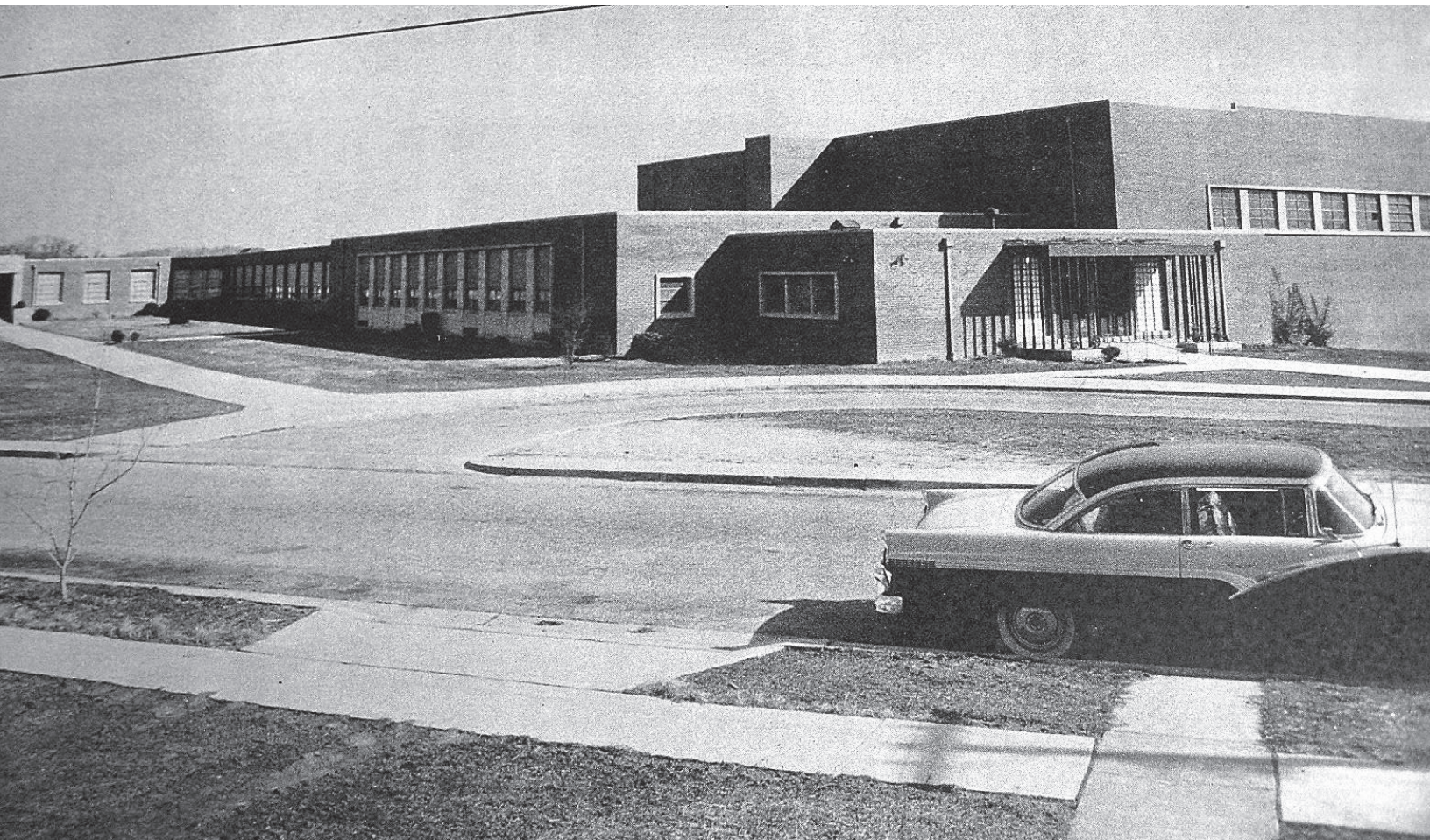


Historic Fairmont Heights High School Adaptive Reuse Economic Study



Prepared by STV and Partners for Economic Solutions for



THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION
Prince George's County Planning Department

December 2018

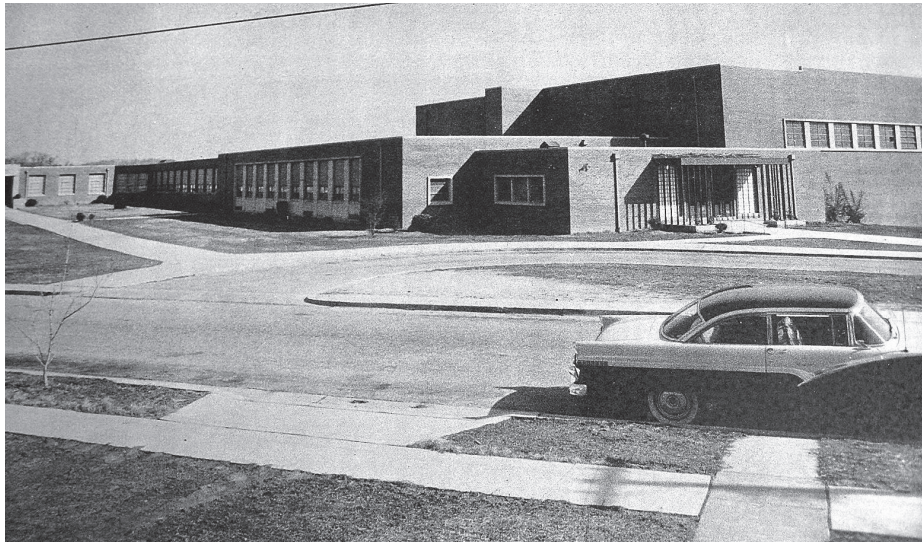
Abstract

Date	December 2018
Title	Historic Fairmont Heights High School Adaptive Reuse Economic Study
Author	The Maryland-National Capital Park and Planning Commission
Subject	Feasibility of reuse options for vacant high school
Source of copies	The Maryland-National Capital Park and Planning Commission 14741 Governor Oden Bowie Drive Upper Marlboro, MD 20772
Series number	4421920316
Number of pages	50

The 15-acre Historic Fairmont Heights High School (FHHS) Property at 1401 Nye Street in Capitol Heights, Maryland, consists of a 174,128 square-foot building, football field, baseball diamond, and parking. In 2017, Fairmont Heights High School moved to the new \$80 million, 193,000square foot building at 6501 Columbia Park Road in Landover and left the Nye Street location vacant. The Historic FHHS property offers a quiet, pleasant development site proximate to several major transportation routes and Metro stations, as well as access to shopping, recreation, and medical care.

The economic study answers preliminary questions about the demand for commercial and residential land uses and factors influencing the property's reuse potential.

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The Maryland-National Capital Park and Planning Commission**

Prince George's County Planning Department
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The Maryland-National Capital Park and Planning Commission (M-NCPPC) is a bicounty agency, created by the General Assembly of Maryland in 1927. The Commission's geographic authority extends to the great majority of Montgomery and Prince George's Counties: the Maryland-Washington Regional District (M-NCPPC planning jurisdiction) comprises 1,001 square miles, while the Metropolitan District (parks) comprises 919 square miles, in the two counties.

The Commission has three major functions:

- The preparation, adoption, and, from time to time, amendment or extension of the General Plan for the physical development of the Maryland-Washington Regional District.
- The acquisition, development, operation, and maintenance of a public park system.
- In Prince George's County only, the operation of the entire county public recreation program.

The Commission operates in each county through a Planning Board appointed by and responsible to the County government. All local plans, recommendations on zoning amendments, administration of subdivision regulations, and general administration of parks are responsibilities of the Planning Boards.

The Prince George's County Planning Department:

- Our mission is to help preserve, protect and manage the County's resources by providing the highest quality planning services and growth management guidance and by facilitating effective intergovernmental and citizen involvement through education and technical assistance.
- Our vision is to be a model planning department of responsive and respected staff who provide superior planning and technical services and work cooperatively with decision makers, citizens, and other agencies to continuously improve development quality and the environment and act as a catalyst for positive change

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The County Council has three main responsibilities in the planning process: (1) setting policy, (2) plan approval, and (3) plan implementation. Applicable policies are incorporated into area plans, functional plans, and the general plan. The Council, after holding a hearing on the plan adopted by the Planning Board, may approve the plan as adopted, approve the plan with amendments based on the public record, or disapprove the plan and return it to the Planning Board for revision. Implementation is primarily through adoption of the annual Capital Improvement Program, the annual Budget, the water and sewer plan, and adoption of zoning map amendments.

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Executive Summary

Fairmont Heights High School (FHHS) relocated in fall 2017, leaving its former property on Nye Street in Capitol Heights, Maryland. The approximately 15-acre property with 174,000 square feet of building space also includes a football field, baseball diamond, track, and surface parking lots. The historic building was vacated rather than renovated, in part, because of the costs, estimated to be \$30.6 million, according to the Prince George's County Public School's Updated Facility Condition Assessment Final Report. The Maryland-National Capital Park and Planning Commission (M-NCPPC) hired a multi-disciplinary consultant team to provide economic, traffic, and infrastructure insights to be incorporated into a feasibility study for the adaptive reuse/re-purposing of the historic FHHS property and associated campus.

The review of local and regional market factors considered the demand for a variety of uses including both residential and commercial options. Adaptive reuse of the site and current structures was considered as well as options for partial or full demolition of the school building. The initial review of demographic data analyzed population and household characteristics as well as growth patterns and the investment climate.

The site is nestled in a residential neighborhood set in a larger area dominated by large tracts of industrial land with only a few of the amenities that support residential neighborhoods. The projected growth rates for the area and increased demand for housing near transit make the site a viable location for new market-rate apartments, townhouses, and senior housing options. By the year 2022, the site could support up to 57 apartments and 60 for-sale townhouses; by 2026, the site could support up to 114 apartments and 110 for-sale townhouses. Additional affordable housing could be developed if funding became available to subsidize development costs.

Overall, the Washington regional office market, within inner-ring suburbs and outside mixed-use, amenity-rich locations, is stagnant. Only a few key suburban submarkets with a mixture of uses and activity generators are attracting new development. Two distinctive types of office space have potential at the Historic FHHS site—neighborhood-serving offices, such as those that exist along Martin Luther King, Jr. Boulevard, and offices tied directly to the presence of institutional anchors.



The projected growth rates for the area and increased demand for housing near transit make the site a viable location for new market-rate apartments, townhouses, and senior housing options.



Two distinctive types of office space have potential at the Historic FHHS site—neighborhood-serving offices, such as those that exist along Martin Luther King, Jr. Boulevard, and offices tied directly to the presence of institutional anchors.

Office tenants tend to require prominent locations, excellent access to transit and transportation corridors, proximity to high-quality retail and supportive services, state-of-the-art building systems and high-quality finishes. The historic FHHS property's residential neighborhood lacks prominence, high-quality retail, and supportive services. The property does not meet the basic site selection criteria for office development and will be unable to support newly constructed or rehabilitated office space.

Retail development requires access to customers, visibility from major thoroughfares, and sufficient daytime population to support consistent sales. Retailers have specific population density and household income spending level requirements and heavily consider nearby competition when selecting

sites. As the entire brick-and-mortar retail market continues to shrink in response to consumers' ability to access products and services online, these site selection criteria continue to weed out less competitive locations. The historic FHHS property does not meet any of the baseline retail site selection requirements.

A series of non-market uses, such as community recreation facilities, playing fields, parks, open space and day care facilities, might be viable reuse alternatives for the historic FHHS property with public/private financial support. The amount of revenue that could be generated by such uses themselves would not financially support redevelopment or reuse of the existing structures. Although these options might be highly desirable and improve the quality of life of area residents, they do not represent market-generated demand.

