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GEORGETOWN UNIVERSITY ("GU") 2011 MASTER PLAN

Neighborhood Impacts from Increased Enrollment in the Graduate School and School of Continuing Studies

June 14, 2011 Supplement Relating to Foxhall¹

Summary of Findings as of Fall 2010²

1. **Only 2.2% of students enrolled in the Graduate School ("GS") and School of Continuing Studies ("SCS"), or 128 GS and SCS students, resided in Foxhall.** These GS and SCS students represented 36.9% of all Georgetown students residing in Foxhall and 4.8% of the population of Foxhall.
2. **The proposed enrollment growth in the GS program over the next decade will have a very limited impact on Foxhall.** We project that between 2011 and 2020, GU's proposed enrollment growth would result in 26 additional GS students living in Foxhall (19 single-student graduate student residents and seven students that would occupy two to three non-single graduate student residences).
3. **Since Fall 1999, the percentage of GS and SCS students that live in Foxhall has decreased as a percentage of total enrollment.** GS and SCS students living in Foxhall as an overall percentage of total GS and SCS enrollment decreased from 3.8% in Fall 1999 to 2.2% in Fall 2010.
4. **GS and SCS students have a strong preference for living independently of other GU students.** Approximately 74.7% of the 99 GS and SCS graduate student residences in Foxhall have only one GS or SCS occupant; 43.4% of these students live in a conventional apartment / condominium buildings.
5. **Very few GS and SCS graduate students live in group homes.** GS and SCS graduate students lived in only six predominantly graduate group homes (that is, homes occupied by three or more GS or SCS students) in Foxhall in Fall 2010, representing less than 1.0% of Foxhall's total housing inventory. In eight additional group homes, one or two GS or SCS students lived with predominantly GU medical students. In total, there were 32 GS and SCS students that occupied 14 group homes, equating to an average occupancy of 2.3 GS and SCS students per graduate group home.

¹ For the purposes of this report, "Foxhall" means the geographic boundaries of the Foxhall Community Citizens Association (the "FCCA"). Article I of the FCCA Bylaws sets its geographic boundaries as the "rectangular area bounded by Glover-Archbold Park on the east and north, ending at Whitehaven Parkway, and south and west from Whitehaven Parkway to Canal Road returning east to Glover-Archbold Park. The area shall include the residents of East Palisades, Canal View, Colony Hill, Senate Heights, Dumbarton, Foxhall Village, Charleston Terrace, Indian Rock Terrace, and Georgetown Reservoir." GU defines "Foxhall" similarly for purposes of its own data collection.

² Fall 2010 data represents graduate student enrollment for the Fall 2010 semester.

6. **GS and SCS students lived in a small percentage of Foxhall's housing inventory.** GS and SCS graduate student residences accounted for approximately 7.4 % of Foxhall's total housing inventory (5.8% of Foxhall's non-apartment housing inventory and 10.0% of Foxhall's apartment housing inventory).³
7. **83.7% of the 381 residences in Foxhall Village were owner-occupied (per the District's tax assessment database compared to 44.0% in the District per Claritas U.S. Census data).** The majority of student group homes with GS and SCS occupants (78.6%, or 11 of 14) in Foxhall are in Foxhall Village.
8. **Home values have increased more in Foxhall Village over the past decade than in the District as a whole (99.6% in Foxhall Village versus 90.9% in the District).**

Background and Methodology

In response to inquiries from representatives of the FCCA, GU asked us to provide responses to the questions set forth below. We responded to similar questions relating to Burleith and West Georgetown in our report dated March 31, 2011.

Neighborhood dynamics in Foxhall are different than in Burleith and West Georgetown. Unlike Burleith and West Georgetown, which are more or less comprised of one neighborhood each, Foxhall, as defined by the FCCA, is a combination of more differentiated and discrete neighborhoods, including Foxhall Village, Georgetown Reservoir, Colony Hill, Canal View and Senate Heights. Apartment occupancy of GS students is focused along MacArthur Boulevard; the majority of group homes with GS students are located within Foxhall Village.

