

EASTERN MICHIGAN UNIVERSITY



Housing Master Plan Update – Admin Professionals

December 6, 2018

Agenda

December 6, 2018

- Work Plan
- Focus Group Feedback
- Competition Assessment
 - Off Campus Marketplace
 - Peer Institutions
- Student Survey Analysis
- Demand Analysis
- Considerations & Next Steps



Why Are We Here?

December 6, 2018

- Non-Enrolled Student Data
- Competition From Peers
- Hired A Consultant To Guide Housing Master Planning



Work Plan

Student Housing Market Study + Housing Master Plan

Student Housing Market Study

Kickoff & Data Gathering

- ✓ Doc + Data Review
- ✓ Kickoff Meetings
- ✓ Stakeholder Interviews
- ✓ Student Focus Groups
- ✓ Steering Committee Engagement

Market Analysis

- ✓ Off-campus Market
- ✓ Peer & Aspirant Institutions
- ✓ Enrollment Review
- ✓ Supply Analysis
- ✓ Historical Capture Rate & Projected
- ✓ Enrollment Review
- ✓ Demand Analysis
- ✓ Supply / Demand Reconciliation

Housing Master Plan

Implementation & Phasing

Reconciliation

- ✓ Deferred Maintenance / Renovation Assessment

- ✓ Capacity & Program Alignment Analysis
 - Demo / Reno / New Construction Determination

Presentations

- ✓ Steering Committee
- ✓ Student Government
- ✓ Executive Team
- ✓ Budget Council
- ✓ Senior Housing Management

Approval & Documentation

- Presentation of Final Findings & Recommendations
- Housing Master Plan Report Development

