



2016 Developing Gillette

City of Gillette Development Summary

Through the End of the Fourth Quarter 2016



New Pronghorn Center at Gillette College

The *2016 Developing Gillette Annual Report* includes the City's 4th Quarter Development Summary.

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Energy Impacts

2016 was extremely challenging for the Gillette Area.

- Powder River Basin mines laid off several hundred employees as a result of bankruptcy, increased regulation and declining demand for coal.
- Natural gas prices remain low.
- Oil development in the Powder River Basin slowed dramatically.

Low demand, increased regulation and the loss of jobs associated with the depressed energy industry in Campbell County and the Powder River Basin significantly impacted Gillette's growth and development trends in 2016.

2016 Growth and Development Highlights

- The City's sales tax collections dropped by nearly 40% resulting in significant budget cuts and a reduction in the City's workforce.
- Campbell County School District No. 1 enrollment decreased by nearly 5% over the one-year period from October 2015 to October 2016.
- Revenues collected in recent "energy-boom" years were invested to continue and/or complete large-scale, publicly-funded building projects in 2016.
- Publicly-funded building projects for the School District and Gillette College are nearly complete.
- Private commercial and industrial development projects slowed dramatically in 2016.
- No major subdivisions were approved in 2016.
- The total valuation for all new commercial permits issued in 2016 was **\$28,705,078**.
- New housing permits for 2016 were significantly less than permits issued in 2015.
- The total valuation for all new housing permits issued in 2016 was **\$6,986,349**.
- The vacancy rate for apartments/rental units in the fourth quarter of 2016 increased to **26.5%** compared to **9.3%** for the fourth quarter of 2015.
- There are approximately **809** apartment/rental units currently available in Gillette.
- The vacancy rate for mobile/manufactured home units in manufactured home parks in the fourth quarter of 2016 increased to **15.9%** compared to **9.1%** for the fourth quarter of 2015.
- There are approximately **458** mobile/manufactured home units/lots in manufactured home parks currently available in Gillette.
- The incorporated area of the City of Gillette is **21.7** square miles.
- Gillette's population declined by over 2,000 people during a 12-month period from an historic high of **32,649** as of July 1, 2015 to less than **30,500** on July 1, 2016.
- The estimated population of the City of Gillette at the end of 2016 was **30,467**.
- The unemployment rate in Campbell County increased from **6.0%** in January 2016 to **8.1%** in May 2016 following the layoffs at several Powder River Basin mines.
- As of November 30, 2016, Campbell County's unemployment rate was **5.9%**.



New Student Housing at Gillette College

Commercial Project Horizon

Project	Status
Thunder Basin High School (expand CCHS So. Campus)	Under Construction
Stocktrail Elementary School	Construction Complete / CO Issued
Gillette College Pronghorn Center	Under Construction – to be complete early 2017
Gillette College Student Housing	Under Construction – to be complete early 2017
Legacy Living & Rehabilitation Center – Douglas Hwy	Construction Complete / CO Issued
New Apartment Complex – Lakeway and Hwy 50	Under Construction
Sportsman’s Warehouse – E. Lakeway Road	Construction Complete / CO Issued
Gillette College Rodeo & Ag Complex (East Boxelder)	Under Construction – To be complete early 2017
Fire Station No. 3 – Enzi Drive (South Fork Apts.)	Under Construction
Thunder Basin High School – Track, Field & Stadium	Under Construction

New Commercial Construction Permits 2011 – 2016

2016: 12	2016 Valuation: \$ 28,705,078
2015: 29	Valuation: \$78,254,824
2014: 23	Valuation: \$82,610,443
2013: 27	Valuation: \$30,643,901
2012: 30	Valuation: \$23,813,746
2011: 25	Valuation: \$23,272,779

**Commercial Additions and Alterations
2011 – 2016**

2016: 52	2016 Valuation: \$11,725,119
2015: 67	Valuation: \$41,655,772
2014: 90	Valuation: \$24,505,678
2013: 58	Valuation: \$10,323,461
2012: 78	Valuation: \$22,591,121
2011: 66	Valuation: \$14,327,599

*Does not include Commercial Re-Roof Projects.

