



2015 Developing Gillette

City of Gillette Development Summary Through the End of the Fourth Quarter 2015



Construction of the New "Legacy" Living & Rehabilitation Center near Lasting Legacy Park

The **2015 Developing Gillette** Annual Report includes the City's 4th Quarter Development Summary.

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Energy Impacts

The past year was historic for United States energy interests, including the downward spiral of coal and the continued decline of natural gas and oil prices.

- 2015 was extremely stressful for the Coal Mining Industry in the Powder River Basin as a result of increased regulation and declining demand for coal.
- Natural gas prices remain at historic lows.
- Contrast to 2014, oil development in the Powder River Basin slowed dramatically in 2015.
- At the end of 2015 the price of oil dropped to nearly \$30 per barrel after experiencing over \$100 per barrel in early 2014.

The decrease in activity associated with the energy industry in Campbell County and the Powder River Basin impacted Gillette's growth and development trends in 2015.

2015 Growth and Development Highlights

- New commercial construction for retail, banks and hotels helped stabilize the local economy from other impacts resulting from a depressed energy market.
- Revenues collected in recent "energy-boom" years were invested to continue large-scale, publicly-funded building projects in 2015.
- The total valuation for all new commercial permits issued in 2015 is **\$70,767,819**.
- New housing permits for 2015 were less than permits issued in 2014.
- The total valuation for all new housing permits issued in 2015 is **\$50,105,554**.
- The vacancy rate for apartments/rental units in the fourth quarter of 2015 has increased to **9.3%** compared to **1.3%** in the fourth quarter of 2014.
- There are approximately **158** apartment/rental units currently available in the rental stock surveyed in Gillette.
- The vacancy rate for mobile/manufactured home units in manufactured home parks in the fourth quarter of 2015 has increased to **9.1%** compared to **4.8%** in the fourth quarter of 2014.
- There are approximately **131** mobile/manufactured home units in manufactured home parks currently available in the rental stock surveyed in Gillette.
- The incorporated area of the City of Gillette is **21.7** square miles.
- Gillette's robust population growth experienced during the past 15 years slowed dramatically in 2015.
- The estimated population of the City of Gillette at the end of 2015 is **31,411**.
- The unemployment rate in Campbell County increased approximately 1% from 2014 to 2015.



New First Interstate Bank Located at Lakeway and South Douglas Hwy

Commercial Project Horizon

Project	Status
Thunder Basin High School (expand CCHS So. Campus)	Under Construction
Stocktrail Elementary School	Under Construction
Ruby Tuesday's Restaurant – Boxelder Road	Under Construction
Gillette College Education and Activities Center	Under Construction
Legacy Living & Rehabilitation Center – Douglas Hwy	Under Construction
LaQuinta Inn Hotel – Boxelder Road	Under Construction
Orthodontics Clinic – Oakcrest Drive	Under Construction
Marriott Residence Inn – Hwy 50 & US 14/16	Under Construction
New Apartment Complex – Lakeway and Hwy 50	Permits Issued – Construction to Commence Soon

New Commercial Construction Permits Yearly Totals 2011 – 2015

Entire Year - 2015: 28	Valuation: \$70,767,819
Entire Year - 2014: 23	Valuation: \$82,610,443
Entire Year - 2013: 27	Valuation: \$30,643,901
Entire Year - 2012: 30	Valuation: \$23,813,746
Entire Year - 2011: 25	Valuation: \$23,272,779

Commercial Additions and Alterations Yearly Totals 2011 – 2015

2015: 64	Valuation: \$41,563,682
2014: 90	Valuation: \$24,505,678
2013: 58	Valuation: \$10,323,461
2012: 78	Valuation: \$22,591,121
2011: 66	Valuation: \$14,327,599



