

## MEMORANDUM

To: Erik Wells, Town Manager  
From: Matt Boulanger, Planning Director; Emily Heymann, Planner  
Date: November 19, 2024  
Re: **New Homes and People:**  
**5-year Outlook- Predicted Residential and Commercial Growth FY26-FY30**

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This memorandum contains predictions of potential growth in Williston for FY26-FY30 based on a combination of staff knowledge about permitted projects, typical permitting and buildout timelines, trends in household size, and constraints on development created by Williston's permitting timeframes, Growth Management rules, and Sewer Allocation system.

### **Estimate for Growth<sup>1</sup> in Williston from FY26-FY30**

- ***Williston could add up to 783 homes and 1,384 people, growing from 10,400 people estimated at the beginning of FY2026 to 11,784 people at the end of FY2030, an annual growth rate of about 1.7%. Per the 2020 Decennial Census, the annual rate of growth from 2010-2020 was about 1.64%.***
- ***Estimated commercial growth for FY 26-30 is about 300,000 SF building footprint and 430 PM peak-hour trips. These two metrics are discussed further below.***

### **Past Predictions Have Overestimated the Volume and Pace of Growth**

Staff's past predictions, made in November of 2021 2022, and 2023 have been overly optimistic using the same methodology, with growth falling short of predictions. In 2021, for example, this memorandum predicted that 200 homes would be constructed in FY23, but only 38 were built. Similarly, the 2022 prediction for FY24 was 172 homes, where only 60 were built. As of this writing, nearly halfway through FY 25, only 2 homes were started where last year's report predicted 10.

### **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 number of residents in 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 4,333 dwellings in Williston that today hold 10,400 people, might only hold 10,185 people by the end of FY2030. This projected decrease of over 200 people from existing homes counters the projected increases from new homes.

The homes under construction now and anticipated in the next five years will be smaller than those constructed ten or more years ago. In the 1990s and 2000s, dwellings constructed in Williston were mostly single-unit homes, duplexes, or condominiums with two or more bedrooms. Today, new projects are integrating smaller dwellings, including 1-bedroom and studio apartments in multifamily structures. While most new development in the Taft Corners Growth Center is multi-unit, this trend is also occurring in traditionally single-unit areas like the Residential Zoning District (RZD).

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<sup>1</sup> ***Past projections using this same methodology have overestimated growth. This projection is based on a high projection of growth. It assumes larger household sizes than may be created, the fastest possible development schedule given permit requirements, and the fastest pace of construction Williston has experienced to date. This projection (a net gain of 1159 people) accounts for an overall shrinking household size in existing dwellings in Williston due to demographic trends (a loss of 215 people by FY2030) as well as new residents occupying new dwellings (A gain of 1384 people).***

### The Role of Growth Management

Williston’s Growth Management (GM) system has a target of 80 dwellings per year. Applicants have significant flexibility regarding when they start a project and when they construct the units in that project. Senior housing, small projects (≤4 dwellings), and projects that meet Williston’s Inclusionary Zoning provisions are not reflected in the Growth Management schedule, but are projected in Table 2, below.

### Growth Management Demand

Williston has set a Growth Target of 80 dwellings, and splits this “allocation” unevenly amongst three geographic areas: the Growth Center (50/year), the remaining Sewer Service Area (20/year), and the remainder of the Town outside the Sewer Service Area (10/year). Demand is very high in the Sewer Service Area outside the Growth Center considering the “supply” of 20 dwellings per year allowed there.

### Inclusionary Zoning, Specific Plans, and Sewer Capacity

While there are other paths to residential approval available that do not require allocation in the Growth Management System, all new developments in Williston that will connect to Town sewer must purchase sewer treatment capacity from the amount made available by the Selectboard in Attachment A to the Sewer Allocation Ordinance each year. This constraint will continue to limit the overall pace of all new development in Williston.