Student Survey Analysis

Demographics

2,123

total respondents

11%

total response rate

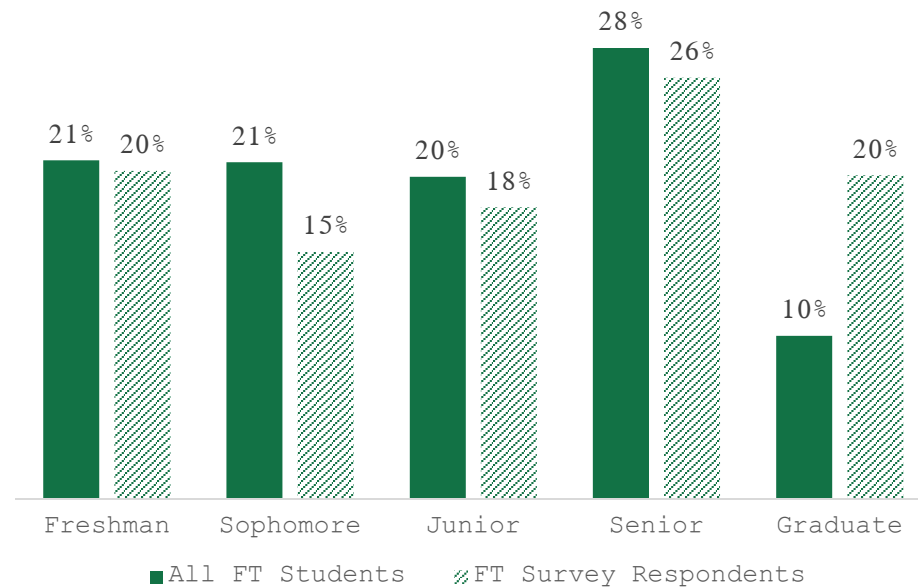
16%

full-time

response rate

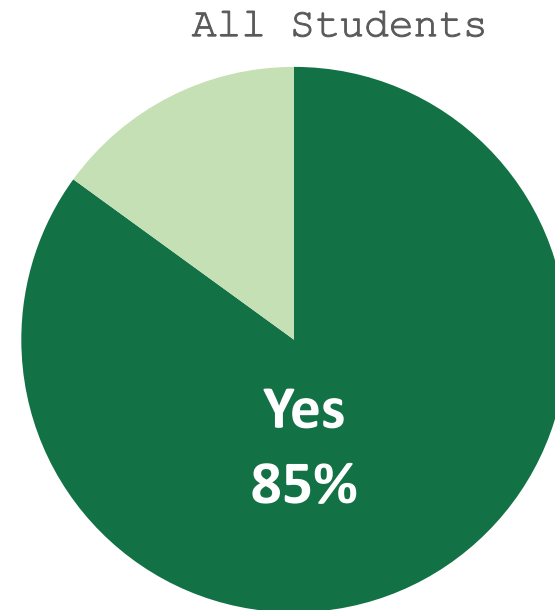
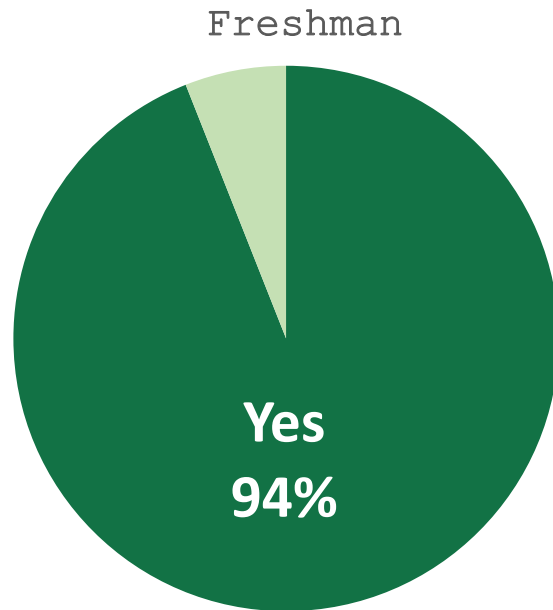
- Strong survey participation and engagement

Comparison of Survey Respondents to EMU Demographics



Student Survey Analysis

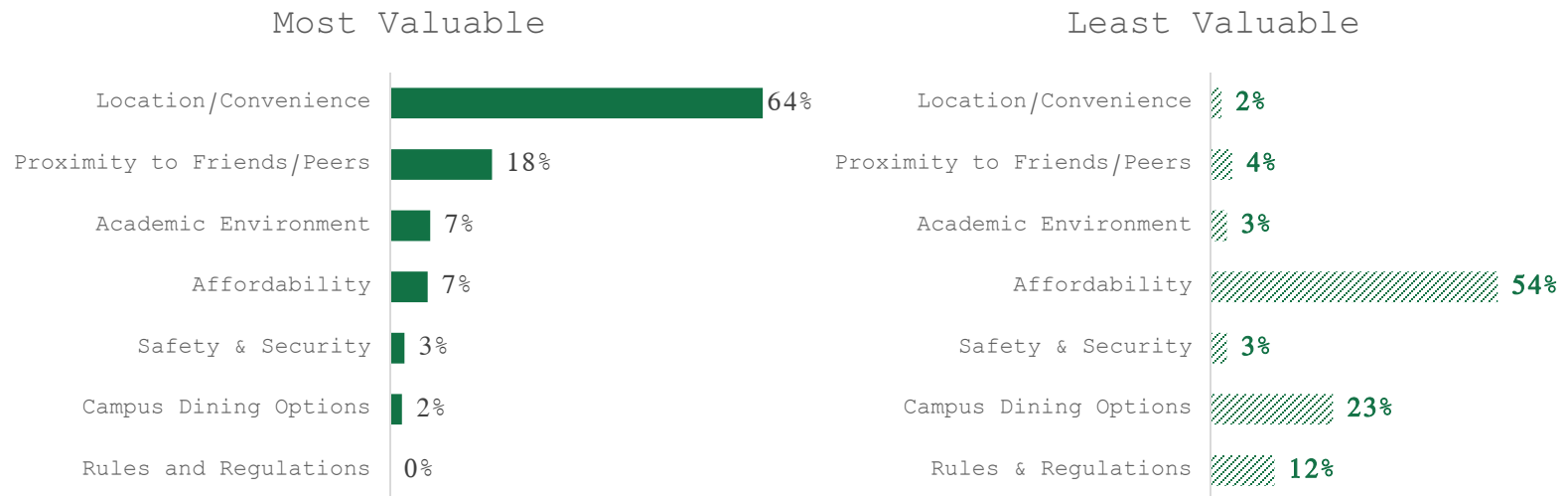
Has living on campus had a positive impact on your overall experience at EMU?



