



# **North Dakota Communities Acutely Impacted by Oil and Gas Development: Williston Housing Demand Analysis**

**Final Report  
December 20, 2010**

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**Study timeframe August—December 2010**

## North Dakota Communities Acutely Impacted by Oil and Gas Development

### Introduction

#### Purpose

*North Dakota Communities Acutely Impacted by Oil and Gas Development: Housing Demand Analysis* is a large-scale research project conducted to inform decision-makers about housing needs given the magnitude, trajectory, and sustainability of oil and gas development in northwest North Dakota. As such, the study has many stakeholders and given the evolving nature of the Bakken and Three Forks “plays” the report authors have had to reconcile many facts and opinions in order to develop models that best reflect reality and model likely futures. Nonetheless, the purpose of the study is to document and demonstrate permanent ongoing housing needs in the northwest North Dakota communities of Parshall, New Town, Stanley, Tioga, Watford City, and Williston for the next 20 years at five-year intervals.

#### Study Delimitations

Delimitations are the boundaries that confine the study’s extent in time, space, and subject matter. *North Dakota Communities Acutely Impacted by Oil and Gas Development: Housing Demand Analysis* is restricted to northwest North Dakota in particular the North Dakota Bakken/Three Forks footprint. An understanding of the extent of this footprint was derived from a *Bakken Drilling/Spacing and Well Spot Basemap* issued by the Oil and Gas Division of North Dakota’s Department of Mineral Resources in mid-November, 2010.

While a number of oil and gas impacted cities in northwest North Dakota were invited to join the study, the study was capped at six cities. The participating cities are Parshall, New Town, Stanley, Tioga, Watford City, and Williston. Furthermore, the study’s boundaries were fixed at these cities’ current city limits.

The study’s time frame was set to cover a 20-year span (2010 to 2030) featuring snapshots at five-year increments—2010, 2015, 2020, 2025 and 2030. The populations reported for the six cities are forecasted population potentials based on oil and gas drilling and production. Housing needs are determined for permanent ongoing population rather than short-term housing needs for transient workers.

#### Study Limitations

Limitations are weaknesses and this study has several. First, this study was completed in a short time window. Data collection, analysis, and report generation occurred between September and December, 2010. Second, the Bakken//Three Forks oil and gas play is very dynamic and its potential is not yet fully known. Third, one of the documents necessary to complete the study, an oil and gas occupation and employment study was late. Fourth, this study’s population forecasts assume all of the six study cities can absorb their

proportionate population potential. Fifth, the study does not include current or future temporary and permanent population increases from infrastructure construction projects, oil and gas construction projects, development of other industries, or development of other mineral formations.

### **Methodology**

While the study's time dimension extends from 2010 to 2030, the actual study was more complex. Given that the 2010 census has not been released, it was necessary to determine a baseline 2010 population and demographic profile for each of the six study cities. The derived 2010 population baseline is in effect a count of each city's housing and includes those living in temporary quarters and those living in permanent housing. This baseline served as a performance milestone reported in an interim report circulated October 18, 2010.

The next challenge was to develop an understanding of Bakken/Three Forks oil and gas drilling, production, extent (footprint), duration, and lifecycle. While determining each city's 2010 population relied on visits, phone calls, and data requests to many individual informants across northwest North Dakota, this part of the study depended on gathering expert opinions from a small number of highly placed state and industry informants. Since industry estimates of the Bakken/Three Forks potential are so diverse, information supplied by Mr. Lynn Helms, Director of North Dakota's Oil and Gas Division, Department of Mineral Resources was used as the primary source to build a model of oil and gas development-driven population growth. This model was first derived for the entire Bakken/Three Forks footprint and recognizes permanent employment from primary, secondary, and induced sources. (Induced employment is employment needed to supply services to the primary and secondary sectors. Induced employment has been referred to as "the butchers, bakers, and candlestick makers.") These permanent employees were then converted to an estimate of household population.

The Bakken/Three Forks play has distinct lifecycle phases.

- Phase One is underway now and involves drilling to secure leaseholds. According to Director Helms, this phase should be completed by 2014 with the drilling of 7,000 wells.
- Phase Two has started in some districts and is pattern drilling, that is, drilling a number of wells to best exploit the oil and gas potential of a defined acreage.
- Phase Three is the production phase and has begun for completed wells. A key characteristic of the Bakken formation is that production output is gas-driven and total fluids recovered decline rapidly after the first years of production.

Phase Two pattern drilling information supplied by Director Helms spanned an upper and lower bound of 28,000 pattern wells to 14,000 pattern wells. To refine this spread three population scenarios were developed, one based on a Bakken/Three Forks expected pattern drilling of 21,000 wells as well as a pessimistic 14,000 wells and the optimistic 28,000 wells.

Total Phase One and Phase Two wells are a pessimistic 21,000 total wells (7,000 Phase One wells plus 14,000 Phase Two wells), an expected 28,000 total wells (7,000 Phase One wells plus 21,000 Phase Two wells), and an optimistic 35,000 total wells (7,000 Phase One wells plus 28,000 Phase Two wells).

The lifecycle phases, declining fluid production, and three pattern drilling options were incorporated into a unified model and population potentials for each of the six cities were determined. This is the brief report circulated December 6, 2010.

Again, population potentials are expected city populations if new comers can be accommodated. If a community falters and cannot provide housing, its share will live in those communities that can.

The final challenge was to allocate each city's population potential based on permanent employment projected at five-year intervals across key housing-related variables. These include the following.

- Housing projections by tenure and by type. (Tenure refers to renting versus owning and type includes single family, multi-family, and mobile homes. It is assumed that each city's housing tenure and type will normalize to pre-Bakken/Three Forks conditions. That is, while a city may in 2010 have a higher percentage of mobile homes than in 2000, by 2030 the percentage of mobile homes will be similar to what the city hosted in 2000.)
- Population by age cohort. (Population by age cohort reports cohorts in five-year increments and was derived by aging the current population, adding new comers at a ratio of 25 percent in cohorts 40 years and older and 75 percent to cohorts spanning zero to 39 years. Finally cohort increases and decreases were figured by applying North Dakota birth and mortality rates.)
- Households by age. (Households by age was determined using information developed in the first two variables described above to allocate householders to three age categories –young householders, 15 to 39 years of age; middle years householders, 40 to 64 years of age; and retired householders, 65 years and older— to three tenure categories owner, renter, and total households.)
- Household income by percent. (Known household median incomes and poverty rates for 2000 and 2010 anchored projections of future poverty rates and median incomes. Here it is assumed that over time poverty rates will fall to Mercer County, ND's current level (7.2 percent) since Mercer County reflects a mature extractive industrial base. It is assumed that median incomes and poverty thresholds will rise with the consumer price index (CPI). Median incomes should stabilize as less overtime will be paid as the oil and gas industry normalizes.)
- Household income by number of households. (This representation converts household income by percent to the number of households in particular income categories.)
- Households by affordable rent/mortgage. (This representation reports the level of rent affordable by the number of households in income categories. It assumes affordable rent and an affordable mortgage is 30 percent of household income.)

- Households by size. (Households by size report the number of individuals living in a household. These households were allocated across renter households and owner households. )

In addition, a model estimating new construction rental rates was generated. This model estimates the rental rates needed to pay back a multi-family apartment building in five, ten, 15, 20, and 25 years and is intended to provide an understanding of market-rate rent and investor time horizons.

### **Overall Findings for the Bakken/Three Forks Footprint**

It is an exciting time to live in northwest North Dakota. Jobs are readily available and the population is growing rapidly. Newcomers are younger than the region's typical resident and the population mix is changing. In future years more attention will be commanded by the needs of younger households rather than older households. For example, school-aged cohorts will increase strongly. Since the 2000 census, median household incomes have zoomed and rates of poverty have dropped dramatically.

Since the 2000 census, over 23,000 people have been attracted to northwest North Dakota. While this is favorable given the region's long history of population decline, it is important to understand the region 20 years into the future so that over building does not occur. Given the three pattern drilling options (14,000, 21,000 and 28,000 wells), at 2030, the permanent population of the Bakken/Three Forks footprint would be approximately 92,500, 106,000, or 128,500 people respectively. However this permanent population is similar to that of the Bakken/Three Forks footprint attained at 2018.

The rig-related transient population of the Bakken/Three Forks footprint will be significantly higher. Rig-related transients (including, direct, secondary, and induced workers) add approximately 6,250 people to the overall Bakken/Three Forks footprint before leaving with the end of pattern drilling.

The buildup and relative decline of population presents challenges and opportunities across northwest North Dakota. While a stable core of housing is needed to house the region's ongoing permanent population, a large population will need decent housing all during Phase Two. Second, infrastructure and services needs to be funded at levels that service not only the region's ongoing permanent population but meet the needs of the large permanent and transient population experienced before pattern drilling ends.

Creative housing solutions of all types are needed. Crew camps providing controlled, safe, decent, and all-weather housing must be encouraged. Semi-permanent housing solutions are a must. Permanent housing that conforms to the oil and gas lifecycle should be pursued.

Given 2010 construction costs, market rate rents for new two-bedroom apartments easily top \$1200.00. Since little construction has occurred in prior decades and the large demand associated with Phase Two pattern drilling and construction projects, apartment rents

will remain high. Affordability is an issue across the region since only about half of the region's households can afford new market rate housing.

North Dakota decision makers need to monitor oil and gas activity, infrastructure and construction projects, and other new industries, and be prepared to act depending on the scenario that unfolds. The Bakken/Three Forks is dynamic and the future is still uncertain.

### **Report Organization**

Each city's report is organized in the following manner. An executive summary highlighting key findings and concerns is followed by a recommendation section. After the recommendation comes Appendix A, Graphs and Tables. Here data elements for the city's population, housing units, mix of housing units, householders by age cohort, households by income, housing affordability by household income, and households by size are reported. Again, these customized data tables are constructed using the expected pattern drilling value of 21,000 wells (28,000 total wells). Also included in Appendix A is a model that develops market-rate rents for new apartment construction given paybacks set at five, ten, 15, 20, and 25 years. Appendix B is the interim report used to determine the city's 2010 population. This population includes transients as well as permanent people residing within the city's boundary, rental stock and rental rate information. Appendix C includes any materials received after December 6, 2010 about the city's infrastructure needed given population potentials.

### **Williston**

#### **Executive Summary**

While the future is bright, if pattern drilling in the Bakken/Three Forks conforms to the expected 21,000 wells and other cities in the region can accommodate their proportionate population shares, certain measures need to be taken. That is, Williston must plan for accommodating a particular sustainable population in permanent housing units and accommodating a peak population in temporary and semi-permanent housing. With these conditions, at 2030 the city's population and housing units will be equivalent to the population and associated housing units expected in 2018. That is, Williston's 2018 and 2030 permanent population will be approximately 20,900 people requiring about 9,700 total housing units. As stated earlier, this assumes all other cities within the Bakken/Three Forks footprint can accommodate their proportionate population potential.

As time passes the mix of housing unit type (single family homes, multi-family homes, and mobile homes) will normalize with a smaller percentage of mobile homes and a larger percentage of single family homes. However, the need for multi-family units will remain at a near constant percentage (approximately 28 percent of total housing stock) across time.

The median age cohort of Williston will fall from the 35 to 39 year age cohort at 2000 to 30 to 34 years at 2015 and will remain so until returning to 35 to 39 years at 2030. The greening of Williston has a number of implications. First, those cohorts associated with

primary and secondary education (five to nine years, ten to 14 years, and 15 to 19 years) will increase by over 50 percent between 2000 and 2030. Second, those 65 years and older will decline slightly from 2010 to 2015 and will only increase about 19 percent between 2010 and 2030.

Williston is a much wealthier city in 2010 than in 2000. At the 2000 census Williston's median household income was \$29,688. By 2010 its median household income zoomed to \$55,000. While the oil and gas industry is responsible for this increase, in subsequent years it is expected that employment will normalize and less overtime will be paid. Induced employment likely pays less than does the oil and gas industry so it is likely that the city's median will only rise with the consumer price index. Using this logic by 2030 Williston's median household income will be just over \$69,800.

In the next years Williston will see a dramatic decline in the rate of poverty; however, absolute numbers of those in poverty will increase in 2015 and following years before declining in 2030. Nonetheless, affordability of housing will be an issue in Williston. Applying North Dakota Housing Finance Agency's rule of thumb, a median household income of \$55,000 will allow for a suggested 30 percent rent payment of \$1,375 per month. Since so few buildings have been constructed in the city in recent years, older buildings that should command lower rents are not available and new construction costs require rents of approximately this amount to payback an apartment building's cost in 15 years. (See Appendix A.) As the median income in 2010 is reported to be \$55,000, half of Williston's households would not be able to afford \$1,375 per month.

### **Recommendations**

As a general recommendation, decision makers need to monitor oil and gas activity to understand the sort of drilling scenario that develops. The city must plan to accommodate its peak population with temporary and semi-permanent housing and must plan to accommodate its sustainable population with permanent housing options. Some moderate overbuilding is healthy and will trigger the removal of less desirable housing and housing types.

If possible, Williston should control and rationalize contiguous developments by annexations and by enlarging its extra-territorial zone.

While this report allocates population potentials across the entire Bakken/Three Forks footprint and to the six study cities, Williston is well positioned to accommodate new employees and population growth beyond the reported "potential." If other cities cannot act to house new residents, these people will gravitate to those communities such as Williston that can. In addition, this report does not recognize the oil and gas development that is likely to occur in eastern Montana. As a major oil and gas service center, Williston's likely population should be higher still.

Williston needs to encourage the development of more temporary or semi-permanent housing that can be withdrawn or converted to other uses as temporary workers are no longer needed and if permanent employment falls. Thus, pressure must be placed on industry to provide crew camps that provide all-weather, safe, decent, and controlled housing for temporary construction and drilling-related employees.

A style of housing that might prove useful for oil and gas impacted cities is one designed for the oil and gas drilling/production lifecycle. Such housing might consist of attached single-story suites that initially are intended for extended-stay use. As need dictates, two of these suites could be joined as an apartment. Later as need dictates, the apartments could be sold as condos.

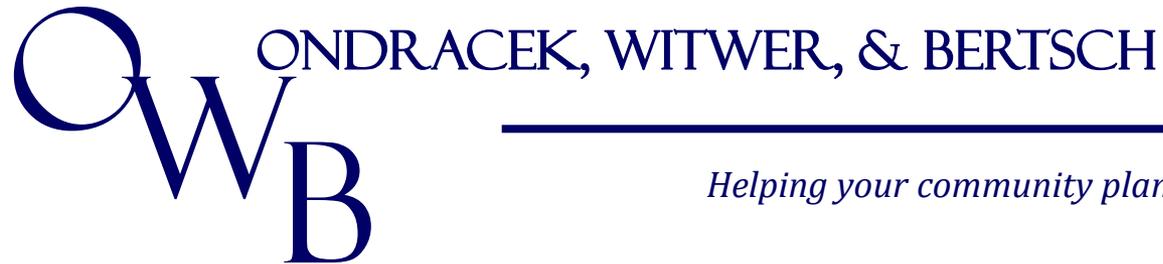
Currently there is modest need for additional market-rate senior housing in Williston. Williston will need infrastructure that accommodates a younger rather than older population.

Housing affordability is an issue in Williston. New construction is expensive and is affordable for those whose earnings are at and above the city's median income level. The city needs subsidized housing for its poor and lower income earners. Those who do not qualify for subsidized housing and do not earn incomes approaching the city's median are under extreme pressure.

Given the large budget deficits and national debt, aid from the federal government will be limited. Solutions for affordable housing must be sought at the upcoming North Dakota Legislative session since market mechanisms will fail those earning below median incomes. A possible state-level solution would be housing tax credits. Housing tax credits would be superior to a simple appropriation since the state's input is magnified. Instead of an unmatched appropriation, the state's input is foregone tax collections leveraged with private tax-payer funds paid to receive the tax credit benefit.

A final recommendation is this. *North Dakota Communities Acutely Impacted by Oil and Gas Development: Housing Demand Analysis* contains a wealth of data that can be mined by a variety of stakeholders to understand Williston at 2010 and into the future. With this as a guide, fitting solutions can be crafted for many of the challenges facing the city.

# Appendix A: Graphs and Tables



*Helping your community plan for the future*

**North Dakota Communities Acutely Impacted  
by Oil and Gas Development:  
Housing Demand Analysis:  
Williston Graphs and Tables**

**December 20, 2010**

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**North Dakota Communities Acutely Impacted  
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Housing Demand Analysis**

- Purpose of study
  - To inform decision-makers about permanent housing needs given the magnitude, trajectory, and sustainability of oil and gas development in northwest ND

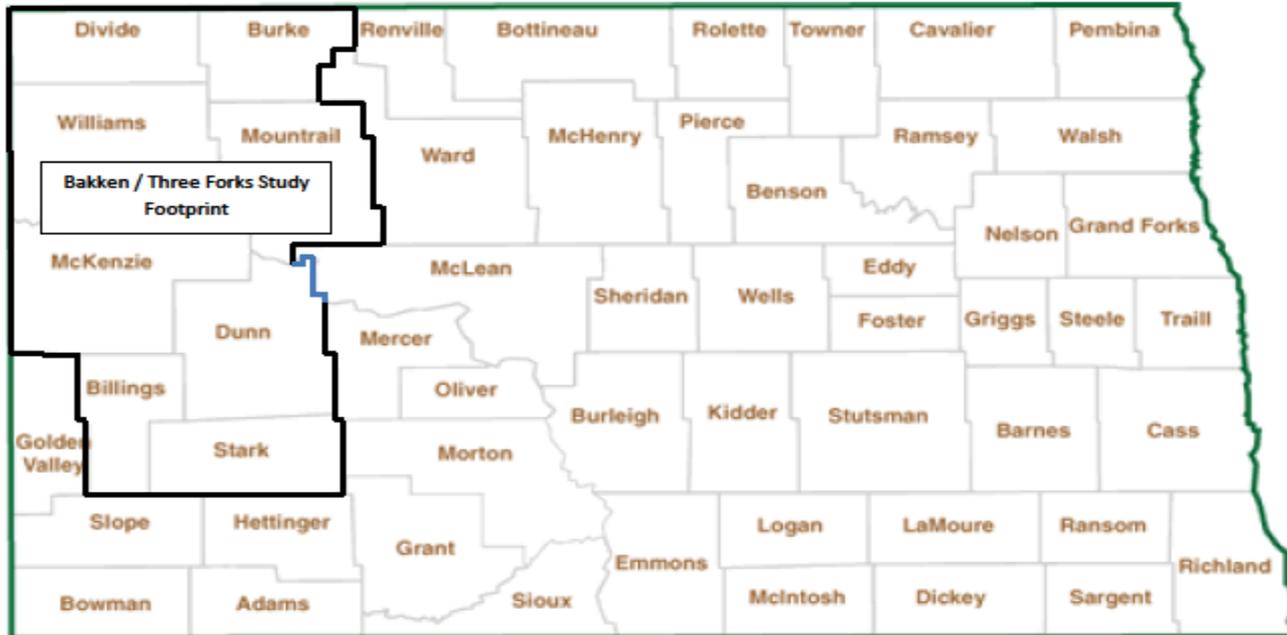
# **North Dakota Communities Acutely Impacted by Oil and Gas Development: Housing Demand Analysis**

