



**CITY OF CHEYENNE**  
**CDBG Community Development Block Grant**  
**Amended Annual Action Plan**  
**Program Year 2024**



**ADMINISTERED BY: THE DIVISION OF HOUSING & COMMUNITY DEVELOPMENT**

This amendment reallocates funds from Habitat for Humanity's Acquisition & Rehabilitation project to the City of Cheyenne's Optimist Park Playground project due to timeline constraints. Habitat for Humanity returned \$291,000 in CDBG funds and \$43,973.63 from their Home Rehabilitation Program grant. The City of Cheyenne Housing & Community Development Advisory Council, in collaboration with the Community, Recreation, and Events Department, identified the Optimist Park playground renovation as a high-impact project in a low-to-moderate-income neighborhood in South Cheyenne. The \$291,884 in CDBG funds will be redirected to support this playground renovation, serving multiple low-to-moderate-income Block Groups in the Southside area. The returned \$43,973.63 from Habitat for Humanity's home rehabilitation maintenance funds will be reallocated to support other critical community projects in Cheyenne for Program Year 2025.

## **Executive Summary**

### **AP-05 Executive Summary - 24 CFR 91.200(c), 91.220(b)**

#### **1. Introduction**

The Community Development Block Grant (CDBG) program, administered by the U.S. Department of Housing and Urban Development (HUD), is a vital federal initiative that supports the City of Cheyenne in addressing local community development needs. Since becoming an Entitlement City in 1975, Cheyenne has directly received annual CDBG funds managed by the city's Housing & Community Development (H&CD) Division in compliance with HUD's Code of Federal Regulations 24 CFR Part 570. This program offers eligible 501(c)(3) agencies a significant opportunity to apply for funding to support the city's low-to-moderate-income population. The allocation process for CDBG funds ensures that all activities align with HUD's National Objectives and primarily benefit low-and-moderate-income individuals.

The H&CD Division is committed to leveraging CDBG resources to promote sustainable community development efforts, including housing, public improvements, and essential services for those in need. The City of Cheyenne is mandated to develop a Consolidated Plan (Con Plan) and an Annual Action Plan (AAP) to outline the use of CDBG funds. The AAP includes objectives and outcomes, citizen participation processes, and funding allocations, and it is subject to public hearings and comment periods. The 2024 AAP represents the last year of the city's 2020-2024 Five-Year Con Plan. The AAP is prepared per the 24 CFR Part 91 Consolidated Community Planning and Development Programs Submission. It must be submitted to HUD for final approval before receiving annual allocations of HUD funding.

***Amendment:*** In October 2024, the Housing & Community Development Advisory Council voted unanimously to substantially amend the Annual Action Plan for Program Year 2024. This amendment addresses changes to the initially approved action plan by removing the Habitat for Humanity

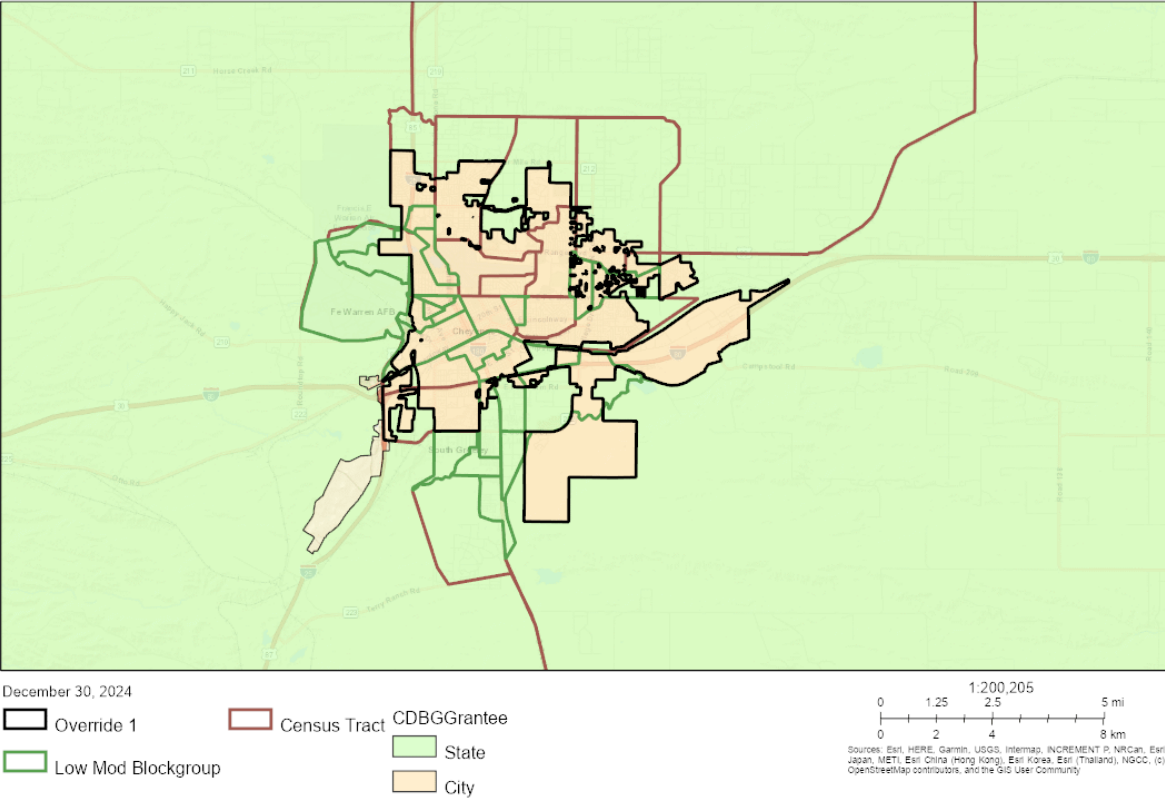
*Acquisition & Rehabilitation project and replacing it with the City of Cheyenne, Community, Recreation, & Events Department's Optimist Park Playground project. In October 2024, Habitat for Humanity of Laramie County returned the \$291,000 CDBG grant awarded due to project timeline constraints and funding period limitations.*

*In response to this development, the City of Cheyenne Housing & Community Development Advisory Council, in collaboration with the Community, Recreation, and Events Department, identified a high-impact area benefit project in a low-to-moderate-income neighborhood to complete with the returned funds. The Optimist Park playground renovation was selected because it is in South Cheyenne, a historically low-income census tract adjacent to two other low-income tracts. This project can potentially serve multiple low-to-moderate-income Block Groups in the Southside area.*

*The Optimist Park project was initially awarded \$75,000 in Program Year 2021. However, the city could not cover the additional costs of the playground renovation. The original project budget was \$240,000; however, rising construction material and labor costs have increased the estimated total project costs to between \$300,000 and \$320,000.*

*With the cancellation of the Habitat project, \$291,884 in CDBG funds has become available and will be redirected to support the renovation of the Optimist Park playground. This amendment aims to maximize the impact of CDBG funds by providing a much-needed recreational facility in a low-income area, ultimately benefiting multiple low-to-moderate-income families in South Cheyenne.*

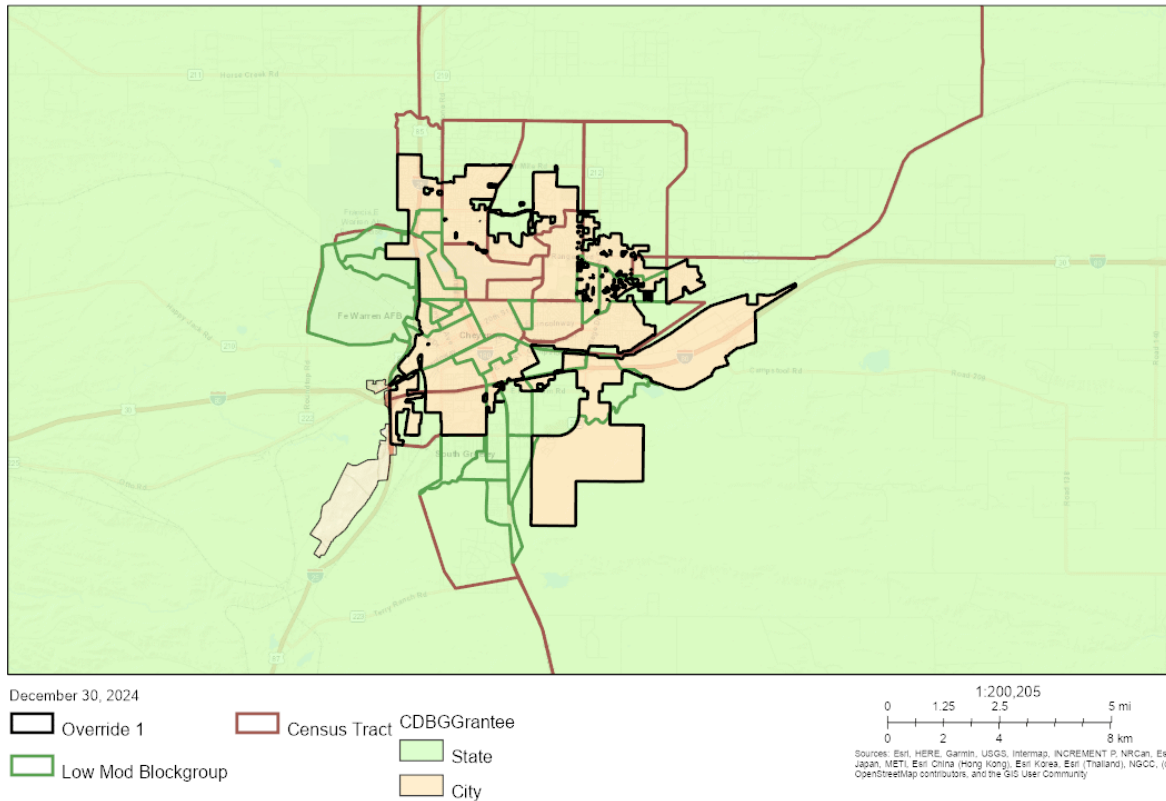
Cheyenne LMI Block Groups and Tracts Map - Consolidated Plan and Continuum of Care Planning Tool



CPD Maps - Consolidated Plan and Continuum of Care Planning Tool



## Cheyenne LMI Block Groups and Tracts Map - Consolidated Plan and Continuum of Care Planning Tool



## Cheyenne LMI Block Groups and Tracts Map - Consolidated Plan and Continuum of Care Planning Tool

### 2. Summarize the objectives and outcomes identified in the Plan

This could be a restatement of items or a table listed elsewhere in the plan or a reference to another location. It may also contain any essential items from the housing and homeless needs assessment, the housing market analysis or the strategic plan.

Below is a summary of the funded activities for PY24 and the HUD requirements they meet. These activities meet national objectives, plan goals, performance objectives, and performance outcomes.

**Amendment:** *The Optimist Park Playground project has replaced the Habitat for Humanity of Laramie County Inc. Acquisition and Rehabilitation project with the City of Cheyenne, Community, Recreation, & Events Department's Optimist Park Playground project.*

### Safehouse Services

- \$10,000 for Victim Assistance (Anticipated 60 clients will be served).
- \$17,000 for Utility Assistance. (Anticipated 375 clients will be served).
- National Objective: to benefit L/M Income Limited Clientele.

- Con Plan goals: Promote self-sufficiency through service.
- Performance Objective: Suitable Living Environment: The activity benefits communities, families, or individuals by addressing issues in their living environment.
- Performance Outcome: Affordability: The activity provides affordability in various ways, including the creation/maintenance of affordable housing or services such as food boxes/daycare.

#### **Equal Justice Wyoming Foundation (EJWF)**

- \$18,000 to provide Civil Legal Services to benefit LMI residents of Cheyenne. (Anticipated 25 - 40 clients will be served).
- National Objective: to benefit L/M Income Limited Clientele.
- Con Plan Goals: Promote self-sufficiency through service provision.
- Performance Objective: Suitable Living Environment: The activity benefits communities, families, or individuals by addressing issues in their living environment.
- Performance Outcome: Availability / Accessibility: Activity that makes services, infrastructure, or shelter available and accessible.

#### **Needs Inc.**

- \$20,000 to provide Crisis Food (Anticipated to serve 2,000 clients).
- National Objective: to benefit low-to-moderate-income individuals.
- Con Plan Goal: to provide increased public services.
- Performance Objective: Suitable Living Environment: The activity benefits communities, families, or individuals by addressing issues in their living environment.
- Performance Outcome: Affordability: The activity provides affordability in various ways, including the creation/maintenance of affordable housing or services such as food boxes/daycare.

#### **Habitat for Humanity of Laramie County Inc. (HFHLCI)**

##### **Home Rehabilitation**

- \$88,409 for Home Rehabilitation for the Habitat Home Repairs Program. (Anticipates serving 10-30 unduplicated clients.)
- National Objective: to benefit low- and moderate-income people.
- Con Plan Goals: Provide safe, decent affordable housing.
- Performance Objective: Suitable Living Environment: The activity benefits communities, families, or individuals by addressing issues in their living environment.
- Performance Outcome: Affordability: The activity provides affordability in various ways, including creating/maintaining affordable housing or services such as food boxes or daycare.

### ***Amendment: Optimist Park Playground Project***

- *\$291,884 to preserve and improve low-income neighborhoods by installing a new ADA-compliant playground in South Cheyenne.*
- *National Objective: Benefit low- and moderate-income people*
- *Con Plan Goal: Preserve and Improve Low-Income Neighborhoods.*
- *Con Plan Goal Description: Public Facilities or Infrastructure Activities other than Low-Moderate Income Housing Benefit.*
- *Con Plan Performance Objective: Create a Suitable Living Environment*
- *Con Plan Priority Need Addressed: Neighborhood Improvements or Infrastructure.*

### **3. Evaluation of past performance**

This is an evaluation of past performance that helped lead the grantee to choose its goals or projects.

Evaluating past performance has been instrumental in guiding the city towards setting its goals and projects. By reviewing the achievements and challenges of the CDBG program, the H&CD Division has strategically positioned itself to make significant progress toward the long-term objectives and priorities outlined in the 2020-2024 Con Plan. The CDBG Program year aligns with the city's fiscal year, from July 1 to June 30. The AAP grant cycle for PY24 will start on July 1, 2024, and end on June 30, 2025. The H&CD Division is required to complete a Consolidated Annual Performance and Evaluation Report (CAPER). This report, submitted to HUD, tracks the city's progress toward meeting its annual performance goals at the end of each program year. The most recent CAPER for PY22 highlights significant progress in meeting Con Plan goals in several areas, including preserving and improving low-income neighborhoods through public facility infrastructure improvements, promoting self-sufficiency through service provision, and providing public facilities assistance to homeless overnight shelters.

During PY22, CDBG funds assisted 569 individuals/families, including new beneficiaries, the elderly, those with disabilities, and female heads of households. Despite these successes, the city faced challenges in meeting its goal of providing low- and moderate-income (LMI) households with home rehabilitation, with only two households served against an annual goal of twelve. Habitat for Humanity of Laramie County (HFHLC) received CDBG funding to coordinate rehabilitation for LMI homeowners through their Home Repairs Program. They faced challenges due to a shortage of Sam. gov-certified contractors and increased applications from city residents.

Evaluating the CDBG program's performance trends from recent years has helped H&CD staff identify areas for improvement. Some challenges include fewer new applicants for CDBG funds, agencies struggling with the capacity to manage CDBG projects, inflated cost of labor and construction materials impacting the effectiveness of the limited allocation of CDBG funds received by the city, and low citizen participation.

The H&CD Division is exploring various strategies to utilize the limited allocation more effectively, such as setting project award floors, limiting projects to specific city areas, and prioritizing projects that leverage other funding sources. Despite having a comprehensive citizen participation plan in place, comments are rarely received, and participation in public meetings is primarily from citizens representing agencies awarded funding. The H&CD staff is part of a newly formed Community Engagement Task Force, which aims to develop resources and processes to improve community engagement and encourage citizen participation. Evaluating past and current challenges that hinder sub-recipient projects is crucial for developing communication procedures and processes to support sub-recipients through project challenges. Current CDBG projects, such as the HFHLC 10th Street Rehabilitation project and the Comea Homeless Shelter dormitory expansion project, face unexpected challenges. Still, the H&CD staff continues to work with sub-recipients to find solutions.

In summary, past performance evaluation, exploration of new ways to better utilize funding, more effective communication with sub-recipients, local agencies, and organizations, and enhanced citizen engagement will provide essential information to assist H&CD staff and the Advisory Council in developing the 2025-2029 Con Plan goals that meet HUD National Objectives and are relevant, realistic, and achievable.

#### **4. Summary of Citizen Participation Process and consultation process**

Summary from citizen participation section of plan.

In the fall of 2023, the city launched its citizen participation and consultation process for PY24. The H&CD Division hosted an information session on October 4, 2023, inviting nonprofit agencies to learn about the grant cycle, discuss eligible projects, and view a presentation about the CDBG program. The Community Development Manager (CDM) explained that the anticipated funding allocation was based on the previous year's allocation of \$448,011 and was contingent on HUD's allocation notification. The PY24 grant cycle began with a deadline for submitting letters of intent by October 20, 2023, with five organizations submitting eight letters of intent. The H&CD Advisory Council met on November 1, 2023, to review the letters of intent and assess their alignment with the city's Consolidated Plan goals. Public engagement was encouraged with a notice in the Wyoming Tribune Eagle on October 25, 2023, announcing a Public Hearing on November 1, 2023. This hearing, accessible in person and via Zoom, invited city residents to review and comment on grant proposals for the 2024 Program Year. Representatives from all organizations that submitted letters of intent attended the Public Hearing, and the Advisory Council invited each of them to apply for funding. Four of the five organizations applied, submitting a total of six applications. These applications were reviewed during the February 7, 2024, council meeting, and CDBG funding was recommended for all six projects.

The city's PY24 AAP 30-day public comment period began on April 7, 2024, and ended on May 6, 2024. The Plan's Public Comment period offered citizens multiple opportunities to provide feedback on the plan. The Public Notice was disseminated through various channels, including the local newspaper, the City Website, and social media. Additionally, notifications were emailed on March 14, 2024, to the

Laramie County Community Partnership to over 250 residents. Public meetings and hearings were conducted on April 22, 2024, and May 6, 2024, to encourage citizen participation. The venues where the meetings were held are accessible and offer special accommodations upon request.

A notice was published on Saturday, April 6th, announcing the start of a 30-day public comment period for the Annual Action Plan (AAP) beginning April 7, 2024, and ending on May 6, 2024. An affidavit confirming this announcement has been attached to the AAP documentation.

Printed copies of the AAP were available for review at the City Clerk's office, the Mayor's office, and the Laramie County Library. Electronic copies were available on the city's H&CD Division webpage. The notice included information about the Public Hearing held on April 22, 2024. This information was announced during the City Council meeting on April 8, 2024. The final opportunity for public comment was during the Finance Committee meeting held on May 6, 2024.

**Amendment:** The City initiated a 30-day public comment period, making the plan accessible both online and in-person. To ensure widespread accessibility, outreach efforts were conducted through various channels. This process complies with 24 CFR Part 91.505 regulations. For a comprehensive list of public comments received regarding this amendment, please refer to the attached document: "12-26-24 Affidavit & Public Comments and Notice for the AAP PY24 Amendment.pdf".

## **5. Summary of public comments**

This could be a brief narrative summary or reference an attached document from the Citizen Participation section of the Con Plan.

The Housing & Community Development Division (H&CD) received three comments during the Public Hearing during the City Council meeting on April 22, 2024. Executive Directors from Equal Justice Wyoming, Habitat for Humanity of Laramie County, and Needs Inc. provided in-person, public comments during the meeting. Their comments addressed CDBG funds' impact on their organizations and the increased demand for food assistance, legal services, and affordable housing in Cheyenne.

Ten respondents participated in a survey requesting input on the AAP. A link to the survey was shared with multiple organizations and agencies in Cheyenne and was posted on the H&CD website. Generally, respondents supported using CDBG funds to help LMI and vulnerable populations. Some respondents provided information about local non-profits and services. Most respondents ranked the goals for Program Year 2024 as *Very Important* or *Extremely Important*. Overall, respondents were pleased with the H&CD and consultation activities and supported prioritizing citizen participation in determining funding allocation for activities. Respondents commented that additional tools and resources are needed to support LMI residents in Cheyenne better. A recommendation to hold listening sessions and

public meetings in facilities located in targeted geographical areas and to publicize public meetings in local food banks will be incorporated into H&CD Division's public outreach strategy in the future.

**Amendment:** *For a comprehensive list of public comments, please refer to the attached document: "12-26-24 Affidavit & Public Comments and Notice for the AAP PY24 Amendment.pdf".*

## **6. Summary of comments or views not accepted and the reasons for not accepting them**

Please see the Citizen Participation Comment Attachment which contains a complete summary of received comments and responses to the Program Year 2024 Annual Action Plan Survey.

**Amendment:** All comments and views received were accepted. For a comprehensive list of public comments regarding this amendment, please refer to the attached document: "12-26-24 Affidavit & Public Comments and Notice for the AAP PY24 Amendment.pdf".

## **7. Summary**

Since 1975, Cheyenne has utilized CDBG funds, managed by the City of Cheyenne's Housing & Community Development Division, to support low- and moderate-income individuals through housing, public improvements, and essential services. The objectives and outcomes in this AAP mark the culmination of the city's 2020-2024 Five-Year Con Plan. Despite challenges like project delays, a lack of new applicants, and low citizen participation, past performance evaluation reveals progress towards the goals set in the Con Plan. While there is a clear need for increased community outreach, the city's current citizen participation process for this year's AAP included public hearings, comment periods, and extensive outreach efforts. These efforts ensured opportunities for community input and citizen participation. The Housing & Community Development Division is committed to analyzing past performance to identify areas of improvement and to exploring new ways to utilize CDBG funds to address the needs of Cheyenne's LMI city residents and meet future goals that align with HUD National Objectives and are relevant, realistic, and achievable.

