



QUALITY-OF-LIFE STRATEGIC EVENT FACILITY DEVELOPMENT AND IMPLEMENTATION STUDY

In Williams County, North Dakota

February 2, 2024



EXECUTIVE SUMMARY



EXECUTIVE SUMMARY: Background & Objectives

Conventions, Sports & Leisure International (CSL), working in collaboration with Convergence Design (Convergence), was retained by Williams County to conduct a strategic event facility development and implementation study to enhance the quality-of-life in Williams County, North Dakota. This report outlines the key research and findings associated with the strategic event facility development and implementation analysis and is intended to assist Williams County and other key stakeholders in evaluating the market opportunity to develop new/enhanced quality-of-life offerings, including youth/amateur sports, meeting/banquet/event, concert/entertainment and/or tourism/experiential facility products. The effort included detailed research and analysis of local market characteristics, competitive facilities, comparable facilities, industry trends, surveys/interviews with event planners and promoters, analysis of program and scenarios, and projections of utilization, financial operations, and economic impacts associated with the proposed development scenarios. The study results detailed herein consisted of extensive research and analysis, including a comprehensive set of market-specific information derived from the following:

- **PROJECT EXPERIENCE:** Experience garnered through more than 1,000 convention/conference, hotel, exposition, sports, entertainment, and other event and hospitality facility planning and benchmarking projects in communities of all sizes throughout the country.
- **SITE VISIT:** Completed a site visit and tours of Williams County quality-of-life facilities, as well as meetings with County leadership, quality-of-life facility operators and stakeholders, leadership from various County-wide municipalities and other community stakeholders.
- **LOCAL MARKET ASSESSMENT:** Review of the current and evolving market conditions of Williams County and the surrounding regional area, along with an inventory and evaluation of the existing quality-of-life facility offerings in each.
- **COMPARABLE MARKET BENCHMARKING:** Identified 15 regional markets with demographic and socioeconomic characteristics comparable to Williams County. Intent is to provide specific direction regarding facility inventory availability in similar/comparable markets and what potential development opportunities are worthy of further consideration.



EXECUTIVE SUMMARY: Background & Objectives

- **POTENTIAL DEVELOPMENT OPTIONS:** Analysis of multipurpose equestrian/livestock event complex, indoor ice sheet complex, indoor turf facility and enhanced meeting/event facility development opportunities in Williams County included detailed research on the following:
 - **COMPETITIVE FACILITY INVENTORY:** Inventory of markets offering facility products that could potentially compete for event activity with new/improved facilities in Williston/Williams County.
 - **INDUSTRY TRENDS:** Evaluation of macroeconomic trends among identified potential facility development options as well as insight into emerging market trends relative to the design and operations of these facilities.
 - **MARKET SURVEYS AND OUTREACH:** Detailed telephone surveys were completed with organizations representing potential user groups of the identified facility development options. Conversations with more than 70 individuals representing hundreds of annually recurring events.
- **DEVELOPMENT RECOMMENDATIONS:** Each of the potential development options were evaluated to provide market supportable recommendations for targeted facility development opportunities. Each of the concepts were evaluated based on their marketability and feasibility if they were to be developed in Williston/Williams County. Key metrics considered for each concept include supply and demand conditions in the region, their local and non-local visitor draw, their appeal to families and adults, and their associated construction/operating costs and economic benefits.



EXECUTIVE SUMMARY: Summary of Williston Area Conclusions

YOUTH/AMATEUR SPORTS

Aquatics



- Market indicated demand for privately funded, publicly operated aquatic center.
- Revenue goals estimated to require between 26,000 and 31,000 annual daily users and between 2,000 and 2,500 annual memberships.

Rectangle Fields



- Limited non-local demand.
- Moderate demand for additional full-sized rectangle field.
- Continued investment in access to practice and game fields to address growing community.

Diamond Fields



- Moderate non-local demand.
- Moderate demand for additional 12u diamond fields.
- Continued investment in field quality is critical to maintain non-local tournament activity.

Ice Sheets



- Moderate non-local demand.
- Moderate to strong local demand for improved ice facilities.
- Market demand indicated for development of a two-sheet complex.

Indoor Courts



- Limited non-local demand
- Local demand largely accommodated by current court inventory.
- Additional indoor court investment not needed at this time.

Indoor Turf



- Limited non-local demand.
- Moderate to strong local demand for improved indoor turf facilities.
- Market demand indicated for development of a dedicated indoor turf complex.

Multipurpose Dirt Arena



- Moderate non-local demand for multi-purpose event space.
- Moderate to strong local demand for improved multi-purpose event space.
- Market demand indicated for indoor multipurpose event space.

MEETINGS/EVENTS



- State/regional association, tradeshow, and other meeting and event planners indicate that existing event space in Williston can sufficiently accommodate the majority of their events with potential interest in rotating to the market.
- Potential investment needed to maintain/enhance existing event facilities and improve market outreach.
- Potential investment in incentives to attract new events to the market.

CONCERTS/ENT.



- Williston and greater Williams County market: limited population impacts potential opportunity to host significant concerts and touring shows within a purpose-built entertainment facility.
- Venues such as the Raymond Center, the Well at WSC, the ARC and others have provided space for hosting concerts/entertainment events, but lack of date availability and physical constraints have limited attractiveness for patrons, artists and producers.
- Potential opportunity to develop dedicated indoor and/or outdoor entertainment space.

EXECUTIVE SUMMARY: Development Prioritization Score


AMATEUR
SPORTS
FACILITIES

	Supply (high supply = low score)		Demand (high demand = high score)		Geographic Market (strong market = high score)		Demographic Suitability (strong demographics = high score)		Cost/Benefit (low cost = high score) (high impact = high score)			TOTAL SCORE
	Local	Regional	Local	Regional	Local Amenity	Tourism Draw	Family	Adults	Cost Recovery Potential	Project Cost	Economic Impact Potential	
Outdoor Rectangle Facility	4	2	3	2	4	2	5	3	3	2	4	34
Outdoor Diamond Facility	4	2	3	4	4	4	5	3	3	1	5	38
Indoor Ice Sheet Facility	3	3	5	4	5	4	5	3	1	1	3	37
Indoor Court Facility	1	4	3	3	4	3	5	3	3	1	4	34
Indoor Turf Facility	4	5	5	2	5	5	5	2	3	2	2	40
Outdoor Aquatic Facility	5	5	5	1	5	1	5	2	1	3	1	34


FACILITIES
EVENT

Equestrian/Livestock Facility	3	5	4	4	4	4	5	4	2	2	5	42
Convention Center	1	2	3	2	3	5	1	4	1	1	5	28
Improved Hotel/Conf. Center	3	4	2	3	3	4	1	4	4	3	4	35
Amphitheater	1	5	4	3	4	4	3	4	2	2	4	36
Multipurpose Music Venue	3	3	3	3	5	4	3	5	3	3	3	38

EXECUTIVE SUMMARY: Facility Development Recommendations

Based on the market analysis for meetings/event, concerts/entertainment, youth/amateur sports and equestrian/livestock show facilities in Williams County and conversation with community stakeholders, the following development opportunities have been identified for further consideration:

FACILITY DEVELOPMENT

MULTIPURPOSE EQUESTRIAN/LIVESTOCK EVENT CENTER

- Enclosed and conditioned primary show ring approximating 125'x250' (32,500 SF) with minimum of 1,000 seats.
- Flexibility to expand to 4,000-seat capacity for concerts/entertainment events and retract seats to create 32,500-square foot space for flat floor events.
- Secondary/warm-up ring enclosed (HVAC optional) targeting 100'x200' (20,000 SF).
- Multipurpose enclosed (HVAC optional) stall barn connected to Main Arena and Warm-up Arena capable of accommodating 150 portable stalls.
- Minimum of 50 RV hook-ups with water, 50amp electrical service and access to dump stations.

