

Energy Development and
Transmission Committee
Tour of Williston
September 2, 2015





Williston Area Recreation Center



Jonathan's Landing Subdivision
Acres: 19
Zones: R-1
Single Family Homes: 59



University Commons Subdivision

Acres: 60

Zones: C-3, R-3

Multifamily Units: 531

Town Homes Units: 79



Pheasant Crossing Subdivision

Acres: 30

Zones: R-3

Multifamily Units: 144

Single Family Homes: 96



North Gate Subdivision
Acres: 30.6
Zones: R-3
Multifamily Units: 300



Williston Garden Subdivision
Zone: R-3
Multifamily Units: 144



Badlands Town Center



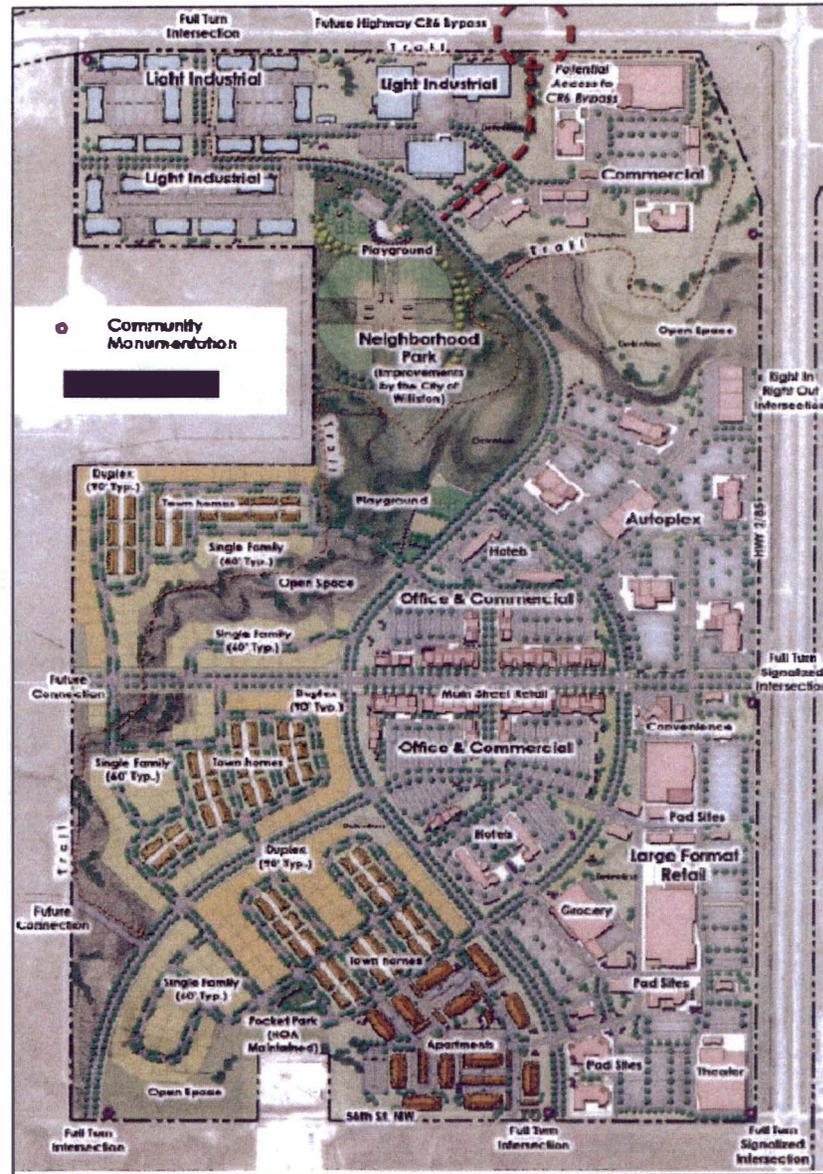
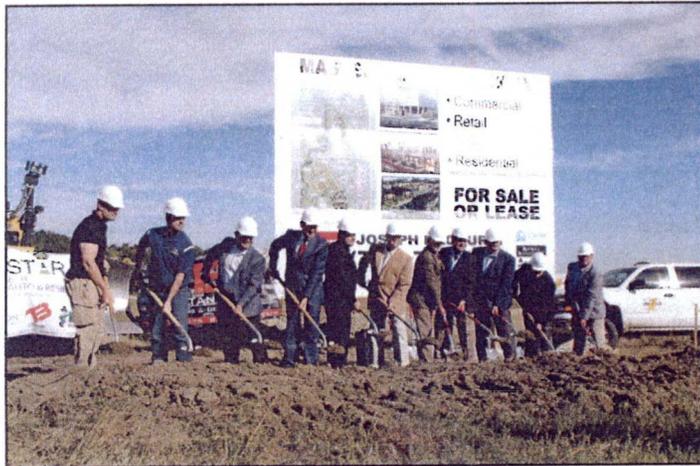
Roseland Subdivision
Acres: 70
Zones: R-3
Multifamily Units: 648



