

MEMO

To: Erik Wells, Town Manager
From: Matt Boulanger, Planning Director; Emily Heymann, Planner
Date: December 2, 2022
Re: **New Dwellings and Population: 5-year Outlook FY2024-2028 Predicted
Population and Commercial Growth, FY 2024-2028**



A prediction of potential growth in Williston for FY24-FY28 is contained in this memorandum. This prediction, as discussed below, is based on a combination of staff knowledge about permitted projects, typical permitting and buildout timelines, historic sewer allocation trends, market demands, trends in household size, and constraints on development created by Williston's Growth Management system.

Based on the methodology discussed below, staff's rough estimate for population growth in Williston from FY 24-FY28 is that Williston could add up to 1,200 people, growing from 10,300 people estimated at the end of FY2023 to 11,700 people at the end of FY2028, an annual growth rate of 2.3% per year. The annual rate of growth from 2010-2020 was about 1.64% per year. Staff's rough estimate of commercial growth is 311,150 SF building footprint and 562 PM peak hour trips.

This projection is based on a high projection of residential growth (assuming larger household sizes than may be created) and the fastest possible development schedule given permit requirements and assuming the fastest pace of construction Williston has experienced to date. This projection accounts for an overall shrinking household size in existing dwellings in Williston due to demographic trends as well as new residents occupying new dwellings.

Demographic Change, Shrinking Household Sizes, and Unit Types Constructed in Williston

Demographic change in the form of shrinking household sizes is ongoing in Williston and will impact total population of the town. Following Chittenden County trends, average household size is expected to decrease from 2.45 in 2020 to 2.12 in 2050. Following this trend, the existing nearly 4285 dwellings in Williston that today hold 10,300 people, might only hold 9,900 people by the end of FY2028. This projected decrease of 200 people from existing homes counters the projected increases in population from new homes.

The units under construction now and anticipated in the next five years will be smaller than the units constructed ten or more years ago. In the 1990s and 2000s, dwellings constructed in Williston were mostly single-family homes, duplexes, or condominiums with two or more bedrooms. Today, new projects are integrating smaller dwellings, including 1-bedroom units, in multifamily structures. While most new development in the growth center is multi-unit, this trend is also occurring in traditionally single-unit areas like the Residential Zoning District (RZD), where Summer Field is the first subdivision of its kind to integrate a significant number of attached units and several one-bedroom units.

The Impact of New Commercial Development

It is important to contextualize the impact of new residential growth within the total growth the town is expected to experience. New commercial buildings and sites are not subject to the same procedural delays imposed by Growth Management, so predicting five years into the future is more challenging. Based on known projects, 311,150 SF of building footprint across 51 acres is anticipated. One metric that is common to both residential and commercial development is new traffic, typically measured by PM Peak-Hour trips. All residential growth predicted through 2028 in Williston is estimated to add about 600 such trips, while commercial growth currently in the permitting process and likely to be constructed before FY 2028 will add an estimated 562 trips.

The Role of Growth Management

Williston’s Growth Management (GM) system has a target of 80 dwelling unit equivalents (DUe) per year. Applicants have significant flexibility regarding when they start a project and when they construct the units in that project. Despite year-to-year variability in buildout, the town’s experience of the average rate of new residential development, on a ten-year or longer scale, should be consistent. Some population growth in the town, including senior housing, commercial staff housing, and affordable housing at or below 80% Area Median Income, is not reflected in the Growth Management schedule, but is projected in Table 2, below.

Growth Management Demand

Williston has set a Growth Target of 80 DUe/year, and splits this “allocation” unevenly amongst three geographic areas: the Growth Center (50 DUe/year), the remaining Sewer Service Area (20 DUe/year), and the remainder of the town outside the Growth Center (10 DUe/year).