Active Utility Account Comparison
End of Fourth Quarter Comparison of Active Utility Accounts by Service Type
2011 through 2016

Utility Service Type	End of Fourth Quarter					
	2011	2012	2013	2014	2015	2016
Electric						
Residential	12,456	12,618	12,729	12,885	13,212	13,123
Commercial	2,192	2,233	2,266	2,303	2,466	2,572
<i>Subtotal</i>	14,648	14,851	14,995	15,188	15,678	15,695
Water						
Residential	8,248	8,380	8,483	8,684	8,770	8,653
Commercial	1,404	1,468	1,482	1,507	1,610	1,662
<i>Subtotal</i>	9,652	9,848	9,965	10,191	10,380	10,315
Sewer						
Residential	9,769	9,910	10,001	10,214	10,299	10,380
Commercial	1,193	1,241	1,255	1,274	1,301	1,313
<i>Subtotal</i>	10,962	11,151	11,256	11,488	11,600	11,693
Trash						
Residential	9,957	10,103	10,175	10,399	10,403	9,920
Commercial	361	383	390	391	407	382
<i>Subtotal</i>	10,318	10,486	10,565	10,790	10,810	10,302
Yard Waste	1,645	1,811	1,866	1,967	2,075	2,062
Recycle	3,053	3,082	3,057	3,006	2,970	694
Active Customers						
Residential	13,019	13,154	13,249	13,424	13,780	13,840
Commercial	2,557	2,640	2,667	2,696	2,928	2,983
TOTAL	15,576	15,794	15,916	16,120	16,708	16,823

Source: City of Gillette Customer Service Division

Housing Horizon

New Housing

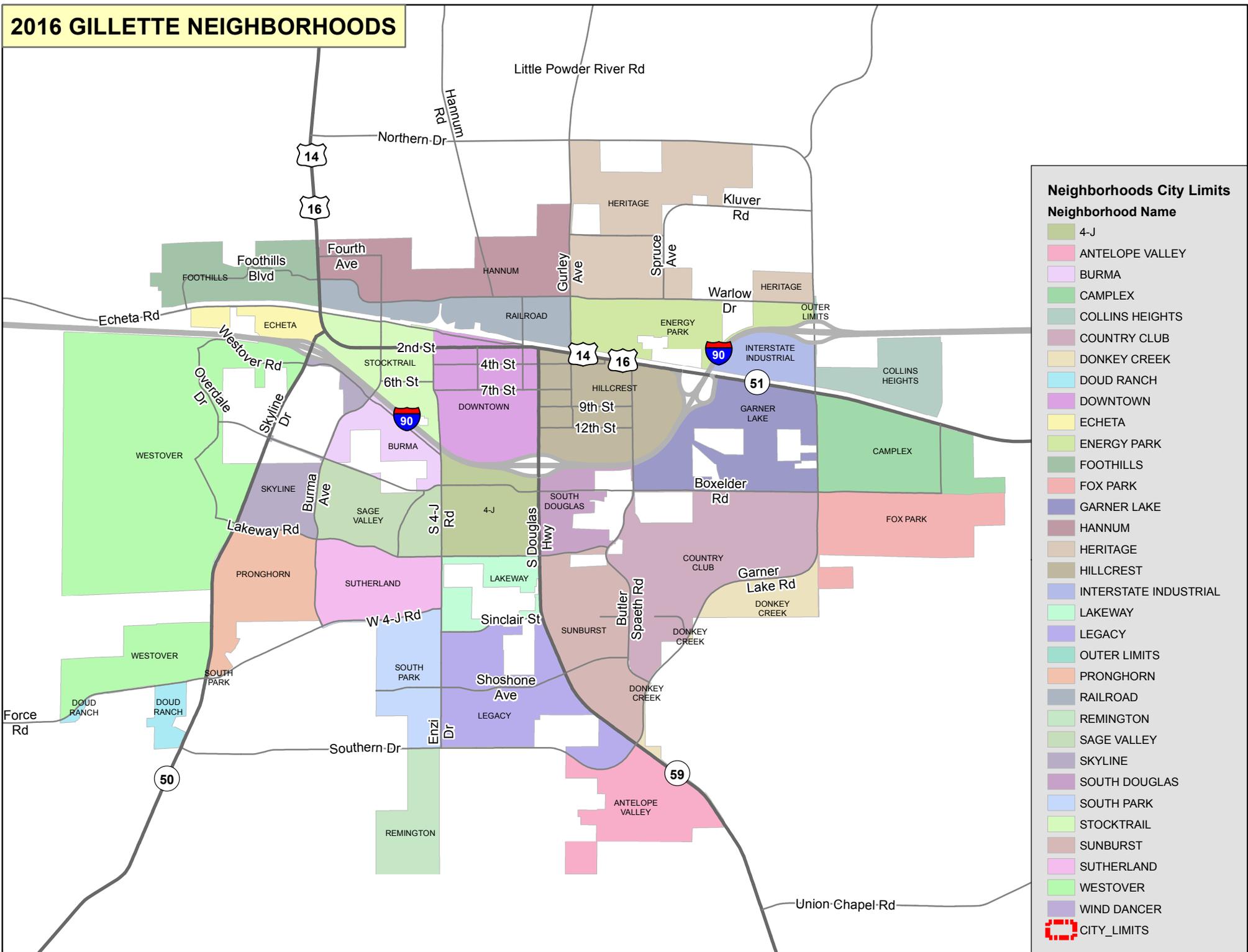
New Housing Units Permitted by Type and Neighborhood