15
acres

Size of property
on Nye Street

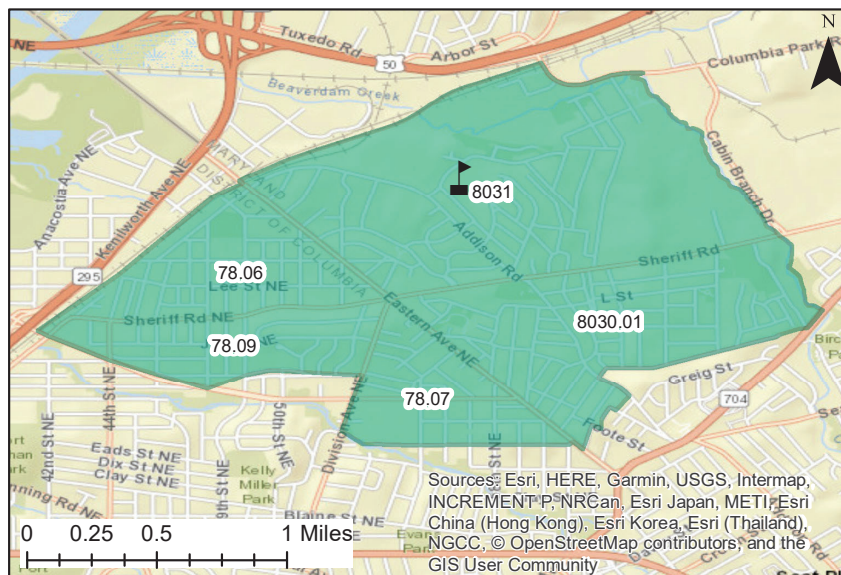
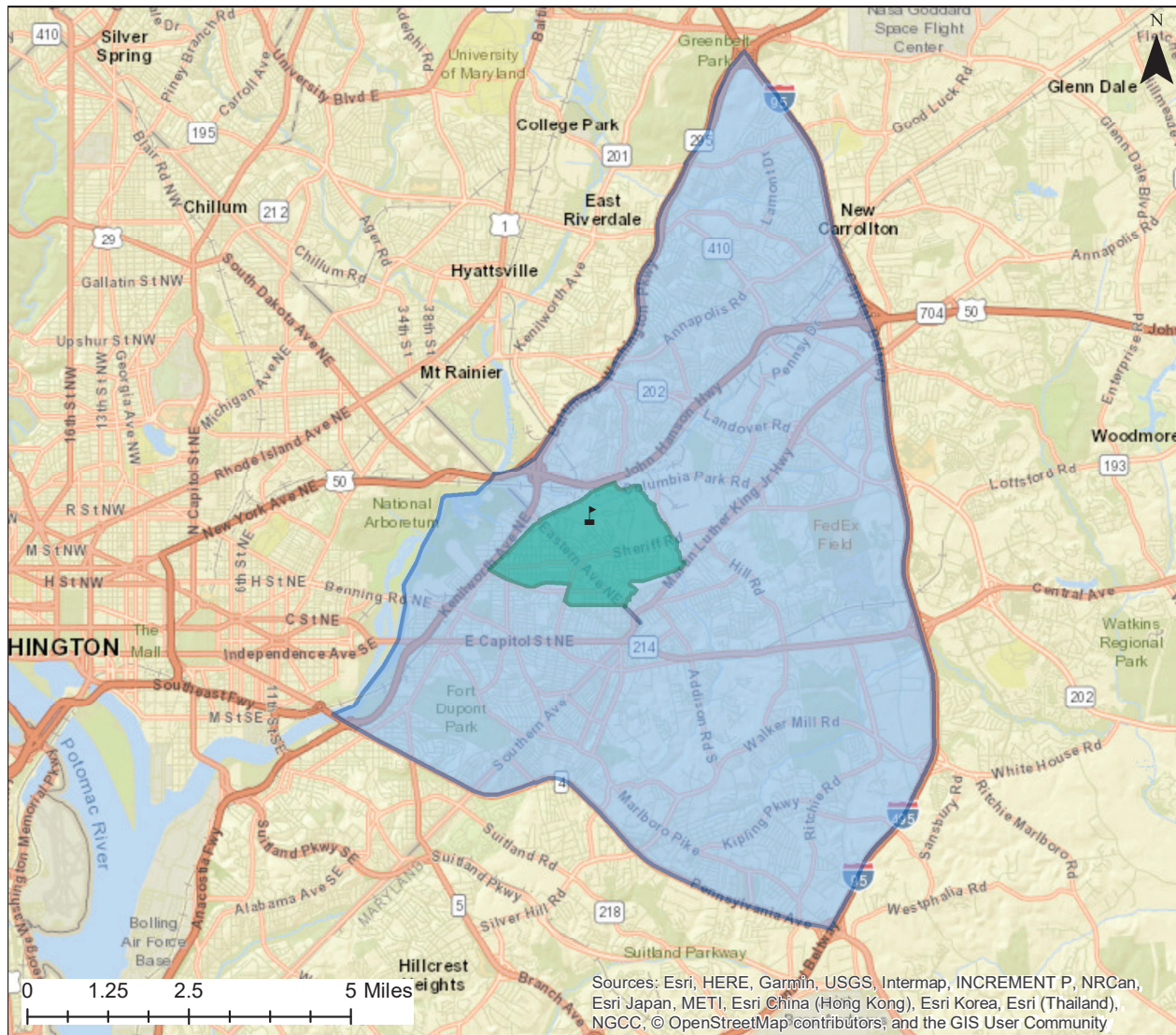
\$30.6
million

Estimated
renovation costs




174,128

Total square feet
of building space

Figure 1. Primary and Secondary Market Areas Map



Legend

-  Historic FHHS Property
-  Primary Market Area
-  Secondary Market Area

Historic FHHS Property Adaptive Reuse

Primary and Secondary Market Area Map

Real Estate and Market Factors

The analysis tests the market for supportive reuse options under three scenarios: facility reuse, partial demolition, and complete demolition. The real estate and market conditions evaluation defines the market area of the historic FHHS property, and takes into consideration natural and man-made boundaries, as well as locations of competitive properties.

Public financial investment will be necessary to defray some of the redevelopment costs associated with demolition and remediation of the property because private investors are unwilling to fully cover the costs based on future rents. These public investment costs may be shared by local, state, and federal governments. The pace and scale of supportable development will be dependent on the amount of that investment.

Demographic Analysis

Demographics provide baseline economic conditions and current health of the business environment, including population, households, income, householder age, employment, educational attainment, retail expenditures, retail sales, and other relevant indicators.

The historic FHHS site is likely to draw many of its potential residents and customers from nearby areas, referred to as the primary market area (PMA), and generally defined by five nearby U.S. Census Tracts: 8030.01, 8031.00, 78.06, 78.07, and 78.09. A larger secondary market area (SMA) extends from the Anacostia River and I-295 (Baltimore-Washington Parkway) east to I-495 (Capital Beltway), with the I-295 and I-495 interchange to the north and Pennsylvania Avenue to the south. The SMA could provide potential residents, retail customers, and other users at a lower rate than the PMA. Figure 1 shows the PMA and SMA.

POPULATION AND HOUSEHOLD TRENDS

A total of 13,525 residents live in 5,035 households in the PMA (Table 1). With the development of new subdivisions and communities, Prince George's County and the PMA have grown in population over the past decades. The SMA captures portions of the District of Columbia and Prince George's County and includes 210,539 residents. The County's population grew 7.7 percent from 2000 to 2010 and another 6.7 percent from 2010 to 2018. Over the past eight years, the PMA added 545 new residents to grow 4.2 percent,

Table 1. Population and Household Trends, 2000-2018

Year(s)	Primary Market Area ¹		Secondary Market Area ²		Prince George's County		Metro Area ³	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Population								
2000	12,212		201,717		801,473		4,837,430	
2010	12,980		199,913		863,420		5,636,232	
2018	13,525		210,539		921,366		6,196,188	
2000-2018 Change	1,313	10.8%	8,822	4.4%	119,893	15.0%	1,358,758	28.1%
2000-2010 Change	768	6.3%	(1,804)	-0.9%	61,947	7.7%	798,802	16.5%
2010-2018 Change	545	4.2%	10,626	5.3%	57,946	6.7%	559,956	9.9%
Households								
2000	4,782		73,845		286,599		1,815,193	
2010	4,910		73,373		304,042		2,094,033	
2018	5,035		76,338		319,410		2,290,756	
2000-2018 Change	253	5.3%	2,493	3.4%	32,811	11.4%	475,563	26.2%
2000-2010 Change	128	2.7%	(472)	-0.6%	17,443	6.1%	278,840	15.4%
2010-2018 Change	125	2.5%	2,965	4.0%	15,368	5.1%	196,723	9.4%

Note: ¹Primary Market Area includes five Census Tracts: 8030.01, 8031.00, 78.06, 78.07, and 78.09. ²Secondary Market Area is bordered by the Anacostia River on the east, I-295 (Baltimore-Washington Parkway) to the north, I-95 (Capital Beltway) to the east, and Pennsylvania Avenue to the south. ³ Metro area includes the District of Columbia; the cities of Alexandria, Fairfax, Falls Church, Manassas, and Manassas Park; and Arlington, Calvert, Charles, Clarke, Culpeper, Fairfax, Fauquier, Frederick, Jefferson, Loudoun, Montgomery, Prince George's, Prince William, Rappahannock, Spotsylvania, Stafford, and Warren counties.

Source: ESRI, Community Profile, 2018; Partners for Economic Solutions, 2018.

compared to 10,626 new residents, or 5.3 percent growth in the SMA. The built-out character of the PMA has contributed to the slower pace of growth. Population growth exceeded the pace of household growth in the PMA and the County because of a slight increase in the average household size.

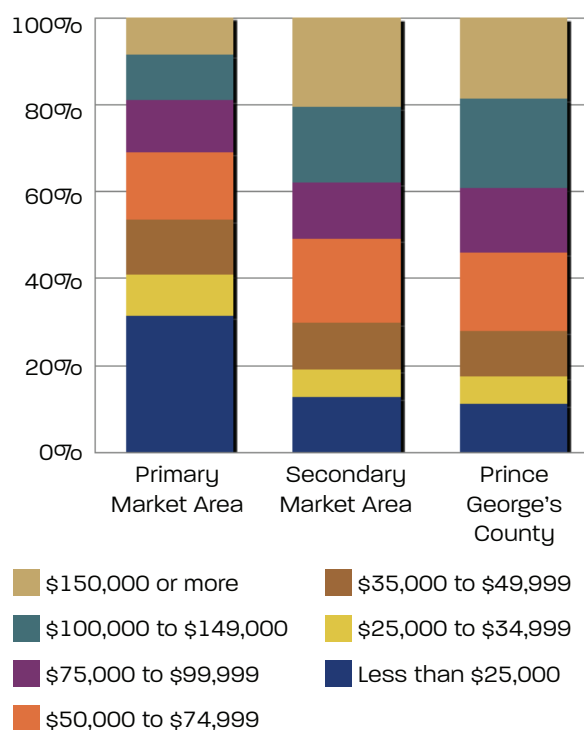
PMA residents are slightly older, having a median age of 38.4 years compared to 36.4 years Countywide and 37.4 years in the Washington Metro Region (shown in Appendix Table A-1).

Small households of only one or two people dominate the area, accounting for 58.5 percent of all PMA households. Appendix Table A-2 indicates that the proportion of households in 2010 with five or more people was 13.5 percent for the PMA, compared with 14.5 and 14.7 percent for the SMA and Prince George's County, respectively. Nearly one-third (32.1 percent) of PMA households were persons living alone, in contrast with 26.1 percent Countywide. The average household sizes in the four areas—PMA, SMA, Countywide, and Washington Metro Area—were similar, with a 2.61-person average household size in the PMA and 2.78-person average size Countywide.

One-half of householders in the PMA owned their own homes in 2018, compared to 36.8 percent in the SMA and 60.9 percent Countywide (Appendix Table A-3).

The incomes of area households are the most relevant demographic factor to housing demand. Appendix Table A-4 shows the distribution of market-area households by income in 2018. PMA households had a median household income of \$44,812, which is 44.2 percent below the Countywide median of \$80,315. The PMA had a disproportionate share of lower-income households; 31.4 percent made less than \$25,000, compared to only 12.8 percent in the SMA and 11.1 percent Countywide. The PMA also had few upper-income households—only 8.4 percent had incomes of \$150,000 or more. In contrast, one in five SMA households and 18.5 percent of households Countywide earned \$150,000 or more (Figure 2).

Figure 2. Percent of Households by Income, 2018



As shown in Appendix Table A-5, ownership rates increase with average income levels. Among PMA homeowners in 2016, 41.3 percent had incomes of \$75,000 or more. Forty-eight percent of primary market-area renters had incomes between \$25,000 and \$75,000.

In 2018, PMA residents aged 16 and older primarily worked white-collar jobs (52.4 percent); one in five residents worked in administrative support. The 22.1 percent of PMA residents who worked in blue-collar jobs tend to be employed in transportation or distribution. Many warehouse/distribution operations are located immediately east and north of the PMA. A higher proportion of residents Countywide tend to be employed in professional service jobs—22.5 percent compared to 12.6 percent in the PMA. Table 2 highlights the number of residents by employment sector.



38.4
years

Median age of
PMA residents

\$44,812

Median
household
income in the
PMA

\$80,315

Median
household
income
Countywide

Table 2. Employed Population Aged 16 and Older by Occupation, 2018

Industry/Occupation	Primary Market Area ¹		Secondary Market Area ²		Prince George's County	
	Number	Percent	Number	Percent	Number	Percent
White Collar	3,218	52.4%	55,203	55.9%	304,880	61.0%
<i>Management, Business, Financial</i>	577	9.4%	11,455	11.6%	75,970	15.2%
<i>Professional Services</i>	774	12.6%	16,195	16.4%	112,456	22.5%
<i>Sales</i>	590	9.6%	9,283	9.4%	38,985	7.8%
<i>Administrative Support</i>	1,278	20.8%	18,171	18.4%	77,469	15.5%
Services	1,566	25.5%	24,688	25.0%	105,458	21.1%
Blue Collar	1,357	22.1%	18,862	19.1%	89,465	17.9%
<i>Farming, Forestry, Fishing</i>	-	0.0%	-	0.0%	1,000	0.2%
<i>Construction, Extraction</i>	326	5.3%	4,740	4.8%	29,988	6.0%
<i>Installation, Maintenance, Repair</i>	252	4.1%	3,358	3.4%	15,994	3.2%
<i>Production</i>	166	2.7%	2,271	2.3%	11,495	2.3%
<i>Transportation, Material Moving</i>	614	10.0%	8,493	8.6%	30,988	6.2%
Total	6,142	100.0%	98,753	100.0%	499,803	100.0%

Note: ¹Primary Market Area includes five Census Tracts: 8030.01, 8031.00, 78.06, 78.07, and 78.09. ²Secondary Market Area is bordered by the Anacostia River on the east, I-295 (Baltimore-Washington Parkway) to the north, I-95 (Capital Beltway) to the east, and Pennsylvania Avenue to the south. ³ Metro area includes the District of Columbia; the cities of Alexandria, Fairfax, Falls Church, Manassas, and Manassas Park; and Arlington, Calvert, Charles, Clarke, Culpeper, Fairfax, Fauquier, Frederick, Jefferson, Loudoun, Montgomery, Prince George's, Prince William, Rappahannock, Spotsylvania, Stafford, and Warren counties.

Source: ESRI, Community Profile, 2018; Partners for Economic Solutions, 2018.

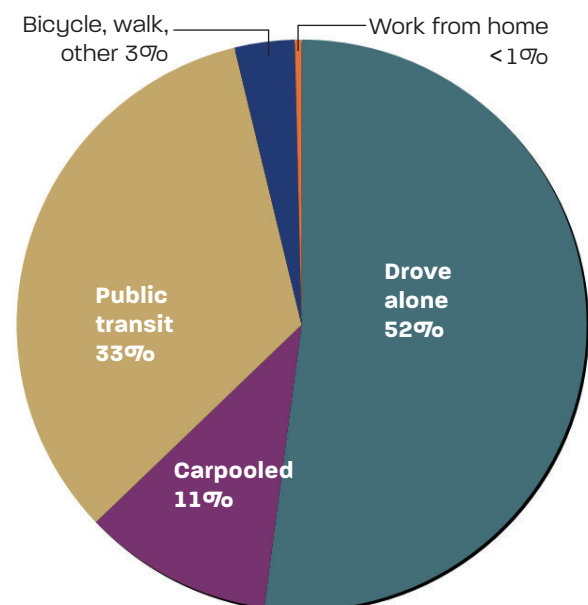
The PMA population was somewhat more transit-dependent than the County population as a whole. In 2016, one-third of workers aged 16 and older traveled to work by public transportation, compared to 16.4 percent Countywide (Appendix Table A-6).