## PR-05 Lead & Responsible Agencies – 91.200(b)

### 1. Agency/entity responsible for preparing/administering the Consolidated Plan

Describe the agency/entity responsible for preparing the Consolidated Plan and those responsible for administration of each grant program and funding source.

Agency Role		Name	Department/Agency
Lead Agency		CHEYENNE	
CDBG Administrator	CHEYENNE		Housing & Community Development Division
HOPWA Administrator			
HOME Administrator			
HOPWA-C Administrator			

**Table 1 – Responsible Agencies**

### Narrative (optional)

The Housing & Community Development Division (H&CD) is committed to enhancing coordination among public and assisted housing providers and private and governmental health, mental health, and service agencies. H&CD collaborates with the Cheyenne Housing Authority, Cheyenne Regional Medical Center, Laramie County Community Partnership, Needs Inc., COMEA Shelter, Safehouse Services, and the Wyoming Homeless Collaborative. This collaboration aims to identify and address the essential needs and challenges of vulnerable populations in Cheyenne. The Community Development Manager (CDM) participates in the Laramie County Community Partnership’s Housing Task Force meetings. The H&CD staff communicates with the City of Cheyenne’s Affordable Housing Task Force members, who make specific recommendations to the Mayor and City Council to remove barriers and support affordable housing development. The CDM participates in the Wyoming Homeless Collaborative meetings to further strengthen coordination and address the needs of those at risk of homelessness. Furthermore, the CDM consults regularly with the COMEA Shelter and Safehouse Services, two sub-recipients of CDBG funds who provide emergency shelter for those at risk of or experiencing homelessness. Safehouse Services also offers support for individuals and families overcoming abuse. This collaborative framework is crucial for identifying goals and tackling the challenges faced by vulnerable populations in Cheyenne.

In 2024, the CDM plans to consult with Wyoming 211, Wyoming Coalition for the Homeless, HealthWorks, Magic City, Unaccompanied Student Initiative, and Volunteer of America-Veterans Services.

- Wyoming 211 is a local nonprofit that facilitates coordination efforts by connecting individuals to community resources, including housing and mental health services.
- Magic City Enterprises empowers individuals with intellectual and developmental disabilities through various services.
- The Wyoming Coalition for the Homeless operates the Welcome Mat Day Center in Cheyenne, providing a positive, caring environment for those in need. It is a haven where homeless individuals are accepted without judgment and find community, friendship, and encouragement.
- HealthWorks offers medical, dental, mental health & pharmacy services.
- The Unaccompanied Students Initiative (USI) provides a safe and stable home environment for students aged 16-20 who are experiencing homelessness. By offering secure housing and support, USI aims to encourage these students to graduate and assist them with preparations for real life, ensuring they have the foundation needed to succeed beyond high school.
- Volunteers of America Northern Rockies (VOANR) is a certified and CARF-accredited organization that provides a wide range of critical health and human services to thousands of vulnerable individuals and families across the Northern Rockies, including Wyoming. Their services aim to inspire self-sufficiency, dignity and hope among veterans by addressing their social needs, which include mental health services, housing assistance, assistance for those with disabilities, family-focused treatment, and support for reintegrating formerly incarcerated individuals back into society.

The H&CD Division is committed to creating a more inclusive and supportive community through strategic partnerships with local housing authorities, healthcare providers, and service agencies. The division remains dedicated to fostering safe, stable, and affordable housing solutions as we continue to identify and implement strategies that enhance our community's well-being.

### **Consolidated Plan Public Contact Information**

Amy Gorbey, Community Development Manager, 2101 O'Neil Avenue, Mayor's Office, 3rd Floor, Cheyenne, WY 82001. Phone: (307) 637-6255  
Email: [agorbey@cheyennecity.org](mailto:agorbey@cheyennecity.org)



## **AP-10 Consultation – 91.100, 91.200(b), 91.215(l)**

### **1. Introduction**

The Housing & Community Development Division (H&CD) is committed to enhancing coordination among public and assisted housing providers and private and governmental health, mental health, and service agencies. H&CD collaborates with the Cheyenne Housing Authority, Cheyenne Regional Medical Center, Laramie County Community Partnership, Needs Inc., Comea Shelter, Safehouse Services, and the Wyoming Homeless Collaborative. This collaboration aims to identify and address the essential needs and challenges of vulnerable populations in Cheyenne. The Community Development Manager (CDM) participates in the Laramie County Community Partnership's Housing Task Force meetings. The H&CD staff communicates with the City of Cheyenne's Affordable Housing Task Force members, who make specific recommendations to the Mayor and City Council to support affordable housing development. The CDM participates in the Wyoming Homeless Collaborative meetings to further strengthen coordination and address the needs of those at risk of homelessness. Furthermore, the CDM consults regularly with the COMEA Shelter and Safehouse Services, two sub-recipients of CDBG funds who provide emergency shelter for those at risk of homelessness. Safehouse Services also offers support for individuals and families overcoming abuse. This collaborative framework is crucial for identifying goals and tackling the challenges faced by vulnerable populations in Cheyenne.

In 2024, the CDM plans to consult with Wyoming 211, Wyoming Coalition for the Homeless, HealthWorks, Magic City, Unaccompanied Student Initiative, and Volunteer of America-Veterans Services.

- Wyoming 211 is a local nonprofit that facilitates coordination efforts by connecting individuals to community resources, including housing and mental health services.
- Magic City Enterprises empowers individuals with intellectual and developmental disabilities through various services.
- The Wyoming Coalition for the Homeless operates the Welcome Mat Day Center in Cheyenne, providing a positive, caring environment for those in need. It is a haven where homeless individuals are accepted without judgment and find community, friendship, and encouragement.
- HealthWorks offers medical, dental, mental health & pharmacy services.
- The Unaccompanied Students Initiative (USI) provides a safe and stable home environment for students aged 16-20 who are experiencing homelessness. By offering secure housing and support, USI aims to encourage these students to graduate and assist them with preparations for real life, ensuring they have the foundation needed to succeed beyond high school.
- Volunteers of America Northern Rockies (VOANR) is a certified and CARF-accredited organization that provides a wide range of critical health and human services to thousands of vulnerable individuals and families across the Northern Rockies, including Wyoming. Their services aim to inspire self-sufficiency, dignity and hope among veterans by addressing their

social needs, which include mental health services, housing assistance, assistance for those with disabilities, family-focused treatment, and support for reintegrating formerly incarcerated individuals back into society.

The H&CD Division is committed to creating a more inclusive and supportive community through strategic partnerships with local housing authorities, healthcare providers, and service agencies. The division remains dedicated to fostering safe, stable, and affordable housing solutions as we continue to identify and implement strategies that enhance our community's well-being.

**Provide a concise summary of the jurisdiction's activities to enhance coordination between public and assisted housing providers and private and governmental health, mental health and service agencies (91.215(I))**

The H&CD Division actively consults with and participates in several collaborative efforts to enhance coordination between public and assisted housing providers and private and governmental health, mental health, and service agencies. The CDM engages with the Laramie County Community Partnership (LCCP) Housing Action Team to share resources and address housing needs, focusing on initiatives for supportive housing that is affordable, safe, and sustainable. The task force members include representatives from Habitat for Humanity of Laramie County, My Front Door, Equal Justice Wyoming, the Southeast Wyoming Builders Association, Community Action of Laramie County, and others. They work on issues such as establishing a city/county housing trust fund, developing a tenant's rights and responsibilities document for rental agreements, and recommending Unified Development Code changes to promote affordable housing development.

The CDM held meetings with the Executive Director of Cheyenne Housing Authority (CHA) in January and March 2024. The Executive Director shared the current waitlist numbers for the Public Housing and Housing Choice Voucher programs for Cheyenne residents. It was mutually agreed that conducting an objective study on the impediments to Fair Housing in Cheyenne would benefit both organizations. This study aims to identify barriers to help agencies formulate strategies to address Cheyenne's specific fair housing needs. The Executive Director of CHA also provided contact information to the CDM so that Wyoming Community Development staff could assist in finding an independent entity to analyze impediments to fair housing in our municipality.

**Describe coordination with the Continuum of Care and efforts to address the needs of homeless persons (particularly chronically homeless individuals and families, families with children, veterans, and unaccompanied youth) and persons at risk of homelessness.**

The Wyoming Continuum of Care (CoC), known as the Wyoming Homeless Collaborative (WHC), is a coalition of service providers, state government officials, faith-based community members, Veterans' Administration employees, and others dedicated to addressing homelessness. The WHC focuses on ensuring the success of Wyoming's annual Point in Time Count (P.I.T), coordinating services, and identifying gaps. The CDM attended the 2024 PIT Meeting held virtually. In March 2024, the CDM engaged with the State of Wyoming Housing Program Coordinator to discuss the CoC's coordinated efforts in Cheyenne, the local allocation of Emergency Solutions Grant (ESG) funds and planning the 2025 P.I.T. count. This meeting led the CDM to establish a Cheyenne P.I.T. Count Committee, foster collaboration among local social service agencies, and participate in the P.I.T. Statewide and ESG Scoring Committees in 2024.

**Describe consultation with the Continuum(s) of Care that serves the jurisdiction's area in determining how to allocate ESG funds, develop performance standards for and evaluate outcomes of projects and activities assisted by ESG funds, and develop funding, policies and procedures for the operation and administration of HMIS**

**2. Describe Agencies, groups, organizations and others who participated in the process and describe the jurisdiction's consultations with housing, social service agencies and other entities**

**Table 2 – Agencies, groups, organizations who participated**

1	<b>Agency/Group/Organization</b>	City of Cheyenne
	<b>Agency/Group/Organization Type</b>	Other government - Local
	<b>What section of the Plan was addressed by Consultation?</b>	Lead Agency
	<b>Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?</b>	The city's H&CD Division is the lead agency for preparing the 5-Year Consolidated Plan and Annual Action Plans for the Community Development Block Grant Program. Staff from different city divisions are consulted throughout the year on housing and economic development needs to develop future goals and identify opportunities to layer CDBG funds with existing projects or projects under consideration.
2	<b>Agency/Group/Organization</b>	CHEYENNE HOUSING AUTHORITY
	<b>Agency/Group/Organization Type</b>	PHA
	<b>What section of the Plan was addressed by Consultation?</b>	Public Housing Needs
	<b>Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?</b>	This year, the CDM and the Executive Director of Cheyenne Housing Authority collaborated to assess current waitlist numbers and plan an objective study on the impediments to Fair Housing in Cheyenne, aiming to address specific needs in the city.
3	<b>Agency/Group/Organization</b>	NEEDS, INC.
	<b>Agency/Group/Organization Type</b>	Services-Children Services-Elderly Persons Services-Persons with Disabilities
	<b>What section of the Plan was addressed by Consultation?</b>	Non-Homeless Special Needs

	<b>Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?</b>	The CDM and members of the H&CD Advisory Committee visited Needs Inc. on January 3, 2024. The Executive Director and the staff provided a tour and update on the food bag program for unhoused individuals and the city food box program, which is supported by CDBG funds. After learning about the increase in food requests from residents, the council recommended additional funding for the food pantry program to address the increased need for food.
4	<b>Agency/Group/Organization</b>	HABITAT FOR HUMANITY
	<b>Agency/Group/Organization Type</b>	Housing
	<b>What section of the Plan was addressed by Consultation?</b>	Non-Homeless Special Needs Economic Development
	<b>Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?</b>	The H&CD staff consulted with HFHLC about eligible activities for the General Funds. HFHLC is committed to using funds for acquisition and rehabilitation. The H&CD Council recommended funding a project that will provide a home to the Habitat Family and improve blighted neighborhoods in the city.
5	<b>Agency/Group/Organization</b>	SAFEHOUSE
	<b>Agency/Group/Organization Type</b>	Services - Victims
	<b>What section of the Plan was addressed by Consultation?</b>	Victim Services
	<b>Briefly describe how the Agency/Group/Organization was consulted. What are the anticipated outcomes of the consultation or areas for improved coordination?</b>	The CDM consulted with Safehouse's Executive Director, who expressed concerns about the financial burden that the increase in utility bills for the shelter placed on the organization. The Advisory Council awarded the shelter CDBG Public Service funds for the Safehouse Utility reimbursement application to assist the shelter.

**Identify any Agency Types not consulted and provide rationale for not consulting**

Some agencies were excluded from consultation for the current Annual Action Plan due to the transition from the former program manager to the new manager. Consequently, efforts are underway to lay a strong foundation for expanding engagement initiatives to reach more service providers and stakeholders during the 2024 Program Year. The new CDM has strategically prioritized establishing connections with existing contacts and will broaden the Division’s network by actively engaging in various committees and meetings, such as the Point in Time Count (PIT) Cheyenne, State Committees, and other pertinent meetings, including one-on-one sessions.

**Other local/regional/state/federal planning efforts considered when preparing the Plan**

Name of Plan	Lead Organization	How do the goals of your Strategic Plan overlap with the goals of each plan?
Continuum of Care	Wyoming Homeless Collaborative	The Wyoming Homeless Collaborative (WHC) is an inclusive, community-based group that plans for and manages homeless assistance resources and programs efficiently and effectively to end homelessness in Wyoming. The WHC is the planning body in the State of Wyoming that coordinates the community's policies, strategies, and activities toward ending homelessness. The Continuum of Care (CoC) program is designed to promote community-wide goals to end homelessness, provide funding to quickly rehouse homeless individuals and families while minimizing trauma and dislocation to those persons, promote access to and effective utilization of mainstream programs, and optimize self-sufficiency among individuals and families experiencing homelessness. The program comprises transitional housing, permanent supportive housing for disabled persons, permanent housing, supportive services, and HMIS. The City of Cheyenne Five-Year Con Plan goals align with WHC in providing CDBG funding to support public and general service projects that address the needs of homeless individuals and families in Cheyenne.

**Table 3 – Other local / regional / federal planning efforts**

**Narrative (optional)**

Please see the information provided in previous sections.



## AP-12 Participation – 91.105, 91.200(c)

### 1. Summary of citizen participation process/Efforts made to broaden citizen participation Summarize citizen participation process and how it impacted goal-setting

The H&CD Division has implemented a Citizen Participation Plan (CPP) to ensure public involvement in developing Cheyenne’s CDBG program. The CPP outlines procedures for community approval of the Con Plan and AAP, methods for addressing concerns, objections, and complaints, and amending the plans after approval. It also includes procedures for handling complaints related to CDBG plans, amendments, revisions, and performance reports, ensuring that residents have a timely response to their concerns. A nine-member H&CD Advisory Council oversees the grant process, conducts site visits, and evaluates sub-grantees. Information about the Con Plan and AAP, including the amount of assistance expected and range of eligible activities, is made available through various channels such as public meetings, the city website, the local newspaper, and social media. Localized neighborhood meetings are also held to provide detailed information relevant to specific areas in the city. Efforts are made to ensure that meetings are held at convenient times and locations, with accommodations for persons with disabilities and provisions for non-English speaking residents. The H&CD Division is reevaluating community engagement strategies to increase participation and ensure the community's voice is heard in developing the current AAP and the 2025-2029 Con Plan. Despite historically low public participation in comments on these plans, the city is exploring new ways to increase participation, such as attending community events, local meetings for citizen’s coalitions, and conducting surveys. H&CD staff is actively involved in a city-wide Community Engagement Task Force, which includes representatives from various city departments. This cross-departmental group is committed to enhancing community engagement by leveraging city resources, fostering interdepartmental collaboration, and harnessing technology to systematize community engagement, set city-wide goals, and extend reach to a broader citizen base.

**Amendment:** *The Citizen Participation Table has been updated to include additional entries. Specifically, rows 9 through 11 have been added to the table. These new entries document the citizen participation activities that were conducted to amend the plan to incorporate the Optimist Park Playground Project.*



## Citizen Participation Outreach

Sort Order	Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted and reasons	URL (If applicable)
1	Newspaper Ad	Non-targeted/broad community	Notice of Funding Announcement was published in the Wyoming Tribune Eagle on September 23, 2023.	No verbal or written comments were received.	Nonapplicable.	
3	Newspaper Ad	Non-targeted/broad community	A Public Notice was published in the Wyoming Tribune Eagle on October 25, 2023, announcing a Public Hearing on the Potential Allocation of CDBG Funds for the City of Cheyenne.	No verbal or written comments were received.	Non-applicable	
4	Public Hearing	Non-targeted/broad community	A Public Hearing was held on the potential allocation of CDBG funds on November 1, 2023.	No verbal or written comments were received.	No verbal or written comments were received.	

Sort Order	Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted and reasons	URL (If applicable)
5	Newspaper Ad	Non-targeted/broad community	A Public Notice for a Public Hearing and a 30-day comment period for the AAP was published in the Wyoming Tribune Eagle on March 6, 2024.	No verbal or written comments were received.	No verbal or written comments were received.	
8	Internet Outreach	Non-targeted/broad community	The City of Cheyenne released a Press Release, which was shared by various agencies and partners. The Press Release included a link to an Annual Action Plan Survey, which had ten respondents.	Please see the comments and responses to the Annual Action Plan Survey, which is included as an attachment to the plan.	All comments which required a response were accepted and considered.	

Sort Order	Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted and reasons	URL (If applicable)
9	Newspaper Ad	Non-targeted/broad community	Amended Annual Action Plan: A Public Notice was published in the Wyoming Tribune Eagle on Wednesday, November 20, 2024, for a Public Hearing and a 30-day comment period beginning November 22, 2024, and ending December 23, 2024.	For a comprehensive list of public comments received regarding this amendment, please refer to the attached document: "12-26-24 Affidavit & Public Comments and Notice for the AAP PY24.	All comments were accepted for this amendment.	

Sort Order	Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted and reasons	URL (If applicable)
10	Internet Outreach	Non-targeted/broad community	Amended Annual Action Plan: On 11-22-24, the City of Cheyenne released a Press Release with information about the 30-day Public Comment period. The Press Release included a link to the amended Annual Action Plan on the website and requested public comment.	For a comprehensive list of public comments received regarding this amendment, please refer to the attached document: "12-26-24 Affidavit & Public Comments and Notice for the AAP PY24	All comments were accepted for this amendment.	
11	Internet Outreach	Non-targeted/broad community	Amended Annual Action Plan: Information on the public comment period was posted on Facebook on 11-22-24, and a mass email was distributed to community stakeholders.	For a comprehensive list of public comments received regarding this amendment, please refer to the attached document: "12-26-24 Affidavit & Public Comments and Notice for the AAP PY24	All comments were accepted for this amendment.	

**Table 4 – Citizen Participation Outreach**



## Expected Resources

### AP-15 Expected Resources – 91.220(c)(1,2)

#### Introduction

The City of Cheyenne plans to allocate \$445,293 in PY24 in CDBG funds towards eligible public and general service activities. The projects recommended for funding align with the goals identified in the 2020-2024 Consolidated Plan. Of the anticipated available funds, \$65,000 will be allocated for public service projects and \$380,293 for general service projects. CDBG funds are critical in supporting the needs of low-income individuals and families in Cheyenne by helping them overcome barriers to self-sufficiency.

#### Anticipated Resources

Program	Source of Funds	Uses of Funds	Expected Amount Available Year 1				Expected Amount Available Remainder of ConPlan \$	Narrative Description
			Annual Allocation: \$	Program Income: \$	Prior Year Resources: \$	Total: \$		
CDBG	public - federal	Acquisition Admin and Planning Economic Development Housing Public Improvements Public Services	439,116.00	0.00	94,000.00	533,116.00	533,116.00	The Community Development Block Grant allocation of \$533,116 includes the 2024 HUD allocation of \$439,116 and \$94,000 in grant balances from unspent grant funds. These unspent grant funds will be reused for general service CDBG eligible projects. Unspent grant funds do not include Public Service activities or administrative activities.

Program	Source of Funds	Uses of Funds	Expected Amount Available Year 1				Expected Amount Available Remainder of ConPlan \$	Narrative Description
			Annual Allocation: \$	Program Income: \$	Prior Year Resources: \$	Total: \$		
Other	public - federal	Acquisition Admin and Planning Economic Development Housing Public Improvements Public Services	0.00	0.00	0.00	0.00	0.00	

Table 5 - Expected Resources – Priority Table

**Explain how federal funds will leverage those additional resources (private, state and local funds), including a description of how matching requirements will be satisfied**

To effectively leverage CDBG with additional resources, including private, state, and local funds, all PY24 sub-recipients have committed to providing leveraged dollars for their CDBG-funded projects. This commitment is crucial for extending the reach and impact of the city's CDBG funds. The Housing & Community Development (H&CD) Division does not have matching requirements for CDBG-funded projects. However, the sub-recipient's proactive approach to leveraging additional funds ensures that their CDBG-funded projects are not solely dependent on federal funds.

**Amendment:** *Without the support of Community Development Block Grant funds, the City of Cheyenne will be unable to install a new playground for the low-to-moderate income families in the area, as there are currently no other available funding sources. While the city's general fund does not include allocations for capital improvement projects, the city will provide ongoing park maintenance and equipment upgrades to the Optimist Park Playground after it's completion.*



**If appropriate, describe publically owned land or property located within the jurisdiction that may be used to address the needs identified in the plan**

No publicly owned land or property within Cheyenne will be used to address the Annual Action Plan needs.