January 1 – December 31, 2016

NEIGHBORHOODS (See Map)	Units Permitted This Year					Total Known Units		
	SFD	SFA	MH	MF	Year to Date	Single Family Units	All Other Units	Total All Units
4-J						649	332	981
ANTELOPE VALLEY						13		13
BURMA								
CAMPLEX								
COLLINS HEIGHTS						178		178
COUNTRY CLUB						301	121	422
DONKEY CREEK								
DOUD RANCH						105		105
DOWNTOWN						792	358	1,150
ECHETA						140		140
ENERGY PARK								
FOOTHILLS						757	341	1,098
FOX PARK						430		430
GARNER LAKE	2				2	52		52
HANNUM						235	123	358
HERITAGE			1		1	1,212	300	1,512
HILLCREST						984	539	1,523
INTERSTATE INDUSTRIAL						101		101
LAKEWAY	2				2	9		9
LEGACY						467	138	605
OUTER LIMITS								
PRONGHORN						161	173	334
RAILROAD						319	106	425
REMINGTON						224	216	440
SAGE VALLEY						652	15	667
SKYLINE						3		3
SOUTH DOUGLAS						9	141	150
SOUTH PARK						300	335	635
STOCKTRAIL						195	261	456
SUNBURST	1	12			13	559	1	560
SUTHERLAND						548	97	645
WESTOVER	1				1	887	92	979
WIND DANCER								
TOTAL For Year	7	12	1	0	19	10,283	3,689	13,972
% For Year	32%	63%	5%	0%	100%			

SFD = Single Family Detached // SFA = Single Family Attached (up to 3 units) // MH = Manufactured/Mobile Home // MF = Multi-Family (>= 4 units)

2016 GILLETTE NEIGHBORHOODS



- Neighborhoods City Limits**
- Neighborhood Name**
- 4-J
 - ANTELOPE VALLEY
 - BURMA
 - CAMPLEX
 - COLLINS HEIGHTS
 - COUNTRY CLUB
 - DONKEY CREEK
 - DOUD RANCH
 - DOWNTOWN
 - ECHETA
 - ENERGY PARK
 - FOOTHILLS
 - FOX PARK
 - GARNER LAKE
 - HANNUM
 - HERITAGE
 - HILLCREST
 - INTERSTATE INDUSTRIAL
 - LAKEWAY
 - LEGACY
 - OUTER LIMITS
 - PRONGHORN
 - RAILROAD
 - REMINGTON
 - SAGE VALLEY
 - SKYLINE
 - SOUTH DOUGLAS
 - SOUTH PARK
 - STOCKTRAIL
 - SUNBURST
 - SUTHERLAND
 - WESTOVER
 - WIND DANCER
 - CITY_LIMITS

Valuation: The total valuation for all new housing permits issued year-to-date is **\$6,986,349.00**.

**New Housing Units Permitted
2011 – 2016**

Year	Total New Housing Permits Issued
2016	19
2015	160
2014	183
2013	129
2012	210
2011	208

**Final Certificate of Occupancy Issued
2011 – 2016**

Year	Final Certificates of Occupancy Issued
2016	60
2015	138
2014	151
2013	140
2012	188
2011	303

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

**Residential Additions and Alterations*
2011 – 2016**

Year	Number of Permits	Valuation
2016	81	\$2,359,860
2015	134	\$2,970,439
2014	103	\$1,886,018
2013	105	\$2,391,665
2012	91	\$1,505,932
2011	80	\$1,701,568

*Does not include Residential Re-Roof Projects.

