THE JAIR LYNCH COMPANIES

REAL ESTATE DEVELOPMENT SERVICES

Eastgate Gardens/ Marshall Heights: Market Study



DCHA District of Columbia Housing Authority

MHCDO

Submitted to:

The District of Columbia Housing Authority

&

Eastgate/Marshall Heights Neighborhood Alliance



Submitted by:

The Jair Lynch Companies



September 13, 2002

ZONING COMMISSION
District of Columbia
Case 02-49
Exhibit 9

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THE JAIR LYNCH COMPANIES
REAL ESTATE DEVELOPMENT SERVICES

September 13, 2002

Ms. Jessica Franklin
Project Manager
Office of Planning & Development
DC Housing Authority
1133 North Capitol Street, NE, Suite 147
Washington, DC 20002-7599

Dear Ms. Franklin,

We are pleased to submit our final report documenting market potentials for the proposed Eastgate Gardens redevelopment. We have tested the market for multi-family, single-family, and senior housing in the Eastgate/Marshall Heights community.

Together with our existing conditions report, this document is intended to serve as a basis for the redevelopment master plan for the Eastgate Gardens site and its surrounding neighborhood.

Please contact me with any questions.

Sincerely,

Jonathan R. Weinstein
Senior Development Strategist & CFO

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EXECUTIVE SUMMARY

The District of Columbia Housing Authority (DCHA) has made a commitment to redevelop the Eastgate Gardens public housing development and to help revitalize the surrounding neighborhood. A series of community-based planning initiatives related to this effort have been completed over the past several years, leading to the demolition of most of the structures previously on the site. To facilitate continued community involvement in the planning process, the DCHA has joined with the community-based Eastgate/Marshall Heights Neighborhood Alliance (the "Alliance") to support the completion of a master plan for the site and surrounding neighborhood.

The Eastgate Gardens public housing site is located in the Marshall Heights community of Ward 7. Bounded by Benning Road, Fitch Street, 51st Street and F Street/Drake Place, the 20-acre site was once a 240-unit public housing development, but has been almost entirely vacant since demolition of 228 units in 1998. Twelve occupied units remain in the northwest corner of the site. The site itself is a rolling hillside that changes in grade by approximately 80 feet, rising from Benning Road and Fitch Street to the level of the rest of the neighborhood at its north and east ends.

The surrounding Marshall Heights neighborhood is characterized by its almost exclusively residential use. Single-family, detached housing and three- to four-story apartment buildings characterize most of the surrounding neighborhood, in particular the portion that sits on a rectangular grid, with several blocks almost exclusively home to small (four- to 19-units) apartment buildings. In the far northwest and northeast corners of the neighborhood, the area has a calmer, more suburban feel where the rectangular street grid ends and the roads wind slowly past single-family, attached and detached homes. Residential properties range in condition from good to poor, with several blocks dominated by vacant and abandoned properties that contribute to a blighted and distressed feel to much of the neighborhood.

In keeping with revitalization plans, this report analyzes the market feasibility of developing mixed-income multi-family and senior rental housing on-site, and single-family ownership units both on- and off-site.

Market Findings

The analysis of market demand for new housing in the Marshall Heights neighborhood has shown potential for all three types of housing analyzed – multi-family rental apartments and townhouses, for-sale single-family homes, and senior rental units. Ultimately, the mix of unit types will need to respond to community preferences and project financial and planning considerations. To be most competitive and to best serve the interests of the community, the project should be designed with moderate-to-low densities significantly below those of the former Eastgate Gardens.

Rental Housing

The variety of rental options in the target area and the low vacancy rates in most operating properties demonstrates the demand for rental housing in the target area. Although there has been no new development of rental housing, there have been recent renovations of properties that have successfully leased up. More renovations are planned. A survey of area apartment buildings indicates a proven market for two-bedroom units and an unmet need for units larger than a typical two-bedroom unit.

If the community determines that the Eastgate Gardens site should include rental housing, the unit mix should lean heavily toward three-bedroom units, with some large two-bedroom units also included. The rental housing should be designed to complement the single-family homes in scale; rental units should be in either townhouses or multi-unit "grand" houses that are closer in style to single-family homes than to the rectangular block buildings that currently house most of the neighborhood's rental units. Amenities in these units should include all kitchen appliances, a washer/dryer hookup, central air conditioning and heating.

Recommended Rental Housing Mix

Unit Type	Size	Rent	% of Units
2 BR (large)	850 sf	$750	20%
3 BR	950 sf	$850	80%

For-Sale, Single-Family Housing

The experience of recent new home developments in the Marshall Heights area suggests good market potential for three- and four-bedroom single-family houses priced between $130,000 and $170,000. Assuming it is consistent with community input and the final development plan, the Eastgate Gardens site could include approximately 120 single-family units. Units should average between 1,200 and 1,600 square feet, depending on the unit type. Design should include a mix of single-family attached and detached homes. All of the for-sale housing units should have a basement, central air conditioning and heat, all appliances, and security. Additional options should be made available to buyers.

Recommended For-Sale Housing Mix

Unit Type	Size	Sale Price	% of Units
3 BR/2.5 BA	1,200 sf	$130,000 - $170.000	80%
4 BR/2.5 BA	1,600 sf	$130,000 - $170.000	20%

Senior Housing

Given the lack of senior housing options in the Marshall Heights community, the Eastgate Gardens site could – if supported by the community and the final development plan – accommodate a development of approximately 100 senior housing units, particularly if all of these units are to be part of the public housing system. Any senior housing developed on-site should be an independent (not assisted) living facility, but it should also provide and facilitate access to the facility by outside service providers. The senior housing should include a community room and laundry facilities, and each unit should have its own kitchen.

Recommended Senior Housing Mix		
Unit Type	**Size**	**% of Units**
1 BR/1 BA	600 sf	85%
2 BR/1 BA	750 sf	15%

I. INTRODUCTION

Purpose of this Report

The District of Columbia Housing Authority (DCHA) has made a commitment to redevelop the Eastgate Gardens public housing development and to help revitalize the surrounding neighborhood. A series of community-based planning initiatives related to this effort have been completed over the past several years, leading to the demolition of most of the structures previously on the site. To facilitate continued community involvement in the planning process, the DCHA has joined with the community-based Eastgate/Marshall Heights Neighborhood Alliance (the "Alliance") to support the completion of a master plan for the site and surrounding neighborhood.

Prior plans have shared a common desire to see the Eastgate Gardens site redeveloped with a lower density of housing that will serve a mixed-income target market. Similar low-density, affordable housing is desired as part of an infill development plan for the surrounding community. The emphasis of these plans has been on increasing homeownership opportunities in the area.

This report analyzes the market feasibility of developing on-site multi-family and senior rental housing, and both on- and off-site single-family ownership units. For each planned product type, this report provides recommendations for density, targeted price points, target market segments, and estimated absorption.

Research for this report includes analysis of published and unpublished Census data, interviews with key informants, documentation of market comparables, and analysis of general market trends and conditions.

Report Organization

Following this introduction, Section II of this report provides an overview of the proposed Eastgate Gardens revitalization plan. Section III describes the economic and demographic characteristics of the Marshall Heights neighborhood and compares this data to that of Ward 7 and the District of Columbia as a whole. Subsequent sections provide market overviews for multi-family rental (Section IV), single-family for-sale (Section V), and senior rental housing (Section VI). These overviews include an analysis of market demand, existing and planned supply, and a summary of unmet demand for each category. The final section of this report, Section VII, summarizes conclusions of the market analyses and provides recommendations for future development.

II. DESCRIPTION OF PROJECT

Project Site and Surrounding Neighborhood

The Eastgate Gardens public housing site is located in the Marshall Heights community of Ward 7. Bounded by Benning Road, Fitch Street, 51st Street and F Street/Drake Place, the 20-acre site was once a 240-unit public housing development, but has been almost entirely vacant since demolition of 228 units in 1998. Twelve occupied units remain in the northwest corner of the site. The site itself is a rolling hillside that changes in grade by approximately 80 feet, rising from Benning Road and Fitch Street to the level of the rest of the neighborhood at its north and east ends.

The surrounding Marshall Heights neighborhood is characterized by its almost exclusively residential use. Single-family, detached housing and three- to four-story apartment buildings characterize most of the surrounding neighborhood, in particular the portion that sits on a rectangular grid, with several blocks almost exclusively home to small (four- to 19-units) apartment buildings. In the far northwest and northeast corners of the neighborhood, the area has a calmer, more suburban feel where the rectangular street grid ends and the roads wind slowly past single-family, attached and detached homes.

Residential properties range in condition from good to poor, with several blocks dominated by vacant and abandoned properties that contribute to a blighted and distressed feel to much of the neighborhood.

The community is home to 29 religious congregations, generally located within the residential fabric of the neighborhood. The largest parcels in the neighborhood (not including Eastgate Gardens) belong to the three public schools located in the community. These include the Fletcher-Johnson Middle School, the J.C. Nalle Elementary School, and C.W. Harris Elementary School.

Small retail strip centers are located along the boundaries of the community, providing a limited range of goods and services. The centers are located on small parcels (less than one acre) and are generally in blighted condition, with the exception of the BENCO shopping center at East Capitol Street and Benning Road.

Recent Development Efforts

Several development projects, public and private, are currently underway in the area surrounding the Eastgate Gardens property and target area. These projects include both residential and retail developments.

The Marshall Heights Community Development Organization (MHCDO) is actively involved in the community, with specific initiatives related to the Eastgate Gardens redevelopment project including a residential façade improvement program and an infill/scattered site housing development program. Along the boundaries of the Eastgate Gardens site are several ongoing revitalization initiatives by private property owners. These include the newly renovated ***Vision Condominiums*** in the 5100 block of F Street, the ***Benning Park Terrace Apartments*** south of the Eastgate Gardens site, and several infill/scattered site housing projects.

Directly adjacent to the Marshall Heights community, a comprehensive neighborhood revitalization initiative is underway as part of the ***East Capitol HOPE VI*** project. This project includes new, mixed-income housing, a retail center anchored by a new supermarket and office space. The ***BENCO shopping center*** at the intersection of Benning Road and East Capitol has been undergoing a revitalization under new owner Urban America, a national retail developer focused on urban centers. BENCO is the largest concentration of retail along the boundaries of the Marshall Heights target area.

The DC Office of Planning (DCOP) has been advocating a transit-oriented development plan for revitalizing areas of the city served by Metro. The Benning Road Metro station is not, however, on the priority list of properties being marketed for development by the Washington Metropolitan Area Transit Authority (WMATA). The DC Department of Parks and Recreation (DPR) is in the process of developing a strategic master plan that will address the changing needs of the communities it serves and the appropriate facilities modernization efforts to best meet those needs.

III. DEMOGRAPHIC TRENDS AND CONDITIONS

An understanding of the demographic and related economic characteristics of the Eastgate Gardens target area (the Marshall Heights neighborhood), Ward 7 and the District of Columbia is crucial to formulating conclusions regarding the demand for housing and other development in the proposed project area. Data analyzed below are from the 2000 Census, with updates from Claritas, Inc., a private national demographic data source. Data tables outlining the information referred to in this report are included in Appendix A.