**Amendment:** The Optimist Park Playground Project is located at 908 Carey Avenue in Cheyenne, Wyoming. This small neighborhood park, situated on the south side of Cheyenne, lies within a historically low-to-moderate income area. The park is publicly owned and managed by the City of Cheyenne. It currently features an outdated playground that does not meet ADA standards. By improving a public facility on city-owned land and addressing issues in their living environment, the project benefits communities, families, and individuals. In alignment with the Consolidated Plan, the Optimist Park Playground Project satisfies the performance objective of creating a suitable living environment.

**Discussion**

## Annual Goals and Objectives

### AP-20 Annual Goals and Objectives

#### Goals Summary Information

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
2	Provide safe, decent affordable housing	2020	2024	Affordable Housing	City of Cheyenne	Housing Rehabilitation	CDBG: \$88,409.00	Homeowner Housing Rehabilitated: 11 Household Housing Unit
3	Promote self-sufficiency through service provision	2020	2024	Homeless Non-Homeless Special Needs	City of Cheyenne	Supportive Services for Low-income & Special Needs	CDBG: \$65,000.00	Public service activities other than Low/Moderate Income Housing Benefit: 1960 Persons Assisted
6	Program Administration	2020	2024	Program Administration	City of Cheyenne	Program Administration	CDBG: \$87,823.20	Other: 1 Other
7	Preserve and improve low-income neighborhoods	2020	2024	Non-Homeless Special Needs Non-Housing Community Development	City of Cheyenne	Neighborhood Improvements or Infrastructure	CDBG: \$291,884.00	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit: 1120 Persons Assisted

Table 6 – Goals Summary

#### Goal Descriptions

2	<b>Goal Name</b>	Provide safe, decent affordable housing
	<b>Goal Description</b>	<ul style="list-style-type: none"> <li>To provide rehabilitation for 11 low-to-moderate-income city residents.</li> </ul>
3	<b>Goal Name</b>	Promote self-sufficiency through service provision
	<b>Goal Description</b>	<ul style="list-style-type: none"> <li>To provide free legal services to approximately 25 low-income city residents.</li> <li>To provide crisis food assistance for approximately 1,500 low-income city residents</li> <li>To provide emergency assistance to approximately 60 victims of domestic violence.</li> <li>To provide utility assistance to a shelter, benefitting approximately 375 low-income individuals.</li> </ul>
6	<b>Goal Name</b>	Program Administration
	<b>Goal Description</b>	<ul style="list-style-type: none"> <li>To provide program administration for the CDBG 2024 Program Year.</li> </ul>
7	<b>Goal Name</b>	Preserve and improve low-income neighborhoods
	<b>Goal Description</b>	<i>Amendment: The Optimist Park Playground Project will preserve and improve low-income neighborhoods and benefit 1120 low-to-moderate income persons.</i>

## Projects

### AP-35 Projects – 91.220(d)

#### Introduction

The H&CD staff and Advisory Council reviewed the letters of intent and applications for PY24 to ensure that projects receiving CDBG assistance comply with National Objectives and the Con Plan goals. The H&CD Division will present the recommended projects and funding levels to the City Council for review and approval before submitting them to the Department of Housing and Urban Development (HUD) for final review and approval. Under the Public Service Category, projects like the Safehouse Client Emergency Expenses and Utility Assistance programs have been selected due to the increasing demand for such services in Cheyenne. These projects aim to serve hundreds of residents, ensuring they do not exceed 80% of the Area Median Income defined by HUD's LMI limits. Thus, they support the city's goals for homeless prevention and provide supportive services. Similarly, the Needs Inc. Crisis Food Assistance program has been recognized for its critical role in addressing food insecurity among Cheyenne's residents, with an anticipated reach of 1,900 individuals. This project aligns with the city's objectives to enhance public services by offering essential services like food boxes to improve living conditions. The Equal Justice Wyoming Foundation's Civil Legal Services for Low-Income Individuals in Cheyenne is another vital project selected for its potential to address the significant gap in legal aid for those living below 200% of the federal poverty level. This project anticipates serving 25-40 individuals, contributing to the city's goals for homeless prevention and enhancing public services. In the General Service Category, the Habitat for Humanity of Laramie County's Home Rehabilitation for Existing Homeowners and the 2024 Acquisition and Rehabilitation for Future Affordable Housing projects have been chosen due to Cheyenne's critical need for housing. These projects are designed to serve various home rehabilitation clients and align with the Con Plan goal to increase and retain affordable housing units, thereby addressing the local housing crisis and supporting low to moderate-income residents.

Through support of these projects, the city continues to demonstrate its commitment to addressing the diverse needs of its residents. It ensures that all projects funded under the CDBG program contribute to the overarching Con Plan goals of providing safe, stable, affordable housing and services to those in need.

**Amendment:** *The previously mentioned Habitat for Humanity Land Aquisition and Rehabilitation project has been canceled. The funding allocated initially for this project has now been redirected to support the development of the City of Cheyenne Optimist Park Playground Project.*

#### Projects

#	Project Name
1	CANCELED: Land Acquisition and Rehabilitation for Future Habitat Homeowners

#	Project Name
2	2024 Habitat Home Rehabilitation Program for Low-to-Moderate Income Homeowners
3	Civil Legal Services for Low-Income Individuals in Cheyenne
4	Crisis Food Assistance
5	Safehouse Shelter Client Emergency Expenses
6	Safehouse Shelter Utility Assistance
7	Program Administration
8	City of Cheyenne Optimist Park Playground Project

**Table 7 - Project Information**

**Describe the reasons for allocation priorities and any obstacles to addressing underserved needs**

**AP-38 Project Summary**  
**Project Summary Information**

1	<b>Project Name</b>	CANCELED: Land Acquisition and Rehabilitation for Future Habitat Homeowners
	<b>Target Area</b>	City of Cheyenne
	<b>Goals Supported</b>	Provide safe, decent affordable housing
	<b>Needs Addressed</b>	Housing Rehabilitation
	<b>Funding</b>	:
	<b>Description</b>	This project has been cancelled. Rehabilitation and Acquisition. Matrix Code: 14G. National Objective:570.208(a)(3)
	<b>Target Date</b>	9/17/2025
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	One low-to-moderate-income family will benefit from the proposed activity.
	<b>Location Description</b>	The project activity location will be within the City of Cheyenne.
	<b>Planned Activities</b>	<b>This project has been canceled.</b> Habitat for Humanity of Laramie County will use CDBG funds to acquire and rehabilitate a property for a low-to-moderate-income family.
2	<b>Project Name</b>	2024 Habitat Home Rehabilitation Program for Low-to-Moderate Income Homeowners
	<b>Target Area</b>	City of Cheyenne
	<b>Goals Supported</b>	Provide safe, decent affordable housing
	<b>Needs Addressed</b>	Housing Rehabilitation
	<b>Funding</b>	CDBG: \$88,409.00
	<b>Description</b>	Rehabilitation for low-to-moderate-income homeowners. Eligible Activity: 570.202 (a)(1). Matrix Code: 14A, National Objective: 570.208
	<b>Target Date</b>	8/15/2025
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	This project will benefit ten low-to-moderate-income families; most clients are seniors or persons with disabilities.
	<b>Location Description</b>	CITY of CHEYENNE
	<b>Planned Activities</b>	Habitat for Humanity of Laramie County's Home Repair Program will coordinate ten to thirty home rehabilitation repair projects for low-to-moderate-income families in Cheyenne.

3	<b>Project Name</b>	Civil Legal Services for Low-Income Individuals in Cheyenne
	<b>Target Area</b>	City of Cheyenne
	<b>Goals Supported</b>	Promote self-sufficiency through service provision
	<b>Needs Addressed</b>	Supportive Services for Low-income & Special Needs
	<b>Funding</b>	CDBG: \$18,000.00
	<b>Description</b>	Civil legal assistance to LMI individuals. Eligible Activity: Public Service 570.201 (e). Matrix Code: 05C. National Objective: Benefit low- and moderate-income persons.
	<b>Target Date</b>	5/15/2025
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	Approximately twenty-five families will benefit from the proposed activity.
	<b>Location Description</b>	Citywide
	<b>Planned Activities</b>	Equal Justice Wyoming Foundation will provide free legal services to qualifying low-and moderate-income persons in Cheyenne.
4	<b>Project Name</b>	Crisis Food Assistance
	<b>Target Area</b>	City of Cheyenne
	<b>Goals Supported</b>	Promote self-sufficiency through service provision
	<b>Needs Addressed</b>	Supportive Services for Low-income & Special Needs
	<b>Funding</b>	CDBG: \$20,000.00
	<b>Description</b>	Crisis Food Assistance. Eligible Activity: Public Service 570.201 (e). Matrix Code: 05W (Food Banks). National Objective: Benefit low- and moderate-income areas.
	<b>Target Date</b>	5/15/2025
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	Needs estimates that 1,500 unduplicated individuals and approximately 500 families will benefit from crisis food assistance.
	<b>Location Description</b>	Citywide
	<b>Planned Activities</b>	Needs Inc. will provide food supplies for eligible City of Cheyenne residents.
5	<b>Project Name</b>	Safehouse Shelter Client Emergency Expenses



	<b>Target Area</b>	City of Cheyenne
	<b>Goals Supported</b>	Promote self-sufficiency through service provision
	<b>Needs Addressed</b>	Supportive Services for Low-income & Special Needs
	<b>Funding</b>	CDBG: \$10,000.00
	<b>Description</b>	Safehouse Victim's Emergency Fund. Eligible Activity: Public Service 570.201 (e). Matrix Code: 03T. National Objective: Benefits low- and moderate-income (LMI) Limited Clientele.
	<b>Target Date</b>	5/15/2025
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	Safehouse estimates that 60 unduplicated individuals will benefit from the Victim's Fund.
	<b>Location Description</b>	Citywide
	<b>Planned Activities</b>	Safehouse Services will provide client-specific funding that will assist victims in successfully leaving abusive relationships. Eligible expenses include utilized rent, security deposits, and emergency medical expenses, such as replacement of eyeglasses and prescriptions.
6	<b>Project Name</b>	Safehouse Shelter Utility Assistance
	<b>Target Area</b>	City of Cheyenne
	<b>Goals Supported</b>	Promote self-sufficiency through service provision
	<b>Needs Addressed</b>	Supportive Services for Low-income & Special Needs
	<b>Funding</b>	CDBG: \$17,000.00
	<b>Description</b>	Utility Assistance. Eligible Activity: Public Service 570.201 (e). Matrix Code: 03T. National Objective: Benefits low- and moderate-income (LMI) people-Limited Clientele.
	<b>Target Date</b>	5/15/2025
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	Safehouse estimates that 375 unduplicated individuals will benefit from utility assistance.
	<b>Location Description</b>	Cheyenne, WY 82007

	<b>Planned Activities</b>	Safehouse Services will leverage CDBG funding to offset the escalating costs of utilities within the shelter. The utility assistance will directly support individuals residing in the shelter by ensuring a secure and comfortable living environment throughout their stay.
<b>7</b>	<b>Project Name</b>	Program Administration
	<b>Target Area</b>	City of Cheyenne
	<b>Goals Supported</b>	Program Administration
	<b>Needs Addressed</b>	Program Administration
	<b>Funding</b>	CDBG: \$87,823.00
	<b>Description</b>	Planning and Administration. 570.206
	<b>Target Date</b>	5/15/2025
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	It is estimated that approximately 681 families will benefit from the administration management, coordination, and evaluation of the city's CDBG program.
	<b>Location Description</b>	Citywide
	<b>Planned Activities</b>	Administer the Administrative costs for the overall management, coordination, and evaluation of the city's CDBG program.
<b>8</b>	<b>Project Name</b>	City of Cheyenne Optimist Park Playground Project
	<b>Target Area</b>	City of Cheyenne
	<b>Goals Supported</b>	Preserve and improve low-income neighborhoods
	<b>Needs Addressed</b>	Neighborhood Improvements or Infrastructure
	<b>Funding</b>	CDBG: \$291,884.00
	<b>Description</b>	Add a new ADA-compliant playground to Optimist Park, a low-to-moderate-income park located in Census Tract 2, Block Group 2 in Cheyenne.
	<b>Target Date</b>	5/30/2025
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	Approximately 1120 low-to-moderate income residents will benefit from this neighborhood improvement project.

	<b>Location Description</b>	<p>The Optimist Park Playground Project is located at 908 Carey Avenue in Cheyenne, Wyoming. This small neighborhood park, situated on the south side of Cheyenne, lies within a historically low-to-moderate income area. <i>This project will significantly benefit the residents of Census Tract 000200 (Tract 2), Block Group 2, where 62% of the population is classified as Low-to-Moderate Income (LMI)[1]. The area benefit activity aligns perfectly with CDBG requirements, as the neighborhood is predominantly residential and exceeds the 51% LMI threshold</i></p>
	<b>Planned Activities</b>	<p>The City of Cheyenne's Community Recreation and Events Department will utilize \$291,884 in CDBG funding for a crucial playground revitalization project at Optimist Park, 908 Carey Ave, Cheyenne, Wyoming, 82007. This initiative aligns with our ongoing mission to replace outdated, non-ADA-compliant, and unsafe playgrounds throughout the city's park system.</p> <p>The Optimist Park playground, installed in 2005, has exceeded its useful life expectancy. Replacement parts are increasingly difficult to obtain and expensive, making maintenance challenging. Our proposal aims to:</p> <ol style="list-style-type: none"> <li>1. Replace the old playground structure with modern, safe equipment</li> <li>2. Install ADA-compliant safety surfacing</li> <li>3. Improve ADA access with new concrete pathways</li> <li>4. Enhance the overall playground area utilization</li> </ol>

## AP-50 Geographic Distribution – 91.220(f)

### Description of the geographic areas of the entitlement (including areas of low-income and minority concentration) where assistance will be directed

Allocating PY24 CDBG funds to a specific geography is impractical, as the recipients of the funded projects are currently unknown. The Public Service projects receiving funds serve low and moderate-income Cheyenne residents. Rehabilitation projects are in different census tracts, and Habitat for Humanity has not identified a specific geographic area to target for the two projects for which they are receiving General Service funds to complete. While the city is currently not allocating CDBG funding to specific geographies, we are working with the city's GIS Department to develop maps using CDBG Activity by Tract data and city infrastructure project data to identify LMI areas that have not benefited from CDBG funds and plans to target these areas for future projects.

**Amendment:** The City of Cheyenne, while not allocating PY24 CDBG funds to a specific geography, has demonstrated its commitment to enhancing low- to moderate-income neighborhoods through safety, accessibility, and infrastructure improvements. Currently, the City is installing sidewalks and ADA ramps in Lincoln Park, a small neighborhood park in South Cheyenne. This project and the Optimist Playground Project exemplify the City's dedication to serving low- to moderate-income residents. In 2023, the Housing & Community Development staff engaged with community advocates who emphasized the need for neighborhood improvements, particularly on sidewalks and parks in South Cheyenne's LMI areas. This valuable citizen input significantly influenced the City's decision-making process and the Housing & Community Development Advisory Council when reallocating returned funds. We believe the Optimist Park Playground project represents the optimal use of CDBG funds and demonstrates our commitment to responsively addressing citizen concerns.

### Geographic Distribution

Target Area	Percentage of Funds
City of Cheyenne	100

Table 8 - Geographic Distribution

### Rationale for the priorities for allocating investments geographically

The City of Cheyenne is not targeting a specific geographic area for project funding in Program Year 2024.

### Discussion

CDBG PY24 funding will not be allocated to a specific geography as the recipients of rehabilitation and

acquisition and home rehabilitation project locations are currently unknown. Rehabilitation projects will be in different census tracts, which are currently unknown. No specific geographic area has been identified for acquiring and rehabilitating a blighted property for an LMI family. The public service projects receiving funds serve low and moderate-income Cheyenne residents throughout the city. While there is no PY24 funding allocated to specific geographies, the H&CD Division is currently working with the city of Cheyenne's GIS Department to develop maps using CDBG Activity by Tract data and city infrastructure project data to identify LMI areas that have not benefited from CDBG funds and plans to target these areas for future projects.

## Affordable Housing

### AP-55 Affordable Housing – 91.220(g)

#### Introduction

The Greater Cheyenne Chamber of Commerce’s 2023 Housing Study estimates a projected shortfall of 1,150-1,250 housing units in the city and Laramie County by 2028. According to the report, the city and county are expected to experience considerable population growth, with projections indicating an addition of 2,215 households from 2023 to 2028. This growth is partly fueled by the Sentinel Project at F.E. Warren Air Base, which is expected to bring 1,452 people, or approximately 1,014 new households, to the area. The shortfall estimate may be inaccurate, as the report does not include the loss of aging and blighted housing stock, which will need to be replaced or rehabilitated. The Chamber report’s projections don’t consider the lack of senior-friendly, accessible housing units needed to address the expected growth of the senior population highlighted in the recent Wyoming Community Development Association Housing State Housing Needs Assessment.

In response to the projected shortage of affordable housing stock, the City of Cheyenne is working to address the issue by focusing on Unified Development Code modifications to facilitate affordable housing development. In 2023, the city approved 72 single-family and 28 multifamily home permits, adding 184 dwelling units to Cheyenne’s housing stock. The H&CD Division is using its limited CDBG funds to support critical objectives outlined in the 2020-2024 Consolidated Plan that will address the housing shortage by preserving and enhancing low-income neighborhoods and ensuring the provision of safe, decent, and affordable housing. Habitat for Humanity of Laramie County’s Habitat’s Home Repair Program will coordinate eleven rehabilitation projects, the city will achieve the Consolidated Plan Goal Outcome Indicator of supporting 35 clients with home rehabilitation. The estimated number of households supported through rental assistance (6) reflects the number of clients to Safehouse Shelter Services, which will provide CDBG-funded down-payment assistance through the Safehouse Victim’s Assistance Fund.

One Year Goals for the Number of Households to be Supported	
Homeless	6
Non-Homeless	11
Special-Needs	0
Total	17

Table 9 - One Year Goals for Affordable Housing by Support Requirement

One Year Goals for the Number of Households Supported Through	
Rental Assistance	6

Annual Action Plan  
2024

One Year Goals for the Number of Households Supported Through	
The Production of New Units	0
Rehab of Existing Units	11
Acquisition of Existing Units	0
Total	17

**Table 10 - One Year Goals for Affordable Housing by Support Type**

## Discussion

Habitat for Humanity of Laramie County estimates that the Habitat Home Repairs Program will coordinate eleven rehabilitation projects with CDBG funds in the next grant cycle. The eleven anticipated home rehabilitation projects for LMI homeowners involve rehabbing existing units. The estimated number of households supported through rental assistance (6) reflects the number of clients to Safehouse Shelter Services, which will provide CDBG-funded down-payment assistance through the Safehouse Victim's Assistance Fund.

## **AP-60 Public Housing – 91.220(h)**

### **Introduction**

Established in 1971, the Cheyenne Housing Authority (CHA) has played a crucial role in addressing the need for low-income housing in Cheyenne. By April 2001, CHA significantly expanded its responsibilities, becoming Contract Administrator for housing projects across Wyoming. CHA's mission is to provide decent, safe, and sanitary housing to elderly, disabled, and poor families who cannot secure housing through conventional means. CHA serves as the public housing authority for both Cheyenne and Laramie, managing 341 public housing units. This includes 266 units in Cheyenne, which are made up of 97 scattered-site single-family homes and three multifamily properties catering to senior and disabled tenants, as well as 75 units in Laramie. Additionally, CHA administers the Housing Choice Voucher Program, providing 1,786 vouchers across several Wyoming cities, and manages 153 Veterans Assistance Supportive Housing vouchers in Cheyenne, Sheridan, and Gillette to address veteran homelessness. Through the Project-Based Section 8 Contract Administration (PBCA) program on behalf of HUD, CHA performs statewide contract administration services for 51 properties, encompassing 2,165 rental units.

CHA also owns and operates three WRAP houses and has launched the Welcome Home Wyoming program, which has provided down payment assistance to over 625 new homeowners. Furthermore, CHA owns and operates market-rate rental units, including 32 townhomes serving the elderly in Foxcrest II, seven single-family homes in Cheyenne, and 12 Weaver Road Apartments. In addition to its housing initiatives, CHA has sponsored the formation of the Wyoming Housing Partnership, a new nonprofit organization with an ownership interest in 88 units in Cheyenne and 20 in Powell, with CHA managing the Cheyenne units on behalf of the partnership. CHA also provides various services through the Laramie County Senior Center, including a multi-site nutrition program, senior social services, health enhancement services, and family caregiver/respite care. These comprehensive efforts highlight CHA's dedication to improving the quality of life for Wyoming's residents through a broad spectrum of housing initiatives and services.

### **Actions planned during the next year to address the needs to public housing**

The Cheyenne Public Housing Authority (CHA) has outlined a series of actions in its 2024 Annual PHA Plan to ensure that CHA can provide safe, secure, and healthy housing options for low-income residents. CHA's most recent HUD-approved 5-Year Action Plan was approved on March 30, 2023. The Annual Action Plan goals align with those included in the 5-Year Plan.

- **Conversion of Public Housing:** CHA plans to convert Public Housing to Project-Based Rental Assistance or Project-based Vouchers under the Rental Assistance Demonstration (RAD) program.
- **Capital Fund Utilization:** CHA will continue to maximize the use of Capital Funds. The 5-Year Action Plan is updated annually to align Capital Fund plans and expenditures with property and resident-identified needs. This includes emergent capital needs and long-term cost savings



strategies, such as replacing carpets with luxury vinyl plank flooring and modernizing units by replacing aluminum wire with copper wire in single-family homes.

