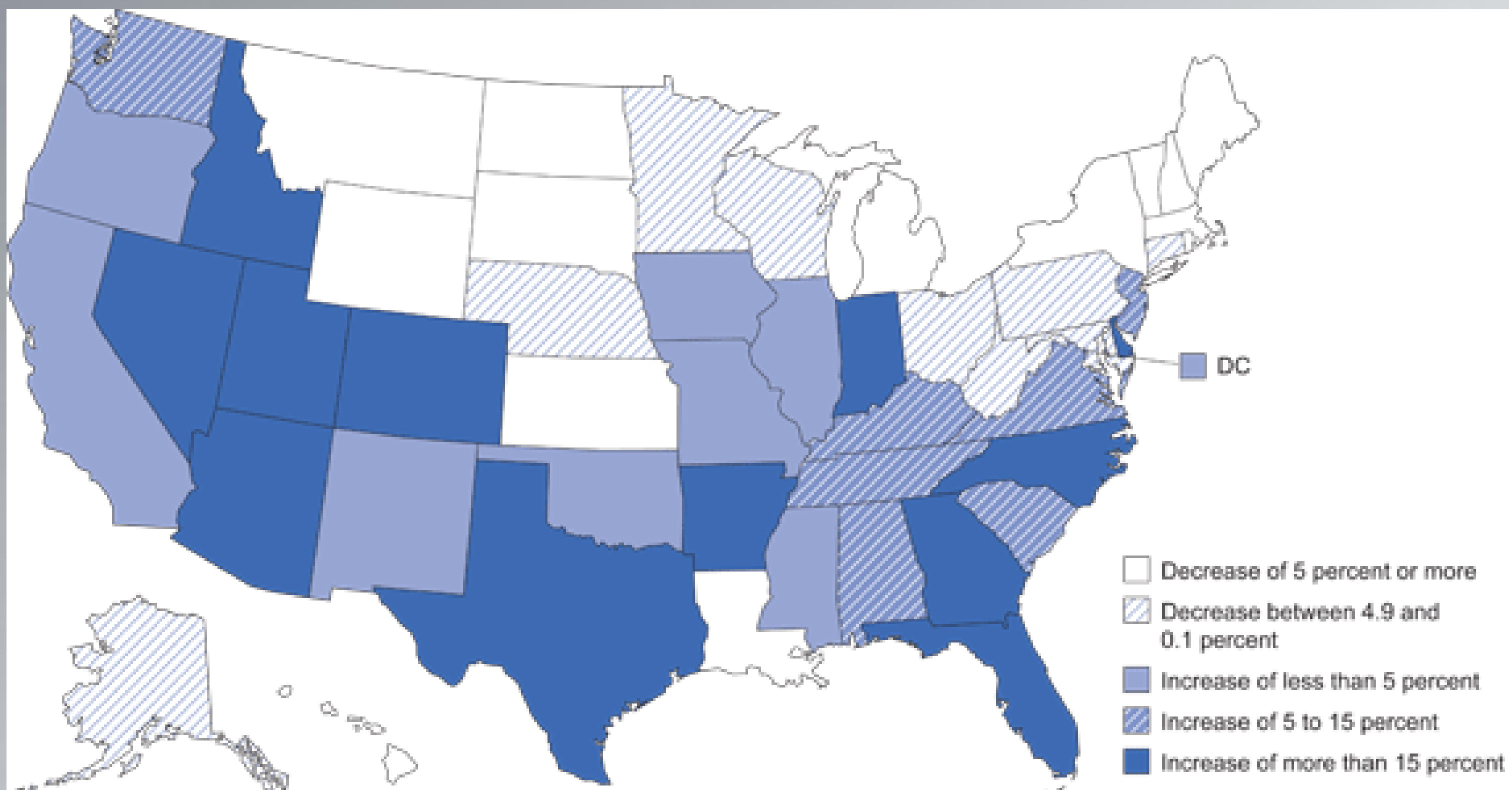
- Of the 4,300 plus higher education institutions, 2,252 offer on-campus housing
- On campus housing grew 25.2% from 2000-2007, exceeding total enrollment growth
- Total on-campus housing as a percentage of total enrollment grew from 13.5% to 14.2%

CURRENT INDUSTRY BACKGROUND

- 2007 to 2017:
  - High School Graduates → additional 22,000 students (+1%)
  - Total Enrollment → additional 2.1 million students (+12%)
- Other factors:
  - Undergraduates are enrolling for more than 4 years
  - Rise in non-traditionally aged and international student enrollment
  - Rise in 2-year college and graduate school enrollment
  - Community Colleges have expanded their interest
  - Transfer population impact