The Foxhall neighborhood, in contrast to Burleith and, to a lesser extent, West Georgetown, has a significant number of conventional apartment buildings. Compared with Burleith, Foxhall has fewer graduate students as a proportion of the overall background population and fewer graduate group homes as a proportion of Foxhall's total number of housing units. Foxhall has stronger supply constraints than Burleith: Foxhall has a high percentage of owner-occupied single-family homes (that are generally more expensive than homes in Burleith) and fewer pre-existing rentals than in Burleith.

Looking ahead, the existing apartment offerings in Foxhall should be able to continue to accommodate GS housing demand for year-round, single graduate student occupancy (including graduate students living with non-students), especially given that graduate student demand in Foxhall is so heavily skewed towards non-group home occupancy.

³ Percentages are based on 1,341 households in Foxhall according to data from the Claritas census database. 909 of these households are one to four unit structures, and 432 are in apartment buildings with five or more units.

GU provided us with data on GS and SCS student enrollment and comparative graduate student housing locations for Fall 1999 and Fall 2010. We also obtained the following additional information:

1. **Demographics:** We used Claritas, a national U.S. Census-based data source, to retrieve 2010 demographic data for Foxhall. In addition, we also used supplemental resources from the U.S. Census Bureau (including mid-census American Community Surveys), published demographics from the DC Economic Partnership and other local market resources. We obtained similar 2010 data relating to the District of Columbia as a whole from the same sources.
2. **Home Values:** We compiled home sales data for Foxhall Village (a distinct neighborhood of 381 homes within Foxhall) for the period between 1999 and 2010, primarily using the District of Columbia Office of Tax and Revenue Sales Database.

A. Graduate School and School of Continuing Studies Students in Foxhall as of Fall 2010

1. How many GS and SCS graduate students lived in Foxhall as of Fall 2010?

Approximately 2.7% of GS students, or 119 students, and 0.7% of SCS students, or 9 students, lived in Foxhall. The 2010 population of Foxhall was 2,661, so GS and SCS students accounted for 4.8% of the people living in Foxhall as of Fall 2010.

Table 1
GS and SCS Students Residing in Foxhall Fall 2010

<i>School of Study</i>	<i>Living in Foxhall</i>		<i>Total Enrollment</i>
	<i>#</i>	<i>% of School</i>	<i>#</i>
GS	119	2.7%	4,485
SCS	9	0.7%	1,347
<i>Total</i>	<i>128</i>	<i>2.2%</i>	<i>5,832</i>

Source: Georgetown University and Bolan Smart, 6/2011

2. How many residences in Foxhall were occupied by GS and SCS students?

Table 2 shows the number of residences (by school) occupied by the GS and SCS student population in Foxhall. Registered GS and SCS students lived in 99 residences in Foxhall, of which 43, or 43.4%, were conventional apartments / condominiums in multi-unit buildings, and 56, or 56.6%, were either single-family residences or basement apartments in single-family residences. Only six residences were predominantly graduate group homes (that is, were occupied by three or more GS or SCS students). There were also eight group homes occupied by predominantly GU medical students with one or two GS or SCS student occupants. GS and SCS students, in the aggregate, lived in 7.4% (based on 1,341 households per Claritas) to 11.0% (per FCCA's 900+ households) of the housing inventory in Foxhall.

Table 2
GS and SCS Student Residence Distribution Fall 2010

<i>School of Study</i>	<i>Foxhall</i>	
	<i>Residences</i>	<i>% of Total</i>
GS	91	91.9%
SCS	8*	8.1%
<i>Total:</i>	<i>99</i>	<i>100%</i>

* One home with 3 GS students and 1 SCS student is counted as a GS residence.

Source: Georgetown University and Bolan Smart, 6/2011

3. What is the average number of GS and SCS students per graduate residence in Foxhall?

Table 3 illustrates that the number of graduate students per graduate residence in Foxhall is 1.31 for GS students and 1.13 for SCS students. A total of 32 GS and SCS students lived in 14 group homes, which equates to an average occupancy of 2.3 graduate students per group home.

Table 3
Average GS and SCS Occupancy per Graduate Residence Fall 2010

<i>School of Study</i>	<i>Foxhall</i>
GS	1.31
SCS	1.13

Source: Georgetown University and Bolan Smart, 6/2011

4. What is the breakdown of GS and SCS students living with other GU students in Foxhall?

The vast majority of GS and SCS students (72.5% and 88.9%, respectively) living in Foxhall did not live with any other GS or SCS students.