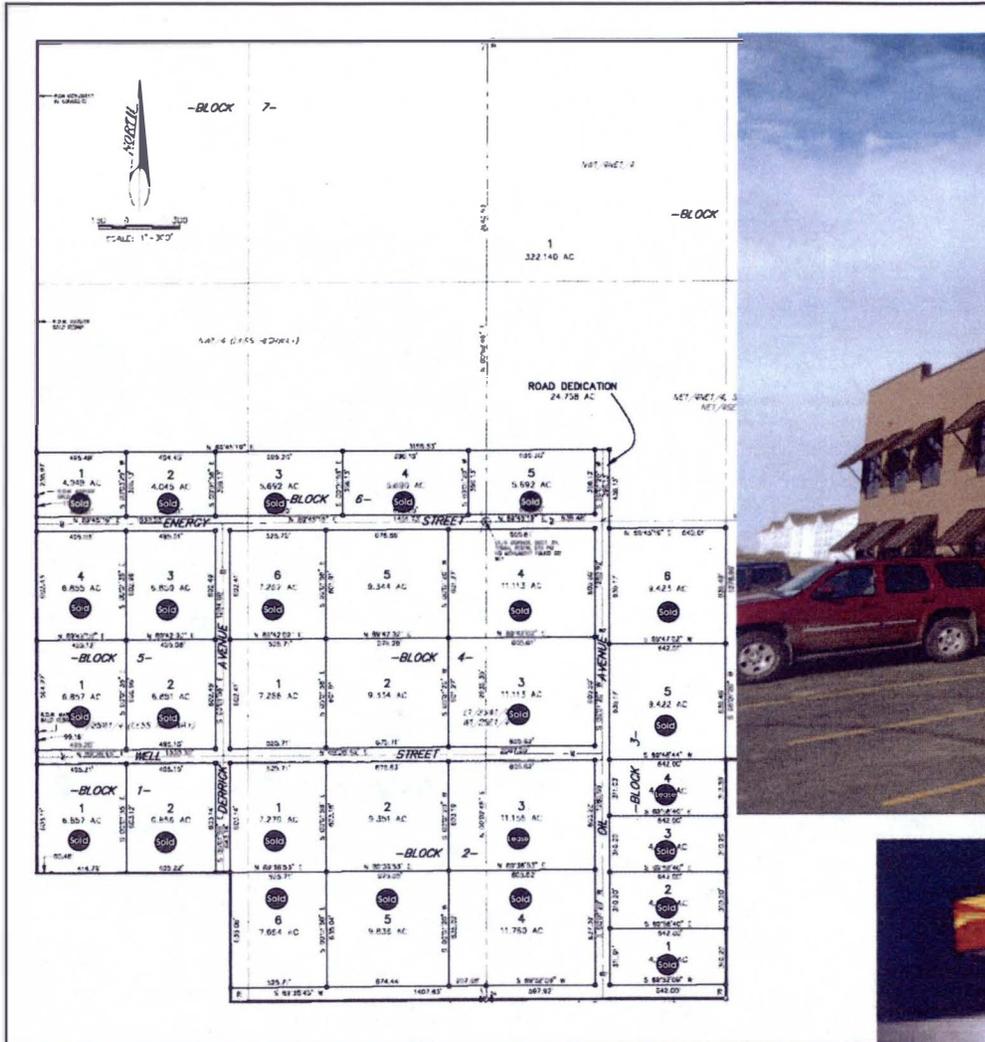
Renaissance Heights
Acres: 40
Zones: R-4
Multifamily Units: 270



Williston Fire Station #2
Projected 15,500 sf. ft. facility



North Star Center
 Acres: 535
 Zones: R-2, R-3, R-4
 Multifamily Units: 1274
 Single Family Homes: 268



Bakken Industrial Park
 Acres: 640+
 Zoning: C-2, M-2, R-5
 Mobile Home Units: 138
 Recreational : 437