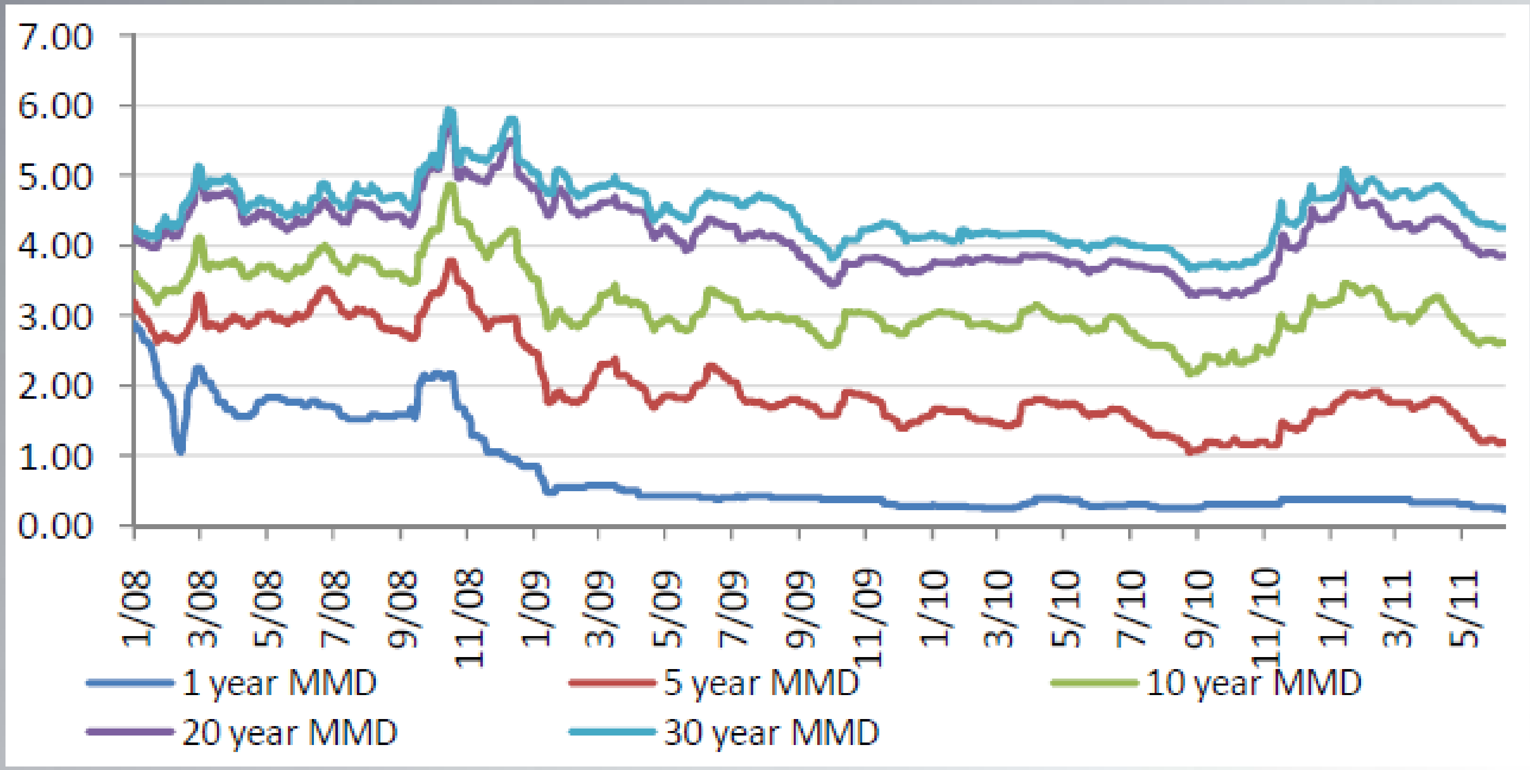
CURRENT INDUSTRY BACKGROUND

Projected percentage change in the number of public high school graduates, by state: 2007–08 through 2017–18 (Source: NCES)