Definition of Study Areas

This section of the report analyzes data for three overlapping geographic areas. Population characteristics for the Marshall Heights neighborhood and surrounding area are presented first, to gain an understanding of the existing resident population. The area for which data are provided is comprised of three Census Tracts that closely match the boundaries of the proposed target area. Given the location and size of the Eastgate Gardens property, a separate analysis of the Census Tract in which the site is located would not provide a relevant a picture of the area distinct from the larger Marshall Heights neighborhood.

Data are also presented for Ward 7 as a whole and for the District of Columbia, because demand for new housing will draw upon a citywide population as well as from the adjacent Maryland suburbs. Particular emphasis is given to households which fall within the target income range of potential residents for new housing at the primary Eastgate Gardens development site.

Overview of the Regional Development Trends

Recent years have seen a tight housing market throughout the national capital area, with new development and gentrification pressures impacting previously underserved, low-income neighborhoods throughout the District of Columbia. This trend has not yet reached as significant a level in Wards 7 and 8 as in other areas of the city. Ward 7 has seen, however, new construction of housing in recent years, including the type of single-family detached units that are targeted at the higher income groups (though still moderate income households) that can gentrify a neighborhood.

While in other areas of the city this process of changing the demographics of the neighborhoods has been seen by some residents and others as having a negative impact on the existing population, in the targeted Marshall Heights community, residents appear to welcome the new development. This is perhaps due to the readily available open tracts of land (like the former Eastgate Gardens site) and high concentration of vacant and abandoned housing.

Commercial development is also being eagerly pursued by city agencies and neighborhood residents striving to provide communities with the retail and service offerings they desire. Increasingly, traditional suburban retailers are considering locating in District neighborhoods. As residential development in many neighborhoods has attracted new residents (renters and home owners), area median incomes have increased and retailers have been more willing to confront their concerns about opening inner-city stores and have sought to meet the new demand.

Demographic Trends

Population Growth. Marshall Heights has been declining in population and number of households over the past decade (see Table 1 in Appendix A). Fewer than 6,000 people lived in just under 2,500 households in 2001, down from approximately 8,500 people in 3,300 households in 1990. From 1990 to 2001 the population decline has averaged more than three percent per year and the number of households has declined by an average of just over 2.5 percent per year.

These rates exceed the declining population and number of households rates for Ward 7 over the same period. Ward 7's population declined from approximately 79,700 in 1990 to 70,700 in 2001 (an average annual decline of 1.1 percent). The number of households declined from less than 32,000 to approximately 30,000 (an average annual decline of less than one percent).

The District of Columbia as a whole experienced a less pronounced decrease in population and a slight increase in the number of households over the same period. The city's population has declined from nearly 607,000 to just over 572,000 (an average annual decline of less than one percent). Population figures for the District reflect a decrease over the first half of the 1990s, with the overall decline offset by a slight increase in recent years. The number of households in the District increased slightly, from 250,000 in 1990, to 252,000 in 2001, an average annual increase of only 0.1 percent.

This population decline in Marshall Heights, and in Ward 7 as a whole, suggests the need to develop housing as part of a comprehensive strategy to attract new residents.

Household Size and Type. In 2001, Marshall Heights' percentage of family households (62.4 percent) and average household size (2.56) were consistent with those for Ward 7 as a whole (62.6 percent and 2.49, respectively). Compared to the District, however, Marshall Heights and Ward 7 have a significantly higher proportion of family households. The District, with its many students, singles, one-bedroom and studio apartments and unrelated group rentals of larger homes, had fewer than 50 percent family households (49 percent in 1990 and only 47 percent in 2001).

The average household size was also lower for the District as a whole (2.26 in 1990 and 2.12 in 2002). The average household size in Marshall Heights, Ward 7 and the District of Columbia as a whole all declined by an average of 0.5 percent per year between 1990 and 2001.

The high percentage of family households in Marshall Heights reflects the area's character as a residential, settled community.

Senior Head of Household Type. In 1990, 716 of 3,303 households in Marshall Heights (or 21.7 percent of households) were headed by a senior (aged 65 and over). Of these households, approximately one quarter (24.9 percent) were seniors living alone. Most of the remaining seniors headed households in which they lived with their families (72.1 percent). Throughout Ward 7 a higher percentage of senior heads of household lived alone (35.1 percent) and a lower percentage lived with their families (59.3 percent). District-wide, 36.3 percent of senior heads of household lived alone and only 51.7 percent lived in families. Another significant fact gleaned from the 1990 Census is that none of the senior heads of household in Marshall Heights lived in group quarters, compared to 2.6 percent of such households throughout Ward 7 and 7.8 percent District-wide.

Based on data from Table 12, in 2001 there were 412 senior heads of household in Marshall Heights. By applying the percentages from 1990 (see Table 13) to the overall number of senior households in 2001, it

can be deduced that there were approximately 103 seniors living alone and another 297 heading their family households.

The lack of any senior housing facility Marshall Heights (in 1990) and the significant number of seniors living alone suggests that there is a ready market for a senior housing facility.

Tenure. A significantly higher percentage of Marshall Heights residents rent their homes (78 percent in 1990) compared to Ward 7 and the District of Columbia (both 61 percent in 1990).

The high percentage of rentals, when considered in conjunction with the high percentage of family households, suggests a need for homeownership opportunities for area families – which may need to be made affordable for the lower-income households most common in the Marshall Heights. This also suggests that a new development at Eastgate Gardens that leaned heavily toward ownership housing would have a positive impact on the overall diversity of neighborhood housing opportunities.

Age Distribution. Based on 2001 figures, there is a higher concentration of children in Marshall Heights (32 percent of the population under age 20) than in Ward 7 (29 percent) or the District as a whole (24 percent). As a result, the median age in the Eastgate area is 33.8 years, compared to 36.3 years for Ward 7 and 37.5 year for the District (see Table 2). Another contributor to Marshall Heights' low median age is the relatively low percentage of senior citizens. Only 9.4 percent of Marshall Heights residents are age 65 or older, compared to nearly 13 percent of the population in both Ward 7 and the District.

The high concentration of children in Marshall Heights is consistent with the high percentage of family households. This suggests that in addition to providing homeownership opportunities for area families, development of ownership housing could also be targeted toward households without children – without significantly disrupting the family feel of the community.

Household Incomes. Table 3 shows that the median household income in Marshall Heights ($34,733 in 2001), is lower than that of both Ward 7 ($38,185) and the District as a whole ($46,968). This difference is clearest when considering the much smaller proportion of households in Marshall Heights with incomes at the upper end of the economic spectrum. Only 9.2 percent of Marshall Heights households have annual incomes greater than $75,000, compared to the District-wide proportion of 29.7 percent. In Ward 7, 17.4 percent of households have annual incomes greater than $75,000.

Another way to look at Marshall Heights is to consider that approximately 70 percent of its households have incomes below the District's median household income.

The current population of Marshall Heights (generally speaking) does not have sufficient household income to purchase or rent market rate housing. Some of the new development, if it is to be made available to current residents, will need to be subsidized to be made more affordable. Some of this subsidy could come from higher income households attracted to the new development.

Senior Householder Incomes. Table 12 shows that among senior heads of household, a significant proportion in each study area have household incomes below $15,000 per year (28.9 percent of Marshall Heights senior households, 29.9 percent of Ward 7 senior households, and 27.4 percent of senior households District-wide). At the other end of the income spectrum, Marshall Heights has very few senior heads of households with household incomes greater than $75,000 (only 3.2 percent of senior households, compared to 13.6 percent of such households in Ward 7 and 22.3 percent District-wide).

Generally speaking, senior heads of households currently living in Marshall Heights, are living in families (or alone) with household incomes at the lower end of the economic spectrum. Some senior householders may own their homes, whose sale could be a source of initial revenue to meet their housing needs. Development of a new senior housing community on the Eastgate site would need to target lower-income households.

Educational Attainment. The overall education level of Marshall Heights' population and Ward 7 is lower than that of the District's population as a whole. The largest discrepancy is in the portion of the population that has attended college (see Table 4). Only 23.2 percent of Marshall Heights' population – less than one in four people aged 25 years and older – had attended any college at all (according to the 1990 Census). By comparison, 33.8 percent of the comparably aged Ward 7 population and 51.9 percent of all District residents aged 25 and older have attended college. Similarly, a much higher proportion of the Marshall Heights community did not graduate from high school (40.1 percent, versus 35.3 percent in Ward 7 and 26.9 percent throughout the District).

Occupation of Employed Residents. Table 5 illustrates the occupations of the employed population (over the age of 16) in each geographic area in 1990. Marshall Heights had a lower percentage of its employed residents working in a managerial and professional occupation (16.6 percent) than either Ward 7 (23.2 percent) or the District (39.1 percent). Marshall Heights residents are most likely to work in administrative support, sales or service occupations (65.2 percent, versus 59.2 percent in Ward 7 and 48.8 percent for the District).

Housing Trends

Housing Units by Year Built. According to the 1990 Census, 86.1 percent of all housing units in the District of Columbia were built before 1970, including nearly 56 percent built prior to 1950 (see Table 6). Within Marshall Heights, housing units were also typically built prior to 1970 (over 87 percent of homes), but a particularly high proportion of units were built during the 1960s (40.6 percent). This is likely due to the construction of the Eastgate Gardens housing complex and other apartment buildings in the area. In Ward 7, 89 percent of homes were built prior to 1970. A notable difference between these three areas lies in the percentage of housing units built during the 1980s. District-wide, 5.5 percent of homes were built in the 1980s. In Marshall Heights, only one percent of its housing units were built during the 1980s, though no units were built from 1985 to 1989.

Housing Units by Tenure and Vacancy. A far greater percentage of housing units in Marshall Heights are occupied by renters rather than by owners. As shown in Table 7, the 1990 Census identified over 70 percent of all occupied housing units in the area as renter-occupied, compared to only 54.8 percent of occupied units in Ward 7 and citywide. Vacancy rates in all three geographic areas were fairly close in 1990. In Marshall Heights, 9.7 percent of the housing units were vacant, similar to 9.5 percent in Ward 7 and 10.4 percent of units citywide.

Housing Units by Number of Units in Structure. According to the 1990 Census, most of the housing structures in Marshall Heights are multi-family structures (69.5 percent). This is substantially different than the distribution of housing structures in Ward 7 (56.7 percent multi-family) and the District of Columbia (62.0 percent multi-family). Table 8 shows that nearly 69 percent of housing structures in Marshall Heights have between three to 19 units, compared to approximately 48 percent in Ward 7 and only 28 percent in the District. Interestingly, Marshall Heights had no housing structures with more than 19 units, unlike Ward 7 (six percent) and the District (30 percent).

This suggests that a new development at Eastgate Gardens should strive to reduce the density of housing in the area. Single-family detached and single-family attached (duplexes) housing structures accounted for less than one-third of all housing units in the area in 1990. Also of note is that a mid-rise or high-rise structure with twenty or more units would be inconsistent with the neighborhood texture.

Reported Value of Owner-Occupied Housing Units. The median reported value for owner-occupied housing in Marshall Heights in 1990 was only $68,064, nearly half the median value of owner-occupied housing in the District ($123,940). The median reported value of owner-occupied housing for Ward 7 fell in between at $85,387 per unit. Less than two percent of Marshall Heights housing units were reported by their owners to be valued at more than $75,000, compared to over 65 percent of Ward 7 housing units and over 86 percent of DC housing units. Among housing units with lower values, 58 percent of Marshall Heights housing was valued at less than $50,000. In Ward 7, the figure was less than six percent of units and District-wide only 2.3 percent of units were valued at less than $50,000.