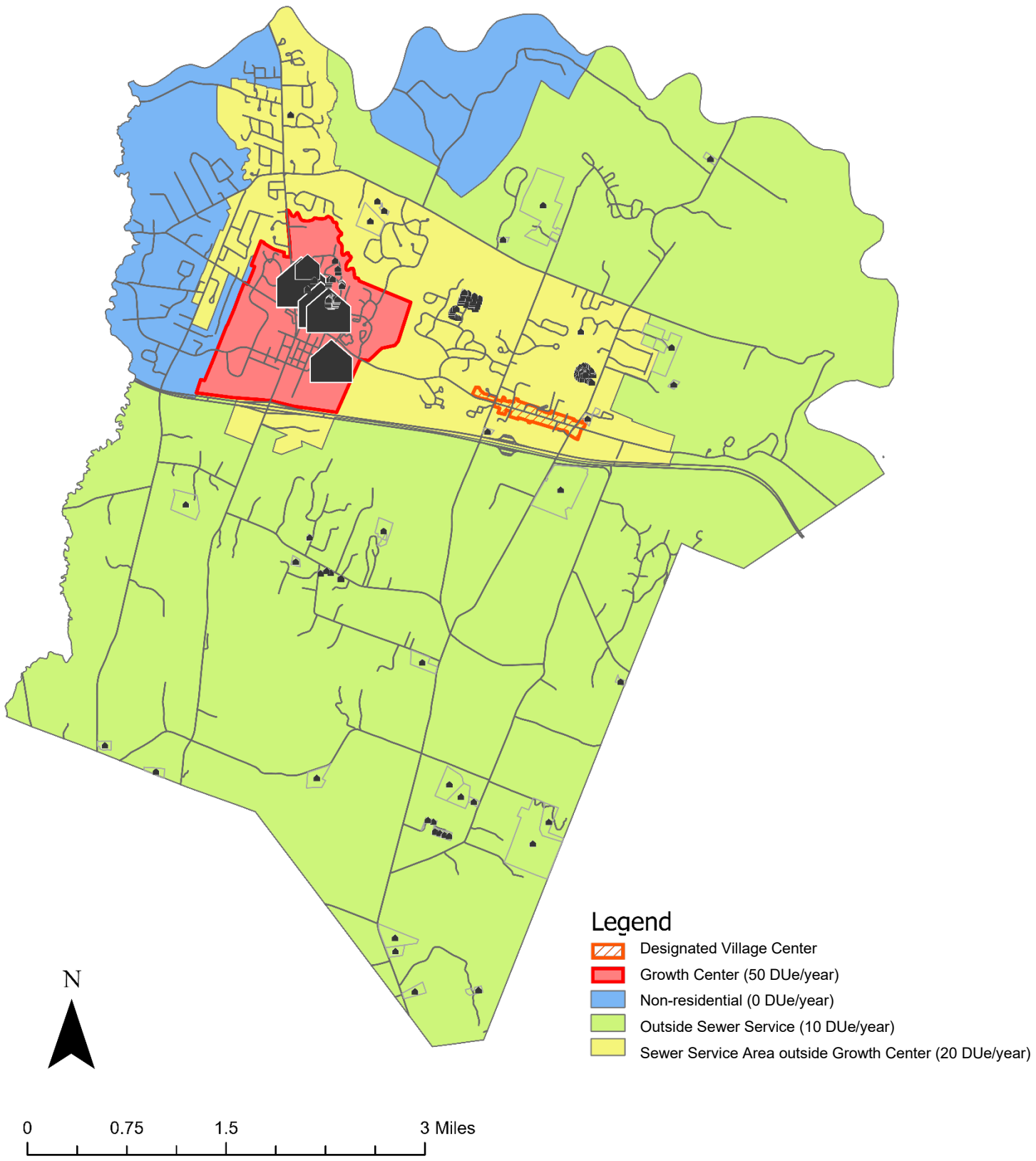
**Table 1: Growth Management Demand**

	Demand Level	Growth Target (dwellings per fiscal year)		Available allocation across FY2026-2034			Requests Expected in March 2025 <sup>2</sup>	Percentage of Available Allocation Requested
		Per Fiscal Year	10-year Total	Allocated	Eligible in 2025 <sup>1</sup>	Percent Available <sup>1</sup>		
Outside Sewer Service	Very Low	10	100	0	57	100%	8	14%
	<i>One project (8 dwellings total) will seek allocation in March 2025. 100% of available units across FY2026-2034 are available. Low demand has been the trend for several years and staff anticipate low demand 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	Low	20	200	71	44	38%	0	N/A (0/44=0)
	<i>No projects are anticipated or eligible to receive allocation in this area. Summer Field (DP 20-18) received the last of its allocation in March 2024, Glaser Specific Plan (DP 24-06) has its own allocation schedule, and McCullough (DP 24-08) is expected to pursue Inclusionary Zoning when it files a discretionary permit application.</i>							
Growth Center (including Form-Based Code Overlay District)	Low	50	500	165	122	43%	0 <sup>2</sup>	58%
	<i>No projects are anticipated to receive allocation in this area. The Annex (DP 21-18) received the last of its allocation in March 2024. The Annex could seek an amendment to increase the total unit count, but not likely given the Density Bonus and Inclusionary Zoning standards would be required.</i>							

<sup>1</sup> DU available is based upon allocated & units eligible for allocation in upcoming DRB hearing. It does NOT include DU in Growth Target that are subject to hold back provisions.

<sup>2</sup> Projects within the Form-Based Code Overlay District are included in the demand calculation, though they may receive allocation from the Zoning Administrator at any time during the cycle.

**Map 1. Williston Growth Management Areas and New Dwellings created 2017-2023**  
76% of new dwellings were built in the Growth Center. Larger boxes indicate multi-unit buildings.