The PMA's future population is largely dependent on its redevelopment potential. Much of the area is built out, but opportunities exist to redevelop low-density commercial uses into higher-density multifamily and mixed-use development.

ESRI, a national demographic provider, projects continued population and income growth over the next several years. Appendix Table A-7 shows future population and household incomes, anticipating an increase of 270 PMA residents and an additional 6,027 SMA residents by 2023.

SENIOR HOUSING DEMOGRAPHIC SEGMENTS

Baby boomers (born 1946 to 1964) have impacted markets since birth because of their large population in comparison to the much smaller cohort of babies born during the Great Depression and World War II.

Figure 3. Means of Transport to Work for Primary Market Area Residents, 2016

The oldest baby boomers are now 72 and many retire every year. Appendix Table A-8 provides the age breakdown of area residents.

More than 480 households within the PMA are headed by residents aged 75 and over in 2010, the last date for which this statistic is available. Given the growth in senior residents since 2010 (11.7 percent gain), this count has likely increased to almost 540 households in 2018 (Appendix Table A-9). The majority (76 percent) of senior residents 75 years or older in the PMA owned their own homes. Among the younger seniors aged 65-74 in the PMA, 66.5 percent owned their homes.

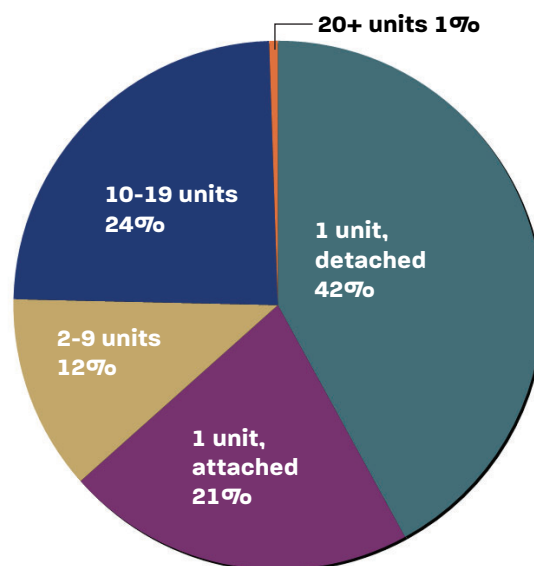
Planned Competition

The near-term development opportunities for the historic FHHS site would need support from more than the immediate neighborhood. For this reason, the analysis considered the larger context of increased development interest near the Deanwood Metro station and throughout the broader Cheverly community. The only relevant planned and proposed development underway in these areas is the Jemal Fairfield Farms property. Owned by Douglas Development, the large site received approvals for a mixed-use development with allowances for a small recreation center, such as a YMCA. The initial phase of development incorporates 321 multi-family apartments and 43,580 square feet of retail space with construction starting in early 2019. An additional 327 multifamily dwelling units could be developed after completion of the initial phase.

Residential Market Analysis

The potential for new residential development on the historic FHHS site depends on the demographic character and prospective changes in area households as well as the competition from existing and future housing stock.

Figure 4. Figure 4. PMA Housing Units by Number of Units in Structure, 2016



HOUSING STOCK

The PMA's and SMA's demographics reflect the area's housing stock. The area includes well-established single-family neighborhoods. Single-family detached houses and townhouses constitute 63 percent of the PMA housing stock; this compares with 67.4 percent of the County's housing (see Appendix Table A-10). More than 30 percent of the PMA's housing is in buildings with five or more units versus 32.6 percent in the SMA. The multifamily housing stock in northwest Prince George's County is heavily concentrated in Bladensburg and Landover along the MD 202 corridor, and near The Mall at Prince Georges, including large garden apartment complexes and myriad smaller apartment buildings.

The PMA's future population is largely dependent on its redevelopment potential. Much of the area is built out, but opportunities exist to redevelop low-density commercial uses into higher-density multifamily and mixed-use development.

Table 3. Phased Residential Development Potential on the Historic FHHS Property

Unit Type	Phase I (2019-2022)	Phase II (2023-2026)	Total
Apartments			
1 Bedroom/1 Bath	12	15	27
2 Bedroom/2 Bath	30	25	55
2 Bedroom/Den/2 Bath	15	17	32
Subtotal	57	57	114
For-sale townhouses			
2 Bedroom/2 Bath	30	25	55
3 Bedroom/2 Bath	30	25	55
Subtotal	60	50	110
Total	117	107	224

Source: Partners for Economic Solutions, 2018.

Table 4. Existing Senior Multifamily Rental Units by Number of Bedrooms, Prince George's County, 2018

Number of bedrooms	Number of units	Percent
Total inventory		
Efficiencies	40	1.0%
One Bedroom	2,804	70.3%
Two Bedrooms	1,130	28.3%
Three Bedrooms	17	0.4%
Total	3,991	100%
Units Built From 2006 Through 2018		
Efficiencies	2	0.3%
One Bedroom	238	31.0%
Two Bedrooms	510	66.5%
Three Bedrooms	17	2.2%
Total	767	100%

Note: Limited to Class A and B buildings.

Source: CoStar, 2018; Partners for Economic Solutions, 2018

Table 5. Phased Senior Residential Development Potential

Unit Type	Phase I (2019-2022)	Phase II (2023-2026)	Total
Apartments 1 Bedroom	-	30	30
Patio Homes 2 Bedrooms	-	15	15
Total	-	45	45

Source: Partners for Economic Solutions, 2018.

The PMA and SMA housing stock is relatively old; 54.7 percent of PMA units and 41.4 percent of SMA units were built before 1960. This compares to 23.6 percent of housing stock built prior to 1960 in the Washington, D.C. metropolitan area and 23.7 percent in Prince George's County. Since 2000, the PMA has added only 242 total housing units (4.2 percent of the PMA's housing stock), which are mostly near the Deanwood Metro Station while 12.9 percent (42,816 housing units) of the County's housing was built since 2000 (Appendix Table A-11).

Data from real estate analytics firm CoStar indicate that the PMA has 79 residential apartment buildings with 1,672 rental units. This multifamily housing includes both subsidized and market-rate units with average monthly rents of \$1,084 per unit or \$1.50 per square foot. In 2017, the PMA's multifamily housing stock had an average vacancy of 5.5 percent, down from 6.1 percent in 2012. This vacancy rate reflects the reasonably good health of the market as a 5.0-percent vacancy rate typically indicates a market with a good balance between supply and demand. Five-percent vacancies allow time for marketing, cleaning, and painting between tenants. The momentum to build multifamily housing throughout the Washington, D.C. region is evident—but at a slower pace in the mostly built-out, single-family PMA community—with roughly 70 units added since 2013. Only two buildings are under construction in the PMA; they will bring an estimated 333 new rental units to the market by 2019.

RESIDENTIAL POTENTIAL

The demand for market-rate housing on the historic FHHS site includes owner-occupied townhouses and rental apartments offering a short commute to Washington, D.C., jobs via two Metro stations. Unfortunately, these Metro stations are outside the half-mile transit-oriented development (TOD) area, requiring additional bus access, bicycle, or alternate modes for pedestrians. Based on the appeal of the surrounding neighborhoods, the recent development transitions in Deanwood, plans for adjacent properties, and continued aging of the senior population, the historic FHHS site could compete for these uses as well as for senior housing.

Table 3 shows the potential demand for development on the historic FHHS property through 2026, reflecting the sizes of PMA and SMA households, the potential mobility of SMA and County households, and the competition from existing and proposed developments.

Additional affordable housing could be developed if funding was available to subsidize development costs.



Senior housing operators report that most seniors are unwilling to consider moving until the death of a spouse, a physical injury, or other infirmity makes it difficult to continue living in their house.

SENIOR HOUSING POTENTIAL

Although senior independent living communities often accept residents at age 55, many people under the age of 75 consider themselves too young to live in “elderly” housing. Most homeowners who are physically and mentally able to maintain their own homes show great preference to stay there. Senior housing operators report that most seniors are unwilling to consider moving until the death of a spouse, a physical injury, or other infirmity makes it difficult to continue living in their house. Within the PMA, 1,249 residents (9.2 percent) are aged 65 to 74, and 518 residents (3.8 percent) are aged 75 to 84. Residents aged 85 and older account for 207 residents, or 1.5 percent of PMA residents. Residents older than 75 are those most likely to live in independent senior housing or assisted-living facilities. In the SMA, 28,742 residents are older than 65, including 10,809 over the age of 75. It is likely those residents within the SMA would consider senior housing options at the historic FHHS property.

Independent living communities offer housing units that include a kitchen. Although most complexes offer common areas and programming to encourage residents to stay active and engaged, most do not offer communal meal service or individual health care. Independent living differs from assisted living communities, which provide housing and support services for seniors unable to independently manage their daily activities. Services typically include help with medications, meals, and mobility. Specialized assisted living facilities serve residents with Alzheimer’s disease and other memory issues. Most coordinate residents’ medical needs with outside providers. Skilled nursing facilities provide 24-hour medical care and assistance, including medications, dressing, bathing, mobility, and physical therapy.

COMPETITIVE SENIOR HOUSING DEVELOPMENTS

Prince George’s County has 40 developments with a total of 4,804 units designated as senior housing, with 78 percent (3,731 units) of units in Class B developments (Appendix Table A-12). The classification of buildings considers the year built, level of investment, quality of finishes, amenities and features. Class A buildings typically incorporate higher-end finishes, more amenities and features with modern and periodic upgrades to the housing developments. The two Class A developments consist of 260 units built within the past three years. Class C developments tend to be quite old and not as well maintained as the Class B buildings. The inventory



The Willows in Laurel offers 75 two-bedroom units. More than 70 percent of Class A and Class B senior housing is one-bedroom units.

has grown over seven decades, to include seven Class C developments consisting of 813 units, with the oldest building dating to 1943. Most of the units were developed during the 1990s and 2000s. Table 4 provides a breakdown of senior housing units by number of bedrooms.

More than 70 percent of the Class A and B senior housing supply consists of one-bedroom units; two-bedroom units account for an additional 28 percent. Only four buildings have studio units, representing 1.0 percent of the supply. There are only 17 three-bedroom units Countywide.¹

In the past 10 years, Prince George's County has added six senior housing developments with 767 new units.

For all senior housing projects, occupancy rates have generally averaged 95 to 98 percent in recent years. The biggest variances accompanied the introduction of new units into the market. With the lack of new supply and the continued growth in the senior population over the past five years, occupancy rates have risen.

Average rents have increased since 2005 from \$895 per month to the current average of \$1,215, according to data from CoStar. In 2005, senior housing units in the County averaged 676 square feet in size. With new construction, the average has grown to 727 square feet, a 7.5-percent increase over 13 years.

Appendix Table A-12 shows the inventory of existing senior housing throughout Prince George's County. To provide a clearer picture of the developments that would compete with a newly constructed senior housing community on the historic FHHS

property, the inventory is limited to Class A and B developments. The inventory includes market-rate, rent-subsidized, and rent-restricted developments. Only three of the County's 40 senior developments are market-rate, which offer no governmental financial assistance to ensure affordability. The developments designated as rent-restricted are funded with Low-Income Housing Tax Credits, which require a percentage of units be leased at rents affordable to low- and moderate-income households. Rent-subsidized developments are funded through other federal and state affordable housing programs and typically require that all residents meet income limitations.

Amenities typically include air conditioning, fitness centers, common areas, and wheelchair-accessible rooms. Several offer a media center/movie theatre, business center, picnic area, library, lounge, planned social activities, and access to high-speed internet or WiFi. Only two have pools, which are shared with larger apartment communities. Pet accommodations are limited.

Given local incomes, it is unlikely that the historic FHHS site could support a purely market-rate community, particularly with the high costs associated with reuse or demolition of the existing structure. Available subsidy programs would make it possible for the community to serve households with a mix of incomes. Table 5 represents the potential for senior housing on the historic FHHS property. Development is recommended for the second phase to allow more SMA residents to reach 75 and the overall development to become more established.

¹ Three-bedroom units are limited by the Zoning Ordinance, §27-419.

Commercial Market Analysis

The market support for office space reflects historic absorption and development data for the region, Prince George's County, Capitol Heights, Cheverly, and the surrounding communities. The review considers both the County's and neighborhood's ability to compete for office development based on competitive advantages and disadvantages, including access, proximity to major employment centers, workforce, office environment, cost, support services, and other factors.