Contract Rents of Renter-Occupied Housing Units. Table 10 illustrates that the gross rents paid in Marshall Heights in 1990 were generally between $300 and $500. In 1990 approximately 75 percent of the renter-occupied housing units fell in this range; in contrast, the range included 56 percent of Ward 7 gross rents and only 36 percent of DC rents. The largest distinction is between the percentages of higher rents – renter-occupied housing units valued above $600. Nearly 33 percent of the District's rents fell above $600 (in 1990), compared to only 12 percent of Ward 7 rents and only six percent of rental units in Marshall Heights.

Summary

Marshall Heights households are less affluent than the average Ward 7 or District of Columbia household, with median incomes significantly below the District median. Most neighborhood households rent their housing units and live in multi-family structures. The majority of neighborhood residents have not received a higher education degree and unemployment rates are higher than both Ward 7 and DC.

Housing throughout the District of Columbia is largely of pre-1970 construction. Almost none of the housing units in Marshall Heights were constructed since 1970. The older housing stock in the area is reflected in housing values far lower than those of both Ward 7 and the District as a whole. Fewer than one-tenth of the housing structures in the neighborhood are single-family detached units. The vast majority of occupied housing units in the area are rental units and rents in the neighborhood are generally lower than those outside the neighborhood.

IV. RENTAL MARKET OVERVIEW

This section describes the rental housing market in the Marshall Heights neighborhood in order to assess market demand and absorption potential for any rental units that may be developed at the Eastgate Gardens site. It also assesses appropriate rent levels for rental housing on the site.

Prior planning initiatives emphasize a community desire for development of ownership housing on the Eastgate Gardens site. However, market realities and the continuing planning process could dictate that rental housing be added to the mix. It is also important to consider the goal of the DC Housing Authority (DCHA) to provide housing opportunities for public housing residents on-site and throughout the adjoining neighborhood. Rental housing may be the most appropriate way to meet this goal.

Rental Housing Need

The primary target markets for rental housing as part of the Eastgate Gardens redevelopment are current public housing residents and renters already living in the neighborhood, but looking for a newer, higher quality housing option. It is important to note that DCHA residents are generally in the very low-income cohort, with household incomes below 30 percent of the area median income (AMI).

It has been well documented that the District of Columbia is confronting a high demand for affordable housing at the very low-income level. (Affordable is generally defined as requiring no more than 30 percent of household income.) This situation is due in part to a strong luxury and high-end housing market, the gentrification of neighborhoods that traditionally served a low-income population, the expiration of property-based Section 8 agreements, and the redevelopment of large-scale public housing properties as mixed-income communities. Residents receiving Section 8 vouchers are often unable to locate rental properties willing to accept the subsidies within the timeframe allocated by the Housing Authority. Even with extensions, very low-income households are frequently unable to find housing to meet their needs.

Rental units in newly renovated public housing properties and project-based Section 8 buildings are absorbed quickly (District-wide), demonstrating strong demand. This is particularly true considering that these units are only available to the subset of the very-low-income population that is on the DC Housing Authority's rent rolls and waiting list. For the working poor, rental housing with easy access to public transportation is in particular demand.

Profile of Target Area Renters

According to the 2000 Census, approximately 60 percent of households in Marshall Heights had annual incomes below 50 percent of AMI (for the Metropolitan Statistical Area). The figure for Ward 7 is approximately 53 percent. Traditionally, renters have lower annual household incomes than homeowners, but a conservative estimate of the number of renter households in the target income range can be found by applying the percentage of total households renting their homes (78 percent in Marshall Heights and 61 percent in Ward 7) to the number of households with annual incomes below 50 percent of AMI. Using this method, it can be assumed that there are approximately 1,130 renter households in Marshall Heights with annual household incomes below 50 percent of AMI and approximately 9,940 such renter households in Ward 7. By similar methodology, there are approximately 590 Marshall Heights renter households with annual incomes below 30 percent of AMI and approximately 5,490 such renter households in Ward 7.

Renter Households in Target Income Range		
	Marshall Heights	Ward 7
Below 30 AMI	590	5,490
30-50 AMI	540	4,450
Total	1,130	9,940

Existing Competitive Supply

The table below presents the maximum rent levels that are considered affordable to households with incomes between 30 percent and 50 percent of AMI, by household size and bedroom count (see Table 11 in Appendix A). The table below also shows the relationship between the rent levels affordable for the targeted households and Fair Market Rents set under Low Income Housing Tax Credit regulations.

Comparison of Tax Credit Rent Caps and Target Income Range Rent Affordability			
Household Size (Bedroom Count)	**Monthly Affordable Rents (30 Percent AMI)**	**Monthly Affordable Rents (50 Percent AMI)**	**2002 LIHTC Rent Caps by BR**
1 Person HH (1BR)	$449	$749	$804
2 Person HH (1 or 2 BR)	$514	$856	$804 - $943
3 Person HH (2 or 3 BR)	$578	$963	$943 - $1,285
4 Person HH (3BR)	$642	$1,070	$1,285

Existing Multi-Family Projects. Based on the above table, it is likely that rental units built elsewhere in Ward 7 and throughout the city would compete with new construction at the Eastgate Gardens site for tenants in the targeted income range.

To analyze the competitiveness of any new rental units developed as part of the Eastgate Gardens redevelopment plan, this study collected data regarding rental units throughout Marshall Heights. Information was collected through key informant interviews and direct observation. JLC surveyed a total of 10 projects, with a total of 960 units (see Table 16 in Appendix A). This inventory includes projects with as few as 24 units and as many as 281 units. Apartment types ranged from efficiencies to three-bedroom units and the projects ranged from less than 10 years old (renovation in 1996) to approximately 80 years old. The age of these units is consistent with data from the 1990 Census.

Most of the units profiled in Table 15 (see Appendix A) were constructed prior to 1980. According to property managers and leasing representatives contacted for this survey, vacancy rates ranged from zero to 20 percent, but most projects had vacancies below five percent.

Although not all of those contacted were able to provide a breakdown of unit types, among those who did, two-bedroom units seemed to be predominate, particularly in the developments with fewer than 40 units. Of the 373 units identified by type, 333 were two-bedroom units. JLC's survey results represent properties within Marshall Heights or within a half mile of it. The results demonstrate that very few of

the older buildings most common in the area provide three-bedroom units suitable for the family households common to the area.

Rental rates and square footages by bedroom size at the projects listed in Table 15 vary widely, indicating a variety of apartment types. The data from the 10 properties surveyed reflect the existence of low-end properties with rents for one-bedroom units between $365 and $430 and for two-bedroom units between $400 and $465. Rent and square foot ranges are as follows:

Rent and Size Ranges for Marshall Heights Apartments

	Rent Range		Square Footage	
Unit Type	Low	High	Low	High
Efficiency	$425	$425	n/a	n/a
1 BR	$365	$575	512	600
2 BR	$400	$895	621	889
3 BR	$450	$801	725	1,000

In this survey, nearly all of the apartment complexes required a 12-month lease, though some allowed month-to-month leases. Tenants are typically responsible for utilities, such as gas and electric.

None of the properties surveyed was renovated recently enough to offer absorption information. The range in rents reflects several factors, including the location of the property, the age of the buildings, and the size of the apartment building. Smaller, older buildings do not provide secured access and are generally located directly on the street. Benning Park Terrace, the largest complex in the survey, charged mid-level rents, but provides assigned off-street parking and a gate around the property.

Planned Competitive Supply

According to the DC Office of Planning and community members, additional renovations of rental properties are planned for the at least two large complexes in the target area. The first is the George Washington Carver Apartments, an existing and tenanted apartment complex in the northwest corner of the target area. The tenant association is working with H.R. Crawford to renovate the 220-unit complex (one- and two-bedroom units). Recent discussions indicate plans to demolish the complex are also being considered. The second is the multi-building, multi-block vacant property directly to the north of the Eastgate Gardens site. This complex of buildings, known by the name of one of its structures – Amber Overlook, will be renovated by a private developer as 120 market-rate condominiums.

Summary of Unmet Need

Given the number of public housing residents and Section 8 voucher-holders, any public housing units on the site or in the surrounding area should be filled easily. The principal issue for attracting renter households earning more than 30 percent of AMI to the Eastgate Gardens site (for market-rate units) is the perceived value of the rental units. This is due to the greater choice available to these households.

New, or newly renovated, units will be more attractive to renters when the pricing is close to that of other alternatives. The mix of amenities will also influence renters. To compete with the existing supply of rental units, units on the Eastgate Gardens site would benefit from being larger than average to accommodate households needing three- and four-bedroom units.

V. FOR-SALE MARKET OVERVIEW

This section of the study describes the for-sale housing market in the Marshall Heights neighborhood and the surrounding area as a basis for assessing market demand and absorption for planned for-sale units on the Eastgate Gardens site and in the surrounding neighborhood.

Prior planning initiatives emphasize a community desire for development of ownership housing on the Eastgate Gardens site, with initial discussion focusing on a mix of single-family detached and townhouse product. The community and planners agree that infill development throughout the adjacent neighborhood should also focus on single-family structures to further reduce the density of housing in the neighborhood. Infill housing will also play an important role in the overall impact on the neighborhood of the Eastgate Gardens redevelopment project. A recommended infill development strategy was included in the Existing Conditions report submitted as part of this master planning process.

The target market for ownership housing includes residents of both the District of Columbia and nearby Prince George's County, Maryland. First-time homebuyers are likely targets, which implies a focus on households that are currently renting their housing and paying rents that are comparable to the mortgage payments required to purchase a house in the target price range for the Eastgate Gardens redevelopment.

For-Sale Housing Need

The District of Columbia is one of the most heavily renter-occupied cities in the country, with approximately 60 percent of households renting their units – compared to only 35 percent of households nationwide. Although many District residents rent by choice, national averages suggest that over 60 percent of all households want to own their homes. For the District, this corresponds to 151,200 households that would like to own their homes, though only 98,300 households currently do own. That leaves approximately 53,000 District renters interested in buying a home. As housing costs in the District have climbed over the past several years, homeownership has become increasingly difficult for District renters.

Given the costs of residential development, most private developers in the District of Columbia over the past five to ten years have targeted the upper-income and luxury markets with new developments intended to provide developers with the largest financial return. Generally speaking, most of these units have been in multi-family condominium style buildings. Only in the past few years have new townhome developments been developed in the District – and these too have largely been targeted to affluent buyers.

The exceptions to this trend have generally occurred in the District's Ward 7 and Ward 8, where large tracts of land have been available for development and the location has lent itself to meeting the needs of the moderate-income affordable homeownership market. Large-scale developments of townhouse communities and single-family detached homes have found a ready market of buyers and have been absorbed quickly.