**Single Family Real Estate Summary - Total Active Residential Listings per Zip Code
End of Fourth Quarter 2016 as of 12/30/2016 @ 11:30 am**

Price Range		82716	82718	Combined Total
\$ 0.00	\$ 99,999.99	13	10	23
\$ 100,000.00	\$ 199,999.99	88	78	166
\$ 200,000.00	\$ 299,999.99	50	72	122
\$ 300,000.00	\$ 399,999.99	7	38	45
\$ 400,000.00	\$ 499,999.99	1	8	9
\$ 500,000.00	\$ 599,999.99	1	2	3
OVER	\$ 600,000.00	2	6	8
TOTAL		162	214	376

Source: Campbell County Board of Realtors and the Multiple Listing Service (MLS)

Rental Vacancy Rates

The vacancy rate for apartments/rental units in the fourth quarter of 2016 has increased to **26.5%** compared to **26.0%** in the third quarter of 2016, and **9.3%** for the fourth quarter of 2015. There are approximately **445** 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 2016 has increased to **15.9%** compared to **15.7%** in the third quarter of 2016, and **9.1%** for the fourth quarter of 2015. There are approximately **227** mobile/manufactured home units/lots in manufactured home parks currently available in the rental stock surveyed in Gillette.

Rental Vacancy Rate by Quarter 2011 – 2016 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	0.7	1.3	1.9%
2015	3.7	5.9	8.2	9.3	6.8%
2016	12.0	22.4	26.0	26.5	21.7%
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%
2016	9.9	22.6	15.7	15.9	16.0%

Sample Size 4th Qtr 2016: apartments/other residential rental buildings = 1,677; manufactured/mobile homes in parks = 1,431 units. Apartments/rental units sample size makes up approximately 55% of all known units. Manufactured/mobile home sample size makes up approximately 50% of all known units.

The **combined, weighted-average rental vacancy rate** for all rental stock surveyed at the end of the fourth quarter of 2016 is **21.6%**.

2016 Subdivision Plats, Annexations & Commercial Site Plans

The City processed and approved over 33 development and subdivision cases in 2016.

Type	Number
Annexations	1
Minor Subdivision Plats (< 5 lots)	21
Major Subdivision Plats	0
Development Plans / Commercial Site Plans	11

Note: Minor Subdivision Plats (< 5 lots) includes Conventional Plats, Administrative Plats, Condo Plats and PUD Plats for 2016

One (1) annexation was completed in 2016. 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
Aspen Heights Annexation	9/6/2016; Ord. 3901	0.50 acres / R-2 zoning 4.49 acres / C-1 zoning	0	0

2016 Gillette Area Public Improvement Projects

Major public projects, either completed or ongoing throughout the Gillette Community in 2016 include:

- Downtown Restrooms and Parking Enhancements / Third Street Plaza (City of Gillette)
- Boxelder Extension –Hwy 50 to Overdale (WYDOT on behalf of the City of Gillette)
- Multiple street and pavement management projects (City of Gillette)
- Multiple sidewalk & pathways projects (City of Gillette)
- Water System Improvements (City of Gillette)
- Sanitary Sewer Improvements (City of Gillette)
- Fiber Optics and Electrical Transmission/Distribution Improvements (City of Gillette)
- Landfill & Recycle Center Improvements (Campbell County)
- Gillette College Pronghorn Center (Campbell County / Gillette College)
- Gillette College Student Housing (City of Gillette / Gillette College)
- Gillette College Rodeo Practice Facility (Campbell County / Gillette College)
- Legacy Living and Rehabilitation Center (Campbell County Hospital)
- Fire Station No. 3 on Enzi near Southfork Apartments (City of Gillette / Campbell County)
- New Stocktrail Elementary School (Campbell County School District #1)
- New Thunder Basin High School / Expansion of CCHS South Campus (CCSD#1)
- New Thunder Basin High School Track, Field & Stadium (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 \$20M per year (countywide) 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 New Thunder Basin High School Track, Field & Stadium

Major construction contracts associated with the Gillette Regional Water Supply Project, either completed or ongoing in 2016 include:

- Completion of the new water treatment facility near Pine Ridge in Crook County
- Completion of regional water line extensions for the Force Road and Cook Road areas
- Completion of regional water line extensions for the Crestview / Antelope Valley Areas
- Construction of the 42-inch Transmission Main between Moorcroft and Pine Ridge
- Construction of the new water transmission pumping facility near Rozet
- Construction of a new water tank near Pine Ridge in Crook County
- Construction of three additional wells near Pine Ridge in Crook County

Population

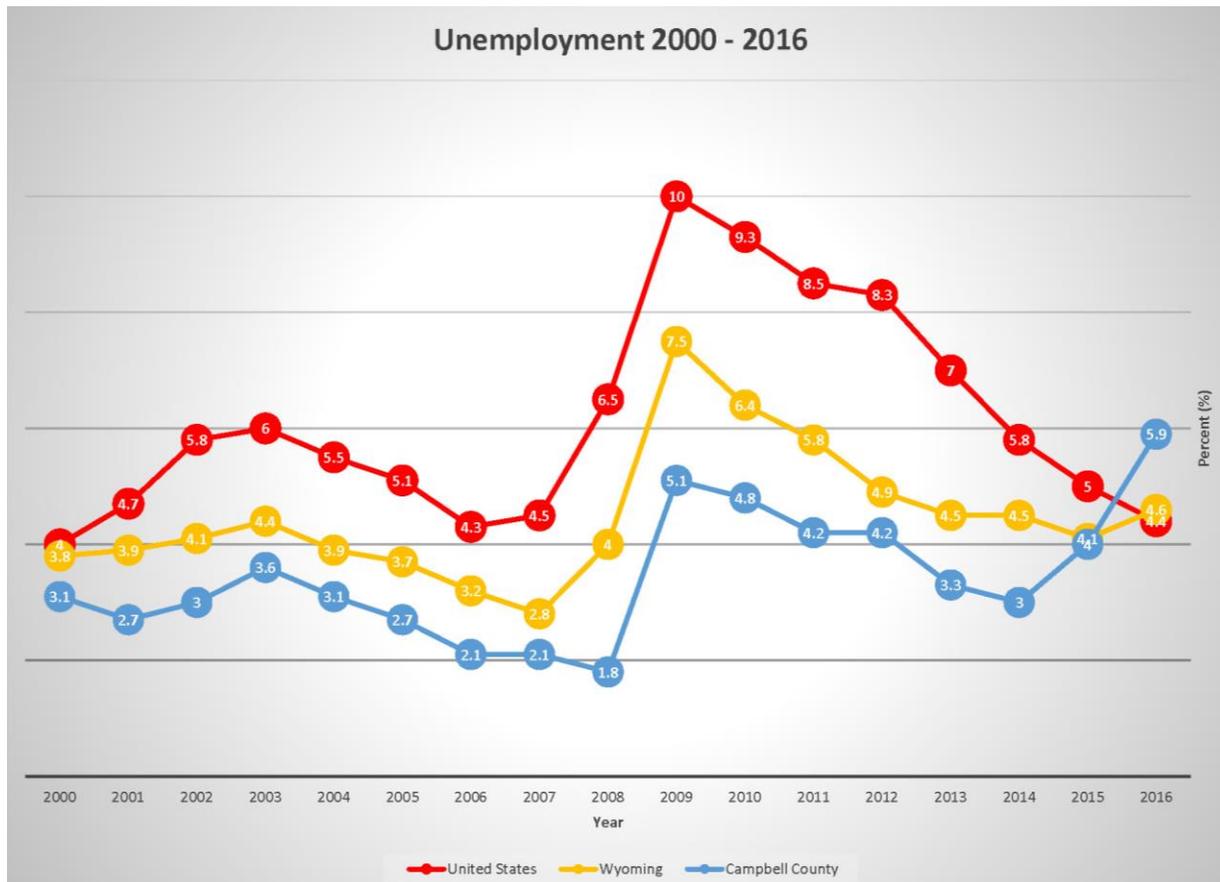
The City Planning Division's "unofficial" population estimate for the City of Gillette as of December 31, 2016 is **30,467**. The following table summarizes the population for Wright, Gillette and Unincorporated Campbell County since 2010.