**Table 2: Williston Potential Residential Build-Out FY 2025-FY2029**

GM Area	Project Name	Total Units	Homes Pre-FY2026	Estimated Year Home is Occupied					Estimated Total Homes FY2026-2030	Estimated Residents in New Homes
				FY2026	FY2027	FY2028	FY2029	FY2030		
Growth Center (including Form-Based Code Overlay District)	Finney Crossing (post-FBC)	38	38	0	0	0	0	0	<b>38</b>	1.75/unit 70
	Cottonwood Crossing	209	81	0	0	47	47	47	<b>141</b>	1.75/unit 247
	The Annex	276	0	66	66	35	35	35	<b>237</b>	1.75/unit 415
	The Annex Senior Housing	65	0	0	0	65	0	0	<b>65</b>	1.5/unit 98
	Aldi Phase 2	24	0	0	0	0	0	24	<b>24</b>	1.75/unit 42
	3JT Mixed-Use	59	0	0	0	59	0	0	<b>59</b>	1.75/unit 104
	<b>TOTALS</b>	<b>671</b>	<b>81</b>	<b>66</b>	<b>66</b>	<b>206</b>	<b>82</b>	<b>106</b>	<b>607</b>	<b>976</b>
Sewer Service Area Outside Growth Center	Glaser Specific Plan	109	0	0	18	18	18	18	<b>54</b>	2.5/unit 135
	Summer Field	141	0	10	15	15	15	15	<b>55</b>	2.5/unit 135
	McCullough	38	0	0	5	5	23	15	<b>34</b>	1.75/unit 60
	Michaud, Sally's Way	14	0	0	4	5	5	5	<b>14</b>	2.5/unit 35
	Allaire	2	0	0	2	0	0	0		2/unit 4
	<b>TOTALS</b>	<b>304</b>	<b>0</b>	<b>10</b>	<b>44</b>	<b>45</b>	<b>61</b>	<b>53</b>	<b>161</b>	<b>369</b>
Outside Sewer Service Area	Trinity Baptist	2	0	0	0	1	1	0	<b>2</b>	2.5/unit 5
	Boardman	1	0	1	0	0	0	0	<b>1</b>	2.5/unit 3
	Olson	1	0	1	0	0	0	0	<b>1</b>	2.5/unit 3
	Fournier	2	0	0	1	1	0	0	<b>2</b>	2.5/unit 5
	Willard	2	0	1	1	0	0	0	<b>2</b>	2.5/unit 5
	Benedetto	2	0	0	1	1	0	0	<b>2</b>	2.5/unit 5
	Marcotte	9	0	0	0	1	2	2	<b>5</b>	2.5/unit 13
	<b>TOTALS</b>	<b>19</b>	<b>0</b>			<b>40</b>			<b>15</b>	<b>39</b>

**GRAND TOTAL: 783 New Homes, 1,165 new PM Peak-Hour Trips, and 1,384 New Residents, FY 2026-2030**

## Williston’s Projected Non-Residential Development

### 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. Based on known projects, 295,825 SF of building footprint across 42 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 FY30 in Williston is estimated to add about 1,165 such trips, while commercial growth currently in the permitting process and likely to be constructed before FY 2030 will add an estimated 485 trips.

This table includes projects that have begun permit review and whose approvals have not expired.

Staff has not predicted a build-date for these projects, and instead included the year of their most recent permit approval and permit status. The commercial market is volatile and speculative builds have become uncommon.

**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
<b>Finney Crossing Hotel 2</b>	281 Holland Lane	Under construction	2023	Commercial	1.9 acres 15,000 SF	55
<b>Robear Lot 1</b>	Williston Road	Plat only	2018	Industrial/ Commercial	1.2 acres 13,000 SF	20
<b>U-Haul Expansion Robear Lot 2</b>	5010 Williston Road	Under construction	2023	Industrial/ Commercial	1.86 acres 36,600 SF	19
<b>GPA LLC – Industrial Spec building Robear Lot 4</b>	Williston Road	Under construction	2023	Industrial/ Commercial	8.74 acres 103,750 SF	35
<b>Robear Lot 5</b>	Shunpike Road	Partially permitted	2022	Industrial	7.77 acres 50,000 SF	39
<b>Aldi Grocery store</b>	Wright Ave	Partially permitted	2021	Retail	3.3 acres 19,000 SF	205
<b>Finney Crossing – Building A</b>	Behind 31 Market Street	Partially permitted	2018	Retail/Office	0.91 acres 6,000 SF	60
<b>Cottonwood Crossing – Building A1</b>	Cottonwood Drive	Must renew; permit expired	2019	Commercial/ Office	2.05 acres 20,000 SF	25
<b>Trudell Office Expansion</b>	478 Blair Park Road	Partially permitted	2022	Office	1.75 acres 5,000 SF	11
<b>Annex Senior Living – 65 units</b>	Alpine Drive	Partially permitted	2022	Commercial	3 acres 22,000	16
<b>Kia Car Dealership Addition</b>	586 Marshall Ave	Partially permitted	2022	Retail/ Industrial	9.57 acres 5,475 SF	0
<b>GRAND TOTAL: 42 acres to be developed with 295,825 SF building footprint and 485 new PM peak hour trips.</b>						