New LaQuinta Inn on Boxelder Rd near Kmart

2015 Commercial/Industrial Subdivisions Approved

Name	Zoning	# New Lots	Comments / Location	Neighborhood
ANB Subdivision	C-1	2	New ANB Bank	Meadowlark
Homestead Addition Resubdivision	C-1	4	LaQuinta and Ruby Tuesday	Sunflower
Gillette Tech Center Phase III Subdivision	C-O	4	Gillette College	Lakeway
Sunrise Addition Resubdivision	C-1	2	Town Center Retail	Country Club
RC Ranch Business Park PUD	PUD	2	Running W Dr & Shoshone Ave	South Park
Devon Addition	C-1 & I-2	2	Butler Spaeth Rd & Garner Lake Rd	Sunburst
TOTAL NEW LOTS		16		

Housing Project Horizon

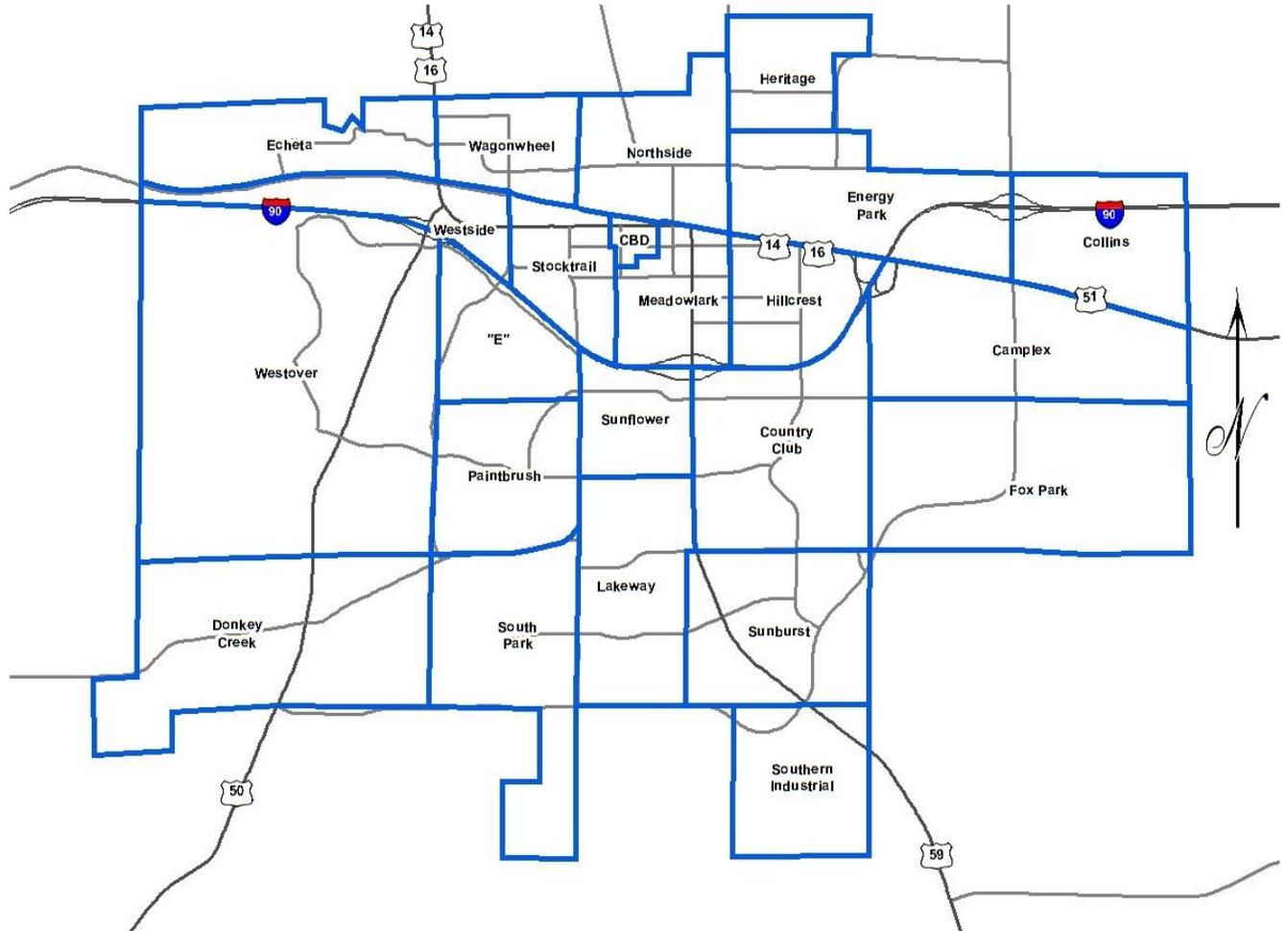


New Home Construction near Bell Knob Golf Course

2015 Residential Subdivisions Approved

Name	Zoning	# New Lots	Comments	Neighborhood
Paradise Point Subdivision	R-S	6	Single Family Residential Lots	Westover
Parkside Estates Filing 1 Subdivision	R-1	20	Single Family Residential Lots	Country Club
TOTAL NEW LOTS		26		

CITY OF GILLETTE NEIGHBORHOOD MAP



New Housing
New Housing Units Permitted by Type and Neighborhood
January 1 – September 30, 2015

Neighborhood – Grouped By Geographic Location	SFD	SFA	Manufactured/Mobile Home	Multi-Family	Total
Complex	6				6
Collins					
Fox Park	2		9		11
Energy Park	11				11
Heritage			4		4
Northside			1		1
Wagonwheel					
Echeta	3		1		4
Westside					
CBD					
E					
Hillcrest					
Meadowlark					
Stocktrail					
Paintbrush	3				3
Westover	14			54	68
Country Club	9				9
Sunflower					
Donkey Creek	1				1
Lakeway	12	1			13
South Park	6				6