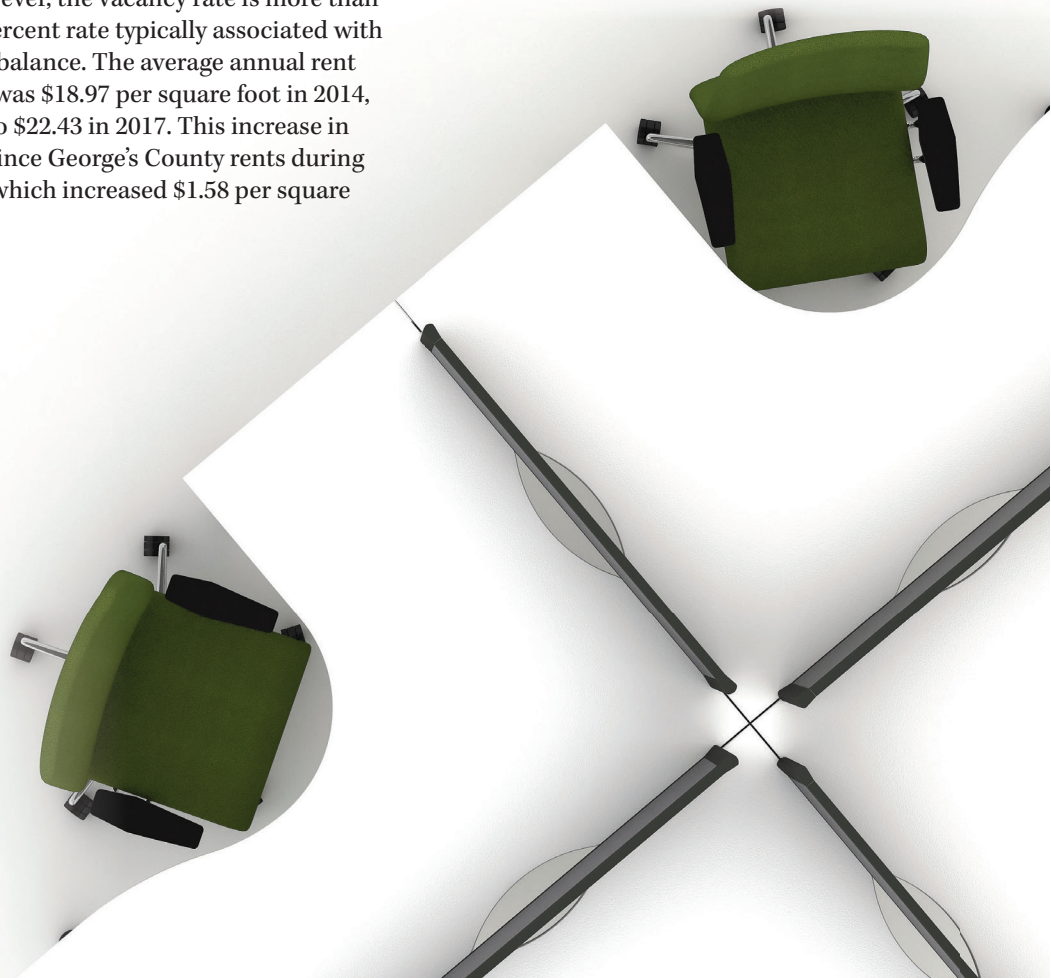
OFFICE MARKET CONDITIONS

The Landover/Largo/Capitol Heights (LLCH) office submarket, defined by CoStar, has been stagnant over the past couple of decades, generally reflecting Countywide trends. The submarket's total inventory of 3.7 million square feet of space in 128 buildings accounts for 13 percent of all Prince George's County office space. Despite a slight uptick in 2014, the submarket's vacancy rate has dropped since the 2008 peak of 27.2 percent to reach the current 19.3-percent vacancy rate. However, the vacancy rate is more than double the 8-10 percent rate typically associated with a supply-demand balance. The average annual rent in the submarket was \$18.97 per square foot in 2014, which increased to \$22.43 in 2017. This increase in rents outpaced Prince George's County rents during the same period, which increased \$1.58 per square

foot to an average of \$21.60 per square foot in 2017. Unfortunately, both the submarket's and the County's office markets lag the regional office market. The Washington, D.C., metropolitan area office market reached its highest average rent of \$34.20 per square foot in 2017. Until vacancy rates are much lower and achieved rents much higher, the development of new office space in the County will be limited to governmental and other build-to-suit structures.

One trend limiting the demand for office space in the regional market is a shift to more efficient use of space with open-floor-plan office designs that provide less space per worker, more employees using technology to work remotely, and less need for space to store paper-based files.

The PMA is mainly a residential community with minimal office space. Much of what exists is in Class C storefront space with tenants that serve the local community, including several offices developed in conjunction with warehouse and distribution



The historic FHHS property cannot effectively compete for major office tenants. The neighborhood's relatively low residential density would prevent businesses at the historic FHHS site from attracting a large enough walk-in clientele ...

space. Without significant competitive features to attract new office development, the area is not well positioned to attract Class A or Class B office users. Large corporate office tenants often locate in business parks with prominent locations, excellent access to transportation corridors, proximity to quality retail and supportive services, state-of-the-art building systems, and high-quality standard finishes. Overwhelmingly, today's major office tenants are seeking sites within one-half mile² of a Metro station to ensure easy access for workers drawn from around the region.

The popularity of flexible office space in coworking environments or shared office spaces has grown. Within the Capitol Heights community, Clout Workspace allows users to rent desks by the month or larger conference rooms/meeting space daily for training and customer outreach events. Clout Workspace charges \$79 per month for a desk and boasts its access to nearby highways, Largo Town Center, Woodmore Town Center, and other retail destinations. Flexible, coworking business spaces tend to locate near business districts or areas with a mix of commercial uses and would not find the historic FHHS property viable.

There are successful neighborhood office clusters in nearby Bladensburg, Landover, and Largo. These clusters provide space for neighborhood-related businesses (doctors, accountants, and insurance agents). Deanwood and other nearby neighborhoods offer medical clinics and smaller medical office spaces. These office tenants depend on access to their primary clientele, are often more price-sensitive than larger corporations, and tend to remain at these locations for long periods. Most often, these businesses locate in business nodes along major thoroughfares where visibility attracts clients.

The historic FHHS property, nestled within a residential neighborhood, lacks the sense of place critical to successful development of a vibrant,

mixed-use community that could attract office uses. It cannot offer visibility or support retail and other services. The historic FHHS property cannot effectively compete for major office tenants. The neighborhood's relatively low residential density would prevent businesses at the historic FHHS site from attracting a large enough walk-in clientele for successful business operations.

RETAIL MARKET CONDITIONS

In understanding retail markets, analysts sort retail goods into three main categories:

- **Neighborhood goods and services**, which serve the everyday needs of residents, including grocery stores and drugstores
- **Eating and drinking**, including fast food and sit-down restaurants and bars
- **Shoppers goods**, the types of goods sold in department stores that customers compare before buying—general merchandise, apparel and accessories, furniture and home furnishings, and other goods (also known as GAFO)

Neighborhood goods and services stores tend to attract customers within a 5- to 10-minute driving distance, while shopping centers and other shoppers goods nodes may bring customers from a 15- to 20-minute driving distance or even further.

COMPETITIVE RETAIL ENVIRONMENT

Customers choose retail opportunities for neighborhood goods and services as well as eating and drinking based on convenience to their home and workplace. To meet their shoppers goods retail needs customers will travel to locations with a cluster of stores. Typically, neighborhood shopping areas have very limited offerings of general merchandise, apparel and accessories, furniture and home furnishings, and other shoppers goods. These are goods for which most consumers comparison shop, considering choices from several clothing stores, for example. The

² Supporting Transit-Oriented Development (TOD), as defined in Maryland Transportation Code § 7-101 (2015)

Table 6. Primary Market Area Sales and Expenditures by Retail Category, 2018

NAICS	Industry Group	Demand (Retail Potential)	Primary Market Area ¹	Retail Gap
Neighborhood Goods and Services				
445	Food & Beverage Stores	\$23,239,000	\$5,363,000	\$17,876,000
4451	Grocery Stores	\$19,633,000	\$4,587,000	\$15,046,000
4452	Specialty Food Stores	\$1,283,000	\$0	\$1,283,000
4453	Beer, Wine & Liquor Stores	\$2,324,000	\$776,000	\$1,548,000
446, 4461	Health & Personal Care Stores	\$9,990,000	\$0	\$9,990,000
Total Neighborhood Goods and Services		\$33,229,000	\$5,363,000	\$27,866,000
Eating and Drinking				
722	Food Services & Drinking Places	\$13,628,000	\$3,912,000	\$9,716,000
7225	Restaurant and Eating Places	\$12,785,000	\$3,912,000	\$8,873,000
7223	Special Food Services	\$315,000	\$0	\$315,000
7224	Drinking Places - Alcoholic Beverages	\$528,000	\$0	\$528,000
Total Eating and Drinking		\$13,628,000	\$3,912,000	\$9,716,000
Shoppers Goods (GAFO)				
452	General Merchandise Stores	\$18,311,000	\$0	\$18,311,000
448	Clothing & Clothing Accessories Stores	\$9,164,000	\$0	\$9,164,000
442	Furniture & Home Furnishings Stores	\$4,879,000	\$0	\$4,879,000
443	Electronics & Appliance Stores	\$4,959,000	\$0	\$4,959,000
451	Sporting Goods, Hobby, Book & Music Stores	\$3,351,000	\$0	\$3,351,000
453	Miscellaneous Store Retailers	\$4,556,000	\$830,000	\$3,726,000
Total Shoppers Goods		\$45,220,000	\$830,000	\$44,390,000

Note: ¹Primary Market Area includes five Census Tracts: 8030.01, 8031.00, 78.06, 78.07, and 78.09.

Source: ESRI, Retail Marketplace Profile, 2018; Partners for Economic Solutions, 2018.

desire for convenient comparison shopping was the driving force in the creation of downtown business districts and shopping malls. Few neighborhood business districts can support the number and variety of stores required to offer a comparison-shopping opportunity. Both Largo and Landover offer major clusters of shoppers-goods retailers and regular and discount department stores, preempting the potential for significant shoppers-goods retailers in the PMA.

The local market is served by only eight stores within the PMA. The broader SMA has roughly 6.26 million square feet of retail space with an average annual rent of \$21 per square foot. Over the past five years, the vacancy rate reached a peak of 10.1 percent in 2014 before falling to the current 6.3-percent rate.

Within the PMA and SMA, several neighborhoods and clusters of retail activity reflect the retail development patterns led by the historical importance of auto traffic. Much of the retail stock consists of older commercial strip centers, set back from the road with an abundance of parking in front. Neighborhood shopping centers in excess of 30,000 square feet dominate the

landscape, followed by community shopping centers in excess of 100,000 square feet with a junior or discount department store as an anchor. These centers offer an array of retail types and food services. For the neighborhood centers, grocery stores or pharmacies anchor the retail destination. Larger-scale, big box community shopping centers tend to include national chains and draw a larger customer base.

The demand for retail facilities relates to sales potential, primarily based on expenditures of proximate residents. A review of the ability of area residents and future residents to support new retail space based on their spending on retail goods is shown in Table 6, which summarizes expenditures of area residents by retail category, in comparison to actual sales by area retailers. The large retail gaps shown for the PMA represent the money residents spend outside the area, often referred to as “leakage.” PMA residents leave the area to find many of the types of goods they want. They are drawn to locations with a higher concentration of the types of stores they like to frequent.

Reuse Alternatives

An initial market review of real estate conditions and economic indicators provides a series of reuse alternatives supported by the private market. Not all of the potential uses, such as the community center, can be developed privately because they don't generate enough rent or revenue to pay for the costs of construction or renovation. While demand may exist for a day care center, for example, the rents the center could pay would not be enough to attract a private developer seeking a reasonable profit. The current development economics for these uses depend on the relationship between the value of the completed development option, individual buildings or projects and the associated cost of redevelopment. The cost of redevelopment for the historic FHHS property ranges from full reuse of the land and buildings or partial reuse of only the land or only a portion of the buildings and the potential combination of a portion of the buildings and land.

This report assesses only the economic reuse potential and does not fully test financial viability. Redevelopment of any property requires sufficient potential revenues to entice developers. If a project

does not generate sufficient revenue that would provide the rate of return required by investors, the project has a "feasibility gap" or the project does not "pencil out," requiring subsidy from another source. These gaps may exist on the capital side (due to the high cost of remediation and redevelopment) as well as operational gaps resulting in the need for ongoing financial support, such as a rent subsidy.

The reuse alternatives for the building and site can be distinguished between revenue-generating and non-revenue-generating activities. These two categories reflect the ability of each use to contribute to the operating, maintenance, and renovation costs associated with the historic FHHS site and building. The general costs associated with maintaining and operating the historic FHHS property include building maintenance, landscaping, utilities, and insurance. These are overhead costs that apply to all the use alternatives.



Table 7. Revenue and Non-Revenue Generating Reuse Options, 2018

Options	Revenue Generating	Subsidy Required	Activity Generation	
			Amount	Duration
For-Sale Residential	X		Low	Continuous
Rental Residential	X		Low	Continuous
Senior Housing	X		Low	Continuous
Daycare Operations	X		Low	Continuous
Festivals		X	High	Periodic
Recreation Fields		X	High	Continuous
Recreation Bike Paths		X	Moderate	Continuous

Source: Partners for Economic Solutions, 2018.

- **Revenue-generating uses** include private or public-private commercial uses that can pay direct operating costs and generate some additional revenue. However, none of the uses would be enough to fund the high price of remediation and demolition associated with preparing the building or the property for reuse. The scale of those costs is well beyond the capacity of the viable reuse alternatives to fund. The Prince George's County Public School's Updated Facility Condition Assessment Final Report (Parsons, September 2012) estimated the cost of bringing the building up to code at \$30.6 million. Partners for Economic Solutions estimated demolition of the building would likely cost \$1.5 to \$2.0 million. Those costs would need to be paid from public investment, grants, or a funding source other than the operator or user. Revenues generated from these uses through such a sale or lease of a portion of the property, could offset some of the capital costs; however, it is more likely that these revenues will be needed for ongoing maintenance costs of the larger historic FHHS property.
- **Non-revenue-generating uses** include those able to pay direct operational or programmatic costs (whether through use fees, philanthropic funding, or other sources) but not able to fund initial capital costs and/or the overhead costs of managing and operating the portion of the site or buildings they occupy. Such uses as music or arts festivals, biking trails, community centers, or recreational fields require government subsidy or partnership structures to fill the financial gap. While such uses contribute significantly to enhancing area residents' quality of life, they would not contribute to the financial feasibility of reuse.

The revenue-generating uses with the highest potential for the historic FHHS property are senior housing and for-sale housing. To serve the local population, affordable housing also could be developed if subsidy funding were available. Use of federal and state housing tools, such as Low-Income Housing Tax Credits, as well as philanthropic contributions may be necessary to fund rental and senior housing. Affordable housing developers may be interested in partnering with Prince George's County or may independently construct and operate an affordable housing development. The developer could pay for the land or enter into a long-term lease arrangement that would generate some revenues for the overall redevelopment.