Table 1: Growth Management Demand

	Demand Level	Growth Target (DUe per fiscal year)	DUe available allocation across FY2024-2033 ¹				DUe requests March 2023 hearing	Demand Ratio (Available: Request)
			Market	Affordable	Total Available	Percent Available		
Outside Sewer Service	Very Low	10	36	13	49	100%	2	24.5:1
	<i>Two subdivisions are anticipated to seek allocation for 2 DUe in March 2023. 100% of available units across FY2024-2033 are available. Staff anticipates low demand to continue in coming years. Developing in this part of town is costly and challenging, and recent market trends increase the difficulty.</i>							
Sewer Service Area Outside Growth Center	Very High	20	15	8	23	22%	114.5	0.2:1
	<i>Five subdivisions are anticipated to seek allocation for 114.5 DUe, but the DRB can only allocate 23 DUe. It will take 4-9 years for bigger subdivisions like Summer Field (fka Catamount Golf) and Trinity Baptist Church to receive all requested allocation, assuming no more subdivisions enter the system. When many projects compete for a limited supply, no project receives full allocation in 1 cycle, and it is possible for low scoring projects to be denied allocation. The Glaser Specific Plan is requesting 25 DUe/year separate from the Growth Target but that application is still being reviewed by the Planning Commission, so it is too early to predict an outcome.</i>							
Growth Center (including Form-Based Code Overlay District)	Moderate	50	74	45	119	42%	67.5	1.8:1
	<i>Demand has been low and uncompetitive over the past few years. Finney Crossing and Cottonwood Crossing have received all requested allocation. The Annex entered the scene in 2022 when 85% of allocation was available. Looking ahead to 2023, 42% allocation is available. Form-Based Code creates new opportunity for smaller, infill projects. Staff anticipates requests of 20-70 units on a “per building” basis rather than major planned developments requesting hundreds of dwellings all at once. Staff anticipates a brief lull at first as the developer/landowner community adjusts to the new Form-Based Code, then more predictable, steady demand of allocation with Form-Based Code projects. For example, Cottonwood Crossing received its allocation in 2016, yet to date only 60 out of 209 units have been constructed. In contrast, a 31-unit building on Knight Lane received allocation in 2017 and was occupied in 2019. Lastly, units affordable at or below 80% AMI are exempt from the Growth Target and staff anticipates the creation of most Williston’s new affordable units to be in the Growth Center.</i>							

¹ DUe available only units that the DRB to allocate in the upcoming cycle. It does NOT include DUe in Growth Target that are subject to hold back provisions.

Map 1. Williston Growth Management Areas and New Dwellings created 2017-2022

In the past five years, 76% of new dwellings were built in the Growth Center.

Larger boxes indicate multi-unit buildings.