- 85% of students who have lived on campus felt that it had a positive impact on them

Student Survey Analysis

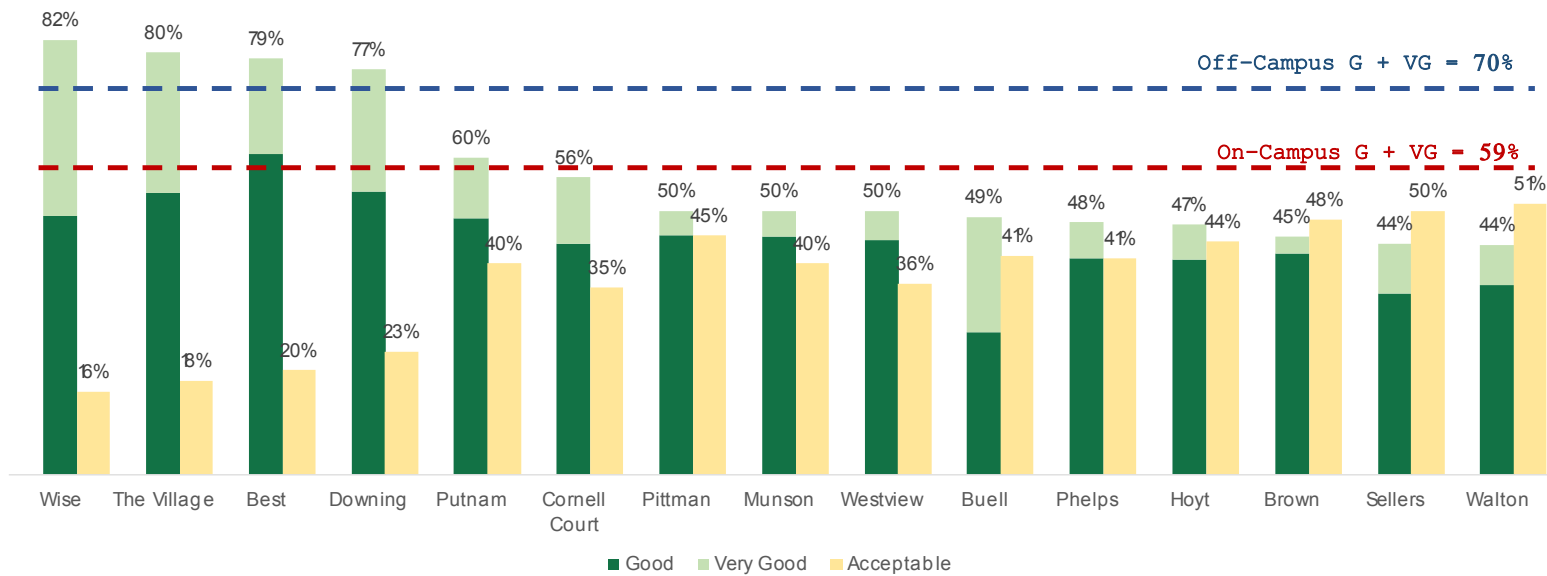
What do you find to be the MOST/LEAST valuable aspect to living on campus?



- Location/Convenience is the most common theme
- Other responses included dissatisfaction with parking and Wi-Fi

Student Survey Analysis

How would you rate your current living conditions?