AG EXTENSION AND EDUCATION CENTER

- NDSU Extension, 4-H and FFA programs serve hundreds of youth (more than 300 youth in 4-H alone) with limited facilities, education and office space.
- Potential exists to accommodate this demand with approximately 6,000 square feet of sub-divisible meeting space (three rooms of approximately 2,000 SF each), 2,000 square feet of office space and a 1,000-square foot full-service kitchen.
- Lab space for agricultural sampling with sufficient ventilation and utility supply to accommodate testing and other educational activities.
- Crop and range plots, arboretum, community gardens and other arable land.

INDOOR ICE SHEET COMPLEX

- Two (2) NHL-size indoor ice sheets (200'x85') with seating for up to 1,500 spectators at primary rink and approximately 500 at secondary rink.
- Potential third ice sheet within covered outdoor rink connected to two indoor rinks offering seating for up to 1,000 spectators.
- Minimum of four (4) locker rooms per rink (twelve locker rooms total).
- Concessions and hospitality space, pro-shop, office space, referee rooms, dryland training space, storage and other support space.

INDOOR TURF FACILITY

- One (1) regulation-size indoor synthetic turf field (200'x85').
- Dropdown nets to separate turf space into three spaces, with space for temporary bleacher seating.
- Team rooms/party rooms, concessions and hospitality space.

EXECUTIVE SUMMARY: Full Build-Out Cost Estimates

Based on the outlined development alternatives, the following order-of-magnitude cost estimates were generated using industry per-unit data adjusted for conditions in Williams County and cost data of comparable event facilities, modified for time and locations.

Many variables exist that influence actual realized construction costs, including type of facility (facilities), size, components, level of finish, integrated amenities, costs of goods and services in the local market, location and topography of the site, ingress/egress issues, and other such aspects. Detailed architectural concept, design and costing study would be required to specifically estimate construction costs for any event facility development realized in Williams County.

As shown, should all purpose-built facilities be developed, the total estimated development cost would approximate \$235.3 million. Opportunities to mitigate some of these capital investments through development of multipurpose event facilities is discussed on the following pages.

Facility Component	Hard Const Costs (2023\$)	Soft Const Costs (2023\$)	Total Const Costs (2023\$)
Equestrian/Livestock Event Center	\$41,600,000	\$10,400,000	\$52,000,000
Multipurpose Stall Barn	\$3,800,000	\$1,000,000	\$4,800,000
UMVF Supporting Infrastructure			
Surface Parking	\$4,000,000	\$1,000,000	\$5,000,000
Midway	\$1,600,000	\$400,000	\$2,000,000
Sitework/Utility Allowance	\$5,000,000	\$1,300,000	\$6,300,000
UMVF Supporting Infrastructure Total	\$10,600,000	\$2,700,000	\$13,300,000
Ag Extension & Education Center	\$6,600,000	\$1,700,000	\$8,300,000
Multi-Sheet Ice Complex			
Primary Year-Round Sheet (The Hangar)	\$17,100,000	\$4,300,000	\$21,400,000
Secondary Seasonal Sheet	\$23,100,000	\$5,800,000	\$28,900,000
Covered Outdoor Sheet	\$12,800,000	\$3,200,000	\$16,000,000
Multi-Sheet Ice Complex Total	\$53,000,000	\$13,300,000	\$66,300,000
Multipurpose Arena/Event Center	\$50,000,000	\$12,500,000	\$62,500,000
Williston Square Supporting Infrastructure			
Civic Plaza	\$3,400,000	\$900,000	\$4,300,000
Surface Parking	\$4,000,000	\$1,000,000	\$5,000,000
Sitework/Utility Allowance	\$5,000,000	\$1,300,000	\$6,300,000
Williston Square Supporting Infrastructure Total	\$12,400,000	\$3,200,000	\$15,600,000
Raymond Center Renovation (Turf Complex)	\$10,000,000	\$2,500,000	\$12,500,000
TOTAL PURPOSE-BUILT SCENARIO COST	\$188,000,000	\$47,300,000	\$235,300,000

EXECUTIVE SUMMARY: UMVF Facility Development Scenarios

Based on the market analysis for meetings/event, concerts/entertainment, youth/amateur sports and equestrian/livestock show facilities in Williams County, the following development opportunities have been identified for further consideration.

EQUESTRIAN/LIVESTOCK FACILITIES AT UMVF

- Multipurpose Equestrian/Livestock Event Center with primary show ring of 125'x250'.
 - Concrete floor and flexible seating design.
 - Fixed seating for 1,000 for dirt events.
 - Expandable to 4,000 capacity with floor seating for concerts/entertainment.
 - 30,000 SF floor for flat floor events.
 - Indoor stall barn (30,000 SF).
 - Capacity for 150 portable stalls.
 - Alternate set-up could accommodate a 100'x150' show ring and 75 portable stalls.
 - Enclosed warm-up ring 100'x200'.
- Ag Extension & Education facility:
 - 6,000 square feet of meeting space.
 - 2,000 square feet of office space.
 - Full-service kitchen.
 - Testing lab.
- Upgraded Midway space for UMVF.
- Surface parking for event attendees, equestrian/livestock trailers and RV hook-ups.

ICE FACILITIES AT WILLISTON SQUARE

- Indoor multi-sheet ice complex:
 - One dedicated year-round ice sheet with seating for 1,000.
 - Seasonal ice sheet with seating for 500.
 - Seasonal covered outdoor refrigerated ice sheet with seating for 500.
- Development options include:
 - Purpose-Built Option:
 - Re-purpose The Hangar for dedicated year-round ice sheet with additional sheets west of The Hangar.
 - Multipurpose Option:
 - Assumes future development of Multipurpose Arena/Event Center.
 - Develop sheets west of Event Center:
 - Seasonal Ice Sheet (eventually) attached to Arena/Event Center – converts to indoor flat floor space April through August with year-round ice sheet attached to Seasonal Ice Sheet.
 - Seasonal Covered Outdoor ice sheet attached to Year-Round ice sheet, overlooking Great Lawn space.