- Study boundaries
  - Northwest North Dakota
  - ND Bakken/Three Forks footprint
  - Parshall, New Town, Stanley, Tioga, Watford City, and Williston – city limits
  - Twenty year span (2010 to 2030 in five-year increments)
  - Population potentials based on drilling and production
  - Housing needs of permanent population

# North Dakota Communities Acutely Impacted by Oil and Gas Development: Housing Demand Analysis

- Study limitations
  - Short time frame (Sept.-Dec. 2010)
  - Dynamic situation
  - Workforce Needs Study late
  - Population forecasts assume all cities can absorb their proportionate population potential
  - Study does not include current or future temporary and permanent population increases from
    - Infrastructure construction projects
    - Oil/gas construction projects
    - Development of other industries
    - Development of other mineral formations

# North Dakota Communities Acutely Impacted by Oil and Gas Development: Housing Demand Analysis

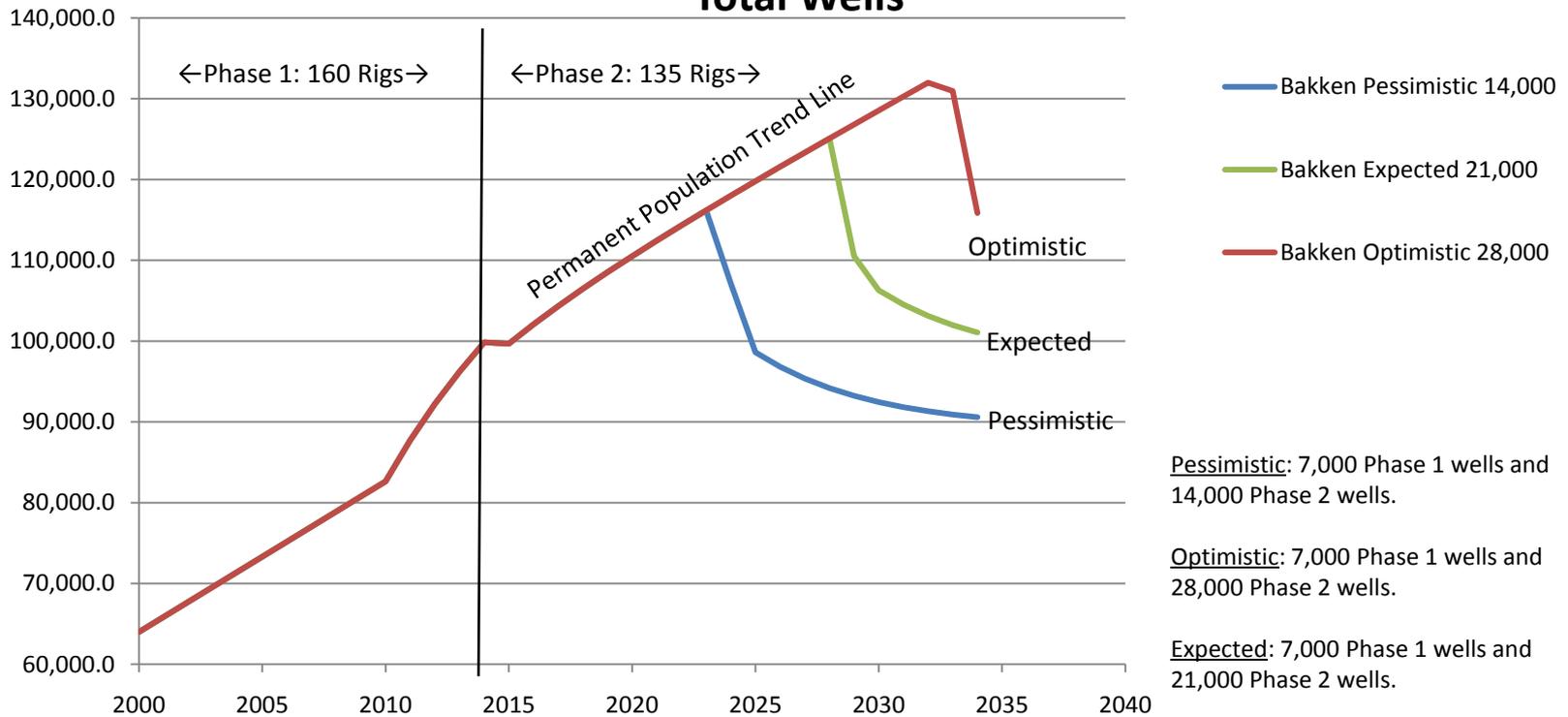


# North Dakota Communities Acutely Impacted by Oil and Gas Development: Housing Demand Analysis

- Bakken/Three Forks Population Forecast Based on Total Wells
  - Phase One: 7,000 wells completed 2014
  - Phase Two: Three scenarios
    - 14,000 pattern wells completed 2024-2025 (21,000 total wells)
    - 21,000 pattern wells completed 2029-2030 (28,000 total wells)
    - 28,000 pattern wells completed 2033-2034 (35,000 total wells)
  - Production
  - Permanent population includes permanent drilling-related and production-related primary, secondary, and induced workers with households
  - Transient population includes temporary drilling-related primary, secondary, and induced populations; does not include transient construction-related impacts

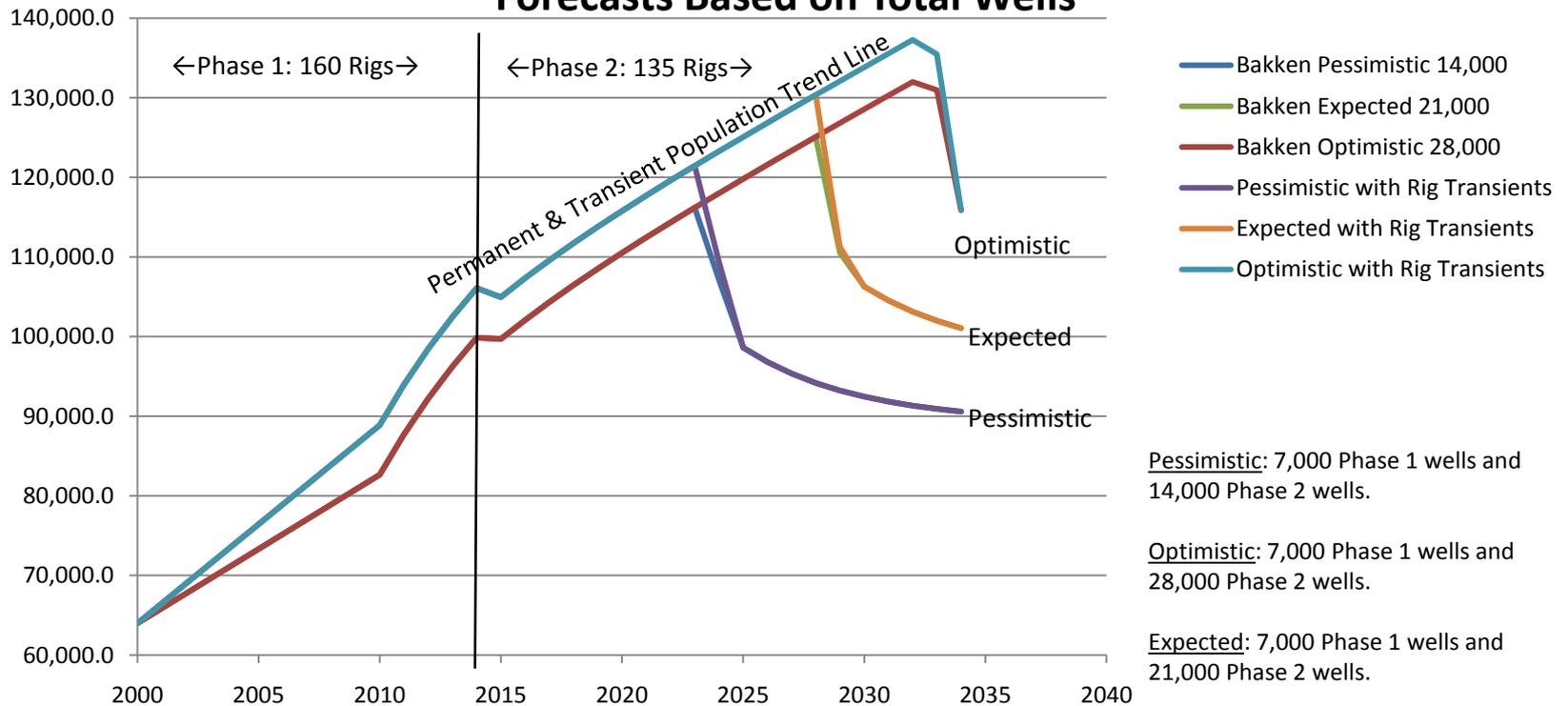
# North Dakota Communities Acutely Impacted by Oil and Gas Development: Housing Demand Analysis

## Bakken / Three Forks Permanent Population Forecasts Based on Total Wells



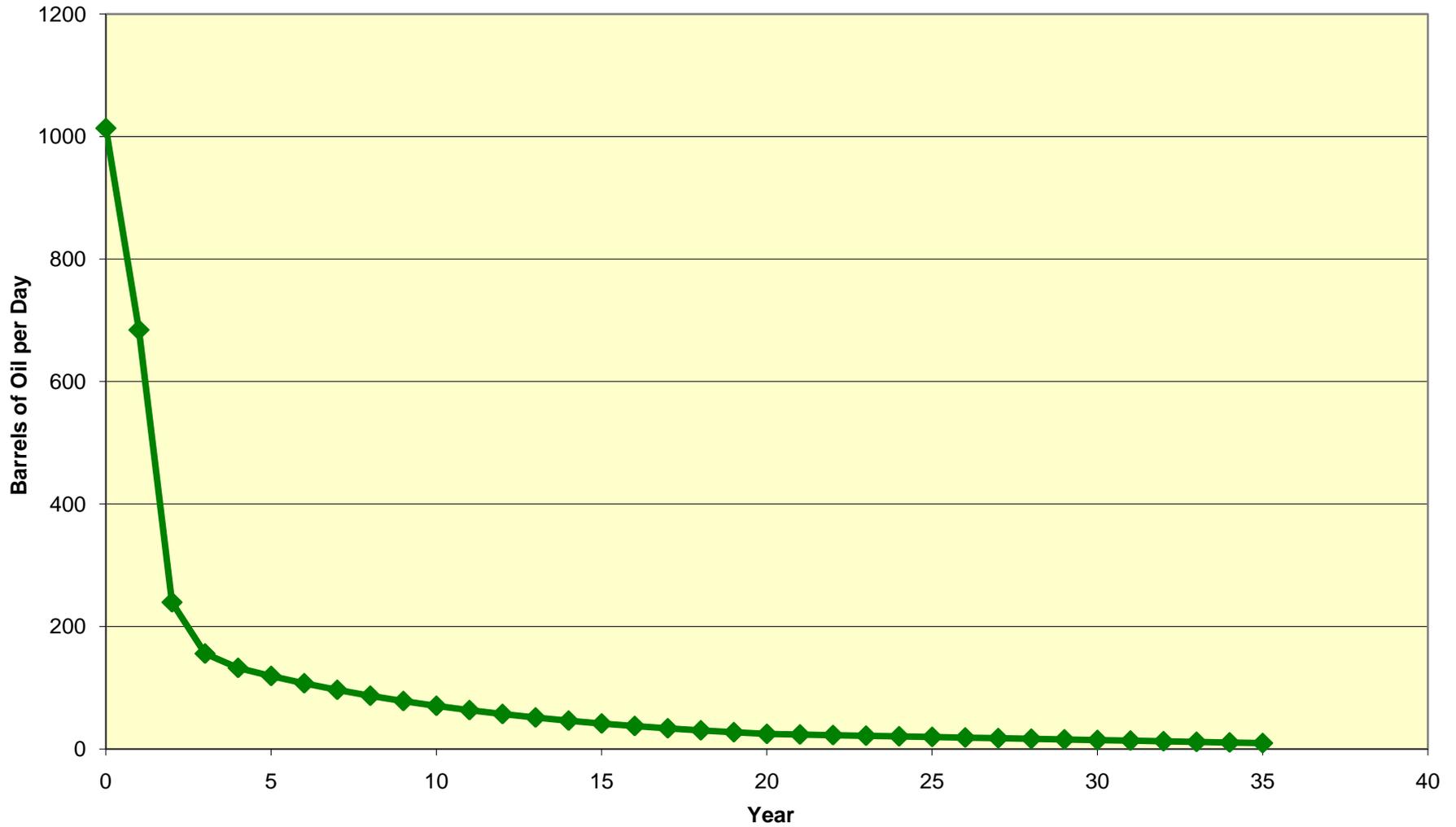
# North Dakota Communities Acutely Impacted by Oil and Gas Development: Housing Demand Analysis

## Bakken / Three Forks Permanent and Transient Population Forecasts Based on Total Wells



# Typical Bakken Well Production

Source: Lynn Helms, ND Oil and Gas Division

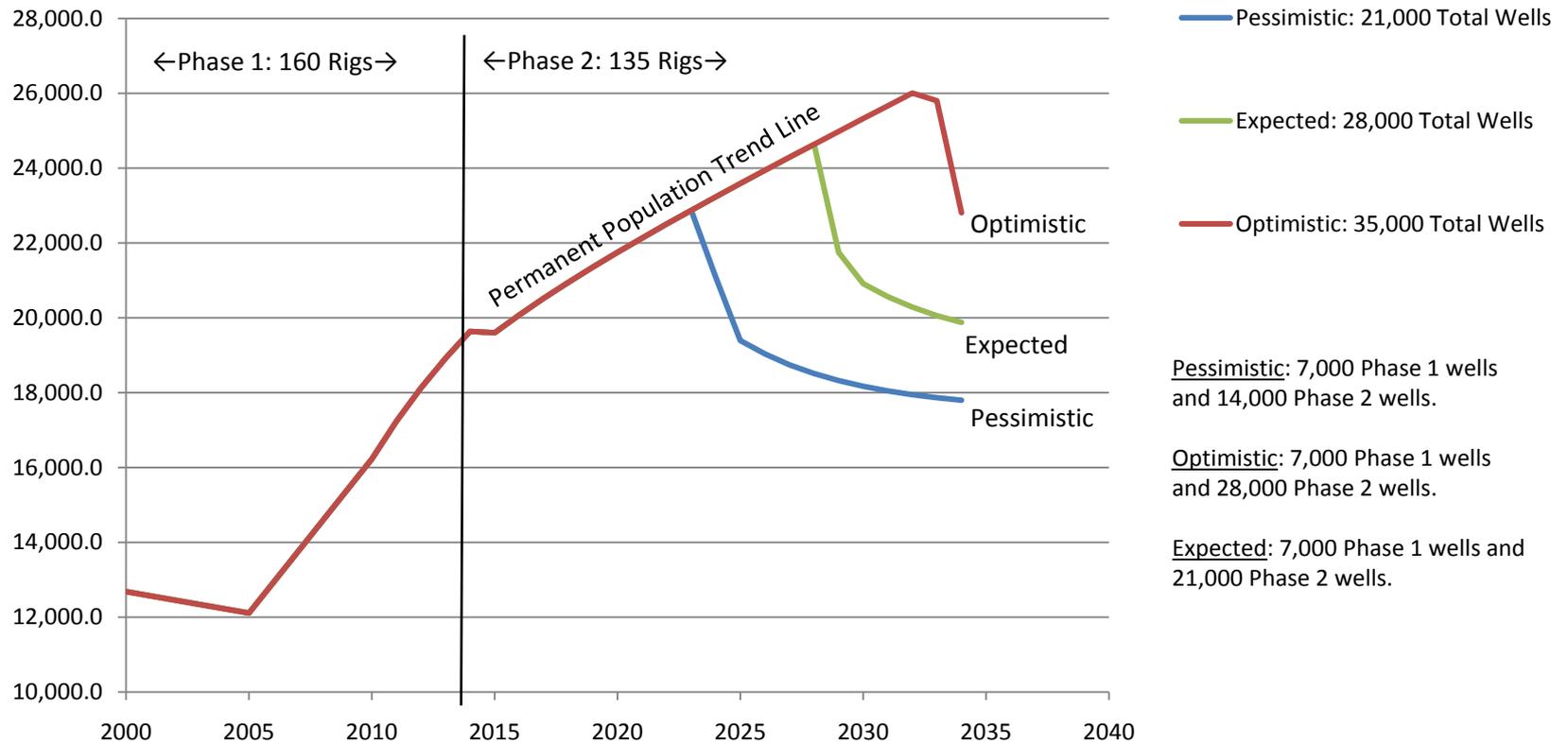


**North Dakota Communities Acutely Impacted  
by Oil and Gas Development:  
Housing Demand Analysis**

- **City Population Potential Based on Rigs and Wells**
  - Williston
    - Allocation based on ND Bakken/Three Forks footprint population potential

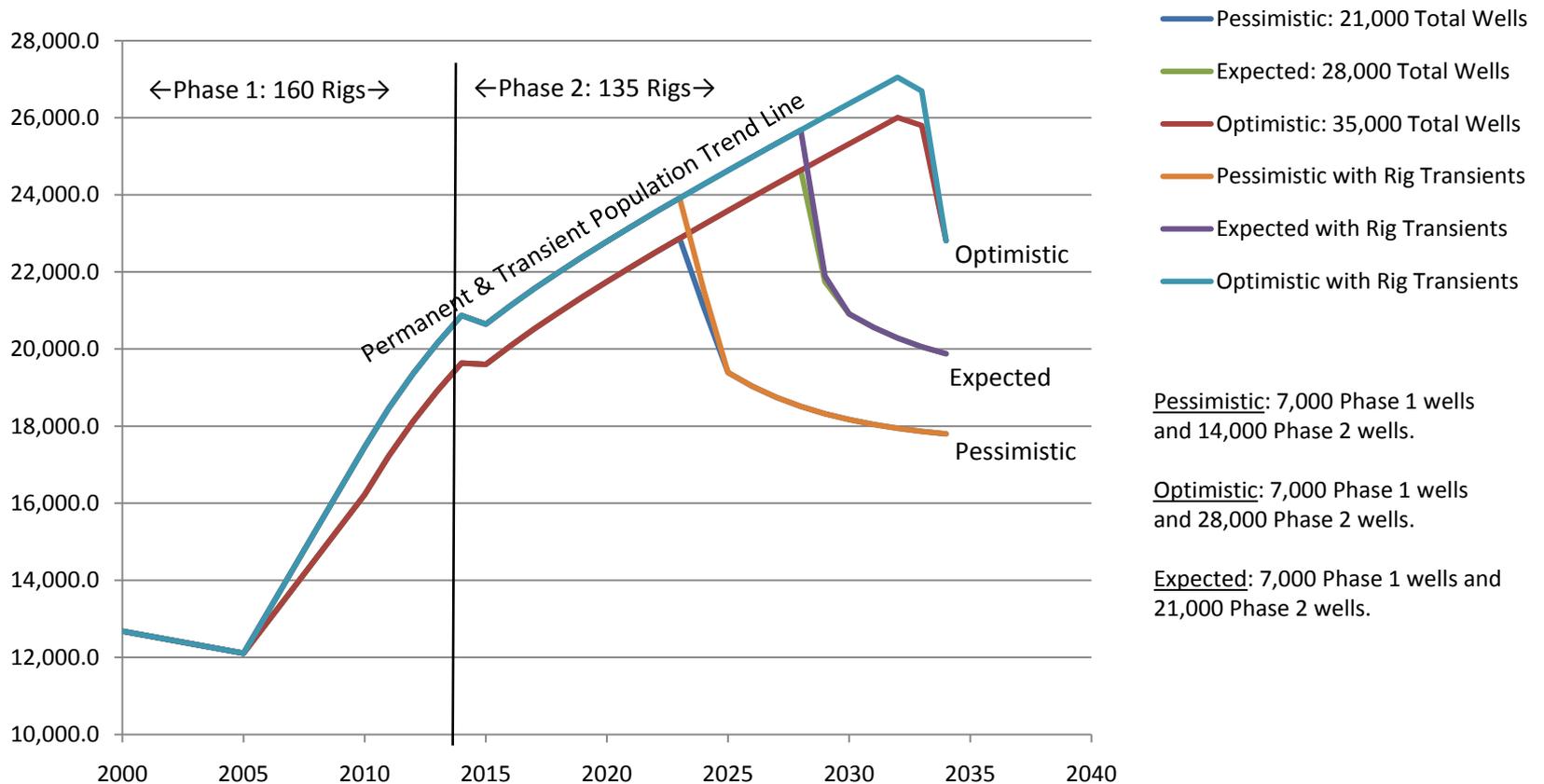
# North Dakota Communities Acutely Impacted by Oil and Gas Development: Housing Demand Analysis