- Repositioning Single-Family Housing: CHA will consider options to reposition the single-family portion of its Public Housing portfolio.
- Resident Initiative Enhancement: CHA aims to enhance Resident Initiative efforts, staff participation, and the implementation of feasible Council recommendations.
- Security Concerns: Capital Funds will be used to address security concerns of Residents, as warranted.
- Procedural and Plan Updates: CHA plans to update several procedures and plans, including the Housing Choice Voucher Program Administrative and the Agency Disaster Recovery Plans.

Public Housing Repositioning Plan: CHA will research and evaluate a Public Housing repositioning plan. A priority identified is the replacement of scattered-site single-family homes, and a repositioning plan will be evaluated in 2024 after CHA's new agency-wide operating software implementation.

### **Actions to encourage public housing residents to become more involved in management and participate in homeownership**

The Cheyenne Housing Authority (CHA) has implemented several initiatives to encourage public housing residents to become more involved in management and participate in homeownership. These actions include:

- Resident Advisory Council (RAC): CHA encourages residents to participate in a Resident Advisory Council (RAC) at each of CHA's multifamily rental properties. The RAC serves as a platform for soliciting and discussing tenant feedback regarding the public housing program's operations.
- Family Self-Sufficiency (FSS) Program: Available to Housing Choice Voucher and Public Housing program participants, the FSS Program supports participants' efforts to become financially independent. This includes learning how to improve financial situations, gaining new or enhancing existing employment skills, and being informed about household budgeting and other methods to achieve economic self-sufficiency.
- Ongoing Training: CHA provides ongoing Fair Housing training for all staff and offers tenants training on housekeeping, being a good neighbor, energy conservation, and other topics to support successful tenancy.

These initiatives are designed to engage residents in managing their living environments and encourage a sense of community and self-reliance. Residents have a voice in managing their properties through participation in the RAC. At the same time, the FSS Program and other training opportunities equip them with the skills needed to move toward economic independence and homeownership.

### **If the PHA is designated as troubled, describe the manner in which financial assistance will be provided or other assistance**

Non-applicable. CHA is designated a Standard PHA.

## **Discussion**

The Cheyenne Housing Authority (CHA) is a critical agency that meets the housing needs of low- to moderate-income (LMI) residents in Cheyenne and throughout Wyoming. CHA oversees 341 public housing units, manages 786 Housing Choice Vouchers, and facilitates homeownership through the Welcome Home Wyoming program. These efforts are instrumental in aiding the elderly, disabled, and families facing economic challenges, enhancing their living conditions with secure and healthful housing solutions. CHA's commitment to improving affordable housing is evident in its initiatives, such as the transition of public housing to Project-Based Rental Assistance and the strategic utilization of Capital Funds for property enhancements. Additionally, CHA encourages community engagement and self-sufficiency among its residents through the Resident Advisory Council and the Family Self-Sufficiency Program.

This year, the Housing & Community Development Division plans to collaborate with CHA to identify independent agencies to conduct an Impediments to Fair Housing Assessment for the City of Cheyenne. The assessment aims to identify specific barriers affecting LMI residents' access to fair housing and propose improvement recommendations. The findings will be instrumental in shaping strategies for the city's 2025-2029 Community Development Block Grant (CDBG) Consolidated Plan.

## **AP-65 Homeless and Other Special Needs Activities – 91.220(i)**

### **Introduction**

The city's Con Plan goals identify allocating funds to assist those experiencing homelessness and special populations as a priority need. The H&CD Division works with various agencies that provide services directly to or support agencies that address the needs of homeless and special populations in Cheyenne. These agencies include COMEA homeless shelter; Safehouse domestic violence shelter; Family Promise, a family shelter; Unaccompanied Students Initiative, a homeless youth shelter; Community Action of Laramie County (CALC) Interfaith Family Support Services, a local transitional housing agency and a local ESG and CSBG agency; Wyoming Independent Living, a local disability agency; Laramie County Community Partnership Housing Action Team, a group of local nonprofit and community partners working on housing needs in the community; and Needs, Inc., a local food bank.

### **Describe the jurisdictions one-year goals and actions for reducing and ending homelessness including**

#### **Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs**

The H&CD Community Development Manager (CDM) attends the WY CoC quarterly and WCH meetings and plans to serve on the local 2025 PIT Count committees. The CDM will have one-on-one meetings with service providers to identify potential projects and help coordinate efforts to reach out to unsheltered persons and assess their needs. In addition to consulting regularly with CDBG sub-recipients Safehouse, Needs Inc., and COMEA Shelter, the CDM will consult with the staff and administrators of the Welcome Mat, Community Action of Laramie County, Inc., Healthworks, Veterans Rock, the Wyoming Independent Citizen's Coalition, Unaccompanied Students Initiative, Just Caring volunteers and Family Promise of Cheyenne to learn about and support local efforts to reach out to individuals experiencing homelessness and offer assistance and support when possible.

#### **Addressing the emergency shelter and transitional housing needs of homeless persons**

The CDM will support local efforts to address homeless shelter and transitional housing needs by working with local agencies and care providers to determine funding gaps for services and facility needs. If the identified needs are considered eligible activities and meet HUD's National Objectives, the CDM will provide technical support and information to agencies seeking future CDBG public and general service funding.

**Helping homeless persons (especially chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth) make the transition to permanent housing and independent living, including shortening the period of time that individuals and families experience homelessness, facilitating access for homeless individuals and families to affordable housing units, and preventing individuals and families who were recently homeless from becoming homeless again**

In PY24, the city will allocate \$65,000 in CDBG funds to public service projects supporting agencies that help prevent low-income individuals and families from transitioning to affordable housing and avoid becoming chronically homeless.

**Helping low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families and those who are: being discharged from publicly funded institutions and systems of care (such as health care facilities, mental health facilities, foster care and other youth facilities, and corrections programs and institutions); or, receiving assistance from public or private agencies that address housing, health, social services, employment, education, or youth needs.**

To better understand the challenges facing low-income individuals recently discharged from institutions or systems of care, the CDM met with a HealthWorks Program Coordinator to discuss the housing issues reported by HealthWorks's clients. Healthworks provides affordable healthcare on a sliding scale fee to income-eligible patients. In July 2024, the CDM will meet with the Director and Deputy Director of HealthWorks to discuss their priority needs.

The H&CD staff plans to review reports from health, mental health, and foster care facilities and corrections programs in Laramie County to develop an understanding of the initiatives underway to prevent homeless individuals and families from becoming homeless. On May 17, 2024, the CDM, the Mayor, the Chief of Staff, and the Economic Resource Administrator recently met the Director of Community Health Analysis to discuss the capacity issues facing the agencies working with unhoused individuals and families. The actions determined in the meeting included facilitating an agency meeting to identify barriers to addressing homelessness and developing strategies to include in a plan better to address the city's growing needs for unhoused services.

## **Discussion**

The 2024 PIT Count for Wyoming was recently released and confirms concerning growth trends in the

Wyoming unhoused population. Specifically, the PIT Snapshot shows that 501 people participated in the count; of those, 412 were sheltered persons, and 89 were Unsheltered Persons. Of the 501 participants, 52% reported staying in Emergency Shelters, 31% were in Transitional Housing, and 18% were Unsheltered. The Unsheltered count includes individuals staying on the streets, in encampments, in their cars, or in other places not intended as housing. From 2023 to 2024, Wyoming saw an increase in the number of unsheltered homeless people by 53%. In 2023, 58 participants reported being unsheltered; in 2024, 89 reported being unsheltered.

Wyoming also saw a sharp increase of 53% in family homelessness from 2023 to 2024. In 2023, 6% of the PIT participants reported as “Adults & Children”; in 2024, 20% reported as “Adults & Children”. While Wyoming saw a significant decline in Veteran Homelessness, Unaccompanied Youth homelessness increased by 11%, and chronic homelessness increased by 75%. According to PIT data, 31% of Wyoming’s homeless population suffers from mental health disorders.

While the PIT provides useful information about the homeless population in Wyoming, the data does not explicitly represent the annual homeless population in Cheyenne, as the numbers or demographic breakdown differ seasonally. More specific information is needed to understand better the specific needs of the homeless populations in Cheyenne. Through participation in CoC meetings and committees and one-on-one conversations, the H&CD Division will develop a more comprehensive understanding of how future CDBG projects can address the range of needs of homeless individuals and families in Cheyenne.

The City of Cheyenne recognizes our community's growing need for unhoused services. *Homelessness Prevention* and *Services Benefiting Unhoused Populations* will be included as High-Priority needs in the city’s upcoming Con Plan, and efforts to coordinate resources will be strengthened to better address this need.

## **AP-75 Barriers to affordable housing – 91.220(j)**

### **Introduction:**

Recent data included in the Wyoming Community Development Authority's Statewide Housing Needs Assessment has provided crucial information on the local and regional barriers to affordable housing. This information will assist the city in coordinating with local agencies to develop strategies that determine how to more effectively manage local resources to address Cheyenne's Barriers to affordable housing. The UDC code changes, increased public engagement efforts, and investment infrastructure that allow for affordable housing development demonstrate the city's ongoing commitment to coordinating and removing barriers to underserved residents in Cheyenne.

### **Actions it planned to remove or ameliorate the negative effects of public policies that serve as barriers to affordable housing such as land use controls, tax policies affecting land, zoning ordinances, building codes, fees and charges, growth limitations, and policies affecting the return on residential investment**

The City of Cheyenne has taken actions to remove the negative effects of public policies that serve as barriers to affordable housing by changing zoning codes with a particular focus on those that impact affordable housing development. In 2023, significant changes were made to the Unified Development Code (UDC) to stimulate housing development, including removing minimum lot areas, allowing for the construction of homes on smaller lots, potentially reducing costs, and increasing the number of houses that can be built. Additionally, the city eliminated density requirements for multifamily lots, enabling developers to build more units on a single lot, and reduced parking requirements for multifamily developments, which is expected to encourage the construction of more studio and one-bedroom apartments. In 2024, the city further adapted its regulations by removing the requirement for brick as a material in income-restricted housing, aiming to lower construction costs and promote affordable housing development.

The city has also received \$1.8 million from the Wyoming State Land and Investment Board to provide water and sewer infrastructure for a Habitat for Humanity housing multifamily development, highlighting the city's commitment to supporting non-profits in their efforts to develop affordable housing. The city continues to explore additional code changes that could further facilitate the development of various housing types, including single-family units, townhomes, and duplexes. Through these regulatory changes, enhanced community engagement, strategic studies, and financial infrastructure support, Cheyenne is working diligently to overcome obstacles to affordable housing and meet the needs of its underserved residents.

### **Discussion:**

The Wyoming Community Development Authority's recently released Statewide Housing Needs

Assessment provides valuable insights into state-wide housing-specific barriers and specific barriers for regions and counties. [1] According to the assessment, the barriers for Southeast Region and Laramie County include:

- Development of age-friendly housing to prepare for the growth of the population aged 85 and over.
- Addressing NIMBYism and providing information on the positive impacts that affordable housing projects have on their neighborhoods
- Addressing Workforce Cost burden issues, particularly for the Arts, Recreation, and Food Service Industries workforce.
- Address the affordability gap that disproportionately impacts LMI persons.
- Creation of Affordable Housing Stock
- Remove regulatory barriers, such as lot size and parking space minimums, height restrictions, and material requirements.
- Provide affordable alternative housing options, such as modular or mobile homes.

[1] The Wyoming Community Development Authority Statewide Housing Needs Assessment

## **AP-85 Other Actions – 91.220(k)**

### **Introduction:**

In PY24, the H&CD Division is focused on improving existing programs and identifying new funding sources to meet better the needs of those seeking affordable housing and related services. A statewide housing needs assessment has highlighted significant housing challenges within Laramie County, and Cheyenne. According to the Wyoming Community Development Authority (WCDA), an additional 1,204 to 1,994 rental units and 3,181 to 5,271 housing units will be required by 2030 to support the area's growing population and economic development. In response, the city has outlined strategies to overcome obstacles facing underserved communities, eliminate barriers to affordable housing, alleviate poverty, address public safety concerns, and improve collaboration between public and private housing and social service agencies.

### **Actions planned to address obstacles to meeting underserved needs**

The City of Cheyenne is taking significant steps to address obstacles to meeting underserved needs through several innovative programs and partnerships. One key initiative the city has supported is the LEAD Laramie County pre-arrest law enforcement diversion program, which aims to redirect low-level, non-violent drug offenders to community-based social services instead of the criminal justice system. Based on harm reduction principles, this program involves collaboration between various local agencies and seeks to improve outreach, service coordination, and treatment referrals for eligible individuals. Additionally, Cheyenne has implemented a co-responder program that pairs law enforcement officers with mental health professionals to address behavioral health and substance use calls more effectively. The city has also made a substantial financial commitment to the United Way of Laramie County, allocating \$250,000 annually for three years. Furthermore, Cheyenne has invested significant General Funds to support essential public health programs, including services for seniors, youth, and vulnerable populations. These efforts show Cheyenne's commitment to addressing the needs of its underserved communities through innovative approaches and strategic resource allocation.

### **Actions planned to foster and maintain affordable housing**

In 2023, significant changes were made to the city's Unified Development Code (UDC) to stimulate



housing development. These changes included removing minimum lot areas, allowing for the construction of homes on smaller lots, potentially reducing costs, and increasing the number of houses that can be built. Additionally, the city eliminated density requirements for multifamily lots, enabling developers to build more units on a single lot, and reduced parking requirements for multifamily developments, which is expected to encourage the construction of more studio and one-bedroom apartments. In 2024, the city further adapted its regulations by removing the requirement for brick as a material in income-restricted housing, aiming to lower construction costs and promote affordable housing development.

The city's Community Development Manager (CDM) actively promotes collaboration among city departments, non-profits, and agencies to enhance coordination and support for housing projects. The Community Engagement Task Force is developing toolkits and resources to improve outreach and participation in the Community Development Block Grant (CDBG) planning process. Furthermore, in collaboration with the city, the Cheyenne Housing Authority is seeking an independent agency to conduct a comprehensive study on barriers to affordable housing in Cheyenne. This study aims to identify and propose actionable steps to remove these barriers.

The City of Cheyenne has also received \$1.8 million from the Wyoming State Land and Investment Board to provide water and sewer infrastructure for a Habitat for Humanity multi-family housing development, highlighting the city's commitment to supporting non-profits in their efforts to develop affordable housing units. The city continues to explore additional code changes that could further facilitate the development of various housing types, including single-family units, townhomes, and duplexes. Through these regulatory changes, enhanced community engagement, strategic studies, and financial infrastructure support, Cheyenne is working diligently to foster and maintain affordable housing in Cheyenne.

### **Actions planned to reduce lead-based paint hazards**

In March 2024, the Community Development Manager for the city's Housing & Community Development Division met with the Program Coordinator and Assistant Program Coordinator of Habitat for Humanity of Laramie County to strategize on reducing lead-based hazards in the community. The focus was for the city to use Community Development Block Grant (CDBG) funds to cover the costs for a Habitat employee to receive certification in lead Paint testing.

Habitat for Humanity of Laramie County already has a lead testing machine funded by the city. Still, the departure of the lead-paint-testing certified Construction Manager left a gap in their capabilities. The objective for 2024 is to certify a new team member in lead paint testing. This move will significantly benefit Cheyenne's low-to-moderate income (LMI) residents, as Habitat for Humanity runs a proactive housing rehabilitation program.

Cheyenne's housing landscape includes over 18,000 units built before 1980, many suspected to contain lead-based paint. These older homes are predominantly situated in neighborhoods with high LMI

families. The Housing and Community Development (H&CD) Division mandates lead paint testing for all pre-1978 homes undergoing rehabilitation that involves disturbing painted surfaces. When lead paint is detected, its safe removal or stabilization is included in the rehabilitation project's scope of work to ensure resident safety.

To further support this initiative, lead paint informational booklets in English and Spanish are distributed to all sub-grantees executing rehabilitation work, ensuring they are well informed about lead-based paint's hazards and remediation procedures.

### **Actions planned to reduce the number of poverty-level families**

The H&CD Division is collaborating with the Cheyenne Housing Authority to investigate the barriers to affordable housing and identify actionable solutions. The Division works closely with various city departments. It continues to forge partnerships with non-profit organizations, community members, social service agencies, and businesses to effectively address the community's homelessness issues. Additionally, the H&CD Division's involvement in the Wyoming Homeless Collaborative will strengthen the Continuum of Care across Wyoming.

### **Actions planned to develop institutional structure**

The City of Cheyenne's Housing & Community Development (H&CD) Office is enhancing its institutional structure through strategic collaborations with city departments and external organizations, focusing on efficiently administering Community Development Block Grant (CDBG) funds. By partnering with the Finance, Purchasing, IT, and HR Departments, the office ensures responsible financial management and project execution. Additionally, partnerships with non-profits and community groups, the Laramie County Community Partnership, Inc., and the Wyoming Homeless Collaborative aim to address diverse community needs, prevent service duplication, and promote innovative strategies for community development. This integrated approach facilitates a comprehensive, efficient, and effective response to the challenges facing Cheyenne, aligning with the national objectives of the CDBG program.

### **Actions planned to enhance coordination between public and private housing and social service agencies**

The City of Cheyenne is actively collaborating with a range of public and private organizations, including the Cheyenne Housing Authority, COMEA Inc., Family Promise, and LCCP partners, to meet the needs of individuals and families with low to moderate incomes, special needs, and those experiencing

homelessness. To further enhance coordination and support for housing initiatives, the city's Community Development Manager serves on the City of Cheyenne Community Engagement Task Force. This Task Force creates toolkits and resources to bolster outreach and encourage citizen participation.

**Discussion:**

Please see the information provided in previous sections.

## Program Specific Requirements

### AP-90 Program Specific Requirements – 91.220(I)(1,2,4)

#### Introduction:

There is currently no program income available for use for projects planned for the 2024 Program Year.

#### Community Development Block Grant Program (CDBG)

##### Reference 24 CFR 91.220(I)(1)

Projects planned with all CDBG funds expected to be available during the year are identified in the Projects Table. The following identifies program income that is available for use that is included in projects to be carried out.

1. The total amount of program income that will have been received before the start of the next program year and that has not yet been reprogrammed	0
2. The amount of proceeds from section 108 loan guarantees that will be used during the year to address the priority needs and specific objectives identified in the grantee's strategic plan.	0
3. The amount of surplus funds from urban renewal settlements	0
4. The amount of any grant funds returned to the line of credit for which the planned use has not been included in a prior statement or plan	0
5. The amount of income from float-funded activities	0
<b>Total Program Income:</b>	<b>0</b>

#### Other CDBG Requirements

1. The amount of urgent need activities	0
2. The estimated percentage of CDBG funds that will be used for activities that benefit persons of low and moderate income. Overall Benefit - A consecutive period of one, two or three years may be used to determine that a minimum overall benefit of 70% of CDBG funds is used to benefit persons of low and moderate income. Specify the years covered that include this Annual Action Plan.	100.00%

Please see the information provided in previous sections.

## Attachments



Attachment: Affidavit, Public  
Comments and Public Notices  
and Outreach for the  
Amendment to the  
Program Year 2024  
Annual Action Plan

From:  
Wyoming Tribune Eagle  
702 W. Lincolnway  
Cheyenne, WY 82001

Affidavit of Publication

Description of advertisement:

AAI'24

Published: 11/20/24

AI# 582277

THE STATE OF WYOMING ) ss.  
County of Laramie )

I, Clarence McDonald, do  
solemnly swear that I am the Publisher's Agent  
of the **Wyoming Tribune Eagle**, a newspaper of  
general circulation published in the County of  
Laramie, State of Wyoming; that the notice, of  
which the attached is a true copy, was published in  
said newspaper for 1 publications, the first having  
been made on 11/20/2024, and the last publication  
having been made on 11/21/2024; that said notice  
was published in the regular and entire issue of said  
newspaper during the period and times of publica-  
tion aforesaid and that the notice was published in  
the newspaper proper, and not in a supplement.

Publication fees: \$116.67

Subscribed and sworn to before me  
on this date: November 20, 2024



[Signature]  
Notary Public

City of Cheyenne Housing  
& Community Development  
Division

Announcing 30-day Public  
Comment Period for a  
Substantial Amendment to the  
Annual Action Plan for  
Program Year 2024 (PY24)

**SUBSTANTIAL AMENDMENT  
OVERVIEW:**

The Housing & Community Development Division proposes to amend Cheyenne's PY24 Action Plan for the Community Development Block Grant Program, funded by the U.S. Department of Housing and Urban Development (HUD). The City will hold a 30-day public comment period for citizen input on proposed changes. The amendment proposes reallocating \$291,884 in returned funds to the Community Recreation & Events Department for a new ADA-compliant playground in Optimist Park at 900 Carey Ave. This project benefits a low-to-moderate income area, meeting HUD's national objectives, eligible activity requirements, and the 2020-2024 Consolidated Plan goal to improve public facilities.

**PUBLIC COMMENT PERIOD**

The City of Cheyenne invites public comments on a proposed amendment from November 22 to December 23, 2024. The amended plan will be available on the city's website (Housing & Community Development Division - City of Cheyenne ([cheyennecity.org](http://cheyennecity.org))) and in hard copy at the Housing & Community Development Division, Mayor's Office, City Clerk's Office (2101 O'Neil Avenue), and Laramie County Library (2200 Pioneer Avenue). Residents are encouraged to review and provide feedback during this 30-day period.

Email comments will be accepted from November 22 to December 23, 2024, at 5:00 PM. Please send comments or questions to Amy Gorbey, Community Development Manager, at: [agorbey@cheyennecity.org](mailto:agorbey@cheyennecity.org). Comments will not be accepted by telephone.

