

Part 7. Evaluation of Prince George's County Potential for Active Adult Communities

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Potential Active Adult Sites

Introduction

This section provides an analysis of several prospective locations for an active adult community in Prince George's County. These locations, while somewhat specific, are dispersed throughout the Developing Tier of Prince George's County to provide an assessment of this area of the county relative to its suitability for active adult housing development.

To have a consistent reference point across the 13 locations, a three-mile area is used to evaluate each location (some locations overlap). The demand for active adult housing and the resources are evaluated for each three-mile radius.

Locations. The locations selected for evaluation were among a number identified by The Maryland-National Capital Park and Planning Commission in Prince George's County where there are 15 acres or more of undeveloped land and that are not owned by a government agency. Thirteen of these locations have been visited and evaluated as prospective locations for active adult developments. The process used to evaluate these sites included evaluating the general location of the site and the elements that are present within a three-mile radius of the site including:

1. The aesthetic appeal of the area.
2. The natural resources.
3. The access to the site and the extent of visibility of the site relative to drive-by traffic.
4. The availability of retail, commercial and public services to the site.

Rating of the Prospective Locations

The next two pages show attributes of good sites and locations for active adult communities. The specific attribute is listed in the first column (on the left) and the criteria for rating the locations or site is listed in each of the subsequent columns. The columns are numbered from "1" to "5" with a "1" representing the lowest or poorest score and a "5" representing the highest score.

These evaluations are subjective and can change based on a change of opinion or a change in the attributes present in the location. The evaluations are a simple assessment of the prospective areas.

In truth, while some of the areas in the Developing Tier in Prince George's County appear to be slightly better than others, all of the prospective areas that were evaluated in Prince George's County are excellent locations for active adult communities.

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Criteria to Evaluate a Specific Site					
Attribute	Description of Characteristics on Potential Site Related to a Score From "1" to "5"				
	1	2	3	4	5
Site appearance	No features, minimal or unsightly signage, no vegetation.	Sparse vegetation, lackluster landscaping, mediocre signage.	Average size, quantity and quality of vegetation. Good landscaping. Entrance is neutral in its effect, not good or bad.	Above average quantity and quality of vegetation and landscaping. Interesting.	Wow. Creates interest, natural, vegetation, manicured, seasonal color, established trees and vegetation, entrance makes a strong positive statement.
Topography	Difficult to traverse, park a car, or too steep to walk.		Flat, neutral. Doesn't create problems, but little visual interest.		Gentle roll, diversity. Easy to traverse but interesting.
Access to site	Must wait for traffic, scary, dangerous.	Must wait for traffic, but not dangerous.	Both good and difficult.	Predominantly easy access.	Easy, near off-ramp, light controlled if in traffic area, minimal wait.
Visibility	Cannot see site, no drive-by.	Can see, but must know it is there.	Good, but signage could be improved.		Can see signage, and property while driving by.
Drive-by traffic	None.	Minimal.	Modest, slightly below average.	Moderate or average for the market area.	Above average.
Green space or landscaping	None, all pavement, or housing.	Some, but needs upkeep, immature, sparse.	Average.		Plentiful greenspace, every home has "view," interesting and diverse.
Water features or other views	None.		Some, modest features for about 50 percent of the property. Merely a water retention pond.		Good water views or other features that will enhance views from every prospective residence on the site.

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Criteria to Evaluate a Location					
Attribute	Description of Characteristics on Potential Site Related to a Score From "1" to "5"				
	1	2	3	4	5
Homes and commercial buildings in surrounding neighborhood.	Poor quality. Need upkeep, abandoned, buildings, streets and sidewalks in disrepair.		Average.	Slightly better quality.	Top quality. Well kept, landscaped, strong value. Will help attract customers.
Retail, restaurants and services.	More than 12-minute drive.	Between 9 and 12 minute drive.	Within 5 and 8 minute drive.	Between 1 and 5 minute drive.	1-minute drive and walking distance.
Emergency medical.	More than 12-minute drive.	Between 9 and 12 minute drive.	Within 5 and 8 minute drive.	Between 1 and 5 minute drive.	1-minute drive and walking distance.
Major medical.	More than 20-minute drive.	Between 16 and 20 minute drive.	Within 11 and 15 minute drive.	Between 6 and 10 minute drive.	1 to 5-minute drive.
Adult education University/Community College.	More than 20-minute drive.	Between 16 and 20 minute drive.	Within 11 and 15 minute drive.	Between 6 and 10 minute drive.	1 to 5-minute drive.
Interstate/public transit access.	More than 15-minute drive.	Between 11 and 15 minute drive.	Within 6 and 10 minute drive.	Between 4 and 6 minute drive.	1 to 3-minute drive.
Recreation within 10 minutes: participatory sports, spectator sports, movies, outdoor recreation fishing, swimming, hiking, boating, bicycling.	None.	One to two recreational forms.	Three to four recreational forms.	Four to five recreational forms.	Full complement of recreational forms: Outdoor participatory, outdoor spectator, indoor participatory, indoor spectator.
Cultural opportunities within 10 minutes: theater, music, dance, visual arts, literary arts.	None.	One to two facilities offer quality programming.	Three to four facilities offer quality programming.	Four to five facilities offer quality programming.	More than five facilities offer quality programming.

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Summary of Evaluation Ratings, Average Home Values and Estimated Active Adult Demand of Locations for Active Adult Communities

As shown on this table, all of the locations have areas that would make excellent sites for active adult communities. Location scores of some areas are lower because these areas are more remote from cultural, recreational, health and retail services. Even the sites that have lower location scores offer excellent environments for active adult housing, the market that will likely be attracted to them will be younger, however, because these locations are in more rural areas.

The areas encompassed by the prospective locations overlap. The estimates of demand should **not** be added across the market areas because the same population would be counted more than once. This demand estimate shows the estimated number of households likely to choose a new residence in an active adult community from within the three-mile radius.

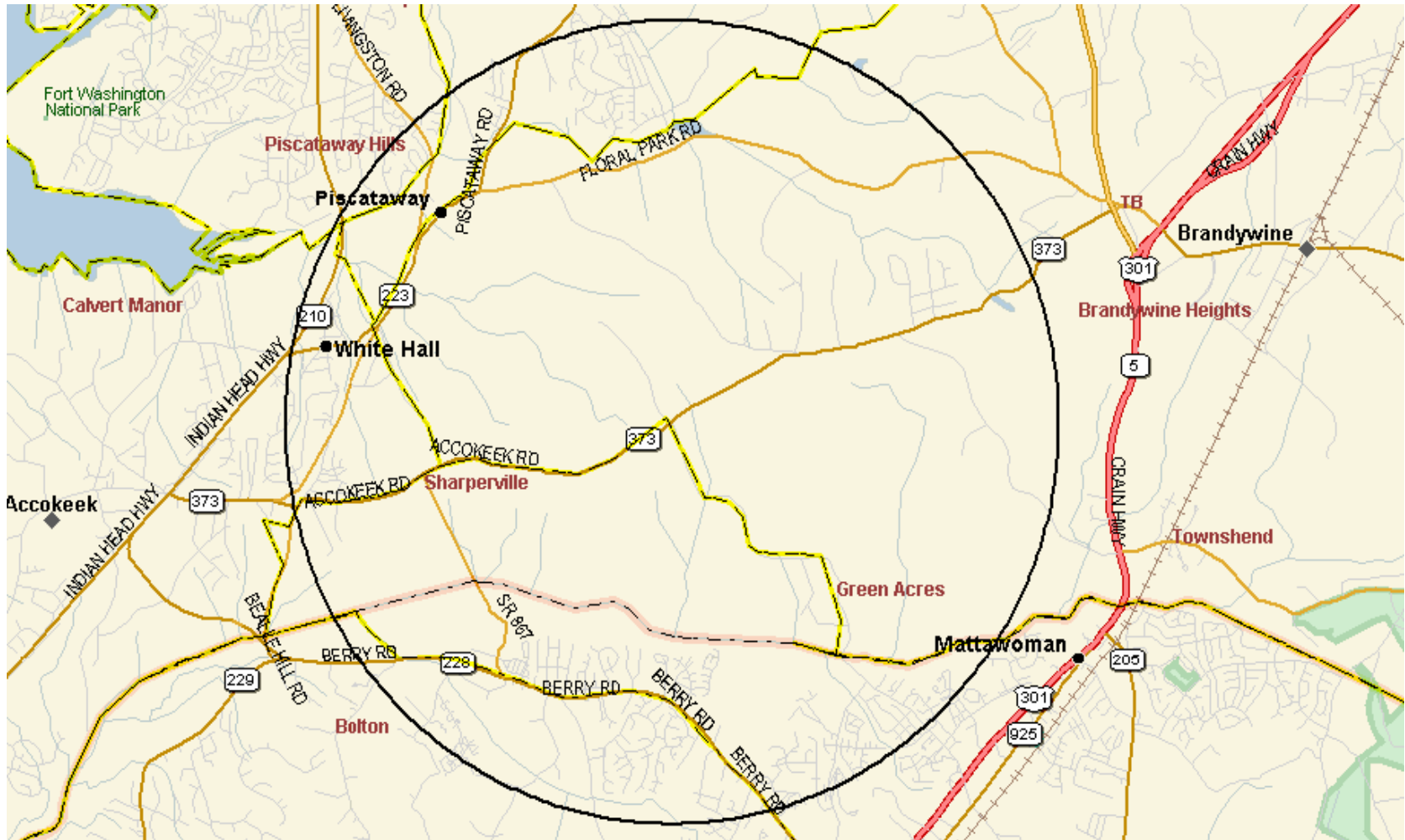
Location	Site Score Percent of Total Possible	Location Score Percent of Total Possible	Weighted Average Home Value	Estimate of Demand for Active Adult within 3-Mile Radius
Accokeek Road and Gardner Road	90%	40.0%	\$641,678	100
Branch Avenue and Northgate Parkway	88%	72.2%	\$524,089	149
Church Road and John Hanson Highway	100%	66.7%	\$521,628	347
Church Road and Oak Grove Road	80%	53.3%	\$480,051	189
Crane Highway and Annapolis Road	90%	77.8%	\$412,721	300
I-95 and Ritchie Marlboro Road	75%	75.6%	\$348,368	376
I-95 and Van Dusen	100%	88.9%	\$628,048	350
Indian Head Highway and Fort Washington Road	100%	80.0%	\$497,374	247
Indian Head Highway and Palmer Road	95%	82.2%	\$518,182	263
Largo Road and Lottsford Road	95%	93.3%	\$314,102	455
Piscataway Road and Catherine Road	80%	71.1%	\$542,976	187
Westphalia Road and Ritchie Road	90%	93.3%	\$390,594	267

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Sales Prices and Average Home Values of Homes in Primary Market Area (Source: Realtor.com 8/26/05)						
Zip	City	Minimum Sale Price	Maximum Sale Price	Number On Market	Average Home Value	Average Age of Homes
20607	Accokeek	\$135,000	\$850,000	35	\$526,644	14
20613	Brandywine, Clinton, Waldorf	\$259,900	\$1,500,000	53	\$717,644	16
20623	Cheltenham	\$280,000	\$575,000	8	\$403,125	26
20707	Laurel	\$179,900	\$27,750,008	92	\$687,718	24
20708	Montpelier, Laurel	\$275,000	\$699,900	30	\$445,063	20
20715	Bowie	\$230,000	\$975,000	98	\$412,721	33
20716	Mitchellville, Bowie	\$1,800	\$1,195,000	66		
20719	Bowie, Fairhaven	\$289,900	\$289,900	1	\$289,900	0
20720	Bowie	\$155,000	\$955,275	76	\$522,598	17
20721	Bowie, Mitchellville	\$1,850	\$2,250,000	71	\$617,287	11
20735	Clinton, Temple Hills	\$245,000	\$799,000	85	\$414,788	27
20743	Capitol Heights, Fairmount Heights, Seat Pleasant	\$100,000	\$395,000	117	\$230,191	42
20744	Fort Washington, Temple Hills	\$205,000	\$2,490,000	118	\$556,864	29
20745	Oxon Hill	\$160,000	\$429,900	18	\$264,600	45
20746	Suitland, Camp Springs	\$249,900	\$485,000	45	\$252,558	41
20747	District Heights, Carlson Springs, Forestville	\$80,000	\$429,900	69	\$259,951	38
20774	Upper Marlboro, Kettering, Springdale	\$115,000	\$2,500,000	81	\$459,074	18
20785	Hyattsville	\$125,900	\$455,000	58	\$280,912	52
20705	Beltsville	\$130,000	\$706,500	65	\$404,533	32
20706	Lanham	\$189,900	\$1,100,000	80	\$384,411	37
20769	Glenn Dale	\$350,000	\$890,000	24	\$509,023	31
20772	Upper Marlboro	\$1,650	\$3,000,000	123	\$469,288	22
Averages		\$170,941	\$1,093,827	64	\$433,757	27

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Accokeek Road and Gardner Road
Key Market Area (3-Mile Radius) Encompassed in Location Evaluation
ZIP Codes: 20607, 20613



**Part 7. Evaluation of Prince George's County
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Site Features Accokeek Road and Gardner Road						
Attribute	1	2	3	4	5	Assessment of This Site
Site appearance	No features, minimal or unsightly signage, no vegetation.	Sparse vegetation, lackluster landscaping, mediocre signage.	Average size, quantity and quality of vegetation. Good landscaping. Entrance is neutral in its effect, not good or bad.	Above average quantity and quality of vegetation and landscaping. Interesting.	Wow. Creates interest, natural, vegetation, manicured, seasonal color, established trees and vegetation, entrance makes a strong positive statement.	5-Great natural vegetation in this area.
Topography	Difficult to traverse, park a car, or too steep to walk.		Flat, neutral. Doesn't create problems, but little visual interest.		Gentle roll, diversity. Easy to traverse but interesting.	5-Ranges from flat to some significant hills. Great diversity. Sweeping views.
Drive by traffic	None.	Minimal.	Modest, slightly below average.	Moderate or average for the market area.	Above average.	3-Modest. 10,650 daily.
Water features or other views	None.		Some, modest features for about 50 percent of the property. Merely a water retention pond.		Good water views or other features that will enhance views from every prospective residence on the site.	5-Potential.

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Evaluation of Attributes of Accokeek Road and Gardner Road

Attribute	1	2	3	4	5	Score
Homes and commercial buildings in surrounding neighborhood	Poor quality. Needs upkeep, abandoned, buildings, streets and sidewalks in disrepair.		Average.	Slightly better quality	Top quality. Well kept, landscaped, strong value. Will help attract customers.	4
Retail, restaurants and services	More than 12-minute drive.	Between 9 and 12 minutes.	Within 5 and 8 minute drive.	Between 1 and 5 minutes.	1-minute drive and walking distance.	1-None within 3 miles. One within 13 minutes
Emergency medical	More than 12-minute drive.	Between 9 and 12 minutes.	Within 5 and 8 minute drive.	Between 1 and 5 minutes.	1-minute drive and walking distance.	1-Fort Washington Hospital. 6.24 miles, 13 minutes.
Major Medical	More than 20-minute drive.	Between 16 and 20 minutes	Within 11 and 15 minute drive.	Between 6 and 10 minutes.	5-minute drive.	3-Fort Washington Hospital. 6.24 miles, 13 minutes.
Adult Education University/Community College	More than 20-minute drive.	Between 16 and 20 minutes.	Within 11 and 15 minute drive.	Between 6 and 10 minutes.	1-to-5 minute drive.	1-George Washington University. 16 miles, 33 minutes.
Interstate/public transit access	More than 15-minute drive.	Between 11 and 15 minutes.	Within 6 and 10 minute drive.	Between 4 and 6 minutes.	1-to-3 minute drive.	1- I-95 17 miles, 35 minutes. Bus within 3 miles.
Recreation within 10 minutes: participatory sports, spectator sports, movies, outdoor recreation fishing, swimming, hiking, boating, bicycling	None.	One to two recreational forms	Three to four	Four to five	Full complement of recreational forms: Outdoor participatory, outdoor spectator, indoor participatory, indoor spectator	2-Several parks, hiking, fishing. Within 3 miles.
Cultural opportunities within 10 minutes: theater, music, dance, visual arts, literary arts	None.	One to two facilities offer quality programming.	Three to four facilities offer quality programming	Four to five facilities offer quality programming	More than five facilities offer quality programming.	1-Recreation Center. Within 3 miles.
Airport	More than 2 ½ hours.	1 ½ to 2 ½ hours.	Within 1 to 1 ½ hours	Within 30 to 59 minutes	Within 30 minutes.	4-Ronald Reagan. 19 miles, 39 minutes.

Part 7. Evaluation of Prince George's County Potential for Active Adult Communities

Annual Demand for Active Adult Communities in a 3-Mile Radius from Accokeek Road and Gardner Road, 2009

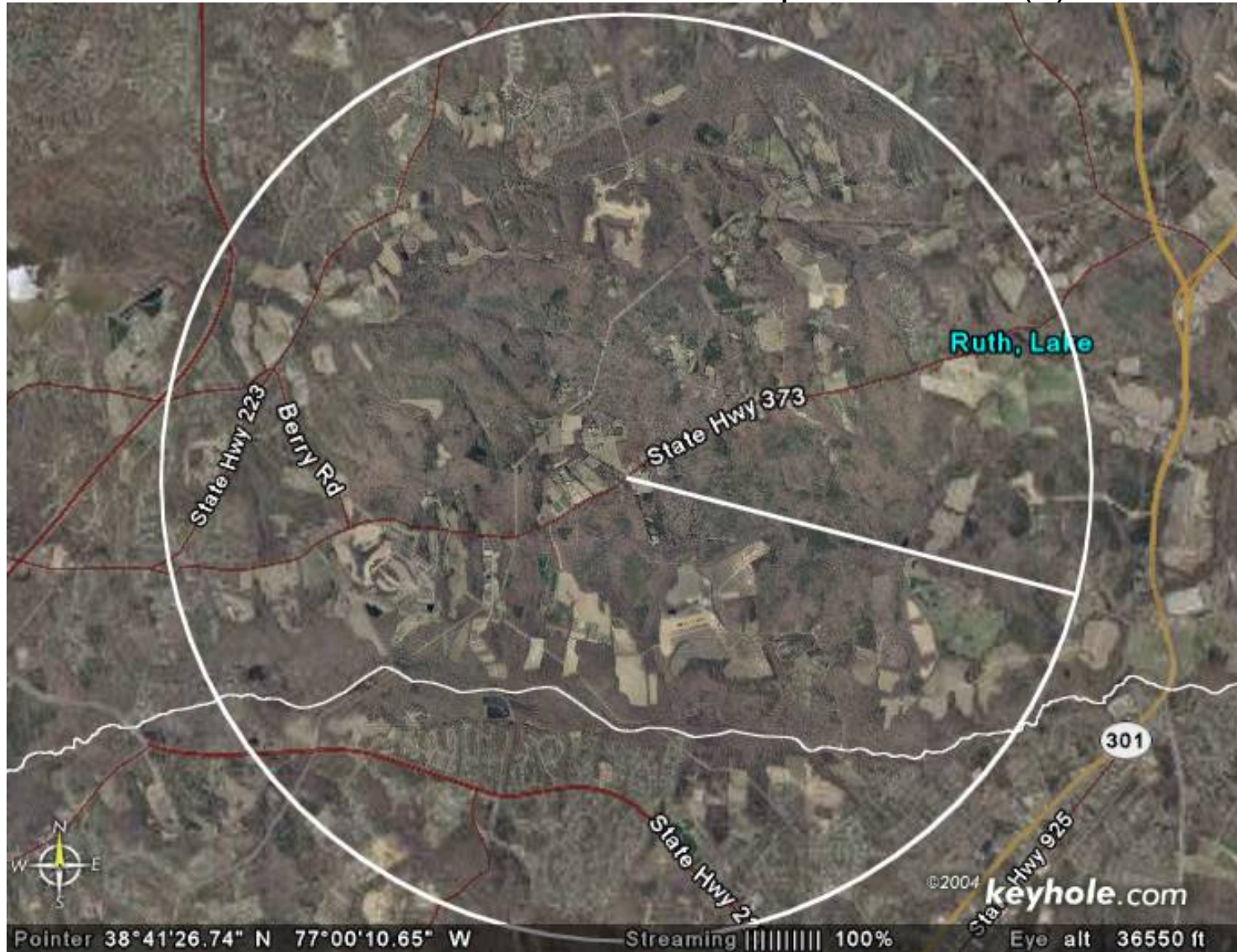
This table reveals that in 2009 among the age and home-value qualified households (home values of \$80,000 or more), there are an estimated 100 households within the PMA likely to move and choose an age-qualified community. There is 1 household with a home valued between \$100,000 and \$199,999; and 99 households with homes are valued at \$200,000 or more likely to move to an age-qualified community within the defined market each year.

Summary of Demand in Households by Home Value		
Total	\$100,000 to \$200,000	\$200,000+
100	1	99

Demand for Active Adult Communities in a 3-Mile Radius from Accokeek Road and Gardner Road, 2009	TOTAL	\$80,000 to \$99,999	\$100,000 to \$149,999	\$150,000 to \$199,999	\$200,000 to \$299,999	\$300,000 to \$399,999	\$400,000 to \$499,999	\$500,000 +
Number of Households in County	5,577							
Percent of Age-Qualified Households	31%							
Number of Age-Qualified Households in PMA	1,719.73							
% of Households with a Qualified Existing Home Value	99.6%	0.3%	0.2%	1.3%	12.3%	46.4%	28.6%	10.5%
Number of Age- and Home-Value Qualified Households	4,731	13	11	60	585	2,202	1,360	500
Annual Turnover Rate	9.6%	9.6%	9.6%	9.6%	9.6%	9.6%	9.6%	9.6%
Annual Turnover (Units)	454	1	1	6	56	211	131	48
Percentage Likely to Remain in PMA	90%	90%	90%	90%	90%	90%	90%	90%
Number Likely to Remain in PMA	409	1	1	5	51	190	118	43
Percent Interested in an Age-Qualified Community	24.5%	24.5%	24.5%	24.5%	24.5%	24.5%	24.5%	24.5%
Demand for Age-Qualified Community in Units	100	0	0	1	12	47	29	11

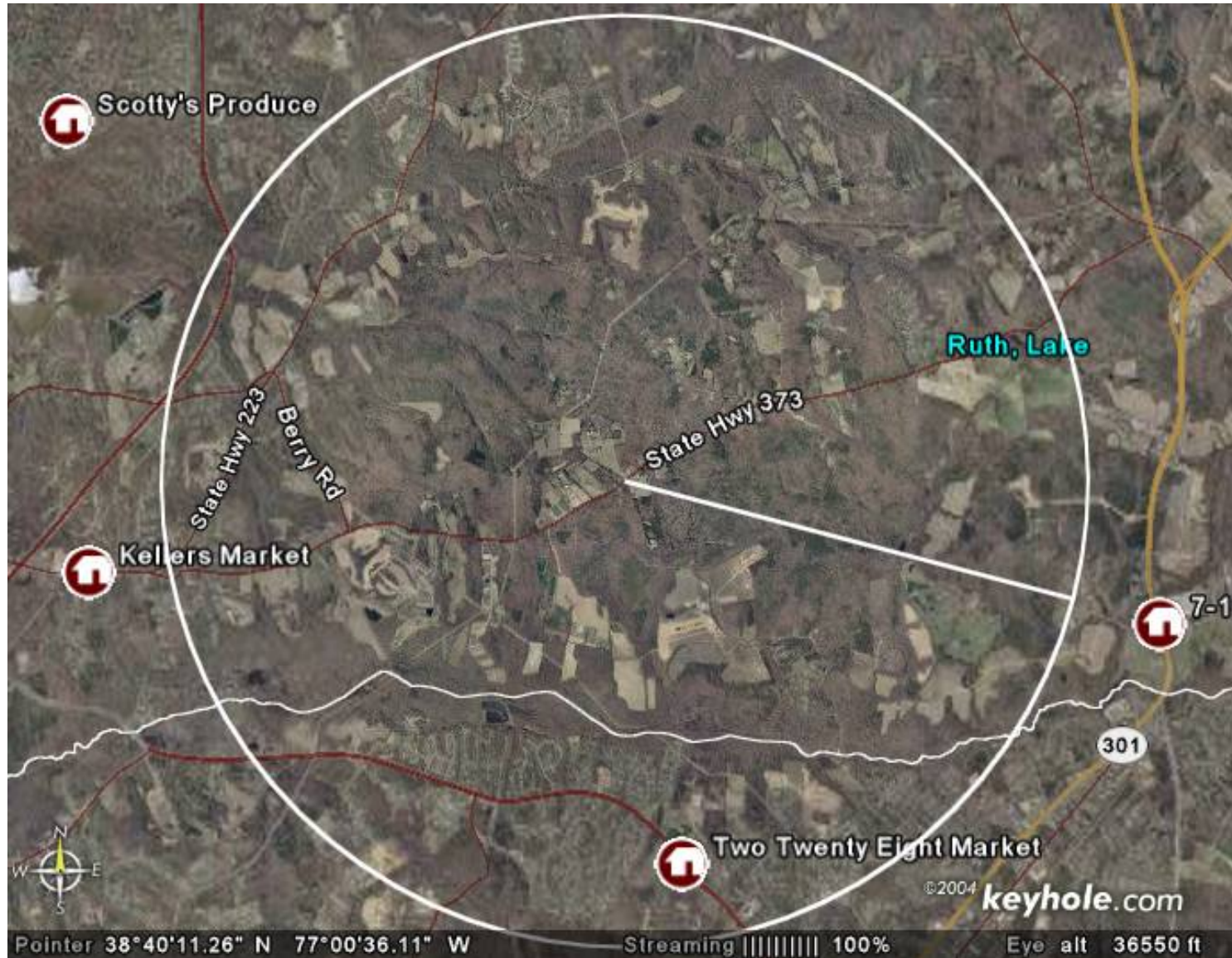
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Accokeek Road and Gardner Hospital and Fire (0)