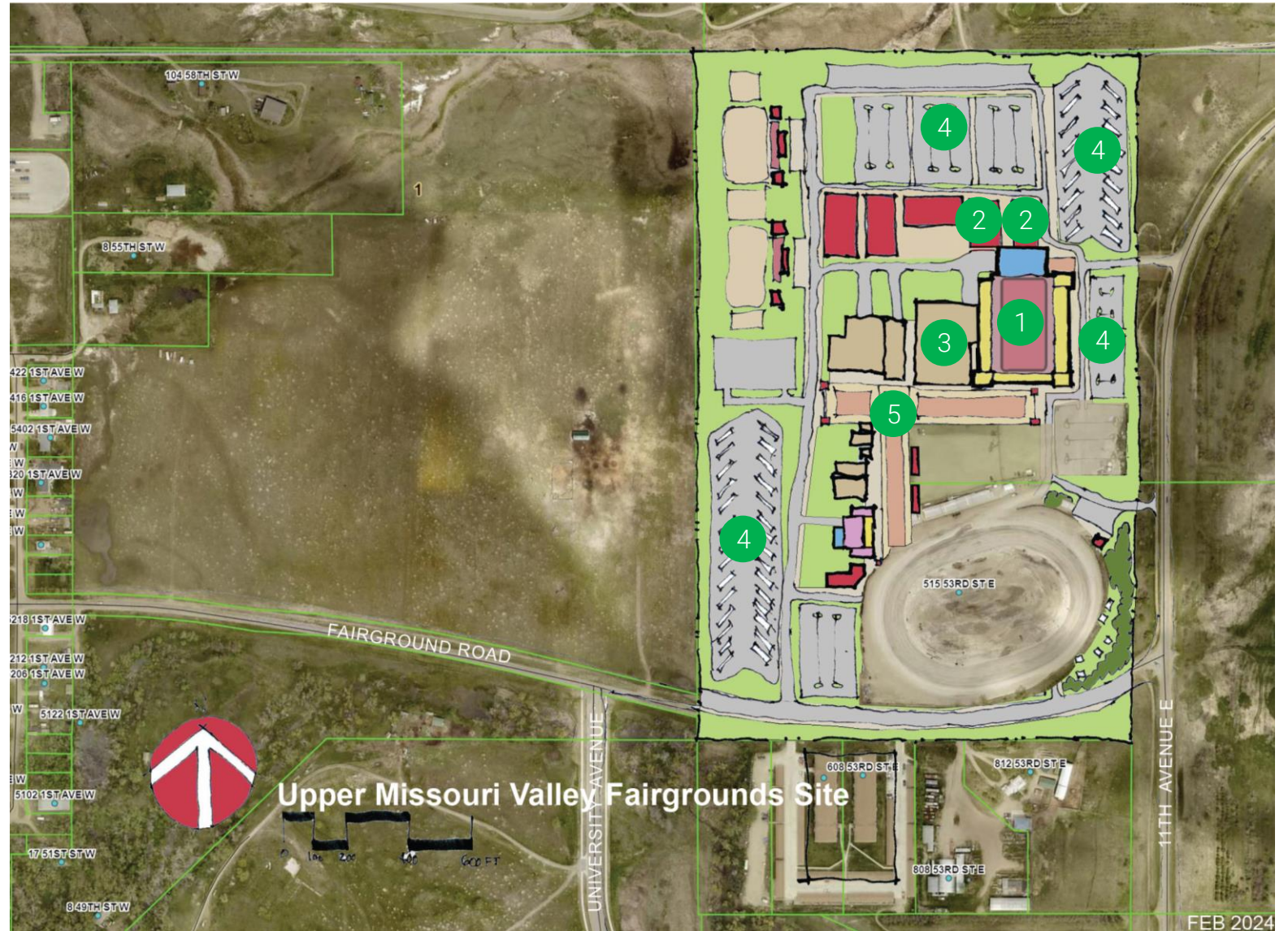
CONTINUED/FUTURE DEVELOPMENT

- Multipurpose Arena/Event Center:
 - Fixed and retractable seating with maximum concert capacity of approximately 4,000.
 - Civic Plaza space to maximize activation.
 - Dependent on developing book-of-business including concerts, entertainment events, flat floor shows, sports events, etc.
- Convert Raymond Center to indoor turf complex.
 - Regulation-size indoor synthetic turf field.
 - Dropdown nets to separate turf space into three spaces.
 - Temporary bleacher seating.
 - Dependent on development of ice sheets to accommodate demand and multipurpose event space to accommodate concerts, entertainment and large flat floor events.

EXECUTIVE SUMMARY: UMVF Facility Development Scenarios A & B

- 1** Equestrian/Livestock Event Center:
 - Year-round dirt floor with concrete base.
 - Bleacher seating on one side for up to 1,000.
 - Expandable to 4,000 capacity with floor seating for concerts/entertainment.
- 2** Multipurpose stall barn(s):
 - Year-round stall barns/flat floor space
 - 150-stall capacity per barn.
- 3** Ag Extension & Education Center:
 - 6,000 square feet of sub-divisible meeting space.
 - 10,000 square feet of office space.
 - Full-service kitchen facilities.
 - Testing lab.
- 4** Dedicated surface parking for passenger vehicles, trucks with trailers and RVs.
- 5** Upgraded Midway space for UMVF.

**TOTAL ESTIMATED DEVELOPMENT COST:
\$78.4 MILLION (plus cost to acquire UMVF site)**



Source: Convergence Design, 2023.

EXECUTIVE SUMMARY: Ice Facility Development Options

PURPOSE BUILT DEVELOPMENT SCENARIO A

- 1 Convert Hangar to year-round ice sheet.
- 2 2nd ice sheet - seasonal.
- 3 Outdoor covered & refrigerated ice sheet.
- 4 Potential/optional future Multipurpose Arena/Event Center.