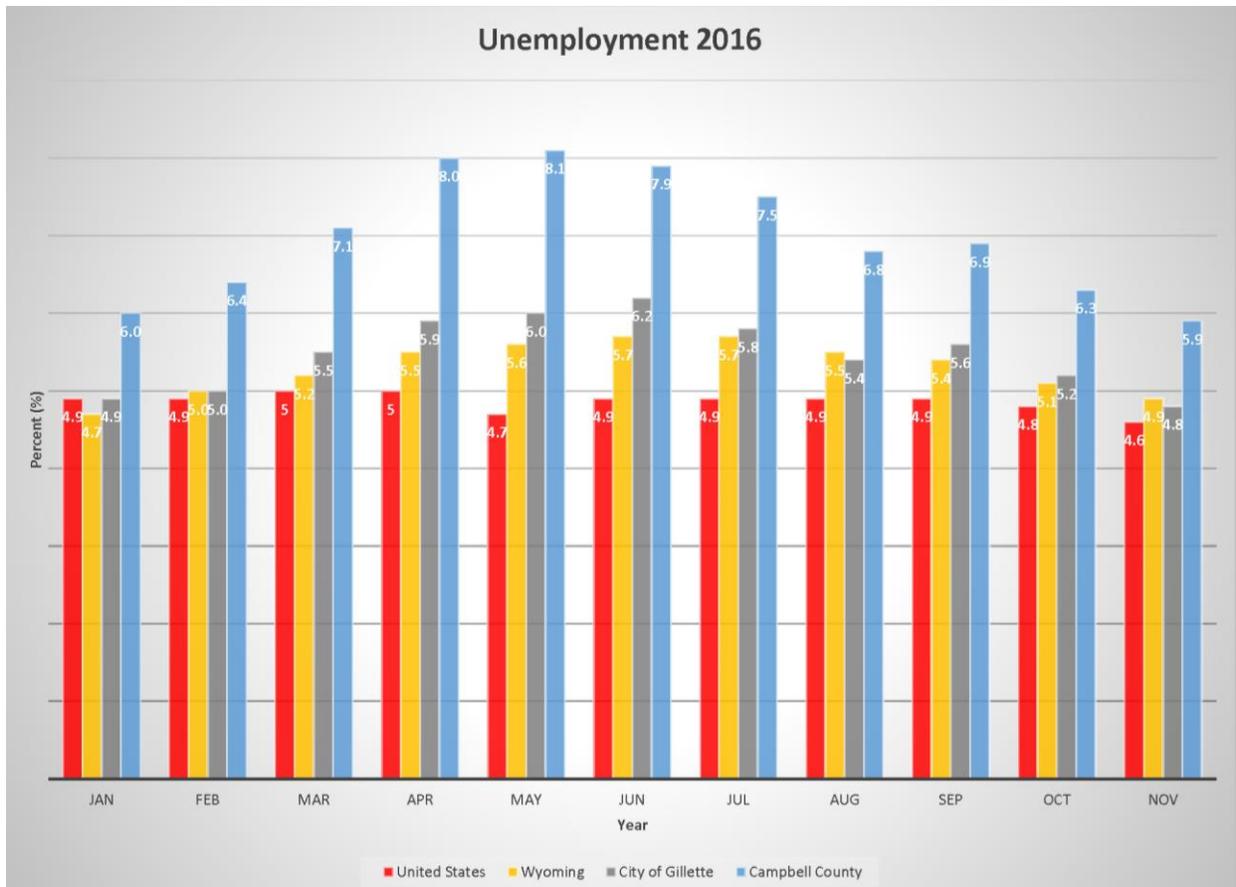
Place	Population Estimate (as of July 1)							2016 Gillette City Staff Population Estimate
	2010	2011	2012	2013	2014	2015		
						Estimate	Percent of Total County	
Campbell County	46,244	46,600	47,881	48,121	48,243	49,220	100.000%	30,467
Unincorporated	14,483	14,359	14,603	14,539	14,479	14,709	29.884%	
City of Gillette	29,954	30,432	31,423	31,732	31,920	32,649	66.333%	
Town of Wright	1,807	1,809	1,855	1,850	1,844	1,862	3.783%	

*Source: U.S. Census Bureau, Population Division
Release Date: May 2016*

Unemployment

The unemployment rate for the City of Gillette is 4.8% as of November 30, 2016. The unemployment rate for Campbell County is 5.9% as of November 30, 2016. By comparison, the national unemployment rate is 4.6% and the statewide unemployment rate for Wyoming is 4.9% for the same period.





*2016 Unemployment Rates as of November 30, 2016
 Source: Wyoming Department of Workforce Services, Research & Planning



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