The City of Cheyenne will provide reasonable accommodations for persons with disabilities to access city services, programs, activities, and special communication arrangements. All venues for participation are fully accessible. For accommodation requests, please contact the Office of Human Resources at 307-637-6340. November 20, 2024  
MO: 582277



## Summary of Public Comments on the Optimist Park Project

The proposed Optimist Park project, as part of the Amendment to the City of Cheyenne's Annual Action Plan for Program Year 2024, has garnered significant public support. Eight citizens emailed comments, with one representing a couple. Several comments came from the Wyoming Independent Citizen's Coalition (WICC) members. A letter of support was also sent to the Housing & Community Development Division from WICC. Seven of these comments expressed positive sentiments. At the same time, one email was an inquiry rather than a comment.

### Detailed Comments

1. On November 20, 2024, at 6:23 PM, a citizen expressed:

"I support funding for the Optimist Park playground!"

2. On November 22, 2024, at 11:35 AM, the director of WY211 requested more information about the reallocation of funds for the Optimist Park project.

3. On November 22, 2024, at 2:18 PM, the Director of the Laramie County Community Partnership stated:

"I love this reallocation of funds to support a playground in Optimist Park. I think this aligns well with the goal of the needs assessment of the Laramie County Community Partnership and Cheyenne Regional Medical Center to improve the neighborhood and physical environment. It focuses on the historic south side, an area of identified need in our community. Additionally, this enhancement will connect with the greenway infrastructure that further connects the park to other neighborhoods across the southside."

4. On November 22, 2024, at 2:33 PM, a citizen commented:

"I want to support using the HUD CDBG funding for the Optimist Park playground. This would be great for the community!"

5. On November 22, 2024, at 2:35 PM, a WICC member wrote:

"I am a member of WICC. I wanted to provide a public statement that I support using HUD CDBG funding for the Optimist Park Playground."

6. On November 22, 2024, at 2:38 PM, another citizen expressed:

"I am writing to voice my support in using HUD CDBG funding for the playground project at Optimist Park. Thanks for your consideration."

7. On November 22, 2024, at 2:43 PM, a couple stated:

"We support the Optimus Park project and appreciate the city of Cheyenne placing new equipment in a marginal neighborhood. Thank you for all you do."

### Conclusion

The public comments demonstrate overwhelming support for the Optimist Park project. Citizens recognize its potential benefits for the community, particularly in improving the neighborhood and physical environment of the historic south side of Cheyenne.



# Wyoming\*Independent\*Citizen\*Coalition Est. 2019

P.O. BOX 21431, Cheyenne, WY 82003

[wyindependentcitizenscoalition.com](http://wyindependentcitizenscoalition.com)

As the president of Wyoming Independent Citizen Coalition (WICC), I am providing public comment, of support, for the Optimist Park Playground project. We are excited to know that 290,000 in CDBG funding for proposed for a playground revitalization project at Optimist Park, 908 Carey Ave, Cheyenne, Wyoming, 82007. This initiative aligns with our ongoing mission to assist marginalized neighborhoods.

This will improve a neighborhood park on the Southside, where 62% of the population is classified as Low-to-Moderate income and this neighborhood is predominantly residential

Wyoming Independent Citizen Coalition understands there are key benefits like:

- Promotes childhood physical, social, emotional, and cognitive development
- Resolves ADA compliance issues, ensuring accessibility for all
- Provides a safe, engaging play space within walking distance for an LMI neighborhood
- Supports Optimist Park as a vital social gathering space for local families
- Contributes to community health and fitness
- Enhance the overall playground area utilization
- Improve ADA access with new concrete pathways

This community improvement could not be accomplished without CDBG support. The City's budget does not include funding for playground equipment replacement or upgrades, making grant funding the only opportunity to make these necessary improvements. This location for a playground upgrade is an ideal use of CDBG funding.

Also, we appreciate The Optimist Park Playground Revitalization Project represents a strategic investment in our community's future. By providing a safe, accessible, and engaging play space in a low-to-moderate income neighborhood, it will foster childhood development, promote community health, and ensure equal access to quality recreational facilities for all residents of Cheyenne.

In the past, CDBG funds have been considered for this neighborhood; however, limited. Amy Grady's passion to support South Cheyenne residents is evident and she highlights City of Cheyenne opportunities that address barriers in our community, like CDBG funding for a playground revitalization project at Optimist Park. We appreciate her and her tireless efforts.

Respectfully,

Carla L. Gregorio, MA 

President, WICC

**From:** [Media](#)  
**To:** [Matthew Murphy](#)  
**Subject:** Public review period to open for CDBG action plan amendment  
**Date:** Thursday, November 21, 2024 2:16:18 PM

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**For Immediate Release**  
**Nov. 21, 2024**

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**Contact:**  
Amy Gorbey  
Community Development Manager  
[agorbey@cheyennecity.org](mailto:agorbey@cheyennecity.org)

## **Public review period to open for CDBG action plan amendment**

*Funds will go toward new playground in Optimist  
Park*

**CHEYENNE** – The City of Cheyenne's Housing & Community Development Division has proposed a substantial amendment to the Community Development Block Grant Program Annual Action Plan for Program Year 2024. This amendment aims to reallocate \$291,884 in returned funds from a CDBG recipient to create a new ADA-compliant playground in Optimist Park.

The proposed playground will be located at 908 Carey Ave. and will replace existing aging equipment with new, ADA-compliant equipment; including new safety surfacing, improved access with concrete pathways, and enhancements to the overall playground area. The project benefits a low-to-moderate income area in Cheyenne.

If given final approval by City Council, the playground is expected to be completed by mid-2025. This project represents a significant step towards enhancing community facilities and ensuring accessibility for all residents of Cheyenne.

The proposed project will be undertaken by the City's Community Recreation & Events Department and aligns with the U.S. Department of Housing and Urban Development's national objectives and the City's 2020-2024 Consolidated Plan goal to improve public facilities.

As part of the reallocation of funds, a public comment period is required and residents may provide feedback on the proposal.

### **Public Comment Period**

The City of Cheyenne invites public input on the proposed amendment during a 30-day

comment period from Nov. 22 to Dec. 23, 2024. Residents are encouraged to review the amended plan and provide feedback.

**Availability of the Amended Plan:**

- Online: Housing & Community Development Division website:  
[www.cheyennecity.org/cdbg](http://www.cheyennecity.org/cdbg)
- In-person: Housing & Community Development Division, Mayor's Office, City Clerk's Office (2101 O'Neil Ave.), and Laramie County Library (2200 Pioneer Ave.)

**Submitting Comments:**

Comments will be accepted via email until Dec. 23, 2024, at 5 p.m. Please direct all comments and questions to Amy Gorbey, Community Development Manager, via e-mail at [agorbey@cheyennecity.org](mailto:agorbey@cheyennecity.org).

The City of Cheyenne is committed to providing reasonable accommodations for persons with disabilities to access city services, programs, and activities. All venues for participation are fully accessible. For accommodation requests, please contact Human Resources at 307-637-6340.

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Questions about the project should be directed to Amy Gorbey at [agorbey@cheyennecity.org](mailto:agorbey@cheyennecity.org).

###

**From:** [Amy Gorbey](#)  
**To:** [Zsoto.wendy@gmail.com](#); [Amy Spieker](#); [Andrew Corbine](#); [Angela Silvester](#); [Ann Clement](#); [Bookkeeper Needs, Inc.](#); [Brenda Birkle \(brenda@myfrontdoor.org\)](#); [Brooks Cotton \(brookscotton@cheyennechty.org\)](#); [Carla Gregorio \(carlagregorio58@gmail.com\)](#); [CJ Luca](#); [Daffney Sandoval](#); [Dan Dorsch](#); [Darlyn Tucker](#); [Dave Shumway](#); [Dominic Syracuse](#); [Dorsch, Angie](#); [Ed Boenisch](#); [ed@veteransrockchev.org](#); [eric@calc.net](#); [Erin LeBlanc \(ELeBlanc@cheyenneseniorcenter.org\)](#); [ezra@er@gmail.com](#); [Georgia Browles@USW.Salvationarmy.org](#); [GHancock@cheyennehousing.org](#); [heather.tupper@wyo.gov](#); [help@wyomingsafehouse.org](#); [Jane Cramb](#); [Jason Sanchez](#); [Jmanalo3@gmail.com](#); [Jen Solis \(jensolis@outlook.com\)](#); [Jessica Sayers](#); [Justin McCurry \(funddev@comeashelter.org\)](#); [Kelsea Warren](#); [Kristen-Erin Balderaz \(Director@needsinc.org\)](#); [kyle.F@calc.net](#); [lanamahoney.recoverwyoming.org](#); [Latisha Sims \(Trisha@calc.net\)](#); [Laura Fowler](#); [Martin, Mary](#); [mcox@wyhealthworks.org](#); [mdeets@cheyennehousing.org](#); [misty@familypromiseofcheyenne.org](#); [mnoah@whninc.org](#); [Olivia Schon](#); [PamishZonta@gmail.com](#); [Patty Walters](#); [Rachel Martinez](#); [rbrand@mealsonwheelsofcheyenne.com](#); [Robin Rocanegra](#); [Sam Payne](#); [Samm Logan \(samm@cheyennehfh.org\)](#); [Sara Burlingame](#); [Sara@ClimbWyoming.org](#); [stfreeman@mealsonwheelsofcheyenne.com](#); [Stacey Pearson](#); [Taylor May](#); [throsius@wyhealthworks.org](#); [Tia Fitzgerald](#); [Tim Ernst](#); [Wayne Hansen](#)  
**Subject:** Spread the Word: Public Comment Period for CDBG Action Plan Amendment  
**Date:** Friday, November 22, 2024 11:22:00 AM

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Dear CDBG City of Cheyenne Partners,

I hope you are doing well. I am writing to request your assistance in disseminating important information about an upcoming public comment period for a proposed amendment to our Community Development Block Grant (CDBG) Program Annual Action Plan for Program Year 2024.

#### Proposed Amendment Details

The City of Cheyenne's Housing & Community Development Division has proposed a substantial amendment to reallocate \$291,884 in returned funds. This reallocation aims to create a new ADA-compliant playground in Optimist Park at 908 Carey Ave.

#### Key Details

- The project will replace existing aging equipment with new, ADA-compliant equipment.
- Improvements include new safety surfacing, improved access with concrete pathways, and enhancements to the playground area.
- The project benefits a low-to-moderate income area in Cheyenne.
- If approved, the playground is expected to be completed by mid-2025.

#### Public Comment Period

We are seeking public input on this proposed amendment during a 30-day comment period from November 22 to December 23, 2024[1]. Please help spread the word about this opportunity for public feedback to your beneficiaries, stakeholders, and networks.

#### How to Participate

Please inform your contacts that they can review the amended plan and provide feedback:

1. Online: Visit the Housing & Community Development Division website at [www.cheyennecity.org/cdbg](http://www.cheyennecity.org/cdbg)

2. In-person: Review the plan at the following locations:

- Housing & Community Development Division
- Mayor's Office
- City Clerk's Office (2101 O'Neil Ave.)
- Laramie County Library (2200 Pioneer Ave.)

3. Submit Comments: Comments will be accepted via email until December 23, 2024, at 5 p.m. Comments and questions can be emailed to me at [agorbey@cheyennecity.org](mailto:agorbey@cheyennecity.org).

Your support in sharing this information is crucial to ensure broad community engagement in this important decision-making process. If you or your contacts have any questions about the project, please don't hesitate to contact me.

Thank you for your continued partnership and support in improving our community.

Best regards,

Amy

**Amy Gorbey**

Community Development Manager

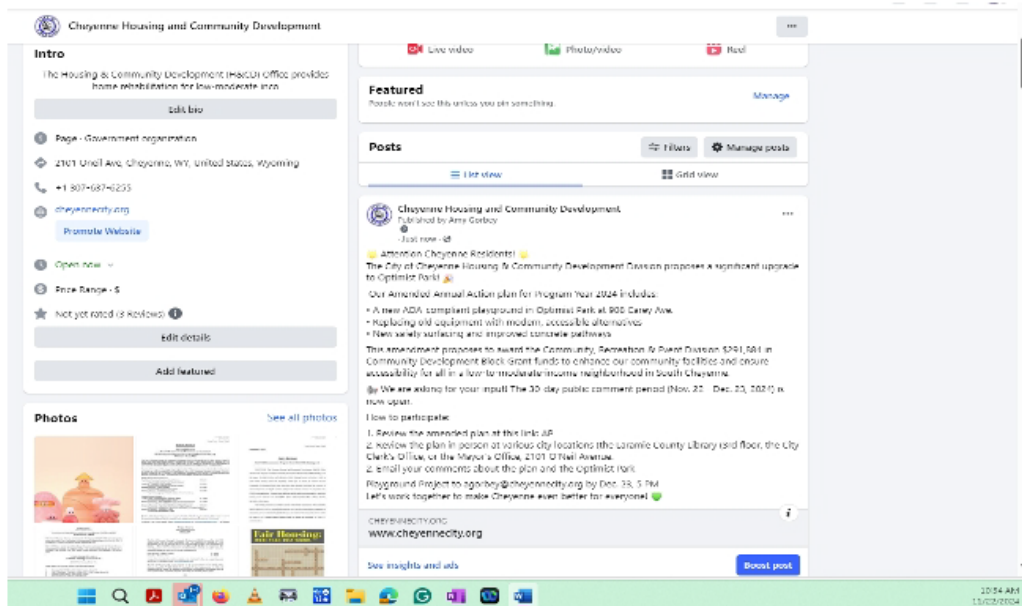
Housing & Community Development Division, City of Cheyenne

Mayor's Office

2101 O'Neil Ave. Room 3011

Cheyenne, WY 82001

(307) 637-6255



Facebook Post on 11-22-24 for the Public Comment Period for the Annual Action Plan Amendment for Program Year 2024. This post went out to 695 followers.



Attachment: Affidavits  
Program Year 2024  
Annual Action Plan



From:  
Wyoming Tribune Eagle  
702 W. Lincolnway  
Cheyenne, WY 82001

### Affidavit of Publication

Description of advertisement:  
2024 Community Development Block  
Grant  
Published: 09/23/23  
AD# 426103

THE STATE OF WYOMING } ss.  
County of Laramie }

I, D. B. [Signature], do  
solemnly swear that I am the Publisher's Agent  
of the **Wyoming Tribune Eagle**, a newspaper of  
general circulation published in the **County of  
Laramie, State of Wyoming**, that the notice of  
which the attached is a true copy, was published in  
said newspaper for 1 publications, the first having  
been made on 09/23/2023, and the last publication  
having been made on 09/23/2023; that said notice  
was published in the regular and entire issue of said  
newspaper during the period and times of publica-  
tion aforesaid and that the notice was published in  
the newspaper proper, and not in a supplement.

Publication fees: \$68.34

Subscribed and sworn to before me  
on this date: September 24, 2023



[Signature]  
Notary Public

**NEWS RELEASE**  
**H&CD Office announces**  
**Program Year 2024 CDBG**  
**funding cycle**  
CHEYENNE -The Cheyenne Housing and Community Development (H&CD) Office announces its Program Year 2024 Community Development Block Grant (CDBG) funding cycle has begun. The H&CD Office staff will hold a CDBG Training Session on October 4, 2023, at 2101 O'Neil Avenue, Room 104, beginning at 3:00 p.m., to present an overview of how Community Development Block Grant funds have been allocated in the past, an overview of national objectives and eligible activities, and provide technical assistance for preparation of a CDBG grant application. Potential grant applicants and the public are encouraged to attend this training session and learn more about CDBG. Application deadline is Friday, October 20, 2023, at 12:00 noon.  
The meeting location is accessible to persons with mobility impairments. Please notify the H&CD Office, 637-6255 or [davidout@cheyennedev.org](mailto:davidout@cheyennedev.org) if special accommodations (equipment or interpreting service for Limited English Proficiency) are needed or Wyoming Relay Service at 711 or 1-800-877-9975 during regular business hours to discuss the provision of TDD/TTY communication.  
September 23, 2023  
NO. 426103

From:  
Wyoming Tribune Eagle  
702 W. Lincolway  
Cheyenne, WY 82001

**Affidavit of Publication**

Description of advertisement:  
2024 Community Development Block  
Grant  
Published: 09/23/23  
AD# 426103

THE STATE OF WYOMING ) ss.  
County of Laramie )

I, Debbie Ruff, do  
solemnly swear that I am the Publisher's Agent  
of the **Wyoming Tribune Eagle**, a newspaper of  
general circulation published in the **County of  
Laramie, State of Wyoming**; that the notice of  
which the attached is a true copy was published in  
said newspaper for 1 publication, the first having  
been made on 09/23/2023, and the last publication  
having been made on 09/23/2023; that said notice  
was published in the regular and entire issue of said  
newspaper during the period and times of publica-  
tion aforesaid and that the notice was published in  
the newspaper proper, and not in a supplement.

Publication fees: \$68.54

Subscribed and sworn to before me  
on this date: September 29, 2023



Lasha Hernandez  
Notary Public

**NEWS RELEASE**  
**H&CD Office announces**  
**Program Year 2024 CDBG**  
**funding cycle**  
CHEYENNE -The Cheyenne Housing and Community Development (H&CD) Office announces its Program Year 2024 Community Development Block Grant (CDBG) funding cycle has begun. The H&CD Office staff will hold a CDBG Training Session on October 4, 2023, at 2101 O'Neil Avenue, Room 104, beginning at 3:00 p.m., to present an overview of how Community Development Block Grant funds have been allocated in the past, an overview of national objectives and eligible activities, and provide technical assistance for preparation of a CDBG grant application. Potential grant applicants and the public are encouraged to attend this training session and learn more about CDBG. Application deadline is Friday, October 20, 2023, at 12:00 noon.  
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September 23, 2023  
NO. 426103

# ADVERTISING PROOF

This is not a bill



PO Box 1570,  
Pocatello, ID 83204  
Ph. (307) 633-3112

BILLING DATE	ACCOUNT NO:
10/25/23	54212

CITY OF CHEYENNE CH CO  
2101 ONEIL AVE  
CHEYENNE, WY 82001

AD #	DESCRIPTION	START	STOP	TIMES	AMOUNT
438634	PUBLIC NOTICE CITY O	10/25/23	10/25/23	1	\$193.32



DEPARTMENT APPROVAL: I certify under penalty of perjury that the items listed hereon for my department's budget have been received and the account is correct and approved for payment.

PO Number
Signature

## Payments:

Date	Method	Card Type	Last 4 Digits	Check	Amount
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Discount: \$0.00  
Surcharge: \$0.00  
Credits: \$0.00

Gross: \$193.32  
Paid Amount: \$0.00

Amount Due: \$193.32

We Appreciate Your Business!

438634

**PUBLIC NOTICE  
CITY OF CHEYENNE  
PUBLIC HEARING ON THE POTENTIAL ALLOCATION OF  
HUD COMMUNITY DEVELOPMENT BLOCK GRANT FUNDS FOR  
PROGRAM YEAR 2024**

The City of Cheyenne Housing and Community Development (H&CD) Office and the H&CD Office Advisory Council is hereby giving notice that a Public Hearing is scheduled for November 1, 2023, between 3:30 p.m. and 4:00 p.m., via Zoom Meetings, or in person at 2102 O'Neil Avenue, Room 404 for residents of Cheyenne to review and comment on grant proposals submitted for HUD Community Development Block Grant (CDBG) Program Year 2024 funding.

Due to the U.S. Congress' delay in approving a budget, the City of Cheyenne has not received notice from the Department of Housing and Urban Development (HUD) regarding the City's CDBG Entitlement Allocation for Program Year 2024. However, to meet the City of Cheyenne's CDBG deadline for submission to HUD, the H&CD Office has accepted grant proposals for Program Year 2024. Grant proposals were received from the following organizations:

**Public (Human) Services Category . . .**

Equal Justice Wyoming Foundation – Legal Services To provide legal services for low-income residents	\$ 20,000
Needs, Inc. – Emergency Food Assistance To provide food security for low-income residents	\$ 30,000
Safehouse Services – Utility Assistance To provide utility assistance for the shelter	\$ 21,000
Safehouse Services – Victim Emergency Fund To provide emergency services for victims of domestic violence	\$ 10,000

**General Services Category . . .**

COMEA House – Rehabilitation of Temporary Shelter To provide an upgrade to the men's dorm	\$ 75,000
Habitat for Humanity – Home Rehabilitation for Low-Income Homeowners To provide for home rehabilitation for low-income homeowners	\$ 65,000
Habitat for Humanity – Acquisition/rehabilitation of blighted property To provide for the acquisition and possible rehabilitation of a blighted property	\$100,000
Habitat for Humanity – Acquisition of land To provide for the acquisition of land	\$100,000

Residents of the City of Cheyenne are encouraged to attend the Public Hearing, November 1, 2023, to learn more about the submitted grant proposals, provide comments on the grant proposals, and learn about the CDBG process.