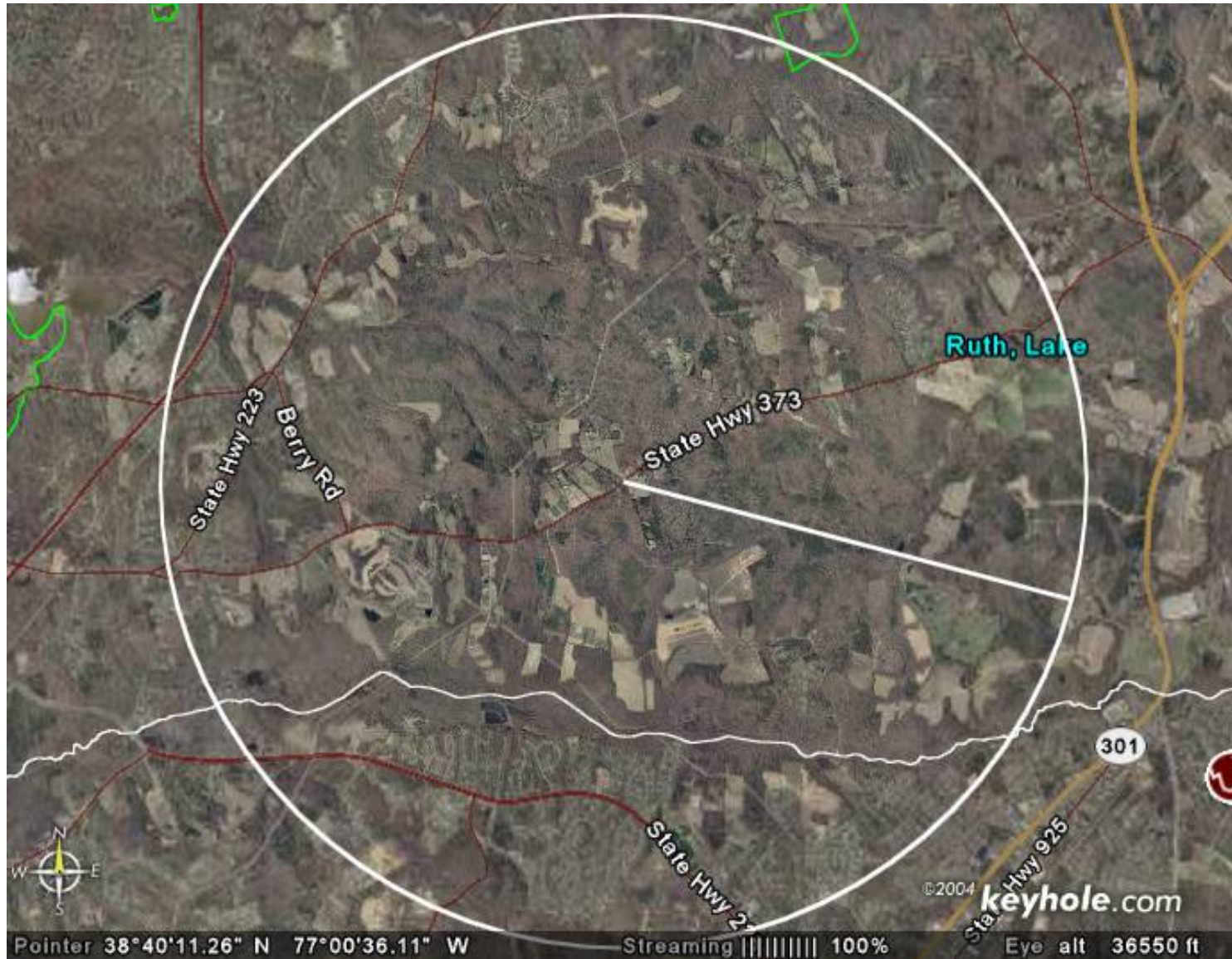
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Accokeek Road and Gardner Grocery Stores (1)



Part 7. Evaluation of Prince George's County
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Accokeek Road and Gardner Parks (0)



Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

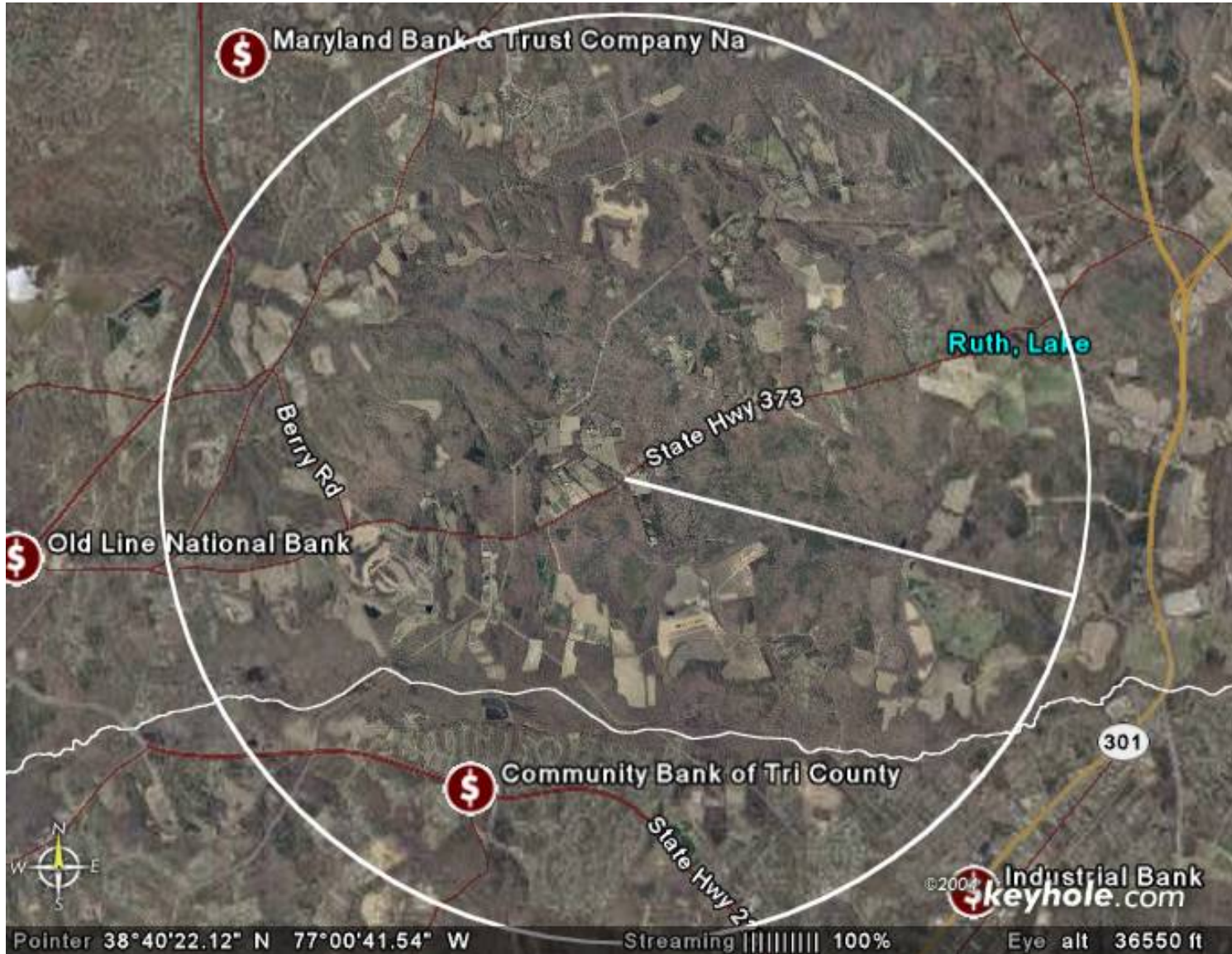
Accokeek Road and Gardner Churches (4)



Please note there may be spelling errors for various places that cannot be corrected within the mapping program.

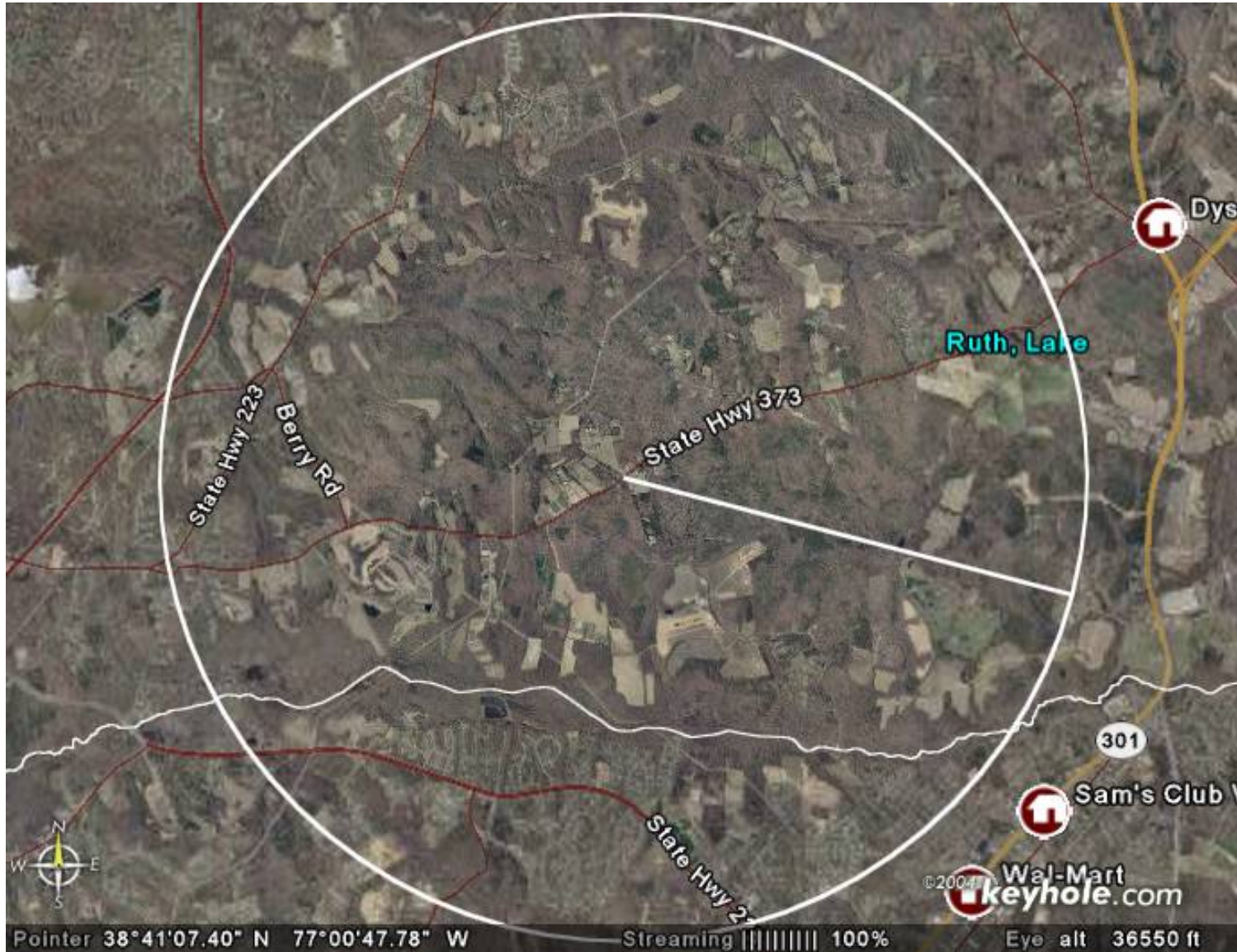
Part 7. Evaluation of Prince George's County
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Accokeek Road and Gardner Banks (1)



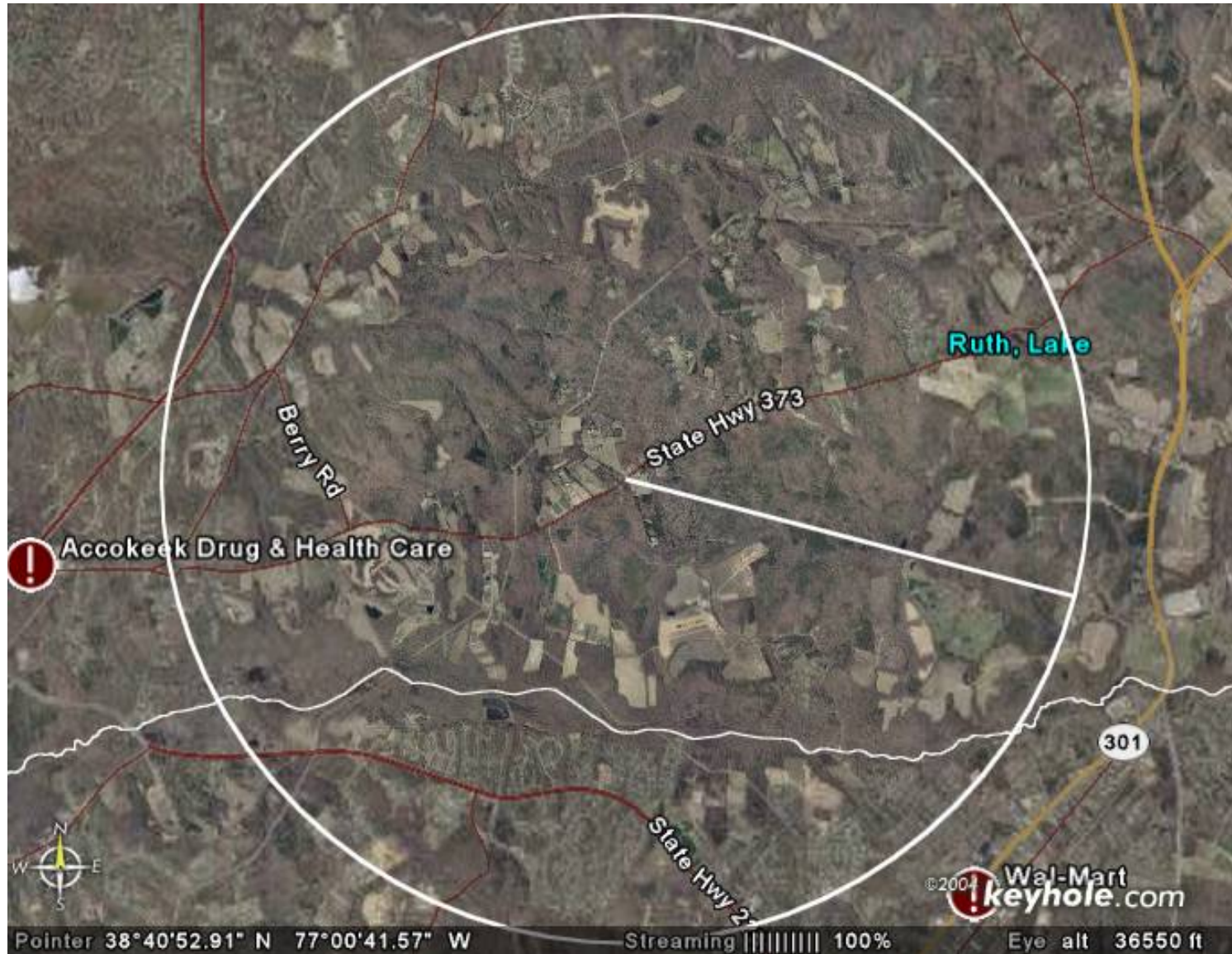
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Accokeek Road and Gardner Major Retail (0)



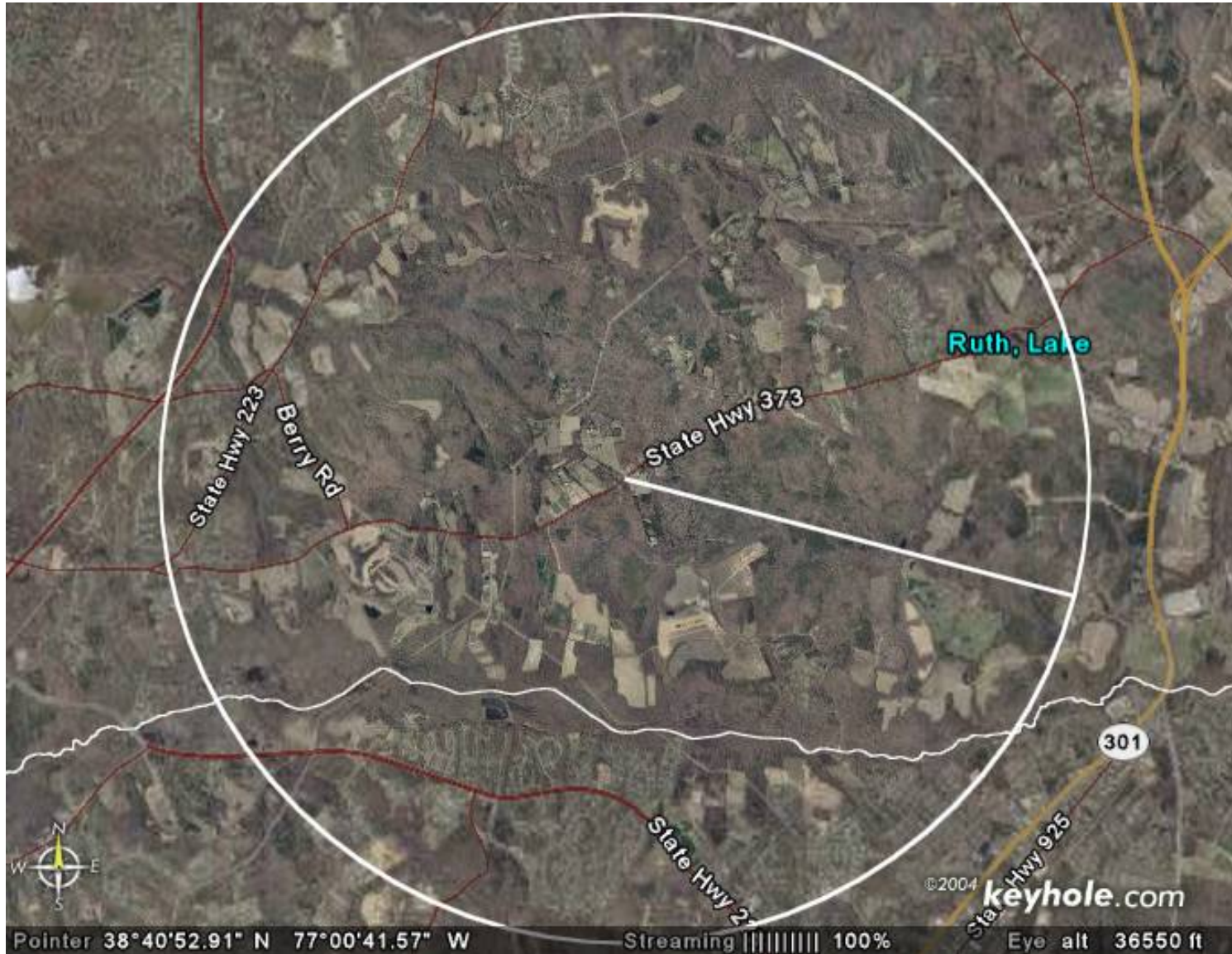
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Accokeek Road and Gardner Pharmacy (0)



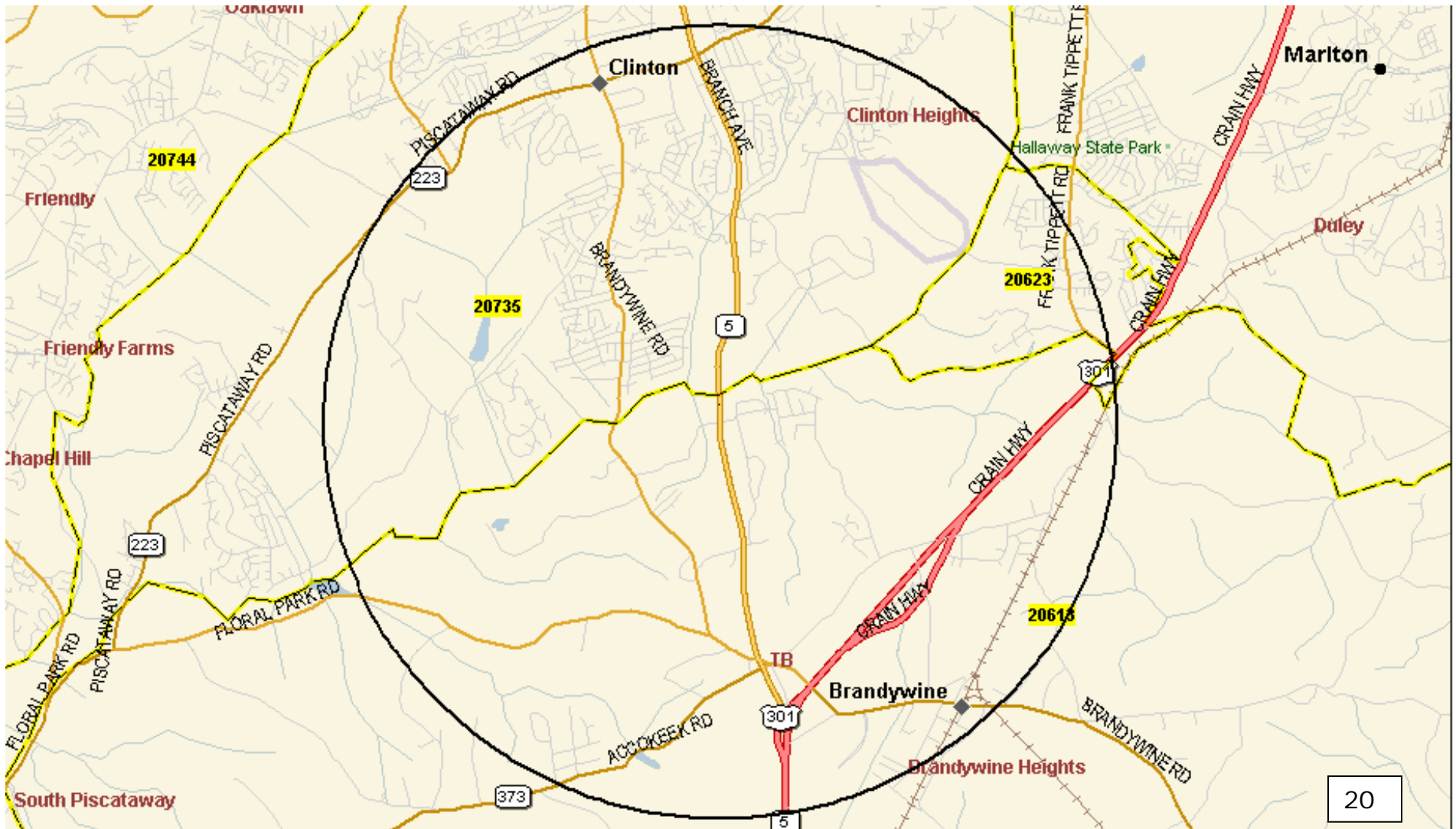
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Accokeek Road and Gardner Major Malls (0)



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Branch Avenue and Northgate Parkway
Key Market Area (3-Mile Radius) Encompassed in Location Evaluation
Zip Codes 20735, 20623 and 20613



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Potential for Active Adult Communities

Site Features Branch Avenue and Northgate Parkway						
Attribute	1	2	3	4	5	Assessment of This Site
Site appearance	No features, minimal or unsightly signage, no vegetation.	Sparse vegetation, lackluster landscaping, mediocre signage.	Average size, quantity and quality of vegetation. Good landscaping. Entrance is neutral in its effect, not good or bad.	Above average quantity and quality of vegetation and landscaping. Interesting.	Wow. Creates interest, natural, vegetation, manicured, seasonal color, established trees and vegetation, entrance makes a strong positive statement.	4-This area has good variety of vegetation and more open spaces.
Topography	Difficult to traverse, park a car, or too steep to walk.		Flat, neutral. Doesn't create problems, but little visual interest.		Gentle roll, diversity. Easy to traverse but interesting.	4.5- Between 4 and 5 depending on area. Some areas flatter with less mature vegetation. Others with good vegetation.
Drive-by traffic	None.	Minimal.	Modest, slightly below average.	Moderate or average for the market area.	Above average.	5-Branch Avenue has high traffic volume: 75,000+ daily at northern end, 60,000 at southern end.
Water features or other views	None.		Some, modest features for about 50 percent of the property. Merely a water retention pond.		Good water views or other features that will enhance views from every prospective residence on the site.	4- Good possibilities.

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Evaluation of Attributes of Branch Avenue and Northgate Parkway

Attribute	1	2	3	4	5	Score
Homes and commercial buildings in surrounding neighborhood	Poor quality. Needs upkeep, abandoned, buildings, streets and sidewalks in disrepair.		Average.	Slightly better quality.	Top quality. Well kept, landscaped, strong value. Will help attract customers.	3.5- Wide variety. Northern end more upscale than southern. Older, more run down in south. More "country" in south.
Retail, restaurants and services	More than 12-minute drive.	Between 9 and 12 minutes.	Within 5 and 8 minute drive.	Between 1 and 5 minutes.	1 minute drive and walking distance.	4-14 within 3 miles. One within 2 minutes.
Emergency medical	More than 12-minute drive.	Between 9 and 12 minutes.	Within 5 and 8 minute drive.	Between 1 and 5 minutes.	1 minute drive and walking distance.	4-Southern Maryland Hospital Center 1.42 miles, 2 minutes.
Major Medical	More than 20-minute drive.	Between 16 and 20 minutes.	Within 11 and 15 minute drive.	Between 6 and 10 minutes.	5 minute drive.	5-Southern Maryland Hospital Center. 1.42 miles, 2 minutes.
Adult Education University/Community College	More than 20-minute drive.	Between 16 and 20 minutes.	Within 11 and 15 minute drive.	Between 6 and 10 minutes.	1 to 5 minute drive.	3-Strayer University. 7.22 miles, 15 minutes.
Interstate/public transit access	More than 15-minute drive	Between 11 and 15 minutes.	Within 6 and 10 minute drive.	Between 4 and 6 minutes.	1 to 3 minute drive.	2- I-95 7.75 miles, 15 minutes. Railroad, Taxi/Limo. Within 3 miles.
Recreation within 10 minutes: participatory sports, spectator sports, movies, outdoor recreation fishing, swimming, hiking, boating, bicycling	None.	One to two recreational forms.	Three to four.	Four to five.	Full complement of recreational forms: Outdoor participatory, outdoor spectator, indoor participatory, indoor spectator.	5-Several parks. Within 3 miles.
Cultural opportunities within 10 minutes: theater, music, dance, visual arts, literary arts	None.	One to two facilities offer quality programming.	Three to four facilities offer quality programming.	Four to five facilities offer quality programming.	More than five facilities offer quality programming.	2-Several museums/art galleries. Within 3 miles.
Airport	More than 2 ½ hours.	1 ½ to 2 ½ hours.	Within 1 to 1 ½ hours.	Within 30 to 59 minutes.	Within 30 minutes.	4-Ronald Reagan. 18.94 miles, 33 minutes.