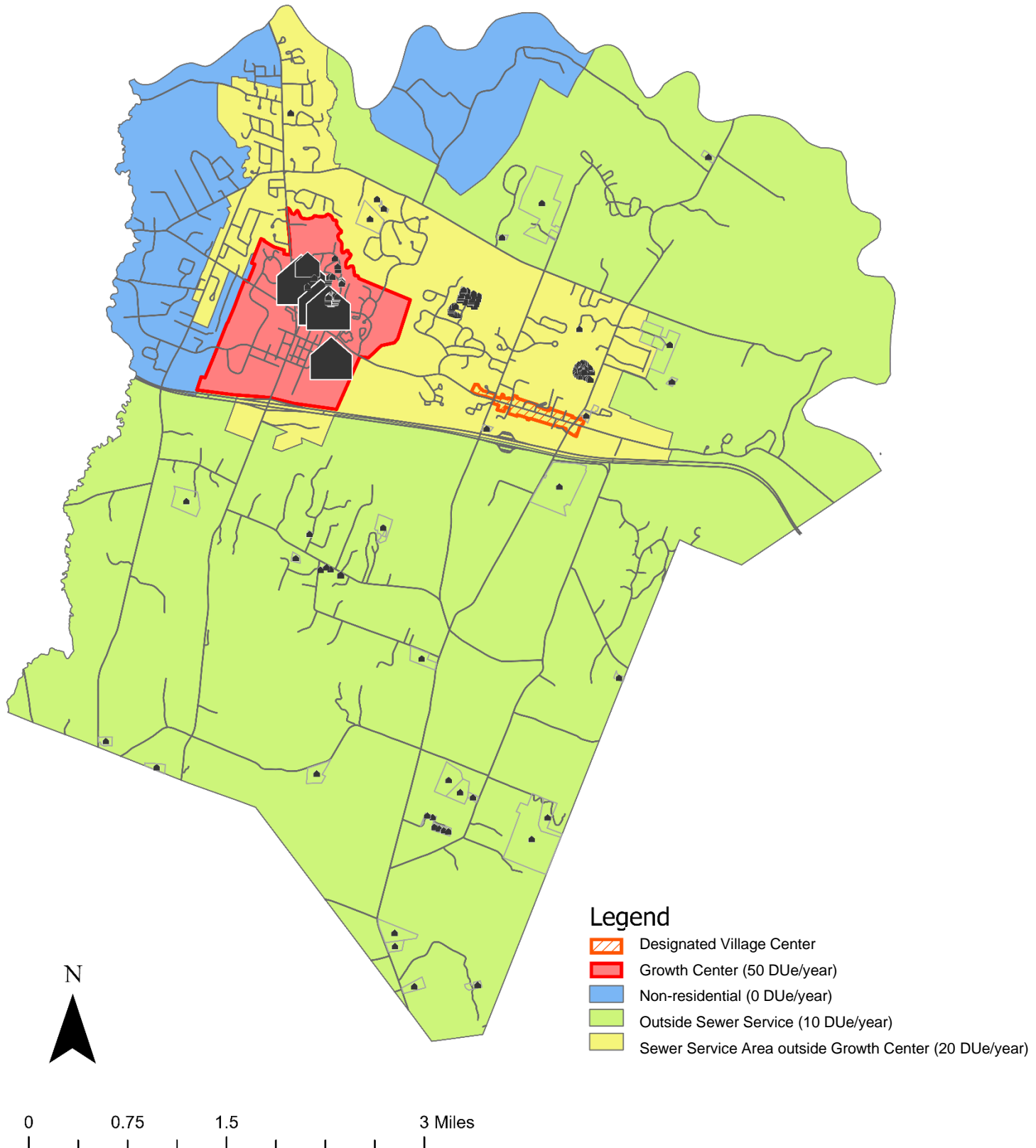


Table 2: Williston Potential Residential Build-Out and Population Increase FY 2024-FY2028

GM Area	Project Name	Total Units	Actual Units Pre- FY 2024	Estimated Units Built FY2024	Estimated Units Built FY2025	Estimated Units Built FY2026	Estimated Units Built FY2027	Estimated Units Built FY2028	Estimated Total Units FY2024 - 2028	Estimated New Residents
Growth Center (including Form-Based Code Overlay District)	Finney Crossing	587	587	0	0	0	0	0	0	0
	Finney Senior Housing	74	0	0	74	0	0	0	74	1.5/unit 111
	Cottonwood Crossing	209	60	21	0	47	47	34	149	1.75/unit 261
	Champlain Housing Trust	72	72	0	0	0	0	0	0	1.5/unit 0
	147 Knight Lane	1	1	0	0	0	0	0	0	2/unit 0
	The Annex	276	0	0	66	66	20	20	172	2/unit 344
	The Annex Senior Housing	65	0	0	0	65	0	0	65	1.5/unit 98
	Aldi Phase 2	24	0	0	0	24	0	24	24	1.75/unit 42
	TOTALS	1,308	720	21	140	202	67	78	484	856
Sewer Service Area Outside Growth Center	Glaser	100	0	0	25	25	25	25	100	2.3/unit 230
	Catamount Golf	138	0	0	10	15	15	15	55	2.3/unit 127
	Michaud	15	1	4	5	5	0	0	14	2.3/unit 32
	Trinity Baptist	58	0	0	5	10	10	10	35	2.3/unit 81
	Trinity Baptist Staff Housing	5	0	0	0	0	0	5	5	2/unit 10
	Northridge	39	31	4	4	0	0	0	8	2.3/unit 19
	Rice	20	0	0	0	2	2	2	6	2.3/unit 14
	Maguire	3	0	0	0	3	0	0	3	2.3/unit 7
	Shortsleeves	1	0	1	0	0	0	0	1	2.3/unit 2
	TOTALS	379	32	9	49	60	52	52	227	522
Outside Sewer Service Area	Brownell/ LaMarche	2	0	0	1	1	0	0	2	2.3/unit 5
	Mazuzan	1	0	1	0	0	0	0	1	2.3/unit 2
	MacDonald/ Gatta	1	0	0	0	0	1	0	1	2.3/unit 2
	Trinity Baptist	1	0	0	1	0	0	0	1	2.3/unit 2
	Boardman	1	0	0	1	0	0	0	1	2.3/unit 2
	Olson	1	0	0	1	0	0	0	1	2.3/unit 2
	TOTALS	7	0	1	4	1	1	0	7	20

GRAND TOTAL: 718 new homes and 1,398 new people added to Williston through FY 2028

Williston's Projected Non-Residential Development

This table includes projects that have completed some level of permit review. This table does not include all projects activity under construction or recently closed-out builds. This table does not predict projects that have not filed any permits with Williston. It is feasible for a project not listed here to seek permits and build out faster than something on the list.