Sunburst	16	4			20
TOTAL For Year	83	5	15	54	157
% For Year	53%	3%	10%	34%	100%

SFD = Single Family Detached // SFA = Single Family Attached Up To Three Units // Multi-Family = Four or More Units

Valuation: The total valuation for all new housing permits issued in 2015 is \$50,105,554.

Comparison: New Housing Units Permitted 2007 – 2015

Year	Total New Housing Permits Issued
2015	157
2014	183
2013	129
2012	210
2011	208

**Residential Final Certificate of Occupancy Issued
Yearly Totals 2011 – 2015**

Year	Final Certificates of Occupancy Issued
2015	119
2014	151
2013	140
2012	188
2011	303

Note: The Final Certificate Occupancy means that the dwelling is approved for permanent occupancy.

**Residential Additions and Alterations
Yearly Totals 2011 – 2015**

Year	Number of Permits	Valuation
2015	116	\$2,610,512
2014	103	\$1,886,018
2013	105	\$2,391,665
2012	91	\$1,505,932
2011	80	\$1,701,568

Rental Vacancy Rates

The vacancy rate for apartments/rental units in the fourth quarter of 2015 has increased to **9.3%** compared to **1.3%** in the fourth quarter of 2014. There are approximately 158 apartment/rental units currently available in the rental stock surveyed in Gillette.

The vacancy rate for mobile/manufactured home units in manufactured home parks in the fourth quarter of 2015 has increased to **9.1%** compared to **4.8%** in the fourth quarter of 2014. There are approximately 131 mobile/manufactured home units in manufactured home parks currently available in the rental stock surveyed in Gillette.