**ESTIMATED ICE FACILITIES DEVELOPMENT COST:
\$66.3 MILLION (plus cost of replacing Hangar storage space)**

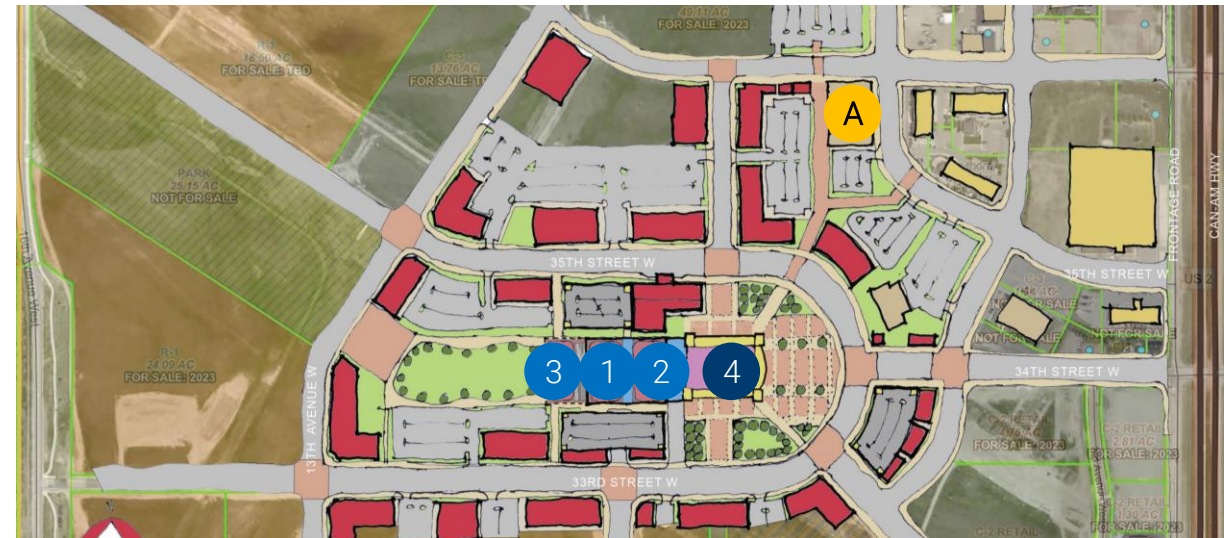


Source: Convergence Design, 2023.

MULTIPURPOSE DEVELOPMENT SCENARIO B

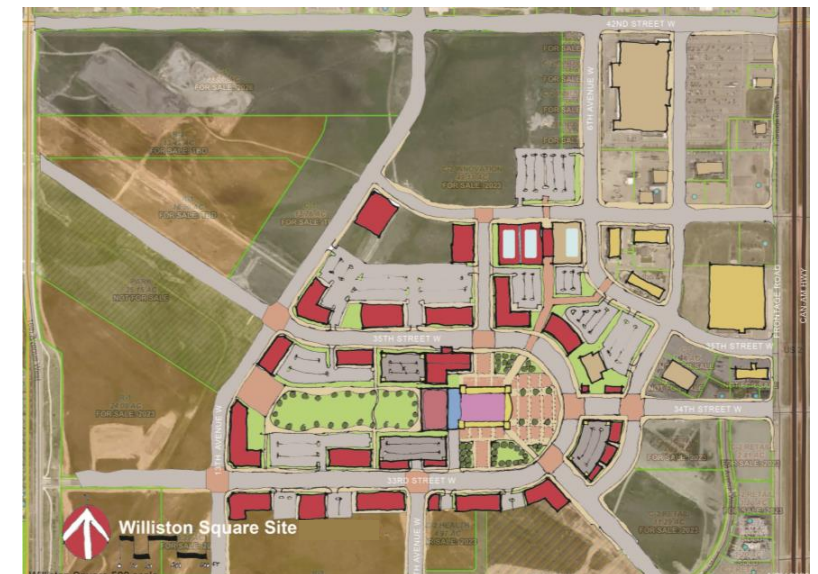
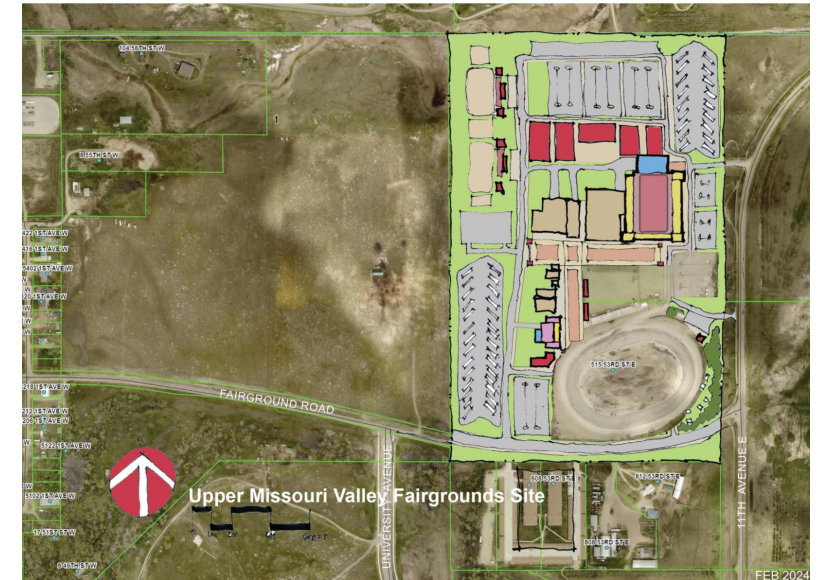
- 1 Year-round ice sheet.
 - 2 2nd ice sheet - seasonal.
 - 3 Outdoor covered & refrigerated ice sheet.
 - 4 Potential/optional future Multipurpose Arena/Event Center.
- A Retain Hangar as storage space.

**ESTIMATED ICE FACILITIES DEVELOPMENT COST:
\$73.8 MILLION**



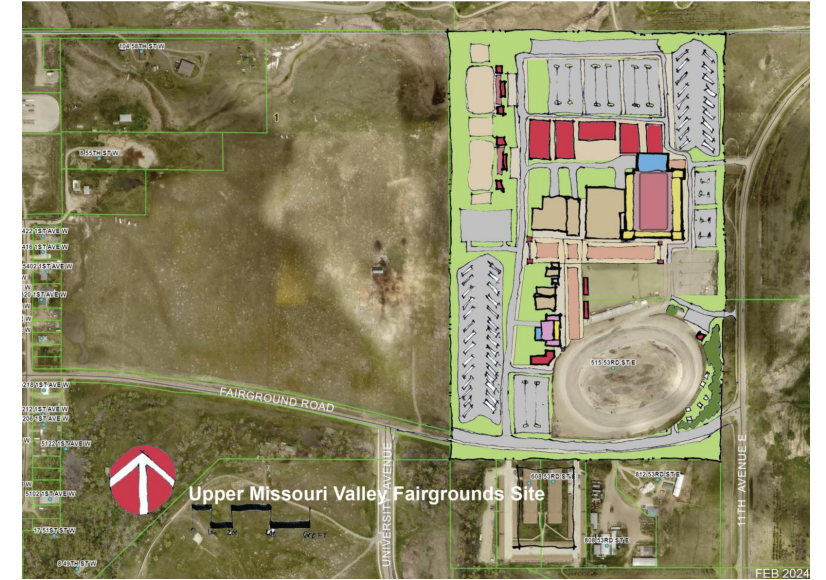
EXECUTIVE SUMMARY: UMVF & Purpose-Built Scenario A Cost