Table 4
Graduate Student Residency Composition by School in Foxhall Fall 2010

<i>School of Study & Residency Composition</i>	<i>Residences</i>	<i>% of Total</i>	<i>Grads per Grad Residence</i>	<i>Avg Residency Size</i>
Graduate School				
1 GS Student	66	72.5%	1.0	1.0+
1 GS Student w/ 2+ SOM*	5	5.5%	1.0	3.0+
2 GS Students	11	12.1%	2.0	2.0
2 GS Students w/ 2+ SOM	3	3.3%	2.0	4.0+
3 GS Students	3	3.3%	3.0	3.0
3 GS Students with 1 SCS Student	1	1.1%	4.0	4.0
4 GS Students	2	2.2%	4.0	4.0
<i>Total:</i>	<i>91</i>	<i>100.0%</i>		
School of Continuing Studies				
1 SCS Student	8	88.9%	1.0	1.0+
1 SCS Student with 3 GS Students	1	11.1%	4.0	4.0
<i>Total:</i>	<i>9</i>	<i>100.0%</i>		

* "SOM" means the GU School of Medicine.

Source: Georgetown University and Bolan Smart, 6/2011

B. GS and SCS Student Trends for the Period from Fall 1999 to Fall 2010

5. Did the GS and SCS student population in Foxhall increase from Fall 1999 to Fall 2010?

The combined GS and SCS student population in Foxhall increased by 21 students during the relevant period (from 107 students in Fall 1999 to 128 students in Fall 2010). The increase equates to the addition of less than two graduate students each year.

Table 5
GS and SCS Student Population in Foxhall Fall 1999 to Fall 2010

<i>School of Study</i>	<i>Foxhall</i>		
	<i>1999</i>	<i>2010</i>	<i>11-Year Change</i>
GS	102	119	16.7%
SCS	5	9	80.0%
<i>Total:</i>	<i>107</i>	<i>128</i>	<i>19.6%</i>

Source: Georgetown University and Bolan Smart, 6/2011

6. Has the increase in GS and SCS enrollment since Fall 1999 affected the number of these students living in Foxhall?

Enrollment in GS and SCS roughly doubled between Fall 1999 and Fall 2010; during that same period, there was only a 19.6% increase in GS and SCS students living in Foxhall. GS and SCS students residing in Foxhall as an overall percentage of total enrollment decreased from 3.8% in 1999 to 2.2% as of 2010.

C. Impact of Proposed Graduate School Enrollment Increase on Foxhall

7. Based on the proposed increase in Graduate School enrollment, what increase in the number of GS students and graduate residences in Foxhall do you project?

Proposed Graduate Student Enrollment Increase – GU has proposed an enrollment increase of 967 GS students on the main campus between 2011 and 2020. For purposes of this analysis, we have assumed that all additional students on the main campus in this period will either be students in the Graduate School or will behave similarly to students in the Graduate School in terms of their housing preferences.

Historical Trend Analysis – From Fall 1999 to Fall 2010, the number of GS students in Foxhall increased by 17 students (from 102 to 119). During that same period, the number of graduate residences increased by 12 (from 79 to 91). Based on GU's proposed enrollment increase, we project that the number of GS students in Foxhall would increase by 26 (to 145 students) and that two to three non-single graduate student residences would be added in Foxhall between 2011 and 2020.

Projected Increase in Student Population – Tables 6 and 7 show the projected number of additional students and the types of residences in which they would live between 2011 and 2020. Based on historical data, we project that 26 additional GS students would be added to Foxhall. This increase of 26 students in Foxhall represents an increase of 2.6 GS students per year through 2020.