Rental Vacancy Rate by Quarter 2011 – 2015 by Percent Vacant

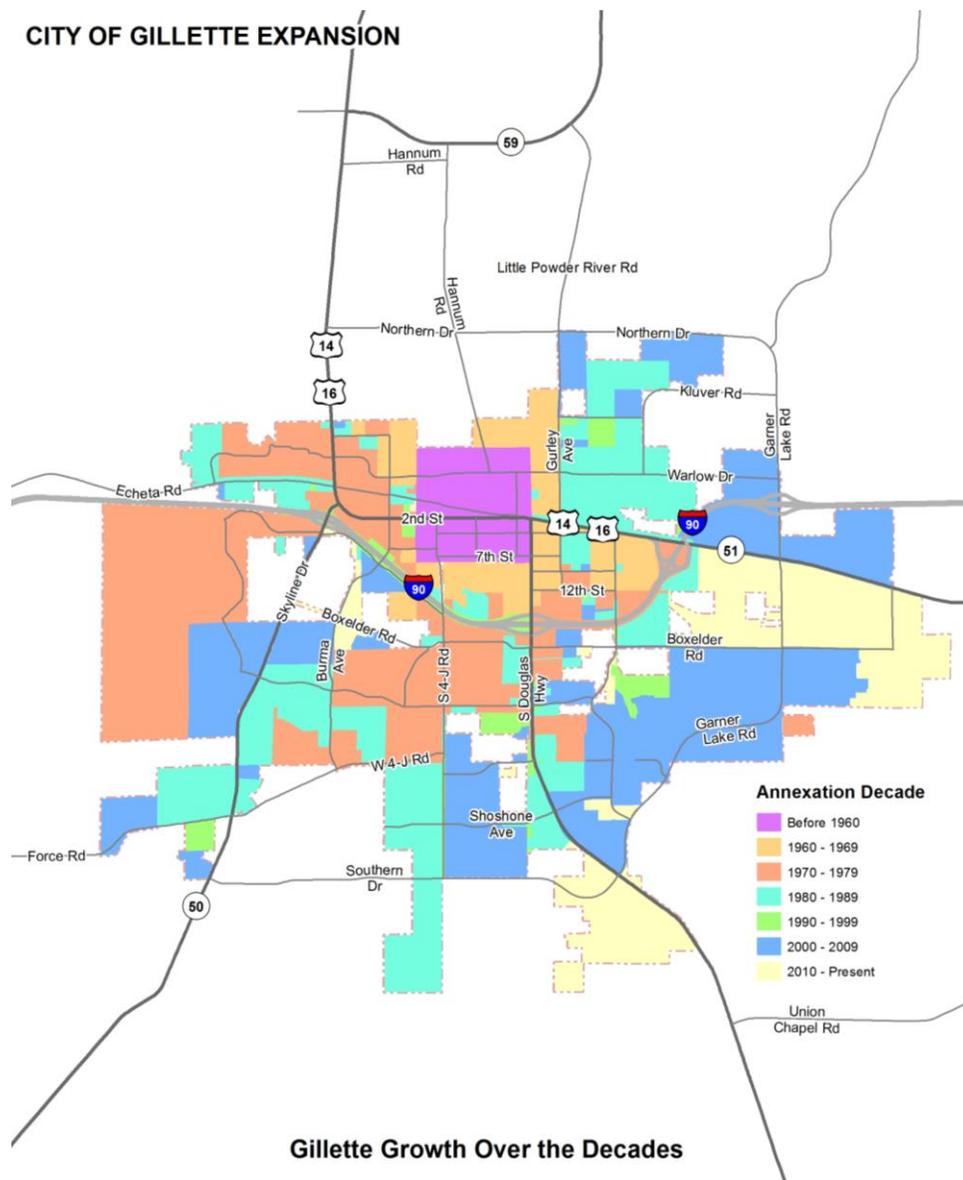
Apartments and Other Buildings	1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter	Average for Year
2011	6.3	6.3	8.5	8.9	7.5%
2012	8.2	7.5	7.5	9.2	8.1%
2013	12.5	9.1	4.9	4.5	7.7%
2014	4.4	1.3	.7	1.3	1.9%
2015	3.7	5.9	8.2	9.3	6.8%
Manufactured and Mobile Home Parks					
2011	8.3	8.3	7.5	7.5	7.9%
2012	7.5	8.4	8.4	7.9	8.0%
2013	7.9	6.6	7.5	6.4	7.0%
2014	6.4	6.3	5.5	4.8	5.7%
2015	9.2	9.1	9.6	9.1	9.3%

Sample Size 2015: Apartments/other residential rental buildings at 1,691; manufactured and mobile homes in parks at 1,431 units. Rental buildings sample makes up about 55% of all known units and manufactured/mobile home sample makes up about 50% of all known units.