Community outreach provided a list of reuse ideas for the site and/or existing building, including a day care center and a community and senior center. These are all non-revenue generating alternatives that would require capital and on-going operating subsidies. There is a shortage in the Washington, D.C., metro region of day care operations for children under the age of 3. On average, day care centers require 6,000 to 10,000 square feet of space depending on programming and area-specific demand. Much like affordable housing, the demand far exceeds the supply. Private operations prefer locations within easy walking distance to transit and commercial visibility so as to support higher fees. However, a daycare center may be viable at the historic FHHS property as a tenant within a newly constructed residential or civic building if the capital costs and rent were subsidized. Demand for community and senior centers or other recreational programmatic space needs to be evaluated in a larger study of the area's current capacity, including a profile of existing M-NCPPC facilities and programs within houses of worship in the community. Table 7 characterizes a variety of building and site reuse options and their ability to generate activity on the site.

Infrastructure

As part of this feasibility study, STV obtained utility drawings from the local jurisdiction and utility providers to determine the availability of various utility systems. In future phases of the project, the availability of utilities should be field-verified, and a capacity analysis should be performed to better understand any necessary upgrades.

Existing Utilities

The historic FHHS location, at 1401 Nye Street, has utilities surrounding the site. Appendix B provides plans of the existing public utilities.

- **Water:** Water mains exist on every side of the site.
- **Sanitary Sewer:** Sanitation mains exist on every side of the site and there are accessible sanitary manholes around the property.
- **Storm Drain:** Storm drains exist at the northwest end of Nye Street, in N Englewood Drive.
- **Electrical (PEPCO):** There is existing overhead electric service in N Englewood Drive and Nye Street.
- **Gas (Washington Gas):** There is existing gas service (20 pounds per square inch) located in Nye Street, originating from the intersection of N Englewood Drive and Nye Street. The Washington Gas maps do not show gas service in N Englewood Drive.

Developers Responsibility

To obtain utility connections the developer/applicant will need to work with private and public utility providers. For a potential developer to obtain service from PEPCO for electric and Washington Gas (WGL) for gas, an applicant must submit the appropriate service request applications. PEPCO and WGL will

assign a representative to the project and provide a plan showing where power and gas is drawn from and confirming the number of transformers required for a project. The applicant works with PEPCO, WGL, and the County to ensure sufficient conduit is available for the services requested.

The applicant would also work with the Prince George's County Department of Permitting, Inspections and Enforcement (DPIE) and the Washington Suburban Sanitary Commission (WSSC) during the preparation of plans for the public utility connections. This includes obtaining fire flow tests and sanitary capacity confirmation; and providing the stormwater management analysis with the proposed connections to public utilities.

Any improvements (utilities, roadway, sidewalks, bike paths, planting) in the public right-of-way would be reviewed by the Site/Road Plan Review Division of DPIE. This includes conduit for electric lines and gas mains. The Site/Road Plan review would include the engineering documents/plans, agreement and bonds that are approved by the County agencies to allow a private developer to construct in the public right-of-way. The Site/Road Plan Division reviews public and private improvements as part of the County development review and approval process. This effort would be the developer's responsibility.

Stormwater Management (SWM) Assessment

To determine the stormwater management (SWM) requirements for a project, the reviewing agency must first be identified. Since the project is within Prince George's County, the SWM plan will either be reviewed by DPIE and the Prince George's County Soil Conservation District (PGSCD), or if state of federal

Table 8. Existing utilities

Location	Water	Sanitary Sewer	Storm Drain	Electrical
Nye Street	8" ductile iron	8" plain concrete	Reinforced concrete pipe, unknown size.	Allowable_PV-kW 750
N Englewood Drive	8" ductile iron with 6" ductile iron service into north parking lot	8" plain concrete	Reinforced concrete pipe, unknown size.	Allowable_PV-kW 750
Englewood Avenue	8" ductile iron	8" vitrified clay		
Eastern Property line	8" ductile iron and 6" ductile iron service into track area and Dunbar Oaks Drive	8" poly vinyl chloride		

The SWM requirements for redevelopment projects are less burdensome to create an incentive for developers to only use previously developed lands.

funding is involved with a project, by the Maryland Department of the Environment (MDE).

Regardless of which agency reviews the project, there are two distinct sets of requirements for SWM depending on the percent of existing impervious coverage within the project site. If less than 40 percent of the site is covered by impervious surfaces, then new development criteria apply. If the site is equal to or covered by more than 40 percent impervious surfaces, then redevelopment criteria apply.

The historic FHHS property is more than 40 percent impervious area (52 percent impervious); therefore, the redevelopment criteria apply if the entire site is redeveloped or within a limit of disturbance (LOD).

The SWM requirements for redevelopment projects are less burdensome to create an incentive for developers to only use previously developed lands. In general, these criteria lead to less costly SWM treatment and site design with fewer structures.

The specific requirements for redevelopment are that the project must reduce impervious area by at least 50 percent, implement environmental site design (ESD) to the maximum extent practicable (MEP) to provide water quality treatment for the 50 percent remaining impervious area, or use a combination of impervious area reduction and ESD to provide water quality treatment for at least 50 percent of the existing impervious area. Additional SWM must be provided for any net increase in impervious surface.

Figure 5. Existing and Potential Connectivity



Transportation Systems

Based on the economic analysis of the subject site, as shown in Table 3 and Table 5, the following are the combined revenue generating potential uses by 2026:

- 114 apartments
- 110 townhouses
- 45 senior housing units

In addition to the revenue generating uses, potential community uses that would require subsidies include recreation fields or a day care center. The 9th Edition of the Institute of Transportation Engineers (ITE) Trip Generation Manual, provides industry standard rates to calculate trip generation for a variety of different uses based on square footage, and was used to project trips for the residential and day care uses, as shown in Table 9. It should be noted that recreation fields are not anticipated to generate significant trips during typical weekday peak vehicular hours, since use would typically be during off-peak hours or weekends. Additionally, while the average day care center size is 6,000-10,000 square feet, the ITE Trip Generation Manual indicates that the average size of the day care centers that were studied to determine peak-hour trip rates was much smaller at approximately 4,500 square feet. As such, a 6,000-square-foot facility was assumed to more realistically project weekday peak hour trips.

Existing and Future Traffic

Traffic count data from June 2017 was available from the Addison Row Traffic Impact Analysis (TIA) report for six intersections along Addison Road. These counts were conducted while schools were in session, before FHHS relocated. The Addison Row development is west of the subject site on the north side of Addison Road between Doewood Lane and Englewood Drive. The total traffic conditions from the Addison Row TIA were used as the base volumes

Table 10. Critical Lane Volumes Future Projection with Historic FHHS Redevelopment

Eastern Avenue at Addison Road Intersection	AM		PM	
	CLV	LOS ¹	CLV	LOS
Base Traffic (Total Traffic from Addison Row TIA)	1,464	E	1,213	C
Total Traffic with Historic FHHS property Redevelopment	1,524	E	1,282	C

¹ Level of Service (LOS), as defined by the Highway Capacity Manual, is a quantitative stratification of a performance measure or measures that represents quality of service, measured on an A through F scale, with LOS A representing the best operating conditions from the traveler's perspective and LOS F the worst.

Source: STV, 2018

to determine if the existing traffic network could support trips generated by the redevelopment of the historic FHHS property. These base volumes are conservative because the former FHHS was still in use when the counts were conducted and have not been reduced to reflect the closure of the school.

Under the Addison Row TIA total traffic conditions, all study intersections along Addison Road are projected to operate under the critical lane volumes (CLV) threshold of 1,600. The Eastern Avenue at Addison Road intersection is projected to operate with the highest CLV of the analyzed intersections: 1,464 during the morning peak hour.

The site trips for the historic FHHS redevelopment were assigned to the Eastern Avenue at Addison Road intersection based on the distributions for development presented in the Addison Row TIA. The Addison Row TIA assumed that 55 percent of residential site traffic would travel through the

Table 9. Historic FHHS Site – Potential Uses Trip Generation

Land Use	ITE Code*	Size	AM			PM		
			In	Out	Total	In	Out	Total
Apartments	220	114 Units	12	48	60	52	28	80
Townhomes	230	110 Units	10	46	56	44	21	65
Senior Housing	252	45 Units	3	6	9	6	6	12
Day Care	565	6,000 SF	39	34	73	35	39	74
Total			64	134	198	137	94	231

* The ITE Trip Generation Manual defines land uses by a three-digit code.

Source: STV, 2018

Eastern Avenue at Addison Road intersection. This intersection was chosen for further evaluation as it was projected to operate closest to the CLV threshold without the redevelopment of the subject site. The CLV was recalculated for this intersection assuming the buildout of the potential residential and day care uses. Table 10 compares the Addison Row TIA total traffic results with the added trips generated in Table 9.

The Eastern Avenue at Addison Road intersection would continue to operate below the 1,600 CLV threshold during peak hours with the redevelopment of the historic FHHS property. Therefore, traffic associated with the redevelopment of the historic FHHS property with the potential uses is not anticipated to adversely affect the roadway network.

Existing and Future Connectivity

Two Metro stations, Deanwood and Cheverly, are within a one-mile radius of the historic FHHS site. Existing pedestrian infrastructure along Addison Road and Minnesota Avenue could be used to walk/bike to Deanwood Metro Station to the southwest. The walking distance to Deanwood Metro Station from the subject site is approximately 0.9 mile and would take an estimated 17 minutes. Sidewalks are present along Englewood Drive, State Street, and 64th Avenue and could be used to access Cheverly Metro Station to the north. This walking path is estimated to be 1.1 miles long and would take 22 minutes to walk from the subject site. The existing pedestrian/bicycle routes to the Deanwood and Cheverly Metro Stations are shown in Figure 5 in orange and purple, respectively.

A proposed trail would connect the subject site and Cheverly Metro Station through Edgewood

Avenue and the Metro access road. This route is estimated to be 0.6-mile long and take 11 minutes to walk. However, this alignment would require the acquisition of private property between Englewood Drive and the Cheverly Metro Station, and would require a bridge to be built over Beaverdam Creek. Alternatively, there are power lines between Jutewood Avenue and the Metro access road, as shown in red in Figure 5, indicating that there may be available right-of-way at this location. Constructing a trail using this existing right-of-way would reduce the walking distance to Cheverly Metro Station from 1.1 miles to 0.75 mile, potentially increasing the modal split available to future residents of the subject site in a more cost-effective manner than proposed in the sector plan. This alignment would also require a bridge to cross Beaverdam Creek.

An existing WMATA bus line (V14) has stops on Addison Road, which provide access to Deanwood Metro Station, Addison Road-Seat Pleasant Metro Station, and the District Heights area. This bus line operates with 20-25-minute headways during the morning and evening peak hours. A bus stop for the northbound route toward Deanwood Metro Station is on the north side of Addison Road east of Englewood Drive, approximately 0.1-mile walking distance from the subject site. A bus stop for the southbound route toward the Addison Road-Seat Pleasant Metro Station and the District Heights area is located on the south side of Addison Road west of Englewood Drive, approximately 0.15-mile walking distance from the subject site. This existing connectivity to both bus and Metro options would provide further incentive for future residents of the subject site to use transit, potentially increasing the modal split within the area.



2
Metro stations
within one-mile
radius of the site

17 minutes
Estimated walking
time to the
Deanwood
Metro Station

22 minutes
Estimated walking
time to the
Cheverly
Metro Station



Conclusions

The preliminary market findings suggest that the reuse or redevelopment of the historic FHHS property will require multiple phases with a mixture of uses and several sources of public and private funding. Private developer investment is unlikely to cover the major costs of building renovation or demolition. Sale of vacant land could offset a small portion of those costs. Typically, attracting private developer interest for such a major endeavor would require significant potential returns from higher-density development at high rents and prices. Most such investments focus on areas with distinctive advantages that distinguish them from “greenfield” developments because new development on vacant land is typically much easier. Building new structures allows the developer to customize the facilities to meet customer preferences and develop a more energy-efficient and sustainable building at a lower cost than adapting an existing structure. Taking on the challenges of redevelopment typically happens in places with unique accessibility advantages (e.g., near a transit station or highway interchange) or with empty buildings well suited for adaptive reuse.

Transforming the historic school property into a competitive and vibrant destination would require

redevelopment to accommodate active uses. However, other competitive commercial developments within the immediate PMA and SMA offer superior options for near- to mid-term demand. Such active uses would be unlikely to locate on the historic FHHS property.

The untapped real estate potential for infill residential development could be attributed to the strength of the surrounding residential communities and easy access via highway. Unfortunately, the two Metro stations are outside the natural half-mile radius that most commuters are willing to walk, limiting the value of Metro proximity.

Although the analysis indicates limited near-term demand for new residential and some civic-related uses on the historic FHHS property, most of the uses would require significant public investment by the County or State.

A number of significant, catalytic opportunities could “change the game” in terms of the site’s market potential, including substantial demolition of the existing non-historic portion of the school building and site remediation and significant trails or other pedestrian/bicycle path improvements that improve connectivity to the Metro stations.

Appendix A

Tables

Table A-1. Population by Age, 2018

Age(s)	Primary Market Area ¹		Secondary Market Area ²		Prince George's County		Metro Area ³	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
0 to 19 Years	3,393	25.1%	57,275	27.2%	235,150	25.5%	1,553,505	25.1%
20 to 24 Years	910	6.7%	14,213	6.8%	68,937	7.5%	392,474	6.3%
25 to 34 Years	1,917	14.2%	30,809	14.6%	138,320	15.0%	931,659	15.0%
35 to 44 Years	1,615	11.9%	26,613	12.6%	123,394	13.4%	870,623	14.1%
45 to 54 Years	1,814	13.4%	26,635	12.7%	121,681	13.2%	844,148	13.6%
55 to 64 Years	1,902	14.1%	26,252	12.5%	114,196	12.4%	781,073	12.6%
65 to 74 Years	1,249	9.2%	17,933	8.5%	75,793	8.2%	506,359	8.2%
75 to 84 Years	518	3.8%	8,066	3.8%	32,674	3.5%	221,935	3.6%
85 Years and over	207	1.5%	2,743	1.3%	11,221	1.2%	94,412	1.5%
Total	13,525	100.0%	210,539	100.0%	921,366	100.0%	6,196,188	100.0%
Median Age	38.4		36.1		36.4		37.4	

Note: ¹Primary Market Area includes five Census Tracts: 8030.01, 8031.00, 78.06, 78.07, and 78.09. ²Secondary Market Area is bordered by the Anacostia River on the east, I-295 (Baltimore-Washington Parkway) to the north, I-95 (Capital Beltway) to the east, and Pennsylvania Avenue to the south. ³ Metro area includes the District of Columbia; the cities of Alexandria, Fairfax, Falls Church, Manassas, and Manassas Park; and Arlington, Calvert, Charles, Clarke, Culpeper, Fairfax, Fauquier, Frederick, Jefferson, Loudoun, Montgomery, Prince George's, Prince William, Rappahannock, Spotsylvania, Stafford, and Warren counties.