BRAILSFORD & DUNLAVEY

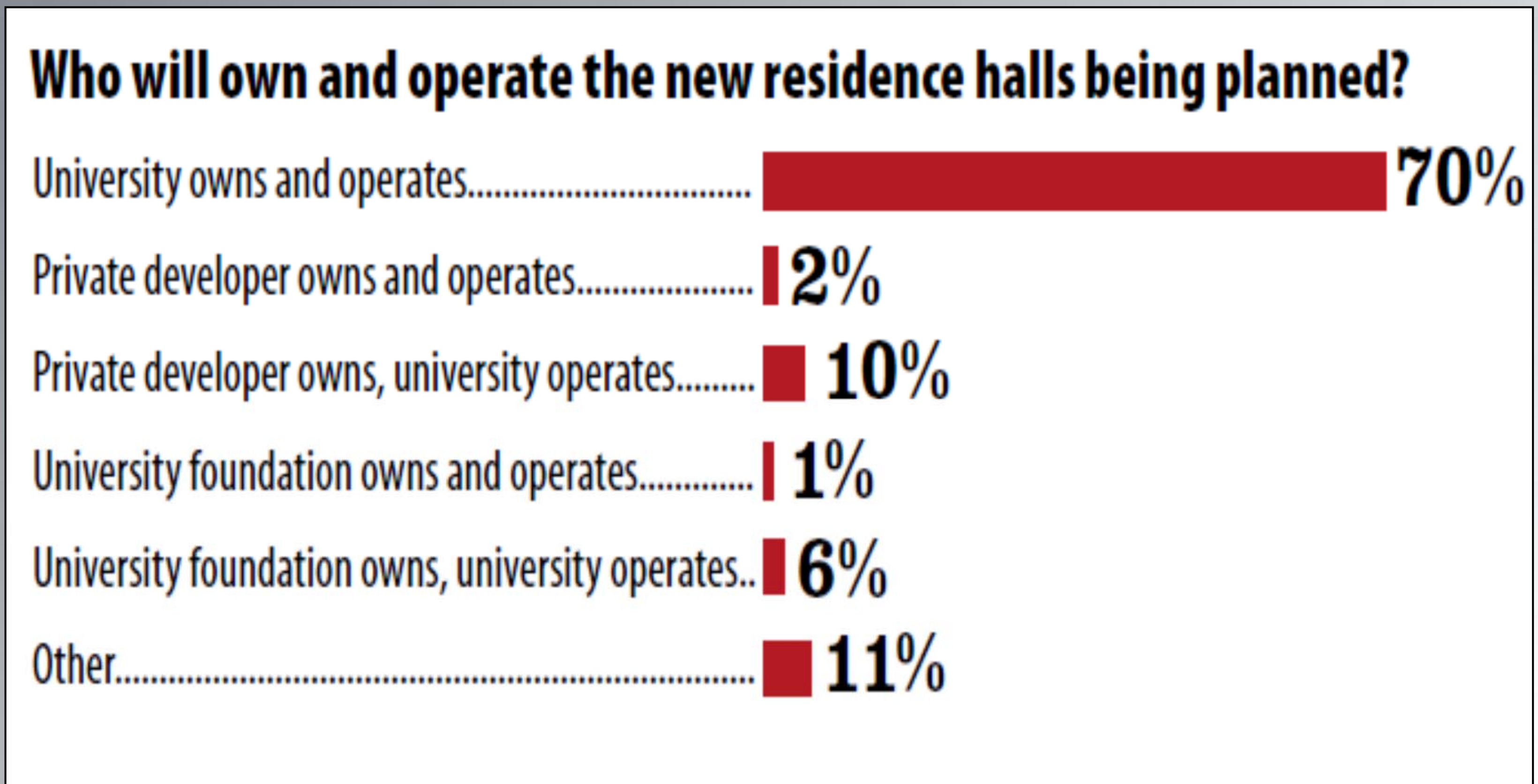
CURRENT INDUSTRY BACKGROUND



Morgan Keegan, Public Finance Market Comment, June 2011 www.morgankeegan.com

BRAILSFORD & DUNLAVEY

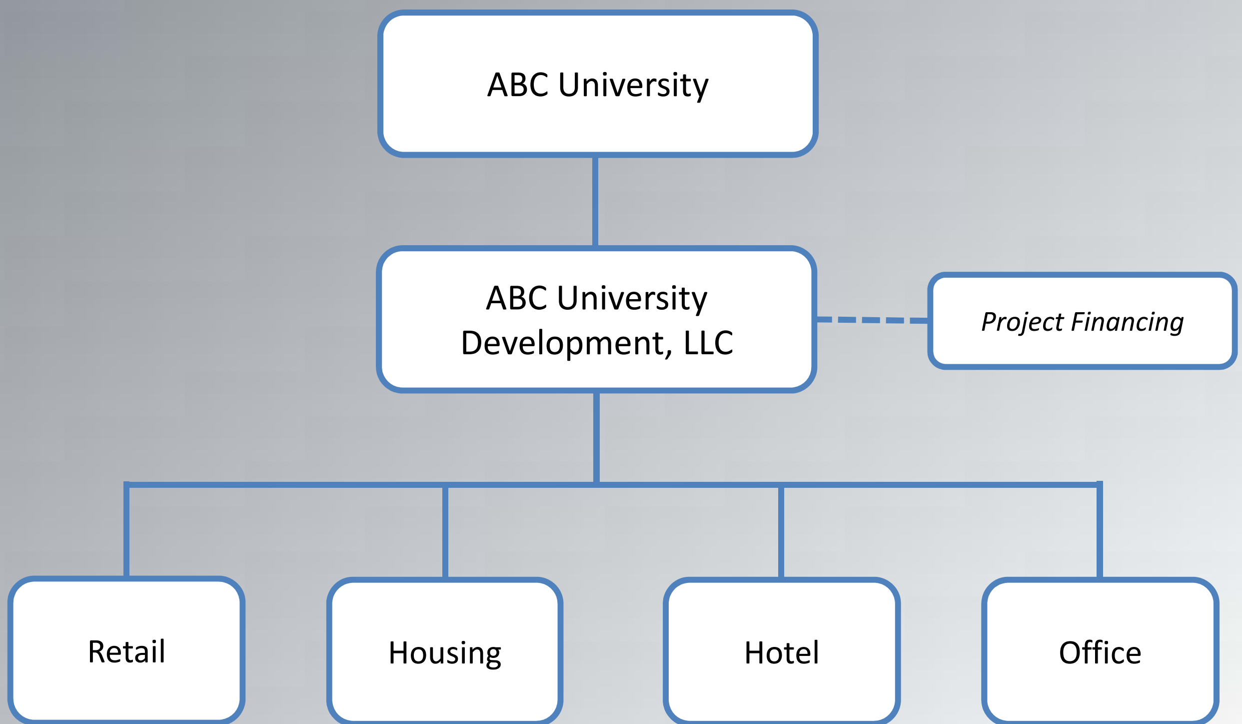
CURRENT INDUSTRY BACKGROUND



Abramson, Paul. "Living on Campus" 2012 College Housing Report. June 2012 www.webCPM.com.