Facility Component	Hard Const Costs (2023\$)	Soft Const Costs (2023\$)	Total Const Costs (2023\$)
Acquire UMVF			TBD
Equestrian/Livestock Event Center	\$41,600,000	\$10,400,000	\$52,000,000
Multipurpose Stall Barn	\$3,800,000	\$1,000,000	\$4,800,000
Ag Extension & Education Center	\$6,600,000	\$1,700,000	\$8,300,000
UMVF Supporting Infrastructure			
Surface Parking	\$4,000,000	\$1,000,000	\$5,000,000
Midway	\$1,600,000	\$400,000	\$2,000,000
Sitework/Utility Allowance	\$5,000,000	\$1,300,000	\$6,300,000
Williston Square Supporting Infrastructure Total	\$10,600,000	\$2,700,000	\$13,300,000
TOTAL UMVF SCENARIO COSTS	\$62,600,000	\$15,800,000	\$78,400,000
Purpose-Built Multi-Sheet Ice Complex			
Primary Year-Round Sheet (The Hangar)	\$17,100,000	\$4,300,000	\$21,400,000
Secondary Seasonal Sheet	\$23,100,000	\$5,800,000	\$28,900,000
Covered Outdoor Sheet	\$12,800,000	\$3,200,000	\$16,000,000
Multi-Sheet Ice Complex Total	\$53,000,000	\$13,300,000	\$66,300,000
TOTAL UMVF + PURPOSE BUILT SCENARIO COSTS	\$115,600,000	\$29,100,000	\$144,700,000



EXECUTIVE SUMMARY: UMFV & Multipurpose Scenario B Cost

Facility Component	Hard Const Costs (2023\$)	Soft Const Costs (2023\$)	Total Const Costs (2023\$)
Acquire UMFV			TBD
Equestrian/Livestock Event Center	\$41,600,000	\$10,400,000	\$52,000,000
Multipurpose Stall Barn	\$3,800,000	\$1,000,000	\$4,800,000
Ag Extension & Education Center	\$6,600,000	\$1,700,000	\$8,300,000
UMVF Supporting Infrastructure			
Surface Parking	\$4,000,000	\$1,000,000	\$5,000,000
Midway	\$1,600,000	\$400,000	\$2,000,000
Sitework/Utility Allowance	\$5,000,000	\$1,300,000	\$6,300,000
Williston Square Supporting Infrastructure Total	\$10,600,000	\$2,700,000	\$13,300,000
TOTAL UMFV SCENARIO COSTS	\$62,600,000	\$15,800,000	\$78,400,000
Multipurpose Multi-Sheet Ice Complex			
Primary Year-Round Sheet	\$23,100,000	\$5,800,000	\$28,900,000
Secondary Seasonal Sheet	\$23,100,000	\$5,800,000	\$28,900,000
Covered Outdoor Sheet	\$12,800,000	\$3,200,000	\$16,000,000
Multi-Sheet Ice Complex Total	\$59,000,000	\$14,800,000	\$73,800,000
TOTAL UMFV + MULTIPURPOSE BUILT SCENARIO COSTS	\$121,600,000	\$30,600,000	\$152,200,000



EXECUTIVE SUMMARY: Williston Square Development Scenarios

Alternative development scenarios presented below provides for facility development at Williston Square, with the UMVF retaining status quo for facility operations.

PURPOSE-BUILT FACILITIES

- Multipurpose Arena/Event Center:
 - Concrete floor with retractable seating.
 - Primary show ring of 125'x250'.
 - Fixed seating for 1,000 for dirt events.
 - Flexible seating to accommodate up to 4,000 (including floor seating) for concerts and entertainment events.
 - 30,000 SF floor for flat floor events.
 - Enclosed stall barn for warm-up space or up to 75 temporary stalls (15,000 SF).
 - Attached indoor stall barn for 150 temporary stalls (30,000 SF).
- Separate indoor multi-sheet ice complex:
 - Repurpose The Hangar for a year-round ice sheet with seating for 1,000.
 - One seasonal ice sheet with seating for 500.
 - Covered and refrigerated outdoor ice sheet with seating for 500.

MULTIPURPOSE EVENT FACILITIES

- Multipurpose Arena/Event Center:
 - Concrete floor with retractable seating.
 - Primary show ring of 125'x250'.
 - Fixed seating for 1,000 for dirt events.
 - Flexible seating to accommodate up to 4,000 (including floor seating) for concerts and entertainment events.
 - 30,000 SF floor for flat floor events.
 - Enclosed stall barn for warm-up space for up to 75 temporary stalls (15,000 SF).
- Two-sheet ice complex with NHL-size rinks:
 - Secondary sheet attached to Multipurpose Arena/Event Center with removable bleacher seating for approximately 500 operating from September through March; convertible to indoor stall barn from April through August for 150 temporary stalls (30,000 SF).
 - Primary sheet with seating for up to 1,000 to be utilized year-round.
 - Covered and refrigerated outdoor ice sheet with seating for 500.

EXECUTIVE SUMMARY: Purpose-Built Scenario C

- 1 Multipurpose Arena/Event Center:
 - Year-round dirt floor with concrete base.
 - Civic Plaza outdoor space.
 - Parking, site and other infrastructure.
 - Nearby RV and trailer parking.
- 2 Multipurpose stall barn:
 - Year-round stall barns/flat floor space.
- 3 Convert Hangar to year-round ice sheet.
- 4 Secondary seasonal ice sheet.
- 5 Covered and refrigerated outdoor ice sheet.
- 6 Ag Extension & Education Center:
 - 6,000 square feet of sub-divisible meeting space.
 - 10,000 square feet of office space.
 - Full-service kitchen facilities.

**TOTAL ESTIMATED DEVELOPMENT COST:
\$162.7 MILLION**



Source: Convergence Design, 2023.