For access to the Zoom Meeting contact [dwidau@cheyennecity.gov](mailto:dwidau@cheyennecity.gov) or [dwidau@cheyennecity.gov](mailto:dwidau@cheyennecity.gov). The meeting location is accessible to persons with mobility impairments. If special accommodations (equipment or interpreting service for Limited English Proficiency) are needed or Wyoming Relay Service at 711 or 1-800-877-9975 call 637-6255 during regular business hours to discuss the provision of TDD/TTY communication. October 25, 2023  
NO. 438634

From:  
Wyoming Tribune Eagle  
702 W. Lincolnway  
Cheyenne, WY 82001

Affidavit of Publication

Description of advertisement:  
PUBLIC NOTICE CITY OF CHEYENNE  
PUBLI  
Published: 10/25/23  
AD# 438634

THE STATE OF WYOMING ) ss.  
County of Laramie )  
I, Shelley Bissell, do  
solemnly swear that I am the Publisher's Agent  
of the Wyoming Tribune Eagle, a newspaper of  
general circulation published in the County of  
Laramie, State of Wyoming; that the notice, of  
which the attached is a true copy, was published in  
said newspaper for 1 publication, the first having  
been made on 10/25/2023, and the last publication  
having been made on 10/25/2023; that said notice  
was published in the regular and entire issue of said  
newspaper during the period and times of publica-  
tion aforesaid and that the notice was published in  
the newspaper proper, and not in a supplement.

Publication fees: \$193.32

Subscribed and sworn to before me  
on this date:

October 26, 2023

Barbara Shingleton

Notary Public - State of Wyoming  
Commission ID 146923  
My Commission Expires JANUARY 8, 2024

**PUBLIC NOTICE  
CITY OF CHEYENNE  
PUBLIC HEARING ON THE POTENTIAL ALLOCATION OF  
HUD COMMUNITY DEVELOPMENT BLOCK GRANT FUNDS FOR  
PROGRAM YEAR 2024**

The City of Cheyenne Housing and Community Development (H&CD) Office and the H&CD Office Advisory Council is hereby giving notice that a Public Hearing is scheduled for November 1, 2023, between 3:30 p.m. and 4:00 p.m., via Zoom Meetings, or in person at 2101 O'Neill Avenue, Room 104 for residents of Cheyenne to review and comment on grant proposals submitted for HUD Community Development Block Grant (CDBG) Program Year 2024 funding.

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**Public (Human) Services Category ...**

Equal Justice Wyoming Foundation - Legal Services	\$ 20,000
To provide legal services for low-income residents	
Needs, Inc. - Emergency Food Assistance	\$ 30,000
To provide food security for low-income residents	
Safehouse Services - Utility Assistance	\$ 21,000
To provide utility assistance for the shelter	
Safehouse Services - Victim Emergency Fund	\$ 10,000
To provide emergency services for victims of domestic violence	

**General Services Category ...**

COMEA House - Rehabilitation of Temporary Shelter	\$ 75,000
To provide an upgrade to the men's dorm	
Habitat for Humanity - Home Rehabilitation for Low-Income Homeowner	\$ 65,000
To provide for home rehabilitation for low-income homeowners	
Habitat for Humanity - Acquisition/Rehabilitation of blighted property	\$100,000
To provide for the acquisition and possible rehabilitation of a blighted property	
Habitat for Humanity - Acquisition of land	\$100,000
To provide for the acquisition of land	

Residents of the City of Cheyenne are encouraged to attend the Public Hearing, November 1, 2023, to learn more about the submitted grant proposals, provide comments on the grant proposals, and learn about the CDBG process.

For access to the Zoom Meeting contact [gwidauf@cheyennecity.org](mailto:gwidauf@cheyennecity.org) or [agorby@cheyennecity.org](mailto:agorby@cheyennecity.org). This meeting location is accessible to persons with mobility impairments. If special accommodations (equipment or interpreting service for Limited English Proficiency) are needed or Wyoming Relay Service at 711 or 1-800-877-9975 call 637-6255 during regular business hours to discuss the provision of TDD/TTY communication. October 25, 2023  
NO. 438634

# ADVERTISING INVOICE



PO Box 1570,  
Pocatello, ID 83204  
Ph. (307) 633-3112

BILLING DATE	ACCOUNT NO:
04/04/24	54212

CITY OF CHEYENNE CH CC  
2101 ONEIL AVE  
CHEYENNE, WY 82001

AD #	DESCRIPTION	START	STOP	TIMES	AMOUNT
489027	2024 ANNUAL ACTION P	04/05/24	04/09/24	1	\$196.46



CDBG / AMY G.

## Payments:

Date	Method	Credit Type	Last 4 Digits	Check	Amount
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Discount:	\$0.00
Surcharge:	\$0.00
Credits:	\$0.00

Gross: \$196.46  
Paid Amount: \$0.00

Amount Due: \$196.46

We Appreciate Your Business!

AD# 499027

Annual Action Plan  
2024

74

From:  
Wyoming Tribune Eagle  
702 W. Lincolnway  
Cheyenne, WY 82001

**Affidavit of Publication**

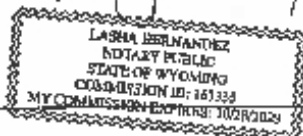
Description of advertisement:  
2024 ANNUAL ACTION PLAN  
Published: 04/06/24  
AD# 499027

THE STATE OF WYOMING  
County of Laramie

I, Sharon McDonald, do  
solemnly swear that I am the Publisher's Agent  
of the **Wyoming Tribune Eagle**, a newspaper of  
general circulation published in the County of  
**Laramie, State of Wyoming**; that the notice, of  
which the attached is a true copy, was published in  
said newspaper for 1 publications, the first having  
been made on 04/06/2024, and the last publication  
having been made on 04/06/2024; that said notice  
was published in the regular and entire issue of said  
newspaper during the period and times of publica-  
tion aforesaid and that the notice was published in  
the newspaper proper, and not in a supplement.

Publication fees: \$196.46

Subscribed and sworn to before me  
on this date: May 2, 2024



[Signature]  
Notary Public

**Legals**

**CITY OF CHEYENNE HOUSING  
& COMMUNITY DEVELOPMENT  
DIVISION  
2024 ANNUAL ACTION PLAN  
NOTICE OF PUBLIC REVIEW  
PERIOD AND PUBLIC  
HEARING**

This notice includes information on the public review period for the 2024 Annual Action Plan, and locations and ways for citizens to provide input. This document is required for submission to the U.S. Department of Housing and Urban Development (HUD) because the city receives Community Development Block Grant federal funds for housing and community development. Copies of this public notice will be distributed to partner entities serving a significant population of legally protected classes, special populations, persons in a federal "Presumed Benefit" category, or persons who may otherwise have barriers to public participation. The City of Cheyenne DRAFT FY24 Annual Action Plan (AAP) will be available for public review from April 7 to May 6, 2024. During this period, written comments on the 2024 Annual Action Plan may be submitted in person to the City of Cheyenne Housing & Community Development Division at 2101 O'Neil Avenue, 3rd Floor, Cheyenne, WY 82001, or via [agorby@cheyennediv.org](mailto:agorby@cheyennediv.org). For more information, call Amy Gorby, Community Development Manager at 307-637-6255. The AAP is available on the city's website at [www.cheyennediv.org/Your-Government/Departments/City-Treasurer/Housing-Community-Development-Division](http://www.cheyennediv.org/Your-Government/Departments/City-Treasurer/Housing-Community-Development-Division). Printed copies are available at the City Clerk's Office, the Mayor's Office, and the Laramie County Library.

The AAP identifies immediate actions proposed for the coming year and contributes to the more comprehensive Five-Year Consolidated Plan. The plan addresses housing and public service needs and identifies the funding allocations for each project. The City of Cheyenne H&CD Office anticipates that HUD will allocate \$448,011 and approximately \$94,000 in recaptured funding, Tier 1 and 2, to undertake its 2024 AAP. The recommended allocations for Public Service projects are: Equal Justice Wyoming Foundation: \$18,000 for Legal Services, Safehouse: \$10,000 for Victim's Assistance, and \$17,000 for Utility Assistance and Needs Inc.; \$20,000 for the Food Pantry. The recommended allocations for General Services projects are: Habitat for Humanity of Laramie County: \$88,000 for Home Rehabilitation for LMI Homeowners and \$299,000 for Acquisition and Rehabilitation of a Blighted Property for an LMI Homeowner.

A public hearing will be held, and a resolution will be presented to the Cheyenne City Council on April 22, 2024. The meeting will begin at 6:00 pm and be held in the Council Chambers at 2101 O'Neil Avenue, Cheyenne, WY 82001. A public meeting will be held during the City Council Finance Committee on May 6, 2024. The meeting begins at noon at 2101 O'Neil Avenue, Room 104. If the city council approves the 2024 Annual Action Plan, the city will submit the plan to HUD on or before May 17, 2024. HUD has 45 days to review the Plan. Citizens are encouraged to participate in both the public hearing and public meeting. The City of Cheyenne will make reasonable accommodations for access to city services, programs, and activities and make special communication arrangements for persons with disabilities. All venues for participation in this process are fully accessible. Individuals with a disability requesting reasonable accommodation may contact the Office of Human Resources at 307-637-6340 at least two business days before the meeting. For access to the Zoom Meeting, contact [agorby@cheyennediv.org](mailto:agorby@cheyennediv.org) at least three days prior to the hearing or meeting.

April 6, 2024  
NO. 499027



Attachment: City  
Council and Finance  
Committee Agendas  
Program Year 2024  
Annual Action Plan



**MUNICIPAL BUILDING**  
2101 O'Neil Avenue  
Cheyenne, WY 82001  
<http://www.cheyennecity.org>

**CITY COUNCIL MEETING**  
**COUNCIL CHAMBERS**  
**6:00 P.M.**

**AGENDA**

**April 22, 2024**

1. CALL MEETING TO ORDER.
2. CALL ROLL.
3. PLEDGE OF ALLEGIANCE.
4. CONSENT AGENDA.  
(All agenda items listed with the designation of [CA] are considered to be routine items by the governing body and will be enacted by one motion. There will be no separate discussion on these items unless a member of the governing body so requests and support by two other members is received. Any item removed from the Consent Agenda will be considered in its normal sequence on the agenda.)  
  
ACTION: \_\_\_\_\_
5. [CA] MINUTES FROM REGULAR MEETING OF THE GOVERNING BODY ON APRIL 8, 2024.  
  
ACTION: Approve \_\_\_\_\_
6. PUBLIC HEARINGS:
  - a) Public Hearing for the City's Annual Action Plan for Program Year 2024 prepared by the Cheyenne Housing and Community Development Division.  
  
ACTION: \_\_\_\_\_
7. ORDINANCE –2<sup>nd</sup> READING – Amending the Official Zoning Map of the City of Cheyenne changing the zoning classification from MUB Mixed-Use Business Emphasis to CB Community Business for land located at Lot 2, Block 1, Q-B Subdivision. (PUBLIC SERVICES COMMITTEE)  
  
ACTION: \_\_\_\_\_

8. ORDINANCE –2<sup>nd</sup> READING – Annexing to the City of Cheyenne, Wyoming, High Plains Road beginning at South Greeley Highway and terminating at Division Avenue. (PUBLIC SERVICES COMMITTEE)
- ACTION: \_\_\_\_\_
9. ORDINANCE –2<sup>nd</sup> READING – Annexing to the City of Cheyenne, Wyoming, land located east of Saratoga Street and west of Whitney Road. (PUBLIC SERVICES COMMITTEE)
- ACTION: \_\_\_\_\_
10. ORDINANCE –2<sup>nd</sup> READING – Amending the Official Zoning Map of the City of Cheyenne establishing the zoning classification of AR Agricultural Residential for land annexed to the City of Cheyenne located east of Saratoga Street and south of and adjacent to Laramie Street. (PUBLIC SERVICES COMMITTEE)
- ACTION: \_\_\_\_\_
11. ORDINANCE –2<sup>nd</sup> READING – Annexing to the City of Cheyenne, Wyoming, land located at 4204 Dell Range Boulevard. (PUBLIC SERVICES COMMITTEE)
- ACTION: \_\_\_\_\_
12. ORDINANCE –2<sup>nd</sup> READING – Amending the Official Zoning Map of the City of Cheyenne establishing the zoning classification of City MR Medium Density Residential for land annexed to the City of Cheyenne located at 4204 Dell Range Boulevard. (PUBLIC SERVICES COMMITTEE)
- ACTION: \_\_\_\_\_
13. ORDINANCE –2<sup>nd</sup> READING – Amending the Official Zoning Map of the City of Cheyenne changing the zoning classification from CB Community Business to P Public District for land located at Lot 1, Cheyenne Ice & Events Center, 2<sup>nd</sup> Filing located at 1530 West Lincolnway. (PUBLIC SERVICES COMMITTEE)
- ACTION: \_\_\_\_\_
14. ORDINANCE –1<sup>st</sup> READING – Amending Sections 1.4.3 Defined Terms and 5.8.8 Accessory Buildings of the Unified Development Code, clarifying Detached Buildings. (SPONSOR – MR. ROYBAL)
- ACTION: \_\_\_\_\_ Refer to Public Services Committee

15. ORDINANCE –1<sup>st</sup> READING – Amending Ordinance No. 4519 amending the Official Zoning Map of the City of Cheyenne changing the zoning classification from HI Heavy Industrial, AG Agricultural, and County A-2 to LI Light Industrial for land located west of Burlington Trail and south of and adjacent to HR Ranch Road. (SPONSOR – MR. ROYBAL)  
  
ACTION: Refer to Public Services Committee
16. ORDINANCE –1<sup>st</sup> READING – Amending Subsections 6.5.4.b.3 Incentives / Bonus, 6.5.4.b.4 Creative Sign Program, and 6.5.8.j Billboards of the Unified Development Code, to restructure sign incentives and bonuses by modifying allowances for signs near interstate highways, allowances for shared signs, eliminating the Creative Sign Program, and clarifying applicability of certain billboard allowances. (SPONSOR – MR. ROYBAL)  
  
ACTION: Refer to Public Services Committee
17. ORDINANCE –1<sup>st</sup> READING – Amending Section 5.1.5 of the Unified Development Code to allow for up to three stories for detached dwellings, semi-attached dwellings, and attached dwellings. (SPONSOR – MR. ROYBAL)  
  
ACTION: Refer to Public Services Committee
18. ORDINANCE –1<sup>st</sup> READING – Amending and updating the Solid Waste Fee Schedule in accordance with Section 8.44.010 of the Municipal Code of the City of Cheyenne, Wyoming, and repealing Ordinance No. 4503. (SPONSOR – DR. ALDRICH)  
  
ACTION: Refer to Finance Committee
19. ORDINANCE –1<sup>st</sup> READING – Amending Sections 10.82.030 and 10.82.040 of the Municipal Code of the City of Cheyenne, Wyoming, modifying the term of Dockless Vehicle licenses, specifying an effective date and making other conforming amendments. (SPONSORS – MR. ROYBAL, MR. SEGRAVE AND MR. WHITE)  
  
ACTION: Refer to Finance Committee
20. [CA] RESOLUTION – Expressing the support of the Governing Body for the adoption of the Cheyenne/Laramie County Emergency Operations Plan. (PUBLIC SERVICES COMMITTEE)  
  
ACTION: Adopt
21. RESOLUTION – Authorizing the Mayor and the City Clerk to sign a Final Plat for Carey Cottages, City of Cheyenne, Laramie County, Wyoming (located southeast of the intersection of Grove Drive and Cheyenne Street). (PUBLIC SERVICES COMMITTEE)  
  
ACTION: \_\_\_\_\_

22. RESOLUTION – Authorizing the Mayor and the City Clerk to sign a Final Plat for Sun Rise Hills North Subdivision, 3<sup>rd</sup> Filing, City of Cheyenne, Laramie County, Wyoming. (PUBLIC SERVICES COMMITTEE)

ACTION: \_\_\_\_\_

23. [CA] RESOLUTION – Adopting the City of Cheyenne 2024 Program Year Annual Action Plan prepared by the City of Cheyenne Housing & Community Development Office. (SPONSOR – MR. ESQUIBEL)

ACTION: \_\_\_\_\_ Refer to Finance Committee

24. [CA] RESOLUTION – Approving water and/or sanitary sewer service, by Outside User Agreement, for Robert GrandPre, for the property at Lot 1, Block 1, Green Subdivision, 4<sup>th</sup> Filing, Laramie County, Wyoming (east of Ridge Road and north of and adjacent to Green Court). (SPONSOR – MR. ROYBAL)

ACTION: \_\_\_\_\_ Refer to Public Services Committee

25. LEASES/CONTRACTS/LEGAL:

- a) Professional Services Agreement between the City of Cheyenne and DHM Design PC for engineering services for the 15<sup>th</sup> Street Master Plan Project. (2019-2022 Optional 1% Sales Tax Fund) (FINANCE COMMITTEE)

ACTION: \_\_\_\_\_

- b) [CA] Improvement Agreement between the City of Cheyenne and DB Cheyenne, LLC for acceptance of cash-in-lieu for public improvements including a turn lane, as required by the UDC and Traffic Impact Study for the development.

ACTION: \_\_\_\_\_ Refer to Finance Committee

- c) [CA] Professional Services Agreement between the City of Cheyenne and Univerus, Inc., for the Sanitation Rerouting and Optimization Project. (Solid Waste Fund)

ACTION: \_\_\_\_\_ Refer to Finance Committee

26. CONTRACT MODIFICATIONS:

- a) [CA] Contract Modification #2 to Contract #7775 between the City of Cheyenne and Sunrise Engineering for additional engineering services for the 7<sup>th</sup> Street Drainage and Access Improvements Project. (2019-2022 Optional 1% Sales Tax Fund)

ACTION: \_\_\_\_\_ Refer to Finance Committee

- b) [CA] Contract Modification #1 to Contract #7897 between the City of Cheyenne and Richardson Construction, Inc. for the Gymnastics Facility Project. (2019-2022 Optional 1% Sales Tax Fund)

ACTION: Refer to Finance Committee

27. CONSIDERATION OF BIDS/PURCHASES/REQUESTS FOR PROPOSALS:

- a) [CA] Consideration to Purchase for an agreement between the City of Cheyenne and Atmos Technologies, for providing daily cover on the active working face of the City of Cheyenne Happy Jack Landfill. (Solid Waste Fund) (FINANCE COMMITTEE)

ACTION: Approve the in an amount not to exceed \$270,000.00

- b) [CA] Consideration of Bid #S-2-24 for an agreement between the City of Cheyenne and Asphalt Preservation, LLC, for the 2024 Surface Seal Project #1. (2019-2022 Optional 1% Sales Tax Fund) (FINANCE COMMITTEE)

ACTION: Accept the bid in an amount not to exceed \$1,791,141.00

- c) [CA] Consideration of Bid #E-14-24 for 1.5 cubic yard rear-load dumpsters. (Solid Waste Fund) (FINANCE COMMITTEE)

ACTION: Accept the bid from Kois Brothers Equipment, Commerce City, CO, in an amount not to exceed \$78,360.00

- d) [CA] Consideration of Bid #E-15-24 for furnishing Bituminous Asphalt Hot Mix, Tack Oil, and Cold Mix on an annual basis, for the City of Cheyenne, Street & Alley Division. (2019-2022 Optional 1% Sales Tax Fund) (FINANCE COMMITTEE)

ACTION: Accept the bid from JTL Group Inc. d/b/a Knife River, Cheyenne, for hot mix and cold mix in the amount of \$438,250.00 and from Simon Contractors, Cheyenne, for tack oil in the amount of \$14,400.00 for a total bid of \$453,150.00

- e) [CA] Consideration of Bid #S-12-24 for an Agreement between the City of Cheyenne and JTL Group Inc. d/b/a Knife River, for the 2024 City Overlay #1 Project. (2021 Specific Purpose Option Tax Fund)

ACTION: Refer to Finance Committee

- f) [CA] Consideration of Bid #S-13-24 for an Agreement between the City of Cheyenne and Simon Contractors, for the 2024 City Overlay #2 Project. (2021 Specific Purpose Option Tax Fund)

ACTION: Refer to Finance Committee

- g) [CA] Consideration of Bid #S-15-24 for an Agreement between the City of Cheyenne and Asphalt Preservation, LLC, for the 2024 Surface Seal Project #2. (2021 Specific Purpose Option Tax Fund)

ACTION: Refer to Finance Committee

28. APPLICATIONS/LICENSES/PERMITS:

- a) [CA] Retail liquor license transfer of location application filed with the City Clerk's Office for Scooters Scoreboard LLC d/b/a Scooter's Scoreboard Bar, from 507 E. Lincolnway to 619 E. Lincolnway, Cheyenne, WY. (FINANCE COMMITTEE)

ACTION: Approve

- b) Retail liquor license transfer of ownership application filed with the City Clerk's Office for Wyoming Pipe Dreams, Inc. d/b/a The Lamp Lounge & Drive Through Package Liquor Store, 101 W. 6<sup>th</sup> St., Cheyenne, WY (license currently held by W.W. Enterprises, Inc. d/b/a The Lamp Lounge & Drive Through Package Liquor Store). (FINANCE COMMITTEE)

ACTION: \_\_\_\_\_

29. ANNOUNCEMENTS/REPORTS/MOTIONS:

- a) VOUCHER REPORT. \_\_\_\_\_

- b) REVENUE REPORT. \_\_\_\_\_

30. OTHER BUSINESS: \_\_\_\_\_

31. ADJOURN.

**FINANCE COMMITTEE  
AGENDA**

**Monday**  
May 6, 2024 – 12:00 p.m.

**OFFICE OF THE CITY COUNCIL  
MUNICIPAL BUILDING**

2101 O'Neil Avenue, Room 104  
Cheyenne, WY 82001  
[www.cheyennecity.org](http://www.cheyennecity.org)

**Web Access:**  
<https://us02web.zoom.us/j/81939132408?pwd=VXFNSGJEbm53NUd0ZnBNDQ4VzNxUT09>

**Passcode: FC05062024**

**Call in Access:**  
1-669-900-6833  
**Webinar ID: 819 3913 2408**  
**Passcode: 5169991464**

To view agenda backup documents visit the City of Cheyenne's web site:  
[Finance Committee \(granicus.com\)](http://Finance Committee (granicus.com))

- 
18. ORDINANCE –2<sup>nd</sup> READING – Amending and updating the Solid Waste Fee Schedule in accordance with Section 8.44.010 of the Municipal Code of the City of Cheyenne, Wyoming, and repealing Ordinance No. 4503. (SPONSOR – DR. ALDRICH)

ACTION:

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19. ORDINANCE –2<sup>nd</sup> READING – Amending Sections 10.82.030 and 10.82.040 of the Municipal Code of the City of Cheyenne, Wyoming, modifying the term of Dockless Vehicle licenses, specifying an effective date and making other conforming amendments. (SPONSORS – MR. ROYBAL, MR. SEGRAVE AND MR. WHITE)

ACTION:

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23. RESOLUTION – Adopting the City of Cheyenne 2024 Program Year Annual Action Plan prepared by the City of Cheyenne Housing & Community Development Office. (SPONSOR – MR. ESQUIBEL)

ACTION:

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25. LEASES/CONTRACTS/LEGAL:

- b) Improvement Agreement between the City of Cheyenne and DB Cheyenne, LLC for acceptance of cash-in-lieu for public improvements including a turn lane, as required by the UDC and Traffic Impact Study for the development.