CURRENT INDUSTRY BACKGROUND

SELF DEVELOPER

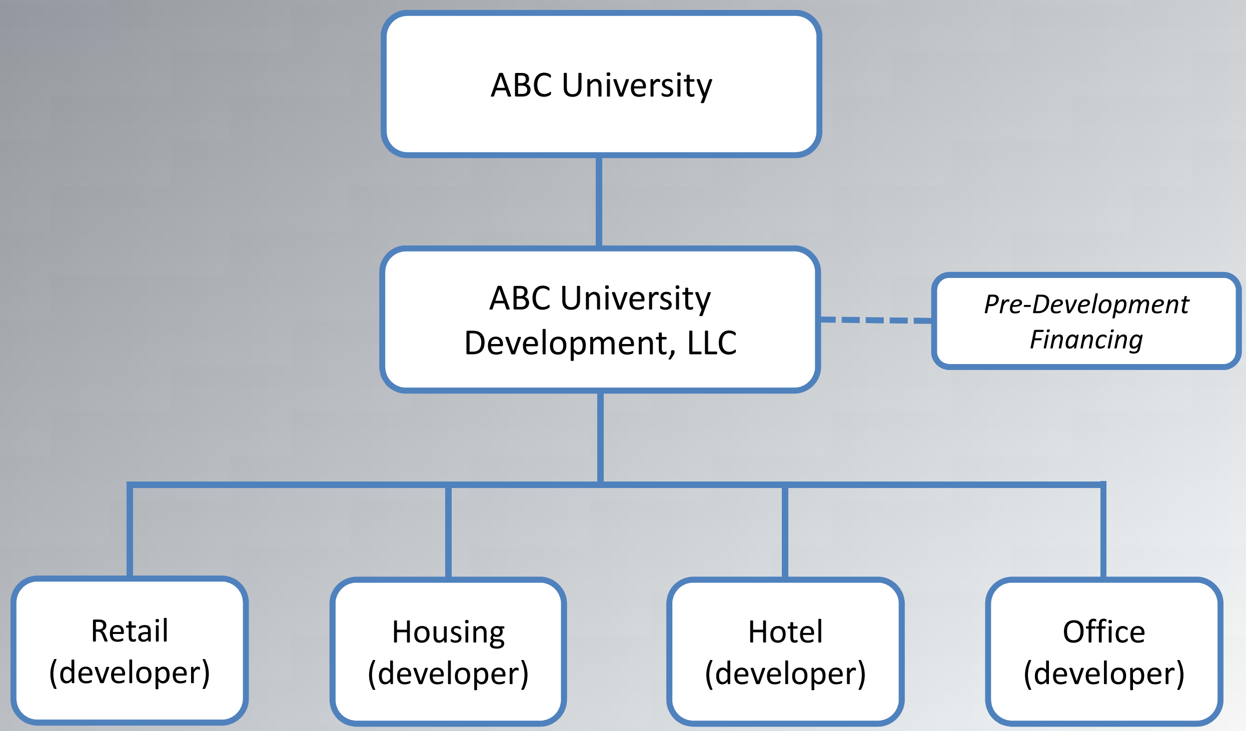


% Capital Commitment

% Proceeds

CURRENT INDUSTRY BACKGROUND

MASTER DEVELOPER

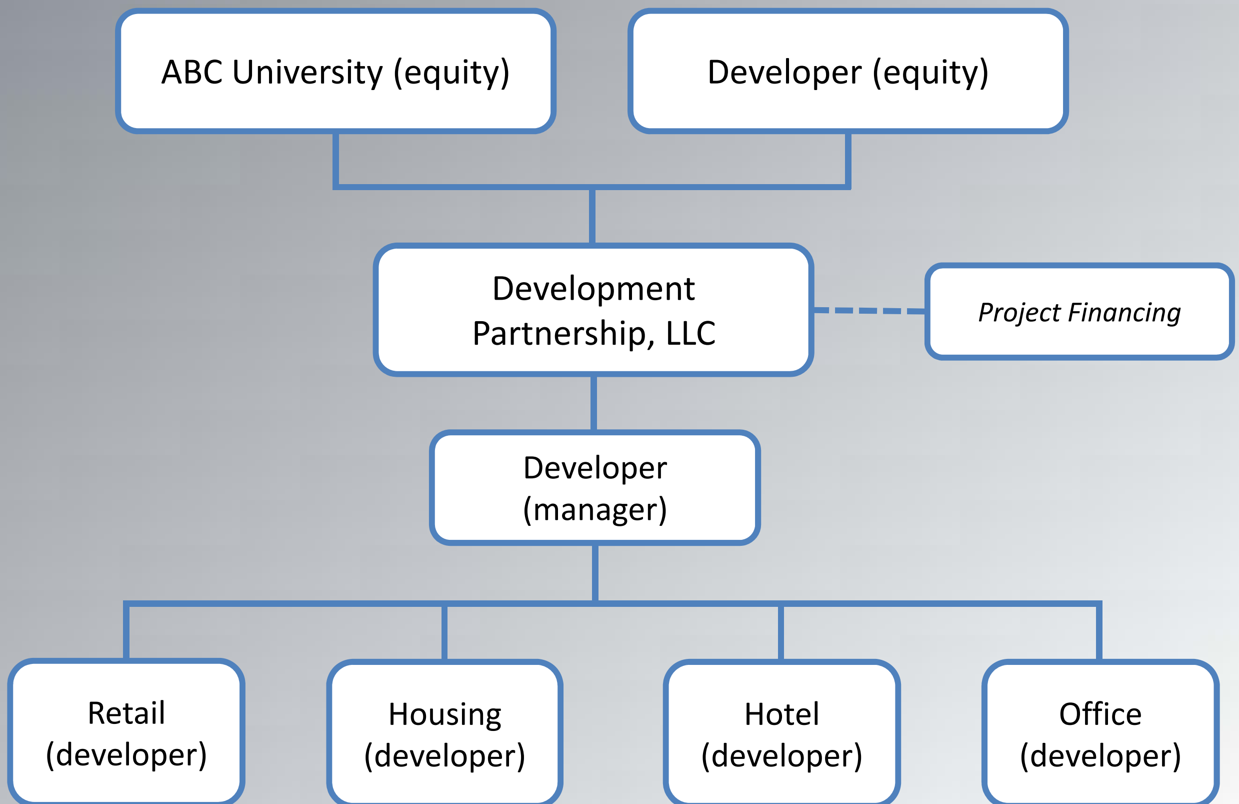


% Capital Commitment

% Proceeds

CURRENT INDUSTRY BACKGROUND

MASTER DEVELOPER PARTNERSHIP

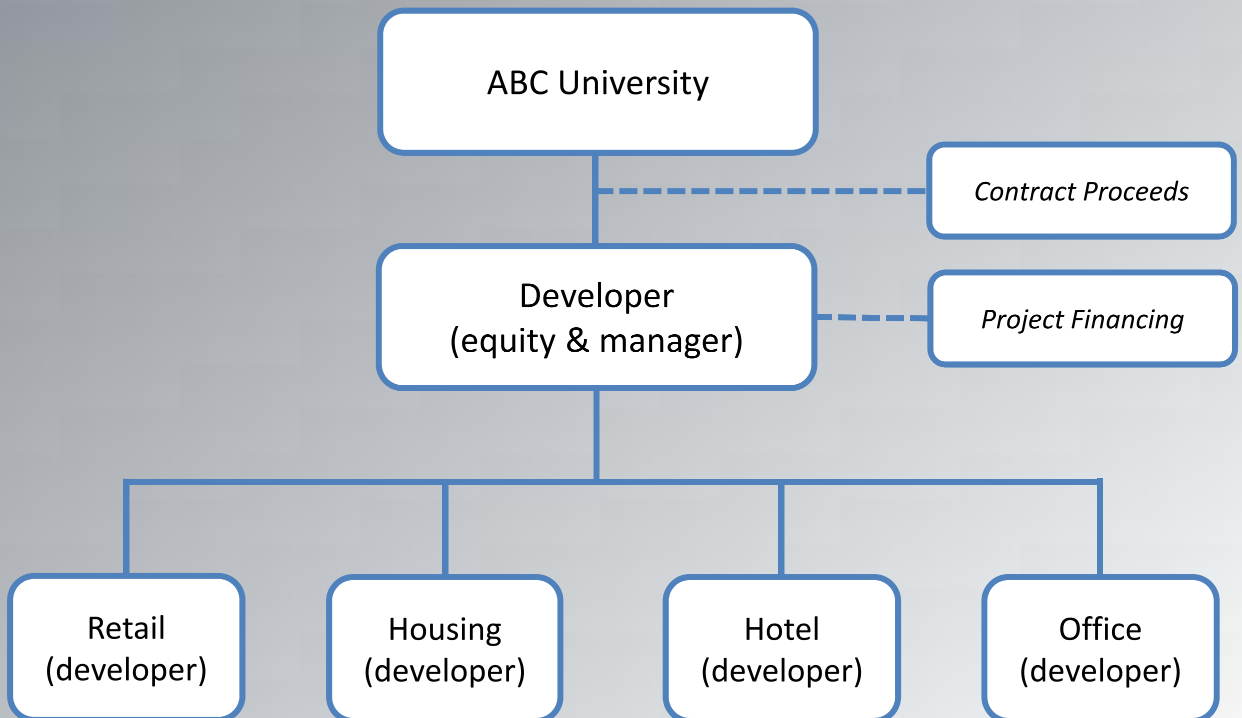


% Capital Commitment

% Proceeds

CURRENT INDUSTRY BACKGROUND

COMPREHENSIVE DEVELOPMENT PARTNER



% Capital Commitment

% Proceeds

BRAILSFORD & DUNLAVEY

PREDICTIVE ANALYTICS PLANNING

Predictive analytics is being embraced at an increasing rate by organizations that need to gain actionable and forward-looking insight from their data. Why? Companies realize that simply looking in the rearview mirror to obtain insight and make decisions is not enough to remain competitive. Companies want to better understand what actions their customers might take.