- On average, off-campus housing is rated higher (70%) than on-campus (59%)
- Wise (renovation), Village (new + apartment-style), and Best / Downing (Honors halls)

Student Survey Analysis

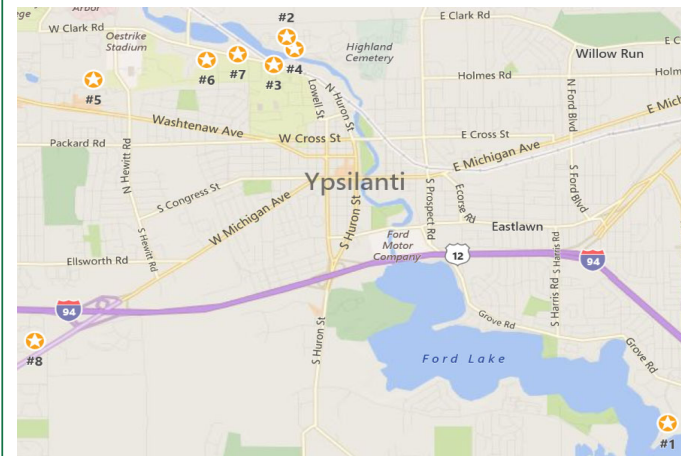
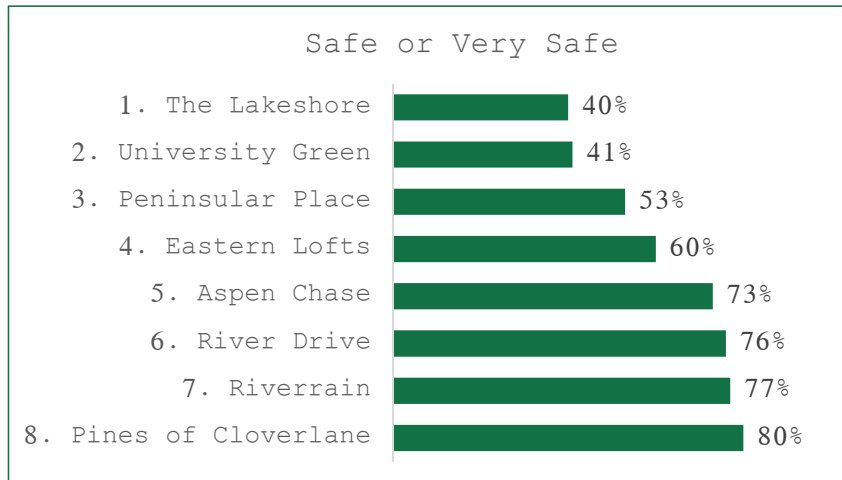
How safe do you feel on/off campus?