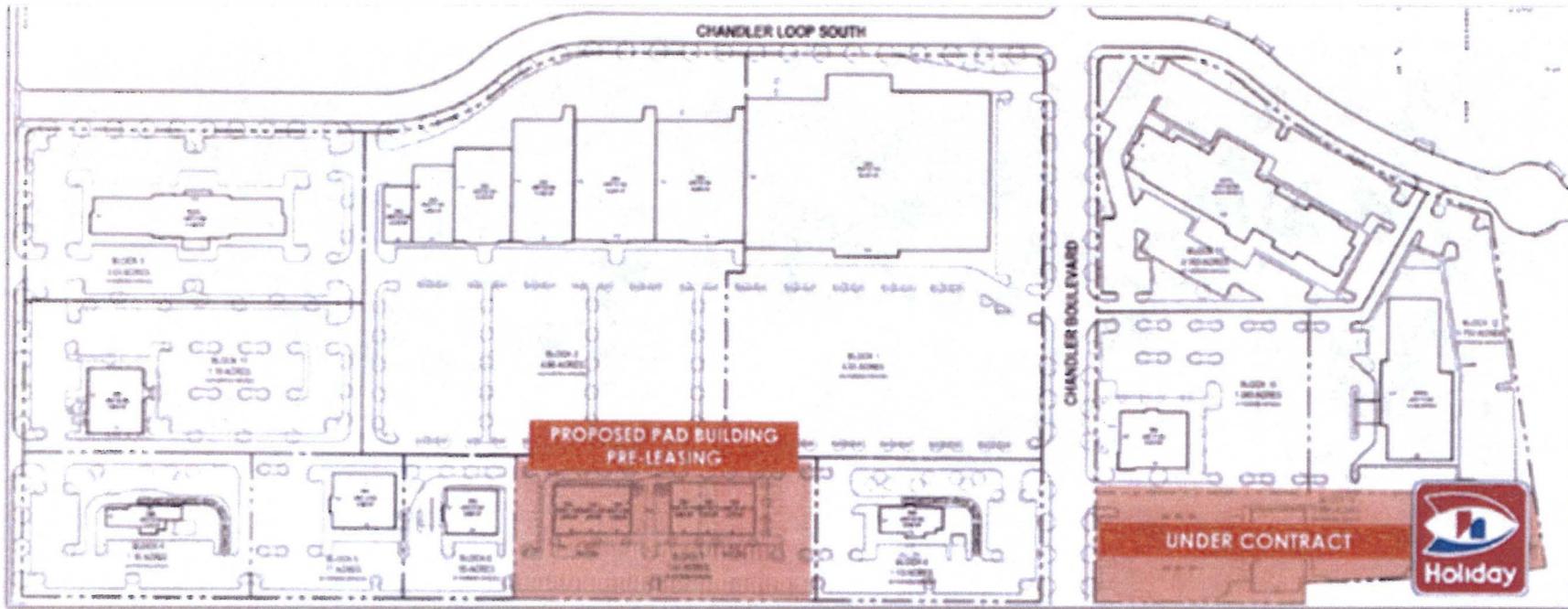
Williston Crossings



Williston Airport



Williams County Shop

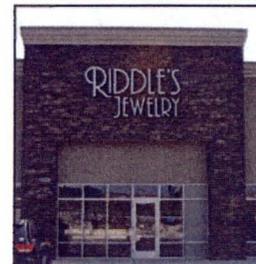


Chandler Field Subdivision
 Acres: 110
 Zones: C-2, R-3, R-4
 Multifamily Units: 1300