EXECUTIVE SUMMARY: Purpose-Built Scenario C Cost

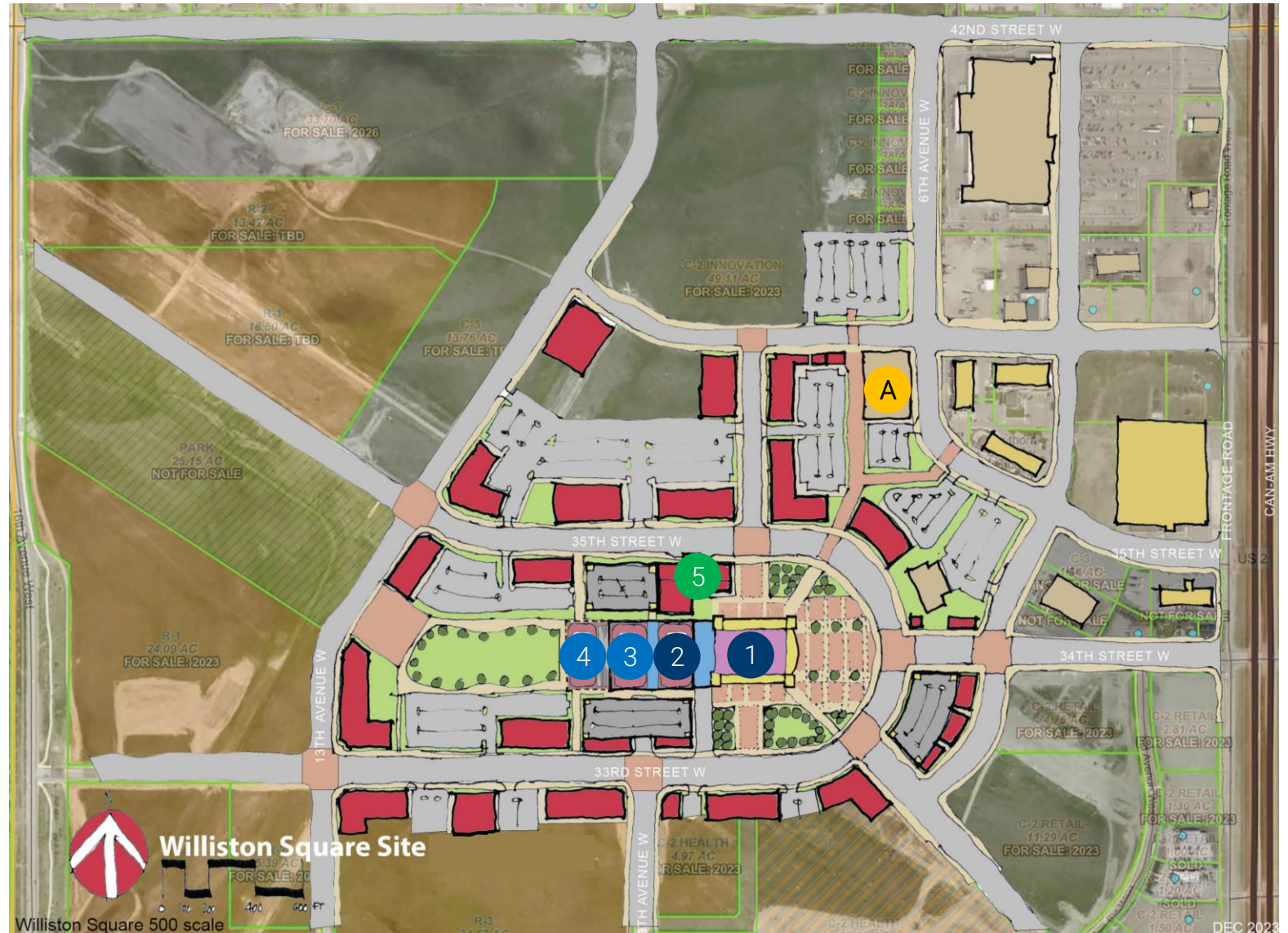
Facility Component	Hard Const Costs (2023\$)	Soft Const Costs (2023\$)	Total Const Costs (2023\$)
Multipurpose Arena/Event Center	\$50,000,000	\$12,500,000	\$62,500,000
Multipurpose Stall Barn	\$8,000,000	\$2,000,000	\$10,000,000
Multi-Sheet Ice Complex			
Primary Year-Round Sheet (The Hangar)	\$17,100,000	\$4,300,000	\$21,400,000
Secondary Seasonal Sheet	\$23,100,000	\$5,800,000	\$28,900,000
Covered Outdoor Sheet	\$12,800,000	\$3,200,000	\$16,000,000
Multi-Sheet Ice Complex Total	\$53,000,000	\$13,300,000	\$66,300,000
Ag Extension & Education Center	\$6,600,000	\$1,700,000	\$8,300,000
Williston Square Supporting Infrastructure			
Civic Plaza	\$3,400,000	\$900,000	\$4,300,000
Surface Parking	\$4,000,000	\$1,000,000	\$5,000,000
Sitework/Utility Allowance	\$5,000,000	\$1,300,000	\$6,300,000
Williston Square Supporting Infrastructure Total	\$12,400,000	\$3,200,000	\$15,600,000
TOTAL PURPOSE-BUILT SCENARIO COST	\$130,000,000	\$32,700,000	\$162,700,000



EXECUTIVE SUMMARY: Multipurpose Scenario D

- 1 Multipurpose Arena/Event Center:
 - Dirt/flat floor/entertainment.
 - Civic Plaza outdoor space.
 - Parking, site and other infrastructure.
 - Nearby RV and trailer parking.
- 2 Multipurpose Stall Barn/Ice Center:
 - September-March – Ice.
 - April-August – stall barns/flat floor space.
- 3 Year-round ice sheet.
- 4 Potential outdoor covered/indoor ice sheet.
- 5 Ag Extension & Education Center:
 - 6,000 square feet of sub-divisible meeting space.
 - 10,000 square feet of office space.
 - Full-service kitchen facilities.
- A Hangar to remain storage space.

**TOTAL ESTIMATED DEVELOPMENT COST:
\$153.8 MILLION**



Source: Convergence Design, 2023.

EXECUTIVE SUMMARY: Multipurpose Scenario D Cost

Facility Component	Hard Const Costs (2023\$)	Soft Const Costs (2023\$)	Total Const Costs (2023\$)
Multipurpose Arena/Event Center	\$50,000,000	\$12,500,000	\$62,500,000
Multipurpose Stall Barn/Seasonal Ice Sheet	\$18,000,000	\$4,500,000	\$22,500,000
Year-round Ice Sheet	\$23,100,000	\$5,800,000	\$28,900,000
Covered/Outdoor Ice Sheet	\$12,800,000	\$3,200,000	\$16,000,000
Ag Extension & Education Center	\$6,600,000	\$1,700,000	\$8,300,000
Williston Square Supporting Infrastructure			
Civic Plaza	\$3,400,000	\$900,000	\$4,300,000
Surface Parking	\$4,000,000	\$1,000,000	\$5,000,000
Sitework/Utility Allowance	\$5,000,000	\$1,300,000	\$6,300,000
Williston Square Supporting Infrastructure Total	\$12,400,000	\$3,200,000	\$15,600,000
TOTAL MULTIPURPOSE SCENARIO COSTS	\$122,900,000	\$30,900,000	\$153,800,000



EXECUTIVE SUMMARY: Purpose-Built Operating Impacts

SCENARIO OPERATIONS AND FUTURE DEVELOPMENT IMPLICATIONS:

The following analysis provides insight into potential operating implications of the identified development opportunities in Williams County.

SCENARIO A – UMVF Build-out with Purpose-Built Ice Facilities:

- Assume County would take ownership of UMVF with rental agreement to UMVF Fair Board for rights to host annual Fair.
- Multipurpose Equestrian/Livestock Event Center projected to be optimized as operated within an Authority model, with a Board of Directors appointed by representatives of Williams County, city of Williston, WPRD and/or other community stakeholder groups.
- Multi-Sheet Ice Complex and Raymond Center operations projected to be optimized managed by Williston Parks & Recreation District (WPRD).
- Future development of a Multipurpose Arena/Event Center at such a time as Equestrian/Livestock Event Center event occupancy exceeds practical maximum capacity and sufficient concert, entertainment, sports tourism, flat floor and other such event activity can sustainably occupy separate venue.