## Williston Population Permanent Potential Based on Total Wells



# North Dakota Communities Acutely Impacted by Oil and Gas Development: Housing Demand Analysis

## Williston Population Permanent and Transient Potential Based on Total Wells



**North Dakota Communities Acutely Impacted  
by Oil and Gas Development:  
Housing Demand Analysis**

- Williston permanent population proportion based on...
  - Rig count of 160 through Phase One
  - Rig count of 135 through Phase Two
  - Phase Two 21,000 expected wells
  - Production recognizes rapid decline of total fluids per well

**North Dakota Communities Acutely Impacted  
by Oil and Gas Development:  
Housing Demand Analysis**

- **Housing Projections by Tenure by Type**
  - Tenure (rent/own) and housing types (single family, multi-family, and mobile home)
  - Assume tenure and type will normalize to pre-Bakken/Three Forks percentages

# North Dakota Communities Acutely Impacted by Oil and Gas Development: Housing Demand Analysis

Williston Housing Projections By Tenure By Type					
	2010	2015	2020	2025	2030
Population:	16223	19601	21747	23588	20908
Single Family Units	4357	5513	6343	7112	6423
SF Owned	3576	4524	5206	5837	5271
SF Rented	781	988	1137	1275	1152
Multi Family Units	2107	2581	2877	3128	2740
MF Owned	110	135	151	164	144
MF Rented	1997	2445	2726	2964	2597
Mobile Home Units	923	983	930	829	567
MH Owned	810	862	816	728	497
MH Rented	113	121	114	102	70
Total Units	7387	9076	10149	11069	9730
% SF Units	58.98%	60.74%	62.50%	64.25%	66.01%
% MF Units	28.52%	28.43%	28.34%	28.25%	28.16%
% MH Units	12.49%	10.83%	9.16%	7.49%	5.82%

Forecasted permanent population based on 21,000 Phase Two wells

# North Dakota Communities Acutely Impacted by Oil and Gas Development: Housing Demand Analysis

- Population by Age Cohorts
  - Aged existing population cohorts
  - Added new comers
    - 75 percent 0-39 years
    - 25 percent 40 years and older
  - Applied ND birth and death rates

# North Dakota Communities Acutely Impacted by Oil and Gas Development: Housing Demand Analysis

Williston Population By Age Cohorts						
	2000	2010	2015	2020	2025	2030
Total Population:	12512	16223	19601	21747	23588	20908
Age Cohorts						
0-5 years	764	840	1459	1571	1660	1293
5- 9 years	821	755	1049	1601	1733	1423
10-14 years	951	1507	1173	1208	1723	1497
15-19 years	1119	1695	1971	1436	1349	1533
20-24 years	716	1142	2005	2236	1658	1119
25-29 years	668	1241	1479	2194	2445	1317
30-34 years	629	913	1487	1673	2352	2113
35-39 years	860	1014	1186	1637	1826	2088
40-44 years	1070	629	1180	1337	1760	1574
45-49 years	1038	860	729	1218	1391	1616
50-54 years	699	1070	983	795	1248	1265
55-59 years	558	1038	1164	1040	832	1138
60-64 years	515	699	1091	1210	1079	716
65-69 years	426	558	703	1046	1163	895
70-74 years	488	515	570	683	993	985
75-79 years	457	426	455	484	570	754
80-84 years	376	488	391	389	406	428
85-89 years	243	457	284	214	208	201
90 years and older	114	376	262	158	116	103
% Error	0%	0%	0.10%	1.76%	3.92%	5.50%
Median Age Cohort:	35-39 years	35-39 years	30-34 years	30-34 years	30-34 years	35-39 years

Forecasted permanent population based on 21,000 Phase Two wells

**North Dakota Communities Acutely Impacted  
by Oil and Gas Development:  
Housing Demand Analysis**

- Households by Age
  - Age cohorts of householders
  - Allocated across rent/own

# North Dakota Communities Acutely Impacted by Oil and Gas Development: Housing Demand Analysis

Williston Households By Age					
	2010	2015	2020	2025	2030
Total Population:	16223	19601	21747	23588	20908
All Households					
15-39 years	3381	4628	5247	5496	4454
40-64 years	2419	2930	3202	3601	3440
65 years and older	1588	1517	1701	1973	1835
Total All Household Units	7388	9075	10150	11070	9729
Owner Households					
15-39 years	2058	2816	3190	3341	2706
40-64 years	1472	1783	1947	2189	2090
65 years and older	966	923	1034	1199	1115
Total Owner Household Units	4496	5522	6171	6729	5911
Renter Households					
15-39 years	1323	1813	2056	2155	1748
40-64 years	947	1148	1255	1412	1350
65 years and older	621	594	666	774	720
Total Renter Household Units	2891	3555	3977	4341	3818

Forecasted permanent population based on 21,000 Phase Two wells

**North Dakota Communities Acutely Impacted  
by Oil and Gas Development:  
Housing Demand Analysis**

- **Household Income by Percent**
  - Began with current county-level median incomes and poverty rates
  - Assumed median incomes and poverty threshold rise with Consumer Price Index (CPI)
  - Assumed poverty will fall to Mercer Co. levels

# North Dakota Communities Acutely Impacted by Oil and Gas Development: Housing Demand Analysis

Williston Household Income by Percent						
	2000	2010	2015	2020	2025	2030
Total Population:	12512	16223	19601	21747	23588	20908
Indexed Poverty Level:	\$12,938	\$14,716	\$15,620	\$16,580	\$17,599	\$18,681
Indexed Median:	\$29,962	\$55,000	\$58,380	\$61,968	\$65,776	\$69,819
Below Poverty	18.55%	9.90%	9.23%	8.55%	7.87%	7.20%
Poverty to \$19,999	14%	6.74%	5.58%	4.36%	3.06%	1.68%
\$20,000-\$24,999	10.22%	6.83%	6.98%	7.13%	7.29%	7.46%
\$25,000-\$29,999	7.40%	4.95%	5.05%	5.17%	5.28%	5.41%
\$30,000-\$34,999	7.46%	4.98%	5.09%	5.21%	5.33%	5.45%
\$35,000-\$39,999	7.40%	4.95%	5.05%	5.17%	5.28%	5.41%
\$40,000-\$44,999	5.53%	3.70%	3.78%	3.86%	3.95%	4.04%
\$45,000-\$49,999	5.06%	3.38%	3.46%	3.53%	3.61%	3.70%
\$50,000-\$54,999	6.86%	4.58%	4.68%	4.79%	4.89%	5.01%
\$55,000-\$74,999	7.57%	21.49%	21.96%	22.45%	22.96%	23.49%
\$75,000-\$99,999	5.44%	15.43%	15.77%	16.12%	16.49%	16.87%
\$100,000-\$124,999	1.98%	5.63%	5.75%	5.88%	6.01%	6.15%
\$125,000-\$149,999	1.00%	2.84%	2.90%	2.97%	3.03%	3.10%
\$150,000-\$199,999	0.60%	1.71%	1.75%	1.79%	1.83%	1.87%
\$200,000 or more	1.02%	2.89%	2.96%	3.02%	3.09%	3.16%
Total %	100%	100%	100%	100%	100%	100%

Forecasted permanent population based on 21,000 Phase Two wells

**North Dakota Communities Acutely Impacted  
by Oil and Gas Development:  
Housing Demand Analysis**

- Household Income by Number of Households
  - Applied percentages of household income to number of household to determine number of households at particular income categories

# North Dakota Communities Acutely Impacted by Oil and Gas Development: Housing Demand Analysis

Williston Household Income by Number of Households					
	2010	2015	2020	2025	2030
Population:	16223	19601	21747	23588	20908
Below Poverty	731	837	868	872	700
Poverty to \$19,999	498	507	443	339	164
\$20,000-\$24,999	504	633	724	807	726
\$25,000-\$29,999	365	459	524	585	526
\$30,000-\$34,999	368	462	529	589	530
\$35,000-\$39,999	365	459	524	585	526
\$40,000-\$44,999	273	343	392	437	393
\$45,000-\$49,999	250	314	359	400	360
\$50,000-\$54,999	338	425	486	542	487
\$55,000-\$74,999	1588	1993	2279	2542	2285
\$75,000-\$99,999	1140	1431	1637	1825	1641
\$100,000-\$124,999	416	522	597	666	598
\$125,000-\$149,999	210	263	301	336	302
\$150,000-\$199,999	127	159	182	203	182
\$200,000 or more	214	268	307	342	308
Total Households:	7388	9075	10150	11070	9729

Forecasted permanent population based on 21,000 Phase Two wells

**North Dakota Communities Acutely Impacted  
by Oil and Gas Development:  
Housing Demand Analysis**

- **Households by Affordable Rent/Mortgages**
  - Number of households in each income category and affordable rent/mortgage
  - Affordable rent 30% of income; affordable mortgage assumed to be same

# North Dakota Communities Acutely Impacted by Oil and Gas Development: Housing Demand Analysis

Williston Households by Affordable Rent/Mortgage					
	2010	2015	2020	2025	2030
Population:	16223	19601	21747	23588	20908
Affordable Rent/Mortgage (30%):					
Less than \$500	1229	1344	1310	1211	864
\$500 to \$625	504	633	724	807	726
\$625 to \$750	365	459	524	585	526
\$750 to \$875	368	462	529	589	530
\$875 to \$1000	365	459	524	585	526
\$1000 to \$1125	273	343	392	437	393
\$1125 to \$1250	250	314	359	400	360
\$1250 to \$1375	338	425	486	542	487
\$1375 to \$1875	1588	1993	2279	2542	2285
\$1875 to \$2500	1140	1431	1637	1825	1641
\$2500 to \$3125	416	522	597	666	598
\$3125 to \$3750	210	263	301	336	302
\$3750 to \$5000	127	159	182	203	182
Greater than \$5000	214	268	307	342	308
Total Households:	7388	9075	10150	11070	9729

Forecasted permanent population based on 21,000 Phase Two wells

**North Dakota Communities Acutely Impacted  
by Oil and Gas Development:  
Housing Demand Analysis**

- **Model Estimating New Construction Rental Rates**
  - Rental rates necessary to pay back eight-plex built using 2010 constructions costs
  - At five, ten, 15, 20 and 25 years

# North Dakota Communities Acutely Impacted by Oil and Gas Development: Housing Demand Analysis

## Appendix A: Model Estimating New Construction Rental Rates (Example of an 8-plex)

Structure		Lot & Site Development	
			Enter 'land' value:
		Land:	\$40,000.00
	Enter first 2:	Grading, graveling, paving, water, sewer, storm sewer, curb, sidewalks, landscaping, and design fees (2)	
Square Feet Per Unit:	750		
Number of Units:	8		
Construction per Sq Ft: (1,4)	\$127.50		\$80,000.00
Contractor Fees (Included):	\$0.00		
Architect Fees (7%) (1,4):	\$0.00	Enter Per Unit Upgrades:	
Total Costs per Sq Ft:	\$127.50	\$10,000.00	
Grand Total Construction:	\$765,000.00	Total Lot & Improvements:	\$120,000.00

Enter APR for building loan: (4d)

6.50%

### Per Unit Monthly (4)

Monthly amortization per unit (4d)	Maint Fees (4a)	Mgmt Fees (4b)	Utility Costs (4c)	Taxes (6,6a,6b)	Insurance (4f,5)	Grand Total Per Unit *
5 year payback	(2,164.51)	216.45	151.52	67.23	126.55	31.67
10 year payback	(1,256.12)	125.61	87.93	67.23	126.55	31.67
15 year payback	(963.66)	96.37	67.46	67.23	126.55	31.67
20 year payback	(824.79)	82.48	57.74	67.23	126.55	31.67
25 year payback	(746.95)	74.69	52.29	67.23	126.55	31.67
						<b>\$1,099.37</b>

\* Per unit rental rates assume a simple break even scenario. Any developer equity position is assumed to have an ROI equal to the APR of the loan.

#### Sources:

- (1) Wayne Whitty - 852-4850: Construction fees \$180 per sq ft with 7% architect fees
- (2) Ryan Ackerman - 852-6363
- (3) Lon Drevecky - 837-8737 - Left message on 9/27/2010
- (4) Bruce Walker - 852-0136: Construction costs (including contractor and architect fees) are about \$127.50 per sq ft.
- (4a) Approximate Maintenance Fees: 10% of rents collected
- (4b) Approximate Management Fees: 7% of rents collected
- (4c) Approximate Fuel Costs: 9% of rents collected
- (4d) Terms are running about 6.5% for up to 25 years. Lenders do not go beyond 25 years.
- (4e) Taxes are running 1.7% to 1.8% of assessed value
- (4f) Examples: \$1857 for a 5plex (\$371 per unit per year); \$14000 for a 36plex (\$389 per unit per year)
- (5) Kim Albert: Insurance is age-dependent (newer=cheaper)
- (6) Kevin Ternes - 857-4160, Minot City Assessor: Fair Market Value runs approximately 85% to 90% of total new construction and development costs
- (6a) Assessed value is allotted a 'leeway' of 5% of market value.
- (6b) Taxes are 1.7% of assessed value.

**North Dakota Communities Acutely Impacted  
by Oil and Gas Development:  
Housing Demand Analysis**

- Household by Size
  - Rental and owner households allocated based on number living in household

# North Dakota Communities Acutely Impacted by Oil and Gas Development: Housing Demand Analysis

Williston Households by Size					
	2010	2015	2020	2025	2030
Population:	16223	19601	21747	23588	20908
Total Owned Units	4496	5522	6172	6729	5912
1-person household	1325	1628	1819	1983	1743
2-person household	1880	2309	2581	2814	2472
3-person household	738	906	1013	1105	970
4-person household	339	416	465	507	445
5-person household	155	190	212	231	203
6-person household	41	50	56	61	54
7-person household	18	22	25	27	24
Total Rented Units	2891	3555	3977	4341	3818
1-person household	1436	1765	1975	2156	1896
2-person household	761	936	1047	1143	1005
3-person household	359	441	493	538	473
4-person household	206	253	283	309	272
5-person household	87	107	120	131	115
6-person household	32	39	44	48	42
7-person household	11	13	15	16	14
% Error:	0.20%	-0.55%	-0.89%	-1.14%	-0.76%

Forecasted permanent population based on 21,000 Phase Two wells

# North Dakota Communities Acutely Impacted by Oil and Gas Development: Housing Demand Analysis

- Caveats

- Monitor oil and gas developments to understand unfolding scenarios
- Oil and gas resources are finite. Production in the Bakken/Three Forks will end
- In northwest ND population due to oil and gas will not increase forever; there will be significant fall-offs
- New technology will affect all factors of the oil/gas industry including labor
- Rig numbers are fluid and influenced by
  - Economics
  - Politics/regulations

# North Dakota Communities Acutely Impacted by Oil and Gas Development: Housing Demand Analysis

- Press inquiries should be directed to
  - Mr. Mike Anderson, Director, North Dakota Housing Finance Agency ,  
Bismarck, ND, 701-328-8080, [maanders@ndhfa.org](mailto:maanders@ndhfa.org)
- Technical inquiries should be directed to
  - James Ondracek, Ph.D., [ondracek@srt.com](mailto:ondracek@srt.com)

Appendix B: Interim Report from October 18, 2010



North Dakota Communities Acutely Impacted by Oil and Gas Development

City of Williston

Housing Interim Report: Cumulative Data and Snapshot at the end of 2010

Ondracek, Witwer, and Bertsch

October 18, 2010

Contact Information:  
James Ondracek, PhD  
701-838-2645  
[ondracek@srt.com](mailto:ondracek@srt.com)

## Total Population in 2000 and 2010

Type	2000	Chg from 2000-2010 (2)	2010
<b>Single Family units</b>	3921	+420	4341
<b>Avg. Household Size S.F.</b>	2.4029749	(1)	2.1104388
<b>Multi Family units</b>	1673	+401	2074
<b>Avg. Household Size M.F.</b>	2.0175046	(1)	1.6572019
<b>Mobile Home units</b>	346	+577	923
<b>Avg. Household Size M.H.</b>	2.4313754	(1)	1.9208036
Total population in housing	12244.8		14970.493
<b>Group Quarters</b>	<b>436</b>		<b>436</b>
<b>Totals</b>	<b>12680.8</b>		<b>15406.493</b>
Cumulative % change from 2010			21.49%

(1) The average size of households have declined due to such factors as aging, child maturation, and other household considerations.

(2) This represents the number of additional units since 2000 (e.g. building permits, HUD data, and observations/interviews).