Profile of Target Area Homebuyers

According to the 2000 Census, approximately 21 percent of households in Ward 7 (or approximately 6,400 households) had annual incomes between 50 percent and 80 percent of area median income (AMI, for the Metropolitan Statistical Area). This equates to household incomes of between $42,800 and

$68,480 annually. Of all Ward 7 households, 61 percent rented their homes. Traditionally, renters have lower annual household incomes than homeowners, but a working estimate of the number of renter households in this income range can be found by applying the percentage of total households renting their homes to the number of households with annual incomes between 50 percent and 80 percent of AMI. Using this method, it can be assumed that there are approximately 3,900 renter households in Ward 7 with annual household incomes between 50 percent and 80 percent of AMI.

The target market for new affordable ownership projects in the District is typically a first-time homebuyer, either a single-income household with an annual income of approximately $40,000 or a dual-income household with annual income of approximately $60,000. Developers interviewed as part of this study mentioned that their buyers include single parents with a couple of children, federal and District government employees, and others. As renters, these households would likely be paying between $800 and $1,000 per month rent for apartments or homes in the District or nearby Maryland.

This view is consistent with the income levels required to purchase a home in a development focused on providing affordable housing. Given current interest rates, a home selling for $150,000 would require monthly payments of approximately $950.

For homebuyers in any area, safety and educational opportunities for their families are important considerations. Issues of crime and safety in Marshall Heights are addressed in the Existing Conditions report. In general, however, housing developers in Wards 7 and 8 have successfully alleviated many concerns about crime by developing projects large enough to define their own boundaries and provide a critical mass of new structures and residents. This approach results in a self-contained community that many residents consider free from the negative influences of crime in the broader neighborhood. Developers are less able to impact the quality of education at area schools. Given the relatively poor performance by Marshall Heights schools, the target market for the Eastgate Gardens homebuyers will likely include singles and couples without school-age children.

Existing Competitive Supply

Analysis of 2002 Washington, DC area median income levels shows that a four-person household at 50 percent of AMI could afford a home with a sale price of approximately $131,000 (see Table 11 in Appendix A). This assumes that 30 percent of household income is available for principal, interest, tax and insurance (PITI) and that the homebuyer can obtain a 30-year fixed-rate mortgage equal to the sale price, less a five percent down payment. Under the same conditions, a four-person household at 80 percent of AMI could afford a home with a sale price of approximately $210,000.

Although there has been minimal new residential construction in the target area over the past 30 years, new development along the boundaries of the Marshall Heights neighborhood provides a good model for new housing proposed for the Eastgate Gardens site. This study is based on a driving tour of the area; a review of affordable home sale listings; and interviews with city officials, developers, brokers and property managers. Information in this market study includes the number of units available by type, unit amenities, complex amenities, sale prices, etc. For the purposes of this study, data on the existing stock of single-family for-sale housing are presented in two general categories: recently completed housing developments and scattered site re-sales of older single-family housing units.

Recently Completed Housing Developments. Analysis of the market potential of new single-family ownership housing development on the Eastgate Gardens site and in the adjacent Marshall Heights neighborhood benefits from the recent completion of similar projects in the immediate surrounding area

(see Table 17 in Appendix A). Two developments co-developed by the Marshall Heights Community Development Organization (MHCDO) provide an important example of how smaller, self-contained projects can succeed. A third project, on a much larger scale more comparable to that proposed for the Eastgate Gardens site, provides an even closer study of the prospects for affordable homeownership in the area.

Chaplin Woods, a 22-unit development a mile or so west of the Eastgate Gardens site along East Capitol Street, was co-developed with Manna, Inc. Sales of the three-bedroom, 1.5 bath townhouses (with basements) were completed in April 2001, at prices ranging from the low $120,000s to the mid $130,000s. Homes included central air conditioning and all appliances. Each unit has off-street parking. Homebuyers were required to join a homeowners association.

Banneker Ridge, a 27-unit development about half a mile further west than Chaplin Woods, was co-developed with CIH Homes. Sales of the two-, three-, and four-bedroom, 2.5 bath single-family detached homes were completed in 2002 and sold at prices ranging from $145,000 to $165,000. The two-story homes included a basement, with fireplaces, additional bathroom and bedrooms optional. Homebuyers were required to join a homeowners association.

Dupont Commons, a 147-unit townhouse development located between Chaplin Woods and Banneker Ridge, is being developed by Enterprise Homes and the Washington Interfaith Network (WIN) on the site of a former public housing site. Construction of the 1,280 square foot, three-bedroom, 1.5 bath units began in 2001 and is expected to be completed in 2002.

Comparison of Recent Developments

	Chaplin Woods	Banneker Ridge	Dupont Commons
Number of Units	22	27	147
Unit Type(s)	3 BR	2 BR, 3 BR, 4 BR	3 BR
Unit Size (Square Feet)	1,220	1,400 - 1,600	1,280
Sale Price	$122,000 - $135,000	$145,000 - $165,000	n/a

A fourth relevant project is ***Wheeler Creek Estates***, a HOPE VI project completed in 2002 that is also located near the District's border with Prince George's County, Maryland, though in Ward 8. Wheeler Creek Estates is a mix of detached, semi-detached, and townhouse style homes. Ownership opportunities included 104 for-sale homes and 30 additional homes with a lease/purchase option. Construction of the homes, ranging in size from 1,080 square feet to 1,624 square feet, began in 1998 and by November 2001, 70 percent of homebuyers had settled on their units and 90 percent of the lease/purchase units were occupied. Although units ranged in price from $113,000 to $145,000, HOPE VI grants were used to cap the mortgages of homebuyers at $90,000.

Scattered Site Re-Sales. First-time homebuyers interested in living in the Marshall Heights neighborhood do not need to wait for the Eastgate Gardens project to be completed. There is a relatively active re-sale market for homes in the community. A review of recent home sales in (and very near) the neighborhood shows 10 sales were completed in the three months between May 20, 2002 and August 20, 2002 (see Table 18 in Appendix A). The homes ranged in price from $49,900 to $170,000, with an average price of $116,000. The seven homes that sold for over $100,000 all had a basement, which the

other three homes did not. Three homes sold for more than $140,000, including two homes with three bedrooms and 2.5 baths and a third home with five bedrooms and one bath. The homes ranged in age from 22 years old (built in 1980) to 77 years old (built in 1925) and the lots on which they sit ranged in size from 1,854 square feet to 8,000 square feet.

Planned Competitive Supply

In addition to the projects noted above, Table 17 (see Appendix A) also shows the pending development of two nearby projects. Marshall Heights is located adjacent to the East Capitol HOPE VI project, which will include 145 single-family attached and detached homes as part of the ***New East Capitol View*** development. Marshall Heights CDO will also be developing a new project with CIH Homes. ***Hilltop Terrace*** will include 21 new single-family detached homes, each with three bedrooms and 2.5 baths.

Other Ownership Housing Options

Many potential buyers of new homes developed on the Eastgate Gardens site and in the surrounding neighborhood will also be willing to consider the re-sale market for homes in nearby Prince George's County, Maryland. Although they might consider buying an older home, this study has focused on the availability of homes less than 15 years old in the Prince George's County communities closest to the Eastgate Gardens site. As shown in Table 19 in Appendix A, from May 20, 2002 through August 20, 2002, only eight homes were sold fitting these criteria. Prices ranged from $110,000 to $154,950. As a whole, these homes provided more bedrooms than those sold during the same period in Marshall Heights, with five of the eight homes having four bedrooms and two (or three) baths. Only the lowest priced home did not have a basement. Lots ranged in size from 1,500 square feet to 8,000 square feet.

Another option available to homebuyers interested in the Eastgate area is the ***Vision Condominiums*** directly across from the Eastgate site at 51st and F Streets, SE (see Table 17). This project includes two buildings, with parking in between, and a total of 24 units – half one-bedrooms and half two-bedrooms. The property was purchased in April 2001 and the owner began taking reservations for units in February 2002. Construction continues, but move-in is expected to begin in September 2002. One building is nearly sold out and the other is selling well, according to the developer. The average sale price is $88,000 for the 715 square foot (one bedroom) and 880 square foot (two bedroom) units.

Summary of Unmet Need

The presence and development of comparable home ownership properties in the vicinity of the Eastgate site seems to suggest that there is a strong demand for this type of product, rather than that the market is becoming saturated. Combined with the relatively active re-sale market, it appears as thought there is a consistent demand for homeownership in the neighborhood.

With this in mind, subdivisions have an advantage over either in-fill housing or re-sales in that the critical mass of homes built as part of a new project minimizes the impact of any nearby blighted properties. New homes are also better able to meet many of the needs of today's homebuyers than older re-sale homes by providing such amenities as central air conditioning and heat, efficient appliances, and home security. The re-sale homes identified in both Marshall Heights and Prince George's County were often over 50 years old and rarely under 15.

VI. SENIOR HOUSING MARKET OVERVIEW

Redevelopment planning for Eastgate Gardens has considered the inclusion of senior rental housing as part of the overall revitalization plan. Pending additional community input and finalization of a development plan, this study analyzes the market for senior rental housing in the Marshall Heights neighborhood. It is expected that any senior units will be public housing units.

Senior Housing Need

According to data gathered as part of the 2000 Census, in 2001, there were 563 seniors (age 65 and older) living in Marshall Heights and a total of 8,947 seniors living in Ward 7. Of the 563 seniors in Marshall Heights, 412 were head of their households; the same is true of 6,406 seniors in Ward 7 (see Table 12 in Appendix A). Based on figures from the 1990 Census, approximately 25 percent of Marshall Heights seniors were living alone, as were 35 percent of Ward 7 seniors. Applied to the 2001 senior population, this indicates that 103 seniors were living alone in Marshall Heights – a small portion of a total of 2,242 seniors living alone in Ward 7. Whether living in apartments or owning their homes, these seniors living alone will gradually be less able to care for themselves and their properties without the type of support that can come from living in a facility that caters to the needs of seniors.

According to the 1990 Census – and verified by direct observation – there are no group quarters for seniors in Marshall Heights, and only 2.6 percent of seniors were living in a senior facility anywhere in Ward 7 in 1990. The lack of any senior housing facility in Marshall Heights and the significant number of seniors living alone suggests that there is a ready market for a senior housing facility.

Profile of Target Senior Renters

Table 12 in Appendix A shows that among senior heads of household, a significant proportion in each study area have household incomes below $15,000 per year (28.9 percent of Marshall Heights senior households and 29.9 percent of Ward 7 senior households). Generally speaking, senior heads of households currently living in the Marshall Heights neighborhood are living in families (or alone) with household incomes at the lower end of the economic spectrum.

Whether living alone or with families, in a home or apartment, seniors are often unwilling to leave their long-time residences for a new home. This is particularly true when moving to a senior facility means leaving the community they have long called home. For this reason, a senior housing facility in the Marshall Heights neighborhood would have particular appeal to senior residents already in the community.

Existing Competitive Supply

Interviews with DC Office of Planning officials and community representatives indicate that the only senior housing in or near the target area is still in the planning or development stages. One relevant example of a recently completed senior building, however, is the ***Wheeler Creek Estates Senior Center*** in Ward 8. Completed in 2000 as part of a HOPE VI project, the center provides 100 one-bedroom apartments with a full kitchen in each unit. Outside services (Meals on Wheels, cleaning, visiting nurses, etc.) are provided access to the building, though the facility is designed to provide independent living opportunities for residents. The center, which is entirely public housing, quickly leased up to full occupancy.