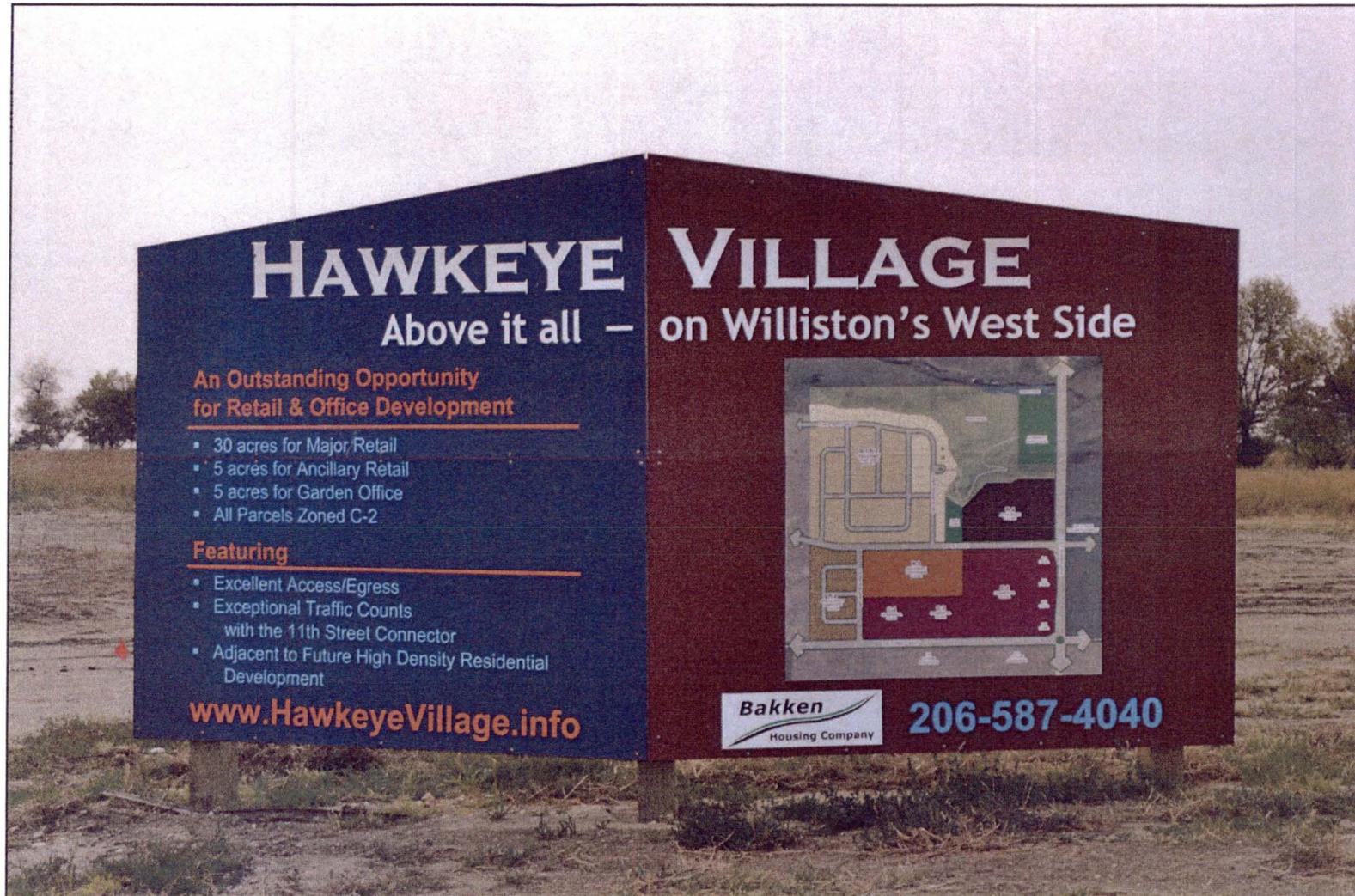




Skyland Subdivision
Acres: 79.63
Zones: R-4
Multifamily Units: 1200



Sand Creek Town Centre



Hawkeye Subdivision

Acres: 79.63

Zones: R-4

Multifamily Units: 400

Single Family Homes: 162



Eagle Crest Subdivision
Acres: 7.75
Zones: R-4
Multifamily Units: 168



Williston High School



Harvest Hills Subdivision

Acres: 310

Zones: C-2, C-3, R-1, R-3

Multifamily Units: 1765

Single Family Homes: 622

Town Homes Units: 563



Fairhills Subdivision

Acres: 152

Zones: C-2, R-1, R-3

Multifamily Units: 561

Single Family Homes: 125



Bakken Heights Apartments
Multifamily Units: 320



Creekside Subdivision



18th Street Underpass

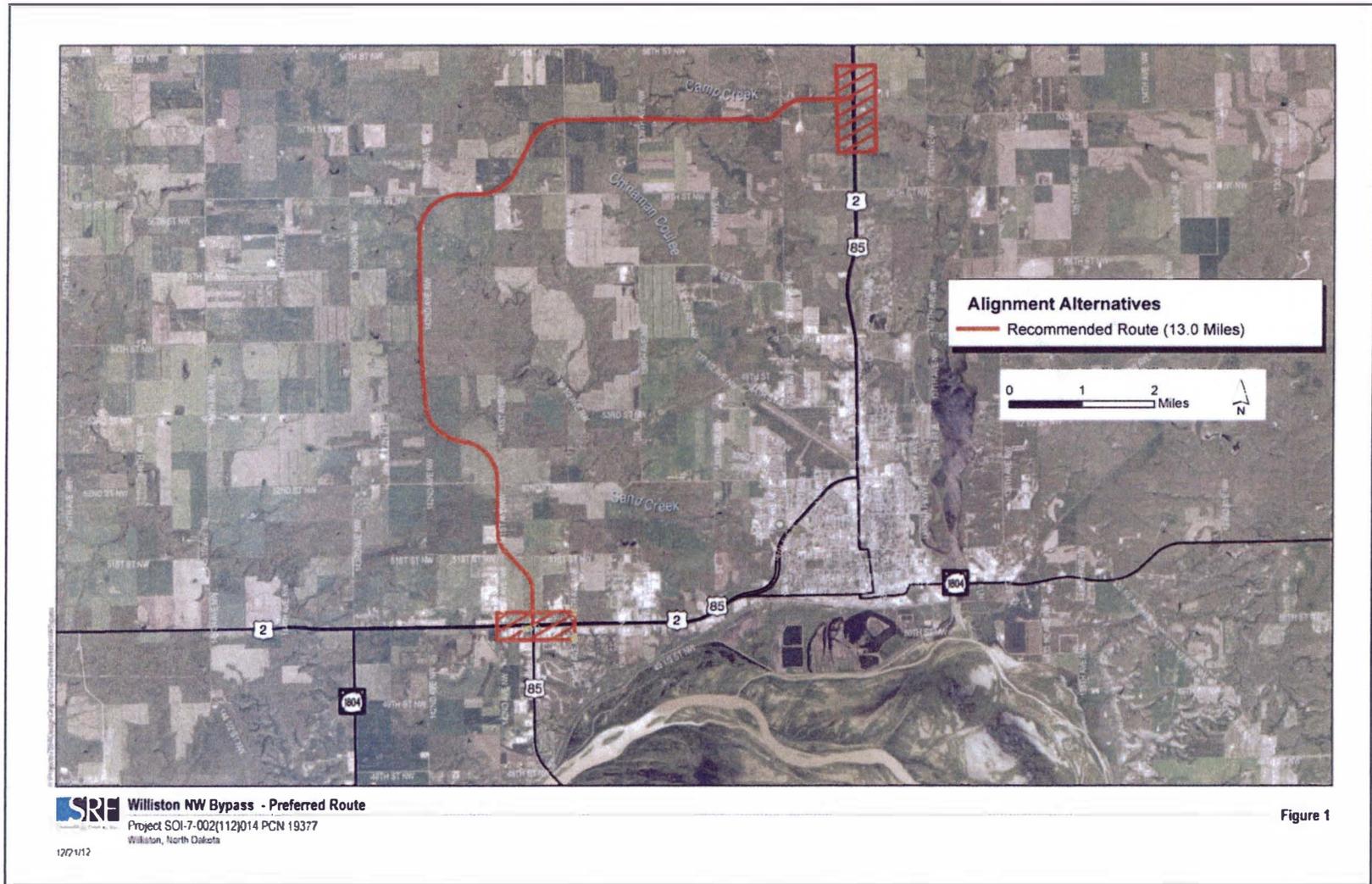


Figure 1

Truck Route



Renaissance on Main
Multifamily Units: 60



City Hall
Auditor, City Commission



Williston Center for Development
Department of Building Safety, Planning and Zoning, Economic Development, Small Business Development Center,
Tri-County Regional Development Council and CVB



Williams County Courthouse



TrainND

Williston Economic Profile

Williston has been labeled the fastest growing micropolitan the last four years. Between 2012 and 2014 Williston had seen a population increase of 20%. Demand for economic growth is still evident in a city trying to catch up from several years of a break neck pace.

City officials remain on an aggressive 5-year infrastructure improvement plan totaling more than 1-Billion dollars that will include a new airport, wastewater treatment facility, surface transportation, public fire and safety building expansions, and quality of life enhancements.

The driving force behind Williston's exponential economic growth is the oil and gas industry. Williston is the lifeblood of North Dakota's prosperous economy driving North Dakota to the 2nd largest oil producer in the United States and producing over a million barrels of oil per day. The increase in activity has moved Williston to number one in North Dakota sales tax in the state.

School Enrollment

Public:	District 1:	3405 enrolled
	District 8:	352 enrolled
Private:	St. Joseph's :	162 enrolled
	Trinity Christian:	302 enrolled
Post Secondary:	Williston State College <i>*Free College Option</i>	162 enrolled

Utilities Electricity

Region 1—Williams, ND:	2012 Demand	186 MW
	2032 Demand	617 MW
	Total Increase	431 MW

Demographics