Staff has not predicted a build-date for these projects, and instead included the year of their most recent permit approval and permit status. Unlike residential development, non-residential development is not subject to a growth management system beyond the natural constraints of the sewer ordinance. The commercial market is volatile and speculative builds have become uncommon. For example, the Robear subdivision created 8 developable lots in 2018. Lot 6 build out almost immediately whereas Lots 1 and 2 have no documented prospects.

Table 3: Williston Non-Residential Build Out

Project Name	Address	Permit Status	Date of Last Permit	Use Type	Lot Size & Building Footprint	New PM Peak-Hour Vehicle Trips
Adams Subdivision Daycare - 59 students	Lot 1 Caroline Court	Partially permitted	2019	Commercial	1.58 acres 5,500 SF	46
Blair Park Hotel – 91 rooms	34 Blair Park Road	Under construction	2020	Commercial	3.49 acres 15,000 SF	50
Robear Lot 1	Williston Road	Plat only	2018	Industrial/ Commercial	1.2 acres 13,000 SF	20
Robear Lot 2	Williston Road	Plat only	2018	Industrial/ Commercial	1.86 acres 36,600 SF	19
Robear Lot 4	Williston Road	Partially permitted	2022	Industrial/ Commercial	8.74 acres 103,750 SF	35
Robear Lot 5	Shunpike Road	Partially permitted	2022	Industrial	7.77 acres 50,000 SF	39
Aldi Grocery store	Wright Ave	Partially permitted	2021	Retail	3.3 acres 19,000 SF	205
Orthodontist Office	7921 Williston Road	Under construction	2022	Office	0.5 acres no new SF	2
Finney Crossing – Building A	Behind 31 Market Street	Partially permitted	2018	Retail/Office	0.91 acres 6,000 SF	60
Finney Crossing – Restaurant	282 Holland Lane	Under construction	2021	Retail	0.85 acres 4,300 SF	34
Cottonwood Crossing – Building A1	Cottonwood Drive	Fully permitted	2019	Commercial/ Office	2.05 acres 20,000 SF	25
Trudell Office Expansion	478 Blair Park Road	Partially permitted	2022	Office	1.75 acres 5,000 SF	11
Annex Senior Living – 65 units	Alpine Drive	Partially permitted	2022	Commercial	3 acres 22,000	16
Kia Car Dealership Addition	586 Marshall Ave	Partially permitted	2022	Retail/ Industrial	9.57 acres 5,475 SF	0
MD Motors – New Car Dealership	4626 Williston Road	Partially permitted	2022	Retail	4.47 acres 5,525 SF	TBD
GRAND TOTAL: 51.04 acres to be developed with 311,150 SF building footprint and 562 PM peak hour trips.						

Past Trends for Overall Development, 2017-2022

76% of new dwellings and 73% of new vehicle trips were created in the past 5 years were in the Growth Center. Vehicle trips and building footprint from commercial uses created outside the Growth Center are predominately in Williston’s industrial and heavy commercial zoning districts.

The 2018 Robear subdivision is a unique outlier for activity outside the Growth Center in the last 5 years. The 55-acre parcel had a single dwelling (c. 1800s) and was the largest contiguous parcel remaining in the Industrial Zoning District West with frontage on Williston and Shunpike Roads. It was subdivided into 8 buildable lots and 1 open space lot (wetlands). Of the 8 developable lots: 4 lots have been permitted & constructed (including U-Haul), 2 are undergoing permitting, and 2 remain vacant. For comparison, the Robear subdivision estimated 277 vehicle trips for all 8 lots, whereas the proposed Aldi grocery store estimated 209 trips and the 5-tenant Healthy Living building estimated 280 trips.

Permit Type	Growth Center	Village Center	Outside Growth & Village Centers	Total in Williston	Percent in Growth Center
Dwelling Units (total)	366	2	113	481	76%
Enterprises	18	2	21	41	44%
Subdivisions	12	0	16	28	43%

	Number of New Enterprises	Vehicle Trips ¹	Finished Floor Area (SF)	New Building Footprint (SF)
Growth Center	18 (44%)	754 (73%)	221,442 (38%)	132,280 (30%)
Village Center	2 (5%)	2 (0.2%)	4,400 (1%)	0 (0%)
Everywhere Else	21 (51%)	275 (27%)	356,998 (61%)	309,381 (70%)
Total	41	1,031	582,840	441,661

¹ PM Peak Hour Trips between 4-6 pm. Derived from Impact Fee payments.