**Table 6
Projected Additional GS Students through 2020**

<i>School of Study</i>	<i>Fall 2010</i>			<i>Fall 2020</i>	
	<i>Student Enrollment</i>	<i>Students Living in Foxhall</i>	<i>% Students Living in Foxhall</i>	<i>Proposed Enrollment Increase</i>	<i>Additional Students in Foxhall</i>
GS	4,485	119	2.7%	967	26

Source: Georgetown University and Bolan Smart, 6/2011

Table 7
Projected GS Student Residency Composition in Foxhall through 2020

<i>School of Study & Residency Composition</i>	<i>Grad Residency Composition %</i>	<i>Additional Students</i>
Graduate School		
1 Graduate	72.5%	18.9
1 GS w/ 2+ SOM	5.5%	1.4
2 GS	12.1%	3.1
2 GS w/ 2+ SOM	3.3%	0.9
3+ GS	3.3%	0.9
3 GS w/ 1 SCS	1.1%	0.3
4 GS	2.2%	0.6
<i>Total:</i>	<i>100%</i>	<i>26.0</i>

Source: Georgetown University and Bolan Smart, 6/2011

As noted above, we estimate that 72.5% of the current GS student residences in Foxhall are occupied by a single graduate student; 48.5% of these students live in a conventional apartment / condominium in a multi-unit building. The vast majority of these students (19 students) will live in single-occupant housing. The remaining anticipated demand of seven students will likely occupy two to three additional group homes based on the 2010 data relating to existing graduate residency composition and the average graduate occupancy of 2.3 students per group residence.

D. Foxhall Neighborhood Characteristics

Demographics

8. What is the socioeconomic profile of Foxhall, and how has it changed over the last 10 years?

We used 2010 demographic data for Foxhall and the District of Columbia drawn from Claritas, a national demographic data source, as updated with mid-census American Community Surveys data, and as compared with published data from the U.S. Census Bureau. These data sources are in agreement in their depiction of Foxhall as a neighborhood of well-educated individuals and high home ownership rates, limited household turnover and high median household incomes.

Table 8
2000 and 2010 Demographic Highlights of Foxhall and the District of Columbia

<i>Indicator</i>	<i>Foxhall</i>		<i>District of Columbia</i>	
	<i>2000 Census</i>	<i>2010 Est</i>	<i>2000 Census</i>	<i>2010 Est</i>
Owner Occupied HH	55.4%	59.9%	40.8%	44.0%
Median HH Income	\$76,172	\$103,578	\$40,800	\$58,100
Pop 25+ with College Degree or Higher	86.4%	90.5%	39.1%	47.7%
Average Age	37.4	38.4	36.9	37.8
Age 21 to 34	37.6%	30.4%	24.9%	24.6%
Family HH With Children	16.3%	15.7%	19.8%	19.2%

Source: Claritas and Bolan Smart, 6/2011

The number of owner-occupied residences in Foxhall increased by a larger margin than District-wide between 2000 and 2010. During this same period, the 21-34 age group decreased, and both the 5-14 age group and the 55-64 groups increased, which resulted in an overall age increase of one year.

Housing Data

9. *How have property values in Foxhall Village changed over the last 10 years compared to property values for Washington, D.C.?*

In Foxhall Village, average home sale prices increased by 99.6% between 1999/2000 and 2010 from an average home sale price of \$416,800 (based on 18 sales) in 1999/2000 to \$831,955 (based on 22 sales) in 2010 (based primarily on the District of Columbia Office of Tax and Revenue Sales Database). In the District as a whole, average home sale prices increased by 90.9%, from an average home sale price of \$265,000 (based on 5,000+ sales) in 1999 to approximately \$505,900 (based on 6,500+ sales) in 2010.

10. *Is there an identifiable relationship between the presence of graduate student homes and property condition?*

Based on a neighborhood inspection of the physical condition of current graduate student group homes in Foxhall Village, there is not an identifiable relationship between the presence of graduate residences and property condition in Foxhall Village.

11. *What are other housing characteristics in Foxhall and Foxhall Village?*

We reviewed data relating to 381 residences in Foxhall Village (the area defined by the District as Foxhall in the District of Columbia's Tax Assessment Database). A survey of this data reflected that 319, or 83.7%, were owner-occupied residences. The remaining 62 residences, or 16.3%, are listed in the database as not being owner-occupied (and, therefore, presumably are rented). This representative sample comprises close to 28.4% to 42.3% of the households in the Foxhall area (depending on whether FCCA data of 900+ households or the Claritas database of 1,341 households is used). We note that data in the Claritas database reflects a 59.9% owner-occupancy rate in the Foxhall area, but this percentage includes the multi-unit apartment inventory.