Part 7. Evaluation of Prince George's County Potential for Active Adult Communities

Annual Demand for Active Adult Communities in a 3-Mile Radius from Branch Avenue and Northgate Parkway Road, 2009

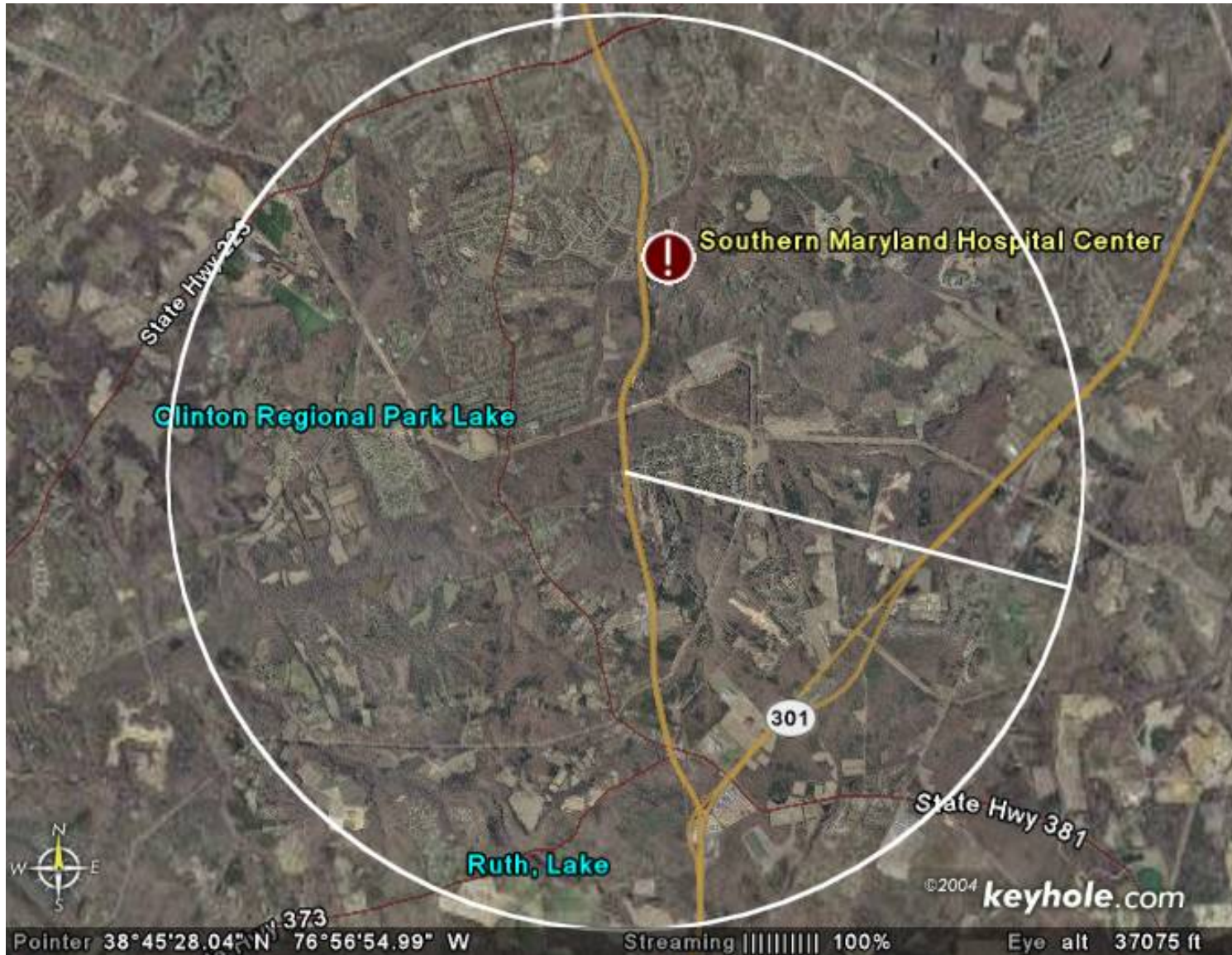
This table reveals that in 2009 among the age- and home-value-qualified households (home values of \$80,000 or more), there are an estimated 149 households within the PMA likely to move and choose an age-qualified community. There are 2 households with a home valued between \$100,000 and \$199,999; and 146 households with homes valued at \$200,000 or more likely to move to an age-qualified community within the defined market each year.

Total	\$100,000 to \$200,000	\$200,000+
149	2	146

Demand for Active Adult Communities in a 3-Mile Radius from Branch Avenue and Northgate Parkway, 2009	TOTAL	\$80,000 to \$99,999	\$100,000 to \$149,999	\$150,000 to \$199,999	\$200,000 to \$299,999	\$300,000 to \$399,999	\$400,000 to \$499,999	\$500,000 +
Number of Households in County	7,778							
Percent of Age-Qualified Households	31%							
Number of Age-Qualified Households in PMA	2,398.43							
% of Households with a Qualified Existing Home Value	99.0%	0.3%	0.1%	1.4%	9.2%	66.5%	17.5%	3.9%
Number of Age- and Home-Value-Qualified Households	7,044	23	6	102	654	4,737	1,247	275
Annual Turnover Rate	9.6%	9.6%	9.6%	9.6%	9.6%	9.6%	9.6%	9.6%
Annual Turnover (Units)	676	2	1	10	63	455	120	26
Percentage Likely to Remain in PMA	90%	90%	90%	90%	90%	90%	90%	90%
Number Likely to Remain in PMA	609	2	1	9	57	409	108	24
Percent Interested in an Age-Qualified Community	24.5%	24.5%	24.5%	24.5%	24.5%	24.5%	24.5%	24.5%
Demand for Age-Qualified Community in Units	149	0	0	2	14	100	26	6

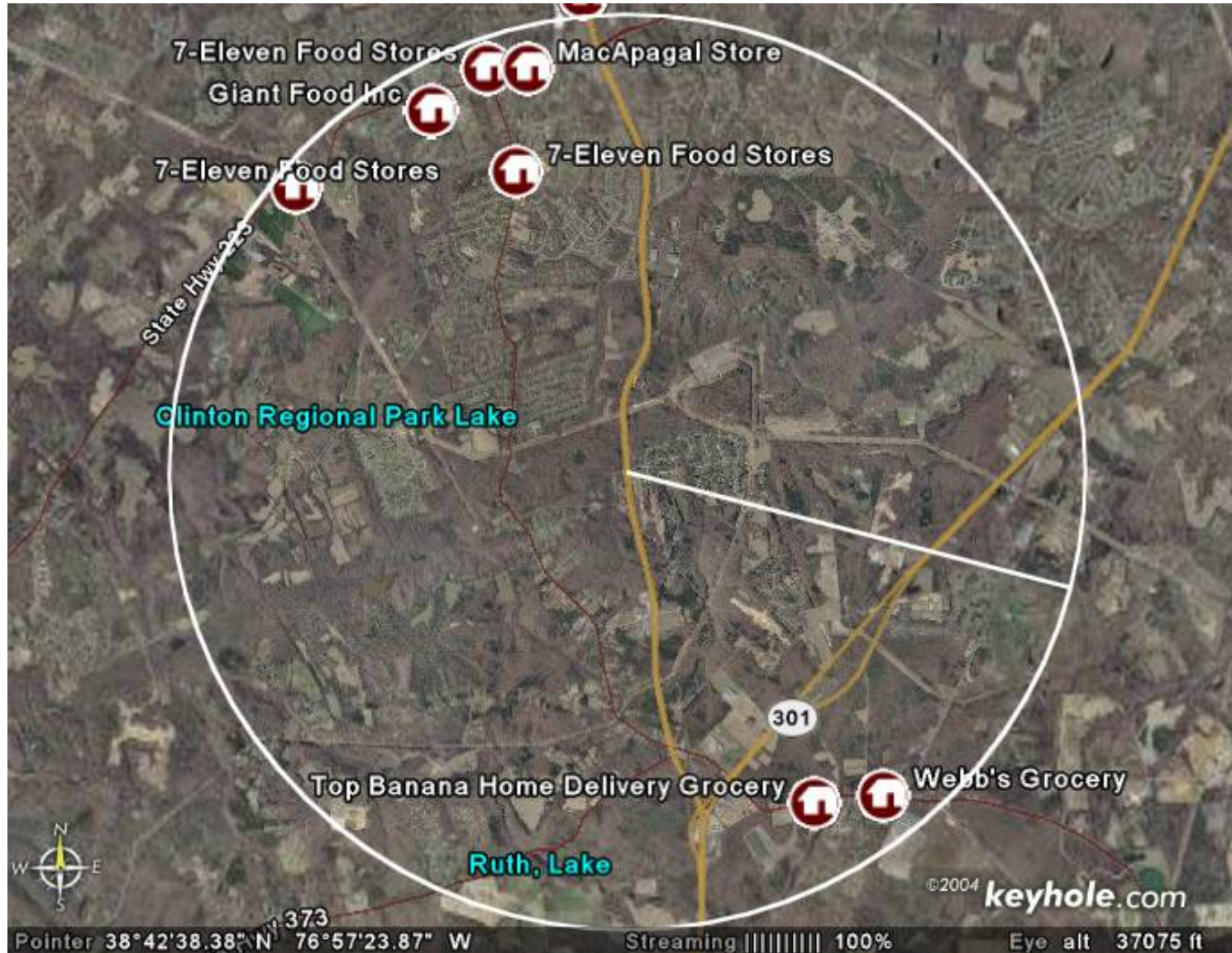
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Branch Avenue and Northgate Parkway Hospital and Fire (1)



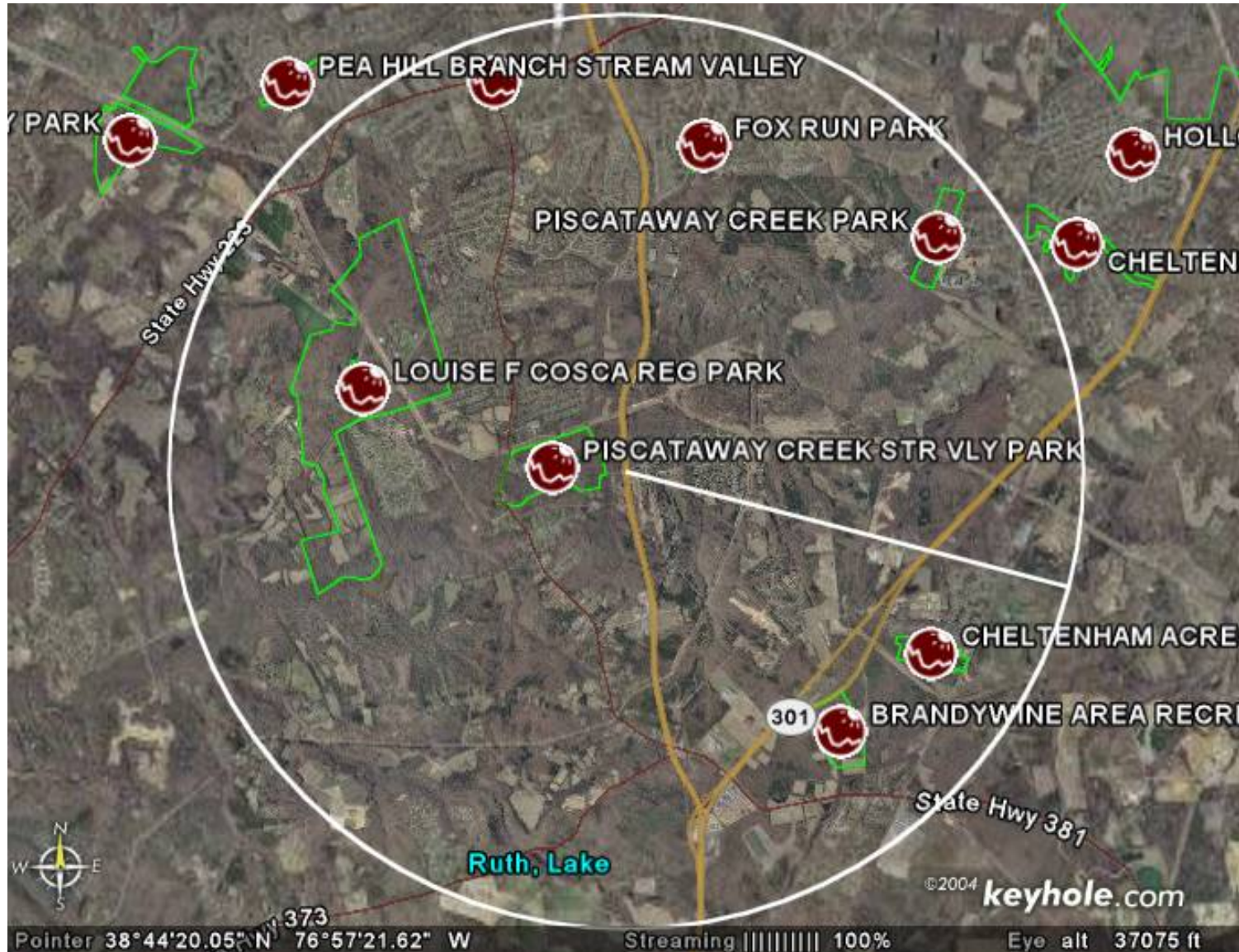
Part 7. Evaluation of Prince George's County
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Branch Avenue and Northgate Parkway Grocery Stores (7)



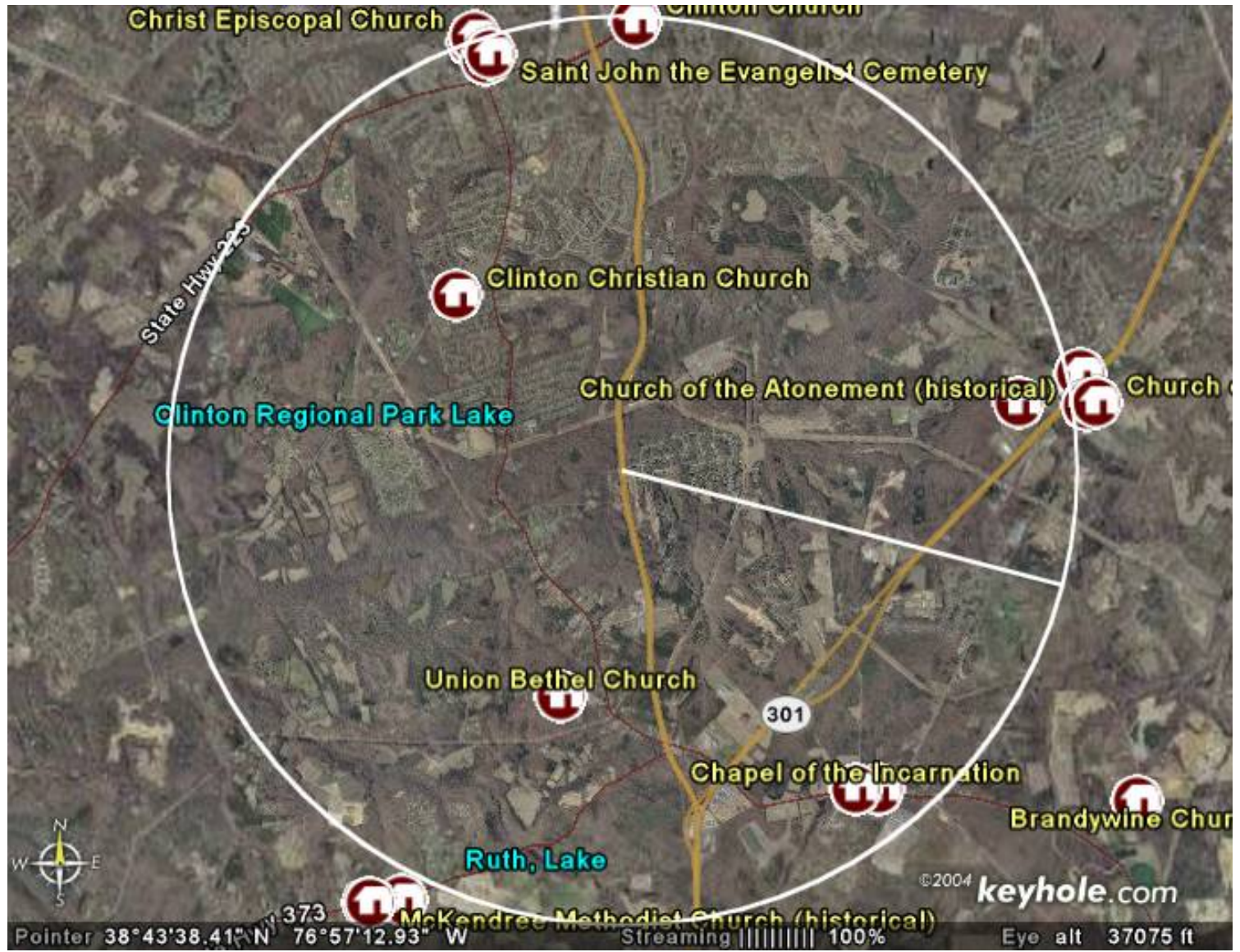
Part 7. Evaluation of Prince George's County
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Branch Avenue and Northgate Parkway Parks (7)



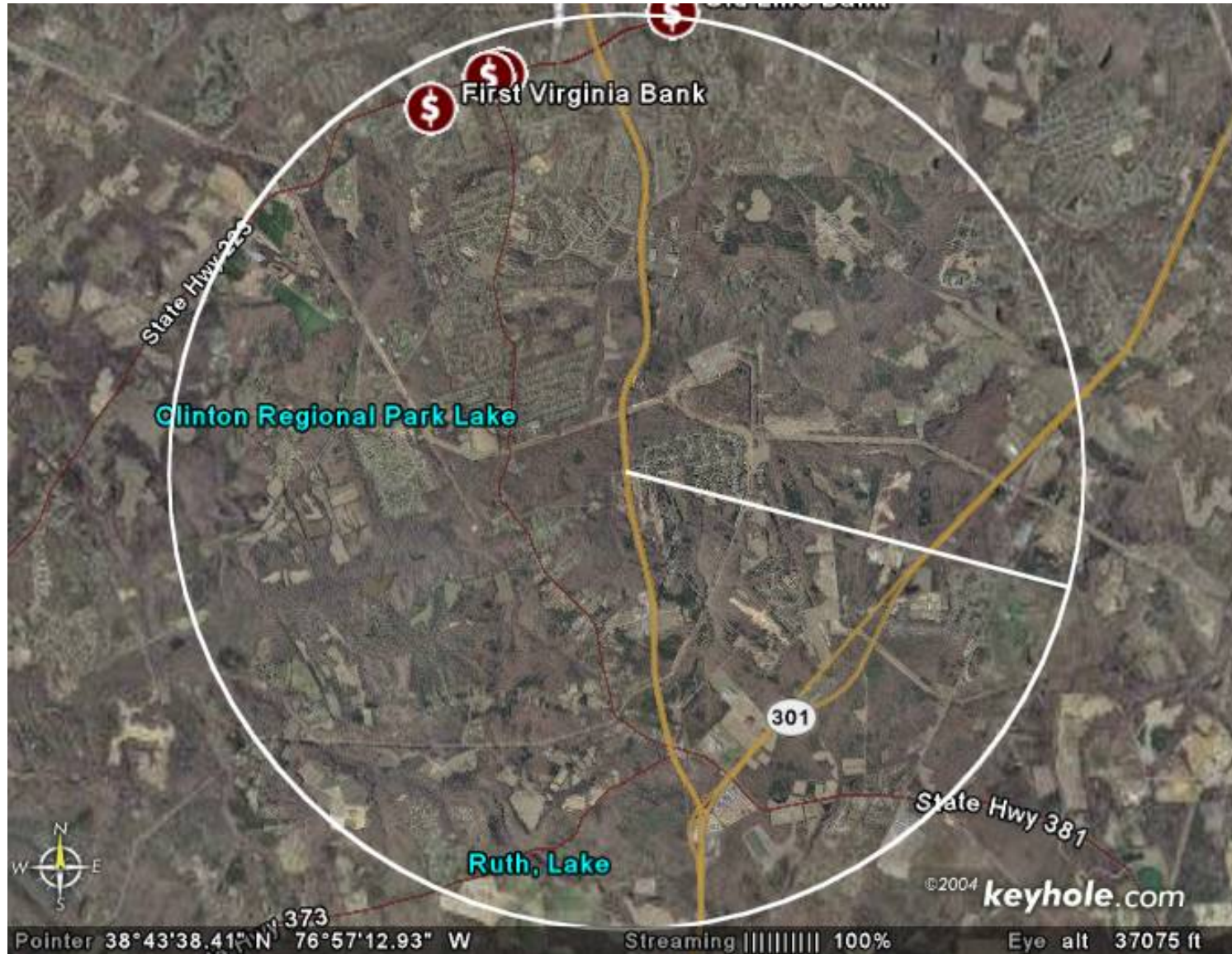
Part 7. Evaluation of Prince George's County
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Branch Avenue and Northgate Parkway Churches (6)



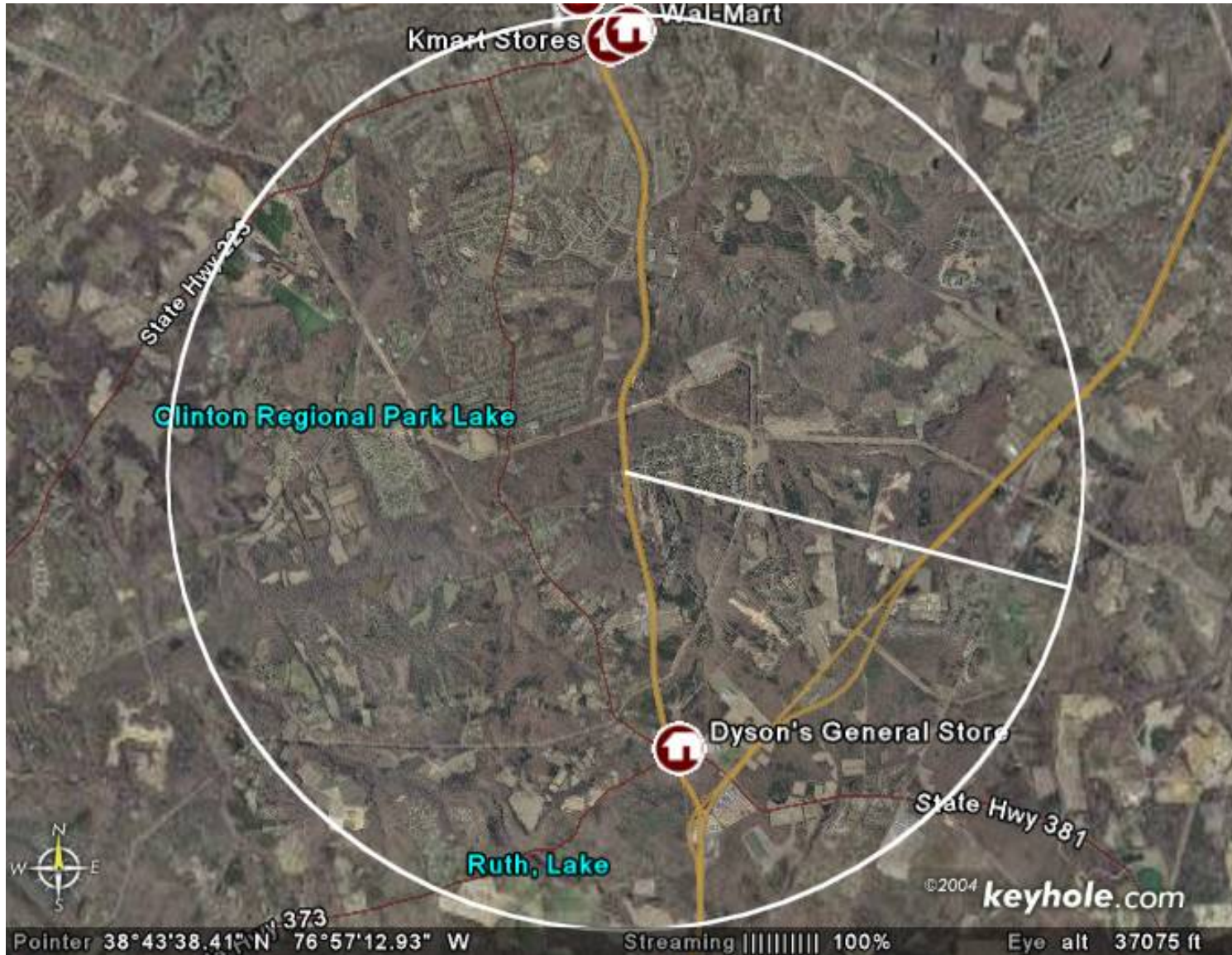
Part 7. Evaluation of Prince George's County
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Branch Avenue and Northgate Parkway Banks (3)