County:	Williams	
Williston's Micropolitan Population:	32,130	
Growth Since 2010:	43.5%	
Male:	52.1%	
Female:	43.5%	
Household Income:	Median	\$76,210
	Average	\$81,276

Water (Western Area Water Supply)

- Services Williston, Watford City, Ray, Tioga, Stanley, Wildrose, Crosby, Fortuna, Noonan, Columbus and Ross.
- Service area includes 5 counties: Burke, Divide, McKenzie, Mountrail and Williams.
- Currently providing water to over 70,000 people.
- Estimated to provide water to 160,000 people by 2038.

Waste Water

In order to expedite the project and ensure the water demands of Williston and the surrounding communities could be met, the expansion to the Williston WTP is being completed in two phases. The first phase of the expansion includes miscellaneous improvements to the existing water treatment plant as well as an addition to the existing facility. Key water process improvements included in the addition to the existing facility include the construction of a 1 million gallon reinforced concrete clearwell, a reinforced concrete backwash reclamation basin, six new reinforced concrete gravity filters.

Transportation

Highway:

- Hwy 2 serves as the main east-west connection. US 2 spans over 2,500 miles across the northern continent in the US
- US Hwy 85 is the major north-south connection and span over 1,400 miles from the Canadian to the Mexican border.
- ND Hwy 1804 is an alternate east-west connection

Airport:

- Delta and United Airlines with flights to Denver, Houston and Minneapolis.
- Rental Agency located at the airport are Avis, Hertz and Enterprise.

Railway:

- Amtrak, the national passenger rail system, serves Williston. The Empire Builder operates daily in each direction between Portland, Seattle and Chicago.
- BNSF connection Williston to the Port of Van
- Five trans load facilities in Williams County.

HealthCare

Mercy Medical:	40,000 sq. ft. ambulatory center
Trinity Clinic:	60,000 sq. ft. medical facility

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Williston Economic Profile

Community Overview

As per the U.S. Census Bureau, the City of Williston has been labeled the fastest growing micropolitan (cities with populations under 50,000) in the nation for the past four years.

The increased oil and gas exploration within the Bakken Shale has led Williston to experience one of the largest economic expansions in U.S. history.