ANNEXATIONS

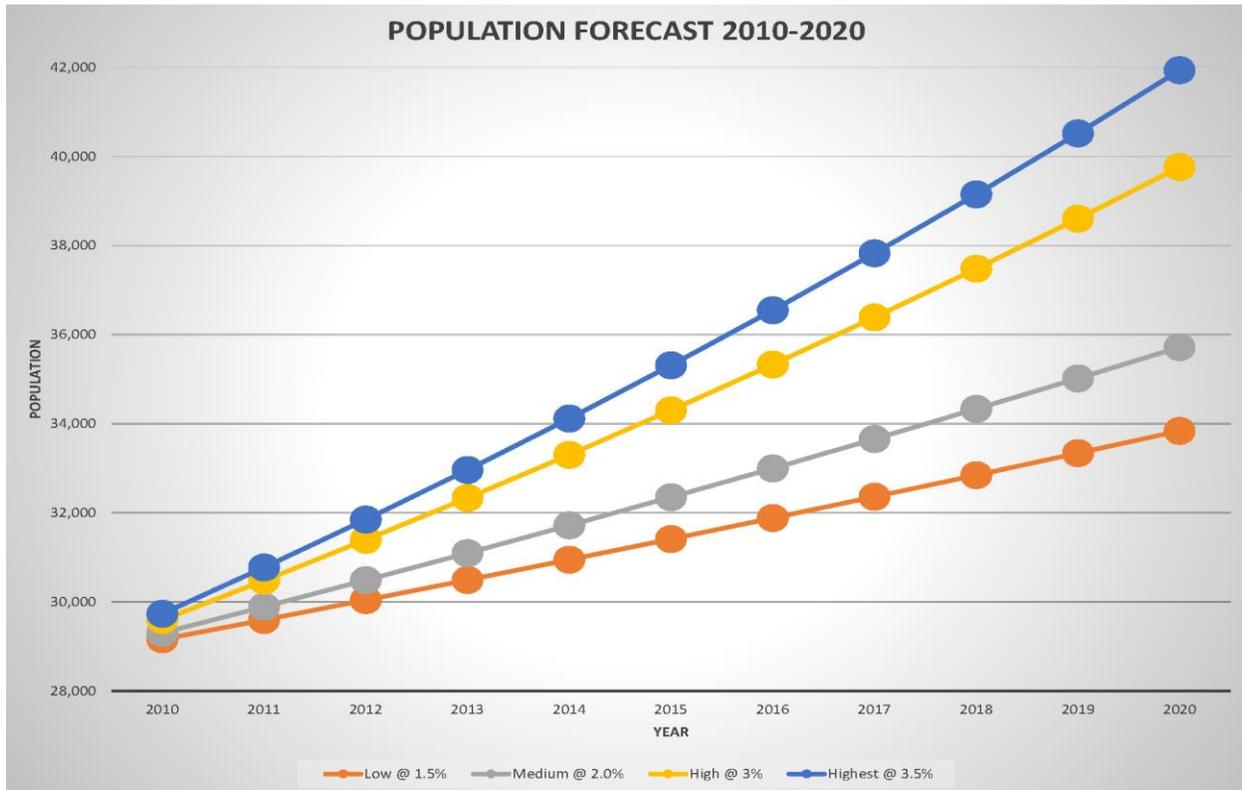
Two (2) annexations were completed in 2015. The City of Gillette corporate limits currently encompass 21.7 square miles. By comparison, the City of Gillette was 16.15 square miles in 2008.

Name	Annexation Date and Ordinance	Acreage and Zoning	Number of Dwelling Units	Estimated Population
Betcher Annexation	8/18/15 Ord. 3866	11.09 acres / C-3 zoning 10.71 acres / I-1 zoning	0	0
Kintz Addition (Rockpile Museum)	11/02/15 Ord. 3877	2.81 acres / C-O zoning	0	0



POPULATION

The City's population increase resulting from annexation(s) and new housing permit(s) issued in 2014 and 2015 was offset by the increased vacancy rate(s) of existing rental units and other housing stock realized at the end of 2015. As a result, the population of the City of Gillette at the end of 2015 is estimated to be 31,411, which represents a "low-growth" rate of 1.5% per year as summarized in the figure and tables below.