Planned Competitive Supply

The lack of senior housing in the target area is reflected in the proposals prepared by developers of pending projects. As shown in Table 20 (see Appendix A), proposed projects include the senior housing portion of the East Capitol HOPE VI project just east of Marshall Heights. The ***New East Capitol Senior Housing*** will include 152 one-bedroom units in a single three-story building with a laundry room on each floor. Each unit will have a full kitchen and the building will have extensive community space. A second proposed project, the ***JW King Senior Center***, has been proposed for development by the First Rock Church Foundation on a site just west of the Eastgate Gardens site on the far side of Benning Road, SE. The 75-unit facility, as proposed, would include 61 one-bedroom units and 14 two-bedroom units in a four-story senior center that would also provide senior daycare and childcare. This facility would provide a central dining room, a beauty/barber shop and a medical clinic on-site. A third proposed project, ***Randle Highlands Manor***, is currently being moved through the zoning process by the Anacostia Economic Development Corporation. The proposed four-story building would serve as an assisted living facility providing 24-hour supervision and emergency services. Each of the 52 one-bedroom units would have a private bath, but no kitchen. Meals would be provided in a central dining area.

Summary of Unmet Need

There is a significant population of low-income senior-headed households in Marshall Heights and in Ward 7 as a whole. This population is not currently served by senior housing facilities and those in the planning stages may not come to fruition. As the population ages, the need for senior housing will only increase.

A new facility offering a package of amenities similar to those at any of the projects discussed in this survey would likely be attractive to a sufficient number of senior renter households to lease up quickly. Development of a new senior housing community on the Eastgate site would need to target lower-income households and would likely be entirely public housing.

Some senior homeowners may also be interested in selling their homes and moving into a smaller apartment that would be easier to manage. An outreach program that targets these senior homeowners could involve the purchase and renovation of their homes to add to the revitalization of infill housing in the community. Seniors who are not candidates for public housing would be part of the overall market for rental units on the site, with a likely interest in two-bedroom units.

VII. CONCLUSIONS AND RECOMMENDATIONS

The preceding analysis of market demand for new housing in Marshall Heights has shown potential for each of the three types of housing considered – multi-family rentals, for-sale single-family homes, and senior rental units. The ultimate mix of unit types will need to respond to community input, as well as project financial and land planning considerations. To be most competitive, the project should be designed with moderate densities, significantly below those of the former Eastgate Gardens.

Rental Housing

The variety of rental options in the target area and the low vacancy rates in most operating properties demonstrates the demand for rental housing in the target area. Although there has been no new development of rental housing, there have been recent renovations of properties that have successfully leased up. More renovations are planned. A survey of area apartment buildings indicates a proven market for two-bedroom units and an unmet need for units larger than a typical two-bedroom unit.

If the community determines that the Eastgate Gardens site should include rental housing, the unit mix should lean heavily toward three-bedroom units, with some large two-bedroom units also included. The rental housing should be designed to complement the single-family homes in scale; rental units should be in either townhouses or multi-unit "grand" houses that are closer is style to single-family homes than to the rectangular block buildings that currently house most of the neighborhood's rental units. Amenities in these units should include all kitchen appliances, a washer/dryer hookup, central air conditioning and heating.

Recommended Rental Housing Mix

Unit Type	Size	Rent	% of Units
2 BR (large)	850 sf	$750	20%
3 BR	950 sf	$850	80%

For-Sale Single-Family Housing

The experience of recent new home developments in the Marshall Heights area suggests good market potential for three- and four-bedroom single-family houses priced between $130,000 and $170,000. Assuming it is consistent with community input and the final development plan, the Eastgate Gardens site could include approximately 120 single-family units. Units should average between 1,200 and 1,600 square feet, depending on the unit type. Design should include a mix of single-family attached and detached homes. All of the for-sale housing units should have a basement, central air conditioning and heat, all appliances, and security. Additional options should be made available to buyers.

Recommended For-Sale Housing Mix			
Unit Type	**Size**	**Sale Price**	**% of Units**
3 BR/2.5 BA	1,200 sf	$130,000 - $170.000	80%
4 BR/2.5 BA	1,600 sf	$130,000 - $170.000	20%

Senior Housing

Given the lack of senior housing options in the Marshall Heights community, the Eastgate Gardens site could – if supported by the community and the final development plan – accommodate a development of approximately 100 senior housing units, particularly if all of these units are to be part of the public housing system. Any senior housing developed on-site should be an independent (not assisted) living facility, but it should also provide and facilitate access to the facility by outside service providers. The senior housing should include a community room and laundry facilities, and each unit should have its own kitchen.

Recommended Senior Housing Mix		
Unit Type	**Size**	**% of Units**
1 BR/1 BA	600 sf	85%
2 BR/1 BA	750 sf	15%

APPENDIX A: TABLES

Table 1: Population and Household Trends, 1990 - 2001

Marshall Heights[1]	1990	2001	Average Annual Change '90-'01
Population	8,445	5,960	-3.1%
Households	3,303	2,483	-2.6%
Average Household Size	2.56	2.40	-0.6%
Household Type			
Families	62.4%	61.9%	-0.1%
Non-Families	37.6%	38.1%	0.1%
Tenure			
Owner	22.3%		
Renter	77.7%		
Ward 7[2]			
Population	79,691	70,675	-1.1%
Households	31,808	29,852	-0.6%
Average Household Size	2.49	2.35	-0.5%
Household Type			
Families	62.6%	61.8%	-0.1%
Non-Families	37.4%	38.2%	0.2%
Tenure			
Owner	39.5%		
Renter	60.5%		
District of Columbia[3]			
Population	606,900	572,223	-0.5%
Households	249,634	251,966	0.1%
Average Household Size	2.26	2.12	-0.6%
Household Type			
Families	48.9%	47.4%	-0.3%
Non-Families	51.1%	52.6%	0.3%
Tenure			
Owner	38.9%		
Renter	61.1%		

Notes:

[1] Marshall Heights is comprised of Census Tracts 99.04, 99.05, and 99.06.

[2] Ward 7 is comprised of the Eastgate Plus Census Tracts plus these additional tracts: 76.03, 76.04, 76.05, 77.03, 77.07, 77.08, 77.09, 78.03, 78.04, 78.06, 78.07, 78.08, 78.09, 79.03, 96.01, 96.02, 96.03, 96.04, 99.01, 99.02, 99.03, 99.07. (From the DC Office of Planning)

[3] District of Columbia refers to the area within the boundaries of the District, not the MSA.

Sources: 2000 U.S. Census; Claritas, Inc., 2002; The Jair Lynch Companies, 2002.

Table 2: Age Distribution 2001

Age	Marshall Heights[1]		Ward 7[2]		District of Columbia[3]	
	Number	Pct. of Total	Number	Pct. of Total	Number	Pct. of Total
Under 20	1,894	31.8%	20,305	28.7%	136,429	23.8%
20-29	752	12.6%	8,713	12.3%	78,623	13.7%
30-39	920	15.4%	10,279	14.5%	95,266	16.6%
40-54	1,330	22.3%	15,542	22.0%	133,566	23.3%
55-64	501	8.4%	6,889	9.7%	55,522	9.7%
65 and over	563	9.4%	8,947	12.7%	72,817	12.7%
65-74	*340*	*5.7%*	*5,207*	*7.4%*	*40,376*	*7.1%*
75-84	*174*	*2.9%*	*2,896*	*4.1%*	*23,767*	*4.2%*
85 and over	*49*	*0.8%*	*844*	*1.2%*	*8,674*	*1.5%*
Total	5,960	100.0%	70,675	100.0%	572,223	100.0%
Median Age	33.8		36.3		37.5	

Notes:

[1] Marshall Heights is comprised of Census Tracts 99.04, 99.05, and 99.06.

[2] Ward 7 is comprised of the Marshall Heights Census Tracts plus these additional tracts: 76.03, 76.04, 76.05, 77.03, 77.07, 77.08, 77.09, 78.03, 78.04, 78.06, 78.07, 78.08, 78.09, 79.03, 96.01, 96.02, 96.03, 96.04, 99.01, 99.02, 99.03, 99.07. (From the DC Office of Planning)

[3] District of Columbia refers to the area within the boundaries of the District, not the MSA.

Sources: 2000 U.S. Census; Claritas, Inc., 2002; The Jair Lynch Companies, 2002.

Table 3: 2001 Household Income Distribution

	Marshall Heights[1]		Ward 7[2]		District of Columbia[3]	
Income Range	**Households**	**Pct. of Total**	**Households**	**Pct. of Total**	**Households**	**Pct. of Total**
Less than $10,000	277	11.2%	3,711	12.4%	25,553	10.1%
$10,000 - $19,999	306	12.3%	3,614	12.1%	26,785	10.6%
$20,000 - $24,999	188	7.6%	1,681	5.6%	11,671	4.6%
$25,000 - $29,999	222	8.9%	2,161	7.2%	14,003	5.6%
$30,000 - $34,999	261	10.5%	2,347	7.9%	15,734	6.2%
$35,000 - $49,999	459	18.5%	5,598	18.8%	38,841	15.4%
$50,000 - $74,999	540	21.7%	5,574	18.7%	44,456	17.6%
$75,000 - $99,999	125	5.0%	2,558	8.6%	27,005	10.7%
$100,000 - $149,999	82	3.3%	1,874	6.3%	24,686	9.8%
$150,000 or more	23	0.9%	734	2.5%	23,232	9.2%
Total Households	2,483	100.0%	29,852	100.0%	251,966	100.0%
Median Income	$34,733		$38,185		$46,968	

Notes:

[1] Marshall Heights is comprised of Census Tracts 99.04, 99.05, and 99.06.

[2] Ward 7 is comprised of the Marshall Heights Census Tracts plus these additional tracts: 76.03, 76.04, 76.05, 77.03, 77.07, 77.08, 77.09, 78.03, 78.04, 78.06, 78.07, 78.08, 78.09, 79.03, 96.01, 96.02, 96.03, 96.04, 99.01, 99.02, 99.03, 99.07. (From the DC Office of Planning)

[3] District of Columbia refers to the area within the boundaries of the District, not the MSA.

Sources: 2000 U.S. Census; Claritas, Inc., 2002; The Jair Lynch Companies, 2002.

Table 4: 1990 Educational Attainment for Population 25 Years of Age and Older

Education Level	Marshall Heights[1]		Ward 7[2]		District of Columbia[3]	
	Number	Pct. of Total	Number	Pct. of Total	Number	Pct. of Total
Less than 9th Grade	560	11.1%	5,067	9.8%	39,107	9.6%
9th to 12th Grade, No Diploma	1,469	29.0%	13,129	25.5%	70,759	17.3%
High School Graduate	1,855	36.7%	15,957	30.9%	86,756	21.2%
Some College, No Degree	797	15.8%	9,867	19.1%	63,677	15.6%
Associate Degree	103	2.0%	1,417	2.7%	12,547	3.1%
Bachelor's Degree	182	3.6%	3,860	7.5%	65,892	16.1%
Graduate or Prof. Degree	92	1.8%	2,288	4.4%	70,393	17.2%
Total	5,058	100.0%	51,585	100.0%	409,131	100.0%

Notes:

[1] Marshall Heights is comprised of Census Tracts 99.04, 99.05, and 99.06.