SCENARIO B – UMVF Build-out with Multipurpose Ice Facilities:

- Multipurpose Arena/Event Center would be attached to a 30,000 SF concrete-floor multipurpose facility housing seasonal ice from September through March and flat floor show and other event activity from April through August.
- Shared event space and eventual co-location of Arena/Event Center and Multi-Sheet Ice Complex would be expected to increase overall occupancy, particularly within the shared multipurpose event building, and reduce operational and staffing requirements.
- Upon development of Multipurpose Arena/Event Center, operations of the collective complex including the Multi-Sheet Ice Complex would be optimized operated within an Authority model. Until development of Arena/Event Center, Multi-Sheet Ice Complex operations would be optimized as managed by WPRD.

SCENARIO C – Williston Square Purpose-Built Facilities:

- Multipurpose Event Center projected to be optimized as operated within an Authority model, with a Board of Directors appointed by representatives of Williams County, city of Williston, WPRD and/or other community stakeholder groups.
- Multi-Sheet Ice Complex and Raymond Center operations projected to be optimized as managed by Williston Parks & Recreation District (WPRD).
- Ag Extension & Education Center would be located adjacent to Multipurpose Event Center to provide operational synergies with 4-H/FFA programming.

SCENARIO D – Williston Square Multipurpose Facilities:

- Collective complex including the Multipurpose Arena and Multi-Sheet Ice Complex would be optimized as operated within an Authority model.
- Additional potential to program Great Lawn space west of covered outdoor ice sheet.

EXECUTIVE SUMMARY: Purpose-Built Operating Impacts

The following analysis provides insight into potential annual financial operating implications of the identified Implementation Options, recommendations for Capital Repair and Reserve Funding (equal to 0.5 percent of upfront hard construction costs) is presented below for each of the four Development Scenarios considered. Importantly, the analysis provided is based on industry standard operations of similar facilities in markets throughout the country. A full market and financial feasibility study would be needed to refine operating projections for each of these facilities.

Facility Component	Scenario A		Scenario B		Scenario C		Scenario D	
	UMVF & Purpose-Built Ice Facilities		UMVF & Multipurpose Ice Facilities		Williston Square Purpose-Built Facilities		Williston Square Multipurpose Facilities	
	Low	High	Low	High	Low	High	Low	High
Operating Cost Estimate								
Multipurpose Equestrian/Livestock Event Center	(\$100,000)	(\$650,000)	(\$100,000)	(\$650,000)				
Multipurpose Event Center					(\$150,000)	(\$750,000)	(\$150,000)	(\$800,000)
Multi-Sheet Ice Complex	(\$50,000)	(\$500,000)	(\$50,000)	(\$500,000)	(\$50,000)	(\$500,000)	(\$50,000)	(\$400,000)
Ag Extension & Education Center	(\$50,000)	(\$450,000)	(\$50,000)	(\$450,000)	(\$50,000)	(\$450,000)	(\$50,000)	(\$450,000)
Raymond Center (w/ Turf)	(\$50,000)	(\$200,000)	(\$50,000)	(\$200,000)	(\$50,000)	(\$200,000)	(\$50,000)	(\$200,000)
Total Annual Operating Cost Estimate	(\$250,000)	(\$1,800,000)	(\$250,000)	(\$1,800,000)	(\$300,000)	(\$1,900,000)	(\$300,000)	(\$1,850,000)
Capital Repair & Replacement Funding	(\$524,000)	(\$524,000)	(\$554,000)	(\$554,000)	(\$637,000)	(\$637,000)	(\$601,500)	(\$601,500)
Estimated Staffing Needs								
Multipurpose Equestrian/Livestock Event Center	6	10	6	10				
Multipurpose Event Center					12	16	12	16
Multi-Sheet Ice Complex	6	10	6	10	6	10	6	10
Ag Extension & Education Center	NA	NA	NA	NA	NA	NA	NA	NA
Raymond Center (w/ Turf)	4	8	4	8	4	8	4	8
Part-Time Labor Pool (Combined)	10	20	10	20	12	24	12	24
Total Staff Considerations	26	48	26	48	34	58	34	58

EXECUTIVE SUMMARY: Community Investment

In addition to the facility infrastructure recommendations outlined previously, the following County-wide community investment opportunities have been identified for further consideration:

COUNTY-WIDE COMMUNITY INVESTMENT OPPORTUNITIES

GRENORA

OUTDOOR FIELD SPACE – GRENORA

- Grenora Public School currently lacks a permanent grandstand for high school football, soccer and other rectangle field sports games. Additionally, student track and field athletes do not have a 400m track for meets and competitions.
- Development of a football stadium with bleacher seating, press box, concessions, restrooms overlooking a natural grass field and 400m track are estimated to accommodate demand.

RAY

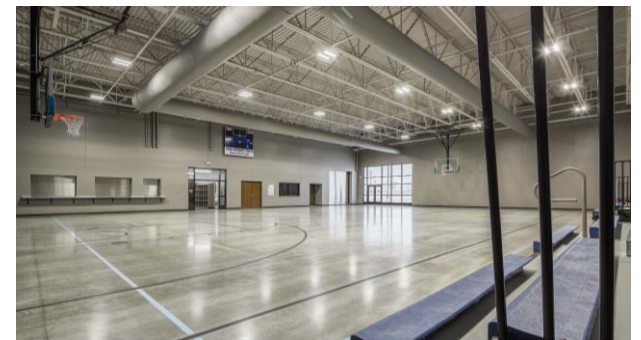
ENHANCED MEETING/EVENT FACILITIES – RAY

- Ray Golf Course currently has plans to improve its clubhouse to provide meeting, banquet and other event space in the market. Public sector providing capital funding assistance to support fundraising and private investment, with facility operations the responsibility of the Golf Course. Operating this space is expected to provide important context to demand for event space in Ray. As demand continues to increase, further discussion of investing into other new/expanded event space would be warranted.
- Potential opportunity to develop community recreation and/or event space based on local demand. Operational responsibility and subsidy would be borne by local community and supported by user fees and/or local tax revenue. Determination to proceed based on community feedback and willingness to support.

TIOGA

ENHANCED MEETING/EVENT FACILITIES – TIOGA

- Tioga Community Center management has indicated that event activity exceeds practical maximum capacity.
- Continued investment in this important community asset should be strongly considered to meet growing community need for event space.
- School Bond passed in January 2024 and the City has secured a loan for Community Center expansion.