City of Gillette Population Forecast - 2010 to 2015

Year	Low @ 1.5%	Medium @ 2.0%	High @ 3%	Highest @ 3.5%
2010	29,157	29,301	29,588	29,731
2011	29,595	29,887	30,476	30,771
2012	30,039	30,485	31,390	31,847
2013	30,490	31,095	32,332	32,962
2014	30,947	31,717	33,302	34,116
2015	31,411	32,351	34,302	35,310

Source: City of Gillette, Planning Division, Nov. 2010

City of Gillette Population Forecast - 2016 to 2020

Year	Low @ 1.5%	Medium @ 2.0%	High @ 3%	Highest @ 3.5%
2016	31,882	32,998	35,331	36,545
2017	32,360	33,657	36,390	37,824
2018	32,845	34,331	37,482	39,148
2019	33,338	35,017	38,607	40,519
2020	33,838	35,718	39,765	41,937

Source: City of Gillette, Planning Division, Dec. 2014

GILLETTE AREA PUBLIC IMPROVEMENT PROJECTS



Gillette College Student Housing Construction

Major public projects, either completed or ongoing throughout the Gillette Community in 2015 include:

- Westover Road Reconstruction from Skyline to Burma (City of Gillette)
- Boxelder Road Resurfacing from Hwy 59 to the new Home2 Suites (City of Gillette)
- Energy Capital Sports Complex softball fields and facilities (City of Gillette - General Fund)
- Third Street Plaza (City of Gillette)
- Multiple street and pavement management projects (City of Gillette)
- Multiple sidewalk & pathways projects (City of Gillette)
- Multiple drainage improvement projects (City of Gillette)
- Water System Improvements for mains and transmission lines (City of Gillette)
- Sanitary Sewer Improvements for pipelines, pumping and treatment (City of Gillette)
- Electrical Improvements for the Southern Industrial Park Area (City of Gillette)
- Fiber Optics and Electrical Transmission/Distribution Improvements (City of Gillette)
- Wyoming Hwy 51 Widening from Garner Lake Rd to Timber Creek Rd (WYDOT)
- Wyoming Hwy 59 Bridge Rehabilitation at Donkey Creek (WYDOT)
- New Weed & Pest Facility (Campbell County)
- County Road maintenance & rehabilitation projects (Campbell County)
- Parks & pathways maintenance (Campbell County)
- Drainage improvements and dust control on various County roads (Campbell County)
- Landfill Improvements (Campbell County)
- Gillette College Pronghorn Center (Gillette College)
- Gillette College Student Housing (Gillette College)
- Gillette College Rodeo Practice Facility (Gillette College)
- Legacy Living and Rehabilitation Center (Campbell County Hospital)
- New Stocktrail Elementary School (Campbell County School District #1)
- New Thunder Basin High School / Expansion of CCHS South Campus (CCSD#1)

Campbell County Voters approved the Optional 1% Sales Tax during the 2014 General Election for another four years. The Optional 1% Sales Tax generates approximately \$30M on an annual basis and is used for public capital improvement projects throughout Campbell County. The Optional 1% Sales Tax Revenue is distributed to the City of Gillette, Town of Wright and unincorporated Campbell County on a population basis. Several of the aforementioned projects were funded by the Optional 1% Sales Tax.



Construction of the New Thunder Basin High School
(Expansion of the existing CCHS South Campus)

During a special election on May 3, 2011, Campbell County Voters approved an additional one percent (1%) specific purpose excise tax (Capital Facilities Tax) in the amount of \$110M to pay for a portion of water system improvements for the Gillette Regional Water System and other water system improvements in Wright. During the first quarter of 2015, the entire \$110M amount had been collected resulting in the total sales tax assessment in Campbell County decreasing from 6% to 5%.