94%

feel safe or very safe on-campus

68%

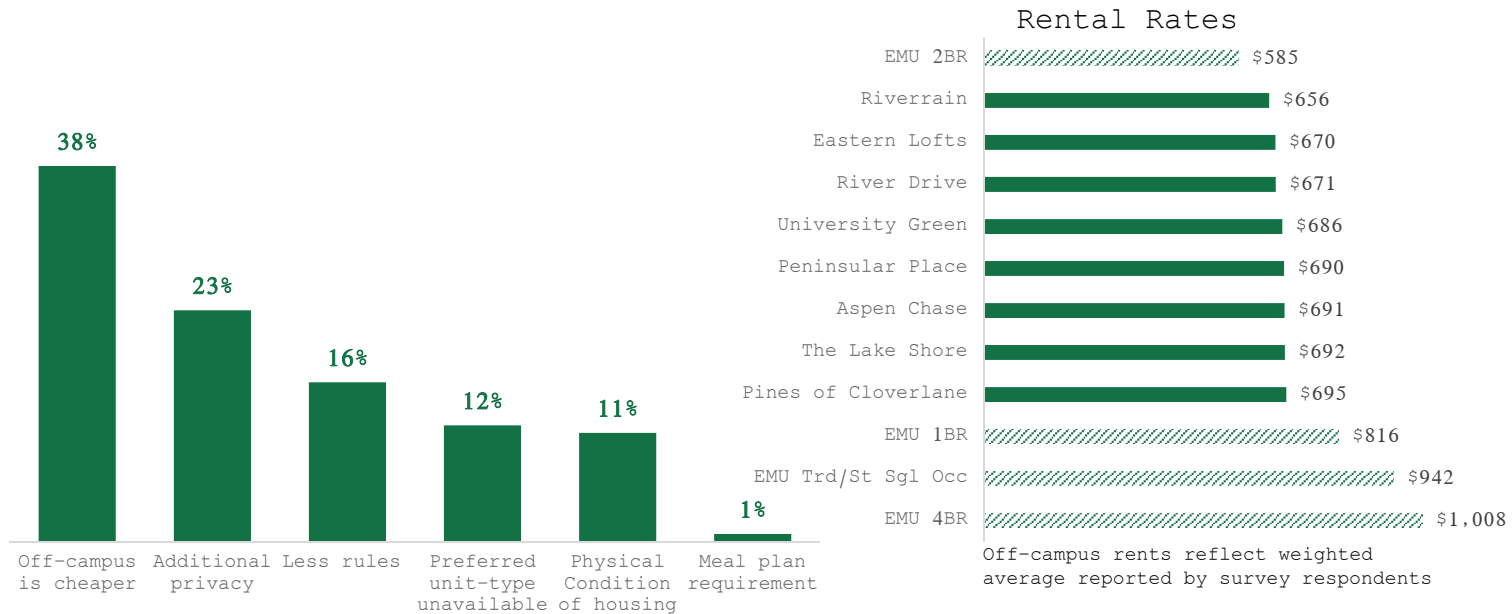
feel safe or very safe off-campus



- Leforge Road and Huron River area is a safety concern

Student Survey Analysis

If you live off campus or are considering moving off campus next academic year, please identify the reasons why?



- Need to help define the value proposition (cost / value) for students
- Juniors and seniors are more space-conscious than freshman and sophomores

Focus Group Feedback

Feedback Directly from Students

- What made you choose to attend

EMU?

- Convenience/close to home
- Affordability
- Sense of community
- Diversity
- Academic programs (i.e. business)

- What do you like most about on-campus housing?

- Convenience / location
- Sense of community

- Affordability and privacy - drivers to move off campus

23

total student participants

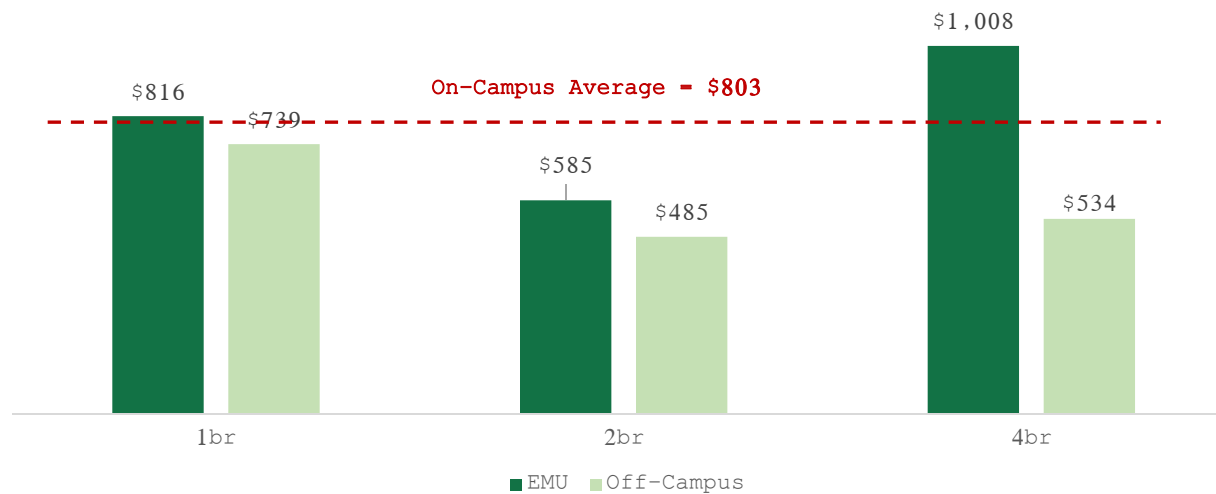
- What would you most like to improve about on-campus housing?