EXECUTIVE SUMMARY: Community Investment (cont'd)

COUNTY-WIDE COMMUNITY INVESTMENT OPPORTUNITIES (cont'd)

TIOGA (cont'd)

INDOOR COURT SPACE – TIOGA

- Growing enrollment in Tioga School District (approximately 70 percent since 2011) has resulted in the need for additional classroom and activity space.
- Central Elementary School in Tioga is landlocked and unable to add space making an expansion of Tioga High School (THS) the most viable option.
- In addition to classroom space, THS would also require additional indoor court space to accommodate physical education class activities.
- Development of a second indoor gymnasium at THS could also provide benefit to community recreation sports/activities (e.g., basketball, volleyball, wrestling, dance, cheerleading, etc.) if the High School allows programming from outside groups.



TRENTON

YOUTH/AMATEUR SPORTS AND ACTIVITY SPACE

- Community sports and activity space is somewhat constrained within this growing community.
- Trenton High School sports/activities are currently constrained for practice and competition space for indoor sports activities and face challenges expanding due to land constraints. Additionally, their 400m outdoor track is aging and likely needs to be resurfaced in the near future.
- The Trenton community currently lacks sufficient outdoor diamond fields for baseball/softball and the only fitness center is at Trenton Indian Services Area (TISA). There is a potential need for indoor training space and/or a walking track.



WILDROSE

COMMUNITY OUTDOOR STAGE

- Community is looking to develop an outdoor stage along Main Street as a permanent home for annual events, music performances, community events and other community gathering activities.



EXECUTIVE SUMMARY: Community Investment (cont'd)

COUNTY-WIDE COMMUNITY INVESTMENT OPPORTUNITIES (cont'd)

WILLISTON

ENHANCED MEETING/EVENT FACILITIES – WILLISTON

- Existing and planned meeting and event space in Williston are expected to be able to accommodate current demand.
- Explore public/private partnership (P3) opportunities with existing privately owned/operated meeting and event space(s) to improve event activity.
- Consider opportunities to support development of additional meeting and event space in greater Williams County (e.g., Tioga Community Center) to better accommodate local/community demand for event space.



OUTDOOR YOUTH SPORTS FACILITIES – WILLISTON

- Demand exists for diamond fields with the capacity to help transition from youth sports fields (e.g., fields larger than those that can also be used for youth/adult softball and smaller than full-size adult baseball fields).
 - Development of a four-field pinwheel complex with portable pitching mounds and base plugs at 65', 70' and 80' at each field.
 - Target approximately 12-15 acres for fields, concession stand, batting cages, warm-up space, storage, parking and other support space. Potential opportunity to develop at Williston Square to leverage synergies with planned residential and mixed-use development.
 - Synthetic turf fields would provide best overall experience; however, cost to develop is much more substantial than dirt (skinned) infields. Moderate to limited non-local demand for tournament/sports tourism activity limits the potential cost recovery potential.
- Demand exists for additional training space for rectangle field sports (e.g., soccer, football, etc.) and outdoor track. A renovation of facilities at Cutting Field Stadium is estimated to accommodate this demand through:
 - Converting the rectangle field inside the track to synthetic turf.
 - Replacing eight-lane outdoor track surface.



INDOOR YOUTH SPORTS FACILITIES – WILLISTON

- Growing demand exists for an additional indoor court facility, particularly among high school sports and activities. Development of an additional full-size indoor court at Williston High School is estimated to accommodate this demand.

EXECUTIVE SUMMARY: Community Investment (cont'd)

COUNTY-WIDE COMMUNITY INVESTMENT OPPORTUNITIES (cont'd)

WILLIAMS COUNTY

EXPANSION OF WILLIAMS COUNTY COMMUNITY GRANT PROGRAM

- In 2023, the Williams County Board of County Commissioners made available more than \$800,000 in Project Assistance Grants.
- The County received 48 applications requesting more than \$31 million in funding.
- Awardees must submit an Impact Statement highlighting the impact their project had on the Williams County community.
- Continued funding of this program and opportunities to increase funding support through public/private partnerships, state/federal grant programs and other mechanisms should be strongly considered as it provides a measurable impact on the community.

COUNTY-WIDE SALES TAX TO SUPPORT QUALITY-OF-LIFE INVESTMENTS

- Currently, the State of North Dakota levies a 5.0 percent sales tax on goods and services and provides local municipalities the opportunity to levy up to an additional 3.5 percent sales tax.
- This local option sales tax can be instituted for up to 10 years and must be approved by voters.
- The current 1.0 percent Public Safety Sales Tax (PSST) approved by Williams County voters in November 2014 is set to expire March 31, 2025. To-date, over \$200 million has been generated through this revenue stream to support investment in Williams County.
- Extending this existing funding source could be a significant source of revenue for capital investment in quality-of-life facilities throughout Williams County.



EXECUTIVE SUMMARY: Community Investment Cost Estimates

Based on the outlined County-wide Community Investment alternatives, the following order-of-magnitude cost estimates were generated using industry per-unit data adjusted for conditions in Williams County and cost data of comparable facilities, modified for time and locations.

As noted earlier, there are many variables that exist influencing actual realized construction costs, including type of facility (facilities), size, components, level of finish, integrated amenities, costs of goods and services in the local market, location and topography of the site, ingress/egress issues, and other such aspects. Detailed architectural concept, design and costing study would be required to specifically estimate construction costs for any Community Investment realized in Williams County.

As shown, should all community investment opportunities be developed, the total estimated development cost could approximate \$53.8 million.

Facility Component	Hard Const Costs (2023\$)	Soft Const Costs (2023\$)	Total Const Costs (2023\$)
Outdoor Field Space - Grenora	\$8,000,000	\$2,000,000	\$10,000,000
Youth/Amateur Sports Activity Space - Trenton			
Indoor Court & Community Center	\$10,000,000	\$2,500,000	\$12,500,000
400m Outdoor Track Resurfacing	\$800,000	\$200,000	\$1,000,000
Diamond Field Facilities	\$1,300,000	\$300,000	\$1,600,000
Total Youth/Amateur Sports Facilities - Trenton	\$12,100,000	\$3,000,000	\$15,100,000
Community Outdoor Stage - Wildrose	\$150,000	\$40,000	\$190,000
Outdoor Youth Sports Facilities - Williston			
Four-Field Synthetic Turf Diamond Complex	\$4,800,000	\$1,200,000	\$6,000,000
Cutting Field Renovation	\$1,200,000	\$300,000	\$1,500,000
Cutting Field 400m Outdoor Track	\$800,000	\$200,000	\$1,000,000
Total Outdoor Youth Sports Facilities - Williston	\$6,800,000	\$1,700,000	\$8,500,000
Indoor Youth Sports Facilities - Williston			
Turf Raymond Center	\$10,000,000	\$2,500,000	\$12,500,000
Indoor Court at Williston High School	\$6,000,000	\$1,500,000	\$7,500,000
Total Indoor Youth Sports Facilities - Williston	\$16,000,000	\$4,000,000	\$20,000,000
TOTAL COMMUNITY DEVELOPMENT COSTS	\$43,050,000	\$10,740,000	\$53,790,000