[2] Ward 7 is comprised of the Marshall Heights Census Tracts plus these additional tracts: 76.03, 76.04, 76.05, 77.03, 77.07, 77.08, 77.09, 78.03, 78.04, 78.06, 78.07, 78.08, 78.09, 79.03, 96.01, 96.02, 96.03, 96.04, 99.01, 99.02, 99.03, 99.07. (From the DC Office of Planning)

[3] District of Columbia refers to the area within the boundaries of the District, not the MSA.

Sources: 2000 U.S. Census; Claritas, Inc., 2002; The Jair Lynch Companies, 2002.

Table 5: 1990 Occupation of Employed Residents 16 Years of Age and Older

Residents' Occupation	Marshall Heights[1]		Ward 7[2]		District of Columbia[3]	
	Number	Pct. of Total	Number	Pct. of Total	Number	Pct. of Total
Managerial/ Professional	630	16.6%	8,253	23.2%	118,853	39.1%
Technical/ Sales/ Admn. Support	1,679	44.2%	14,089	39.6%	97,236	32.0%
Service Occupation	796	21.0%	6,979	19.6%	50,518	16.6%
Farming/ Forestry/ Fishing	26	0.7%	140	0.4%	1,282	0.4%
Precision/ Craft/ Repair	190	5.0%	2,203	6.2%	13,698	4.5%
Operator/ Fabricators/ Laborers	478	12.6%	3,872	10.9%	22,407	7.4%
Machine Oper./ Assem./ Inspect	*152*	*4.0%*	*958*	*2.7%*	*5,151*	*1.7%*
Trans.& Material Moving	*255*	*6.7%*	*1,908*	*5.4%*	*10,060*	*3.3%*
Handlers/ Helpers/ Laborers	*71*	*1.9%*	*1,006*	*2.8%*	*7,196*	*2.4%*
Total	3,799	100.0%	35,536	100.0%	303,994	100.0%

Notes:

[1] Marshall Heights is comprised of Census Tracts 99.04, 99.05, and 99.06.

[2] Ward 7 is comprised of the Marshall Heights Census Tracts plus these additional tracts: 76.03, 76.04, 76.05, 77.03, 77.07, 77.08, 77.09, 78.03, 78.04, 78.06, 78.07, 78.08, 78.09, 79.03, 96.01, 96.02, 96.03, 96.04, 99.01, 99.02, 99.03, 99.07. (From the DC Office of Planning)

[3] District of Columbia refers to the area within the boundaries of the District, not the MSA.

Sources: 2000 U.S. Census; Claritas, Inc., 2002; The Jair Lynch Companies, 2002.

Table 6: 1990 Housing Units By Year Built

Year Built	Marshall Heights[1]		Ward 7[2]		District of Columbia[3]	
	Number	Pct. of Total	Number	Pct. of Total	Number	Pct. of Total
1989 to March 1990	0	0.0%	77	0.2%	1,649	0.6%
1985 to 1988	0	0.0%	249	0.7%	4,731	1.7%
1980 to 1984	38	1.1%	407	1.2%	9,048	3.2%
1970 to 1979	412	11.5%	3,110	8.9%	23,279	8.4%
1960 to 1969	1,452	40.6%	7,402	21.1%	41,412	14.9%
1950 to 1959	633	17.7%	7,264	20.7%	43,176	15.5%
1940 to 1949	732	20.5%	11,018	31.4%	50,328	18.1%
1939 or Earlier	305	8.5%	5,578	15.9%	104,866	37.7%
Total	3,572	100.0%	35,105	100.0%	278,489	100.0%

Notes:

[1]Marshall Heights is comprised of Census Tracts 99.04, 99.05, and 99.06.

[2] Ward 7 is comprised of the Marshall Heights Census Tracts plus these additional tracts: 76.03, 76.04, 76.05, 77.03, 77.07, 77.08, 77.09, 78.03, 78.04, 78.06, 78.07, 78.08, 78.09, 79.03, 96.01, 96.02, 96.03, 96.04, 99.01, 99.02, 99.03, 99.04, 99.05, 99.06, 99.07. (From the DC Office of Planning)

[3] District of Columbia refers to the area within the boundaries of the District, not the MSA.

Sources: 2000 U.S. Census; Claritas, Inc., 2002; The Jair Lynch Companies, 2002.

Table 7: 1990 Housing Units: Tenure and Vacancy

Tenure	Marshall Heights[1]		Ward 7[2]		District of Columbia[3]	
	Number	Pct. of Total	Number	Pct. of Total	Number	Pct. of Total
Owner-Occupied Housing Units	719	20.1%	12,533	35.7%	97,085	34.9%
Renter-Occupied Housing Units	2,508	70.2%	19,235	54.8%	152,549	54.8%
Vacant Housing Units	345	9.7%	3,337	9.5%	28,855	10.4%
Total	3,572	100.0%	35,105	100.0%	278,489	100.0%

Notes:

[1] Marshall Heights is comprised of Census Tracts 99.04, 99.05, and 99.06.

[2] Ward 7 is comprised of the Marshall Heights Census Tracts plus these additional tracts: 76.03, 76.04, 76.05, 77.03, 77.07, 77.08, 77.09, 78.03, 78.04, 78.06, 78.07, 78.08, 78.09, 79.03, 96.01, 96.02, 96.03, 96.04, 99.01, 99.02, 99.03, 99.07. (From the DC Office of Planning)

[3] District of Columbia refers to the area within the boundaries of the District, not the MSA.

Sources: 2000 U.S. Census; Claritas, Inc., 2002; The Jair Lynch Companies, 2002.

Table 8: 1990 Housing Units by Number of Units in Structure

Number of Units in Structure	Marshall Heights[1]		Ward 7[2]		District of Columbia[3]	
	Number	Pct. of Total	Number	Pct. of Total	Number	Pct. of Total
Single Detached Unit	322	9.0%	5,600	16.0%	34,428	12.4%
Single Attached Unit	766	21.4%	9,591	27.3%	71,471	25.7%
Structures with 2 Units	22	0.6%	944	2.7%	8,697	3.1%
Structures with 3 to 4 Units	319	8.9%	3,833	10.9%	21,635	7.8%
Structures with 5 to 9 Units	495	13.9%	5,232	14.9%	20,603	7.4%
Structures with 10 to 19 Units	1,648	46.1%	7,658	21.8%	37,207	13.4%
Structures with 20 to 49 Units	0	0.0%	756	2.2%	20,298	7.3%
Structures with 50+ Units	0	0.0%	1,383	3.9%	61,533	22.1%
Mobile Homes/ Trailers or Other	0	0.0%	108	0.3%	2,617	0.9%
Total	3,572	100.0%	35,105	100.0%	278,489	100.0%

Notes:

[1] Marshall Heights is comprised of Census Tracts 99.04, 99.05, and 99.06.

[2] Ward 7 is comprised of the Marshall Heights Census Tracts plus these additional tracts: 76.03, 76.04, 76.05, 77.03, 77.07, 77.08, 77.09, 78.03, 78.04, 78.06, 78.07, 78.08, 78.09, 79.03, 96.01, 96.02, 96.03, 96.04, 99.01, 99.02, 99.03, 99.07. (From the DC Office of Planning)

[3] District of Columbia refers to the area within the boundaries of the District, not the MSA.

Sources: 2000 U.S. Census; Claritas, Inc., 2002; The Jair Lynch Companies, 2002.

Table 9: 1990 Specified Owner-Occupied Housing Units by Value

Housing Units By Value	Marshall Heights[1]		Ward 7[2]		District of Columbia[3]	
	Number	Pct. of Total	Number	Pct. of Total	Number	Pct. of Total
Under $20,000	9	1.4%	59	0.6%	266	0.4%
$20,000 to $39,999	41	41.7%	225	2.1%	620	0.9%
$40,000 to $49,999	53	14.9%	353	3.3%	794	1.1%
$50,000 to $74,999	334	11.2%	3,062	28.6%	8,192	11.5%
$75,000 to $99,999	181	1.2%	3,976	37.2%	17,055	23.8%
$100,000 to $149,999	36	0.4%	1,883	17.6%	15,000	21.0%
$150,000 to $199,999	7	0.0%	844	7.9%	6,859	9.6%
$200,000 to $299,999	4	0.0%	267	2.5%	8,372	11.7%
$300,000 to $499,999	0	0.0%	30	0.3%	8,961	12.5%
$500,000 and Over	0	0.0%	3	0.0%	5,413	7.6%
Total	665	70.8%	10,702	100.0%	71,532	100.0%
Median Housing Value	$ 68,064		$ 85,387		$ 123,940	

Notes:

[1] Marshall Heights is comprised of Census Tracts 99.04, 99.05, and 99.06.

[2] Ward 7 is comprised of the Marshall Heights Census Tracts plus these additional tracts: 76.03, 76.04, 76.05, 77.03, 77.07, 77.08, 77.09, 78.03, 78.04, 78.06, 78.07, 78.08, 78.09, 79.03, 96.01, 96.02, 96.03, 96.04, 99.01, 99.02, 99.03, 99.07. (From the DC Office of Planning)

[3] District of Columbia refers to the area within the boundaries of the District, not the MSA.

Sources: 2000 U.S. Census; Claritas, Inc., 2002; The Jair Lynch Companies, 2002.

Table 10: 1990 Specified Renter-Occupied Housing Units by Value

Units by Gross Rent	Marshall Heights[1]		Ward 7[2]		District of Columbia[3]	
	Number	Pct. of Total	Number	Pct. of Total	Number	Pct. of Total
With Cash Rent	2,508	100.0%	18,971	99.2%	149,412	98.3%
Less than $100	*36*	*1.4%*	*562*	*2.9%*	*4,253*	*2.8%*
$100 to $149	*34*	*1.4%*	*788*	*4.1%*	*6,479*	*4.3%*
$150 to $199	*47*	*1.9%*	*646*	*3.4%*	*3,955*	*2.6%*
$200 to $249	*48*	*1.9%*	*547*	*2.9%*	*4,271*	*2.8%*
$250 to $299	*152*	*6.1%*	*1,077*	*5.6%*	*6,777*	*4.5%*
$300 to $399	*1,138*	*45.4%*	*5,504*	*28.8%*	*25,519*	*16.8%*
$400 to $499	*754*	*30.1%*	*5,295*	*27.7%*	*29,527*	*19.4%*
$500 to $599	*148*	*5.9%*	*2,442*	*12.8%*	*21,689*	*14.3%*
$600 to $749	*94*	*3.7%*	*1,386*	*7.2%*	*20,316*	*13.4%*
$750 to $999	*47*	*1.9%*	*593*	*3.1%*	*15,649*	*10.3%*
$1,000 or More	*10*	*0.4%*	*131*	*0.7%*	*10,977*	*7.2%*
No Cash Rent	0	0.0%	156	0.8%	2,657	1.7%
Total	2,508	100.0%	19,127	100.0%	152,069	100.0%

Notes:

[1] Marshall Heights is comprised of Census Tracts 99.04, 99.05, and 99.06.

[2] Ward 7 is comprised of the Marshall Heights Census Tracts plus these additional tracts: 76.03, 76.04, 76.05, 77.03, 77.07, 77.08, 77.09, 78.03, 78.04, 78.06, 78.07, 78.08, 78.09, 79.03, 96.01, 96.02, 96.03, 96.04, 99.01, 99.02, 99.03, 99.07. (From the DC Office of Planning)

[3] District of Columbia refers to the area within the boundaries of the District, not the MSA.