ACTION:

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25. LEASES/CONTRACTS/LEGAL (continued):

- c) Professional Services Agreement between the City of Cheyenne and Univerus, Inc., for the Sanitation Rerouting and Optimization Project. (Solid Waste Fund)

ACTION:

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26. CONTRACT MODIFICATIONS:

- a) Contract Modification #2 to Contract #7775 between the City of Cheyenne and Sunrise Engineering for additional engineering services for the 7<sup>th</sup> Street Drainage and Access Improvements Project. (2019-2022 Optional 1% Sales Tax Fund)

ACTION:

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- b) Contract Modification #1 to Contract #7897 between the City of Cheyenne and Richardson Construction, Inc. for the Gymnastics Facility Project. (2019-2022 Optional 1% Sales Tax Fund)

ACTION:

---

27. CONSIDERATION OF BIDS/PURCHASES/REQUESTS FOR PROPOSALS:

- e) Consideration of Bid #S-12-24 for an Agreement between the City of Cheyenne and JTL Group Inc. d/b/a Knife River, for the 2024 City Overlay #1 Project. (2021 Specific Purpose Option Tax Fund)

ACTION:

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- f) Consideration of Bid #S-13-24 for an Agreement between the City of Cheyenne and Simon Contractors, for the 2024 City Overlay #2 Project. (2021 Specific Purpose Option Tax Fund)

ACTION:

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- g) Consideration of Bid #S-15-24 for an Agreement between the City of Cheyenne and Asphalt Preservation, LLC, for the 2024 Surface Seal Project #2. (2021 Specific Purpose Option Tax Fund)

ACTION:

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OTHER ITEMS FOR THE AGENDA:

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**MUNICIPAL BUILDING**  
2101 O'Neil Avenue  
Cheyenne, WY 82001  
<http://www.cheyennecity.org>

**CITY COUNCIL MEETING**  
**COUNCIL CHAMBERS**  
6:00 P.M.

**AGENDA**

**May 13, 2024**

1. CALL MEETING TO ORDER.
2. CALL ROLL.
3. PLEDGE OF ALLEGIANCE.
4. CONSENT AGENDA.  
(All agenda items listed with the designation of [CA] are considered to be routine items by the governing body and will be enacted by one motion. There will be no separate discussion on these items unless a member of the governing body so requests and support by two other members is received. Any item removed from the Consent Agenda will be considered in its normal sequence on the agenda.)  
  
ACTION: \_\_\_\_\_
5. [CA] MINUTES FROM REGULAR MEETING OF THE GOVERNING BODY ON APRIL 22, 2024.  
  
ACTION: Approve \_\_\_\_\_
6. ORDINANCE –3<sup>rd</sup> READING – Amending the Official Zoning Map of the City of Cheyenne changing the zoning classification from MUB Mixed-Use Business Emphasis to CB Community Business for land located at Lot 2, Block 1, Q-B Subdivision. (PUBLIC SERVICES COMMITTEE)  
  
ACTION: \_\_\_\_\_
7. ORDINANCE –3<sup>rd</sup> READING – Annexing to the City of Cheyenne, Wyoming, High Plains Road beginning at South Greeley Highway and terminating at Division Avenue. (PUBLIC SERVICES COMMITTEE)  
  
ACTION: \_\_\_\_\_

8. ORDINANCE –3<sup>rd</sup> READING – Annexing to the City of Cheyenne, Wyoming, land located east of Saratoga Street and west of Whitney Road. (PUBLIC SERVICES COMMITTEE)
- ACTION: \_\_\_\_\_
9. ORDINANCE –3<sup>rd</sup> READING – Amending the Official Zoning Map of the City of Cheyenne establishing the zoning classification of AR Agricultural Residential for land annexed to the City of Cheyenne located east of Saratoga Street and south of and adjacent to Laramie Street. (PUBLIC SERVICES COMMITTEE)
- ACTION: \_\_\_\_\_
10. ORDINANCE –3<sup>rd</sup> READING – Annexing to the City of Cheyenne, Wyoming, land located at 4204 Dell Range Boulevard. (PUBLIC SERVICES COMMITTEE)
- ACTION: \_\_\_\_\_
11. ORDINANCE –3<sup>rd</sup> READING – Amending the Official Zoning Map of the City of Cheyenne establishing the zoning classification of City MR Medium Density Residential for land annexed to the City of Cheyenne located at 4204 Dell Range Boulevard. (PUBLIC SERVICES COMMITTEE)
- ACTION: \_\_\_\_\_
12. ORDINANCE –3<sup>rd</sup> READING – Amending the Official Zoning Map of the City of Cheyenne changing the zoning classification from CB Community Business to P Public District for land located at Lot 1, Cheyenne Ice & Events Center, 2<sup>nd</sup> Filing located at 1530 West Lincolnway. (PUBLIC SERVICES COMMITTEE)
- ACTION: \_\_\_\_\_
13. ORDINANCE –2<sup>nd</sup> READING – Amending Sections 1.4.3 Defined Terms and 5.8.8 Accessory Buildings of the Unified Development Code, clarifying Detached Buildings. (PUBLIC SERVICES COMMITTEE)
- ACTION: \_\_\_\_\_
14. ORDINANCE –2<sup>nd</sup> READING – Amending Ordinance No. 4519 amending the Official Zoning Map of the City of Cheyenne changing the zoning classification from HI Heavy Industrial, AG Agricultural, and County A-2 to LI Light Industrial for land located west of Burlington Trail and south of and adjacent to HR Ranch Road. (PUBLIC SERVICES COMMITTEE)
- ACTION: \_\_\_\_\_

15. ORDINANCE –2<sup>nd</sup> READING – Amending Subsections 6.5.4.b.3 Incentives / Bonus, 6.5.4.b.4 Creative Sign Program, and 6.5.8.j Billboards of the Unified Development Code, to restructure sign incentives and bonuses by modifying allowances for signs near interstate highways, allowances for shared signs, eliminating the Creative Sign Program, and clarifying applicability of certain billboard allowances. (PUBLIC SERVICES COMMITTEE)
- ACTION: \_\_\_\_\_
16. ORDINANCE –2<sup>nd</sup> READING – Amending Section 5.1.5 of the Unified Development Code to allow for up to three stories for detached dwellings, semi-attached dwellings, and attached dwellings. (PUBLIC SERVICES COMMITTEE)
- ACTION: \_\_\_\_\_
17. ORDINANCE –2<sup>nd</sup> READING – Amending and updating the Solid Waste Fee Schedule in accordance with Section 8.44.010 of the Municipal Code of the City of Cheyenne, Wyoming, and repealing Ordinance No. 4503. (FINANCE COMMITTEE)
- ACTION: \_\_\_\_\_
18. ORDINANCE –2<sup>nd</sup> READING – Amending Sections 10.82.030 and 10.82.040 of the Municipal Code of the City of Cheyenne, Wyoming, modifying the term of Dockless Vehicle licenses, specifying an effective date and making other conforming amendments. (FINANCE COMMITTEE)
- ACTION: \_\_\_\_\_
19. ORDINANCE –1<sup>st</sup> READING – Approving and establishing revised water and sewer rates, tap and system development fees, administrative fees, service charges and penalties, and septic and commercial waste dump rates, as recommended by the Board of Public Utilities. (SPONSOR – DR. RINNE)
- ACTION: \_\_\_\_\_ Refer to Finance Committee
20. ORDINANCE –1<sup>st</sup> READING – Amending Chapter 5.78, Towing and Wrecker Recovery Operations, of Title 5, Business Licenses and Regulations, of the Municipal Code of the City of Cheyenne, Wyoming, modifying provisions governing towing and wrecker recovery operation licensure and the Police Department’s towing and wrecker recovery operation rotation list. (SPONSOR – MR. ROYBAL)
- ACTION: \_\_\_\_\_ Refer to Public Services Committee

21. ORDINANCE –1<sup>st</sup> READING – Appropriating moneys for the City of Cheyenne, Wyoming for the various purposes in conducting the municipal government of said City and fixing the amount of general and special taxes as part of the revenue required to meet the said appropriation, all for the Fiscal Year beginning July 1, 2024 and ending June 30, 2025. (SPONSOR – MR. ESQUIBEL)

ACTION: Refer to Committee of the Whole

22. [CA] RESOLUTION – Adopting the City of Cheyenne 2024 Program Year Annual Action Plan prepared by the City of Cheyenne Housing & Community Development Office. (FINANCE COMMITTEE)

ACTION: Adopt

23. [CA] RESOLUTION – Approving water and/or sanitary sewer service, by Outside User Agreement, for Robert GrandPre, for the property at Lot 1, Block 1, Green Subdivision, 4<sup>th</sup> Filing, Laramie County, Wyoming (east of Ridge Road and north of and adjacent to Green Court). (PUBLIC SERVICES COMMITTEE)

ACTION: Adopt

24. [CA] RESOLUTION – Adopting the fee schedule setting the approved towing service rates for towing charges related to calls for service by the Cheyenne Police Department made pursuant to the tow rotation list. (SPONSOR – MR. ROYBAL)

ACTION: Refer to Public Services Committee

25. [CA] RESOLUTION – Expressing the support of the Governing Body for the submission of an application by the Cheyenne Transit Program to the Wyoming Department of Transportation for grant funding under the Wyoming Rural Public Transit Program. (SPONSOR – DR. ALDRICH)

ACTION: Refer to Finance Committee

26. [CA] RESOLUTION – Supporting the submission of an application to the Wyoming Business Council under the Wyoming Business Ready Community Grant and Loan Program for an Enhancement Grant in support of the development of the Precision Industrial Park. (SPONSOR – DR. ALDRICH)

ACTION: Refer to Finance Committee

27. [CA] RESOLUTION – Authorizing the Mayor and the City Clerk to sign a Final Plat for Cheyenne Business Parkway, Thirteenth Filing, City of Cheyenne, Laramie County, Wyoming (located west of Christensen Road and south of and adjacent to Campstool Road). (SPONSOR – MR. ROYBAL)

ACTION: Refer to Public Services Committee

28. [CA] RESOLUTION – Authorizing the Mayor and the City Clerk to sign a Final Plat for Centennial Heritage, 3<sup>rd</sup> Filing, City of Cheyenne, Laramie County, Wyoming (located east of Savannah Drive and south and north of Raleigh Drive). (SPONSOR – MR. ROYBAL)

ACTION: Refer to Public Services Committee

29. [CA] RESOLUTION – Approving sanitary sewer service, by Outside User Agreement, for Laramie County, for the property known as the Archer Complex (south of the I-80 and Archer Parkway Interchange). (SPONSOR – MR. ROYBAL)

ACTION: Refer to Public Services Committee

30. [CA] RESOLUTION – Approving the budget of the Cheyenne Regional Airport Board for the for the Fiscal Year beginning July 1, 2024 and ending June 30, 2025. (SPONSOR – DR. RINNE)

ACTION: Refer to Finance Committee

31. [CA] RESOLUTION – Approving the budget of the Cheyenne Downtown Development Authority for the Fiscal Year beginning July 1, 2024 and ending June 30, 2025. (SPONSOR – MR. ROYBAL)

ACTION: Refer to Finance Committee

32. LEASES/CONTRACTS/LEGAL:

- a) Improvement Agreement between the City of Cheyenne and DB Cheyenne, LLC for acceptance of cash-in-lieu for public improvements including a turn lane, as required by the UDC and Traffic Impact Study for the development. (FINANCE COMMITTEE)

ACTION: \_\_\_\_\_

- b) [CA] Professional Services Agreement between the City of Cheyenne and Univerus, Inc., for the Sanitation Rerouting and Optimization Project. (Solid Waste Fund) (FINANCE COMMITTEE)

ACTION: Approve in an amount not to exceed \$142,676.00

- c) [CA] Professional Services Agreement between the City of Cheyenne and Landmark Aquatics, for the Johnson Pool Evaluation and Design Project. (2021 Specific Purpose Option Tax Fund)

ACTION: Refer to Finance Committee

- d) [CA] Professional Services Agreement between the City of Cheyenne and TPT Trails, LLC for the Belvoir Ranch, Phase 2 Design Build Trail Project. (Belvoir Recreation Fund)

ACTION: Refer to Finance Committee

33. CONTRACT MODIFICATIONS:

- a) [CA] Contract Modification #2 to Contract #7775 between the City of Cheyenne and Sunrise Engineering for additional engineering services for the 7<sup>th</sup> Street Drainage and Access Improvements Project. (2019-2022 Optional 1% Sales Tax Fund) (FINANCE COMMITTEE)

ACTION: Approve in an amount not to exceed \$6,500.00

- b) [CA] Contract Modification #1 to Contract #7897 between the City of Cheyenne and Richardson Construction, Inc. for the Gymnastics Facility Project. (2019-2022 Optional 1% Sales Tax Fund)

ACTION: Approve in an amount not to exceed \$74,292.50

- c) [CA] Renewal of Contract #7535 between the City of Cheyenne and Blue Cross Blue Shield of Wyoming for Third Party Administrator Services and Group Health Insurance benefits for City employees. (Self Insurance Fund)

ACTION: Refer to Finance Committee

- d) [CA] Renewal of Contract #6837 between the City of Cheyenne and Delta Dental for Group Dental Insurance benefits for City employees. (Various City Funds)

ACTION: Refer to Finance Committee

- e) [CA] Renewal of Contract #7523 between the City of Cheyenne and VSP Vision Insurance benefits for City employees. (Various City Funds)

ACTION: Refer to Finance Committee

- f) [CA] Renewal of Contract #7536 between the City of Cheyenne and Granular Insurance Company for Stop Loss Insurance for City employees. (Self Insurance Fund)

ACTION: Refer to Finance Committee

34. CONSIDERATION OF BIDS/PURCHASES/REQUESTS FOR PROPOSALS:

- a) [CA] Consideration of Bid #S-12-24 for an Agreement between the City of Cheyenne and JTL Group Inc. d/b/a Knife River, for the 2024 City Overlay #1 Project. (2021 Specific Purpose Option Tax Fund) (FINANCE COMMITTEE)

ACTION: Accept the bid in an amount not to exceed \$2,192,669.75

- b) [CA] Consideration of Bid #S-13-24 for an Agreement between the City of Cheyenne and Simon Contractors, for the 2024 City Overlay #2 Project. (2021 Specific Purpose Option Tax Fund) (FINANCE COMMITTEE)

ACTION: Accept the bid in an amount not to exceed \$1,518,379.60

- c) [CA] Consideration of Bid #S-15-24 for an Agreement between the City of Cheyenne and Asphalt Preservation, LLC, for the 2024 Surface Seal Project #2. (2021 Specific Purpose Option Tax Fund) (FINANCE COMMITTEE)

ACTION: Accept the bid in an amount not to exceed \$2,084,128.00

- d) [CA] Consideration of Bid #S-10-24 for an Agreement between the City of Cheyenne and Reiman Corp for the HAWK Signals Construction Project. (2019-2022 Optional 1% Sales Tax Fund)

ACTION: Refer to Finance Committee

- e) [CA] Consideration of Bid #S-20-24 for an Agreement between the City of Cheyenne and Simon Contractors for the Public Works Improvements Project. (2019-2022 Optional 1% Sales Tax Fund, Solid Waste Fund, & Fleet Maintenance Fund)

ACTION: Refer to Finance Committee

- f) [CA] Consideration of Bid #S-21-24 for an Agreement between the City of Cheyenne and Spire Building Group for the Municipal Building Restroom Renovations Project. (2021 Specific Purpose Option Tax Fund)

ACTION: Refer to Finance Committee

- g) [CA] Consideration of Bid #S-22-24 for an Agreement between the City of Cheyenne and Richardson Construction, Inc. for the Hitching Post Storm Sewer and Paul Smith Way Project. (2019-2022 Optional 1% Sales Tax Fund)

ACTION: Refer to Finance Committee

35. APPLICATIONS/LICENSES/PERMITS:

- a) [CA] Request to amend a previously approved outdoor seating area for consumption by adding an additional area relating to City of Cheyenne Bar & Grill liquor license held by Paris West Restaurant and Bar, located at 1719 Carey Avenue, Cheyenne, Wyoming.

ACTION: Refer to Finance Committee

36. ANNOUNCEMENTS/REPORTS/MOTIONS:

- a) Urban Renewal Authority 2023 Annual Report.

ACTION: \_\_\_\_\_

- b) VOUCHER REPORT. \_\_\_\_\_

- c) Announcement that due to the Memorial Day holiday on Monday, May 27, 2024, the regularly scheduled City Council meeting will instead be held on Tuesday, May 28, 2024. The meeting will be held at 2101 O'Neil Avenue in City Council Chambers and via electronic conference meeting at 6:00 p.m.

- d) Announcement of a Public Hearing to be held May 28, 2024 at 6:00 p.m. in City Council Chambers, 2101 O'Neil Avenue, Cheyenne, WY, and via electronic conference meeting, to hear public comment regarding the City's intent to apply for a 2024 Wyoming Business Council Business Ready Community Grant and Loan Program for a Community Readiness Project for essential infrastructure at the Precision Industrial Park.

37. OTHER BUSINESS: \_\_\_\_\_

38. EXECUTIVE SESSION: Pursuant to Wyoming Statute §16-4-405(a)(iii).

39. ADJOURN.





Attachment: Resolution to Adopt the Program Year  
2024 Annual Action Plan

RESOLUTION NO. 6491

**ENTITLED: "A RESOLUTION ADOPTING THE CITY OF CHEYENNE 2024  
PROGRAM YEAR ANNUAL ACTION PLAN PREPARED BY THE  
CHEYENNE HOUSING AND COMMUNITY DEVELOPMENT OFFICE."**

WHEREAS, the Department of Housing and Urban Development (HUD) provides funding to communities to address housing and urban development problems;

WHEREAS, the City of Cheyenne has been designated by HUD as an Entitlement Community and is eligible to receive an annual allocation of Community Development Block Grant (CDBG) funds based on the 2020-2024 Comprehensive Consolidated Plan which the Governing Body adopted on October 12, 2020; and

WHEREAS, the 2024 Program Year Annual Action Plan (Plan) has been developed in compliance with the City's Citizen Participation Plan, which requires citizen input and two public hearings including review and recommendations by the Housing and Community Development Office Advisory Council. A copy of the 2024 Annual Action Plan is attached to this resolution.

NOW, THEREFORE, BE IT RESOLVED BY THE GOVERNING BODY OF THE CITY OF CHEYENNE, WYOMING, that the 2024 Program Year Annual Action Plan is hereby adopted.

BE IT FURTHER RESOLVED, that the Mayor is authorized to submit the Plan, along with certificates, and to execute all HUD contracts and third-party agreements with operating and sponsoring agents necessary to implement and accomplish the 2024 Program Year Annual Action Plan.

PRESENTED, READ AND ADOPTED this 13th day of May, 2024.