Source: ESRI, Community Profile, 2018; Partners for Economic Solutions, 2018.

Table A-2. Households by Size, 2010

Number of people	Primary Market Area ¹		Secondary Market Area ²		Prince George's County		Metro Area ³	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
1 Person	1,577	32.1%	21,557	29.4%	79,375	26.1%	564,320	26.9%
2 People	1,295	26.4%	19,511	26.6%	85,120	28.0%	631,453	30.2%
3 People	829	16.9%	12,850	17.5%	53,611	17.6%	346,210	16.5%
4 People	545	11.1%	8,799	12.0%	41,051	13.5%	299,770	14.3%
5 People	327	6.7%	5,227	7.1%	22,914	7.5%	143,550	6.9%
6 People	158	3.2%	2,722	3.7%	11,200	3.7%	60,823	2.9%
7+ People	179	3.6%	2,705	3.7%	10,771	3.5%	47,907	2.3%
Total Households	4,910	100.0%	73,371	100.0%	304,042	100.0%	2,094,033	100.0%
Average Size	2.61		2.71		2.78		2.64	

Note: ¹Primary Market Area includes five Census Tracts: 8030.01, 8031.00, 78.06, 78.07, and 78.09. ²Secondary Market Area is bordered by the Anacostia River on the east, I-295 (Baltimore-Washington Parkway) to the north, I-95 (Capital Beltway) to the east, and Pennsylvania Avenue to the south. ³ Metro area includes the District of Columbia; the cities of Alexandria, Fairfax, Falls Church, Manassas, and Manassas Park; and Arlington, Calvert, Charles, Clarke, Culpeper, Fairfax, Fauquier, Frederick, Jefferson, Loudoun, Montgomery, Prince George's, Prince William, Rappahannock, Spotsylvania, Stafford, and Warren counties.

Source: ESRI, Community Profile, 2018; Partners for Economic Solutions, 2018.

Table A-3. Households by Tenure, 2000-2018

Tenure	Owner versus renter	Primary Market Area ¹		Secondary Market Area ²		Prince George's County		Metro Area ³	
		Number	Percent	Number	Percent	Number	Percent	Number	Percent
2000	Owner	2,676	56.0%	39,291	53.2%	191,002	66.6%	1,157,071	63.7%
	Renter	2,106	44.0%	34,554	46.8%	95,597	33.4%	658,122	36.3%
2010	Owner	2,552	52.0%	39,065	38.1%	191,002	62.8%	1,347,855	64.4%
	Renter	2,358	48.0%	34,308	61.9%	113,040	37.2%	746,178	35.6%
2018	Owner	2,504	49.7%	39,217	36.8%	194,583	60.9%	1,429,115	62.4%
	Renter	2,531	50.3%	37,121	63.2%	124,827	39.1%	861,641	37.6%

Note: ¹Primary Market Area includes five Census Tracts: 8030.01, 8031.00, 78.06, 78.07, and 78.09. ²Secondary Market Area is bordered by the Anacostia River on the east, I-295 (Baltimore-Washington Parkway) to the north, I-95 (Capital Beltway) to the east, and Pennsylvania Avenue to the south. ³ Metro area includes the District of Columbia; the cities of Alexandria, Fairfax, Falls Church, Manassas, and Manassas Park; and Arlington, Calvert, Charles, Clarke, Culpeper, Fairfax, Fauquier, Frederick, Jefferson, Loudoun, Montgomery, Prince George's, Prince William, Rappahannock, Spotsylvania, Stafford, and Warren counties.

Source: ESRI, 2018; Partners for Economic Solutions, 2018.

Table A-4. Households by Income, 2018

Household Income	Primary Market Area ¹		Secondary Market Area ²		Prince George's County		Metro Area ³	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Less than \$25,000	1,581	31.4%	3,050	12.8%	35,547	11.1%	242,328	10.6%
\$25,000 to \$34,999	485	9.6%	1,497	6.3%	19,922	6.2%	109,347	4.8%
\$35,000 to \$49,999	629	12.5%	2,579	10.8%	34,234	10.7%	181,527	7.9%
\$50,000 to \$74,999	792	15.7%	4,573	19.2%	57,188	17.9%	322,185	14.1%
\$75,000 to \$99,999	597	11.9%	3,089	12.9%	47,779	15.0%	294,723	12.9%
\$100,000 to \$149,999	529	10.5%	4,192	17.6%	65,771	20.6%	475,142	20.7%
\$150,000 or more	422	8.4%	4,875	20.4%	58,968	18.5%	665,469	29.1%
Total	5,035	100.0%	23,855	100.0%	319,409	100.0%	2,290,721	100.0%
Median Household Income	\$44,812		\$76,410		\$80,315		\$99,481	

Note: ¹Primary Market Area includes five Census Tracts: 8030.01, 8031.00, 78.06, 78.07, and 78.09. ²Secondary Market Area is bordered by the Anacostia River on the east, I-295 (Baltimore-Washington Parkway) to the north, I-95 (Capital Beltway) to the east, and Pennsylvania Avenue to the south. ³ Metro area includes the District of Columbia; the cities of Alexandria, Fairfax, Falls Church, Manassas, and Manassas Park; and Arlington, Calvert, Charles, Clarke, Culpeper, Fairfax, Fauquier, Frederick, Jefferson, Loudoun, Montgomery, Prince George's, Prince William, Rappahannock, Spotsylvania, Stafford, and Warren counties.

Source: U.S. Census Bureau, 2016 American Community Survey (ACS); Partners for Economic Solutions, 2018.

Table A-5. Population by Age, 2018

Household Income	Primary Market Area ¹				Secondary Market Area ²			
	Owner		Renter		Owner		Renter	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Less than \$25,000	361	15.0%	1,038	40.0%	5,004	12%	12,933	32.5%
\$25,000 to \$34,999	182	7.6%	348	13.4%	2,582	6.3%	5,332	13.4%
\$35,000 to \$49,999	292	12.2%	419	16.1%	4,936	12.1%	6,761	17.0%
\$50,000 to \$74,999	573	23.9%	469	18.1%	8,691	21.3%	7,154	18.0%
\$75,000 to \$99,999	473	19.7%	100	3.9%	6,669	16.3%	3,696	9.3%
\$100,000 to \$149,999	380	15.8%	115	4.4%	8,138	19.9%	2,980	7.5%
\$150,000 or more	138	5.8%	107	4.1%	4,774	11.7%	921	2.3%
Total	2,399	100.0%	2,596	100.0%	40,794	100.0%	39,777	100.0%

Household Income	Prince George's County		Metro Area ³	
	Owner Percent	Renter Percent	Owner Percent	Renter Percent
Less than \$25,000	6.9%	20.2%	5.7%	20.4%
\$25,000 to \$34,999	4.4%	10.5%	3.4%	8.8%
\$35,000 to \$49,999	8.0%	16.9%	6.1%	12.7%
\$50,000 to \$74,999	16.9%	23.0%	12.5%	19.1%
\$75,000 to \$99,999	15.7%	13.2%	12.6%	13.3%
\$100,000 to \$149,999	24.5%	11.8%	23.0%	15.2%
\$150,000 or more	23.6%	4.4%	36.6%	10.5%
Total	100.0%	100.0%	100.0%	100.0%

Note: ¹Primary Market Area includes five Census Tracts: 8030.01, 8031.00, 78.06, 78.07, and 78.09. ²Secondary Market Area is bordered by the Anacostia River on the east, I-295 (Baltimore-Washington Parkway) to the north, I-95 (Capital Beltway) to the east, and Pennsylvania Avenue to the south. ³ Metro area includes the District of Columbia; the cities of Alexandria, Fairfax, Falls Church, Manassas, and Manassas Park; and Arlington, Calvert, Charles, Clarke, Culpeper, Fairfax, Fauquier, Frederick, Jefferson, Loudoun, Montgomery, Prince George's, Prince William, Rappahannock, Spotsylvania, Stafford, and Warren counties.

Source: ESRI, Community Profile, 2018; Partners for Economic Solutions, 2018.

Table A-6. Means of Transportation to Work for Employed Residents Age 16 and Over, 2016

Means of transportation	Primary Market Area ¹		Secondary Market Area ²		Prince George's County		Metro Area ³	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Car, Truck, or Van	3,583	62.8%	19,970	61.3%	358,339	77.5%	2,392,832	75.6%
<i>Drove alone</i>	2,971	52.1%	16,760	51.4%	304,945	65.9%	2,085,973	65.9%
<i>Carpooled</i>	612	10.7%	3,210	9.8%	53,394	11.5%	306,859	9.7%
Public Transportation (excluding taxicab)	1,904	33.4%	9,544	29.3%	75,999	16.4%	443,870	14.0%
Walked	89	1.6%	1,023	3.1%	9,549	2.1%	104,164	3.3%
Taxicab, Motorcycle, Bicycle, Other	105	1.8%	539	1.7%	5,779	1.2%	59,997	1.9%
Worked from Home	22	0.4%	1,522	4.7%	12,966	2.8%	163,853	5.2%
Total	5,703	100.0%	32,598	100.0%	462,632	100.0%	3,164,716	100.0%

Note: ¹Primary Market Area includes five Census Tracts: 8030.01, 8031.00, 78.06, 78.07, and 78.09. ²Secondary Market Area is bordered by the Anacostia River on the east, I-295 (Baltimore-Washington Parkway) to the north, I-95 (Capital Beltway) to the east, and Pennsylvania Avenue to the south. ³ Metro area includes the District of Columbia; the cities of Alexandria, Fairfax, Falls Church, Manassas, and Manassas Park; and Arlington, Calvert, Charles, Clarke, Culpeper, Fairfax, Fauquier, Frederick, Jefferson, Loudoun, Montgomery, Prince George's, Prince William, Rappahannock, Spotsylvania, Stafford, and Warren counties.

Source: U.S. Census Bureau, 2016 American Community Survey (ACS); Partners for Economic Solutions, 2018.

Table A-7. Population and Household Income Projections, 2018-2023

Year(s)	Primary Market Area ¹	Secondary Market Area ²	Prince George's County	Metro Area ³
Population				
2018	13,525	210,539	921,366	6,196,188
2023	13,795	216,566	956,103	6,558,844
2018- 2023 Annual Change	0.40%	0.6%	0.74%	1.14%
Household income				
2018	\$44,812	\$54,285	\$80,315	\$99,481
2023	\$51,169	\$60,716	\$92,140	\$108,919
2018-2023 Annual Change	2.69%	2.26%	2.79%	1.83%

Note: ¹Primary Market Area includes five Census Tracts: 8030.01, 8031.00, 78.06, 78.07, and 78.09. ²Secondary Market Area is bordered by the Anacostia River on the east, I-295 (Baltimore-Washington Parkway) to the north, I-95 (Capital Beltway) to the east, and Pennsylvania Avenue to the south. ³ Metro area includes the District of Columbia; the cities of Alexandria, Fairfax, Falls Church, Manassas, and Manassas Park; and Arlington, Calvert, Charles, Clarke, Culpeper, Fairfax, Fauquier, Frederick, Jefferson, Loudoun, Montgomery, Prince George's, Prince William, Rappahannock, Spotsylvania, Stafford, and Warren counties.

Source: ESRI, Community Profile, 2018; Partners for Economic Solutions, 2018.

Table A-8. Population by Age, 2018

Age	Primary Market Area¹					
	2010		2018		2023	
	Number	Percent	Number	Percent	Number	Percent
0 to 19 Years	3,642	28.1%	3,393	25.1%	3,402	24.7%
20 to 24 Years	943	7.3%	910	6.7%	744	5.4%
25 to 34 Years	1,605	12.4%	1,917	14.2%	1,942	14.1%
35 to 44 Years	1,725	13.3%	1,615	11.9%	1,732	12.6%
45 to 54 Years	2,012	15.5%	1,814	13.4%	1,720	12.5%
55 to 64 Years	1,577	12.1%	1,902	14.1%	1,889	13.7%
65 to 74 Years	827	6.4%	1,249	9.2%	1,481	10.7%
75 to 84 Years	433	3.3%	518	3.8%	678	4.9%
85 Years and Over	216	1.7%	207	1.5%	207	1.5%
Total Population	12,980	100.0%	13,525	100.0%	13,795	100.0%
Median Age	36.8		38.4		39.5	
Age	Secondary Market Area²					
	2010		2018		2023	
	Number	Percent	Number	Percent	Number	Percent
0 to 19 Years	59,185	29.6%	57,275	27.2%	57,829	26.7%
20 to 24 Years	14,164	7.1%	14,213	6.8%	13,106	6.1%
25 to 34 Years	27,875	13.9%	30,809	14.6%	30,972	14.3%
35 to 44 Years	26,781	13.4%	26,613	12.6%	28,920	13.4%
45 to 54 Years	29,026	14.5%	26,635	12.7%	25,992	12.0%
55 to 64 Years	21,842	10.9%	26,252	12.5%	26,295	12.1%
65 to 74 Years	12,521	6.3%	17,933	8.5%	20,422	9.4%
75 to 84 Years	6,363	3.2%	8,066	3.8%	10,017	4.6%
85 Years and Over	2,156	1.1%	2,743	1.3%	3,015	1.4%
Total Population	199,913	100.0%	210,539	100.0%	216,568	100.0%
Median Age	34.5		36.1		37.2	
Age	Prince George's County					
	2010		2018		2023	
	Number	Percent	Number	Percent	Number	Percent
0 to 19 Years	236,408	27.4%	235,150	25.5%	237,698	24.9%
20 to 24 Years	70,644	8.2%	68,937	7.5%	65,855	6.9%
25 to 34 Years	125,740	14.6%	138,320	15.0%	141,034	14.8%
35 to 44 Years	123,932	14.4%	123,394	13.4%	135,905	14.2%
45 to 54 Years	128,053	14.8%	121,681	13.2%	117,753	12.3%
55 to 64 Years	97,130	11.2%	114,196	12.4%	115,639	12.1%
65 to 74 Years	50,100	5.8%	75,793	8.2%	86,721	9.1%
75 to 84 Years	23,125	2.7%	32,674	3.5%	42,603	4.5%
85 Years and Over	8,288	1.0%	11,221	1.2%	12,895	1.3%
Total Population	863,420	100.0%	921,366	100.0%	956,103	100.0%
Median Age	34.9		36.4		37.4	