Major construction contracts associated with the Gillette Regional Water Supply Project, either completed or ongoing in 2015 include:

- Completion of the 42-inch Transmission Main between Wyodak and Moorcroft
- Completion of water transmission/distribution improvements near Pine Ridge in Crook County
- Construction of the new water treatment facility near Pine Ridge in Crook County
- Construction of the new water transmission pumping facility near Rozet
- Construction of regional water line extensions for the Force Road and Cook Road areas
- Start construction of three additional wells near Pine Ridge in Crook County



Gillette Madison Pipeline Construction

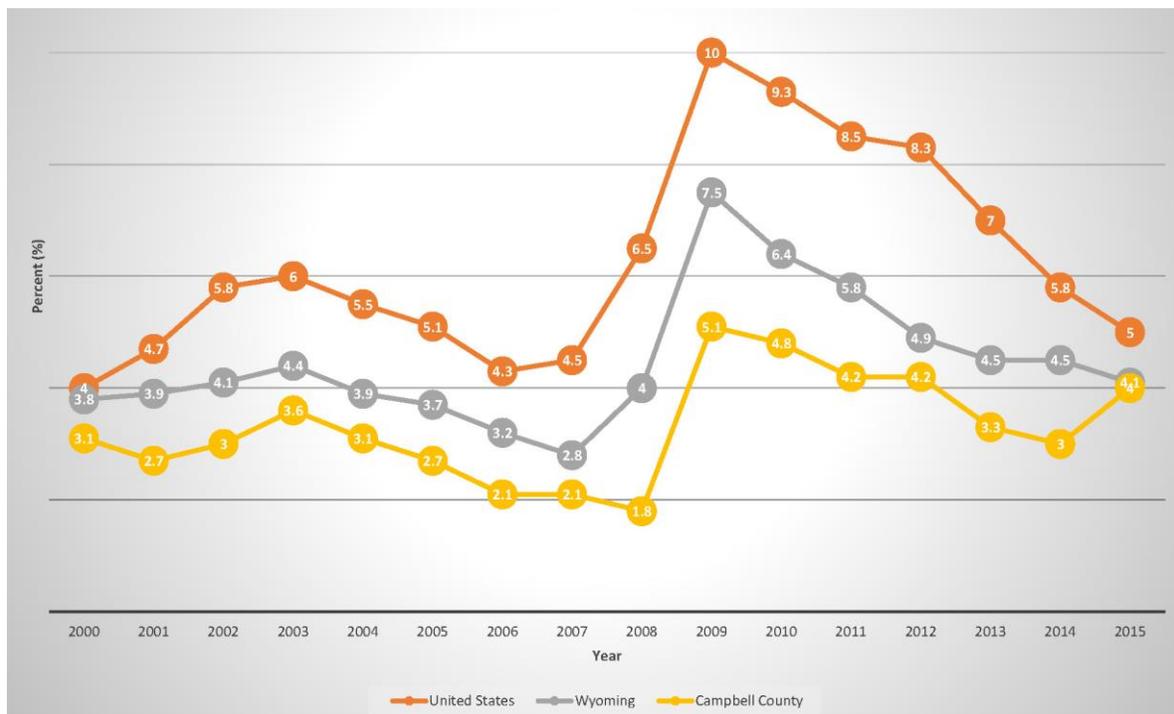
UNEMPLOYMENT DATA

US, Wyoming & Campbell County Unemployment Rates – 2000 to 2015*

Year	United States	Wyoming	Campbell County
2000	4.0	3.8	3.1
2001	4.7	3.9	2.7
2002	5.8	4.1	3.0
2003	6.0	4.4	3.6
2004	5.5	3.9	3.1
2005	5.1	3.7	2.7
2006	4.3	3.2	2.1
2007	4.5	2.8	2.1
2008	6.5	4.0	1.8
2009	10.0	7.5	5.1
2010	9.3	6.4	4.8
2011	8.5	5.8	4.2
2012	8.3	4.9	4.2
2013	7.0	4.5	3.3
2014	5.8	4.5	3.0
2015*	5.0*	4.1*	4.0*

*2015 Unemployment Rates as of November 30, 2015

Source: Wyoming Department of Workforce Services, Research & Planning





Construction of the New Marriott Townplace Suites Hotel near I-90 and Hwy 50



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