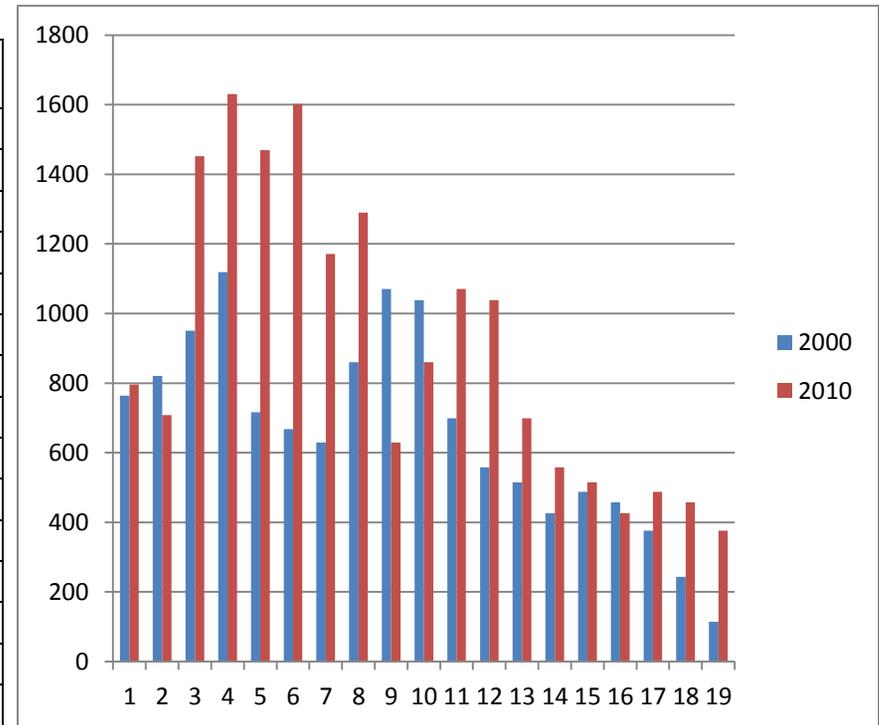
<b>Additional Population Adjustments:</b>			
"Double Up" @ 1% (National Avg)			154.06493
Informal RV Parking @ 1% Single Family Homes (units)			43.41
Informal RV Parking population			82.311789
RV Parks in City (2010 only).			189.61481
Motel Dwellers (2010 only).			1300.7576
Skid Shacks (2010 only).			299.5914
Total population:			17432.834
Cumulative % change from 2010			37.47%

<b>Housing Units by Age: 2000 to 2010</b>			
		<b>2000</b>	<b>End of 2010</b>
<b>Median Year Built: All Owned</b>		1961	1979.39389
<b>Median Year Built: All Rentals</b>		1973	1978.78779
		<b>2000</b>	<b>End of 2010</b>
<b>Single Family % Owned</b>		82.07%	82.07%
<b>Single Family % Rented</b>		17.93%	17.93%
<b>Multi Family % Owned</b>		5.24%	5.24%
<b>Multi Family % Rented</b>		94.76%	94.76%
<b>Mobile Home % Owned</b>		87.73%	87.73%
<b>Mobile Home % Rented</b>		12.27%	12.27%
<b>Total Single Family Units</b>		3921	4341
	<b># owned</b>	3217.9	3562.63001
	<b># rented</b>	703.06	778.369989
	<b>Avg Age S.F. Owned</b>	39	35.3234278
	<b>Avg Age S.F. Rented</b>	27	24.4844506
	<b>Avg Age all S.F.</b>	36.848	33.3799275
<b>Total Multi Family Units</b>		1673	2074
	<b># owned</b>	87.64	108.645817
	<b># rented</b>	1585.4	1965.35418
	<b>Avg Age M.F. Owned</b>	39	31.6528447
	<b>Avg Age M.F. Rented</b>	27	21.972999
	<b>Avg Age all M.F.</b>	27.629	22.4800746
<b>Total Mobile Homes</b>		346	923

	<b># owned</b>	303.55	809.748466
	<b># rented</b>	42.454	113.251534
	<b>Avg Age M.H. Owned</b>	39	15.2448537
	<b>Avg Age M.H. Rented</b>	27	10.7464789
	<b>Avg Age all M.H.</b>	37.528	14.6929059

### Age Cohorts at 2000 and 2010

Category	Age Cohorts	2000	% of total	2010 Shifted	2010 Adj
1	0-5 years	764	6.11%	243	796
2	5- 9 years	821	6.56%	114	708
3	10-14 years	951	7.60%	764	1452
4	15-19 years	1119	8.94%	821	1630
5	20-24 years	716	5.72%	951	1469
6	25-29 years	668	5.34%	1119	1602
7	30-34 years	629	5.03%	716	1171
8	35-39 years	860	6.87%	668	1290
9	40-44 years	1070	8.55%	629	629
10	45-49 years	1038	8.30%	860	860
11	50-54 years	699	5.59%	1070	1070
12	55-59 years	558	4.46%	1038	1038
13	60-64 years	515	4.12%	699	699
14	65-69 years	426	3.40%	558	558
15	70-74 years	488	3.90%	515	515
16	75-79 years	457	3.65%	426	426
17	80-84 years	376	3.01%	488	488
18	85-89 years	243	1.94%	457	457
19	90 years and older	114	0.91%	376	376
		12512		12512	17234



Error: 1.14%

**By Tenure By Type at 2010**

Error = 1.48%

Total		17432.83401		
<b>Single Family Dwellers</b>		<b>11033.39998</b>	Population	Units
	SF Owners		9055.038449	3562.630011
	SF Renters		1978.361536	778.3699892
<b>Multi Family Dwellers</b>		<b>3209.102039</b>		
	MF Owners		168.107769	108.645817
	MF Renters		3040.99427	1965.354183
<b>Mobile Home Dwellers</b>		<b>985.7529043</b>		
	MH Owners		864.8016277	809.7484663
	MH Renters		120.9512766	113.2515337
<b>Group Quarters Dwellers</b>		<b>436</b>	Renters	
<b>Double Up Dwellers</b>		<b>154.0649348</b>	Renters	
<b>1% Informal RV Dwellers</b>		<b>82.31178892</b>	Renters	
<b>RV Dwellers</b>		<b>189.6148098</b>	Renters	
<b>Motel Dwellers</b>		<b>1300.757595</b>	Renters	
<b>Skid Shack Dwellers</b>		<b>299.5913994</b>	Renters	
<b>Total Renters:</b>		<b>7602.64761</b>	42.98%	
<b>Total Owners:</b>		<b>10087.94785</b>	57.02%	
<b>Total Owned Units</b>		4481.024294		
<b>Total Rented SF MF &amp; MH Units</b>		2856.975706		
<b>Total Rented Motel, Skid Shacks, RV Spaces</b>		944		

### Householder by Age in 2000 and 2010

<b>All Householder by Age</b>	<b>2000</b>	<b>% of Total</b>	<b>2010</b>	<b>% of Total</b>
15-24 years	400	7.61%	425	5.82%
25-34 years	724	13.78%	1122	15.37%
35-44 years	1108	21.08%	1797	24.62%
45-54 years	1041	19.81%	1108	15.18%
55-64 years	629	11.97%	1041	14.26%
65-74 years	611	11.63%	629	8.62%
75-84 years	566	10.77%	611	8.37%
85 years and older	176	3.35%	566	7.75%
		This method	7299	
		HUM method	7338	
		Error	0.53%	
<b>Owner Householder by Age</b>	<b>2000</b>	<b>% of Total</b>	<b>2010</b>	<b>% of Total</b>
15-24 years	46	1.37%	49	0.67%
25-34 years	312	9.29%	484	6.63%
35-44 years	756	22.50%	1226	16.80%
45-54 years	791	23.54%	842	11.54%
55-64 years	468	13.93%	775	10.62%
65-74 years	459	13.66%	473	6.48%
75-84 years	428	12.74%	462	6.33%
85 years and older	100	2.98%	322	4.41%
<b>Renter Householder by Age</b>	<b>2000</b>	<b>% of Total</b>	<b>2010</b>	<b>% of Total</b>
15-24 years	354	18.68%	376	5.15%
25-34 years	412	21.74%	638	8.74%
35-44 years	352	18.58%	571	7.82%
45-54 years	250	13.19%	266	3.64%

55-64 years	161	8.50%	266	3.64%
65-74 years	152	8.02%	156	2.14%
75-84 years	138	7.28%	149	2.04%
85 years and older	76	4.01%	244	3.34%

### Household Income Levels by Percentage

	2000	Cum 2000	2010	Cum 2010
<b>Below Poverty</b>	18.55%	18.55%	9.90%	9.90%
<b>Poverty to \$19,999</b>	13.88%	32.43%	6.74%	16.64%
<b>\$20,000-\$24,999</b>	10.22%	42.65%	6.83%	23.46%
<b>\$25,000-\$29,999</b>	7.40%	50.05%	4.95%	28.41%
<b>\$30,000-\$34,999</b>	7.46%	57.52%	4.98%	33.39%
<b>\$35,000-\$39,999</b>	7.40%	64.92%	4.95%	38.34%
<b>\$40,000-\$44,999</b>	5.53%	70.45%	3.70%	42.04%
<b>\$45,000-\$49,999</b>	5.06%	75.52%	3.38%	45.42%
<b>\$50,000-\$59,999</b>	6.86%	82.37%	4.58%	50.00%
<b>\$60,000-\$74,999</b>	7.57%	89.95%	21.49%	71.49%
<b>\$75,000-\$99,999</b>	5.44%	95.39%	15.43%	86.92%
<b>\$100,000-\$124,999</b>	1.98%	97.37%	5.63%	92.55%
<b>\$125,000-\$149,999</b>	1.00%	98.37%	2.84%	95.39%
<b>\$150,000-\$199,999</b>	0.60%	98.98%	1.71%	97.11%
<b>\$200,000 or more</b>	1.02%	100.00%	2.89%	100.00%

## Households by Size

	2000		2010	
Owner Household Size	Units	Percent	Units	Percent
Total owner occupied housing units	3360	100.00%	4481.024294	100.00%
1-person household	853	25.39%	1363.150883	30.42%
2-person household	1210	36.01%	1933.660689	43.15%
3-person household	475	14.14%	433.6939421	9.68%
4-person household	504	15.00%	460.1720986	10.27%
5-person household	230	6.85%	209.999172	4.69%
6-person household	61	1.82%	55.69543257	1.24%
7-person household	27	0.80%	24.65207671	0.55%
	2000		2010	
Renter Household Size	Units	Percent	Units	Percent
Total renter occupied housing units	1895	100.00%	2856.975706	100.00%
1-person household	941	49.66%	1645.969589	57.61%
2-person household	499	26.33%	872.8361581	30.55%
3-person household	235	12.40%	174.6592096	6.11%
4-person household	135	7.12%	100.3361417	3.51%
5-person household	57	3.01%	42.36414872	1.48%
6-person household	21	1.11%	15.60784427	0.55%
7-person household	7	0.37%	5.202614755	0.18%

**Building Permits by Year: 2000 through 2010**

	HUD (1)	Corrected as of 10/1/2010 (2)
2010 single family		102
2010 multiple unit		194
2010 mobile home		369
2009 single family	27	27
2009 multiple unit	128	128
2009 mobile home		11
2008 single family	88	88
2008 multiple unit	16	40
2008 mobile home		49
2007 single family	43	43
2007 multiple unit	72	72
2007 mobile home		72
2006 single family	64	64
2006 multiple unit	0	0
2006 mobile home		30
2005 single family	26	30
2005 multiple unit	4	0
2005 mobile home		25
2004 single family	18	18
2004 multiple unit	0	0
2004 mobile home		14
2003 single family	20	20
2003 multiple unit	0	0
2003 mobile home		7
2002 single family	13	16
2002 multiple unit	0	0

2002 mobile home		0
2001 single family	14	14
2001 multiple unit	0	0
2001 mobile home		0
2000 single family	17	14
2000 multiple unit	0	0
2000 mobile home		0
total 2000-2010 all units	550	1398
total 2000-2010 single family		420
total 2000-2010 multiple unit		401
total 2000-2010 mobile home		577

(1) <http://socds.huduser.org/permits/index.html>

(2) Building permit records, observations and interviews

## 2010 Rents

### City of Williston Market-Rent Levels

Condition	Single family home	Multi-family apartment (One- bedroom unit)	Multi-family apartment (Two bedroom unit)	Multi-family apartment (Three bedroom unit)	Multi-family apartment (Four bedroom unit)	Mobile home	Mobile home court rental	RV court rental
Existing (facility/building) new tenant	\$375-\$3,700/mo.	\$325-\$725/mo.	\$400-\$990/mo.	\$990/mo.	---	\$750-\$1,750/mo.	\$160-\$300/mo.	\$450-\$600/mo.
New (facility/building constructed 2007 or later)	---	\$800/mo.	\$1,100-\$1,300/mo.	\$1,395/mo.	\$1,495/mo.	---	---	---

Source: Ondracek, Witwer, & Bertsch

## Vacancy Rates

All rental properties are fully absorbed at 2010. See Appendix A.

## Discussions of Developments and Developable Land

### City of Williston: Developments and Developable Land

	Number of lots	Type	Owner/identifier	Description	Comments
Commercial					
			Various owners	Potential rezoning	Close-in Highway 2 conversion from industrial to commercial
Industrial					
					Williston is out of industrial land; Halliburton bought last city-owned property
					Williston is considering developing industrial land near Marley Crossing
					Discussing moving airport to the west and opening the airport land to development
Residential lots					
City of Williston	0				City of Williston has sold all city-owned lots
Creekside Ridge	4 unfinished phases	Single family and bay homes	Palisade Capital Management LLC Kyle Hexum 208-639-1715 208-880-9357		
Granite Peak	163 housing lots/units (single and twin houses); 100 apartment units	Single family, twin, and apartment	Terry Metzler	Granite Peaks has 5 home up and has completed 8 basements	Granite Peaks prefers to develop infrastructure and sell lots to builders
Joan Hogan 1 <sup>st</sup> Addition	8				
Spring Creek Estates	10				Executive lots; intended for \$400,000+ homes
The Timbers	125 lots for single family; 5.5 acres for 100 apartments	Single family and apartment	Matt Miles		By Sept 1, 2010 had completed 6 homes and had 8 basements poured; wants to finish 30 units by winter
Various private owners	Approx. 50				Only about 50 undeveloped residential lots remain in Williston
Total residential lots	>250				
<b>Potential Developments</b>					
Granite Peaks has option on 280 acres to the west of its 40 acre development	At same density as 40 acre Granite Peaks development—1840 units; 700 apartments and 1140 single and twin houses		Terry Metzler		

Source: Shawn Wenko, City of Williston Workforce Development Coordinator

According to SRF Consulting Group, Inc.’s draft study dated July, 2010, City of Williston, North Dakota Study of Annexation Options and Implications, the City of Williston has approximately 360 acres inside its corporate limits that were unplatted and undeveloped but “some of that land is currently in the process of being platted and zoned.” Of these 360 acres 60 are affected by Sloulin Field International Airport’s zoning. According to the study Williston could grow by/annex at least 2,700 acres by 2020 and

5,300 acres by 2050. The City of Williston maintains a one mile extra-territorial area (ETA). SRF Consulting Group, Inc. advocates expanding the ETA to a full two miles.

### Property Values

#### Williams County Home Sales Excluding the City of Williston

Home sales	2010*	2009	2008	2007	2006	2005	2004	2003	2002	2001	2000
Number of sales	47	56	41	56	65	68	56	49	47	35	35
Average value	\$79,609	\$94,668	\$63,791	\$58,964	\$61,929	\$60,549	\$69,421	\$53,071	\$58,203	\$54,274	\$55,699
Total sales volume	\$3,741,600	\$5,301,395	\$2,615,450	\$3,302,000	\$4,025,390	\$4,117,331	\$3,887,586	\$2,600,460	\$2,735,540	\$1,899,588	\$1,949,450

Source: ND State Tax Office

\*2010 data is tabulated from the first two quarters of 2010

#### Williams County Lot Sales Excluding the City of Williston

Lot sales	2010*	2009	2008	2007	2006	2005	2004	2003	2002	2001	2000
Number of sales	35	26	29	26	28	23	11	18	20	22	13
Average value	\$18,969	\$22,698	\$12,922	\$10,998	\$9,979	\$7,189	\$7,351	\$7,089	\$5,893	\$7,634	\$4,996
Total sales volume	\$663,930	\$590,154	\$374,725	\$285,950	\$279,400	\$165,350	\$80,866	\$127,600	\$117,860	\$167,950	\$64,949

Source: ND State Tax Office

\*2010 data is tabulated from the first two quarters of 2010

#### Williams County Mobile Home Sales Excluding the City of Williston

Mobile home sales	2010*	2009	2008	2007	2006	2005	2004	2003	2002	2001	2000
Number of sales	29	41	33	27	17	23	7	6	25	14	22
Average value	\$27,960	\$16,791	\$13,948	\$14,119	\$8,318	\$8,987	\$4,957	\$9,483	\$7,820	\$10,009	\$1,447
Total sales volume	\$810,842	\$688,418	\$460,296	\$381,200	\$141,400	\$206,700	\$34,700	\$56,900	\$195,512	\$140,125	\$31,828

Source: ND State Tax Office

\*2010 data is tabulated from the first two quarters of 2010

#### City of Williston Home Sales

Home sales	Aug-2010	Jul-2010	2010*	2009	2008	2007	2006	2005	2004	2003	2002	2001	2000
Number of sales	19	18	151	176	161	166	180	179	185	182	146	175	153
Average value	\$147,961	\$190,083	\$131,605	\$119,798	\$99,531	\$85,348	\$71,384	\$66,324	\$61,776	\$57,406	\$59,926	\$55,734	\$54,959
Total sales volume	\$2,800,250	\$3,421,500	\$19,872,300	\$21,984,391	\$16,024,520	\$14,167,790	\$12,849,031	\$11,871,935	\$11,428,500	\$10,447,831	\$8,749,165	\$9,753,458	\$1,968,210

Source: ND State Tax Office

\*2010 data is tabulated from the first two quarters of 2010

### City of Williston Lot Sales

Lot sales	2010*	2009	2008	2007	2006	2005	2004	2003	2002	2001	2000
Number of sales	7	30	18	0	13	11	2	1	2	5	4
Average value	\$27,500	\$26,235	\$14,472	\$13,396	\$25,781	\$25,091	\$6,250	\$40,000	\$13,850	\$13,000	\$14,653
Total sales volume	\$192,500	\$787,057	\$260,500	\$133,961	\$33,350	\$276,000	\$12,500	\$40,000	\$27,700	\$65,000	\$58,613.