Table A-8 continued. Population by Age, 2018

Age	Metro Area ³					
	2010		2018		2023	
	Number	Percent	Number	Percent	Number	Percent
0 to 19 Years	1,489,839	26.4%	1,553,505	25.1%	1,592,077	24.3%
20 to 24 Years	375,733	6.7%	392,474	6.3%	382,758	5.8%
25 to 34 Years	861,925	15.3%	931,659	15.0%	991,757	15.1%
35 to 44 Years	848,059	15.0%	870,623	14.1%	965,616	14.7%
45 to 54 Years	861,857	15.3%	844,148	13.6%	827,597	12.6%
55 to 64 Years	633,923	11.2%	781,073	12.6%	799,482	12.2%
65 to 74 Years	324,024	5.7%	506,359	8.2%	600,023	9.1%
75 to 84 Years	167,434	3.0%	221,935	3.6%	295,130	4.5%
85 Years and Over	73,438	1.3%	94,412	1.5%	104,404	1.6%
Total Population	5,636,232	100.0%	6,196,188	100.0%	6,558,844	100.0%
Median Age	36.1		37.4		38.1	

Note: ¹Primary Market Area includes five Census Tracts: 8030.01, 8031.00, 78.06, 78.07, and 78.09. ²Secondary Market Area is bordered by the Anacostia River on the east, I-295 (Baltimore-Washington Parkway) to the north, I-95 (Capital Beltway) to the east, and Pennsylvania Avenue to the south. ³Metro area includes the District of Columbia; the cities of Alexandria, Fairfax, Falls Church, Manassas, and Manassas Park; and Arlington, Calvert, Charles, Clarke, Culpeper, Fairfax, Fauquier, Frederick, Jefferson, Loudoun, Montgomery, Prince George's, Prince William, Rappahannock, Spotsylvania, Stafford, and Warren counties.

Source: ESRI, Demographic and Income Profile; Partners for Economic Solutions, 2018.

Table A-9. Tenure by Age of Householder, 2010

Age of Householder	Primary Market Area ¹				Secondary Market Area ²			
	Owner		Renter		Owner		Renter	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
15 to 24 years	15	9.6%	141	90.4%	307	13.3%	1,998	86.7%
25 to 34 years	225	33.6%	444	66.4%	3,940	33.8%	7,705	66.2%
35 to 44 years	420	44.8%	517	55.2%	7,045	48.1%	7,611	51.9%
45 to 54 years	571	50.8%	552	49.2%	9,016	54.0%	7,673	46.0%
55 to 64 years	566	59.0%	394	41.0%	8,672	63.8%	4,926	36.2%
65 to 74 years	385	66.5%	194	33.5%	5,732	67.8%	2,724	32.2%
75 to 84 years	233	73.7%	83	26.3%	3,265	72.2%	1,256	27.8%
85 years and over	136	80.0%	34	20.0%	1,108	73.6%	397	26.4%
Total	2,551	52.0%	2,359	48.0%	39,085	53.3%	34,290	46.7%

Age of Householder	Prince George's County				Metro Area ³			
	Owner		Renter		Owner		Renter	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
15 to 24 years	1,321	11.1%	10,582	88.9%	9,633	13.3%	62,625	86.7%
25 to 34 years	17,154	35.8%	30,776	64.2%	142,397	38.5%	227,014	61.5%
35 to 44 years	37,696	58.9%	26,325	41.1%	280,451	63.1%	163,746	36.9%
45 to 54 years	50,419	70.1%	21,532	29.9%	353,527	73.1%	130,397	26.9%
55 to 64 years	44,896	77.6%	12,981	22.4%	292,583	78.7%	79,107	21.3%
65 to 74 years	24,933	80.0%	6,246	20.0%	158,766	80.1%	39,375	19.9%
75 to 84 years	11,431	78.1%	3,207	21.9%	81,278	75.3%	26,672	24.7%
85 years and over	3,143	69.2%	1,400	30.8%	28,949	62.3%	17,513	37.7%
Total	190,993	62.8%	113,049	37.2%	1,347,584	64.4%	746,449	35.6%

Note: ¹Primary Market Area includes five Census Tracts: 8030.01, 8031.00, 78.06, 78.07, and 78.09. ²Secondary Market Area is bordered by the Anacostia River on the east, I-295 (Baltimore-Washington Parkway) to the north, I-95 (Capital Beltway) to the east, and Pennsylvania Avenue to the south. ³Metro area includes the District of Columbia; the cities of Alexandria, Fairfax, Falls Church, Manassas, and Manassas Park; and Arlington, Calvert, Charles, Clarke, Culpeper, Fairfax, Fauquier, Frederick, Jefferson, Loudoun, Montgomery, Prince George's, Prince William, Rappahannock, Spotsylvania, Stafford, and Warren counties.

Source: U.S. Census of Population, 2010; Partners for Economic Solutions, 2018.

Table A-10. Housing Units by Number of Units in Structure, 2018

Units in Structure	Primary Market Area ¹		Secondary Market Area ²		Prince George's County		Metro Area ³	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
1, Detached	2,394	42.0%	31,519	37.3%	169,818	51.3%	1,067,487	46.4%
1, Attached	1,219	21.4%	20,624	24.4%	53,181	16.1%	453,478	19.7%
2	116	2.0%	1,019	1.2%	1,510	0.5%	22,148	1.0%
3 to 4	251	4.4%	3,808	4.5%	5,373	1.6%	53,050	2.3%
5 to 9	314	5.5%	7,794	9.2%	23,141	7.0%	112,834	4.9%
10 to 19	1,374	24.1%	14,870	17.6%	47,567	14.4%	221,643	9.6%
20 to 49	-	0.0%	1,241	1.5%	6,561	2.0%	74,183	3.2%
50 or more	30	0.5%	3,536	4.2%	21,840	6.6%	281,802	12.2%
Mobile Home	-	0.0%	110	0.1%	1,661	0.5%	15,709	0.7%
Other	-	0.0%	9	0.0%	56	0.0%	759	0.0%
Total	5,698	100.0%	84,530	100.0%	330,708	100.0%	2,303,093	100.0%

Note: ¹Primary Market Area includes five Census Tracts: 8030.01, 8031.00, 78.06, 78.07, and 78.09. ²Secondary Market Area is bordered by the Anacostia River on the east, I-295 (Baltimore-Washington Parkway) to the north, I-95 (Capital Beltway) to the east, and Pennsylvania Avenue to the south. ³Metro area includes the District of Columbia; the cities of Alexandria, Fairfax, Falls Church, Manassas, and Manassas Park; and Arlington, Calvert, Charles, Clarke, Culpeper, Fairfax, Fauquier, Frederick, Jefferson, Loudoun, Montgomery, Prince George's, Prince William, Rappahannock, Spotsylvania, Stafford, and Warren counties.

Source: ESRI American Community Survey (ACS), 2016; Partners for Economic Solutions, 2018.

Table A-11. Housing Units by Year Built, 2015

Year Built	Primary Market Area ¹		Secondary Market Area ²		Prince George's County		Metro Area ³	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
2010 or later	30	0.5%	1,407	1.7%	6,356	1.9%	68,758	3.0%
2000 to 2009	212	3.7%	6,177	7.3%	36,460	11.0%	353,430	15.3%
1990 to 1999	447	7.8%	6,003	7.1%	45,481	13.8%	332,994	14.5%
1980 to 1989	272	4.8%	6,660	7.9%	46,113	13.9%	376,002	16.3%
1970 to 1979	590	10.4%	10,666	12.6%	51,367	15.5%	340,670	14.8%
1960 to 1969	1,031	18.1%	18,588	22.0%	66,959	20.2%	287,385	12.5%
1950 to 1959	1,056	18.5%	17,622	20.8%	46,146	14.0%	225,332	9.8%
1940 to 1949	1,179	20.7%	11,487	13.6%	17,093	5.2%	120,836	5.2%
1939 or Earlier	881	15.5%	5,922	7.0%	14,733	4.5%	197,686	8.6%
Total	5,698	100.0%	84,532	100.0%	330,708	100.0%	2,303,093	100.0%
Median Year Built	1957		1964		1974		1979	

Note: ¹Primary Market Area includes five Census Tracts: 8030.01, 8031.00, 78.06, 78.07, and 78.09. ²Secondary Market Area is bordered by the Anacostia River on the east, I-295 (Baltimore-Washington Parkway) to the north, I-95 (Capital Beltway) to the east, and Pennsylvania Avenue to the south. ³Metro area includes the District of Columbia; the cities of Alexandria, Fairfax, Falls Church, Manassas, and Manassas Park; and Arlington, Calvert, Charles, Clarke, Culpeper, Fairfax, Fauquier, Frederick, Jefferson, Loudoun, Montgomery, Prince George's, Prince William, Rappahannock, Spotsylvania, Stafford, and Warren counties.

Source: ESRI American Community Survey (ACS), 2016; Partners for Economic Solutions, 2018.

Development/Owner/ Address	Class	Rental Type	Floor Plans	No. of Units	Rental Rates	Square Feet	Rent per Sq. Ft.	Opening Date	Stories	Acres	Units per Acre	Occupancy Rate	Parking Spaces per Unit	Amenities
Conifer Village at Oakcrest District Heights, MD 20747	A	Restricted	1 BR	100	\$1,050	850	\$1.24	2017	4	4.34	46.1	96.0%		Air Conditioning, Balcony, Cable Ready, Fitness Center, Wheelchair Accessible (Rooms), Laundry Facilities
			2 BR	100	\$1,225	1,000	\$1.23							
Laurel Gardens- Phase III 901 Nichols Drive, Laurel, MD 20707	A	Senior	2 BR	60	N/A	990	N/A	2018	3	4.81	12.5	N/A	N/A	
The Willows at Victoria Falls Victory Housing 14001 Belle Chasse Blvd, Laurel, MD 20708	B	Market	2 BR	75	\$2,217	1,655	\$1.34	2013	4	1.50	50	94.7%		Business Center, Clubhouse, Elevator, Fitness Center, Gamerroom, Library, Picnic Area, Pool, Sauna, Washer/Dryer, Cable Ready, Air Conditioning, Balcony
Victory Crest 6100 Sargent Road, Hyattsville, MD 20782	B	Subsidized	1 BR	60	\$1,657	550	\$3.01	2010	3	6.72	8.9	96.7%	0.72	Air Conditioning, Balcony, Business Center, Cabana, Fitness Center, Wheelchair Accessible (Rooms)
Jericho Residences Jericho Baptist Church Ministries 1000 Brightseat Road, Landover, MD 20785	B	Restricted	Studio	2	\$740	363	\$2.04	2009	4	5.58	48.4	97.1%	0.81	Air Conditioning, Carpet, Clubhouse, Courtyard, Fitness Center, Media Center/Movie Theatre, Package Service, Tile Floors, Vaulted Ceiling, Views, Washer/Dryer, Wheelchair Accessible (Rooms)
			1 BR	59	\$1,353	737	\$1.84							
			2 BR	192	\$1,644	1,109	\$1.48							
			3 BR	17	\$1,780	1,238	\$1.44							
The Lodge at Marlton The Corporation Trust, Inc. 9590 Grain Highway, Upper Marlboro, MD 20772	B	Restricted	1 BR	19	\$1,016	673	\$1.48	2009	4	2.49	41.0	100.0%	0.54	Air Conditioning, Business Center, Carpet, Dishwasher, Disposal, Fitness Center, Laundry Facilities, Laundry Service, Washer/Dryer Hookup, Wheelchair Accessible (Rooms)
				2 BR	83	\$1,488	903	\$1.24						

Development/Owner/ Address	Class	Rental Type	Floor Plans	No. of Units	Rental Rates	Square Feet	Rent per Sq. Ft.	Opening Date	Stories	Acres	Units per Acre	Occupancy Rate	Parking Spaces per Unit	Amenities
Victory House of Palmer Park Victory Housing 7801 Barlowe Road, Hyattsville, MD 20785	B	Subsidized	1 BR	68	\$663	750	\$0.88	2005	3	5.43	12.5	98.50%	1.03	Air Conditioning, Balcony, Business Center, Cable Ready, Carpet, Disposal, Fitness Center, Laundry Facilities, Laundry Service, Library, Lounge, Multi-Use Room, Patio, Picnic Area, Porch, Tanning Salon, Wheelchair Accessible (Rooms)
Fort Washington Manor AHD, Inc. 10800 Indian Head Highway, Fort Washington, MD 20744	B	Restricted	1 BR 2 BR	52 98	\$1,127 \$1,322	656 856	\$1.72 \$1.54	2005	3	5.19	28.9	98.00%	1.20	Air Conditioning, Balcony, Business Center, Clubhouse, Controlled Access, Fitness Center, Game Room, Pet Play Area, Picnic Area, Planned Social Activities, Walking/Biking Trails, Walk-in Closets, Washer/ Dryer Hookup, Wheelchair Accessible (Rooms)
Trinity Terrace Victory Housing 6001 Fisher Road Temple Hills, MD 20748	B	Subsidized	1 BR	72	\$616	540	\$1.14	2004	3	4.75	15.2	97.20%	0.69	Air Conditioning, Balcony, Business Center, Cable Ready, Carpet, Disposal, Fitness Center, Laundry Facilities, Picnic Area, Wheelchair Accessible (Rooms)
Windsor Crossing Senior Stavrou Associates 5000 Lydianna Lane, Suitland, MD 20746	B	Restricted	1 BR 2 BR	25 100	\$748 \$1,110	677 859	\$1.11 \$1.29	2004	4	5.64	22.2	100.00%		Business Center, Fitness Center, Pool, Property Manager on Site, Walk-in Closets
The Willows Senior Community Developers of Oakcrest, Inc. 3850 Enfield Chase Court, Bowie, MD 20716	B	Market	1 BR	5	NA	759	NA	2004	3	4.32	18.3	100.00%	0.95	Air Conditioning, Business Center, Carpet, Controlled Access, Dishwasher, Disposal, Elevator, Fireplace, Fitness Center, Gameroom, Library, Media Center/Movie Theatre, Microwave, Pantry, Planned Social Activities, Property Manager on Site, Walking/Biking Trails, Washer/Dryer, Wheelchair Accessible (Rooms), Wi-Fi, Window Coverings