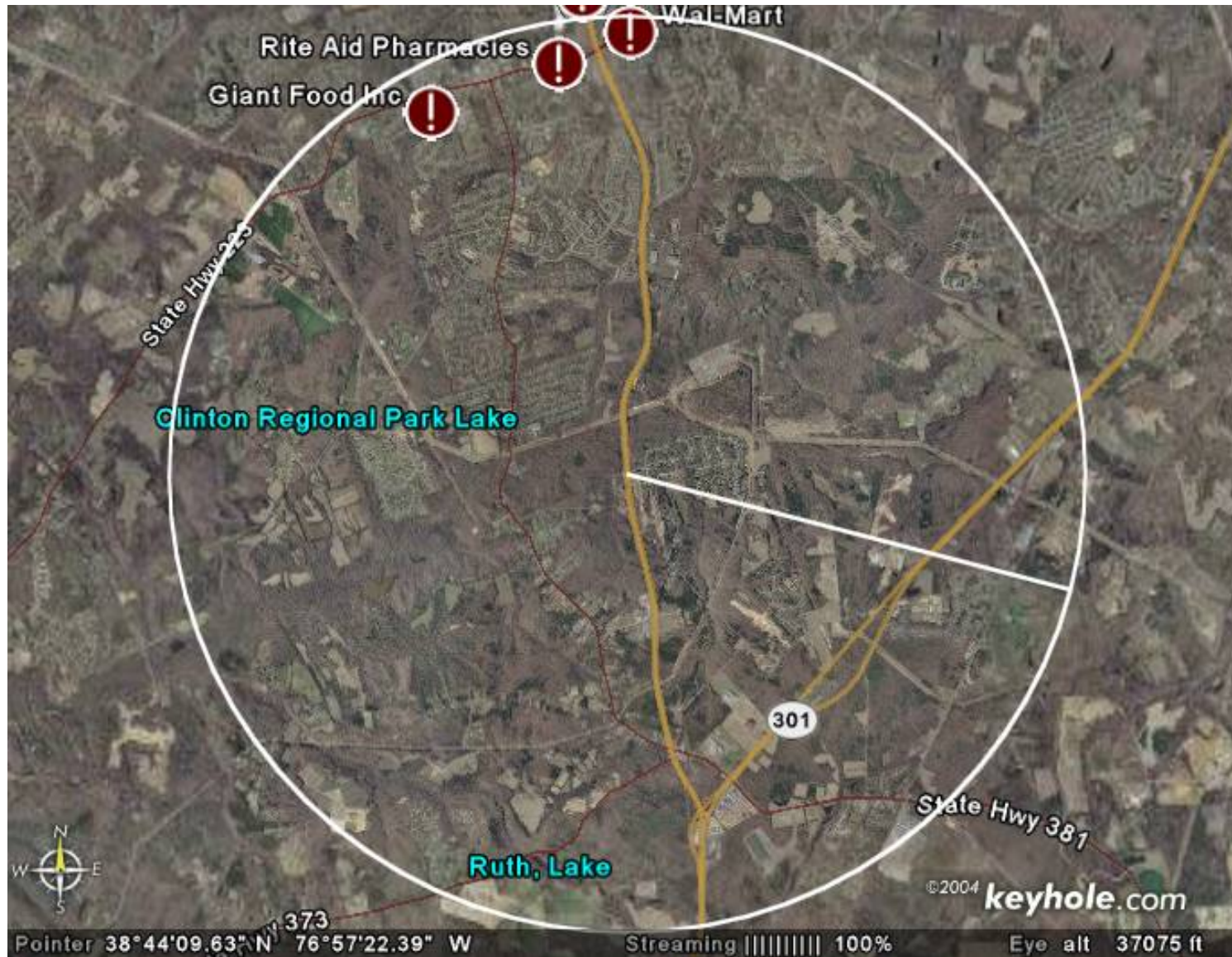
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Branch Avenue and Northgate Parkway Major Retail (3)



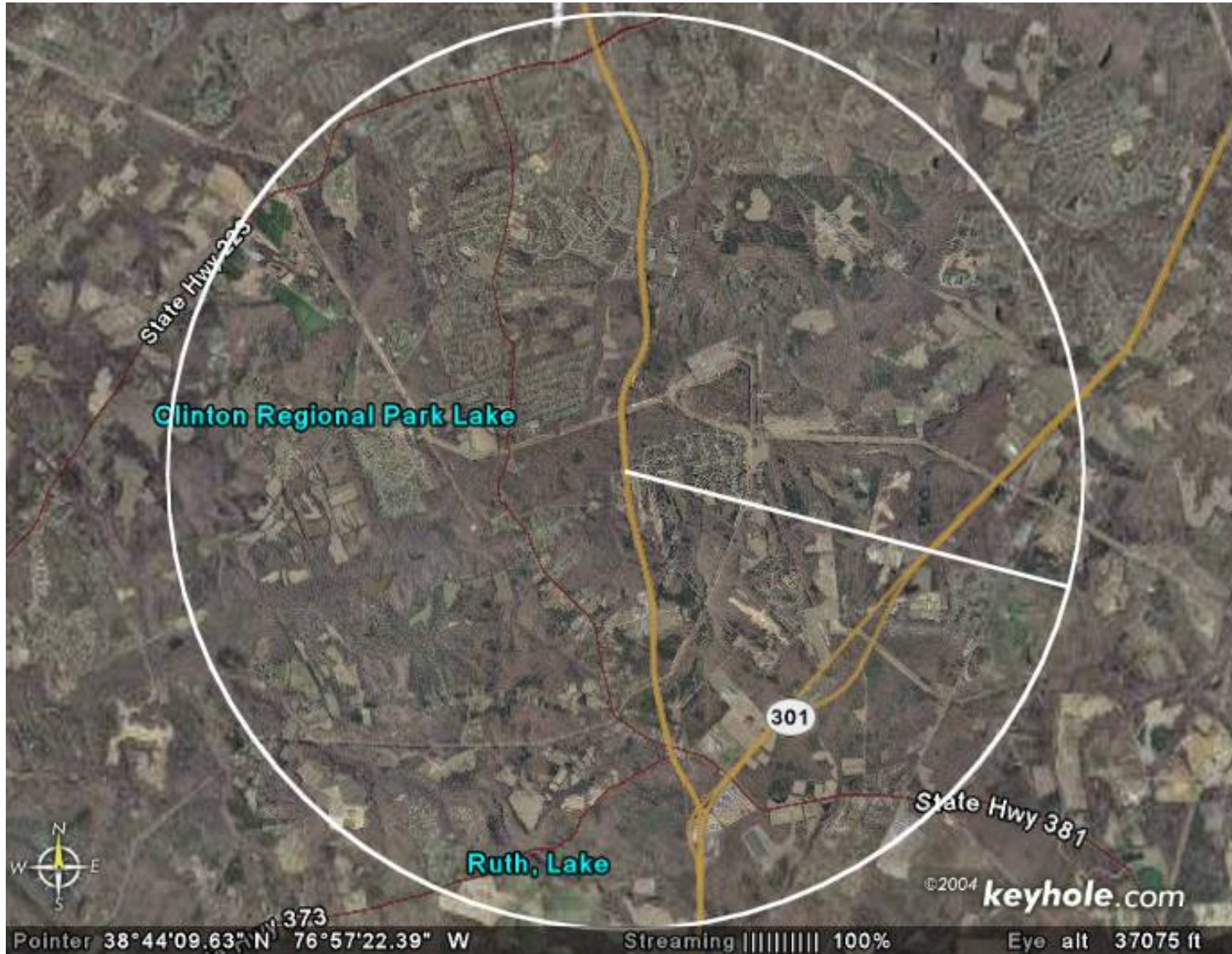
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Branch Avenue and Northgate Parkway Pharmacy (3)



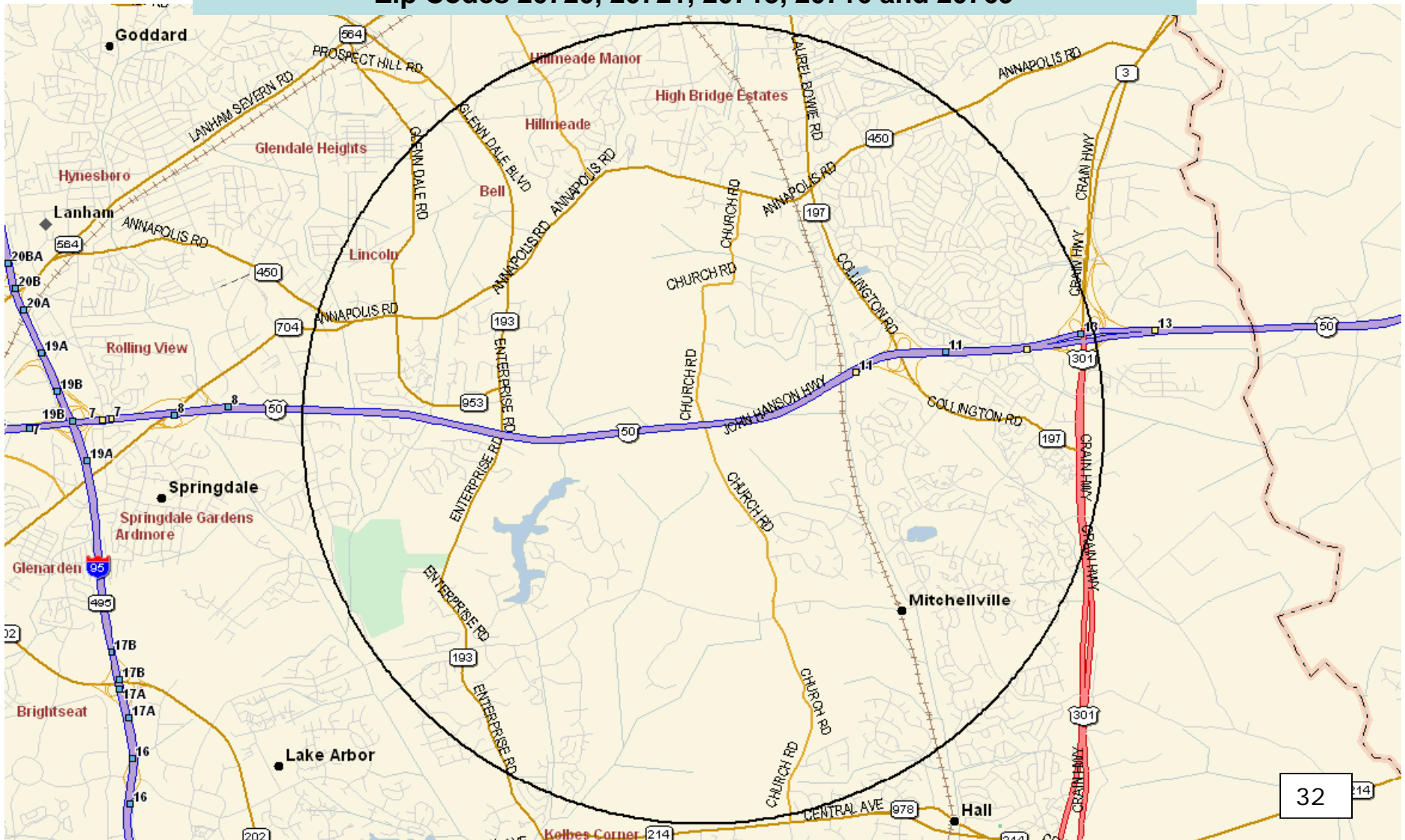
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Branch Avenue and Northgate Parkway Major Malls (0)



Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Church Road and John Hanson Highway
Key Market Area (3-Mile Radius) Encompassed in Location Evaluation
Zip Codes 20720, 20721, 20715, 20716 and 20769



Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Site Features Church Road and John Hanson Highway

Attribute	1	2	3	4	5	Assessment of This Site
Site appearance	No features, minimal or unsightly signage, no vegetation.	Sparse vegetation, lackluster landscaping, mediocre signage.	Average size, quantity and quality of vegetation. Good landscaping. Entrance is neutral in its effect, not good or bad.	Above average quantity and quality of vegetation and landscaping. Interesting.	Wow. Creates interest, natural, vegetation, manicured, seasonal color, established trees and vegetation, entrance makes a strong positive statement.	5- A very pretty area with lots of green space.
Topography	Difficult to traverse, park a car, or too steep to walk.		Flat, neutral. Doesn't create problems, but little visual interest.		Gentle roll, diversity. Easy to traverse but interesting.	5-Good variety, nice diversity.
Drive-by traffic	None.	Minimal.	Modest, slightly below average.	Moderate or average for the market area.	Above average.	5- 592,229 John Hanson Highway has over 250,000+ daily on both the north and south ends.
Water features or other views	None.		Some, modest features for about 50 percent of the property. Merely a water retention pond.		Good water views or other features that will enhance views from every prospective residence on the site.	5- Good possibilities

**Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities**

Evaluation of Attributes of Church Road and John Hanson Highway

Attribute	1	2	3	4	5	Score
Homes and commercial buildings in surrounding neighborhood	Poor quality. Need upkeep, abandoned, buildings, streets and sidewalks in disrepair.		Average.	Slightly better quality.	Top quality. Well kept, landscaped, strong value. Will help attract customers.	4- Some nice homes in the area. Lots of initial stages of development. Northern end more established.
Retail, restaurants and services	More than 12-minute drive.	Between 9 and 12 minutes.	Within 5 and 8 minute drive.	Between 1 and 5 minutes.	1-minute drive and walking distance.	4-25 within 3 miles. One within 5 minutes.
Emergency medical	More than 12-minute drive.	Between 9 and 12 minutes.	Within 5 and 8 minute drive.	Between 1 and 5 minutes.	1-minute drive and walking distance.	1-Bowie Health Center 5.3 miles, 13 minutes.
Major Medical	More than 20-minute drive.	Between 16 and 20 minutes.	Within 11 and 15 minute drive.	Between 6 and 10 minutes.	5-minute drive.	3-Bowie Health Center 5.3 miles, 13 minutes.
Adult Education University/Community College	More than 20-minute drive.	Between 16 and 20 minutes.	Within 11 and 15 minute drive.	Between 6 and 10 minutes.	1 to 5 minute drive.	3-Bowie State University 5.87 miles, 14 minutes.
Interstate/public transit access	More than 15-minute drive.	Between 11 and 15 minutes.	Within 6 and 10 minute drive.	Between 4 and 6 minutes.	1 to 3 minute drive.	1- I-95 11.71 miles, 19 minutes. Railroad, Bus, Taxi/Limo. Within 3 miles.
Recreation within 10 minutes: participatory sports, spectator sports, movies, outdoor recreation fishing, swimming, hiking, boating, bicycling	None.	One to two recreational forms.	Three to four.	Four to five.	Full complement of recreational forms: Outdoor participatory, outdoor spectator, indoor participatory, indoor spectator.	5-Multiple parks, outdoor swimming. Within 3 miles.
Cultural opportunities within 10 minutes: theater, music, dance, visual arts, literary arts	None.	One to two facilities offer quality programming.	Three to four facilities offer quality programming.	Four to five facilities offer quality programming.	More than five facilities offer quality programming.	5-several theaters, Music, dance. Within 3 miles.
Airport	More than 2 ½ hours.	1 ½ to 2 ½ hours.	Within 1 to 1 ½ hours.	Within 30 to 59 minutes.	Within 30 minutes.	4- Ronald Reagan. 26.21 miles, 39 minutes.

Part 7. Evaluation of Prince George's County Potential for Active Adult Communities

Annual Demand for Active Adult Communities in a 3-Mile Radius from Church Road and John Hanson Highway, 2009

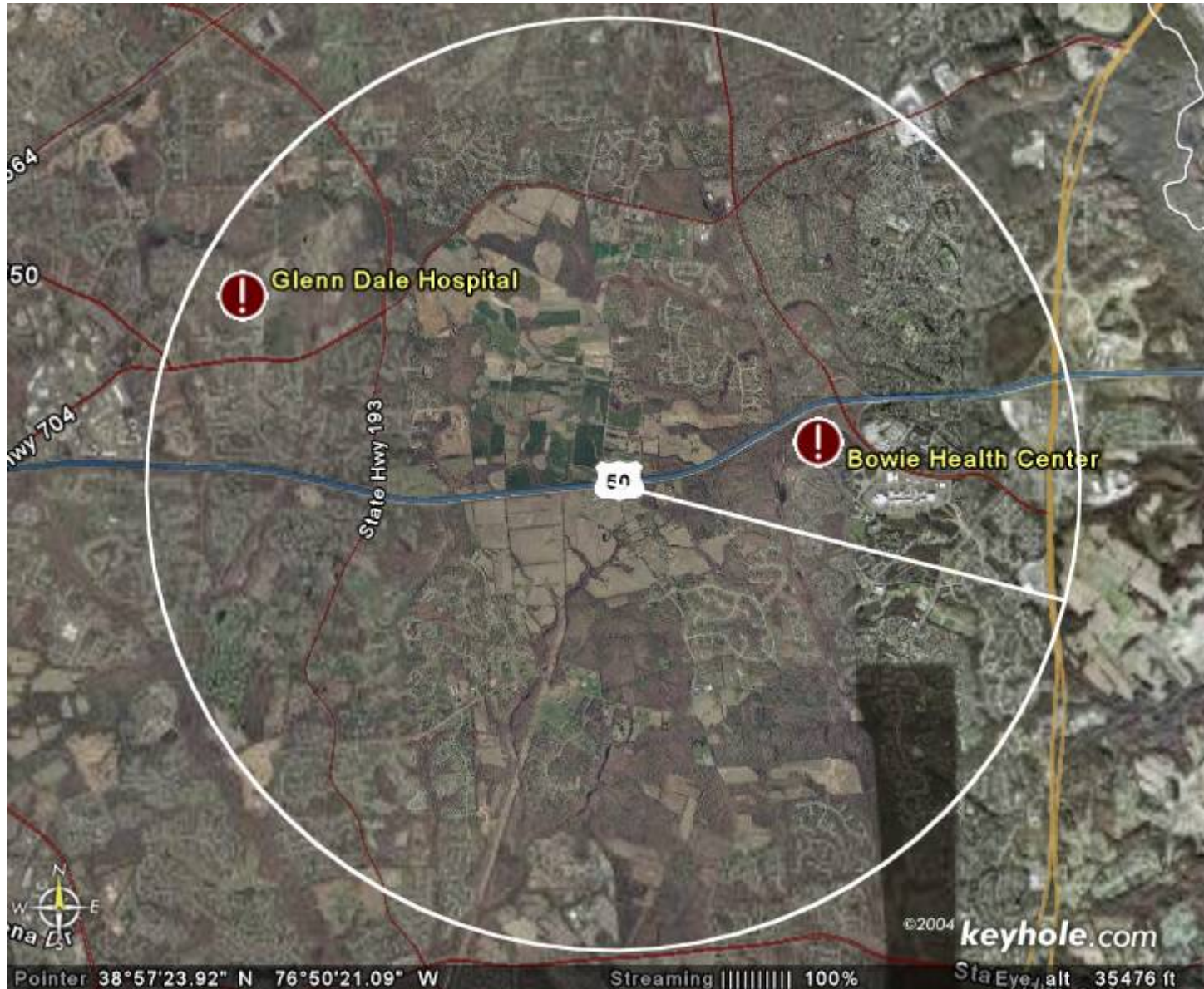
This table reveals that in 2009 among the age and home-value-qualified households (home values of \$80,000 or more), there are an estimated 347 households within the PMA likely to move and choose an age-qualified community. There are 3 households with a home valued between \$100,000 and \$199,999; and 343 households with homes valued at \$200,000 or more likely to move to an age-qualified community within the defined market each year.

Summary of Demand in Households by Home Value		
Total	\$100,000 to \$200,000	\$200,000+
347	3	343

Demand for Active Adult Communities in a 3-Mile Radius from Church Road and John Hanson Highway, 2009	TOTAL	\$80,000 to \$99,999	\$100,000 to \$149,999	\$150,000 to \$199,999	\$200,000 to \$299,999	\$300,000 to \$399,999	\$400,000 to \$499,999	\$500,000 +
Number of Households in County	19,334							
Percent of Age-Qualified Households	31%							
Number of Age-Qualified Households in PMA	5,961.85							
% of Households with a Qualified Existing Home Value	99.1%	0.0%	0.1%	0.8%	9.9%	48.7%	21.8%	17.9%
Number of Age- and Home-Value-Qualified Households	16,388	7	8	130	1,639	8,046	3,597	2,961
Annual Turnover Rate	9.6%	9.6%	9.6%	9.6%	9.6%	9.6%	9.6%	9.6%
Annual Turnover (Units)	1,573	1	1	12	157	772	345	284
Percentage Likely to Remain in PMA	90%	90%	90%	90%	90%	90%	90%	90%
Number Likely to Remain in PMA	1,416	1	1	11	142	695	311	256
Percent Interested in an Age-Qualified Community	24.5%	24.5%	24.5%	24.5%	24.5%	24.5%	24.5%	24.5%
Demand for Age-Qualified Community in Units	347	0	0	3	35	170	76	63

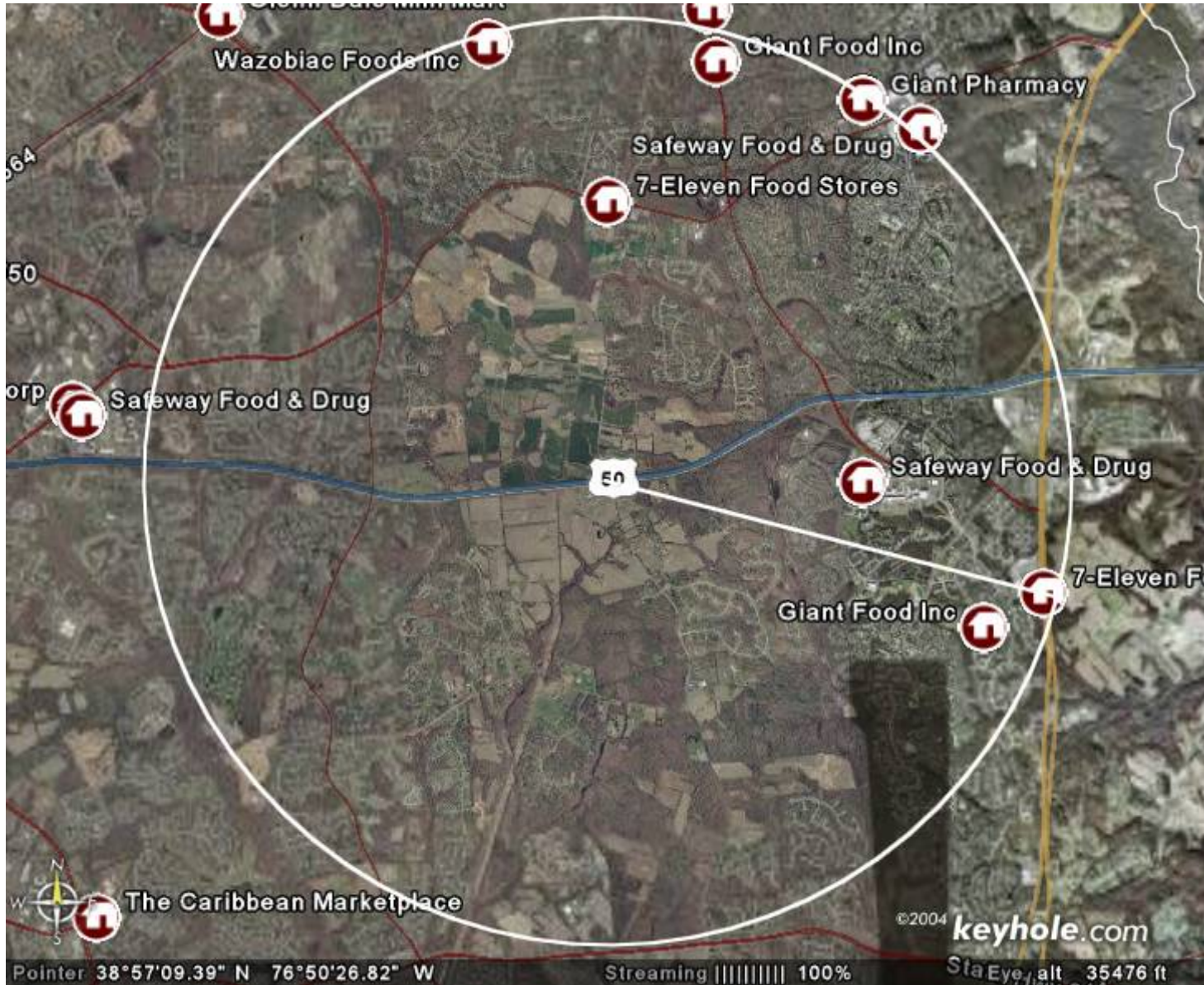
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Church Road and John Hanson Highway Hospital and Fire (2)



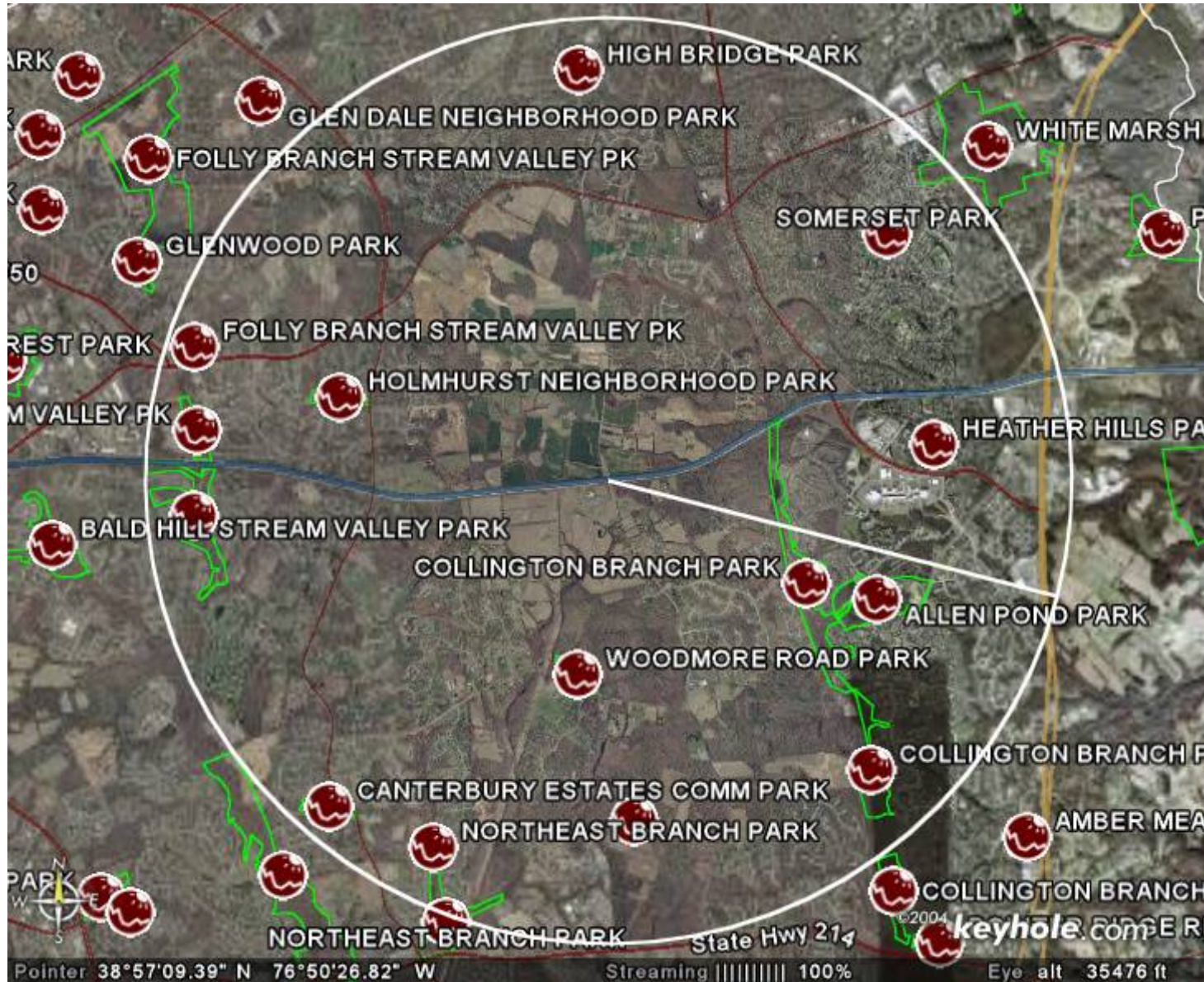
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Church Road and John Hanson Highway Grocery Stores (7)