Source: ND State Tax Office

\*2010 data is tabulated from the first two quarters of 2010

### City of Williston Mobile Home Sales

Mobile home sales	2010*	2009	2008	2007	2006	2005	2004	2003	2002	2001	2000
Number of sales											
Average value											
Total sales volume											

Source: ND State Tax Office

\*2010 data is tabulated from the first two quarters of 2010

### City of Williston Residential Listings as of October 1, 2010

Number of listings	41
Average price	\$181,844
Median price	\$179,000
Max. price	\$500,000
Min. price	\$67,000
Total value	\$7,441,030

Source: Realtor.com

### Discussion of City of Williston Infrastructure

Awaiting Report

### City of Williston Utility Rates

Awaiting Report

# Appendix A

## Housing Particulars

### City of Williston Subsidized, Low-Income Tax Credit, Market-Rate, and Income Targeted/Moderate Income Apartments

City identifier and age	Contact	Units	Efficiency	1-bedroom	2-bedroom	3-bedroom	4-bedrooms	Garage	Current rent, waiting list, number of calls in last week	Number living in the building ; percent under 18	Percent permanent ; percent temporary	Renter (company or individual )	Notes	Comment	Type
<b>Subsidized</b>															
Brookeland Homes	Judy Herring, Executive Director Housing Authority of the City of Williston 701-572-2006 <a href="http://www.hud.gov">www.hud.gov</a>	34			24	7	3	0	30% AGI  Waiting time 9 months to 1 year			Individual	Turnover rate (1- 3%)		30% AGI  Family
Knollcrest	Judy Herring, Executive Director Housing Authority of the City of Williston 701-572-2006	20			16	4		0	30% AGI Waiting time 9 months to 1 year			Individual	Turnover rate (1- 3%)		30% AGI  Family
Norpark	Judy Herring, Executive Director Housing Authority of the City of Williston 701-572-2006	59  43 in row houses ; 16 in sep. Build.		12	23	18	6	0	30% AGI Waiting time 9 months to 1 year			Individual	Turnover rate (1- 3%)		30% AGI  Family
Prairie View I	Judy Herring, Executive Director Housing Authority of the City of Williston 701-572-2006	48	28	20				0	30% AGI Waiting time 9 months to 1 year			Individual	Turnover rate (1- 3%)		30% AGI  Elderly and disabled
Prairie View II	Judy Herring, Executive Director Housing Authority of the City of Williston 701-572-2006	30		28	2				30% AGI Waiting time 9 months to 1 year			Individual	Turnover rate (1- 3%)		30% AGI  Elderly and disabled

Valley Rental Williston Village 2310 & 2324 17th Ave West  1970s	Sherry Gooch 701-580-0443	48  2 build.		20	28			0	30% AGI; recently had two move- outs; 15 on waiting list but only 6 were still looking; get 50 calls per week— people are desperate as winter is coming and many are living in tents and campers	70/10- 15	Not all are permanent ; many have moved from other states	Individual		These two buildings will not likely be converted to market rents	30% AGI  Mixed buildings
Waters Edge Located on Reclamation Drive <a href="http://www.cdinet.us">www.cdinet.us</a>	Bill Truax, Sr. VP Finance, Community Development, Inc. 208-459-8522  866-925-7368 Managed by Somerset Pacific Management Co. (Idaho)	51							Minimum rents \$415 Maximum rent \$798; \$20 app. fee; tenants must meet income guidelines					Not called; data from Deann Long	Low Income Tax Credit Housing: 2,3 and 4 bedrooms ; opening Soon

West View/CAP 2416 & 2626 29 St W  1982; rehabbed in 2002	Deann Long 701-572-8191  Managed by Community Action Partnership www.willistoncap.org	16  2-8 plex (town house style)			16			0	30% AGI; Individuals pay utilities and are allowed a \$67 utility allowance that is subtracted from the gross rent; Max. rent is \$560 less \$67 utility allowance or \$493 max. and pay utilities; 4 openings; no effective waiting list; receive 30 calls per week	21/9	100%/0%	Individual	5/16 or 25% and are "workin g from the waiting list; the list isn't that long"		30% AGI  Low Income  USDA Rural Dev.  2 bedroom only 1- disability accessibl e unit
Missouri View Heights 514 Reclamation Drive 2002	Region 1 Client Services Deann Long 701- 572-8191	8		8				0	Full; tenants must meet the diagnosis and need of supportive services			Individual	Full; long- term tenants		30% AGI  <b>HUD 811 serves the chronic mentally ill</b>
<b>Market</b>															
Ace Property Mgmt	Gary Ingman 701-572-0044 701- 774-9492	4			4				\$725/mo.— 2 bed; rent includes water, sewer, garbage, and heat; don't keep list; 5-10 calls per week	8/2	100%/0%	Individual		Last vacancy ad. in the Shopper and rec'd 140 calls; next vacancy will place a sign on the shop	Market
Leroy Anseth  1975	Leroy Anseth 701-572-9663 701-770-8211	4			4			0	\$500/mo. to 3 long-time tenants; \$990/mo. to	5/0	75%/25%	Individual and company; one unit	Will raise the rent when	Had two other buildings sold one	Market

									Hess; rent includes all utilities			rented to Hess	long-term tenants leave	to 18 unit to Bratcher 701-774-1908, and one 24 unit to Marcil	
Bratcher Apartments 1980s	Lana Bratcher 701-774-1908	18		2	14	2		0	\$475—1 bed; 550-\$600-- 2 bed; \$625—3 bed; rent includes water, sewer, and garbage	36/3	75%/ 25%			New tenants pay more; 13 units are long-term tenants	Market
Marcil Mgmt aka Vesta Property Mgmt Bakken Heights 2007 and 2010	Karen Jacobsen 701-478-7014	144 4 36-plexes							Believed to be \$1100--\$1300					Called	Market
Marcil Mgmt aka Vesta Property Mgmt Building purchased from Leroy Anseth		24												Called	Market
Basin ET Properties	Daphne and Ralph 701-572-1187													Called	
Bekk's Realty Lori L Property Mgmt 701-774-8833	Bekk's Realty Lori L Property Mgmt Lori Lingenfootes 701-774-8833 www.bekks.com	0												<b>No longer manages rental; owns no rentals</b>	
Century Apartments 1509 Bison Dr. #506 <a href="http://www.williston.immapartments.com">www.williston.immapartments.com</a> 1970s	Jessica Woodhem, Manager, IMM Management 701-774-1153 701-774-1817 fax	192 8 build.		48	96	48		X	\$725—1 bed; \$850--2 bed; \$990—3 bed; rent includes water, sewer, garbage and heat	Don't know	90%/10	Individual and company			Market
D & D Rentals Williston Investment Group	D & D Rentals Doug Taylor Williston Investment Group														

	701-774-3710														
D & D Rentals Williston Investment Group	D & D Rentals Doug Taylor Williston Investment Group 701-774-3710	12			12			0	\$400- \$500/mo.— 2 bed; water, sewer, and garbage included in rent	Don't know	75%/25%	Individual			Market
D & D Rentals Williston Investment Group	D & D Rentals Doug Taylor Williston Investment Group 701-774-3710	8			8			0	\$400- \$500/mo.— 2 bed; water, sewer, and garbage included in rent	Don't know	75%/25%	Individual			Market
D & D Rentals Williston Investment Group	D & D Rentals Doug Taylor Williston Investment Group 701-774-3710	4			4			0	\$400- \$550/mo.— 2 bed; water, sewer, and garbage included in rent	Don't know	75%/25%	Individual			Market
D & D Rentals Williston Investment Group	D & D Rentals Doug Taylor Williston Investment Group 701-774-3710	8			8			0	\$500- \$650/mo.— 2 bed; water, sewer, and garbage included in rent	Don't know	75%/25%	Individual			Market
D & D Rentals Williston Investment Group	<b>Comments about D&amp;D Properties by Doug Taylor</b>								<b>No list; 25 calls a week; when a vacancy Taylor calls school and police dept. since it is good to have quality tenants</b>						<b>Bought first apt. 6 years ago; needed to offer first month free to fill; doesn't expect to keep raising the rents \$500- \$650 is sufficient for these</b>



Golden City Property 719 2 <sup>nd</sup> St. W <a href="http://www.dakotarealty.net">www.dakotarealty.net</a>	Kim Visser 572-0172 572-0897 (fax)														\$10 app. fee
Golden City Property Adria 2424 16 <sup>th</sup> Ave. West  2009	Kim Visser 572-0172 572-0897 (fax)	16			8	8		0	\$1295--2 bed; \$1395—3 bed; rent includes water, sewer, and garbage	40/7	50%/50%	Individual and company; 2 apts. leased to Sterling Crane			Market
Golden City Property Bison Drive 1718 14 <sup>th</sup> Ave.	Kim Visser 572-0172 572-0897 (fax)	12			12			0	\$500/mo.--2-bed; rent includes water, sewer, and garbage	22/3	17%;83%; 2 apts. by oil workers	Individual and company; 1 rented by Kadermas Lee and Jackson			Market
Golden City Property Eight Plex 1322 10 St West	Kim Visser 572-0172 572-0897 (fax)	8			8			0	\$400/mo.—2bed; rent includes water, sewer, and garbage	14/2	92%/8%	Individual and company; 1 apt. rented to ProFrac			Market
Golden City Property Four Plex 609 3 <sup>rd</sup> Ave. West	Kim Visser 572-0172 572-0897 (fax)	4		4				0	\$430-\$500/mo.—1 bed; rent includes water, sewer, and garbage	5/0	0%/100%	Individual			Market
Golden City Property Sixteen Plex	Kim Visser 572-0172 572-0897 (fax)	16				16		16	\$1450/mo.—3 bed; renter pays utilities					<b>Opening in Nov. 2010; GC rec'd over 50 apps for the 16 units</b>	Market
Golden City Property Sunrise Manor 1101-1216 6 <sup>th</sup> Ave. East  1950s	Kim Visser 572-0172 572-0897 (fax)	36 9 4-plexes			36			0	\$430/mo.—2 bed; rent includes water, sewer, and garbage	44/1	100%/0	Individual		Many senior citizens in building	Market

Golden City Property Sunset 1702 20 <sup>th</sup> Ave. West  1980	Kim Visser 572-0172 572-0897 (fax)	24		8	16			0	\$400/mo.— 1 bed; \$450- \$500/mo. 2bed rent includes water, sewer, and garbage	33/1	100%/0%	Individual		5 apts. rented to Opport. Found. ; 1 apt rented to Section 8 voucher holder	Market
Golden City Property Twite Rentals 8 8 <sup>th</sup> St. West	Kim Visser 572-0172 572-0897 (fax)	6		4	2			0	\$350/mo.— 1 bed; \$475/mo. 2bed rent includes heat, water, sewer, and garbage	10/1	100%/0%	Individual			Market
Golden City Property	<b>Comments about GC Properties by Kim Visser</b>								Long lists for all types of properties; 50 for the new 16- plex; receive 125 calls/week and numerous emails						
Highland Manor  1950s	Jessica Woodhem, Manager, IMM Management 701-774-1153 701-774-1817 fax	36			36			0	\$600—2 bed; rent includes water, sewer, and garbage	49/1	11%/89%	Individual			Market
Nancy Hoffelt	Nancy Hoffelt 701-572-7244	24												Not called	
Iron Tail Townhomes leased to Halliburton	Cascade Homes John Dunlap 406-580-8929 406-556-1257											Company; long-term lease with Halliburton		Data from Shawn Wenko	
Johnston Properties	Tony 701-570-6177													Called	
K & A Properties	701-572-7231													Called	
Liffrig Properties	John Liffrig 701-572-4068													Called	
Don Luebke	Don Luebke 701-774-0430													Called	
Mike Norland	701-572-4807													Called	

Ron Oster	Ron Oster 701-570-4484	12		2	10			0	\$450--\$575—1 bed; \$450-\$700-\$900—2bed; rent includes water, sewer, and garbage	Don't know	100%/0%			Rent varies with the tenure of the tenants; new tenants pay the most	Market
Park Village	Gene Iwen 701-572-8483	96	6	28	62			24	\$345/mo—studio; \$400/mo.—1 bed; \$450/mo.—2 bed; deposits of \$300-\$350; rent includes water, sewer, and garbage; rent will increase March 1, 2011; stopped taking names for the list; 25-30 calls per day	250/3	70%/30%	Individual		It appears to take about a year to find an apartment in Williston	Market
Pineview Apartments 11 <sup>th</sup> Street West <a href="mailto:elkcreekproperties@gmail.com">elkcreekproperties@gmail.com</a>  2010	Elk Creek Properties  Matt Cossette 701-280-9702	32		2	30			0	\$800/mo.—1 bed; \$1100/mo.—2 bed; rent includes water, sewer, and garbage; 300 on list; 25 call per week	64/4	25%/75%	Individual and company		New building—just opened; no other properties under dev. In Williston	Market

Ridgeview Vesta Properties 2010 10 <sup>th</sup> St E	Jennifer 701-572-7612	96												Called	1, 2 and 3 bedroom units
Riverside Apartments	Deann Long 701-572-8191	43	1	24	18			0	\$465-- \$510—1 bed; \$700- \$725— 2bed; 0- \$725—eff. (new); rent includes all utilities included	92/20	95%/5%	Individual and company	2 bed units have washer and dry hookups ; mail room is being made into eff. apt		<b>Market;</b>  <b>was 30% AGI HUD until July 1, 2010;</b> got 3 year special subsidy from HUD; some existing tenants have gone to Williston Housing Authority
SLR Investments	John Liffbrig 701- 572-4068													Called	
TLB Properties	Troy 701-770-4882													Called	1 and 2 bedroom units
Vesta Properties PO Box 2414 Williston ND 58802 www.vestaproperty management.com	Jennifer 701/572-7612 701-570-9829													Called	Moderate -High Income Propertie s 1, 2 & 3 Bedroom s
Western		32												Not called	
<b>Apartments Under Construction</b>															
Northview Region 1 Client Services	Deann Long 701-572-8191	4				4		4 2	\$660 max. for 2010 moderate and \$1000/mo market; tenant pays all utilities					Full; have tenants that were selected	If market could get \$1500-- \$2000/ mo  Financed by HOME



http://www.mhvillage.com	701-572-5484; 701-570-3710	167 MH; 5 RVs	includes water sewer, and garbage	includes water, sewer, garbage, and electricity; RVs will be hosted over the winter	streets				company; 1 company has a MH	
Glenn Villa	John Glenn 701-572-2833	108 MH; 0RV	\$160/mo; rent includes water, sewer, and garbage		Paved streets	0%; no waiting list; 30 calls per week	286/70	85%/15%		No rentals and no plans to expand; this year could have filled 500 spaces
Schatz Mobile Home Court	Becky Schatz 701-572-5937	114 MH; 0 RV; Schatz expanded recently—10 additional spaces	\$200/mo. rent; includes water, sewer, and garbage		Paved streets	0%; keep a waiting list for those who want to move in an owned-MH; 25-30 calls per week	300/40-50; could be more some families may be doubling-up	75%;25%; all who move in now must purchase a MH; the 25% who are new comers will stay as long as the work stays and will have to move MH or sell	Individuals; all must own homes; too much trouble with renters	No rentals; tried to expand to 41 RV slots on 2 acres but denied by city; about 5 rental MH are still in the lot owned by other landlords
Sand Creek Estates http://www.mhvillage.com (must purchase MH from Sand Creek in order to place a mobile home in the lot)	Kathy Mita 701-570-5756  Data from Shawn Wenko	225 MH			Paved streets				Called	
<b>RV Courts</b>										
Buffalo Trails Campground	Helen Branvold, manager 701-572-3206	100+ RV; 0 MH		RV \$450/month; rent includes water, sewer, garbage, and electricity		0%	250-300/6; many young men	50%/50%; if could get housing more would be permanent; will stay open all winter long; expect to lose only about 5 RVs—people have no place to go	Individual and company	Market
Prairie Acres RV Park	Jenelle Loomer 701-572-4860	0 MH; 35 RVs; 20 long-term RVs; 15 short-term		\$600/mo. for long term; \$25/night short-term; rents include water,		A few short-term spaces are open	For long-term renters 27/5	0%/100%; long-term renters are all construction workers working on a project that	Individual	Market

		spaces		sewer, garbage, and electricity				will end soon; <b>depending on weather expect to close the RV park at the end of October, 2010 for the season</b>		
<b>Potential Mobile Home Court Developments</b>										

Source: Shawn Wenko, City of Williston Workforce Development Coordinator; Deann Long, Region 1 Client Services

### City of Williston Mobile Home Rentals

City identifier and age	Contact	Rental mobile home and age	Size (single/dbl; bedrooms)	Mobile home rental rate; does this include the lot rent?	Current rent, waiting list, number of calls in last week	Number living in the mobile home; percent under 18	Percent permanent; percent temporary	Renter (company or individual)	Notes	Comments
Gary Ingman  N. of city limits	Gary Ingman 701-572-0044 701-774-9492	1980	Dbl wide; 3 bed; large 3-door shop	\$750 includes lot rent; on a well; tenant pays utilities	\$750; no list; 1-2 calls per day (to Ace Property Management, a business run by Mr. Ingman)	2/0	100%/0%	Individual		Tenant knows this is a good deal
Ron Oster 12 MHs 11 MH in Williston; 1 MH outside city limits	Ron Oster, owner 701-694-4285; 701-570-4484		All single wides	\$1250-\$1750; includes lot rent; companies pay \$1750		Assume 3 per home and half are families; 36/12	100%/0%	Individual and company; about half are company rentals		
Sand Creek Estates	Kathy Mita 701-570-5756  Data from Shawn Wenko			3 bed room mobile home rent believed to be \$900					Called	

Source: Shawn Wenko, City of Williston Workforce Development Coordinator; Deann Long, Region 1 Client Services

### City of Williston Rental Houses

City identifier and age	Contact						Garage	Current rent, waiting list, number of calls in last week	Number living in the building; percent under 18	Percent permanent; percent temporary	Renter (company or individual)	Notes	Comments
		1-bedroom	2-bedroom	3-bedroom	4-bedrooms	5-bedrooms							
Ace Property Mgmt 7 Town Houses	Gary Ingman 701-572-0044		6	1			7	\$650-\$750-\$800/mo.-- 2	12/4	100%/0%	Individual	Different owners	Last vacancy ad.

6 NW Williston; 1 on east side of Williston	701- 774-9492							bed; \$1200/mo.—3 bed; tenant pays all utilities; doesn't keep a list; 5-10 calls per week				have different rent rates	in the Shopper and rec'd 140 calls; next vacancy will place a sign on the shop
Ace Property Mgmt Older small house	Gary Ingman 701-572-0044 701- 774-9492	X					0	\$400/mo.; tenant pays all utilities doesn't keep a list; 5-10 calls per week	2/0	100%/0%	Individual		Last vacancy ad. in the Shopper and rec'd 140 calls; next vacancy will place a sign on the shop
Bekk's Realty Lori L Property Mgmt 701-774-8833	Bekk's Realty Lori L Property Mgmt Lori Lingenfootes 701-774-8833 www.bekks.com											<b>No longer manages rental; owns no rentals</b>	
D & D Rentals	D & D Rentals 701-774-3710											Called; has no rental houses	
Ron Oster 1 House	Ron Oster, owner 701-694-4285; 701-570-4484					X	2	\$3700/mo; rent includes all utilities and yard maintenance	5/0	0%/100%	Company		Rent to land men who use the building for offices and lodging
Rollie Dalin Columbus, ND house and townhouses	701-939-5016											Called	

Golden City Property 719 2 <sup>nd</sup> St. W	Kim Visser 572-0172 572-0897 (fax)												
Golden City Property 5 Townhouses NW Williston  1980s	Kim Visser 572-0172 572-0897 (fax)		X				5	\$450- \$550/mo.—2 bed; renter pays all utilities	10/2	100%/0%	Individual		Market
Golden City Property 26 Houses	Kim Visser 572-0172 572-0897 (fax)	X	X	X	X		X	\$375—1 bed; \$475—2 bed; \$500—3 bed; \$600-\$700—4 bed; renter pays all utilities	70/25	965%/4%	Individual and company; 1 home rented by company and it is the most expensive-- \$700 for a 4 bed, 2 bath, 2 car garage house		Market
Golden City Property	<b>Comments about GC Properties by Kim Visser</b>							Long lists for all types of properties; 50 for the new 16-plex; receive 125 calls/week and numerous emails					
Vesta Properties PO Box 2414 Williston ND 58802 www.vestaproperty management.com	Jennifer/Courtney 701/572-7612 701-570-9829											Called	
West Wind Townhouses	701-572-4671											Called	
Leonard Winter Townhouses	701-774-3442											Called	

Source: Named contacts

City of Williston Man Camps/Temporary Recreational Vehicle Courts

Identifier	Contact	Type	Permitted units	Permitted capacity (individuals)	Company	Amenities	Current occupancy rate	Percent permanent; percent temporary	Open closed	Rate	Notes
<b>City of Williston; Ordinance only allow single company camps (i.e., not open to any tenant)</b>											
Baker Hughes	Gale Van Buren 970-223-3492 970-443-5905	All-year trailers	5	20	Baker Hughes				Baker Hughes employees		
Halliburton Approved March 15, 2010	Target Logistics	All-year facility; shipping containers configured with halls and common areas used at 2010 Olympics	---	158 rooms Limit 1 per room; permitted for 312	Halliburton				Halliburton employees		
Prairie Packing approved April 27, 2010	Gale Van Buren 970-223-3492 970-443-5905	All-year modular units	18	115	Halliburton				Halliburton employees		
<b>Williams County; Fewer regulations (open camps are operating)</b>											
Contractor Lodging Solution approved April 6, 2010; Missouri Ridge TWP		All-year facility	---	60							
Steve Mortenson approved April 6, 2010; Judson TWP		All-year trailers	3	6							
ND Department of Game & Fish approved April 5,6, 2010; Williston TWP		All-year trailers	3	6-10							
Dee Atanasu approved June 1, 2010; Round Prairie TWP		RV park	24	48							
Brigham Oil approved June 1, 2010; Judson TWP		All-year trailers	14	20-24							
Rick Ostert approved June 1, 2010; Stony Creek TWP		All-year modular units	5	10-15							