Population:	2012 Adjusted Service Population	2014 Adjusted Service Population	Percent Change
Williston	25,915	31,143	20.2%
Williston and 6 Surrounding Townships	36,182	42,363	17.1%
Williams County	44,308	52,778	19.1%

Tax Climate

State:

State Sales Tax:	5%
Income: Individual Tax:	5-Brackets not to exceed 3.22%
Corporate Tax:	3-brackets not to exceed 4.53%

Local:

Sales Tax:	City of Williston:	1%
	Parks and Rec Dept:	1%
	Williams County:	1%
	Hospitality Tax:	1%
	2014 City Sales Tax Collections: *	\$984,433,645
	*through 3rd Quarter 2014	
Property Tax:	City Mill Levy:	31.83%
	2014 Property Tax Total Levy:	\$3,519,468
	2015 Property Tax Total Levy:	\$4,268,053

Capital Improvement Needs

2015 - 2020

CATEGORY	BIENNIUM		
	2015 - 2016	2017 - 2018	2019 - 2020
Transportation	\$141,225,000	\$213,421,600	\$113,000,000
Wastewater	\$74,937,120	\$43,356,400	\$9,543,520
Water	\$12,322,580	\$23,609,200	\$18,427,040
Stormwater	\$23,376,000	\$8,386,000	\$4,000,000
Solid Waste	\$7,000,000	\$8,630,000	TBD
Airport	\$178,351,000	\$51,394,500	TBD
Public Buildings	\$57,165,000	\$50,805,000	\$6,500,000
Totals	\$494,376,680	\$396,602,700	\$151,470,560*

6-Year Capital Needs = \$1.04B

City Government

The City of Williston is led by a commission form of government that consists of five commissioners one of which is designated the Chairman or Mayor. These individuals constitute the legislative body of the city and, as a group, are responsible for taxation, appropriations, ordinances, and other general functions. Individual commissioners are also assigned executive responsibility for a specific aspect of municipal affairs such as, public works, finance, or public safety.

Departments: Airport, City Auditor, Department of Building Safety, Public Works, Economic Development, Planning and Zoning, Police and Fire

2015 City Size: 14,167 acres
196% change since 2010

2015 City of Williston Employment: 256
137% change since 2010

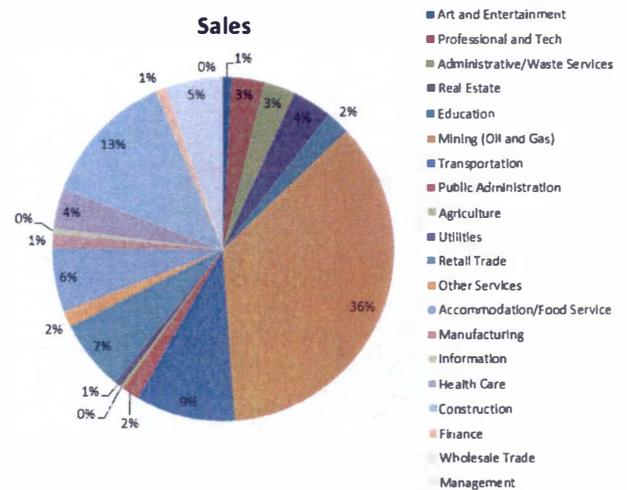
2015 Operating Budget: 281,295,553
820% change since 2010

www.cityofwilliston.com

Labor Analysis

Civilian Labor Force:	9,736
Unemployment:	Williston/Williams: 1% North Dakota: 2.8%

Employment by Sector



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Williston/Williams County Workforce Profile

2013 vs 2014 Census of Employment Growth

	3rd Qtr 2013	3rd Qtr 2014	%
Williams County			
Art, Entertainment & Recreations	305	379	24%
Professional & Technical Services	1,046	1,280	22%
Administrative & Waste Services	1,003	1,227	22%
Real Estate & Rental/Leasing	1,312	1,565	19%
Educational Services	780	926	19%
Mining, Quarrying, and Oil & Gas	12,732	14,943	17%
Transportation & Warehousing	3,411	3,928	15%
Public Administration	576	663	15%
Ag, Forestry, Fishing & Hunting	118	134	14%
Total, All Industries	38,336	42,540	11%
Utilities	256	279	9%
Retail Trade	2,547	2,751	8%
Other Service (except Public Admin.)	605	647	7%
Accommodation & Food Services	2,405	2,528	5%
Manufacturing	553	552	4%
Information	193	197	2%
Health Care and Social Assistance	1,573	1,599	2%
Construction	5,214	5,278	1%

Source: Labor Market Information Center, Job Service North Dakota, QCEW Unit

Employers

Mining, Quarrying, and Oil and Gas Extraction: 14,943
(Private industry employment)

Largest Employers (2013)

- Halliburton Energy Service
- Nabors Drilling USA
- Nondisclosable
- Nondisclosable
- Sanjel (USA)
- Williston Public School District
- Nondisclosable
- Mercy Medical Center
- Nondisclosable
- Nondisclosable