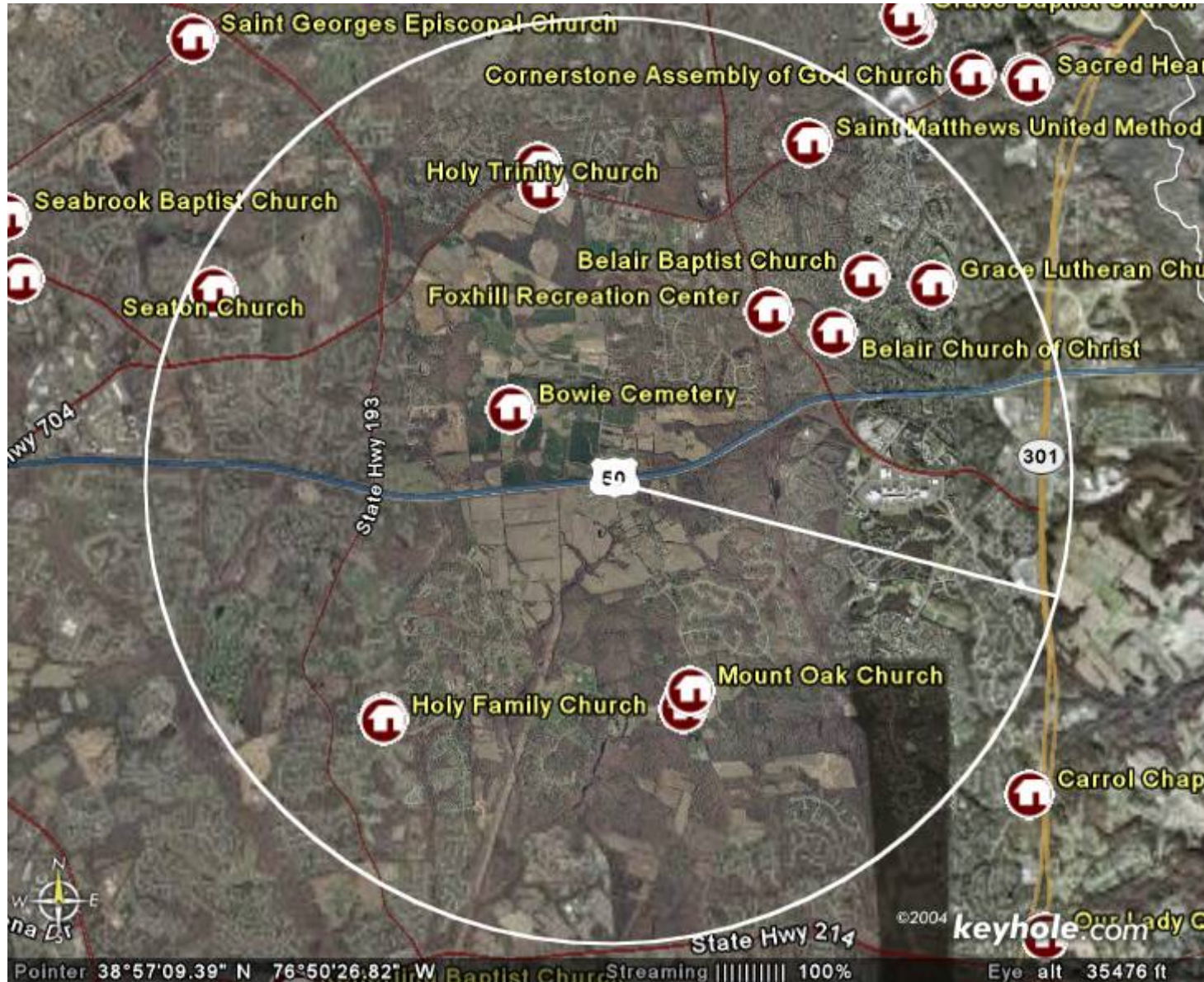
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Church Road and John Hanson Highway Parks (14)



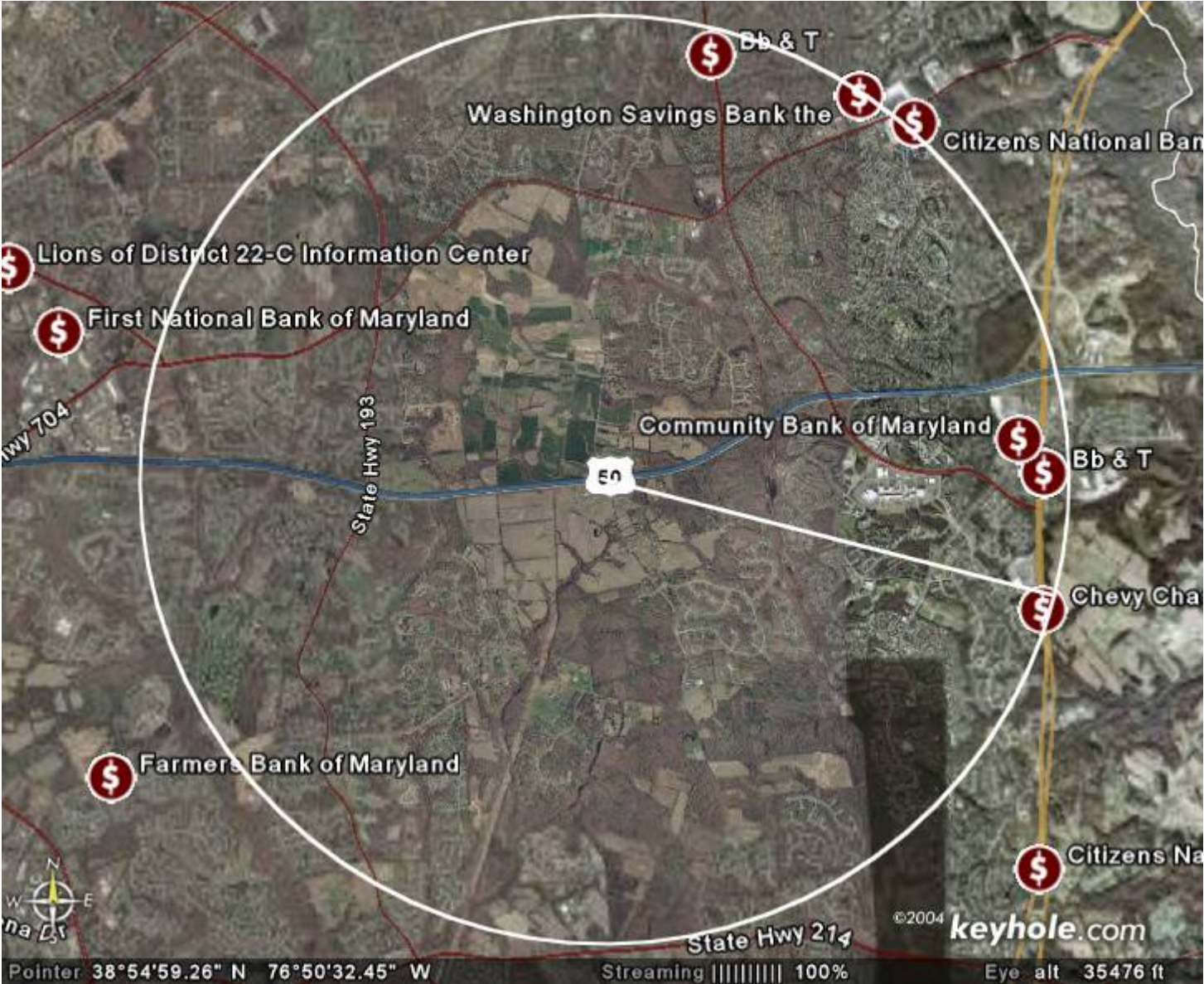
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Church Road and John Hanson Highway Churches (9)



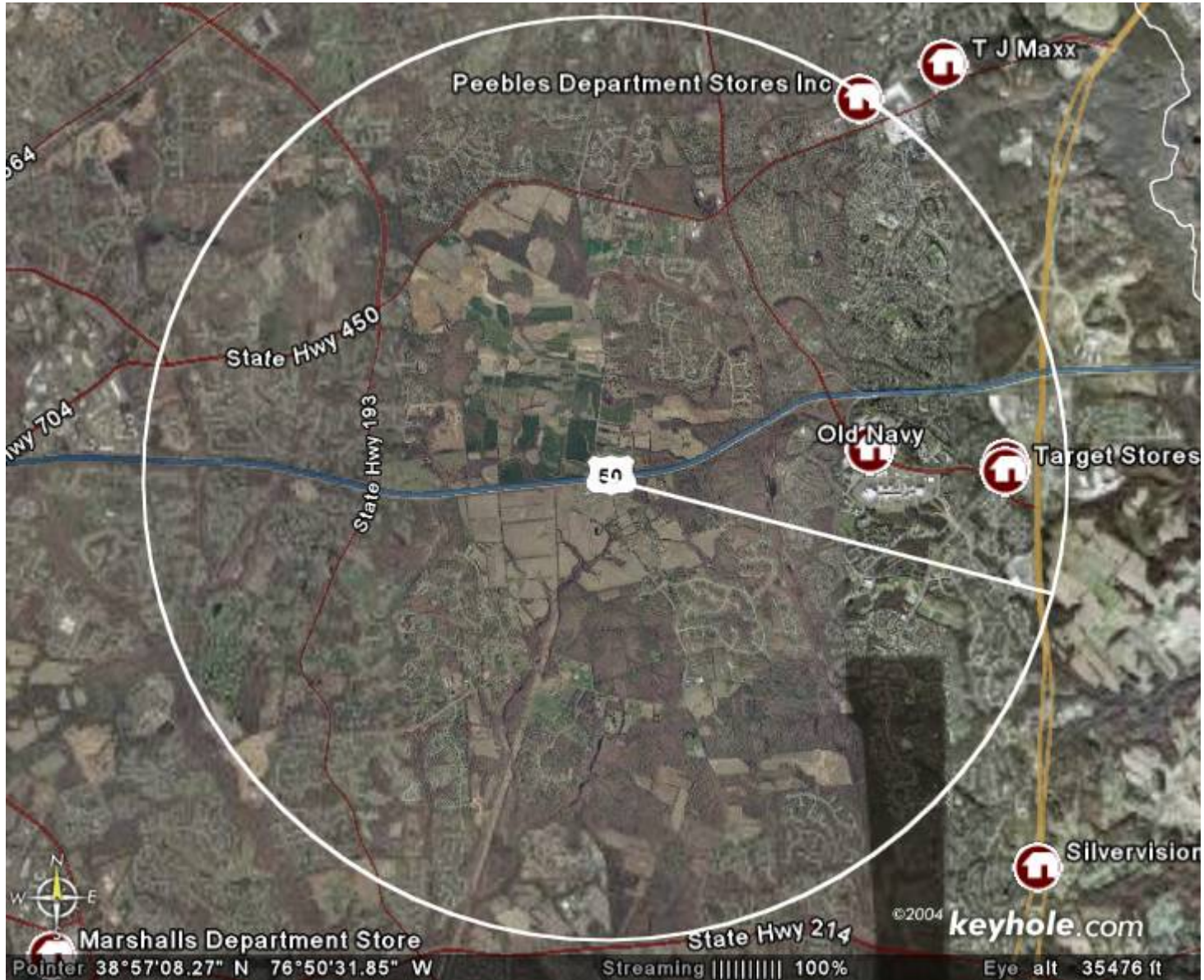
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Church Road and John Hanson Highway Banks (5)



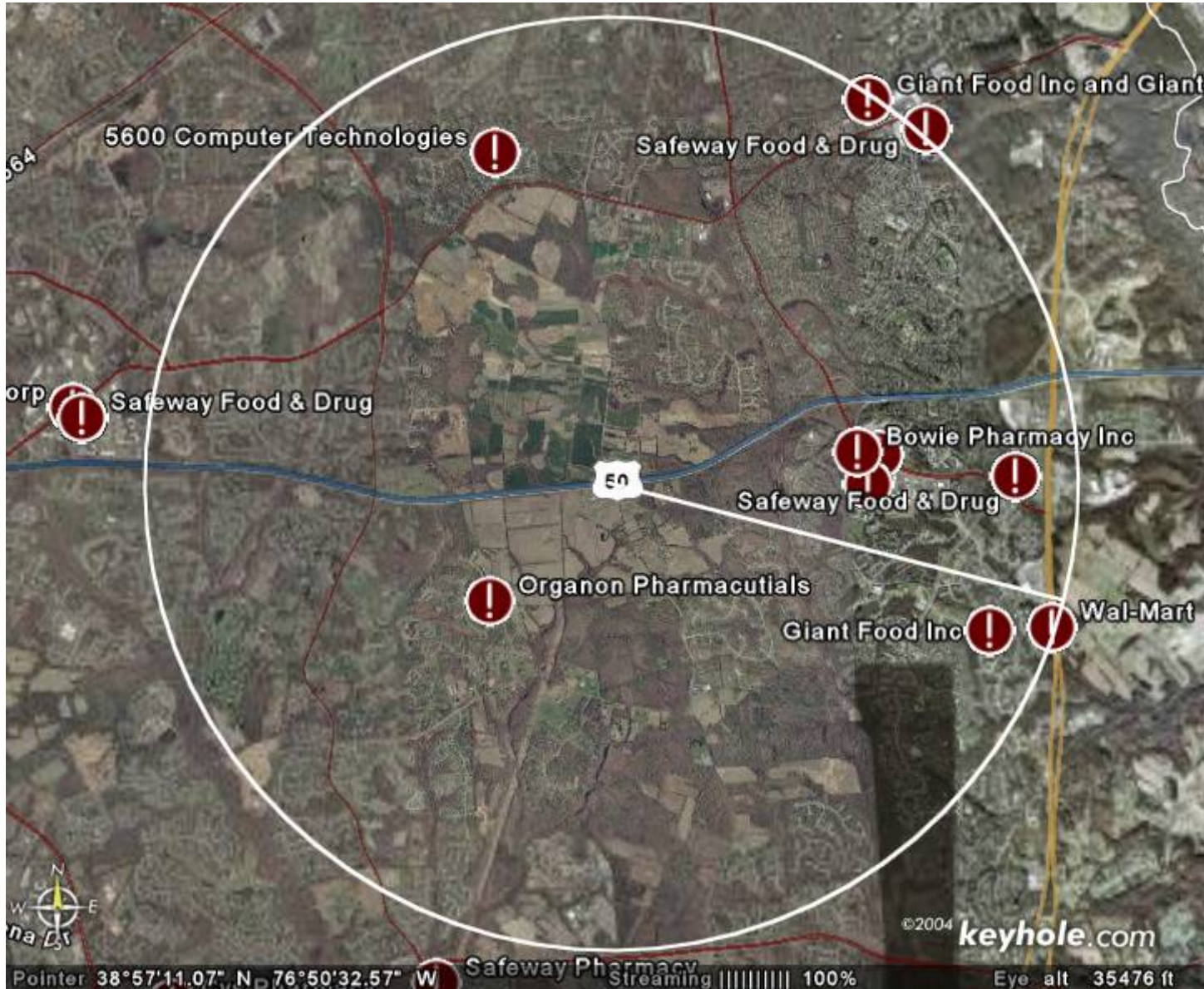
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Church Road and John Hanson Highway Major Retail (4)



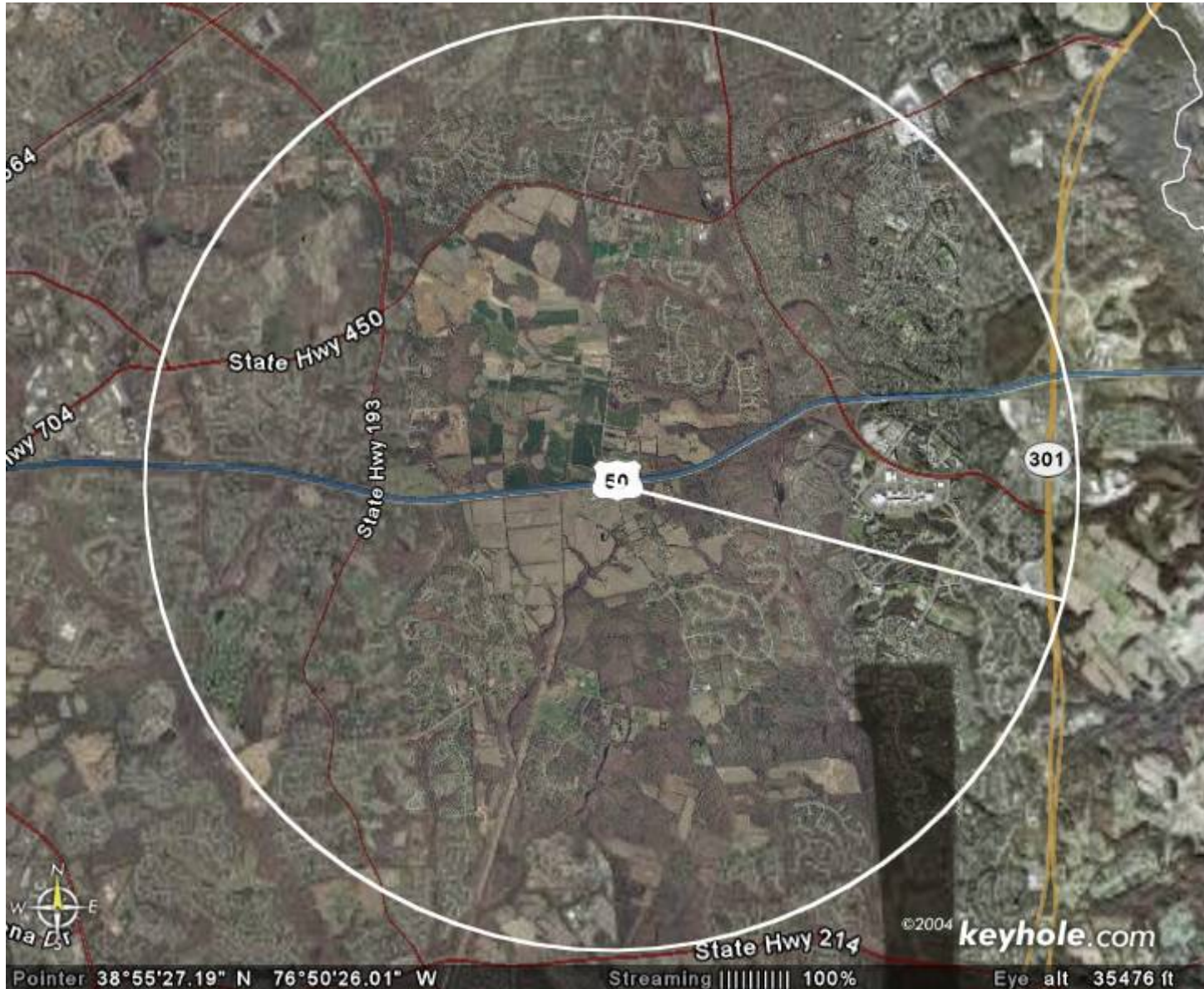
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Church Road and John Hanson Highway Pharmacy (9)



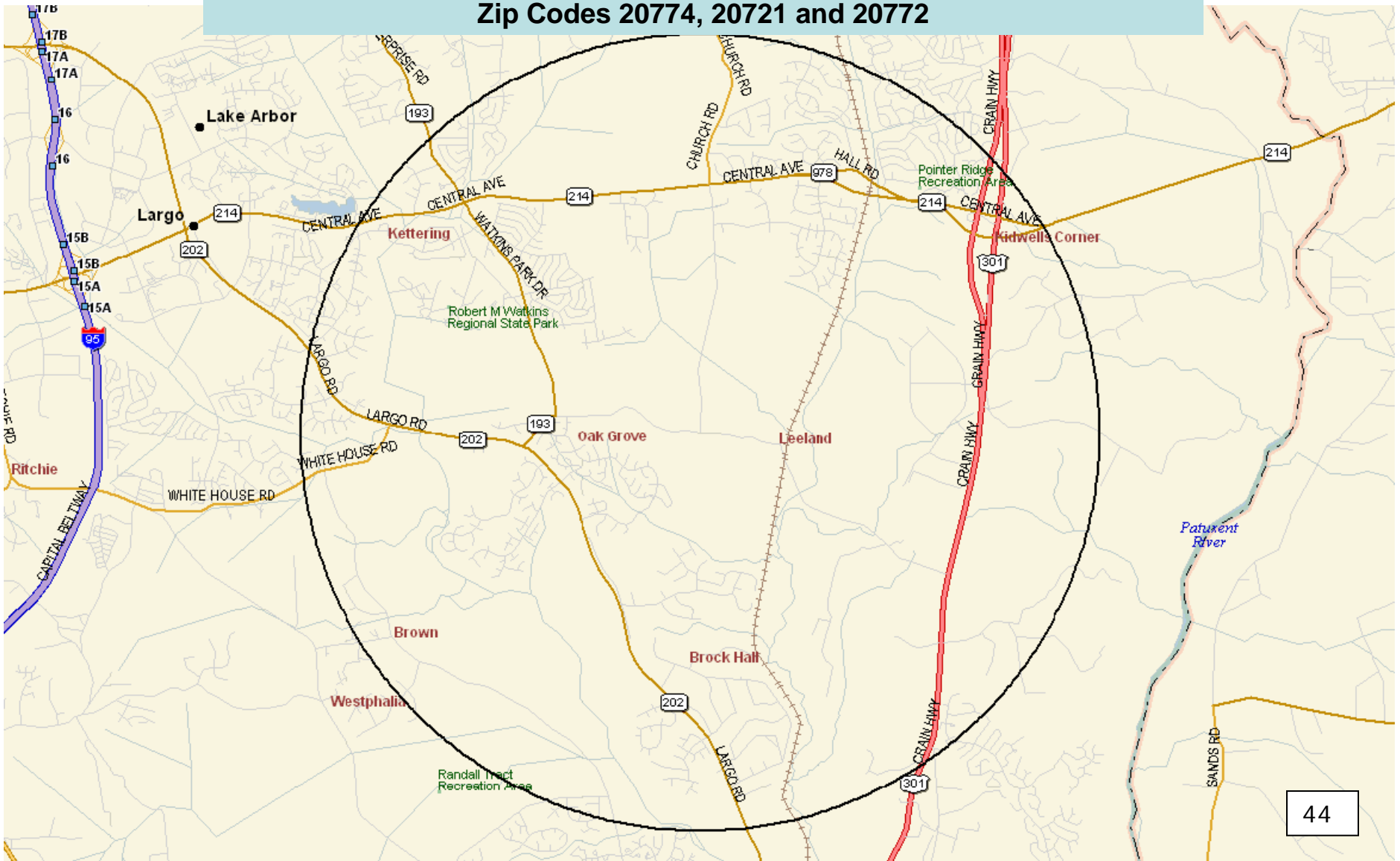
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Church Road and John Hanson Highway Major Malls (0)



Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Church Road and Oak Grove Road
Key Market Area (3-Mile Radius) Encompassed in Location Evaluation
Zip Codes 20774, 20721 and 20772



Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Site Features Church Road and Oak Grove Road						
Attribute	1	2	3	4	5	Assessment of This Site
Site appearance	No features, minimal or unsightly signage, no vegetation.	Sparse vegetation, lackluster landscaping, mediocre signage.	Average size, quantity and quality of vegetation. Good landscaping. Entrance is neutral in its effect, not good or bad.	Above average quantity and quality of vegetation and landscaping. Interesting.	Wow. Creates interest, natural, vegetation, manicured, seasonal color, established trees and vegetation, entrance makes a strong positive statement.	5- Much to work with in this area.
Topography	Difficult to traverse, park a car, or too steep to walk.		Flat, neutral. Doesn't create problems, but little visual interest.		Gentle roll, diversity. Easy to traverse but interesting.	5- Nice area. Good hills, trees.
Drive by traffic	None.	Minimal.	Modest, slightly below average.	Moderate or average for the market area.	Above average.	1.
Water features or other views	None.		Some, modest features for about 50 percent of the property. Merely a water retention pond.		Good water views or other features that will enhance views from every prospective residence on the site.	5- Good possibilities.

**Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities**

Evaluation of Attributes of Church Road and Oak Grove Road

Attribute	1	2	3	4	5	Score
Homes and commercial buildings in surrounding neighborhood	Poor quality. Need upkeep, abandoned, buildings, streets and sidewalks in disrepair.		Average.	Slightly better quality.	Top quality. Well kept, landscaped, strong value. Will help attract customers.	5- Seems rural, but there is a large commercial center within it.
Retail, restaurants and services	More than 12 minute drive.	Between 9 and 12 minutes	Within 5 and 8 minute drive.	Between 1 and 5 minutes.	1-minute drive and walking distance.	3-12 within 3 miles. One within 6 minutes.
Emergency medical	More than 12 minute drive.	Between 9 and 12 minutes.	Within 5 and 8 minute drive.	Between 1 and 5 minutes.	1-minute drive and walking distance.	1-Prince George's Hospital Center. 13.50 miles, 25 minutes.
Major Medical	More than 20 minute drive.	Between 16 and 20 minutes.	Within 11 and 15 minute drive.	Between 6 and 10 minutes.	5-minute drive.	1-Prince George's Hospital Center. 13.50 miles, 25 minutes.
Adult Education University/Community College	More than 20 minute drive.	Between 16 and 20 minutes.	Within 11 and 15 minute drive.	Between 6 and 10 minutes.	1 to 5 minute drive.	4-Prince George's Community College. 4.47 miles, 10 minutes.
Interstate/public transit access	More than 15 minute drive.	Between 11 and 15 minutes.	Within 6 and 10 minute drive.	Between 4 and 6 minutes.	1 to 3 minute drive.	2- I-95 N. 5.59 miles, 13 minutes. Railroad. Within 3 miles.
Recreation within 10 minutes: participatory sports, spectator sports, movies, outdoor recreation fishing, swimming, hiking, boating, bicycling	None.	One to two recreational forms.	Three to four.	Four to five.	Full complement of recreational forms: Outdoor participatory, outdoor spectator, indoor participatory, indoor spectator.	3- Six Flags, Martial Arts, State Park, Swimming, Horse Farm. Within 3 miles.
Cultural opportunities within 10 minutes: theater, music, dance, visual arts, literary arts	None.	One to two facilities offer quality programming.	Three to four facilities offer quality programming.	Four to five facilities offer quality programming.	More than five facilities offer quality programming.	1
Airport	More than 2 ½ hours.	1 ½ to 2 ½ hours.	Within 1 to 1 ½ hours.	Within 30 to 59 minutes.	Within 30 minutes.	4-Ronald Reagan. 20.54 miles, 39 minutes.

Part 7. Evaluation of Prince George's County Potential for Active Adult Communities

Annual Demand for Active Adult Communities in a 3-Mile Radius from Church Road and Oak Grove Road, 2009

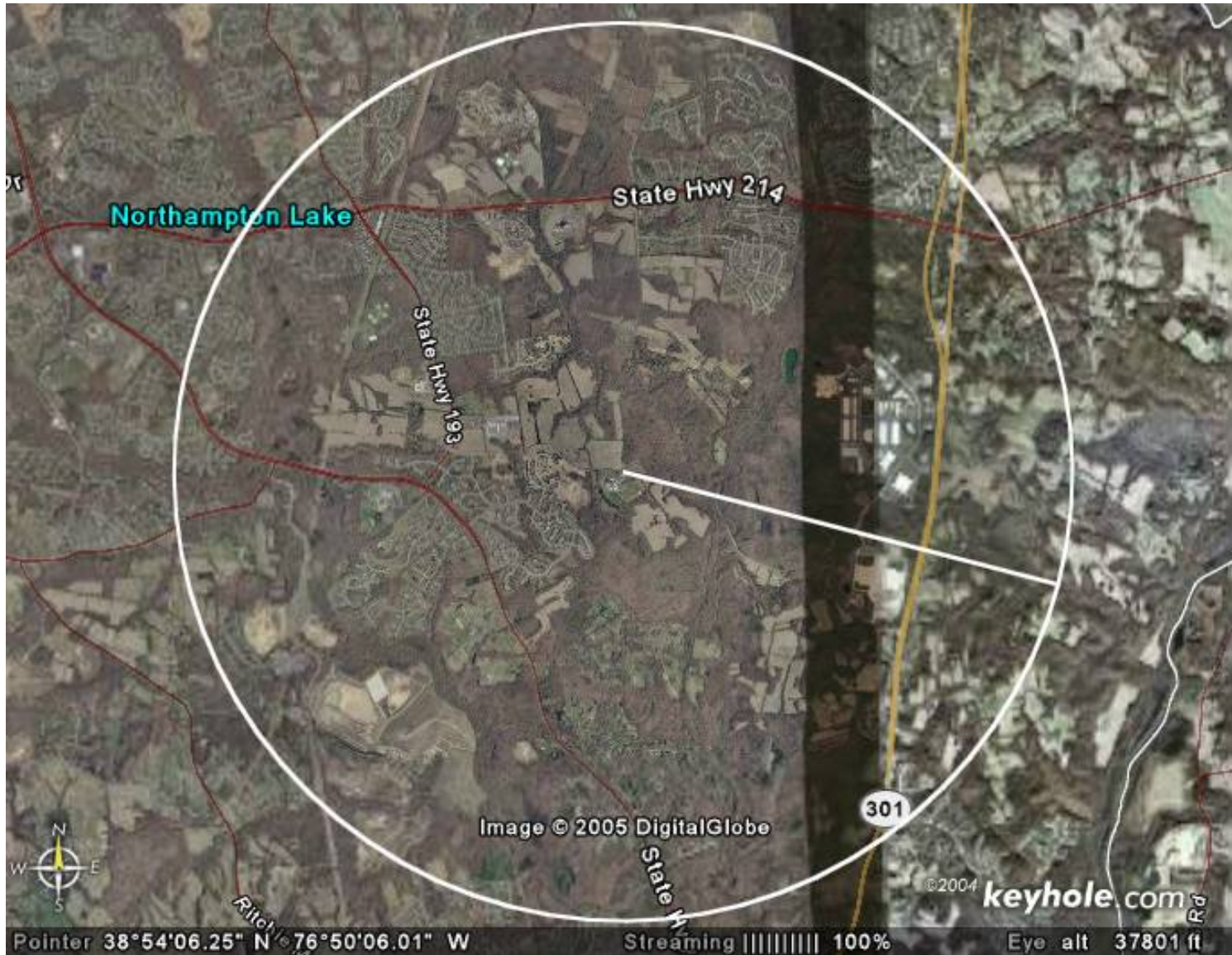
This table reveals that in 2009 among the age- and home-value qualified households (home values of \$80,000 or more), there are an estimated 189 households within the PMA likely to move and choose an age-qualified community. There are 19 households with a home valued between \$100,000 and \$199,999; and 185 households with homes valued at \$200,000 or more likely to move to an age-qualified community within the defined market each year.

Summary of Demand in Households by Home Value		
Total	\$100,000 to \$200,000	\$200,000+
189	19	185

Demand for Active Adult Communities in a 3-Mile Radius from Church Road and Oak Grove Road, 2009	TOTAL	\$80,000	\$100,000	\$150,000	\$200,000	\$300,000	\$400,000	\$500,000
		to \$99,999	to \$149,999	to \$199,999	to \$299,999	to \$399,999	to \$499,999	+
Number of Households in County	9,798							
Percent of Age-Qualified Households	31%							
Number of Age-Qualified Households in PMA	3,021.32							
% of Households with a Qualified Existing Home Value	99.2%	0.1%	0.1%	1.6%	8.6%	39.8%	26.3%	22.8%
Number of Age- and Home-Value-Qualified Households	8,927	8	5	144	769	3,580	2,370	2,051
Annual Turnover Rate	9.6%	9.6%	9.6%	9.6%	9.6%	9.6%	9.6%	9.6%
Annual Turnover (Units)	857	1	0	14	74	344	228	197
Percentage Likely to Remain in PMA	90%	90%	90%	90%	90%	90%	90%	90%
Number Likely to Remain in PMA	771	1	0	12	66	309	205	177
Percent Interested in an Age-Qualified Community	24.5%	24.5%	24.5%	24.5%	24.5%	24.5%	24.5%	24.5%
Demand for Age-Qualified Community in Units	189	0	0	3	16	76	50	43

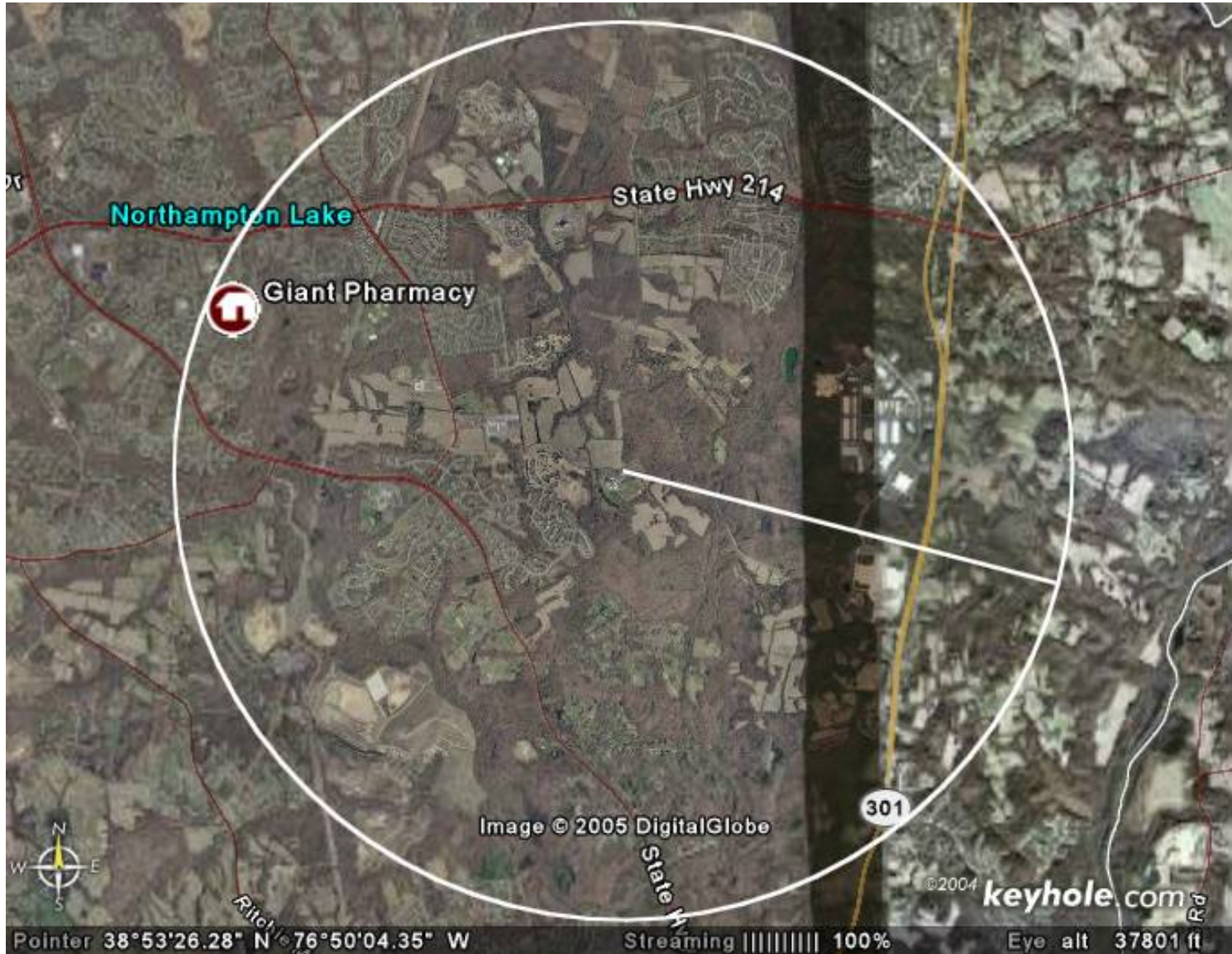
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Church Road and Oak Grove Road Hospital and Fire (0)



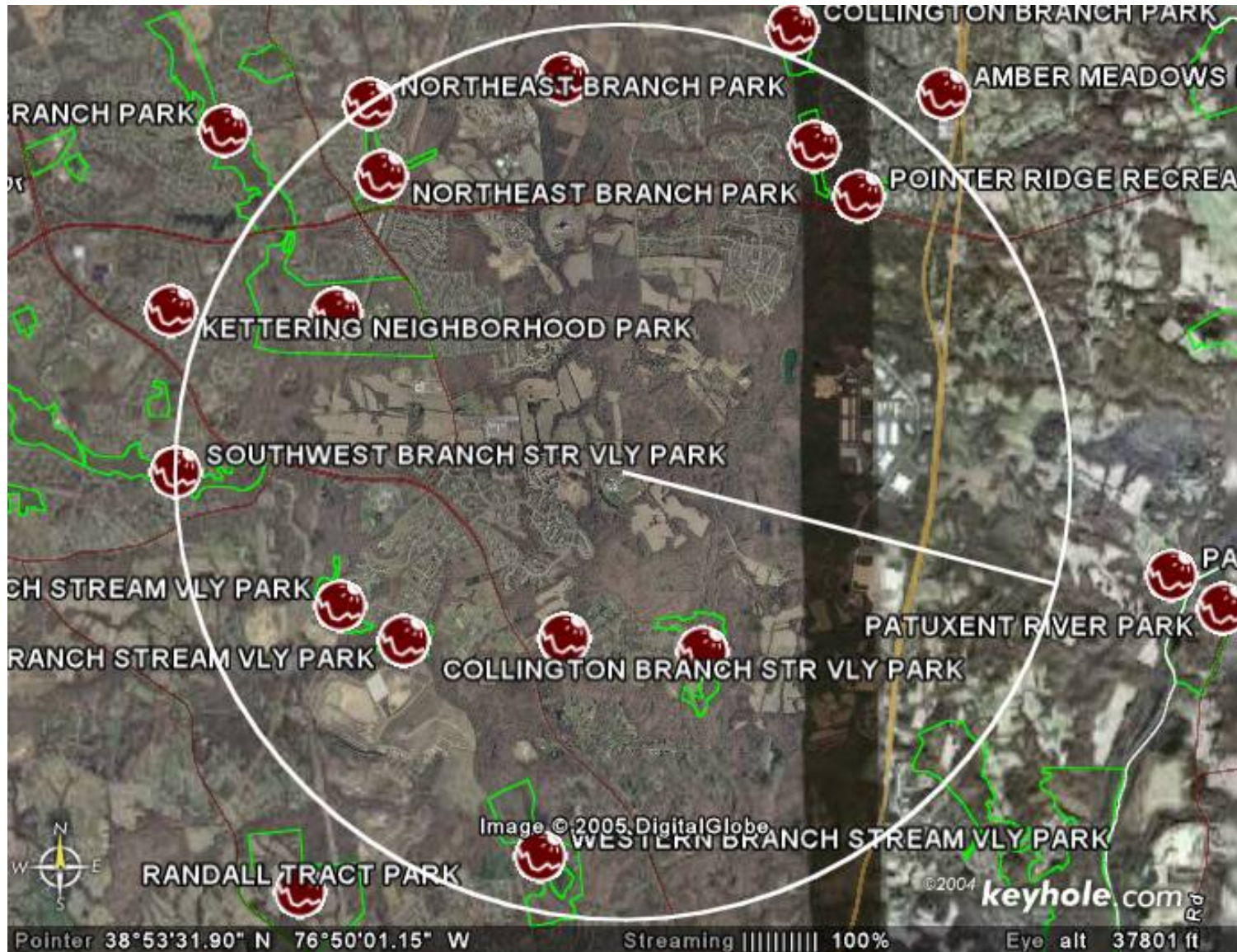
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Church Road and Oak Grove Road Grocery Stores (1)



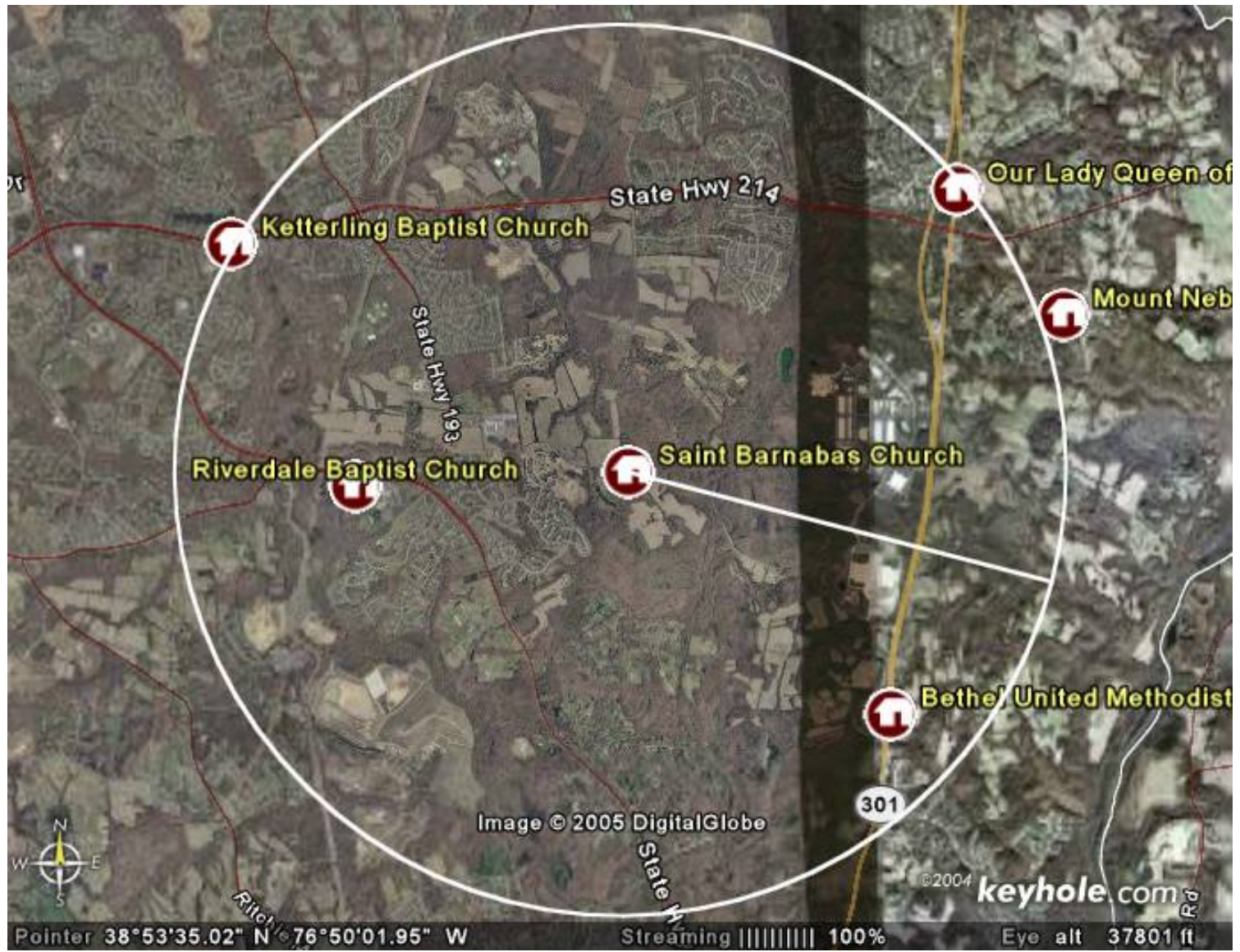
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Church Road and Oak Grove Road Parks (12)



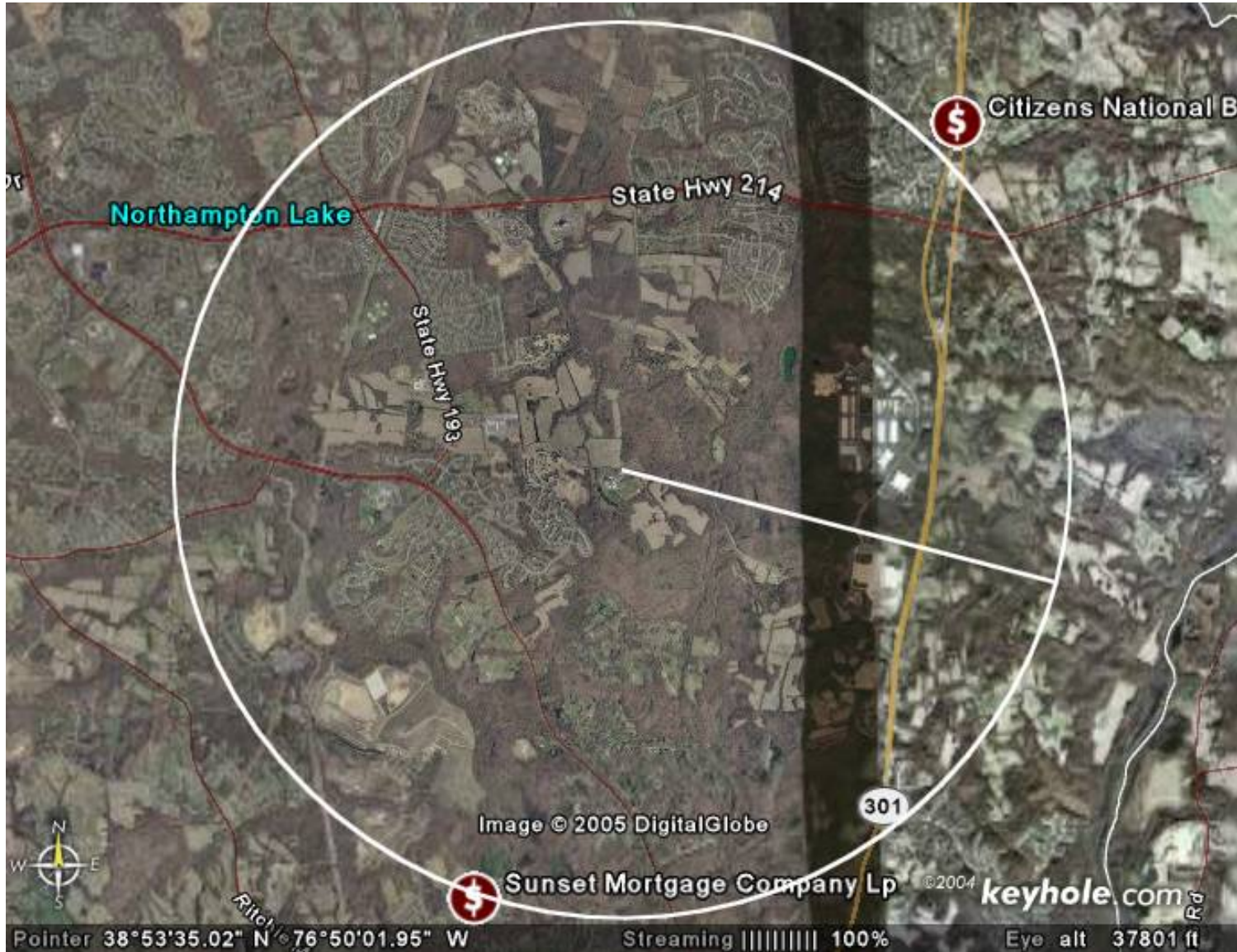
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Church Road and Oak Grove Road Churches (4)



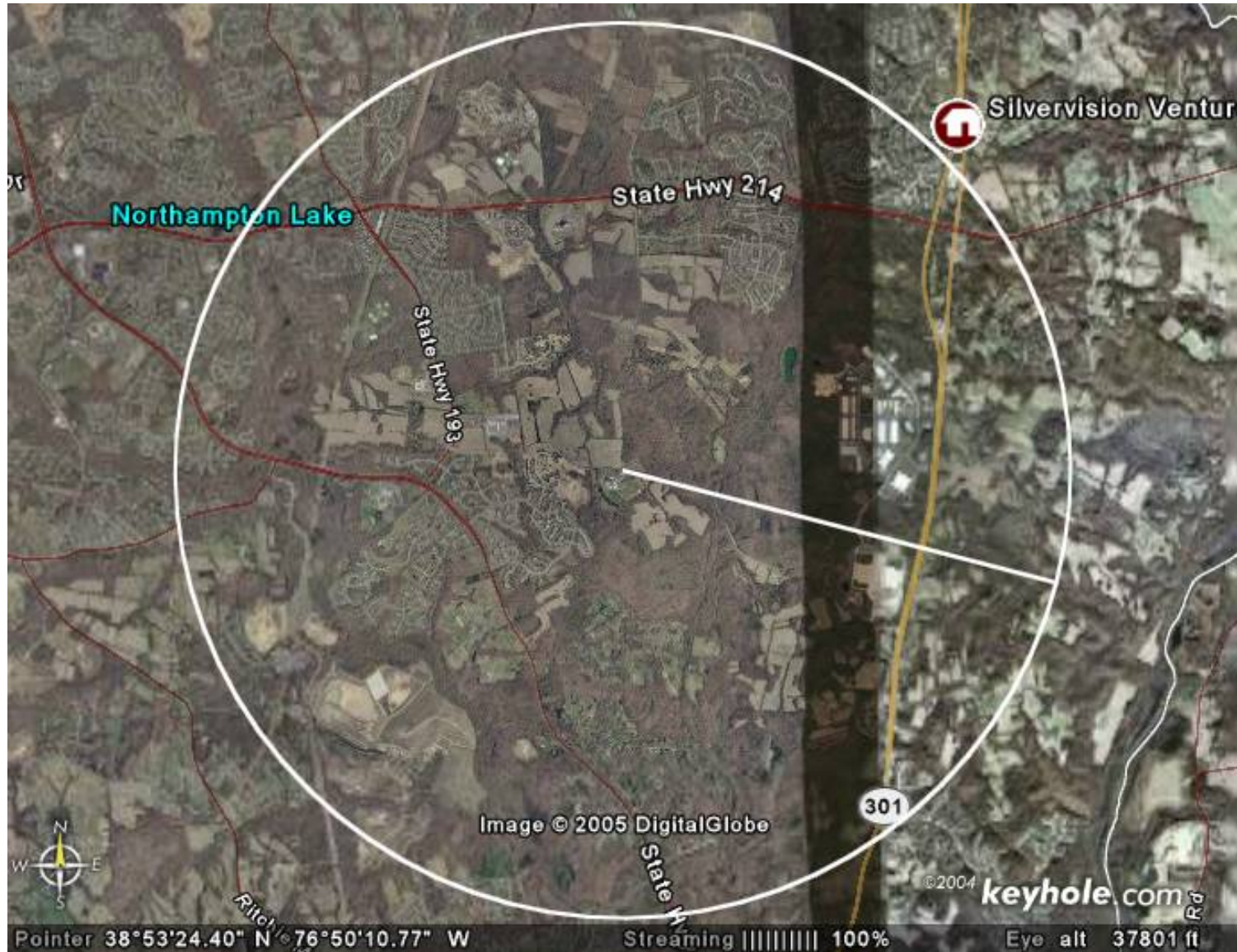
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Church Road and Oak Grove Road Banks (0)