Corey Moen approved June 29, 2010; Springbrook TWP		RV park	50	100							
Contractor Lodging approved July 6, 2010; Missouri Ridge TWP		All-year facility	---	240							
Michael Marcy approved July 6, 2010; Missouri Ridge TWP		All-year trailers (mobile homes)	3	6-10							
Raymond Gleave approved July 6, 2010; Pleasant Valley TWP		All-year trailers									
S&S Sales approved August 3, 2010; Williston TWP		All-year trailers	18	36							
Lone Tree approved August 3, 2010; Judson TWP		All-year facility	---	40							
ATCO Structures approved August 9, 2010, Missouri Ridge TWP	Cole Crook, Mgr 402-292-7637 403-703-6951	All-year facility	---	200					Open to anyone		
Dennis Nehring approved August 31, 2010; Round Prairie TWP		All-year trailers	8	16							
Contractors Lodging approved August 31, 2010; West Bank TWP		All-year facility	---	386							

Source: Elaine Sinness, City of Williston/Williams County Planning

### City of Williston Senior Apartments

City identifier and age	Contact	Units	Efficiency	1-bedroom	2-bedroom	Garage	Rent and waiting list	Current vacancy rate	Historic vacancy rate	Comments	Type
Bethel Assisted Living Apartments 2010 Owned by Bethel Home	Curt Stoner, Bethel Home Administrator 701-572-6766 Lois Reiersen, Director, Williams County Social Services 701-774-6300	33		22	11	0	\$2650/mo.—1 bed; \$2950/mo.—2 bed	31/33 vacant; expected to fill by winter	Opened 2010	Williston does not need more market elderly housing; Williston needs elderly housing for those that can't afford market rent; as older buildings are sold this will become more of a problem	Market Assisted Living
Bethel Heritage Estates Owned by Bethel Foundation	<a href="http://www.bethellutheranhome.com/Independent%20Living%20Apt.htm">http://www.bethellutheranhome.com/Independent%20Living%20Apt.htm</a> Curt Stoner, Bethel Home Administrator 701-572-6766	9			9	10	\$995—2 bed; rent includes garage, heat, water, sewer, garbage, and electricity	0%; 150 on list			Market Independent Living Newer building—higher rent
Bethel Home (19 Basic Care Beds, 168 Long Term Care Beds)	Curt Stoner, Bethel Home Administrator 701-572-6766	187						---			Nursing Home

Bethel Heritage Manor  Owned by Bethel Foundation	<a href="http://www.bethellutheranhome.com/Independent%20Living%20Apt.htm">http://www.bethellutheranhome.com/Independent%20Living%20Apt.htm</a> Curt Stoner, Bethel Home Administrator 701-572-6766	20		12	8	10	\$531—1 bed; \$652—2bed; includes garage (when avail.) heat, water, sewer, garbage, and heat	0%; 150 on list			LITCH; must be income eligible to live in the building  Independent Living
Bethel Terrace  Owned by Bethel Foundation	<a href="http://www.bethellutheranhome.com/Independent%20Living%20Apt.htm">http://www.bethellutheranhome.com/Independent%20Living%20Apt.htm</a> Curt Stoner, Bethel Home Administrator 701-572-6766	17		2	15	8	\$444—1 bed; \$652—2 bed; garages—35/mo. rent includes heat, water, sewer, garbage, and cable TV	0%; 150 on list			Independent Living  Market  Older building—lower rent
Briarwood	701-572-1555 701-572-9871	24								Called	
Golden Estates	701-774-8089	16				64' x70' parking garage				Called	
Kensington 3-story former motel; 71 basic care beds	Sandy Riveland 701-774-0424	71									Nursing Home

Kensington 3-story former motel; 39 permitted senior apartments	Sandy Riveland 701-774-0424	Not disclosed mix of studios, 2 room and 3 room apartments				0	\$2250-\$3450 depending on apartment size for assisted living; \$850--\$1900 depending on apartment size for independent living	Not disclosed ; no list		The assisted living has a large number of vacancies; to fill the building independent apartments are being developed; so far no occupied independent apts.	Assisted Living and Independent Living  Market
<b>Senior Housing Being Constructed</b>											
G.A Haan Development		40 units								Data from Shawn Wenko	

Source: Curt Stoner, Bethel Home Administrator; Lois Reiersen, Director, Williams County Social Services; Named contacts

**City of Williston Motels, Hotels, and Sleeping Rooms (Includes Williston State College Dorms)**

City identifier	Contact	Units	1-bed	2-bed	Suite	Rental rate	Occupancy	Number in building	Traveler/workers percentages	Spot; long term percentages	Renter (company or individual)	Notes	Type
Motels/Hotels													
Airport International Inn	Brad Nelson 701-774-0241	144											
Candlewood Inn and Suites <a href="http://www.candlewoodsuites.com">www.candlewoodsuites.com</a>	Toak Clark 701-572-3716	80					100%					Booked until mid-Jan. 2011; corp. clients are required to have 90 day commitments	
El Rancho Motor Hotel <a href="http://www.elranchomotel.com">www.elranchomotel.com</a>	Cindy Aafedt 701-572-6321	92											
Marquis Plaza and Suites <a href="http://www.marquisnd.com">www.marquisnd.com</a>	Frankie Aars 701-774-3250	43											
Missouri Flats Inn <a href="http://www.missouriflatsinn.com">www.missouriflatsinn.com</a>	Frankie Aars 701-572-4242	60											
Super 8 Lodge <a href="http://www.super8.com">www.super8.com</a>	Carla Hurley 701-572-8371	82											

The Vegas	Jeff Smith 701-572-2574	60											
Travel Host	Bob Stenjem 800-761-4678	125											
<b>Sleeping Rooms</b>													
Rough Rider Motel													Formerly Kitzan-CFD, an senior living boarding house; sold to an oil company that uses it as sleeping rooms according to Curt Stoner, Bethel Home Administrator 701-572-6766
<b>Hotels Under Construction</b>													
Downtown location?	Joe Lafave	50?											
HomStay	Larry Brutger	80											
Microtel Inn and Suites	Braxton Development, Bozeman, MT	77											
<b>Dormitories Under Construction</b>													
Williston State College dormitory		171 beds											
<b>Potential Hotel Development</b>													
Holiday Inn Express	Larry Brutger												
Airport International Inn	Brad Nelson 701-774-0241	84 room expansion											
Hotel development on Williston Parks and Recreation Property													

Source: Shawn Wenko, City of Williston Workforce Development Coordinator

## Appendix C: 2010 Williston Capital Improvement Plan



WILLISTON

## CAPITAL IMPROVEMENTS PLAN

INVEST IN THE WEST | To Help Fund The Rest

# BUILD WILLISTON

CENTER OF THE WILLISTON BASIN

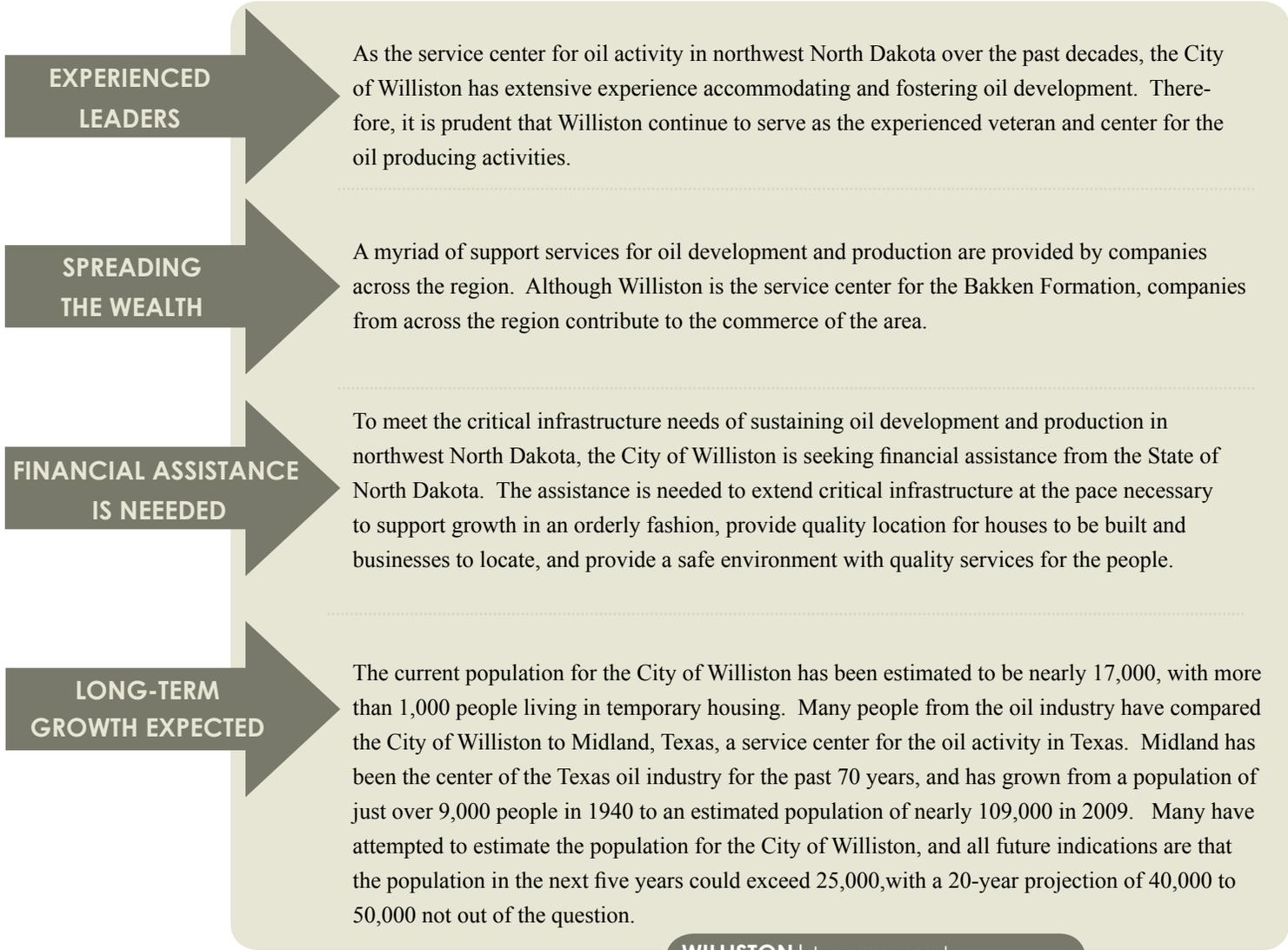


## WILLISTON | Capital Improvements Plan

<b>INVEST IN THE WEST</b>   To Help Fund The Rest	1
<b>TRANSPORTATION</b>   Improvements	4
<b>WASTEWATER</b>   System Improvements	5
<b>STORM WATER</b>   System Improvements	5
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# INVEST IN THE WEST | To Help Fund The Rest

The City of Williston has been, and continues to be, the service center for oil activity in northwest North Dakota. Over the past several years, the City has experienced significant growth due to increased oil activity associated with the Bakken Formation. Current estimates indicate that the population has increased by nearly 40 percent since 2006, with a substantial amount of this new growth living in temporary housing. To support the current and projected future growth, the City of Williston has estimated that more than \$182,000,000 in fundamental infrastructure investments are necessary to address critical challenges related to transportation, wastewater, water, storm sewer, solid waste, and institutional services.



WILLISTON   Improvements	
Project	Total Estimated Project Costs
<b>Transportation</b>	\$112,250,000
<b>Wastewater</b>	\$50,409,400
<b>Stormwater</b>	\$400,000
<b>Water</b>	\$550,000
<b>Buildings</b>	\$16,350,000
<b>Solid Waste</b>	\$2,400,000
<b>SUBTOTAL</b>	\$182,359,400

**TRANSPORTATION | Improvements**

Project	Total Estimated Project Costs	Population			
		20,000	25,000	30,000	40,000
Highway 2 Corridor	\$35,500,000	\$35,500,000			
East Williston Truck Route	\$5,625,000	\$5,625,000			
26th Street West	\$7,500,000		\$7,500,000		
Northwest Bypass	\$33,000,000	\$33,000,000			
32nd Ave. West	\$30,625,000			\$30,625,000	
Airport Improvements	FAA				
<b>SUBTOTAL</b>	<b>\$112,250,000</b>	<b>\$74,125,000</b>	<b>\$7,500,000</b>	<b>\$30,625,000</b>	<b>\$0</b>

**WASTEWATER | System Improvements**

Project	Total Estimated Project Costs	Population			
		20,000	25,000	30,000	40,000
<b>Wastewater Treatment Plant Upgrade</b>	<b>\$41,800,000</b>	<b>\$15,000,000</b>	<b>\$19,900,000</b>		<b>\$6,900,000</b>
<b>Collection System Extensions</b> (Trunkline, Force Mains and Lift Station)					
NE EXHIBIT A Population Equivalent = 2970	\$747,400	\$747,400			
WEST EXHIBIT D Population Equivalent = 9561	\$2,996,000	\$2,996,000			
NE EXHIBIT C Population Equivalent = 2844	\$1,091,000		\$1,091,000		
NE EXHIBIT B Population Equivalent = 7068	\$545,000		\$545,000		
<b>East Side Lift Station</b>	<b>\$350,000</b>	<b>\$350,000</b>			
<b>West Side Lift Station</b>	<b>\$2,880,000</b>	<b>\$2,880,000</b>			
<b>SUBTOTAL</b>	<b>\$50,409,400</b>	<b>\$21,973,400</b>	<b>\$21,536,000</b>	<b>\$0</b>	<b>\$6,900,000</b>

**STORM WATER | System Improvements**

Project	Total Estimated Project Costs	Population			
		20,000	25,000	30,000	40,000
<b>Storm Water System Master Planning</b>	<b>\$400,000</b>	<b>\$400,000</b>			
<b>SUBTOTAL</b>	<b>\$400,000</b>	<b>\$400,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>



WATER   System Improvements		Population			
Project	Total Estimated Project Costs	20,000	25,000	30,000	40,000
Northwest Pumping Station	\$250,000	\$250,00			
Northeast Pumping Station	\$300,000	\$300,000			
<b>Northwest ND Regional Water Supply</b>					
NW Regional Water -West Service Connection	\$2,500,000	All estimated project costs for City of Williston Water Treatment and Supply System are included in the Regional Water System Improvement Plan, which will be funded through water rates.  *Not included in Total			
Water Treatment Expansion	\$6,000,000				
Surface Water Supply Intake Improvements	\$1,500,000				
Horizontal Collector Well and Transmission Pipe	\$15,000,000				
NW Area Regional Water Treatment	\$25,000,000				
<b>SUBTOTAL</b>	<b>\$550,000</b>	<b>\$550,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

BUILDINGS   Emergency Response & Government Services		Population			
Project	Total Estimated Project Costs	20,000	25,000	30,000	40,000
<b>Fire /Ambulance</b>					
26th Ave Substation	\$2,350,000	\$2,350,000			
Highway 2 West Substation	\$2,350,000		\$2,350,000		
Highway 2 North Substation	\$2,350,000			\$2,350,000	
<b>Government Services Building Space</b>	<b>\$9,300,000</b>	<b>\$3,100,000</b>	<b>\$1,550,000</b>	<b>\$1,550,000</b>	<b>\$3,100,000</b>
<b>SUBTOTAL</b>	<b>\$16,350,000</b>	<b>\$5,450,000</b>	<b>\$3,900,000</b>	<b>\$3,900,000</b>	<b>\$3,100,000</b>

SOLID WASTE   Landfills		Population			
Project	Total Estimated Project Costs	20,000	25,000	30,000	40,000
Landfill Expansion	\$2,400,000	\$2,400,000			
<b>SUBTOTAL</b>	<b>\$2,400,000</b>	<b>\$2,400,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

TOTAL	Total Estimated Project Costs	Population			
	\$182,359,400	20,000	25,000	30,000	40,000
		\$104,898,400	\$32,936,000	\$34,525,000	\$10,000,000



**PRIMARY GOALS**

Safety, Efficient Movement of People and Goods, Multimodal Transportation, Land Use/Development, Coordination between Local and State Jurisdictions, and Economic Development.

Through comprehensive planning, the City of Williston has developed transportation planning tools to address six primary goals: safety, efficient movement of people and goods, multimodal transportation, land use/development, coordination between local and state jurisdictions, and economic development. Numerous studies have been developed over the past several years to address the transportation improvements as they relate to the City of Williston and the surrounding areas. Exhibit A illustrates the five major transportation improvement projects that have been included in the Capital Improvements Plan.

Additional information regarding the studies can be found at:

<http://www.willistonplan.com/pdf/WillistonHWY2DraftReport-2010-03-22.pdf>

[http://www.willistonplan.com/pdf/May2010\\_WillistonTP\\_FinalDraft-052010.pdf](http://www.willistonplan.com/pdf/May2010_WillistonTP_FinalDraft-052010.pdf)



**Highway 2 Corridor**

Improvements to the Hwy 2 Corridor will include upgrades as identified in the Hwy 2/85 Corridor Study. In general, the improvements will include a realignment of various segments of the roadway to increase turning radii and create improved intersections, eliminate several intersections to minimize potential traffic/pedestrian conflicts, and improve traffic control by improving turning lanes and adding signalized intersections where necessary. (\$35,500,000)

**East Williston Truck Route**

This project is a Truck Route designation that realigns 51st Street NW along the north side of the industrial park to elongate the east/west segment and reduce grade conflicts. Improvements will be constructed to increase pavement thickness and increase shoulder widths throughout the remainder of the corridor to facilitate designation as a Truck Route. This project is intended to reduce traffic on East Dakota Parkway. (\$5,625,000)

**26th Street West**

This project involves the construction of 26th Street West. The project will include a paved two-lane arterial roadway with urban sections



from 138th Avenue NW to 139th Avenue NW as well as the construction of a paved two-lane roadway with rural sections from 139th Avenue NW to 141st Avenue NW. (\$7,500,000)

**Northwest Bypass**

The Northwest Bypass is a recommended roadway that will bypass the City of Williston and allow traffic to flow without interference from local traffic, as well as reduce congestion within the City, while improving roadway safety. The bypass will begin west of Williston at the intersection of Highway 85 and Highway 2 and extend north and east to a point north of Williston at the intersection of Highway 2 and County Highway 7. Funding for this project will require considerable coordination and collaboration between the Federal, State, and Local agencies. (\$33,000,000)

**32nd Avenue West**

The 32nd Avenue West project provides a critical north/south connection between Highway 2/85 and 53rd Street NW. The project will involve paving a two-lane arterial through the project corridor, with an urban section from 53rd Street NW to 26th Street NW. In addition, the project will also preserve the right-of-way for the construction of three to five-lane arterial (including bridge over Sand Creek) as needed to serve further development in the area.