- Air conditioning
- More privacy (occupancy and bathrooms)

Competition Assessment

Off-campus Marketplace

Apartment Rental Rates



- High overall occupancy (98%+) likely due to affordable rental rates
- Only one purpose-built student housing community (Peninsular Place)
- Safety and security concerns in some areas around campus

Competition Assessment

Peer Institutions - Housing Program

Institution	% Trad	% Suite	% Apt	Live On Req	Hsg Capture Rates	
					% FTDS	So/Jr/Sr
1 Michigan State University	43%	55%	2%	2*	95%	25%
2 Oakland University	28%	56%	16%	0	41%	11%
3 Western Michigan University	52%	32%	16%	1	88%	22%
4 Central Michigan University	1%	88%	11%	2	96%	25%
5 Wayne State University	2%	48%	51%	0	39%	8%
6 University of Toledo	49%	51%	0%	2	57%	12%
7 Grand Valley State University	21%	31%	48%	0	87%	13%
8 Saginaw Valley State University	0%	54%	46%	0	71%	23%
9 Average	24%	52%	24%		72%	17%
10 Eastern Michigan University	7%	77%	16%	1	63%	13%

- Limited number of traditional-style rooms is beneficial, but lack of apartment-style rooms is likely driving down capture rates for So/Jr/Sr students
- Low first-time degree-seeking capture rate (FTDS) results in excess supply of suite-style units that may be undesirable to So/Jr/Sr students

Increasingly Competitive Marketplace



- 1855 Place - Opened in 2017, mix of apartments and townhouses, 420 units, \$157M
- Includes on-site fitness center, greenspace, and community service center



- Hillcrest Hall - Opened in 2018, 750 apartment-style beds, \$78M
- 400 seat dining center, 100 seat micro-rest. & C-store, fitness center, 200 seat MP room



- Planning large scale redevelopment of South Neighborhood through 2023 (P3 in 2019)
- Includes new residence halls in 2020, student center and dining facilities in 2022/23



- 450+ new suite-style beds in south campus area, delivery TBD (design completed)
- \$650M+ housing, dining, recreation master plan created in 2016



- 842 new apartment-style beds (440 opened in 2018, 402 in 2019) + retail space
- Renovation of existing apartment-style beds into 362 suite-style beds (opening 2021)



- Holton-Hooker Living Learning Center - opened in fall 2016, 498 pod-style beds, \$37M
- Classroom space, campus lounge, Einstein's Bros. Bagels

Demand Analysis

Target Markets for On-campus Housing

	Target Market #1	Target Market #2	Target Market #3
Full-time Student	✓	✓	✓
Living On-campus	✓		
Living Off-campus		✓	✓
Age 18 - 24		✓	✓
Age 25 - 29			✓
Undergraduate	✓	✓	
Graduate	✓		✓
Paying \$550+/month in Rent		✓	✓