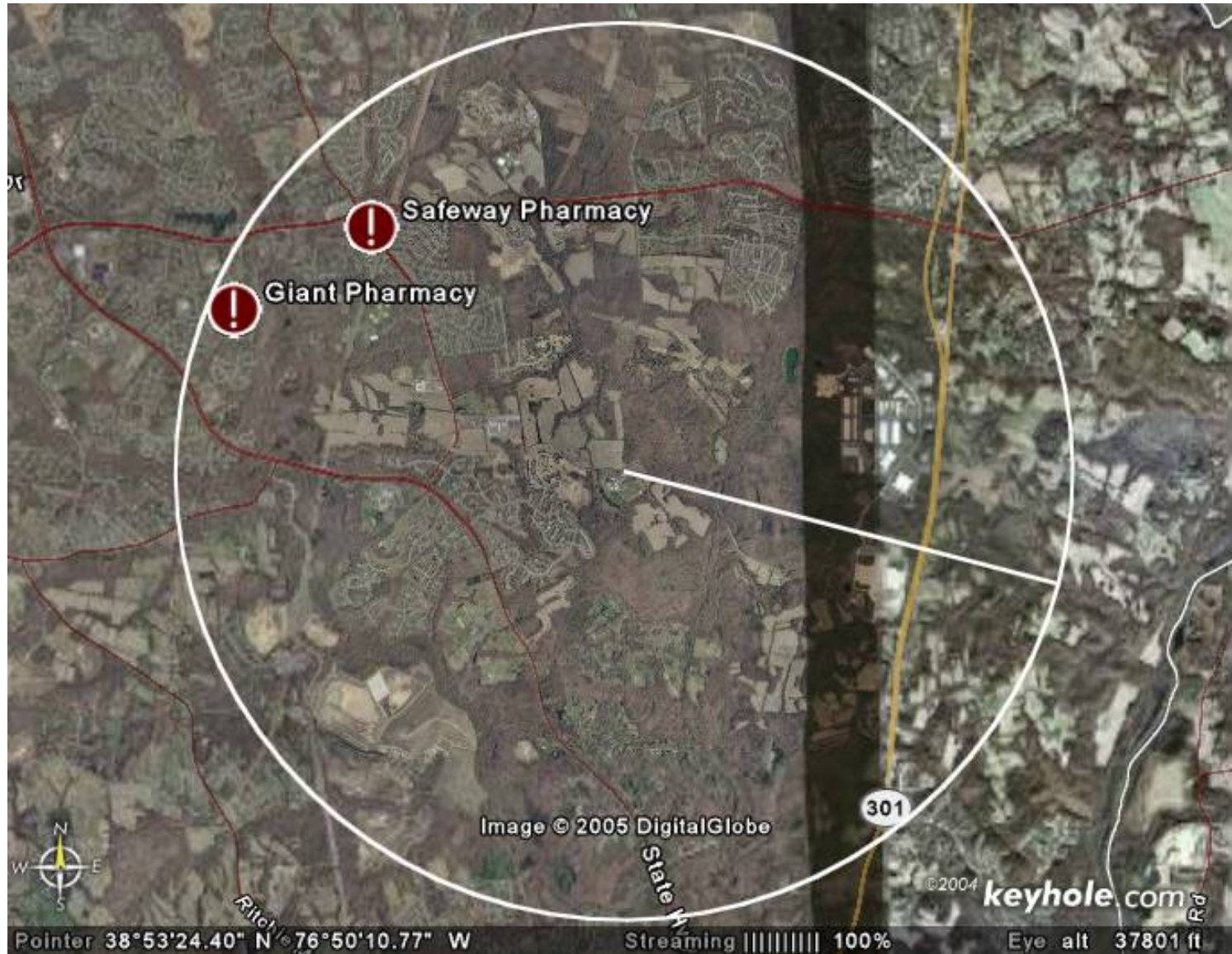
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Church Road and Oak Grove Road Major Retail (0)



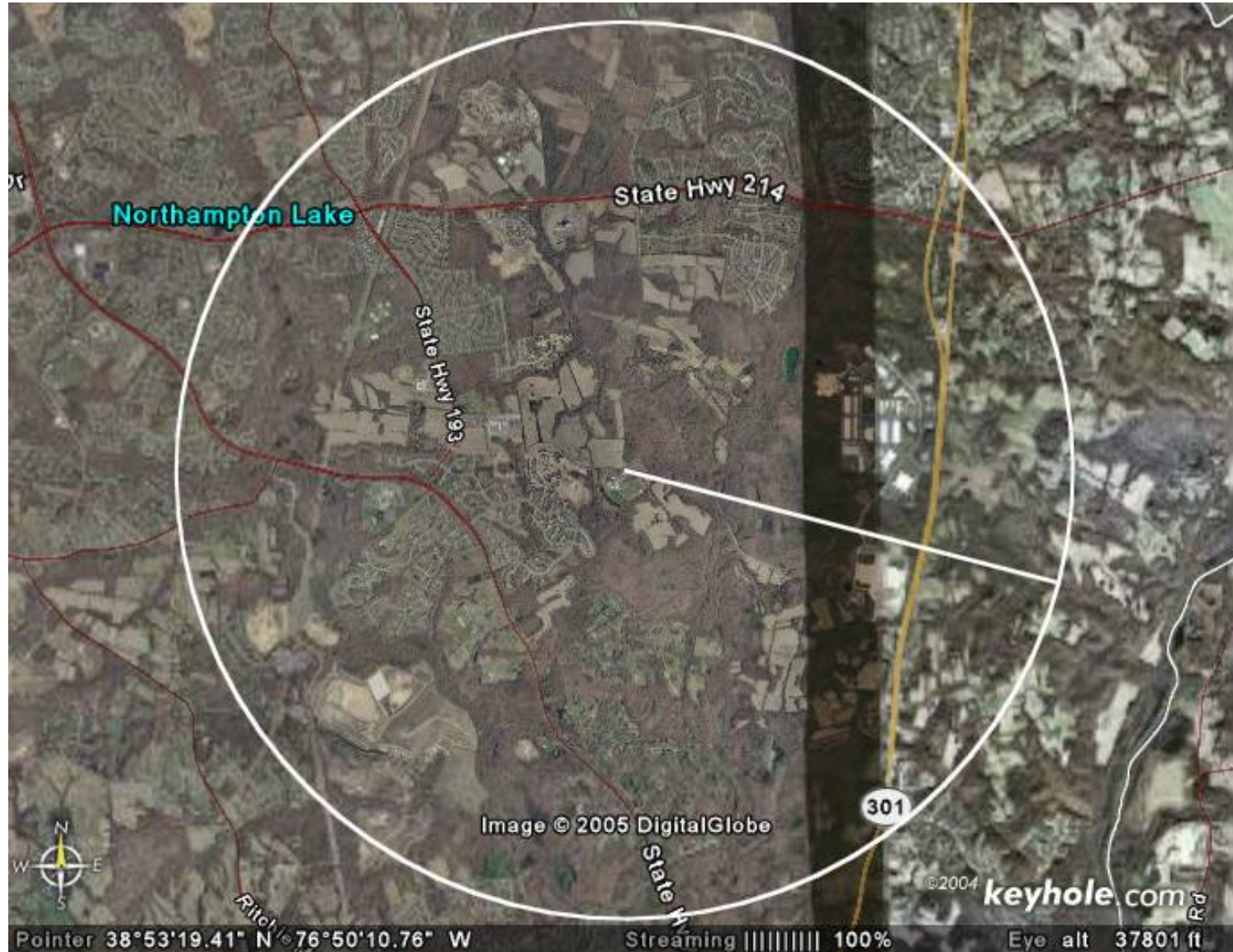
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Church Road and Oak Grove Road Pharmacy (2)



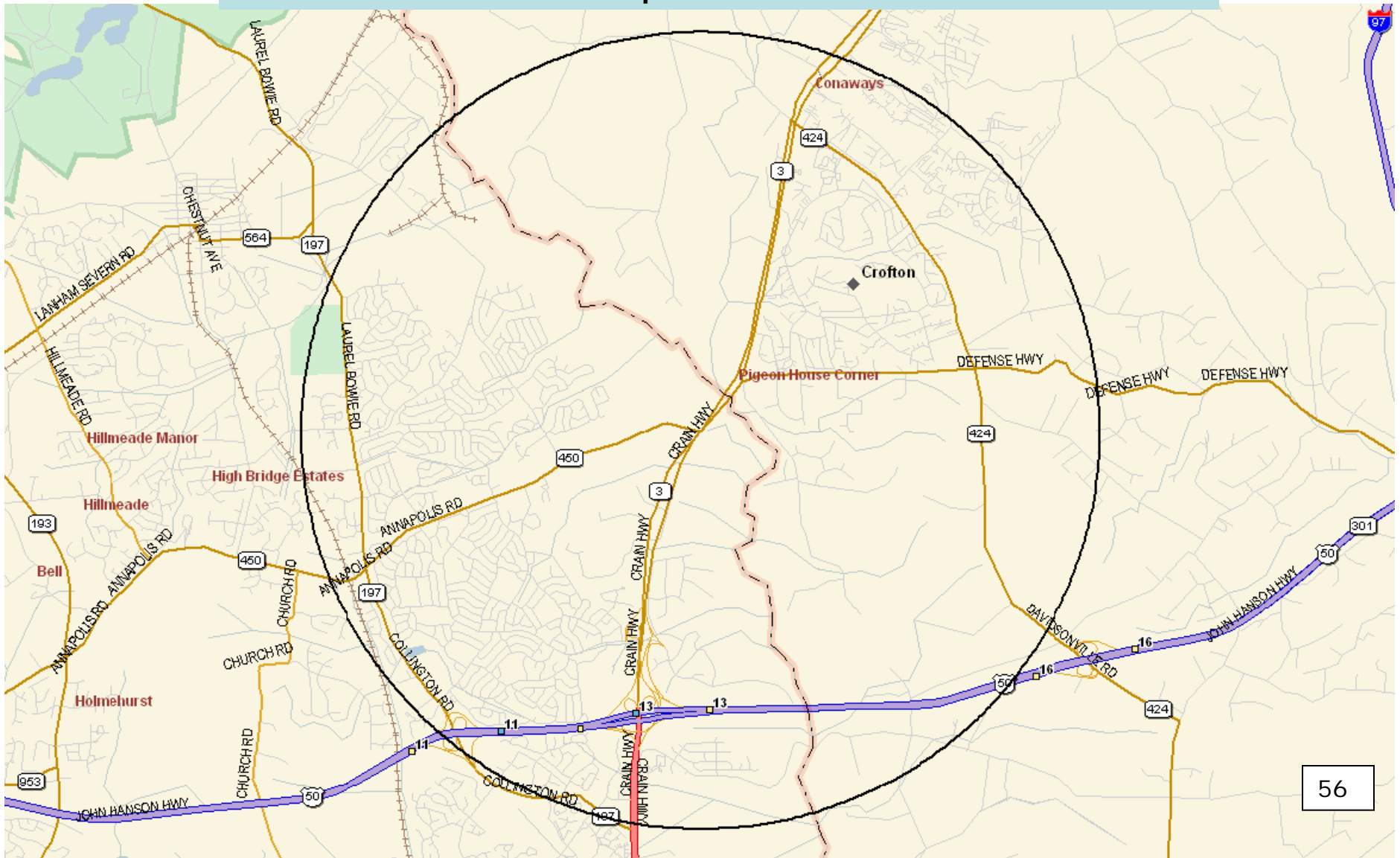
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Church Road and Oak Grove Road Major Malls (0)



Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

**Crain Highway and Annapolis Road
Key Market Area (3-Mile Radius) Encompassed in Location Evaluation
Zip Code 20715**



Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Site Features Crain Highway and Annapolis Road						
Attribute	1	2	3	4	5	Assessment of This Site
Site appearance	No features, minimal or unsightly signage, no vegetation.	Sparse vegetation, lackluster landscaping, mediocre signage.	Average size, quantity and quality of vegetation. Good landscaping. Entrance is neutral in its effect, not good or bad.	Above average quantity and quality of vegetation and landscaping. Interesting.	Wow. Creates interest, natural, vegetation, manicured, seasonal color, established trees and vegetation, entrance makes a strong positive statement.	3- The area in this small corner of the county is pretty. There is the public works sewage treatment plant and recycling area on the west edge of this area.
Topography	Difficult to traverse, park a car, or too steep to walk.		Flat, neutral. Doesn't create problems, but little visual interest.		Gentle roll, diversity. Easy to traverse but interesting.	5- Along the Patuxent River. Great trees, nice rolling landscape.
Drive-by traffic	None.	Minimal.	Modest, slightly below average.	Moderate or average for the market area.	Above average.	5- Annapolis Road has moderate traffic volume: 42,300. Crain Highway has high traffic volume: 238,275 at northern end and 123,300 at southern end.
Water features or other views	None.		Some, modest features for about 50 percent of the property. Merely a water retention pond.		Good water views or other features that will enhance views from every prospective residence on the site.	5- Good possibilities.

**Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities**

Evaluation of Attributes of Crain Highway and Annapolis Road

Attribute (Weight)	1	2	3	4	5	Score
Homes and commercial buildings in surrounding neighborhood	Poor quality. Need upkeep, abandoned, buildings, streets and sidewalks in disrepair.		Average.	Slightly better quality.	Top quality. Well kept, landscaped, strong value. Will help attract customers.	3- Ranges from 2 to 5. Some of the older homes and businesses run down. New developments in area are good quality.
Retail, restaurants and services	More than 12-minute drive.	Between 9 and 12 minutes.	Within 5 and 8 minute drive.	Between 1 and 5 minutes.	1 minute drive and walking distance.	5-40 within 3 miles. One within 1 minute.
Emergency medical	More than 12-minute drive	Between 9 and 12 minutes.	Within 5 and 8 minute drive.	Between 1 and 5 minutes.	1 minute drive and walking distance.	3- Bowie Health Center. 8.15 miles, 18 minutes.
Major Medical	More than 20-minute drive.	Between 16 and 20 minutes.	Within 11 and 15 minute drive.	Between 6 and 10 minutes.	5 minute drive.	3- Bowie Health Center. 8.15 miles, 18 minutes.
Adult Education University/Community College	More than 20-minute drive.	Between 16 and 20 minutes.	Within 11 and 15 minute drive.	Between 6 and 10 minutes.	1 to 5 minute drive.	4- Bowie St. University. 4.04 miles, 9 minutes.
Interstate/public transit access	More than 15-minute drive.	Between 11 and 15 minutes.	Within 6 and 10 minute drive.	Between 4 and 6 minutes.	1 to 3 minute drive.	3- I-95 N. 14.92 miles, 24 minutes. Taxi/Limo, Service, Railroad. Within 3 miles.
Recreation within 10 minutes: participatory sports, spectator sports, movies, outdoor recreation fishing, swimming, hiking, boating, bicycling	None.	One to two recreational forms.	Three to four.	Four to five.	Full complement of recreational forms: Outdoor participatory, outdoor spectator, indoor participatory, indoor spectator.	5-Movie Theatre, swimming. Within 3 miles.
Cultural opportunities within 10 minutes: theater, music, dance, visual arts, literary arts	None.	One to two facilities offer quality programming.	Three to four facilities offer quality programming.	Four to five facilities offer quality programming.	More than five facilities offer quality programming.	5- Crofton Art and Frame, multiple Country Clubs, Community Centers. Within 3 miles.
Airport	More than 2 ½ hours.	1 ½ to 2 ½ hours.	Within 1 to 1 ½ hours.	Within 30 to 59 minutes.	Within 30 minutes.	4-Baltimore Washington International. 18.61 miles, 37 minutes.

Part 7. Evaluation of Prince George's County Potential for Active Adult Communities

Annual Demand for Active Adult Communities in a 3-Mile Radius from Crain Highway and Annapolis Road, 2009

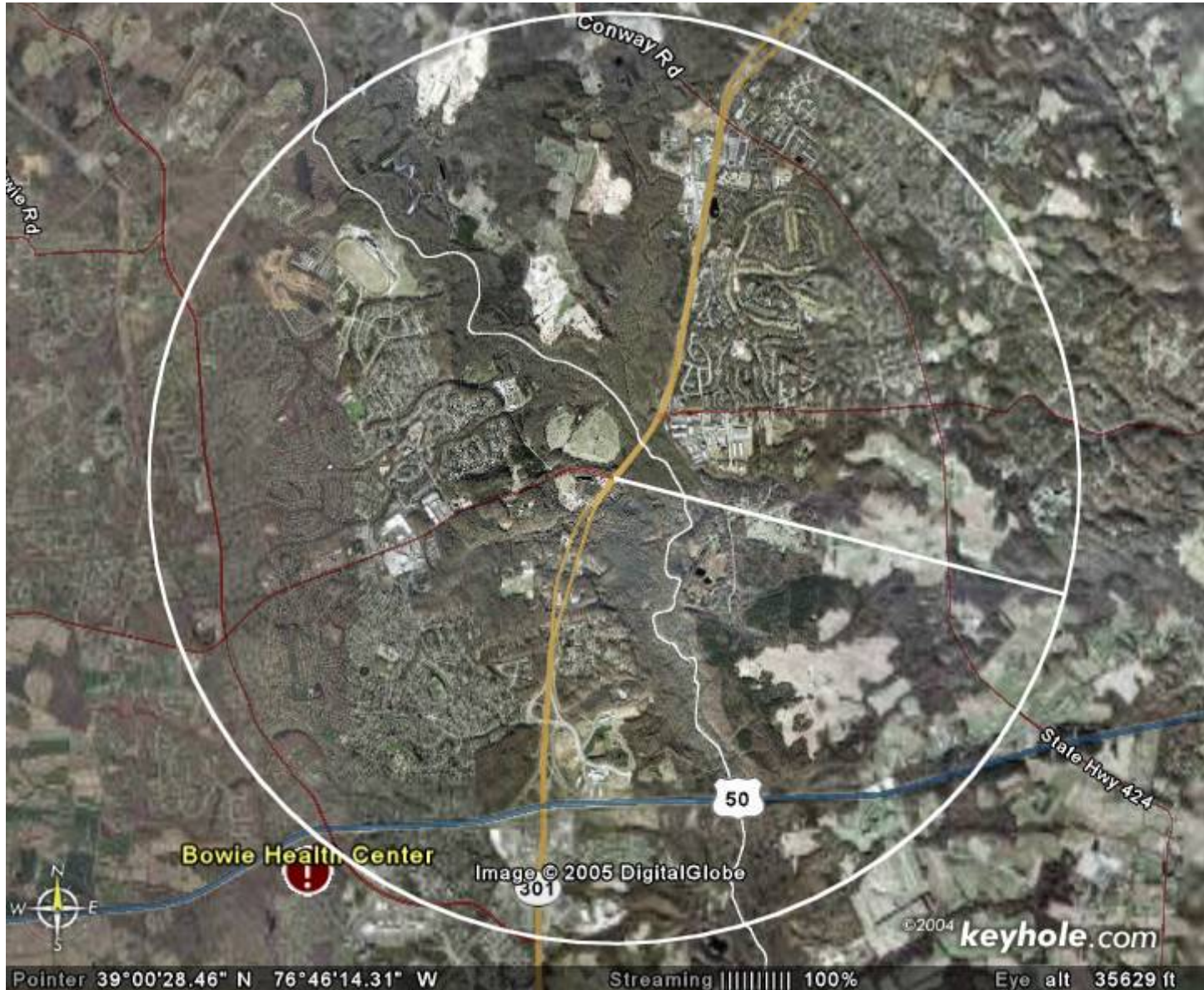
This table reveals that in 2009 among the age- and home-value-qualified households (home values of \$80,000 or more), there are an estimated 300 households within the PMA likely to move and choose an age-qualified community. There are 9 households with a home valued between \$100,000 and \$199,999; and 291 households with homes valued at \$200,000 or more likely to move to an age-qualified community within the defined market each year.

Summary of Demand in Households by Home Value		
Total	\$100,000 to \$200,000	\$200,000+
300	9	291

Demand for Active Adult Communities in a 3-Mile Radius from Crain Highway and Annapolis Road 2009	TOTAL	\$80,000 to \$99,999	\$100,000 to \$149,999	\$150,000 to \$199,999	\$200,000 to \$299,999	\$300,000 to \$399,999	\$400,000 to \$499,999	\$500,000 +
Number of Households in County	19,334							
Percent of Age-Qualified Households	31%							
Number of Age-Qualified Households in PMA	5,961.85							
% of Households with a Qualified Existing Home Value	99.1%	0.0%	0.1%	0.8%	9.9%	48.7%	21.8%	17.9%
Number of Age- and Home-Value-Qualified Households	16,388	7	8	130	1,639	8,046	3,597	2,961
Annual Turnover Rate	9.6%	9.6%	9.6%	9.6%	9.6%	9.6%	9.6%	9.6%
Annual Turnover (Units)	1,573	1	1	12	157	772	345	284
Percentage Likely to Remain in PMA	90%	90%	90%	90%	90%	90%	90%	90%
Number Likely to Remain in PMA	1,416	1	1	11	142	695	311	256
Percent Interested in an Age- and Home-Value-Qualified Community	24.5%	24.5%	24.5%	24.5%	24.5%	24.5%	24.5%	24.5%
Demand for Age- and Home-Value-Qualified Community in Units	347	0	0	3	35	170	76	63

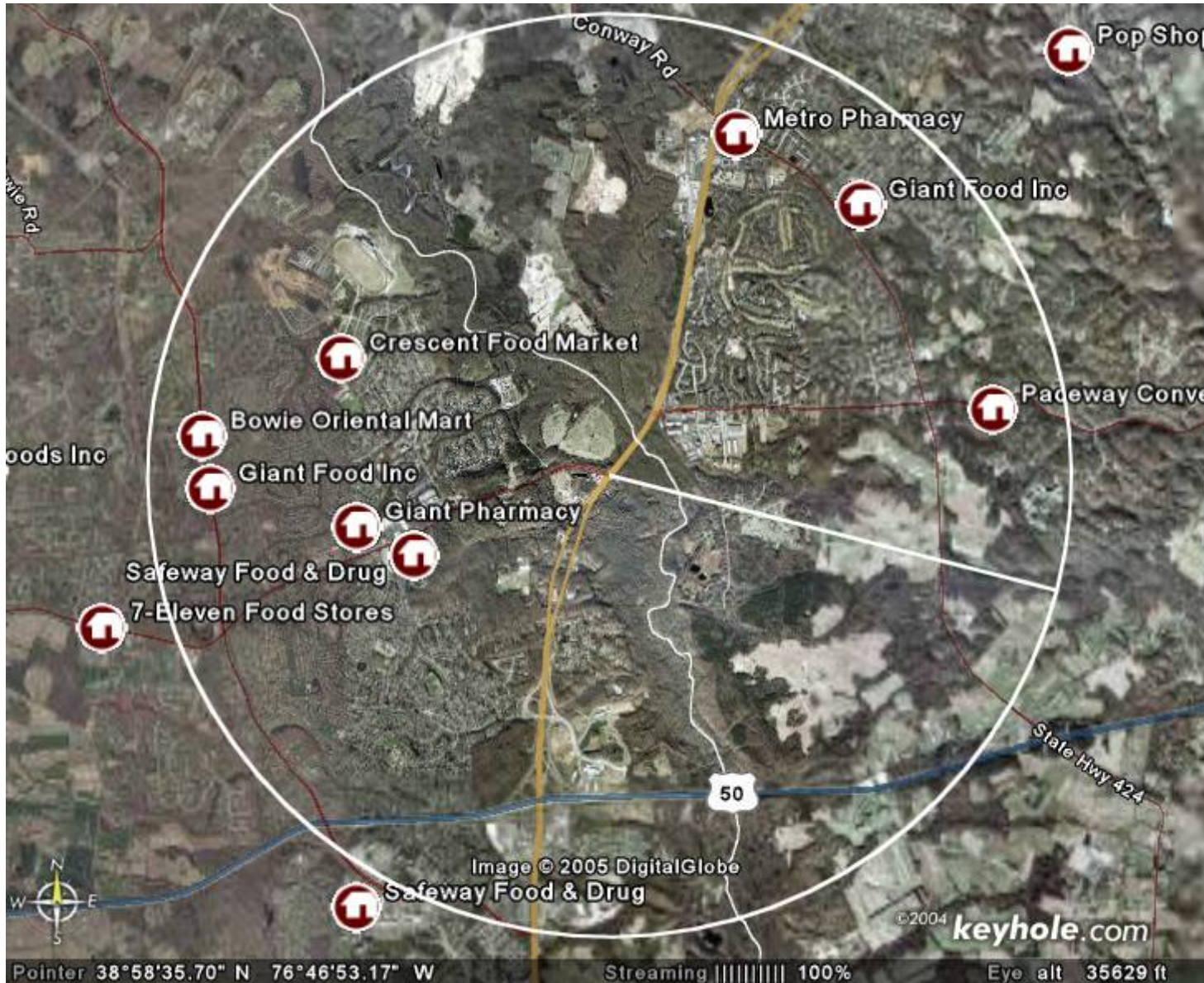
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Crain Highway and Annapolis Road Hospital and Fire (0)