Table A-12. Table A-12. Selected Competitive Senior Multi-Family Developments, Prince George's County, 2018

Development/Owner/ Address	Class	Rental Type	Floor Plans	No. of Units	Rental Rates	Square Feet	Rent per Sq. Ft.	Opening Date	Stories	Acres	Units per Acre	Occupancy Rate	Parking Spaces per Unit	Amenities
Ft. Washington Adventist Apts 11316 Fort Washington Road, Fort Washington, MD 20744	B	Subsidized		47				2003	3	3.87	12.1	94.1%	1.06	Air Conditioning, Wheelchair Accessible (Rooms)
Marwood Apartments Conifer Realty, LLC 5605 S. Marwood Boulevard, Upper Marlboro, MD 20772	B	Restricted	1 BR 2 BR	132 23	\$1,230 \$1,646	780 940	\$1.58 \$1.75	2002	4	7.28	21.3	96.8%	1.00	Air Conditioning, Business Center, Cable Ready, Carpet, Clubhouse, Controlled Access, Dishwasher, Disposal, Elevator, Fireplace, Fitness Center, Guest Apartment, High-Speed Internet Access, Laundry Facilities, Maintenance on Site, Package Service, Pool, Property Manager on Site, Storage Space, Tile Floors, Tub/Shower, Walk-in Closets, Washer/Dryer, Wi-Fi, Window Coverings
Cheval Court Victory Housing 2611 Luana Drive, Forestville, MD 20747	B	Subsidized	1 BR	26	\$717	590	\$1.22	2002	3	0.43	60.5	100.0%		Air Conditioning, Cable Ready, Carpet, Clubhouse, Dishwasher, Disposal, Gated, High-Speed Internet Access, Laundry Facilities, Laundry Service, Package Service, Pet Play Area, Planned Social Activities, Wheelchair Accessible (Rooms)
The Manor at Victoria Park Habitat America, LLC 3420 Rickey Avenue, Temple Hills, MD 20748	B	Restricted	1 BR 2 BR	106 42	\$927 \$1,250	700 937	\$1.32 \$1.33	2000	3	12.85	11.5	100.0%	0.88	24-Hour Availability, Air Conditioning, Balcony, Breakfast/Coffee Concierge, Breakfast Nook, Business Center, Cable Ready, Carpet, Controlled Access, Dishwasher, Disposal, Fitness Center, Gated, High-Speed Internet Access, Laundry Facilities, Maintenance on Site, Package Service, Patio, Pet Play Area, Picnic Area, Planned Social Activities, Property Manager on Site, Views, Walk-in Closets, Wheelchair Accessible (Rooms), Window Coverings

Development/Owner/ Address	Class	Rental Type	Floor Plans	No. of Units	Rental Rates	Square Feet	Rent per Sq. Ft.	Opening Date	Stories	Acres	Units per Acre	Occupancy Rate	Parking Spaces per Unit	Amenities
Laurel Lakes Johnathan Williams 7901 Laurel Lakes Avenue Laurel, MD 20707	B	Restricted	1 BR	112	\$1,008	565	\$1.78	2000	4	4.36	28.7	98.4%		Air Conditioning, Balcony, Cabana, Cable Ready, Carpet, Clubhouse, Dishwasher, Disposal, Fitness Center, Gamerom, Gated, Laundry Facilities, Laundry Service, Property Manager on Site, Sprinkler System, Tile Floors, Walking/Biking Trails, Wheelchair Accessible (Rooms)
St. Paul Senior Living Apartments The Bozzuto Group 1207 Addison Road	B	Restricted	1 BR 2 BR	182 41	\$890 \$1,050	670 851	\$1.33 \$1.23	2000	4			98.7%	0.54	Air Conditioning, Alarm, Breakfast/Coffee Concierge, Business Center, Cable Ready, Carpet, Controlled Access, Dishwasher, Elevator, Fenced Lot, Fitness Center, Gamerom, Garden, Gated, Laundry Facilities, Library, Linen Closet, Meal Service, Microwave, Multi- Use Room, On-Line Services, On-Site Retail, Package Service, Recreation Room, Tub/ Shower, Waterfront, Wheelchair Accessible (Rooms)
Evergreen Senior Apartments Michele G. McMorris 3800 Enfield Chase Court, Bowie, MD 20716	B	Market	1 BR 2 BR	73 32	\$1,279 \$1,690	727 1,094	\$1.76 \$1.54	1999	4	4.80	21.9	100.0%	1.10	Air Conditioning, Balcony, Cable Ready, Carpet, Dishwasher, Disposal, Fitness Center, Gamerom, Gated, Grill, Media Center/Movie Theatre, Picnic Area, Property Manager on Site, Walking/Biking Trails, Washer/ Dryer, Wheelchair Accessible (Rooms)
Avondale Park Victory Housing 4915 Eastern Avenue, Hyattsville, MD 20782	B	Subsidized	1 BR	88	\$554	550	\$1.01	1999	3	4.83	18.2	100.0%	0.63	Air Conditioning, Balcony, Business Center, Courtyard, Fitness Center, Gamerom, Picnic Area, Walking/Biking Trails, Wheelchair Accessible (Rooms)

Development/Owner/ Address	Class	Rental Type	Floor Plans	No. of Units	Rental Rates	Square Feet	Rent per Sq. Ft.	Opening Date	Stories	Acres	Units per Acre	Occupancy Rate	Parking Spaces per Unit	Amenities
Clinton Manor AHD, Inc. 8500 Mike Shapiro Drive, Clinton, MD 20735	B	Restricted	1 BR 2 BR	96 15	\$985 \$1,115	597 880	\$1.65 \$1.27	1999	4	3.68	30.2	92.8%	0.70	Air Conditioning, Balcony, Business Center, Cable Ready, Carpet, Clubhouse, Courtyard, Elevator, Fitness Center, Gameroom, Multi-Use Room, Online Services, Pet Play Area, Planned Social Activities, Tile Floors, Wheelchair Accessible (Rooms)
Selborne House Tilford A. Jones, LLC 501 Main Street, Laurel, MD 20707	B	Restricted	Studio 1 BR	4 122	\$715 \$845	452 559	\$1.58 \$1.51	1998	4	2.63	47.9	100.0%	0.95	Air Conditioning, Balcony, Carpet, Controlled Access, Dishwasher, Disposal, Elevator, Fitness Center, Fireplace, Laundry Facilities, Multi-Use Room, Patio, Sprinkler System, Storage Space, Wheelchair Accessible (Rooms)
Chillum Oaks Adventist Apartments Chillum Oaks Adventist Apts 6305 Riggs Road, Hyattsville, MD 20783	B	Subsized		48				1997	3	1.85	25.9	97.8%	0.56	Air Conditioning, Wheelchair Accessible (Rooms)
Manor Apartments Victory Housing 4907 Eastern Avenue, Hyattsville, MD 20782	B	Subsized	Studio	16	\$553	400	\$1.38	1997	4	4.83	12.8	98.4%	1.61	Air Conditioning, Balcony, Clubhouse, Disposal, Gameroom, Gated, Grill, Laundry Facilities, Picnic Area, Security System, Wheelchair Accessible (Rooms)
Pin Oak Village Humphrey Management 16010 Excalibur Road, Bowie, MD 20716	B	Restricted	1 BR 2 BR	170 50	\$1,155 \$1,389	719 847	\$1.61 \$1.62	1996	4	7.00	31.4	95.4%	0.73	Air Conditioning, Balcony, Cabana, Cable Ready, Carpet, Dishwasher, Disposal, Fitness Center, Gameroom, Grill, Laundry Facilities, Media Center/Movie Theatre, On-Site Retail, Property Manager on Site, Video Patrol, Wheelchair Accessible (Rooms)

Development/Owner/ Address	Class	Rental Type	Floor Plans	No. of Units	Rental Rates	Square Feet	Rent per Sq. Ft.	Opening Date	Stories	Acres	Units per Acre	Occupancy Rate	Parking Spaces per Unit	Amenities
Vistas at Lake Largo Beachwold Residential 500 N. Harry S. Truman Drive, Largo, MD 20774	B	Restricted	1 BR 2 BR	78 32	\$1,075 \$1,289	634 895	\$1.70 \$1.44	1995	4	3.31	33.2	91.8%	0.55	Air Conditioning, Carpet, Clubhouse, Dishwasher, Disposal, Fitness Center, High- Speed Internet Access, Laundry Facilities, Media Center/Movie Theatre, Microwave, Wheelchair Accessible (Rooms)
Woodside Village Humphrey Management 6801 Bock Road, Fort Washington, MD 20744	B	Restricted	1 BR 2 BR	170 30	\$1,154 \$1,320	784 895	\$1.47 \$1.47	1995	4	13.95	14.3	98.0%	0.75	Air Conditioning, Balcony, Cabana, Cable Ready, Carpet, Dishwasher, Fitness Center, Gamerroom, Gated, Grill, Media Center/Movie Theatre, Picnic Area, Planned Social Activities, Property Manager on Site, Tanning Salon, Walking/Biking Trails, Wheelchair Accessible (Rooms)
Park View at Laurel 9000 Briarcroft Lane, Laurel, MD 20708	B	Restricted	1 BR 2 BR	246 7	\$900 \$1,065	652 855	\$1.38 \$1.25	1995	4	25.94	9.8	97.6%	1.00	Air Conditioning, Courtyard, Wheelchair Accessible (Rooms)
Park View at Bladensburg The Shelter Group 4202 58th Avenue Bladensburg, MD 20710	B	Restricted	1 BR 2 BR	101 1	\$959 \$1,100	592 1,049	\$1.62 \$1.05	1995	3	5.12	19.9	100.0%	0.88	Air Conditioning, Balcony, Business Center, Cable Ready, Carpet, Clubhouse, Courtyard, Gamerroom, Gated, High Speed Internet Access, Laundry Facilities, Planned Social Activities, Property Manager on Site, Security System, Sprinkler System, Wheelchair Accessible (Rooms)
Mrs. Philipppines Apartments Quantum Real Estate Management, LLC 6482 Bock Road, Oxon Hill, MD 20745	B	Subsidized	Studio 1 BR	18 56	\$1,111 \$1,122	400 500	\$2.78 \$2.24	1991	4	2.28	32.5	98.6%	0.59	Air Conditioning, Balcony, Cable Ready, Carpet, Ceiling Fans, Clubhouse, Dishwasher, Disposal, Fitness Center, Gamerroom, Laundry Facilities, Microwave, Property Manager on Site

Development/Owner/ Address	Class	Rental Type	Floor Plans	No. of Units	Rental Rates	Square Feet	Rent per Sq. Ft.	Opening Date	Stories	Acres	Units per Acre	Occupancy Rate	Parking Spaces per Unit	Amenities
Rollingcrest Commons Humphrey Management 6060 Sargent Road, Jattsville, MD 20782	B	Restricted	1 BR	84	\$1,147	600	\$1.91	1989	2	11.76	11.9	96.4%	1.00	Air Conditioning, Balcony, Cabana, Carpet, Clubhouse, Court yard, Dishwasher, Disposal, Fitness Center, Gamer room, Guest Apartment, Laundry Facilities, Microwave, Picnic Area, Property Manager on Site, Sprinkler System, Walking/Biking Trails, Wheelchair Accessible (Rooms)
			2 BR	56	\$1,389	800	\$1.74							
Spellman House Apartments Arbor Management, LLC 4711 Berwyn House Road, College Park, MD 20740	B	Subsidized	1 BR	141	\$1,302	700	\$1.86	1982	7	3.00	47.0	97.2%	0.35	Air Conditioning, Dishwasher, Disposal, Elevator, Gamer room, Laundry Facilities, Planned Social Activities, Storage Units, Tanning Salon
Emerson House Quantum Real Estate Management, LLC 5999 Emerson Street, Bladensburg, MD 20710	B	Subsidized	1 BR	220	\$1,248	684	\$1.82	1979	9	4.70	46.8	100.0%	0.32	24-Hour Availability, Air Conditioning, Alarm, Cable Ready, Carpet, Court yard, Greenhouse, Laundry Facilities, Library, Lounge, Maintenance on Site, Media Center/Movie Theatre, Multi-Use Room, Planned Social Activities, Property Manager on Site, Security System, Sprinkler System, Tanning Salon, Tile Floors, Waterfront, Wheelchair Accessible (Rooms)
7302 Yale Avenue Arshad M. Sheikh 7302 Yale Avenue, College Park, MD 20740	B	Market	2 BR	6	\$2,817	1,033	\$2.73	1953	3	0.25	24.0		1.67	

Note: Limited to Class A and B developments. There are 7 Class C developments with 813 units not shown in the table above.

Source: CoStar, 2018; Partners for Economic Solutions, 2018.

Appendix B

Existing Public Utilities





Acknowledgments

Andree Checkley-Green Planning Director

Project Team Core Members

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David Lambard	STV

Special thanks to:

Prince George's County Office of the County Executive

The Town of Fairmount Heights

Citizens, businesses and property owners, members of Fairmont Heights High School Alumni Association, elected officials and County agencies.