"The Top 5 Trends in Predictive Analytics", Dr. Fern Halper, Information Management, Nov 2011

Future Condition Accuracy = Methodology
(Critical Variables Identification, Depth of Analysis and Quality Assumptions)

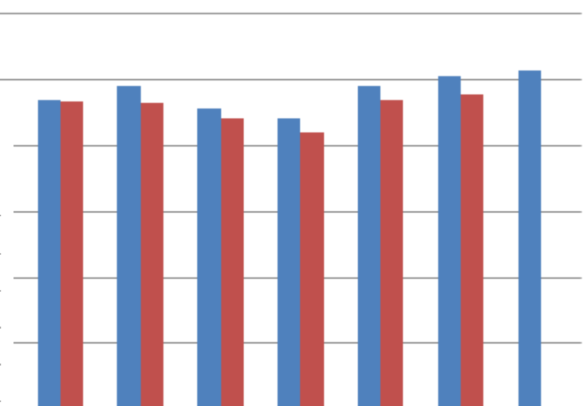
PREDICTIVE ANALYTICS PLANNING

15,000 Student Enrollment Demand Projections (Date: TBD)

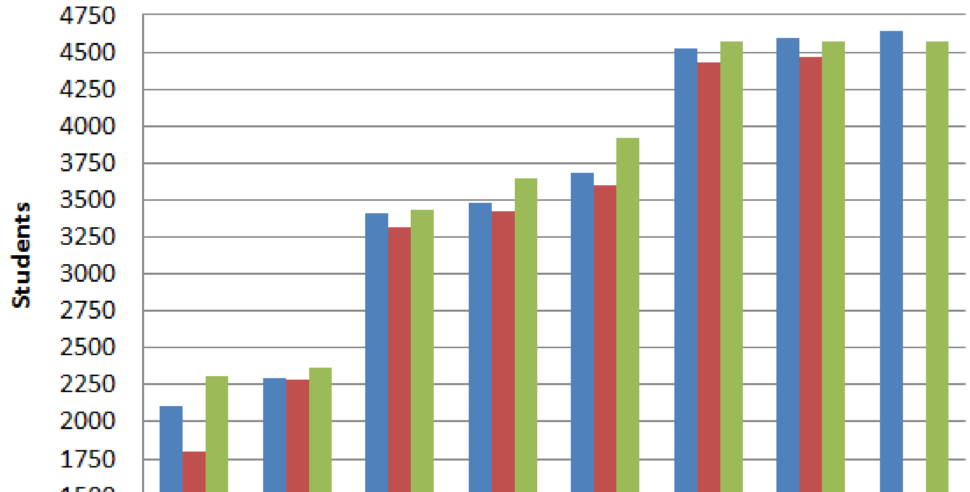
Classification	Traditional	Junior Suite	Full Suite	Apartment	Total
Freshmen	291	408	468	1,955	3,122
Sophomores	138	166	281	1,429	2,014
Juniors	36	172	182	599	989
Seniors	65	118	88	327	599
Graduate	1	19	37	95	153
Gross Demand	533	883	1,056	4,405	6,877
OCR	1.10	1.15	1.15	1.40	
OCR Adjusted Demand	**485**	**768**	**918**	**3,021**	**5,192**
Inventory As of 2012	0	0	145	2,948	3,093
Net Demand (Surplus)	**485**	**768**	**773**	**73**	**2,099**

PREDICTIVE ANALYTICS PLANNING

Old Dominion University
10 year Housing Master Plan



	2005	2006	2007	2008	2009	2010	2011
	96.90%	99.10%	95.70%	94.10%	99.10%	100.60%	101.51%
	96.70%	96.50%	94.10%	92.10%	96.90%	97.80%	0

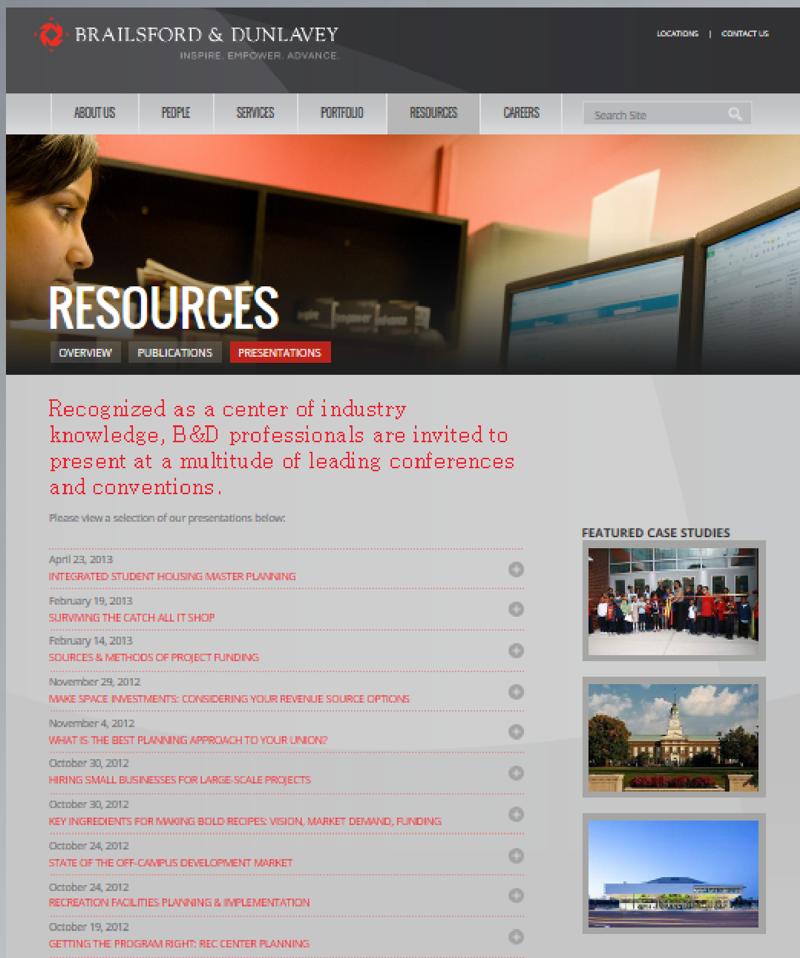


	2004	2005	2006	2007	2008	2009	2010	2011
Fall	2106	2295	3405	3487	3682	4528	4594	4647
Spring	1799	2288	3319	3425	3605	4426	4466	0
Capacity	2310	2367	3439	3643	3919	4567	4567	4567

* Data reflects at least one month into the semester except Fall, 2011 which is only one week for a preliminary report

BRAILSFORD & DUNLAVEY

ASSESSMENT PLANNING TOOLS



- Predictive Analytics
- Strategic Planning
- Market Analysis
- Financial Analysis
- Detailed Programming
- Site Analysis
- Operations Analysis
- Economic Impact Analysis
- Referendum Support
- Business Planning

ASSESSMENT PLANNING TOOLS

1. Strategic Asset Value
2. Demographic Analysis
3. Focus Group & Intercept Interviews
4. Off-Campus Market Analysis
5. Competitive Context Analysis
6. Student Survey
7. Demand Analysis
8. Financial Analysis
9. Phasing & Feasibility Analysis