Demand Analysis

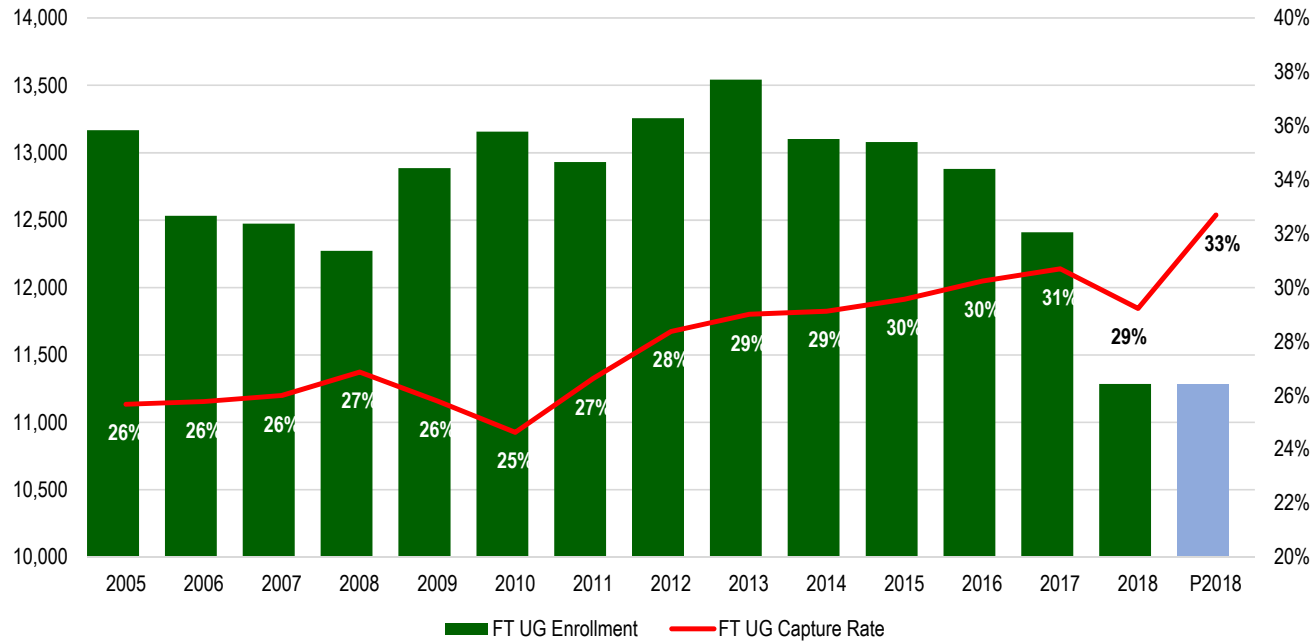
Overall Demand

- FTIC can live in any on-campus unit configuration except full-suite and apartment-style

	Bed Demand (Fall 2018) - New Policy (No FR in Full-Suites)				
	Community	Semi-Suite	Full-Suite	Apartment	Total
First-time in College (FTIC)	463	977	0	0	1,440
Continuing Freshman	0	0	30	104	133
Sophomore	54	129	252	400	836
Junior	16	55	75	380	526
Senior	6	38	89	495	627
Graduate / Professional	1	2	11	79	94
Transfer	0	57	25	227	309
Part-time	3	11	19	67	100
TOTAL:	544	1,268	501	1,751	4,065
	13%	31%	12%	43%	
Existing EMU Supply	313	2,312	577	1,040	4,242
Surplus / (Deficit)	(231)	1,044	76	(711)	177

Demand Analysis

Historical Enrollment & Capture Rates



- Potential demand exists to increase capture rate from 29% of FT UG students to 33% with the correct bed mix across the residential housing program

Demand Analysis

Aligning the System with Student Demand

- Significant investment in on-campus residential facilities is required

$$\text{\$215M} + \text{\$40M} = \text{\$255M}$$

renovation \$ (excl Westview)

potential new construction \$

capital investment (2018 \$)

- Considerations
 - Balancing institutional priorities (housing / student life / academic)
 - Execution and funding timeline
 - Cost of new construction (and type of new construction) vs. renovation

Discussion & Next Steps

Student Housing Market Study + Housing Master Plan

- Considerations
 - Towers - renovate & re-configure vs. demolition?
 - New apartment housing - Westview site vs. main campus?
 - Order of renovations vs. needed investment vs. efficiencies?
- Next Steps
 - Doc + data review (capture rates + enrollment projections, def. maint. + reno \$)
 - Implementation & phasing recommendations
 - Housing Master Plan Refinement
 - Report Documentation