Sources: 2000 U.S. Census; Claritas, Inc., 2002; The Jair Lynch Companies, 2002.

Table 11: 2002 Affordable Housing Costs, Washington, DC MSA

	Household Income (a)	Gross Monthly Rent (b)	Sale Price	Down Payment (c)	Total Mortgage	Monthly Payment	Monthly Property Tax (d)	Monthly Insurance (e)	Total Monthly PITI (f,g)
30 Percent of Area Median Income									
1 Person HH	$17,976	$449	$55,116	$2,756	$52,360	$348.35	$91.86	$9.19	$449.40
2 Person HH	$20,544	$514	$62,990	$3,149	$59,840	$398.12	$104.98	$10.50	$513.60
3 Person HH	$23,112	$578	$70,863	$3,543	$67,320	$447.88	$118.11	$11.81	$577.80
4 Person HH	$25,680	$642	$78,737	$3,937	$74,800	$497.65	$131.23	$13.12	$642.00
50 Percent of Area Median Income									
1 Person HH	$29,960	$749	$91,860	$4,593	$87,267	$580.59	$153.10	$15.31	$749.00
2 Person HH	$34,240	$856	$104,983	$5,249	$99,734	$663.53	$174.97	$17.50	$856.00
3 Person HH	$38,520	$963	$118,106	$5,905	$112,200	$746.47	$196.84	$19.68	$963.00
4 Person HH	$42,800	$1,070	$131,229	$6,561	$124,667	$829.41	$218.71	$21.87	$1,070.00
80 Percent of Area Median Income									
1 Person HH	$47,936	$1,198	$146,976	$7,349	$139,627	$928.94	$244.96	$24.50	$1,198.40
2 Person HH	$54,784	$1,370	$167,973	$8,399	$159,574	$1,061.65	$279.95	$28.00	$1,369.60
3 Person HH	$61,632	$1,541	$188,969	$9,448	$179,521	$1,194.36	$314.95	$31.49	$1,540.80
4 Person HH	$68,480	$1,712	$209,966	$10,498	$199,468	$1,327.06	$349.94	$34.99	$1,712.00

Note: (a) From HUD, 2002.

(b) Percent of household income available for gross rent	30%
Gross monthly rent includes all utilities.	
(c) Mortgage terms:	
Annual Interest Rate (Fixed)	7.0%
Term of mortgage (Years)	30
Percent of sale price as down payment	5.0%
(d) Initial property tax rate (Annual)	2.0%
(e) Annual insurance rate as percent of sale price	0.2%
(f) PITI = Principal, Interest, Taxes, and Insurance	
(g) Percent of household income available for PITI	30%

Sources: U.S. Department of Housing and Urban Development, 2002; The Jair Lynch Companies, 2002

Table 12: 2001 Income of Households with a Senior (65+) Householder

Income	Marshall Heights[1]		Ward 7[2]		District of Columbia[3]	
	Number	Pct. of Total	Number	Pct. of Total	Number	Pct. of Total
Under $15,000	119	28.9%	1,918	29.9%	13,789	27.4%
$15,000 to $24,999	71	17.2%	790	12.3%	6,013	12.0%
$25,000 to $34,999	61	14.8%	1,011	15.8%	5,860	11.7%
$35,000 to $49,999	56	13.6%	917	14.3%	6,534	13.0%
$50,000 to $74,999	92	22.3%	902	14.1%	6,864	13.7%
$75,000 to $99,999	9	2.2%	415	6.5%	4,009	8.0%
$100,000 and Over	4	1.0%	453	7.1%	7,180	14.3%
Total	412	100.0%	6,406	100.0%	50,249	100.0%

Notes:

[1] Marshall Heights is comprised of Census Tracts 99.04, 99.05, and 99.06.

[2] Ward 7 is comprised of the Marshall Heights Census Tracts plus these additional tracts: 76.03, 76.04, 76.05, 77.03, 77.07, 77.08, 77.09, 78.03, 78.04, 78.06, 78.07, 78.08, 78.09, 79.03, 96.01, 96.02, 96.03, 96.04, 99.01, 99.02, 99.03, 99.07. (From the DC Office of Planning)

[3] District of Columbia refers to the area within the boundaries of the District, not the MSA.

Sources: 2000 U.S. Census; Claritas, Inc., 2002; The Jair Lynch Companies, 2002.

Table 13: 1990 Senior (65+) Household Type

Household Type	Marshall Heights[1]		Ward 7[2]		District of Columbia[3]	
	Number	Pct. of Total	Number	Pct. of Total	Number	Pct. of Total
Living Alone	178	24.9%	3,597	35.1%	28,170	36.3%
In Families	516	72.1%	6,069	59.3%	40,174	51.7%
In Non-Families	22	3.1%	307	3.0%	3,232	4.2%
In Group Quarters	0	0.0%	266	2.6%	6,096	7.8%
Total	716	100.0%	10,239	100.0%	77,672	100.0%

Notes:

[1] Marshall Heights is comprised of Census Tracts 99.04, 99.05, and 99.06.

[2] Ward 7 is comprised of the Marshall Heights Census Tracts plus these additional tracts: 76.03, 76.04, 76.05, 77.03, 77.07, 77.08, 77.09, 78.03, 78.04, 78.06, 78.07, 78.08, 78.09, 79.03, 96.01, 96.02, 96.03, 96.04, 99.01, 99.02, 99.03, 99.07. (From the DC Office of Planning)

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Sources: 2000 U.S. Census; Claritas, Inc., 2002; The Jair Lynch Companies, 2002.

Table 14: 2001 Expenditures by Selected Product Categories

Selected Product Category	Marshall Heights[1]		Ward 7[2]		District of Columbia[3]	
	Amount ($000s)	US Index	Amount ($000s)	US Index	Amount ($000s)	US Index
Food at Home	$9,099	80	$112,881	83	$984,519	86
Food Away from Home	$6,862	67	$91,031	74	$1,068,051	103
Alcoholic Beverages at Home	$1,226	68	$16,478	76	$205,565	113
Alcoholic Beverages Away from Home	$1,306	74	$17,945	85	$220,995	123
Personal Care Products	$1,179	92	$14,758	96	$137,744	106
Personal Care Services	$725	100	$9,574	109	$97,282	132
Nonprescription Drugs	$380	90	$4,776	94	$39,708	92
Women's Apparel	$2,054	66	$29,143	77	$370,163	116
Men's Apparel	$1,124	61	$15,922	72	$212,932	114
Girls' Apparel	$476	68	$6,343	76	$75,658	107
Boys' Apparel	$392	73	$5,076	78	$58,387	107
Infants' Apparel	$227	71	$2,974	78	$32,980	102
Footwear (Excl. Infants)	$776	71	$10,407	79	$123,970	112
Housekeeping Supplies	$595	82	$7,522	86	$68,011	92
Lawn/Garden Supplies (Incl. Plants)	$339	88	$4,884	106	$49,192	126
Domestic Services	$269	68	$4,418	92	$57,987	144
Household Textiles	$774	56	$12,027	73	$162,173	116
Furniture	$947	56	$14,433	71	$201,514	118
Floor Coverings	$484	56	$7,487	72	$99,869	114
Major Appliances	$903	59	$13,564	73	$175,207	112
Small Appliances & Houseware	$985	47	$16,949	67	$232,349	109
TV, Radio & Sound Equipment	$2,650	68	$37,136	79	$471,952	119
Transportation	$6,470	48	$98,443	60	$1,317,125	96

Notes:

[1] Marshall Heights is comprised of Census Tracts 99.04, 99.05, and 99.06.

[2] Ward 7 is comprised of the Marshall Heights Census Tracts plus these additional tracts: 76.03, 76.04, 76.05, 77.03, 77.07, 77.08, 77.09, 78.03, 78.04, 78.06, 78.07, 78.08, 78.09, 79.03, 96.01, 96.02, 96.03, 96.04, 99.01, 99.02, 99.03, 99.07. (From the DC Office of Planning)

[3] District of Columbia refers to the area within the boundaries of the District, not the MSA.

Sources: 2000 U.S. Census; Claritas, Inc., 2002; The Jair Lynch Companies, 2002.

Table 15: 2001 Expenditures by Selected Store Type

Selected Store Type	Marshall Heights[1]		Ward 7[2]		District of Columbia[3]	
	Amount ($000s)	US Index	Amount ($000s)	US Index	Amount ($000s)	US Index
Building Materials & Garden Equipment	$950	52	$15,218	69	$198,241	107
Hardware Stores	$70	52	$1,125	70	$14,838	109
Lawn/Garden Equipment/Supply Store	$342	56	$5,278	72	$65,202	105
Home Centers	$217	51	$3,533	69	$46,844	108
Gasoline Stations w/Convenience Store	$2,390	69	$30,117	73	$274,741	79
Gasoline Stations w/o Convenience Store	$1,058	65	$13,875	70	$128,267	77
Grocery Stores	$10,173	80	$127,654	83	$1,171,471	91
Health & Personal Care Stores	$2,514	88	$33,372	97	$329,604	114
Eating Places	$5,102	71	$66,379	77	$749,023	103
Drinking Places	$468	73	$6,420	84	$78,756	121
Department Stores (Excl. Leased)	$4,806	65	$67,850	76	$837,703	111
Clothing & Clothing Accessory Stores	$2,503	65	$35,428	77	$450,003	115
Shoe Stores	$432	71	$5,779	79	$68,797	112
Furniture	$861	56	$13,131	72	$180,819	117
Other Home Furnishing Stores	$568	51	$9,304	69	$129,642	114
Household Appliance Stores	$269	58	$4,059	73	$53,794	114
Radio/TV/Other Electronics Stores	$627	59	$9,185	72	$125,627	117
Computer & Software Stores	$261	66	$3,797	80	$49,791	124
Electronic Shopping & Mail Order	$1,252	63	$17,955	75	$226,976	113

Notes:

[1] Marshall Heights is comprised of Census Tracts 99.04, 99.05, and 99.06.

[2] Ward 7 is comprised of the Marshall Heights Census Tracts plus these additional tracts: 76.03, 76.04, 76.05, 77.03, 77.07, 77.08, 77.09, 78.03, 78.04, 78.06, 78.07, 78.08, 78.09, 79.03, 96.01, 96.02, 96.03, 96.04, 99.01, 99.02, 99.03, 99.07. (From the DC Office of Planning)

[3] District of Columbia refers to the area within the boundaries of the District, not the MSA.

Sources: 2000 U.S. Census; Claritas, Inc., 2002; The Jair Lynch Companies, 2002.