ASSESSMENT PLANNING TOOLS

Strategic Drivers	1	2	3	4	5	6	7	8	9	10	X - Existing Conditions O - Targeted Aspiration
I. Educational Outcome Drivers											**Value Benchmarks**
a. Common Curricula and Experience		X						O			1 = The institution is comfortable with providing specialized academic experiences based upon field of study. As long as certain quality standards are met, academic programs and curricula are independently developed and maintained. Liberal arts is not emphasized and general use classrooms are not of great utility. 10 = The institution strongly believes that all of its students should graduate with certain common attributes, capacities, and skills. Accordingly, the core general requirements are highly prescriptive and centrally managed. Due to the importance of the core or common experience, the facilities that house these core programs will be centrally or prominently located and architecturally celebrated.
b. Experiential Learning		X							O		1 = The institution is comfortable with the traditional, instructor-led model of education that relies predominately on classroom lectures. Providing on-campus clinics, labs, incubator spaces and practical work / internship opportunities is not seen as vitally important to the academic experience. 10 = The institution believes that learning outcomes are enhanced when the student has the opportunity to apply what is learned within a practical context that often must be facilitated beyond the confines of a traditional classroom. Providing opportunities that directly and indirectly support curriculum is considered central to the academic experience, and appropriate facilities are provided prominently.
c. Spontaneous Intellectual Engagement & Discourse		X						O			1 = The institution believes that learning is mainly derived from a classroom experience focused on formalized technical training. Promoting self-guided intellectual growth or exploration is not a programmatic priority. 10 = The institution believes deeply in the value of the out of the classroom experience for developing intellectual curiosity, the capacity to think, and the ability to express ideas. The campus environment is designed to increase the probability that students, faculty, and staff will spontaneously engage with each other.
d. Graduation & Alumni Success Rates (Employment / Leadership Achievement / Advanced Degrees)							X			O	1 = The institution is committed to providing academic opportunities, but it is primarily the responsibility of the student to be driven and disciplined enough to graduate. As such, the desired graduation rates are achieved by attracting highly driven and qualified students and not through extensive academic support programs. 10 = The institution is focused on learning more than teaching, making student development and support a high priority. Accordingly, policies and programs that encourage student development such as live-on requirements for freshmen, learning communities, academic and career counseling centers, and tutoring services are heavily promoted.
e. Approach to Collaboration and Interdisciplinary Innovation	X							O			1 = The institution is comfortable allowing each academic discipline to stand independently. Faculty primarily collaborate within their departments, and with other professionals in similar departments at other universities. Accordingly, facilities are individually branded by department and are functionally and architecturally independent. 10 = The institution believes in interdisciplinary collaboration as a means of inspiring innovation and opening new channels for discovery. As such, facilities should be deliberately grouped according to complimentary functions, and situated such that they are functionally and architecturally integrated.
f. Extended Programs & Community Service		X							O		1 = Enhancing the local community is not an institutional mission driver. Community programs and opportunities are expected to fit into existing campus spaces regardless of inconvenience to the outside community. 10 = The institutional mission calls for enhancing the lives of the people that live in the community by sharing resources (facility rentals / library services, etc.) and providing services (non-degree classes, medical treatment, legal aid services, etc.). To help the community take advantage of these resources and services they are placed on the campus perimeter for easier access.
g. Institutional Growth			X					O			1 = There are no circumstances that can be envisioned that will require the institution to need more land to fulfill its mission. The institution's mission with respect to service responsibility does not apply pressure to grow enrollment or expand programs and the existing facilities are sufficiently sized. The physical evolution of the campus is achieved through redevelopment rather than expansion. 10 = The institution is in a growth and expansion mode to accommodate an expanding population and enhanced program quality and capacity. The institution will need several additional facilities to fulfill its mission, thus land assets are viewed as precious. It is imperative to maintain ownership of current assets and pursue opportunities for land asset acquisition.

ASSESSMENT PLANNING TOOLS

	Property	Address	Telephone	Distance (miles) From Campus	Driving Time (min.) From Campus	Total # of Units	Available Unit Types	Unit Types / Average Rent / Average Square Feet Per Unit				
								Studio	1BR	2BR	3BR	4BR
1	Applegate (Campus Walk)	333 Foster Street	(770) 834-0031	0.6	2	120	1BR/1BA, 2BR/2BA, 3BR, /BA		$519 / 528 SF	$765 / 614 SF	$945 / 700 SF	
2	Ashley Oaks	1121 Rome Street	(770) 832-7788	2.4	5	80	2BR/2BA, 3BR/3BA			$655 / 1,153 SF	$740 / 1457 SF	
3	Azalea Place	106 Azalea Place	(770) 830-6827	2.6	8	42	2BR/1.5BA			$560 / 950 SF		
4	Beulah Park	123 Beulah Church Road	(770) 836-0559	4.0	8	32	2BR/2BA			$895 / n/a		
5	Campus Quad	316 Columbia Drive	(770) 214-8435	2.5	6	168	2BD/2BA, 3BD/3BA, 4BD/4BA			$970 / 1,129 SF	$1,215 / 1,187 SF	$1,540 / 1,336 SF
6	Canterbury Heights	101 Mitchell Circle	(770) 836-0559	2.7	7	20	2BR/1BA			$575 / n/a		
7	Carrollton Place / Crossing	1205 Maple Street	(770) 214-0007	0.3	1	84	4BR/BA					
8	Cedar Street Townhomes	630 Cedar Street	(770) 834-2787	2.4	7	32	2BR/1.5BA			$568 / n/a		
9	Cedar Villas	624 Cedar Street	(770) 836-0559	2.4	7	15	2BR/2.5BA, 3BR/2.5BA					
10	Chateau	460 Hays Mill Road	(770) 832-9357	1.0	1	208	1BR/1BA, 2BR/2BA, 3BR, 2BA		$440 / 550 SF	$525 / 900 SF	$665 / 1,300 SF	
11	Mandeville Mill Lofts	367 Lovvorn Rd.	(770) 838.7545	1.4	2	78	2BR/1BA, 2BR/2BA, 3BR/1BA, 4BR/1BA, 4BR/2BA, 5BR/2BA	$440 / 800 SF	$525 / 800 SF	$660 / 1,100 SF	$700 / 1,450 SF	
12	River Place	915 Lovvorn Rd.	(770) 834-9393	1.7	4	132	2BR/2BA, 4BR/4BA			$920 / 975 SF		$1,496 / 1,442 SF
13	River's Edge	227 Brumbelow Rd.	(770) 836-1774	1.5	5	48	4BR/4BA					$1,336 / n/a
14	South Ridge Apartments	705 South St.	(770) 834-6240	0.6	2	50	2BR/1.5A			$560 / 1,050 SF		
15	The Grove	919 Lovvorn Rd.	(770) 830-7881	1.2	2	162	4BR/4BA					
16	University Lofts	780 Lovvorn Rd.	(770) 830-0010	1.0	3	76	4BR/4BA					$1,540 / 1,360 SF
17	Waverly Apartments	103 Waverly Way	(770) 836-0559	3.4	7	80	Studio, 1BR/1BA, 2BR/1BA					
18	Westbury Park	124 Williams St.	(770) 836-0559	2.1	4	16	2BR/1.5BA					
19	West Ridge Villas	230 West Ave.	(770) 836-0059	2.0	5	7	2BR/2.5BA, 3BR/2.5BA					
20	Woodglen	114 Danny Dr.	(770) 832-0403	3.9	8	188	2BR/1BA, 2BR/1.5BA, 2BR/2BA			$535 / 900 SF		