**Airport/Railroad**

The City of Williston relies on consistent and reliable air services for both passenger travel and freight delivery. To continue to provide this service, it is critical that the City continue to work with the Federal Aviation Administration to ensure that proper planning and funding are made available for future improvements or expansions to the airport as deemed necessary. In addition, air service and railroads play a critical role in providing delivery of goods to the City of Williston. Consideration should be giving to a future intermodal transport station to allow for integrated and efficient transportation of freight using multiple modes of transportation such as air, rail, and truck.

The City of Williston has developed comprehensive Wastewater Master Plans to address the Wastewater Treatment Facility (WWTF) as well as the sanitary sewer collection system. The Capital Improvements Plans (CIP) for the Wastewater system were developed to prioritize the projects that were identified.

**Wastewater Treatment Facility**

The Williston WWTF is currently operating at capacity. To address capacity limitations at the WWTF, it is anticipated that the City of Williston will be required to complete a multi-phased expansion. Each phase builds upon the previous phase until ultimate capacity of the existing WWTF site and treatment type is reached.

Each phase builds upon the previous phase until ultimate capacity of the existing WWTF site and treatment type is reached.



<b>PHASE 1</b>	Expansion of the pond storage facilities, improvements to the headworks facility, expansion of the aerated pond system, and expansion of the effluent pumping system. (\$15,000,000)
<b>PHASE 2</b>	Conversion of the facility to a continuous discharge facility. This will require additional aerated pond capacity, tertiary treatment, new disinfection system, and expanded effluent pumping. (\$19,900,000)
<b>PHASE 3</b>	The third phase will include the conversion of existing storage ponds to aeration ponds. At this time, the facility will be expanded to the maximum limits of the site. (\$6,900,000)

**Collection System Extensions**

The wastewater collection system has been divided in to four separate service areas as well as two individual lift stations. Major collection system improvements (typically gravity sewer greater than 15-inches in diameter, forcemains, and major lift stations) have been included in the CIP. Exhibits of each service area have been provided to illustrate the proposed improvements that

are necessary to serve the areas. It should be noted that projects included in the CIP have been shown with the bold lines. Other infrastructure will be necessary for development, but has not been incorporated into the CIP, as it will typically be addressed through developer fees or special assessments. A summary of the related project costs are shown at the bottom of each exhibit and in the enclosed table insert.



**Storm Water System Master Planning**

To address the eminent impacts of future development on the storm water system, it is imperative that the City develop a storm water runoff evaluation and concept-level storm water master plan. The evaluation will address existing system limitations, as well as identify the future regional storm water infrastructure that will be required as new properties are developed. Two specific devel-

opment areas have been identified as needing immediate attention. These areas are Pheasant Run Development and Sand Creek Development. In addition, it is recommended that the capital improvements budget include dollars for the City to purchase critical regional storm water detention/retention areas that are identified during the master planning process. (\$400,000)



### Regional Water System Improvements

As a regional water stakeholder in northwest North Dakota, the City of Williston has been collaborating on a regional water development plan for the past several years. The efforts have resulted in the development of a regional water supply plan centered on the Missouri River and the Williston Regional Water Treatment Facility as the source for the regional water demands. A detailed discussion of the projects necessary to implement the water development plan are not included in this plan since it is to be funded through water sales.

Note: The Regional Water System Improvements are not included in the Capital Improvements Plan

### Northwest Pumping Station

The Northwest Pumping Station is an interim pumping station required to provide adequate domestic supply to developing areas in Northwest Williston. Although this area will be served by the future regional water system improvements, it is critical that this pumping station be constructed in the interim to provide adequate pressure and flow to the existing and proposed developments. Exhibit E illustrates the proposed location of the Northwest Pumping Station as well as the proposed service area. (\$250,000)

### Northeast Pumping Station

The Northeast Pumping Station is an interim pumping station required to provide domestic supply to existing and proposed development along the northeastern portion of Williston. This area is illustrated in Exhibit E. Proposals for development within this area have been delayed due to the inability of the City's water system to provide adequate flow and pressure. Therefore, it is proposed that a pumping station be constructed to provide service to this area and allow development to occur. (\$300,000)





**Public Services**

The City of Williston is served by law enforcement from the City Police Department, Williams County Sheriff’s Department, and the State Highway Patrol. The City recently constructed a new Law Enforcement Center. This facility is expected to handle the future needs with minor equipment upgrades.

Ambulance service is provided through an Ambulance District located in Williston in partnership with the Williston Fire Department. Fire Protection is provided by the Williston Fire Department located on 11th Street West.

As the City is expanding, the service areas for emergency services are also expanding. It is critical that the emergency response facilities are located in strategic locations to ensure that the emergency services can respond in a timely manner.

**Fire /Ambulance Substations**

Three new Emergency Service Substations have been identified in the Capital Improvements Plan. A map of the existing fire station with a 1.5 mile service area is provided in Exhibit F. This Exhibit also identifies proposed locations for three new fire/ambulance substations as well as the proposed service boundaries for each of the substations. (\$7,050,000)

As the City is expanding, the service areas for emergency services are also expanding. It is critical that the emergency services are located in strategic locations to ensure that the emergency services can respond in a timely manner.

**Government Buildings**

The City of Williston’s planning, engineering, and inspection services along with it’s finance and utility billing departments are experiencing extreme demand and growth. The current City Hall is crowded and the space to intake, review plans, and meet with developers, engineers, and contractors is inadequate to handle the current number of requests not to mention the projected growth. Additionally, the Economic Development and Job Development offices are lacking adequate facilities to conduct meetings internally and with external groups. In consideration of these departments and their ability to successfully perform their duties, additional building space has been included in the CIP. (\$9,300,000)





### Landfill Expansion

To ensure that the City has the capacity to dispose of the increased volume of solid waste, it is anticipated that an expansion of the solid waste disposal facility will be necessary. The expansion will involve a new solid waste disposal cell that is estimated to cover approximately 10 acres. The expansion will occur adjacent to the existing landfill and will not require additional acquisition of property

or rezoning, which can be two major hurdles in landfill expansions. The project will involve the excavation of the new landfill cell, preparation of the cell with an appropriate liner, and the installation of a leachate collection system to meet US Environmental Protection Agency, Municipal Solid Waste, Subtitle D Regulations. (\$2,400,000)

TRANSPORTATION (A) | 10

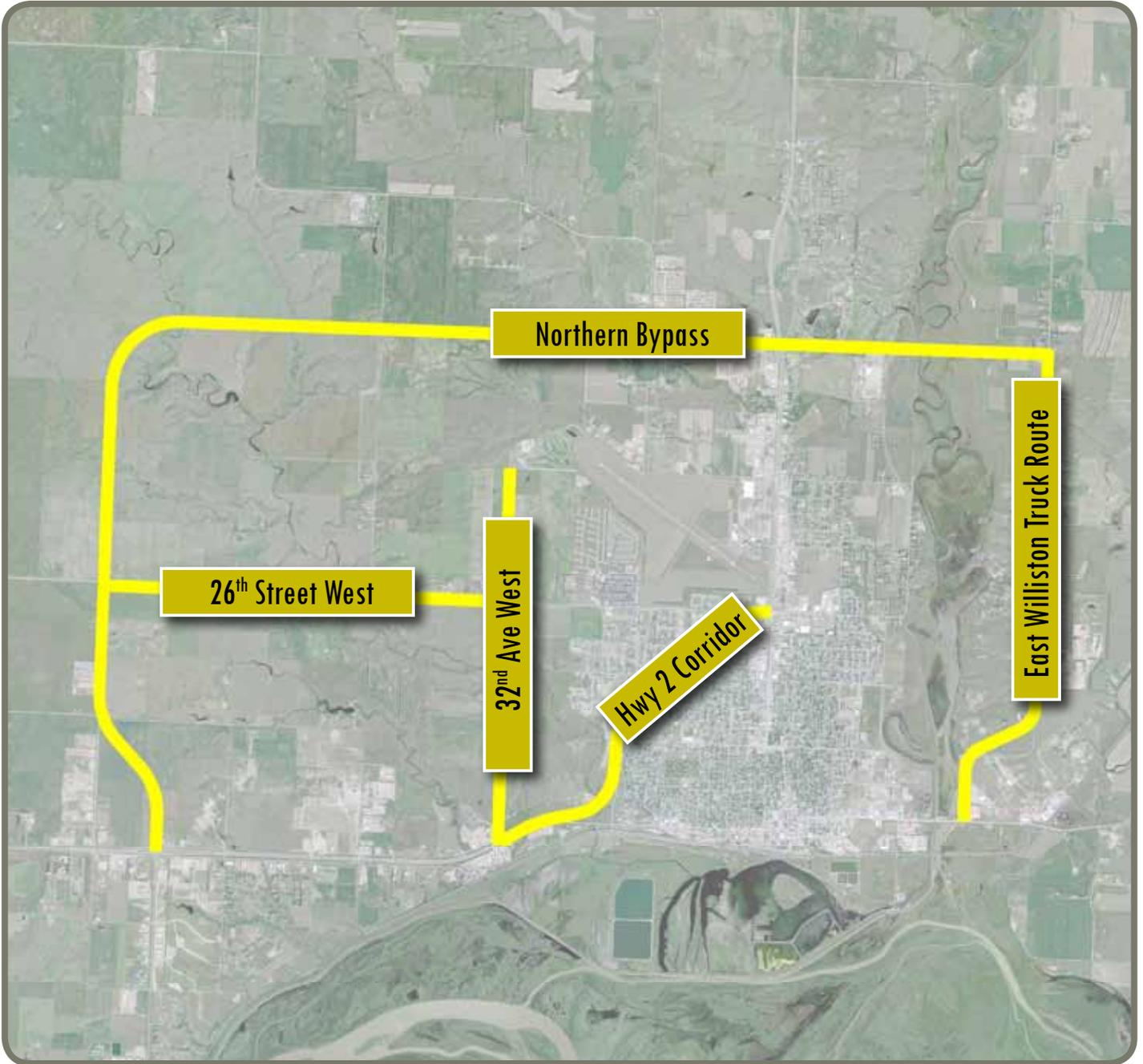
WASTEWATER (B-D) | 11

WATER (E) | 14

EMERGENCY (F) | 15

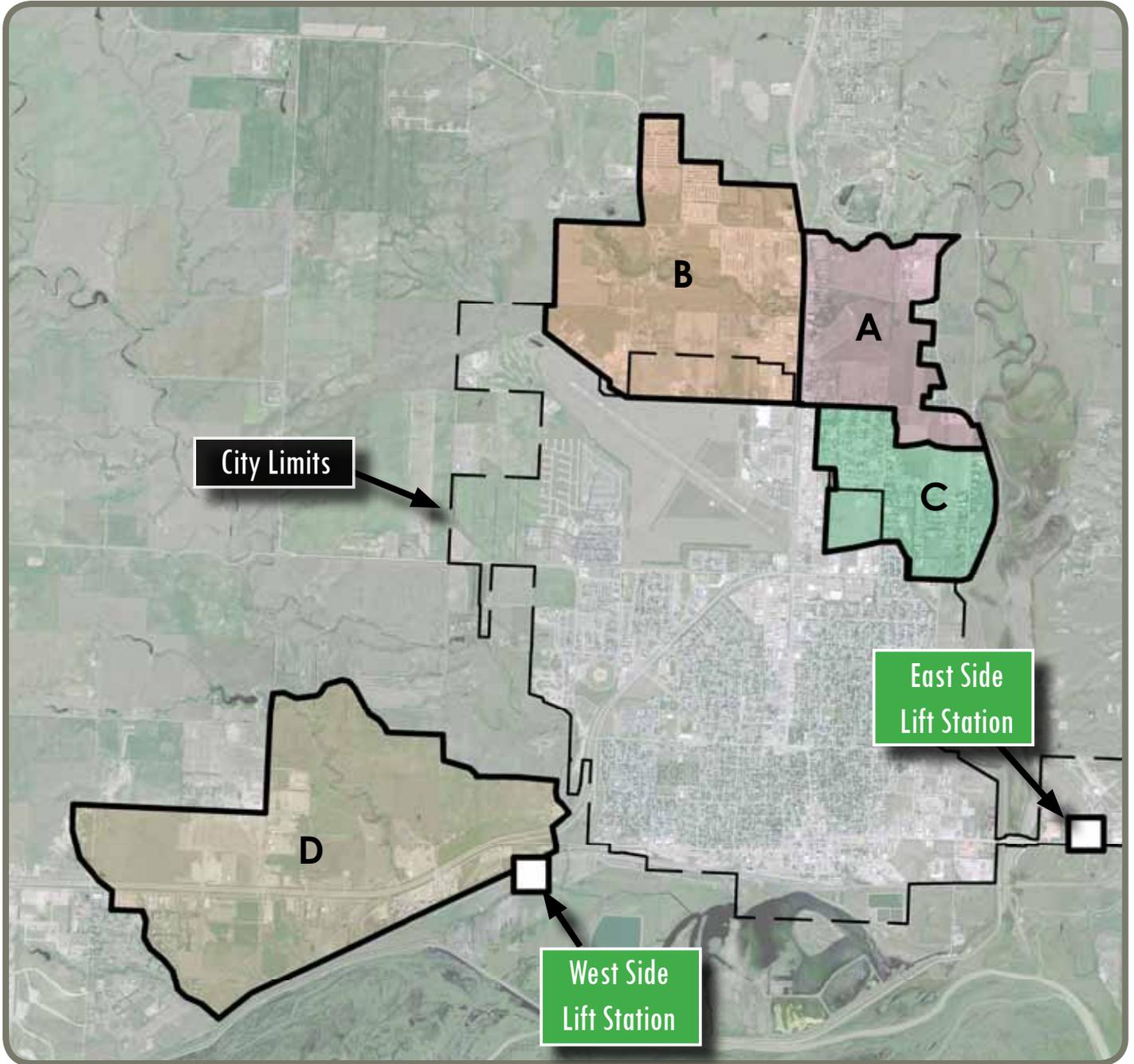
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# WILLISTON CAPITAL IMPROVEMENTS PLAN