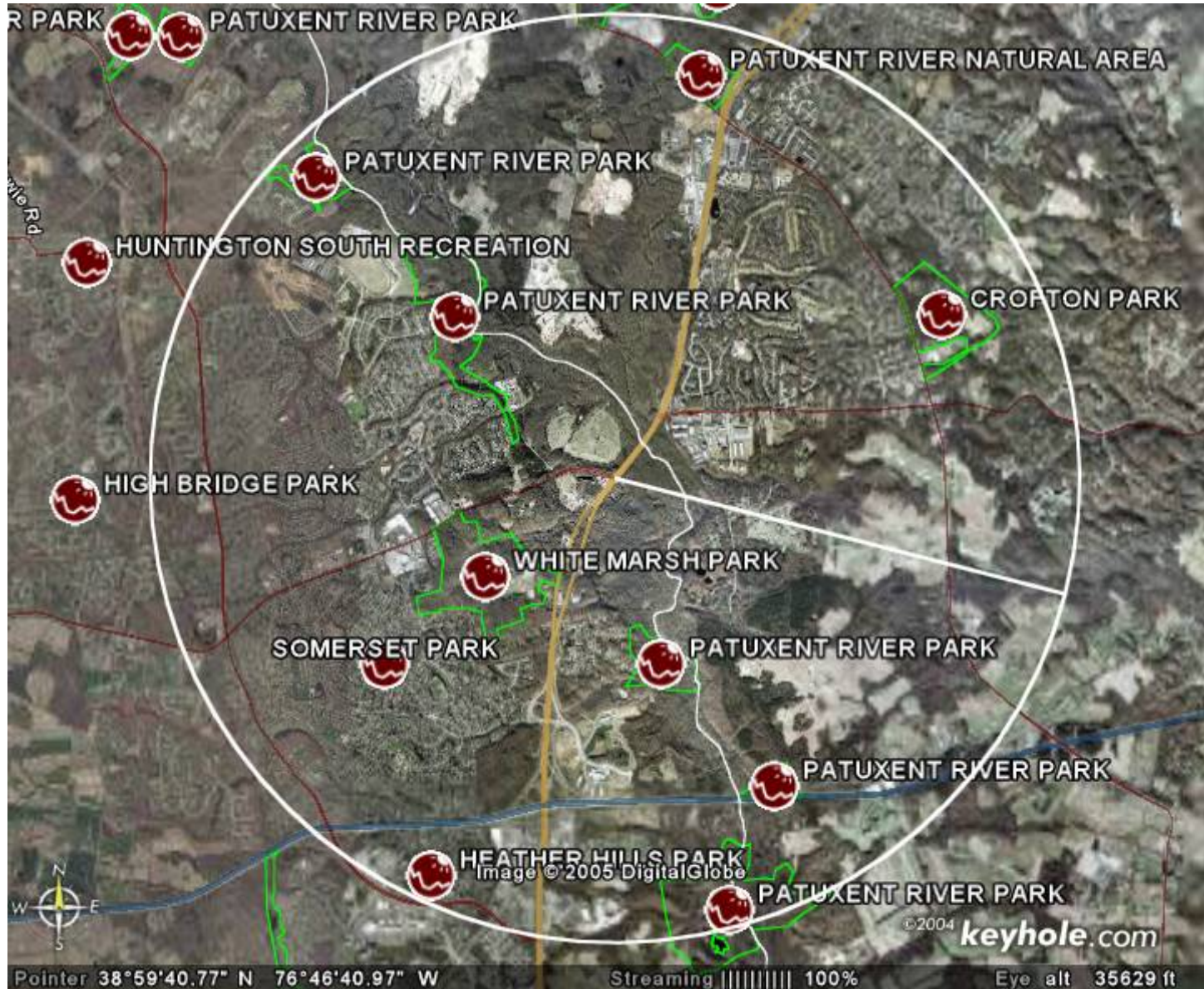
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Crain Highway and Annapolis Road Grocery Stores (8)



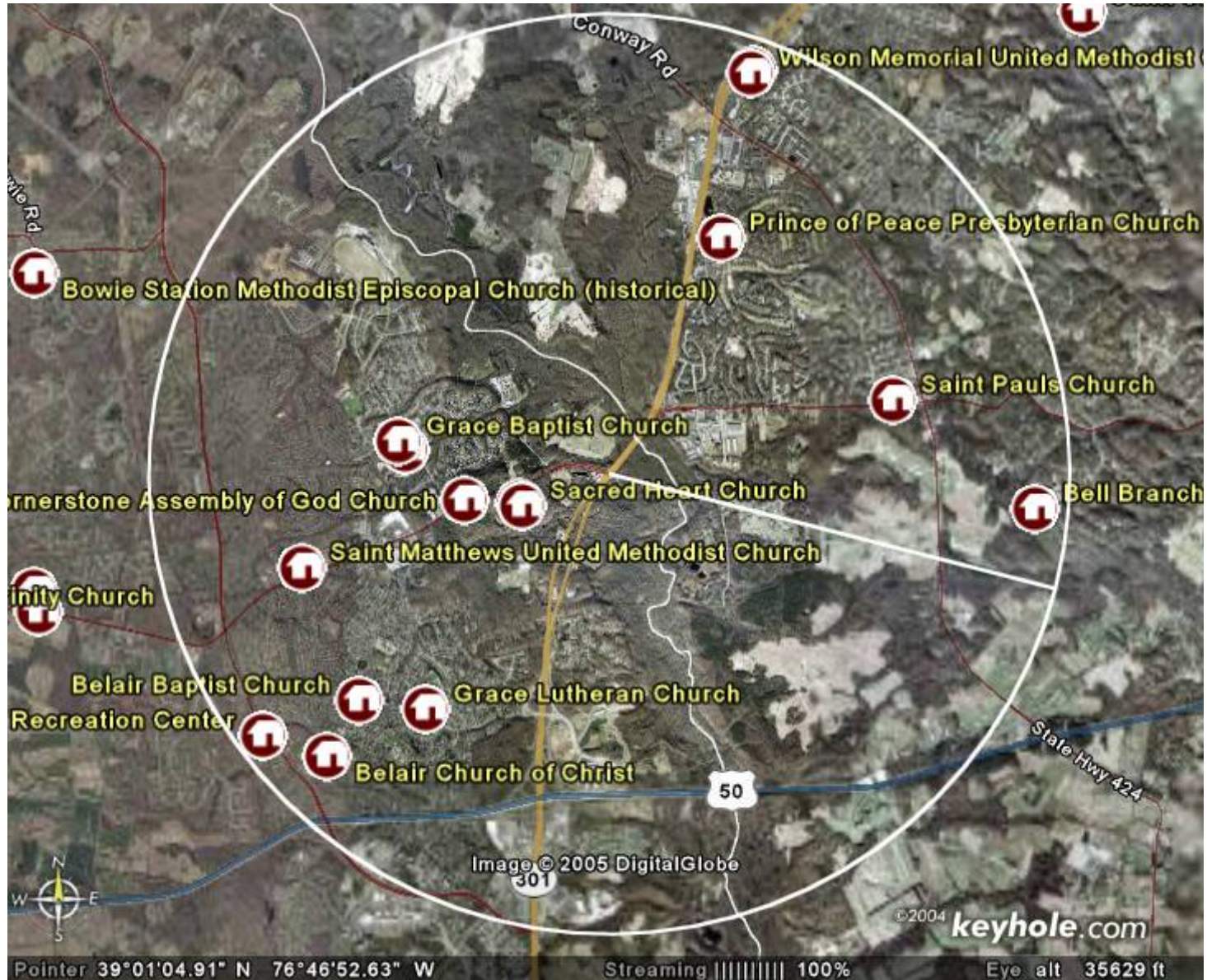
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Crain Highway and Annapolis Road Parks (10)



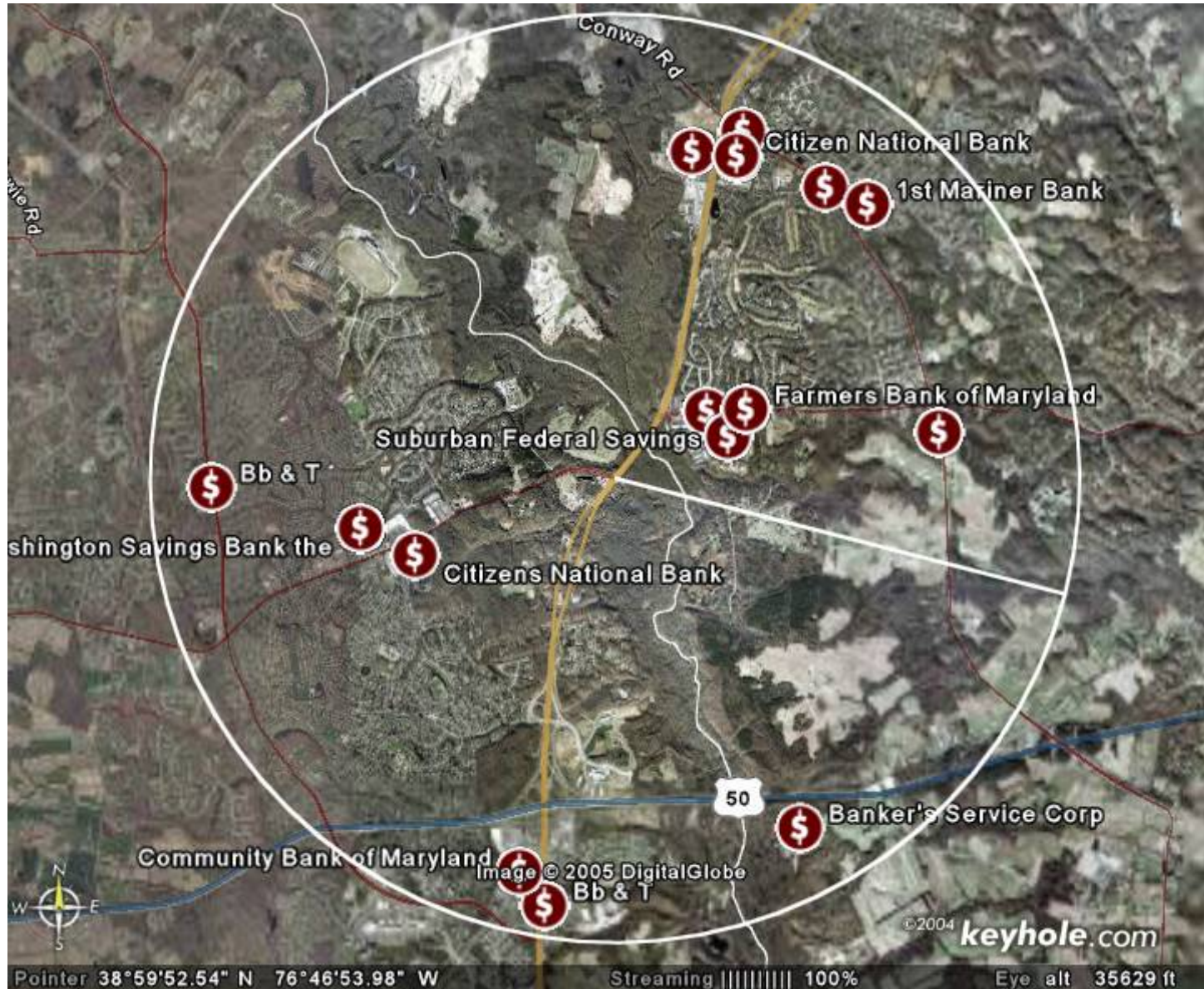
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Crain Highway and Annapolis Road Churches (14)



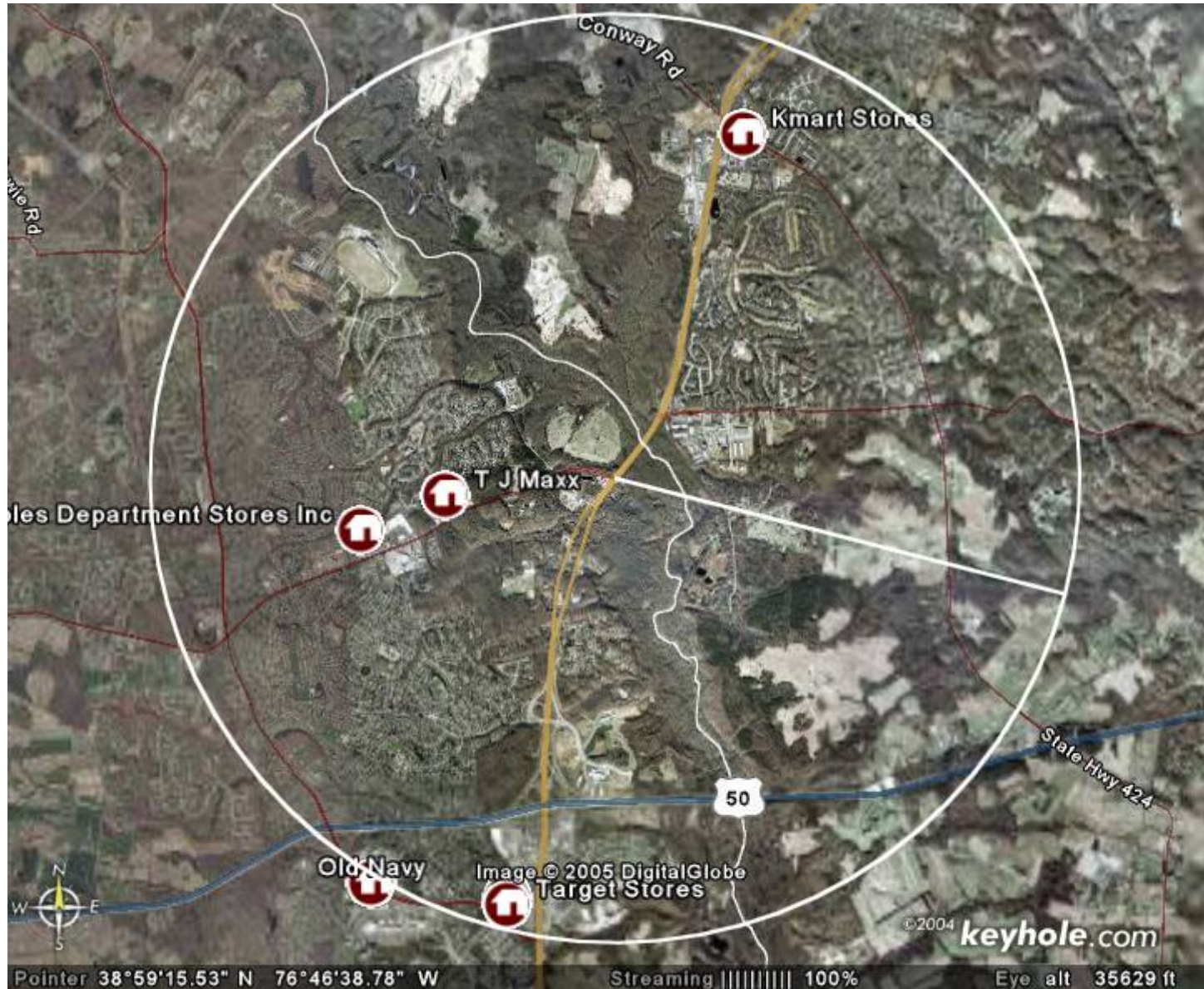
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Crain Highway and Annapolis Road Banks (16)



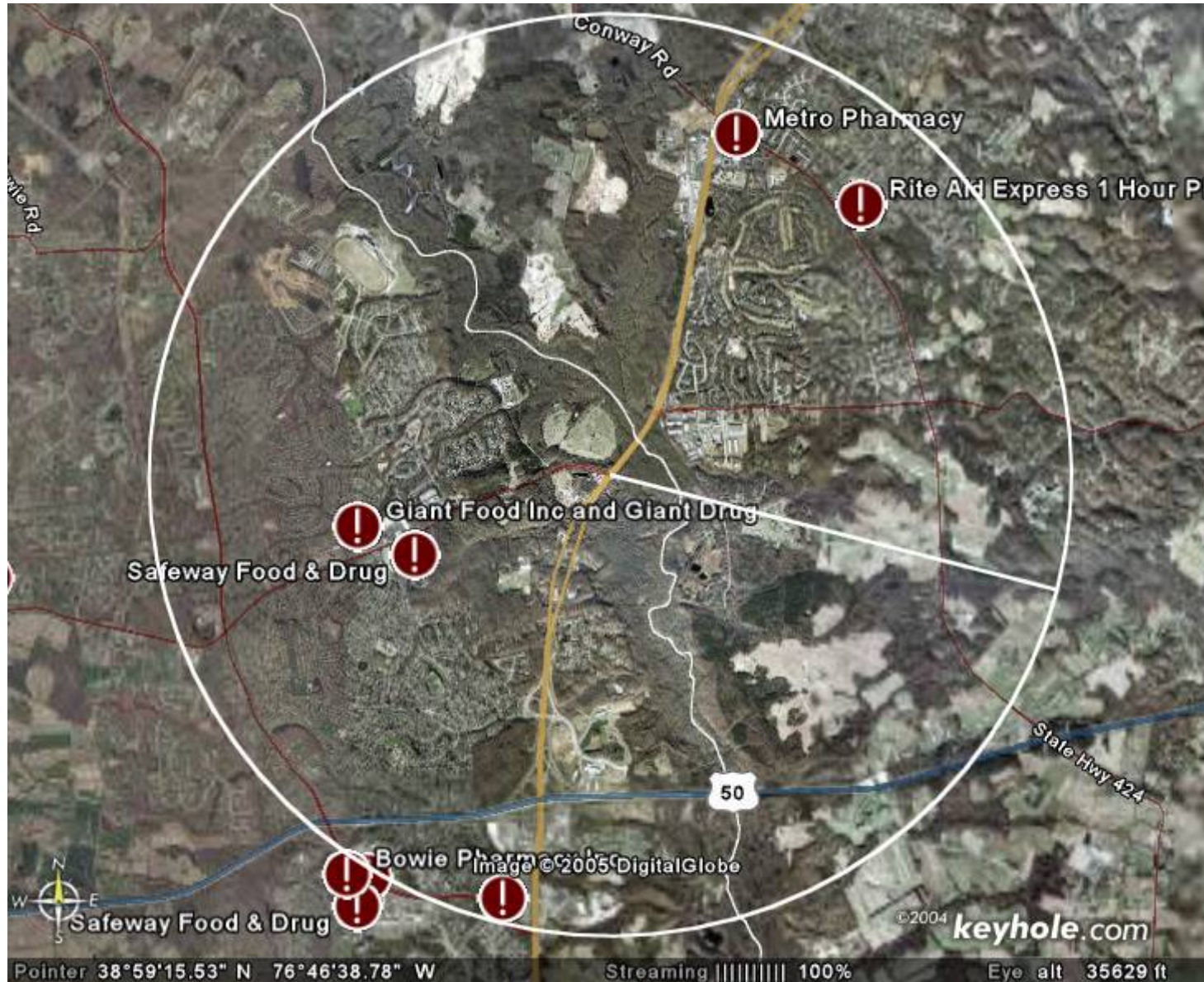
Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities

Crain Highway and Annapolis Road Major Retail (5)



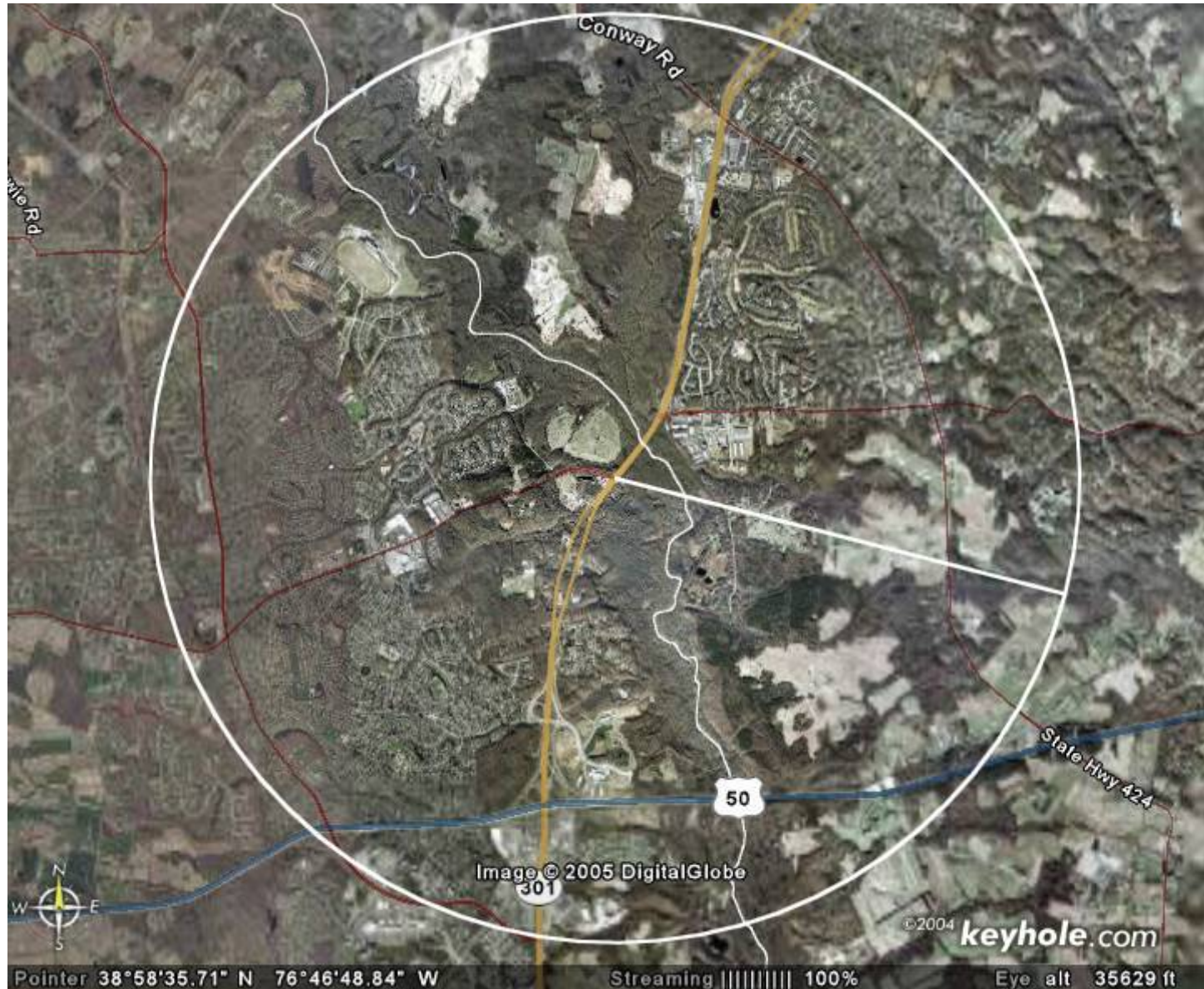
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Crain Highway and Annapolis Road Pharmacy (5)



Part 7. Evaluation of Prince George's County
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Crain Highway and Annapolis Road Major Malls (0)



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Site Features I-95 and Ritchie Marlboro Road						
Attribute	1	2	3	4	5	Assessment of This Site
Site appearance	No features, minimal or unsightly signage, no vegetation.	Sparse vegetation, lackluster landscaping, mediocre signage.	Average size, quantity and quality of vegetation. Good landscaping. Entrance is neutral in its effect, not good or bad.	Above average quantity and quality of vegetation and landscaping. Interesting.	Wow. Creates interest, natural, vegetation, manicured, seasonal color, established trees and vegetation, entrance makes a strong positive statement.	3- Overall the area has an industrial, commercial feel to it. The area right around the I-95 and Ritchie Road intersection has possibilities.
Topography	Difficult to traverse, park a car, or too steep to walk.		Flat, neutral. Doesn't create problems, but little visual interest.		Gentle roll, diversity. Easy to traverse but interesting.	4- The area as a whole is a little more developed. Slightly flatter than other areas.
Drive by traffic	None.	Minimal.	Modest, slightly below average.	Moderate or average for the market area.	Above average.	5-Capital Beltway has high traffic volume: Over 600,000+ northern end, and 800,000+ southern end.
Water features or other views	None.		Some, modest features for about 50 percent of the property. Merely a water retention pond.		Good water views or other features that will enhance views from every prospective residence on the site.	3- Limited possibilities.

**Part 7. Evaluation of Prince George's County
Potential for Active Adult Communities**

Evaluation of Attributes of I-95 and Ritchie Marlboro Road

Attribute (Weight)	1	2	3	4	5	Score
Homes and commercial buildings in surrounding neighborhood	Poor quality. Need upkeep, abandoned, buildings, streets and sidewalks in disrepair.		Average.	Slightly better quality.	Top quality. Well kept, landscaped, strong value. Will help attract customers.	3- A commercial area catering more to automotive and construction. Hampton Mall is a C-grade mall.
Retail, restaurants and services	More than 12-minute drive.	Between 9 and 12 minutes.	Within 5 and 8 minute drive.	Between 1 and 5 minutes.	1-minute drive and walking distance.	2-60 within 3 miles. One within 9 minutes.
Emergency medical	More than 12-minute drive.	Between 9 and 12 minutes.	Within 5 and 8 minute drive.	Between 1 and 5 minutes.	1-minute drive and walking distance.	4-US Medical. 3.68 miles, 4 minutes.
Major Medical	More than 20-minute drive.	Between 16 and 20 minutes.	Within 11 and 15 minute drive.	Between 6 and 10 minutes.	5-minute drive.	5-US Medical. 3.68 miles, 4 minutes.
Adult Education University/Community College	More than 20-minute drive.	Between 16 and 20 minutes.	Within 11 and 15 minute drive.	Between 6 and 10 minutes.	1 to 5 minute drive.	3-Prince George's Community College. 8.51 miles, 13 minutes.
Interstate/public transit access	More than 15-minute drive.	Between 11 and 15 minutes.	Within 6 and 10 minute drive.	Between 4 and 6 minutes.	1 to 3 minute drive.	2- I-95 S. 9.24 miles, 12 minutes. Taxi/Limo, Bus within 3 miles.
Recreation within 10 minutes: participatory sports, spectator sports, movies, outdoor recreation fishing, swimming, hiking, boating, bicycling	None.	One to two recreational forms.	Three to four.	Four to five.	Full complement of recreational forms: Outdoor participatory, outdoor spectator, indoor participatory, indoor spectator.	5-Multiple parks, outdoor recreation, swimming, boating. Within 3 miles.
Cultural opportunities within 10 minutes: theater, music, dance, visual arts, literary arts	None.	One to two facilities offer quality programming.	Three to four facilities offer quality programming.	Four to five facilities offer quality programming.	More than five facilities offer quality programming.	5-Multiple facilities for dance, music, visual arts, museums. Within 3 miles.
Airport	More than 2 ½ hours.	1 ½ to 2 ½ hours.	Within 1 to 1 ½ hours.	Within 30 to 59 minutes.	Within 30 minutes.	5-Ronald Reagan. 17.7 miles, 26 minutes.