ASSESSMENT PLANNING TOOLS

Academic Year (fall year)	0 2010	1 2011	2 2012	3 2013	4 2014	5 2015	6 2016	7 2017	8 2018	9 2019	10 2020
Total Bed Supply (including RA's)	2,787	2,787	2,922	3,073	3,236	3,084	2,893	3,084	3,084	3,084	3,084
Total Gross Square Footage	653,970	653,970	688,684	733,387	754,268	792,184	741,065	792,184	792,184	792,184	792,184
Revenue											
Student Room Revenue	$10,252,000	$10,663,000	$12,329,000	$13,760,000	$15,232,000	$15,320,000	$15,081,000	$16,672,000	$17,341,000	$18,034,000	$18,756,000
Social Fee	$56,000	$57,000	$62,000	$67,000	$72,000	$71,000	$69,000	$75,000	$78,000	$80,000	$82,000
Room Deposit (per bed)	$496,000	$511,000	$567,000	$612,000	$677,000	$667,000	$648,000	$711,000	$732,000	$752,000	$776,000
Misc. Revenue & Conferences	$414,000	$426,000	$439,000	$452,000	$466,000	$480,000	$494,000	$509,000	$524,000	$540,000	$556,000
Total Revenue	$11,218,000	$11,657,000	$13,397,000	$14,891,000	$16,447,000	$16,538,000	$16,292,000	$17,967,000	$18,675,000	$19,406,000	$20,170,000
Expense											
Personnel											
Personal Service	$1,191,000	$1,225,000	$1,070,000	$984,000	$1,056,000	$1,169,000	$1,092,000	$1,240,000	$1,278,000	$1,315,000	$1,356,000
Fringe Benefit	$200,000	$206,000	$440,000	$639,000	$667,000	$698,000	$701,000	$741,000	$764,000	$788,000	$810,000
Travel	$11,000	$11,000	$53,000	$88,000	$90,000	$95,000	$98,000	$102,000	$104,000	$107,000	$109,000
Operating Expense											
Operating	$2,086,000	$2,148,000	$1,873,000	$1,724,000	$1,852,000	$2,047,000	$1,914,000	$2,173,000	$2,237,000	$2,305,000	$2,373,000
Operating (R&M)	$174,000	$178,000	$613,000	$976,000	$1,012,000	$1,053,000	$1,068,000	$1,117,000	$1,150,000	$1,185,000	$1,221,000
University Offset											
PS Offset	$1,650,000	$1,650,000	$1,397,000	$1,249,000	$1,301,000	$1,397,000	$1,268,000	$1,397,000	$1,397,000	$1,397,000	$1,397,000
AE Offset	$21,000	$21,000	$358,000	$617,000	$618,000	$621,000	$619,000	$621,000	$621,000	$621,000	$623,000
Travel Offset	$1,000	$1,000	$5,000	$8,000	$9,000	$11,000	$11,000	$11,000	$11,000	$11,000	$11,000
Operating Offset	$1,314,000	$1,353,000	$1,181,000	$1,086,000	$1,169,000	$1,291,000	$1,207,000	$1,370,000	$1,411,000	$1,453,000	$1,496,000
Total Expense	$6,648,000	$6,793,000	$6,990,000	$7,371,000	$7,774,000	$8,382,000	$7,978,000	$8,772,000	$8,973,000	$9,182,000	$9,396,000
Net Operating Income	$4,570,000	$4,864,000	$6,407,000	$7,520,000	$8,673,000	$8,156,000	$8,314,000	$9,195,000	$9,702,000	$10,224,000	$10,774,000

Academic Year (fall year)	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Debt Service											
Existing Debt Service	$3,354,921	$3,443,167	$3,451,731	$3,475,046	$3,480,746	$3,541,372	$3,571,883	$3,607,055	$3,643,722	$3,661,800	$3,700,298
Additional Rents	$462,000	$477,000	$504,000	$534,000	$590,000	$589,000	$617,000	$648,000	$674,000	$708,000	$738,000
New Debt Service	$0	$0	$1,417,000	$2,536,000	$2,536,000	$3,531,000	$4,135,000	$4,135,000	$4,135,000	$4,135,000	$4,135,000
Total Debt Service	$3,816,921	$3,920,167	$5,372,731	$6,545,046	$6,606,746	$7,661,372	$8,323,883	$8,390,055	$8,452,722	$8,504,800	$8,573,298
Debt Coverage Ratio	1.20	1.24	1.19	1.15	1.31	1.06	1.00	1.10	1.15	1.20	1.26

Academic Year (fall year)	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Reserves											
Reserves/Depreciation	$326,000	$326,000	$230,000	$166,000	$200,000	$169,000	$129,000	$169,000	$169,000	$169,000	$169,000
New Hall Reserves	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Total Reserves	$326,000	$326,000	$230,000	$166,000	$200,000	$169,000	$129,000	$169,000	$169,000	$169,000	$169,000
Cumulative Reserves	$326,000	$652,000	$882,000	$1,048,000	$1,248,000	$1,417,000	$1,546,000	$1,715,000	$1,884,000	$2,053,000	$2,222,000

Academic Year (fall year)	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Cash Flow											
Total Cash Flow	$427,079	$617,833	$804,269	$808,954	$1,866,254	$325,628	-$138,883	$635,945	$1,080,278	$1,550,200	$2,031,702
Cumulative Cash Flow	$427,079	$1,044,912	$1,849,181	$2,658,135	$4,524,389	$4,850,017	$4,711,134	$5,347,079	$6,427,357	$7,977,557	$10,009,259