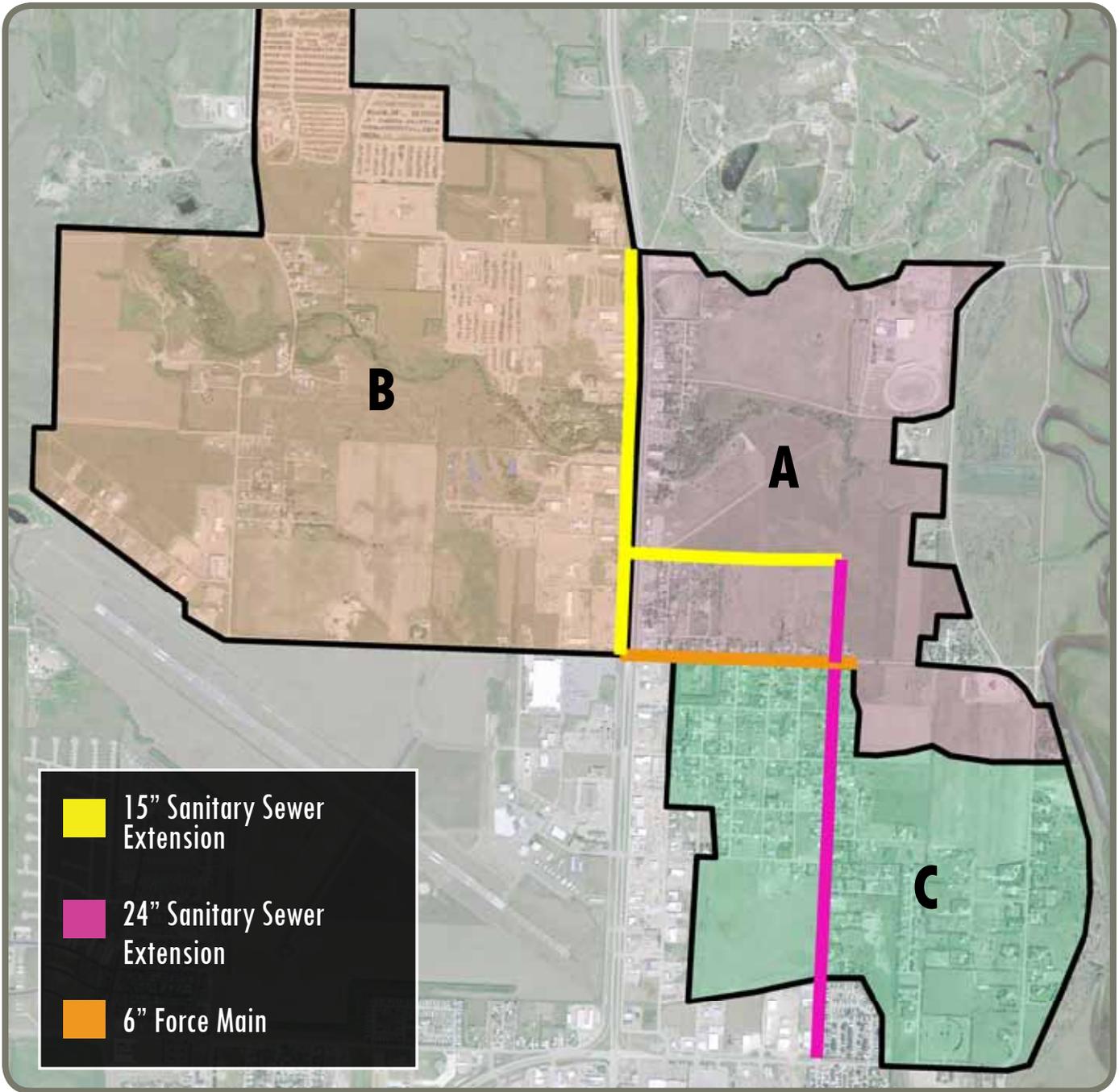
TRANSPORTATION | Improvements

	Total Estimated Project Costs
<b>SUBTOTAL</b>	\$112,250,000



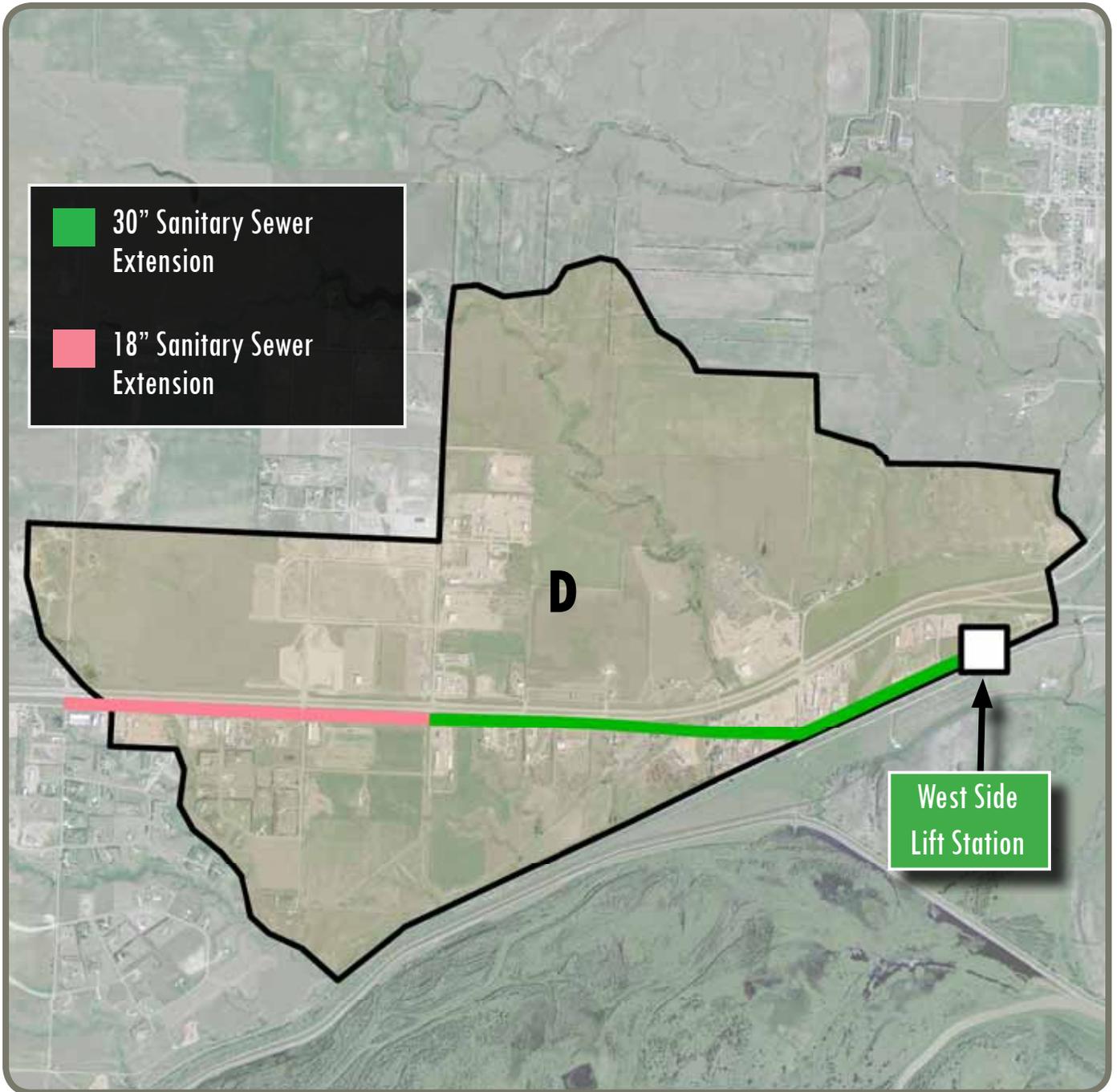
WASTEWATER | System Improvements

	Total Estimated Project Costs
<b>SUBTOTAL</b>	<b>\$50,409,000</b>



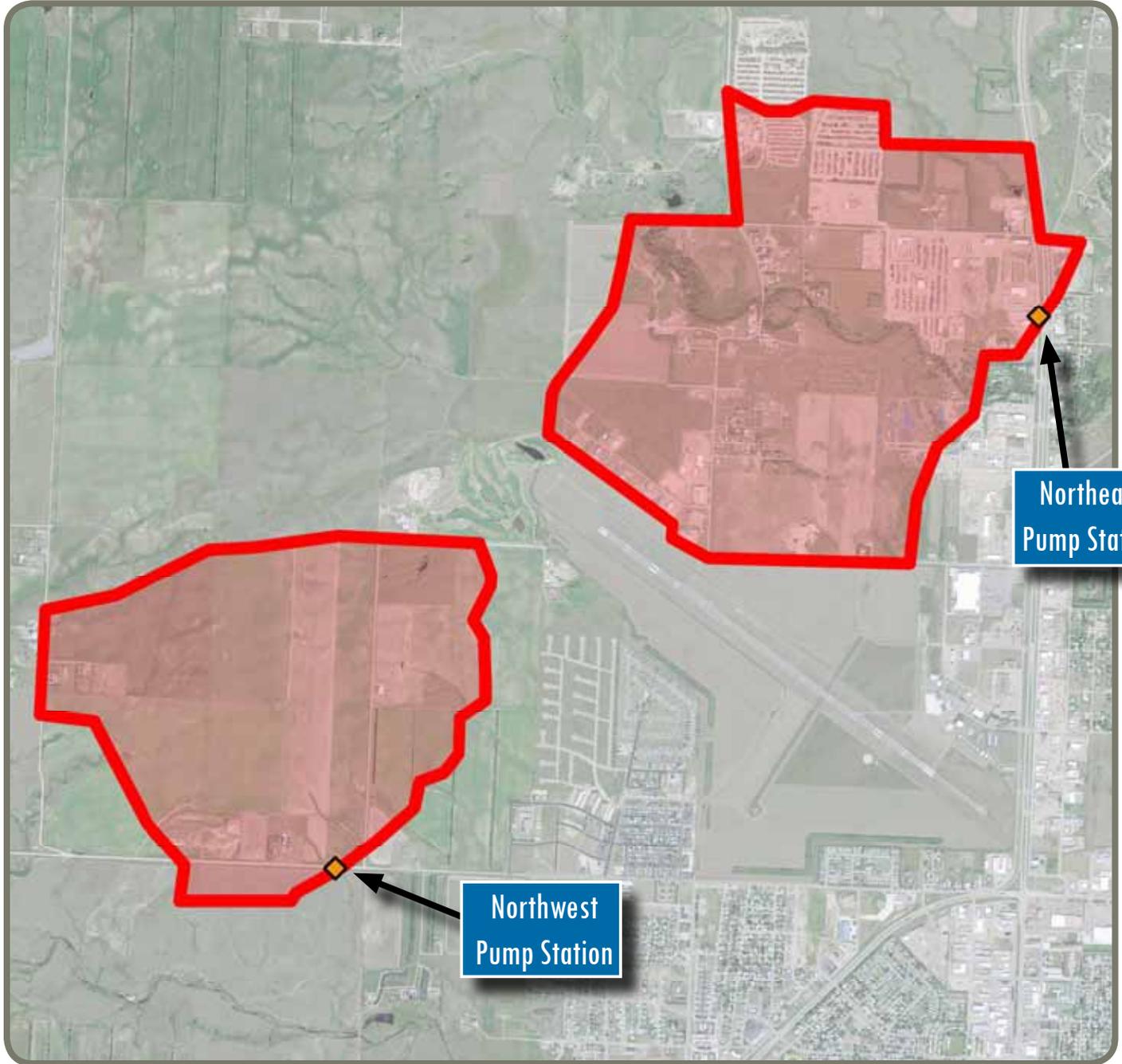
WASTEWATER | System Improvements

	Total Estimated Project Costs
Service Area A	\$747,400
Service Area B	\$545,000
Service Area C	\$1,091,000
<b>SUBTOTAL</b>	<b>\$2,383,400</b>



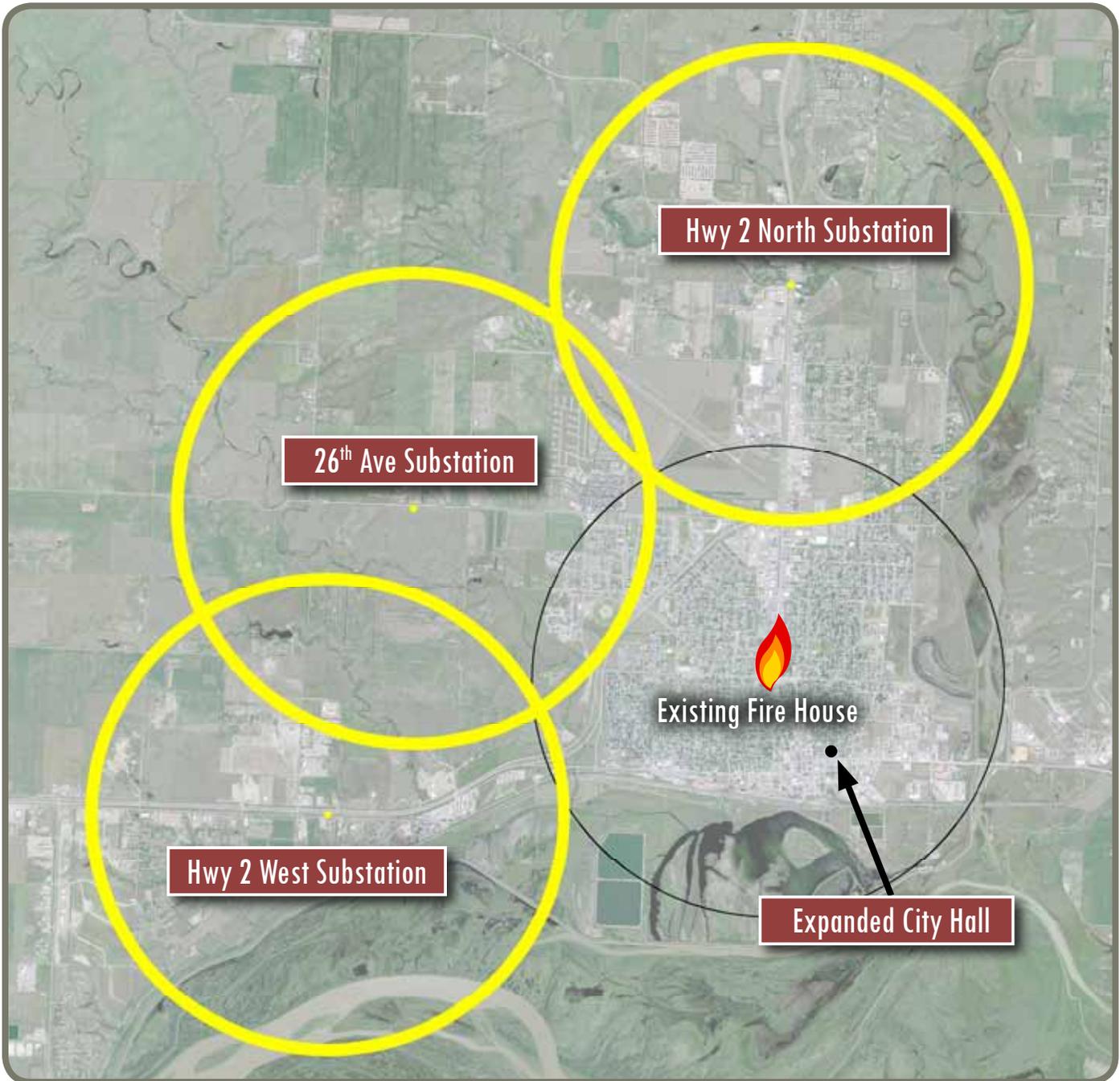
WASTEWATER | System Improvements

	Total Estimated Project Costs
Service Area D	\$2,996,000
<b>SUBTOTAL</b>	<b>\$2,996,000</b>



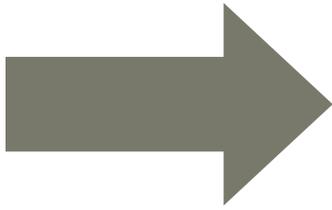
WATER | System Improvements

	Total Estimated Project Costs
<b>SUBTOTAL</b>	\$550,000



**BUILDINGS** | Emergency Response and Government Services

	Total Estimated Project Costs
<b>SUBTOTAL</b>	<b>\$16,350,000</b>

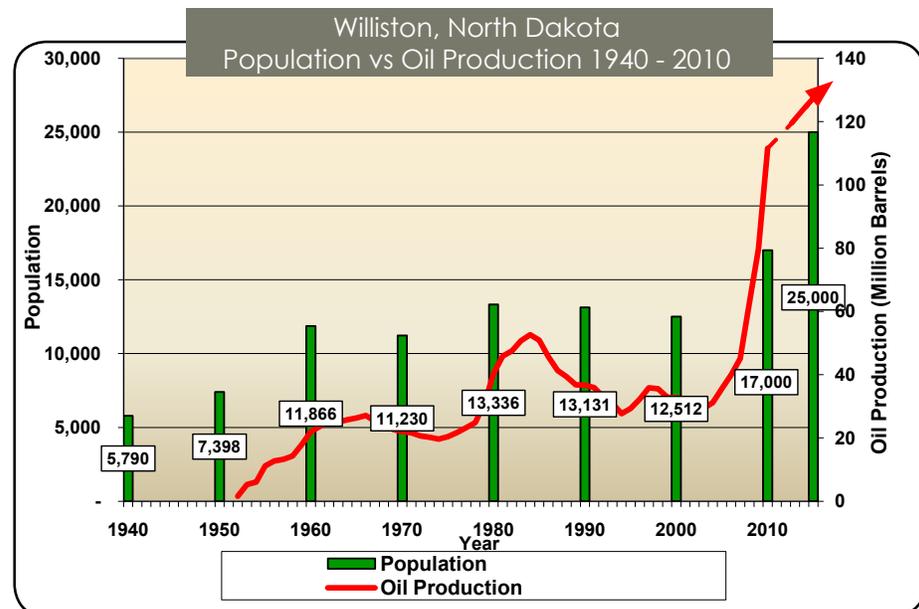
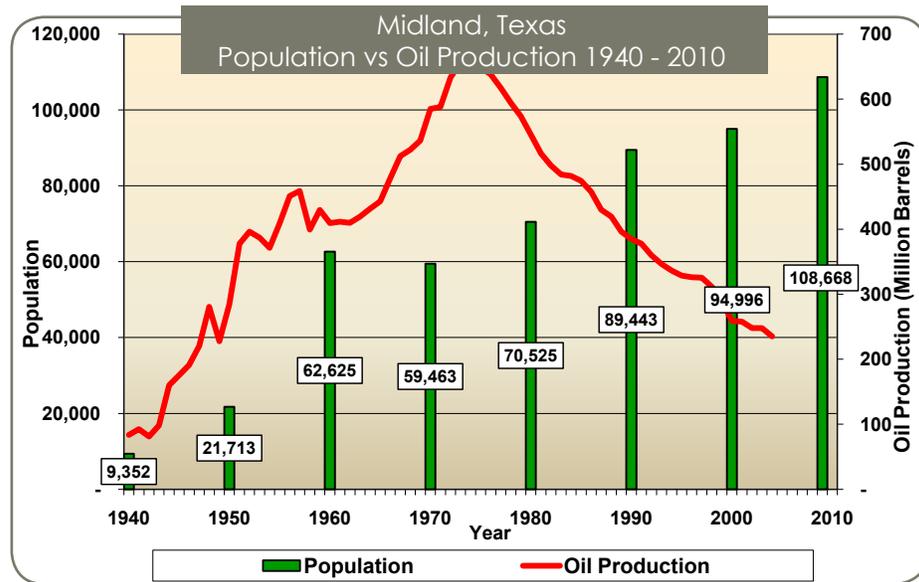


## HOW DO WE PROJECT POPULATION?

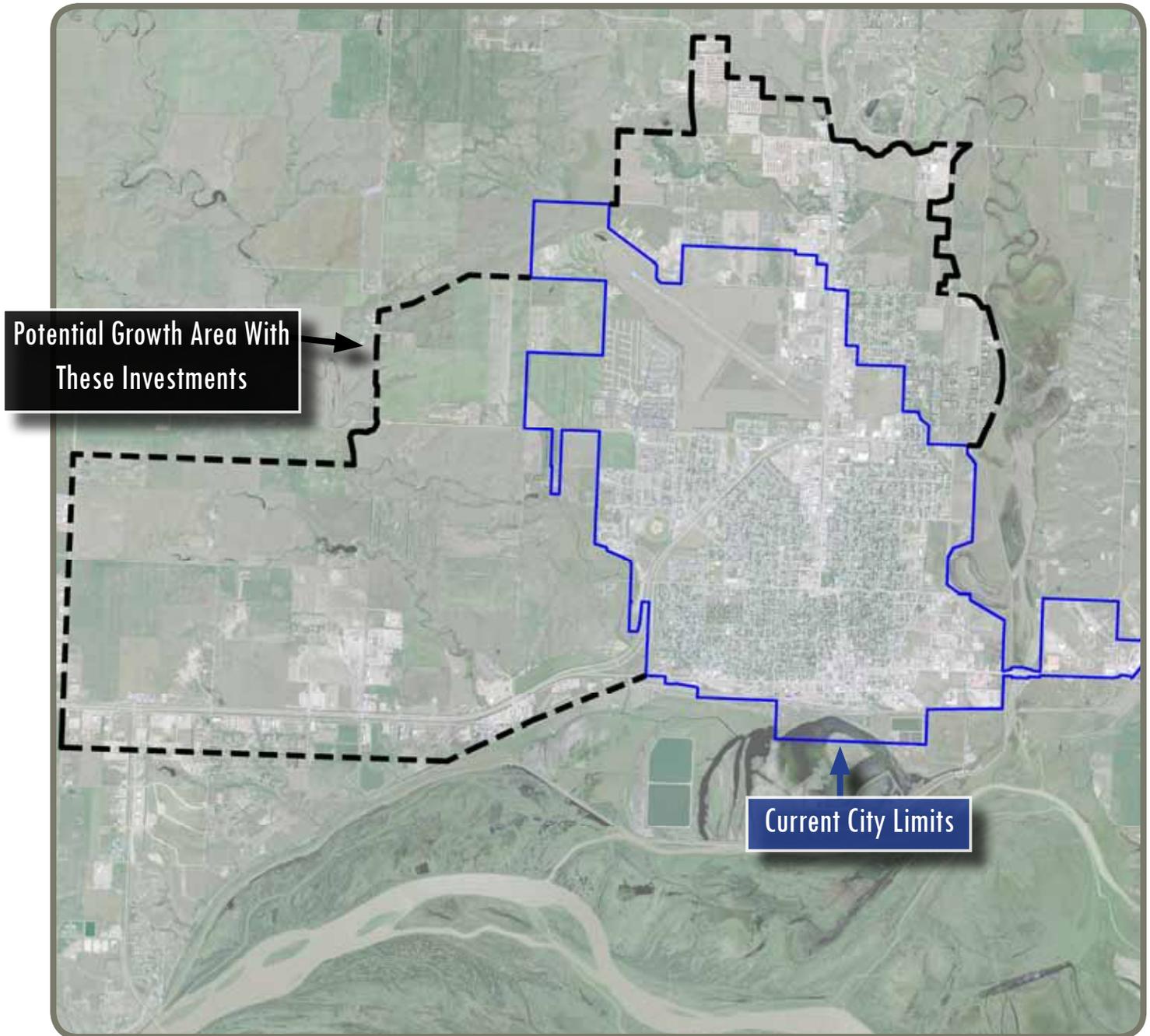
Much has been said in comparing Williston, ND to Midland, TX.

Midland, Texas is located in the heart of Texas and has been defined as a community rooted in the petroleum industry. From 1940 to 1960 the population grew from 9,352 people to 62,625 people. At this same time the oil production in the area increased from less than 100 million barrels in 1940 to nearly 400 million barrels in 1960.

Much like Midland, the City of Williston is located in the center of oil production in northwestern North Dakota and is experiencing similar growth patterns. As an economic hub, Williston is projected to continue to grow as the oil production is estimated to increase. What lies ahead for the City of Williston is unknown, but based on historical trends and oil production projections, it appears that significant growth is eminent.



WILLISTON | Projected Growth Area





# THE ROAD MAP TO SUCCESS



AE2S | 309 Washington Avenue Suite 404  
Williston, ND 58801 | 701-774-3080