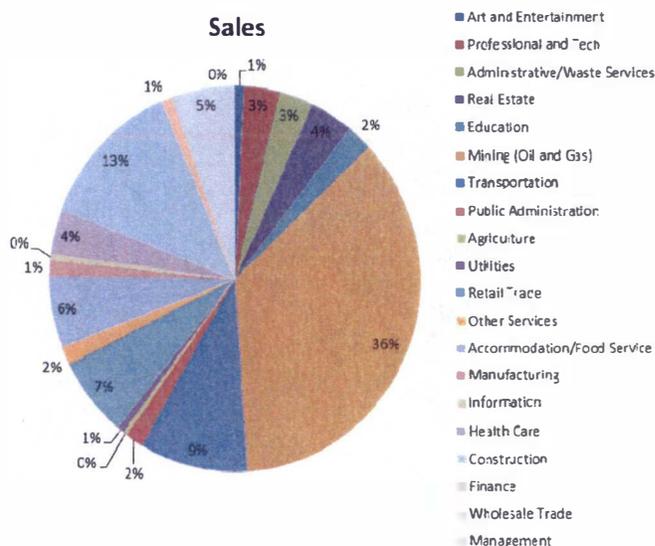
Business Establishments (Q3 2014)

Williams County: 2,358
North Dakota: 31,744

	<u>Job Openings</u>	<u>Active Resumes</u>
Williams County:	1,746	845
North Dakota:	23,496	9,624

2015 City of Williston Employment: 256
137% change since 2010

Employment by Sector



Labor Analysis

Civilian Labor Force: 39,736
Unemployment: Williston/Williams 1%
North Dakota: 2.8%

Labor Force and Unemployment

Labor Force:

Williams County: 33,204
North Dakota: 416,643

Income:

Per Capita Personal Income (2013)
Williams County: \$115,897
North Dakota: \$53,182

Median Household Income (2009-2013)

Williams County: \$76,210
North Dakota: \$53,741

Williston/Williams County Workforce Profile

Employees/Workers

Class of Worker:	William County	North Dakota
Private Wage and Salary Worker	77.8 %	74.5%
Government Workers	13.2%	16.8%
Self-Employed Workers	8.9%	8.3%
Worker Occupations:		
Management, Business, Science and Occupations	26.8%	34.6%
Service Occupations	15.1%	17.2%
Sales and Office Occupations	23.4%	23.3%
Natural Resources, Construction and Maintenance Occupations	19.1%	12.6%
Production, Transportation and Material Moving Occupations	15.6%	12.3%
Usual Worker Hours:		
<i>% of employed population 16 years and over</i>		
Work 35 or More Hours per Week	83.6%	77.2%
Work Between 15 and 34 Hours per Week	15.1%	17.2%
Work Less Than 15 Hours per Week	2.5%	4.5%
Average Weekly Hours	45.5%	40.0%

Other Employment Resource



Job Service North Dakota has its roots in the Social Security Act of 1935, when Congress established unemployment insurance as part of an employment security system designed to provide an economic safety net during the height of the Depression.

Since then, Job Service North Dakota has broadened its mission to involve all areas of workforce development including individuals, businesses and community leaders.

Workforce Intelligence:

North Dakota's Workforce Intelligence Network (NDWIN) is an easy-to-use, powerful online tool to access labor market information.
www.ndworkforceintelligence.com/analyzer/default.asp?fromaitentry=1

Business Tool to Recruit New Employees:

Find employees with Job Service North Dakota's advanced search tool. Post job openings, search resumes and access labor market information online.
www.jobsnd.com/business

Employee/Individual Resource:

Land a job with Job Service North Dakota's advanced search tool. Create a profile, build your resume and submit applications online.
www.joosnd.com/individuals

Veteran Employment Resource:

Job Service North Dakota assures that veterans and eligible spouses of veterans receive access, on a priority of service basis, to the agency's full range of employment and training services.
www.jobsnd.com/individuals/veterans

<http://findthegoodlifeinnorthdakota.com/>



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Williston Commercial/Industrial Profile

Williston has been labeled the fastest growing micropolitan the last four years. Between 2012 and 2014 Williston had seen a population increase of 20%. Demand for economic growth is still evident in a city trying to catch up from several years of a break neck pace.

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The driving force behind Williston's exponential economic growth is the oil and gas industry. Williston is the lifeblood of North Dakota's prosperous economy driving North Dakota to the 2nd largest oil producer in the United States and producing over a million barrels of oil per day. The increase in activity has moved Williston to number one in North Dakota sales tax in the state.

Net Average Rent Per Square Foot

Office Space:	\$27 to \$28 sq. ft.
Retail Space:	\$27 to \$28 sq. ft.
Industrial (Shop):	\$18 to \$20 sq. ft.

Immediate Demands

Office:	400-450,000 sq. ft.
Retail:	700,000 sq. ft.