Table 16: 2002 Multi-Family Rental Properties, Marshall Heights

Project/Address	Phone#	# Units	Floor Plans	Rental Rates	Square Feet	Open Date	Occupancy	Lease	Comments/Amenities
1. Antoinette Gardens									
1211 Benning Road	(301) 568-0770	n/a	1 BR	$575	600		80%	12 mo	Laundry facility, washer/dryer hookups, air conditioning, cable ready units, parquet floors, community room, 3 playgrounds.
Washington, DC		n/a	2 BR	$625	670				
		n/a	3 BR	$740	725				
		197							
2. 5019 B Street									
Washington, DC	(202) 722-2100	36	Efficiency	$425	n/a		100%	mo-mo	Laundry facility, cable ready units, vinyl floors. Minimum income $21,250.00
Barac Company									
3. 5031 Bass Place									
Washington, DC	(202) 722-2100	36	2 BR	$625	889	1920's	98%	mo-mo	Laundry facility, cable ready units, vinyl floors.
Barac Company									
4. Benning Gardens									
4900 Benning Road	(202) 582-3787	24	2 BR	$600	n/a		95%	12 mo	Hardwood parquet floors, laundry, living room, dining room, A/C, heat, separate electric bill
Washington, DC									
5. CIH Properties									
450 51st Street	(202) 575-2990	72	2BR	$400 - $425	840	n/a	99%	12 mo	Washer/dryer hookups, pool, dishwasher, air cond., fireplace, community center. Many families, single parents, work nearby. $150 deposit.
Washington, DC		4	3BR	$450	1000				
		76							
6. Hampton East Apartments									
4744 Benning Road #102	(202) 583-9004	126	2 BR	$625	n/a	1977	98%	12 mo	Laundry facility, air conditioning, vinyl floors, parking, playground.
Washington, DC		126							
7. Patton Arms Apartments									
5066/5078 Benning Road	(202) 548-3266	39	2 BR	$895	n/a	1960	85%	12 mo	Laundry facility, A/C window units, hard wood floors, Bus station.
Washington, DC									

Table 16: 2002 Multi-Family Rental Properties, Marshall Heights

Project/Address	Phone#	# Units	Floor Plans	Rental Rates	Square Feet	Open Date	Occupancy	Lease	Comments/Amenities
8. Bass Circle Apartments									
4500 Benning Road	(202) 581-0159	n/a	1 BR	$430	n/a		97%	12 mo	Laundry facility, washer/dryer hookups, pool, air conditioning, dishwasher, community center
Washington, DC		n/a	2 BR	$500	n/a				
		n/a	3 BR	$801	n/a				
		112							
9. Benning Park Terrace									
5113 Fitch Street	(202) 582-2100	n/a	1 BR	$365	512	1997	100%	12 mo	Laundry rooms and facilities, d/w, hardwood & carpet, air conditioning, community room, playground, assigned parking
Washington, DC		n/a	2 BR	$465	621	renov.			
		n/a	3 BR	$565	817				
		281							
10. Bennington Apartments									
4559 Benning Road	(202) 582-7155	n/a	1 BR	$480	n/a		87%	12 mo	Laundry facility, wall to wall carpet, A/C, heat, separate electric bill, 5 minutes to metro
Washington, DC		n/a	2 BR	$590	n/a				
		35							

Source: The Jair Lynch Companies, 2002

Table 17: Selected Single-Family Housing Developments

Project/Address	Phone#	Number of Units	Floor Plans	Square Feet	Sale Price	Open Date	Comments/Amenities
Completed and Ongoing Projects							
1. Dupont Commons Bounded by Ridge Rd, Burns St, B & D St, SE Washington, DC 20019 Contact: Enterprise Homes and WIN	(202) 518-0815	147	3BR/1.5BA	1,280	n/a	2003	Townhouse development located 1 mile west of Eastgate. Former public housing site. Targeting 1st time homebuyers, with household incomes $15,000 - $60,000. Full kitchen w/breakfast nook. Options include separate dining room, up to 2 extra BA. Choice of walkout basement, garage and den, or English basement. Fort Dupont public housing residents get first preference. Construction began 2001; expected 2002 completion.
2. Chaplin Woods East Capitol St. & Texas Avenue, SE Washington, DC 20019 Contact: Marshall Heights CDO & Manna	(202) 396-1200	22	3BR/1.5BA	1,220	low $120,000s to mid-$130,000s	2001	Townhouse development located 1 mile west of Eastgate. Market rate sales targeted DC and MD buyers. Last sale April 2001. Homeowners assoc. fee. CAC, all appliances, gas heating, w/w carpeting. Options include cathedral ceilings, gas fireplaces, decks and finished basements. Individual off-street parking.
3. Banneker Ridge Ridge Rd, Anacostia Rd & Minnesota Ave., SE Washington, DC 20019 Contact: Marshall Heights CDO & CIH Homes	(202) 396-1200	2 16 9 27	2BR/2.5BA 3BR/2.5BA 4BR/2.5BA	1,400 - 1,600	$145,000 to $165,000	2002	Single-family detached development. Four models of homes. Options include: finished basement, recreaction room, full BA, master BR, fireplace, additional finishes. Premiums for larger lots. $46 monthly homeowners assoc. fee.
4. Wheeler Creek Estates Wheeler Rd and Valley Rd, SE Washington, DC 20032 Contact: Wheeler Creek CDC	(202) 574-1508	6 n/a n/a 9 104	2 BR TH 3 BR TH 3 BR Duplexes 3 BR SFD	1,080 - 1,624	$113,000 $115,000 - $120,000 $130,000 $145,000	2001	A mix of detached, semi-detached and townhouse style homes. HOPE VI project includes 104 for-sale homes, 30 lease/purchase homes, 100 elderly apts, 48 rental apts, and 32 rental townhomes. Community center. Construction began in Oct. 1998, by Nov. 2001, 70% of homebuyers had settled on their homes and 90% of the lease/purchase units were occupied. HOPE VI grants covered gap beyond maximum $90,000 mortgage; many mortgages capped at $45,000.
Pending Developments							
5. New East Capitol View 58th St and East Capitol St., SE & NE Washington, DC Contact: Cheryl Hamilton, A&R Development	(202) 546-9033	145	n/a	n/a	n/a	n/a	Single-family attached and detached homes. HOPE VI project includes 196 ACC-assisted rental units, 214 affordable and market-rate rental units, and 145 homeownership units. Retail center and office building.
6. Hilltop Terrace Hanna Place & G St., SE Washington, DC 20019 Contact: Marshall Heights CDO & CIH Homes	(202) 396-1200	21	3BR/2.5BA	1,600	low $200,000s	2004	Multi-phase project, with 6 of the 21 units to be part of Phase I. MHCDO has completed construction documents in hand and is in negotiations with the DC government regarding transfer of the property. Construction unlikely before Sept. 2003.
Renovated Condominiums							
7. Vision Condominiums 5105 & 5109 F Street Washington, DC Contact: Vision Condominiums	(202) 581-0022	12 12 24	1 BR 2 BR	715 880	$88,000 avg.	2002	Renovated 2-building condo. Purchased April 2001, began taking reservations February 2002, move in expected September 2002. One building nearly sold out, other selling well. Options include choice of cabinets, hardwood or carpet, vinyl or ceramic tile.

Source: The Jair Lynch Companies, 2002

Table 18: Selected Single-Family For-Sale Projects, Marshall Heights[1]

Address	List Price	Sale Price	Bedrooms	Full Baths	Half Baths	Levels	Fireplaces	Basement	Lot Square Footage	Age
4715 B Street, SE	$110,000	$110,000	2	1	0	2	0	Y	2,160	57
4818 B Street, SE	$51,750	$51,750	2	1	0	2	0	N	2,820	56
4708 Bass Place, SE	$85,000	$85,000	2	1	0	2	0	N	2,160	56
5320 Central Ave, SE	$165,000	$165,000	5	1	0	3	0	Y	7,207	77
5209 D Street, SE	$27,000	$49,900	4	1	1	2	0	N	8,000	52
5344 D Street, SE	$140,000	$143,000	3	2	1	2	0	Y	4,000	22
1100 45th Place, SE	$146,900	$138,000	3	1	0	2	0	Y	5,111	66
1136 45th Place, SE	$170,000	$170,000	3	2	1	3	1	Y	7,608	66
60 54th Street, SE	$135,500	$139,000	3	1	1	3	0	Y	2,738	52
4612 Hanna Place, SE	$110,000	$110,000	3	2	0	3	1	Y	1,854	61

Sources: Metropolitan Regional Information Systems, Inc. *CMA Summary Report (May 20, 2002 - August 20, 2002)*; The Jair Lynch Companies, 2002

Table 19: Selected Single-Family For-Sale Projects, Prince George's County[1]

Address	List Price	Sale Price	Bedrooms	Full Baths	Half Baths	Levels	Fireplaces	Basement	Lot Square Footage	Age
1002 Barnsbury Court	$105,000	$110,000	3	1	1	2	1	N	1,500	12
4308 Byers Street	$154,950	$154,950	4	2	0	2	0	Y	6,000	0
910 57th Place	$149,999	$149,900	4	2	0	2	0	Y	5,232	12
902 57th Place	$154,950	$154,950	4	2	0	2	0	Y	5,775	0
1215 Hybrid Avenue	$137,500	$137,000	3	2	0	2	1	Y	8,000	14
5715 K Street	$154,950	$154,950	4	2	0	2	0	Y	5,775	0
6730 Mountain Lake Place	$115,900	$116,400	3	2	1	3	1	Y	1,600	10
4319 North Addison Road	$150,000	$150,000	4	3	0	2	0	Y	5,763	10

Sources: Metropolitan Regional Information Systems, Inc. *CMA Summary Report (May 20, 2002 - August 20, 2002)*; The Jair Lynch Companies, 2002

Notes:

[1]Properties selected from list of sales completed within the 20743 zip code, between May 20 and August 20, 2002. Selected properties are only those less than 15 years old.

Table 20: Selected Senior Facility Housing Projects, East of the River

Project/Address	Phone#	Number of Units	Floor Plans	Rent	Square Feet	Lease Term	Open Date	Percent Occupied	Comments/Amenities
1. Wheeler Creek Estates Senior Varney Street, SE Washington, DC 20032 Contact: Wheeler Creek CDC	(202) 574-1508	100	1 BR	n/a	500	12 mos.	2000	100%	3-story building. Laundry room each floor, CAC, cable ready, w/w carpet, community room, full kitchen in each unit, outside services provided access to building (Meals on Wheels, cleaning, visiting nurses, health fair, etc.)
2. Randle Highlands Manor 2700 R Street, SE Washington, DC 20020 Contact: Anacostia EDC	(202) 889-5100	52	1 BR	$1,800	500	12 mos.	2004	0%	Proposed 4-story assisted living facility to be developed by the Anacostia Economic Development Corporation. 24-hour supervision and emergency services.. Subsidies of up to $1,600 per month. Private bath and lounge area in each unit, common spaces, cleaning and laundry services, meals provided in dining room, also a hair salon and physical therapy. Currently in zoning.
3. New East Capitol 58th St and East Capitol St., SE & NE Washington, DC Contact: Cheryl Hamilton, A&R	(202) 546-9033	152	1 BR	n/a	565	12 mos.	2004	0%	3-story building. Laundry room each floor, CAC, community space, full kitchen in each unit. 33 pkg spaces.
4. JW King Senior Center 4600 H Street, SE Washington DC 20019 Contact: First Rock Church Foundation		61 14 75	1 BR 2 BR	n/a	565-575 770-840	n/a	?	0%	Proposed 4-story senior housing and daycare (child and seniors) to be developed by the First Rock Church Foundation. Laundry room each floor. Central dining room, clinic, beauty/ barber shop. 46 parking spaces.

Source: The Jair Lynch Companies, 2002