ASSESSMENT PLANNING TOOLS

Academic Year (fall year)	2012	2013	2014	2015	2016
Residence Hall					
Bowdon	On-line	Under Reno./Constr.	Renovated	Renovated	Renovated
Boykin	Off-line	Off-line	Off-line	Off-line	Off-line
Downs	Off-line	Off-line	Off-line	Off-line	Off-line
Gunn	On-line	On-line	Under Reno./Constr.	Renovated	Renovated
Strozier Annex	On-line	On-line	On-line	On-line	On-line
Watson	On-line	On-line	On-line	Off-line	Off-line
Tyus	On-line	On-line	On-line	On-line	Under Reno./Constr.
University Suites	On-line	On-line	On-line	On-line	On-line
Arbor View Apartments	On-line	On-line	On-line	On-line	On-line
New Semi Suites @ US	New Housing	New Housing	New Housing	New Housing	New Housing
New Semi Suites @ B/D	Under Reno./Constr.	New Housing	New Housing	New Housing	New Housing
Existing Residence Hall GSF	553,684	494,887	456,971	399,935	348,816
New/Renovated Residence Hall GSF	135,000	238,500	297,297	335,213	335,213
Total Residence Hall GSF	**688,684**	**733,387**	**754,268**	**735,148**	**684,029**
Existing Residence Hall Beds	2,322	2,013	1,867	1,569	1,378
New/Renovated Residence Hall Beds	600	1,060	1,369	1,515	1,515

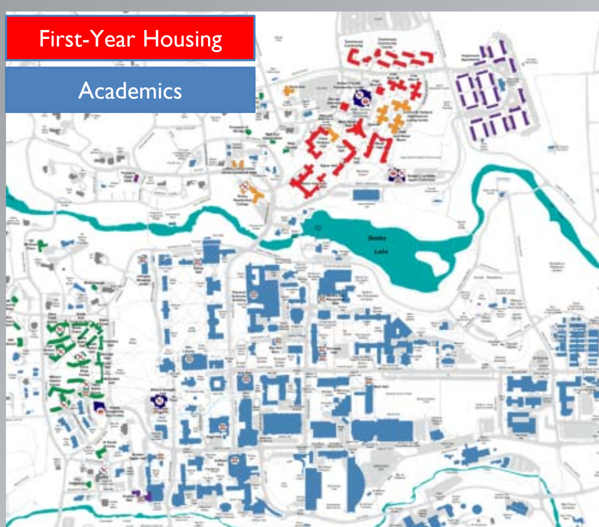
BRAILSFORD & DUNLAVEY

CASE STUDIES

How does on campus housing respond to enrollment growth?

CASE STUDIES

HOW DOES HOUSING RESPOND TO ENROLLMENT GROWTH?



QUICK FACTS:

ENROLLMENT: 21,131

- Undergraduate FT Enrollment
  - 14,167
  - 47% Live On Campus
- Graduate Enrollment
  - 6,964
  - 12% Live On Campus

NUMBER OF BEDS: ~7,200

TYPE: Traditional, Semi-Suite, Suite, Apartment

SETTING: Small Town
2009

CASE STUDIES

HOW DOES HOUSING RESPOND TO ENROLLMENT GROWTH?

- Increase first year housing in response to enrollment
- Address upperclassman housing lottery system
- Impact of new west campus housing project
- Poor quality graduate student housing supply

PROCESS & TOOLS

STRATEGIC VISIONING

MARKET ANALYSIS

STUDENT SURVEY

DEMAND PROJECTIONS

FINANCIAL ANALYSIS

CAPITAL BUDGETING

CAPITAL PROJECTS PHASING

PPP ANALYSIS

CONSENSUS BUILDING

CASE STUDIES

How do changing student demographics impact on campus housing?

BRAILSFORD & DUNLAVEY

CASE STUDIES

HOW DO CHANGING STUDENT DEMOGRAPHICS IMPACT?

QUICK FACTS:

ENROLLMENT: 35,838

- Undergraduate FT Enrollment
  - 24,929
  - 35% Live On Campus
- Graduate Enrollment
  - 9,304
  - 9% Live On Campus

NUMBER OF BEDS: ~9,500

TYPE: Traditional, Semi-Suite, Suite, Apartment

SETTING: Urban

2010, 2011

CASE STUDIES

HOW DO CHANGING STUDENT DEMOGRAPHICS IMPACT?

- Graduate housing is mission critical
- Attract more out of state & international students
- Strong off campus market targeting upperclassman
- Develop new junior, senior, grad community

PROCESS & TOOLS

STRATEGIC VISIONING

MARKET ANALYSIS

STUDENT SURVEY

DEMAND PROJECTIONS

PPP ANALYSIS

CONSENSUS BUILDING

How can on campus housing be integrated with other opportunities to maximize impact?

CASE STUDIES

HOW DOES CAMPUS HOUSING ALIGN WITH INITIATIVES?




QUICK FACTS:

ENROLLMENT: 28,916

- Undergraduate FT Enrollment
  - 17,300
  - 56% Live On Campus
- Graduate Enrollment
  - 10,800
  - 4% Live On Campus

NUMBER OF BEDS: ~10,100

TYPE: Traditional, Semi-Suite, Suite, Apartments

SETTING: Small City
1999, 2004, 2009

BRAILSFORD & DUNLAVEY

CASE STUDIES

HOW DOES CAMPUS HOUSING ALIGN WITH INITIATIVES?

- Long term, phased housing approach
- Coordinated addition of student life projects
- Development of new pedestrian circulation network
- New campus comprehensive development

PROCESS & TOOLS

STRATEGIC VISIONING

MARKET ANALYSIS

STUDENT SURVEY

WORKFORCE HOUSING ANALYSIS

DEMAND PROJECTIONS

FINANCIAL ANALYSIS

REAL ESTATE ANALYSIS

LAND USE ANALYSIS

CONSENSUS BUILDING

CURRENT INDSTRY IMPLICATIONS

- HIGHLY Dynamic Environment
- Unpredictable External Factors
- Range of Complex Structures
- Importance and Role of Data
- Integration with Strategic Goals

Brad Noyes – Senior Vice President
Brailsford & Dunlavey
bnoyes@programmanagers.com
P 704-367-8501

Follow up information:
www.programmanagers.com

NATIONAL HOUSING TRAINING INSTITUTE

PLANNING FOR HOUSING & RESIDENCE LIFE

PRESENTED BY BRAD NOYES | JUNE 7, 2013

BRAILSFORD & DUNLAVEY