Resources

Department of Building Safety:	701-577-8115
Planning and Zoning	701-577-8107

www.cityofwilliston.com

2010-2015 Permit Valuations

New Commercial:	\$691,986,176
Commercial Alterations:	\$146,017,697
New Structures:	306

2015-2020 Projections

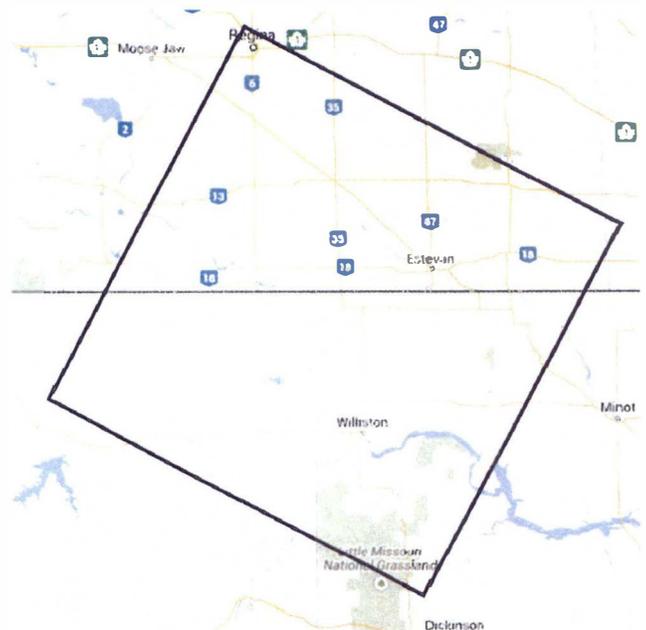
New Construction Valuation:	\$737,288,900
Structural:	462

Vacancy Rate

Office Space:	2.5%
Retail Space:	2.5%
Industrial:	_____

Current Commercial Market

Office Space:	500,000 sq. ft.
Retail Space:	1,000,000 sq. ft.



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Williston Residential Profile

Residential Overview

Williston is the nation's fastest growing micropolitan over the past four years. Between 2012 and 2014 Williston has experienced a 20% change in growth. The demand for permanent housing has far outpaced the supply. Thus you can experience high rental rates similar to those found in metropolitan areas. Record amounts of building have occurred over the past few years somewhat easing the demand. However you will still see a great need for permanent housing and this need will continue over the next several years.

2010-2015 Residential Overview

2014 Building Permit Valuations:	500,342,125 1.7 billion since 2010
Overall Housing Stock:	13,853
<u>2010-2015</u>	
Multiple Family:	5,431
Single Family:	1,122
Duplex:	82
<u>Manufactured/Mobile</u>	<u>644</u>
Total Housing Since 2010	7,279

Rental Rates

1 bedroom :	\$1,100
2 bedroom:	\$2,200
3 bedroom:	\$3,300

RV Camps, Hotels, Crew Camps and Permitted Housing

- City of Williston – 4,190
- City of Williston and Six Surrounding Townships – 5,802
- City of Williston, six surrounding townships and Williams County – 4,483

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2015-2020 5 Year Projections

Single Family:	3,448
Multiple Family:	10,548

Number of Homes on the Market

(as of 04/01/15)

Single Family:	140
Townhomes/Condominiums:	14
Under \$150,000:	12
150,000-250,000:	20
250,000-350,000:	41
350,000-450,000:	45
450,000-above:	22

Resources

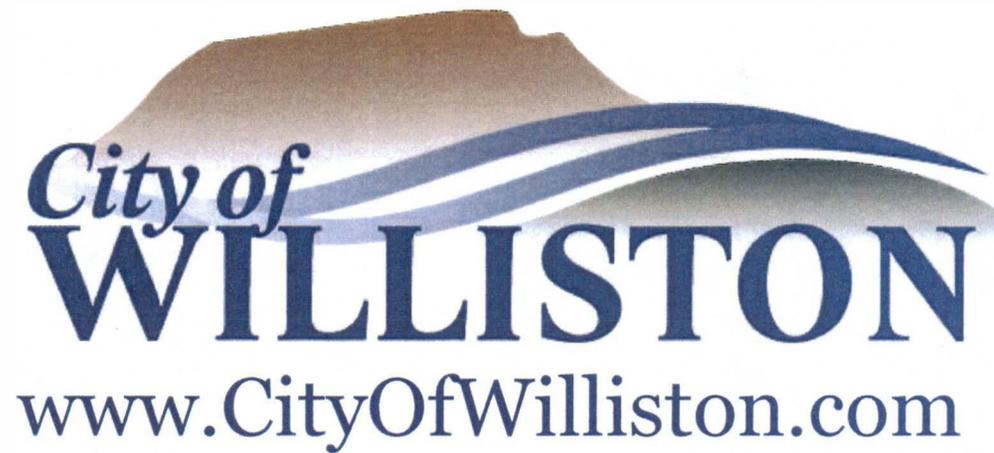
Department of Building Safety:	701-577-8115
Planning and Zoning	701-577-8107
www.cityofwilliston.com	

Housing Incentive Fund Development

The HIF Fund supports the development of affordable multi-family housing units for essential service worker, main street employees and fixed income household.

Program Guidelines: www.ndhfa.org





City of
WILLISTON

www.CityOfWilliston.com