Patrick Collins, Mayor

(SEAL)

ATTEST:

  
Kristina F. Jones, City Clerk



Attachment:  
Cheyenne Housing  
Authority Annual  
Action Plan 2024



<b>B.</b>	<b>Plan Elements</b>																		
<b>B.1</b>	<p><b>Revision of Existing PHA Plan Elements.</b></p> <p>(a) Have the following PHA Plan elements been revised by the PHA?</p> <p>Y N</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Statement of Housing Needs and Strategy for Addressing Housing Needs</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Deconcentration and Other Policies that Govern Eligibility, Selection, and Admissions.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Financial Resources.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Rent Determination.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Operation and Management.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Grievance Procedures.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Homeownership Programs.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Community Service and Self-Sufficiency Programs.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Safety and Crime Prevention.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Pet Policy.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Asset Management.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Substantial Deviation.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Significant Amendment/Modification</p> <p>(b) If the PHA answered yes for any element, describe the revisions for each revised element(s):</p> <p>Financial Resources: See resource listing on page 6.</p> <p>Rent Determination: Flat Rents Effective January 1, 2024 for Laramie and Cheyenne were adjusted based on 2024 Fair Market Rents.</p> <table border="1"> <thead> <tr> <th>City</th><th>Efficiency</th><th>One Bedroom</th><th>Two Bedroom</th><th>Three Bedroom</th><th>Four Bedroom</th></tr> </thead> <tbody> <tr> <td>Cheyenne</td><td>\$ 787</td><td>\$ 917</td><td>\$ 1,161</td><td>\$ 1,636</td><td>\$ 1,970</td></tr> <tr> <td>Laramie</td><td>\$ 767</td><td>\$ 841</td><td>\$ 1,017</td><td>\$ 1,433</td><td>\$ 1,726</td></tr> </tbody> </table> <p>(c) The PHA must submit its De-concentration Policy for Field Office review.</p>	City	Efficiency	One Bedroom	Two Bedroom	Three Bedroom	Four Bedroom	Cheyenne	\$ 787	\$ 917	\$ 1,161	\$ 1,636	\$ 1,970	Laramie	\$ 767	\$ 841	\$ 1,017	\$ 1,433	\$ 1,726
City	Efficiency	One Bedroom	Two Bedroom	Three Bedroom	Four Bedroom														
Cheyenne	\$ 787	\$ 917	\$ 1,161	\$ 1,636	\$ 1,970														
Laramie	\$ 767	\$ 841	\$ 1,017	\$ 1,433	\$ 1,726														
<b>B.2</b>	<p><b>New Activities.</b></p> <p>(a) Does the PHA intend to undertake any new activities related to the following in the PHA's current Fiscal Year?</p> <p>Y N</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Hope VI or Choice Neighborhoods.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Mixed Finance Modernization or Development.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Demolition and/or Disposition.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Designated Housing for Elderly and/or Disabled Families.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Conversion of Public Housing to Tenant-Based Assistance.</p> <p><input checked="" type="checkbox"/> <input type="checkbox"/> Conversion of Public Housing to Project-Based Rental Assistance or Project-Based Vouchers under RAD.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Occupancy by Over-Income Families.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Occupancy by Police Officers.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Non-Smoking Policies.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Project-Based Vouchers.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Units with Approved Vacancies for Modernization.</p> <p><input type="checkbox"/> <input checked="" type="checkbox"/> Other Capital Grant Programs (i.e., Capital Fund Community Facilities Grants or Emergency Safety and Security Grants).</p> <p>(b) If any of these activities are planned for the current Fiscal Year, describe the activities. For new demolition activities, describe any public housing development or portion thereof, owned by the PHA for which the PHA has applied or will apply for demolition and/or disposition approval under section 18 of the 1937 Act under the separate demolition/disposition approval process. If using Project-Based Vouchers (PBVs), provide the projected number of project-based units and general locations, and describe how project basing would be consistent with the PHA Plan.</p> <p>CHA is considering options to reposition the single-family portion of its Public Housing portfolio.</p>																		
<b>B.3</b>	<p><b>Progress Report.</b></p> <p>Provide a description of the PHA's progress in meeting its Mission and Goals described in the PHA 5-Year and Annual Plan.</p> <p>1. Expand the supply of assisted housing</p> <p>Objective 1: Apply for additional rental vouchers when available and feasible</p> <p>Progress: CHA has carefully considered the feasibility of every potential opportunity to expand the number of rental Housing vouchers, and has determined that it is not feasible to apply for the type of additional vouchers available.</p> <p>Objective 2: Fully utilize all resources available to the CHA including public housing at 98% or higher and housing choice voucher program at 98% or higher.</p> <p>Progress: As of November 1, 2023 CHA's voucher utilization is 98.3%. Public Housing occupancy is 98.5%.</p> <p>2. Improve the quality of assisted housing</p> <p>Objective 1: Achieve and maintain High Performer status</p>																		

	<p>Progress: March 2023 CHA received an 87 PHAS score, and is considered a Standard Performer.</p> <p>Objective 2: <b>Continue to enhance Resident Initiative efforts</b>  Progress: Each multifamily Public Housing property has an active Resident Council; meetings are supported with staff participation and implementation of feasible Council recommendations.</p> <p>Objective 3: Continue to utilize Capital Funds to the maximum benefit  Progress: The 5 Year Action Plan is updated annually to match Capital Fund plans and expenditures with property needs and needs identified by Residents, and promptly addresses emergent capital need resulting in well-maintained housing units. Long-term cost savings continue to be achieved with the replacement of carpet with luxury vinyl plank flooring in units and common areas. Capital funds are used to modernize units, including replacement of aluminum wire with copper wire in single family homes.</p> <p>Objective 4: Utilize Capital Funds to address security concerns of Residents, as warranted.  Progress: Security concerns of Residents are requested during creation of the Annual Agency Plan and throughout the year, and if feasible are promptly addressed.</p> <p>3. Advance affordable housing policy  Objective 1: Update the Housing Choice Voucher program Administrative Plan  Progress: The Administrative Plan was most recently updated in November 2023. CHA will continue to update the Administrative Plan as needed to remain current with regulatory requirements.</p> <p>Objective 2: Update the Public Housing Admissions and Continuing Occupancy Policy  Progress: The ACOP was completely updated effective June 1, 2023. CHA will continue to update the ACOP as needed to remain current with regulatory requirements.</p> <p>4. Alleviate compliance and security risks  Objective 1: Update Procurement Policies  Progress: Updated procurement policies were adopted in February 2020.</p> <p>Objective 2: Solicit Request for Proposals for Legal Services  Progress: Proposals were solicited and a 5-year legal services contract awarded in March 2020.</p> <p>Objective 3: Update Personnel Policies  Progress: A revision is in process with completion anticipated in 2024.</p> <p>Objective 4: Formalize the Agency Disaster Recovery Plan  Progress: CHA migrated all housing and accounting data to new cloud-based operating software and is continuing to implement all features of that software to protect CHA data and ensure recovery of data if/when needed. Formalization of the Plan is in process.</p> <p>5. Diversify housing choice  Objective 1: Research, evaluate and implement a Pine Bluffs Senior Housing repositioning plan  Progress: The repositioning plan to pay off the Rural Development loan on the Pine Bluffs property was completed in May 2022.</p> <p>Objective 2: Research and evaluate a Public Housing repositioning plan  Progress: Replacement of scattered-site single family homes is identified as a priority, evaluation of a repositioning plan is planned for 2024 after successful implementation of all components of CHA's new agency-wide operating software.</p>
<b>B.4</b>	<p><b>Capital Improvements.</b> Include a reference here to the most recent HUD-approved 5-Year Action Plan in EPIC and the date that it was approved.</p> <p>CHA's most recent HUD-approved 5-Year Action Plan was approved on March 30, 2023.</p>
<b>B.5</b>	<p><b>Most Recent Fiscal Year Audit.</b></p> <p>(a) Were there any findings in the most recent FY Audit?</p> <p>Y <input type="checkbox"/> N <input checked="" type="checkbox"/></p> <p>(b) If yes, please describe:  There was one finding identified during the Audit of Fiscal Year Ending March 31, 2023; CHA did not have procedures in place to ensure that it had the required General Depository Agreement with all financial institutions in which Public Housing or Housing Choice Voucher funds were invested. The finding was promptly corrected.</p>
<b>C.</b>	<p><b>Other Document and/or Certification Requirements.</b></p>
<b>C.1</b>	<p><b>Resident Advisory Board (RAB) Comments.</b></p> <p>(a) Did the RAB(s) have comments to the PHA Plan?</p> <p>Y <input type="checkbox"/> N <input checked="" type="checkbox"/></p> <p><input type="checkbox"/> This section will be completed after the Public Meeting scheduled for January 9, 2024.</p>

	(b) If yes, comments must be submitted by the PHA as an attachment to the PHA Plan. PHAs must also include a narrative describing their analysis of the RAB recommendations and the decisions made on these recommendations.							
<b>C.2</b>	<b>Certification by State or Local Officials.</b>  Form HUD-50077-SL, Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan, must be submitted by the PHA as an electronic attachment to the PHA Plan.							
<b>C.3</b>	<b>Civil Rights Certification/ Certification Listing Policies and Programs that the PHA has Revised since Submission of its Last Annual Plan.</b>  Form HUD-50077-ST-HCV-HP, PHA Certifications of Compliance with PHA Plan, Civil Rights, and Related Laws and Regulations Including PHA Plan Elements that Have Changed, must be submitted by the PHA as an electronic attachment to the PHA Plan.							
<b>C.4</b>	<b>Challenged Elements.</b> If any element of the PHA Plan is challenged, a PHA must include such information as an attachment with a description of any challenges to Plan elements, the source of the challenge, and the PHA's response to the public.  (a) Did the public challenge any elements of the Plan?  Y    N <input type="checkbox"/> <input type="checkbox"/> This section will be completed after the Public Meeting scheduled for January 9, 2024.  If yes, include Challenged Elements.							
<b>C.5</b>	<b>Troubled PHA.</b> (a) Does the PHA have any current Memorandum of Agreement, Performance Improvement Plan, or Recovery Plan in place? Y    N    N/A <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>  (b) If yes, please describe:							
<b>D.</b>	<b>Affirmatively Furthering Fair Housing (AFFH).</b>							
<b>D.1</b>	<b>Affirmatively Furthering Fair Housing (AFFH).</b>  Provide a statement of the PHA's strategies and actions to achieve fair housing goals outlined in an accepted Assessment of Fair Housing (AFH) consistent with 24 CFR § 5.154(d)(5). Use the chart provided below. (PHAs should add as many goals as necessary to overcome fair housing issues and contributing factors.) Until such time as the PHA is required to submit an AFH, the PHA is not obligated to complete this chart. The PHA will fulfill, nevertheless, the requirements at 24 CFR § 903.7(o) enacted prior to August 17, 2015. See Instructions for further detail on completing this item.  <table border="1" style="width: 100%;"> <tr> <td><b>Fair Housing Goal: CHA is not required to complete this chart for 2024.</b></td></tr> <tr> <td><u>Describe fair housing strategies and actions to achieve the goal</u></td></tr> <tr> <td> </td></tr> </table> <table border="1" style="width: 100%;"> <tr> <td><b>Fair Housing Goal:</b></td></tr> <tr> <td><u>Describe fair housing strategies and actions to achieve the goal</u></td></tr> <tr> <td> </td></tr> </table> <table border="1" style="width: 100%;"> <tr> <td><b>Fair Housing Goal:</b></td></tr> </table>	<b>Fair Housing Goal: CHA is not required to complete this chart for 2024.</b>	<u>Describe fair housing strategies and actions to achieve the goal</u>		<b>Fair Housing Goal:</b>	<u>Describe fair housing strategies and actions to achieve the goal</u>		<b>Fair Housing Goal:</b>
<b>Fair Housing Goal: CHA is not required to complete this chart for 2024.</b>								
<u>Describe fair housing strategies and actions to achieve the goal</u>								
<b>Fair Housing Goal:</b>								
<u>Describe fair housing strategies and actions to achieve the goal</u>								
<b>Fair Housing Goal:</b>								

	<u>Describe fair housing strategies and actions to achieve the goal</u>

Financial Resources FYE 2024 Planned Sources and Uses		
Sources	Planned \$	Planned Uses
<b>1. Federal Grants (FY 2024 grants)</b>		
a) Public Housing Operating Fund	1,641,185	1,641,185
b) Public Housing Capital Fund	1,050,824	1,050,824
c) HOPE VI Revitalization		
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance	11,330,000	11,330,000
Vash Vouchers	630,000	630,000
<b>2. Prior Year Federal Grants (unobligated funds only) (list below)</b>		
<b>3. Public Housing Dwelling Rental Income</b>	1,252,650	1,252,650
<b>4. Other income (list below)</b>		
Interest Income	12,600	12,600
Other Income	207,060	207,060
<b>4. Non-federal sources (list below)</b>		
<b>Total resources</b>	16,124,319	16,124,319





Attachment: WCDA  
Housing Needs  
Assessment  
2024



**Root Policy Research**

6741 E Colfax Ave, Denver, CO 80220

[www.rootpolicy.com](http://www.rootpolicy.com)

970.880.1415

Wyoming Community Development Authority

# Statewide Housing Needs Assessment

**PREPARED FOR:**

Wyoming Community Development Authority  
155 N Beech St, Casper, WY 82601  
[www.wyomingcda.com](http://www.wyomingcda.com)

**CREATED**

February 2024

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## SECTION I.

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### STATEWIDE OVERVIEW

## SECTION I. Statewide Overview

This section provides a general overview of the demographic and economic trends in the state of Wyoming. It gives a brief summary of the housing trends at a statewide level, including the rental and ownership markets. Additionally, it examines the different housing needs of various groups of the population and predicts the number of housing units that will be required to accommodate household growth until 2030.

### Key Findings

- Despite moderate population and employment growth, shifts in the state's base industries have led to a mismatch in affordability in the housing market.
- Development patterns have not kept up with industry employment shifts in many counties, where growth in employment in service-providing industries requires more diversity in housing types and price points to accommodate the workforce. The state should aim to expand housing production to accommodate and encourage economic growth. Currently, housing affordability for workers is a binding constraint for economic growth, as housing supply continues to be outstripped by demand and the workforce needed to support business growth struggles to find affordable housing.
- In the rental market, the dwindling supply of affordable units to low-income renters is exacerbated by higher-income renters occupying lower-priced units.
- In the ownership market, home prices continue rising and have not responded to higher interest rates, while higher interest rates have severely decreased affordability for those buying with a mortgage.
- The state is projected to experience moderate population growth in the coming years. However, the aging of the population has deep implications for future housing needs, as older adults living longer independently accelerate housing demand. Between 2021 and 2030, the state needs to add between 20,700 and 38,600 units. Of those:
  - Between 1,400 and 2,600 rental units will be needed to accommodate renter households with income at 30% AMI or below, and between 1,100 and 2,100 ownership units will be needed to accommodate owner households with income at 30% AMI or below.
  - Between 1,160 and 2,150 rental units will be needed to accommodate renter households with income between 31% and 50% AMI, and between 1,330

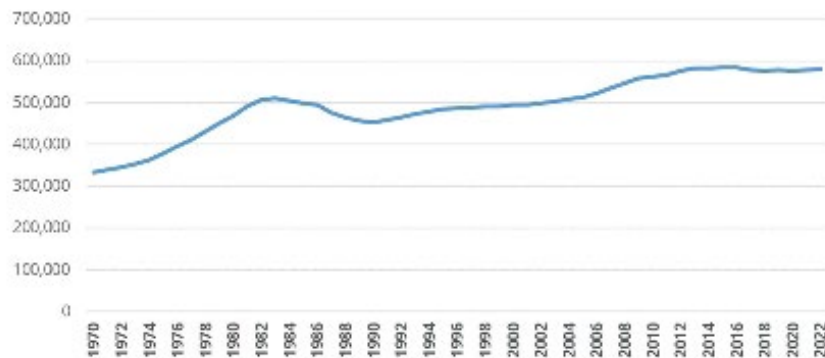
and 2,460 ownership units will be needed to accommodate owner households with income between 31% and 50% AMI.

- Additionally, current housing needs indicate the state has over 50,000 households under 100% AMI with at least one housing problem, including cost burden, overcrowding, lack of complete kitchen facilities, or lack of complete plumbing facilities. Among these households, over 20,000 have income at or below 30% AMI.
- Furthermore, the 2023 Point in Time survey counted 498 households made up of 532 individuals experiencing homelessness, and the most recent Department of Education data available for the academic year 2019-2020 indicates a total of 1,771 children and youth were experiencing homelessness.

## Demographic Trends

Figure I-1 shows the total population of Wyoming since 1970. The population of the state grew significantly during the 1970s, 1990s, and 2000s. However, between 2016 and 2020, the state lost population. Nonetheless, the trend appears to be reversing, as the population has increased by over 4,500 between 2020 and 2021.

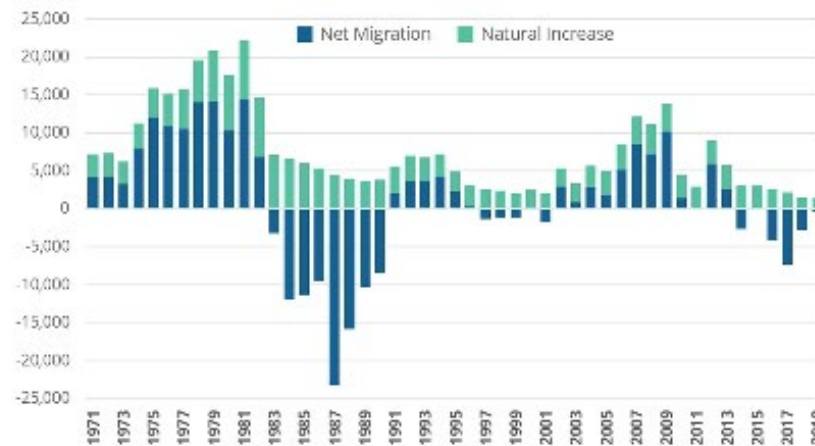
**Figure I-1.**  
**Total Population, Wyoming, 1970-2022**



Source: U.S. Decennial Census, ACS estimates, and Root Policy Research.

Figure I-2 shows the components of change in population, where natural increase is the difference between the number of births and the number of deaths in a given year, and net migration is the difference between the number of people moving into the state and the number of people moving out. As shown in the figure, the periods of rapid population growth were driven by in-migration.

**Figure I-2.**  
**Components of Population Change, Wyoming, 1971-2019**



Source: Wyoming Department of Health, U.S. Census Bureau, and Root Policy Research.

The population of Wyoming is ageing, in line with national trends. According to Figure I-3, the proportion of individuals aged 65 and over has risen from 12% in 2010 to 17% in 2021. The majority of this increase has occurred among those aged 65 to 74, whose percentage of the overall population has grown from 7% in 2010 to 10% in 2021. Meanwhile, the proportion of the population aged between 75 to 84 has increased from 4% to 5%, and those aged 85 and above have increased from 1% to 2%. It is crucial to prepare for the growth of the population aged 85 and over because they are more likely to require housing accessibility modifications, in-home care, meals, transportation, health services, and institutional care facilities.



**Figure I-3.**  
**Age Distribution,**  
**Wyoming, 2010 and**  
**2021**

Source:  
2010 and 2021 5-year ACS and Root  
Policy Research.

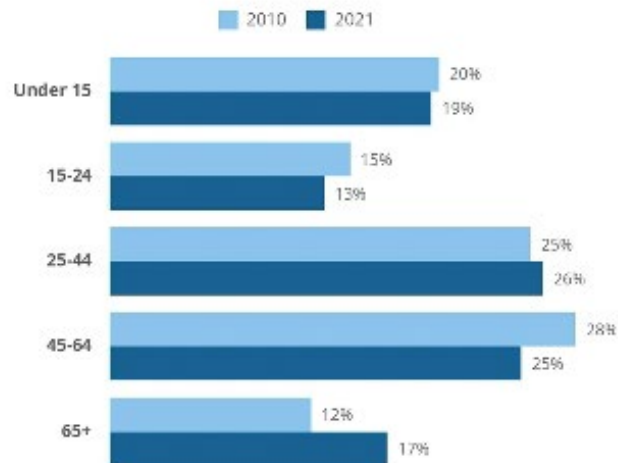
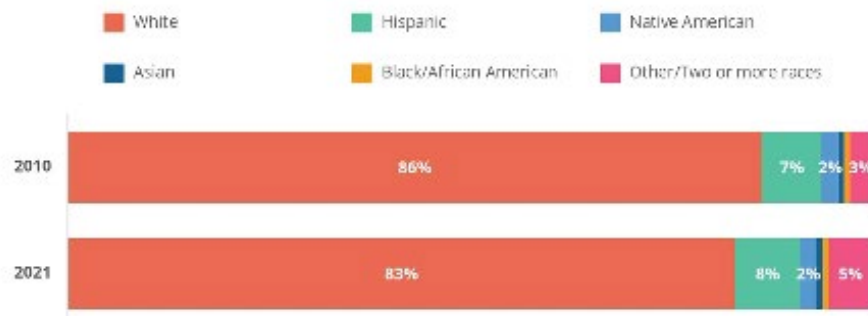


Figure I-4 shows how the age distribution has changed since 2010. The state is following the national trend of becoming more diverse, with a decrease in the share of the non-Hispanic White population and an increase in the share of the population of other races or of two or more races.

**Figure I-4.**  
**Race and Ethnicity, Wyoming, 2010 and 2021**



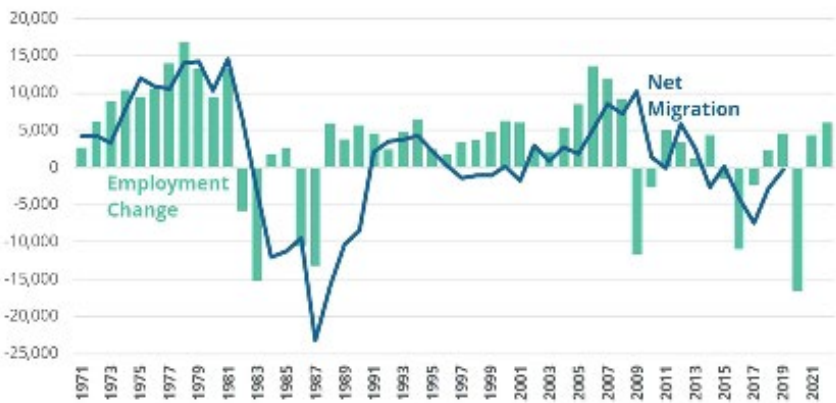
Note: The categories White, Native American, Asian, Black/African American, and Other/Two or more races include only non-Hispanic. The Hispanic category refers to Hispanics of any race. 0% and 1% labels are not shown.

Source: 2010 and 2021 5-year ACS and Root Policy Research.

Figure I-5 indicates that employment plays a significant role in the net migration of people. Despite the recent decline caused by the pandemic, employment has generally been on the

rise since 2018. This means that if employment growth continues, it will likely lead to an increase in migration to the state.

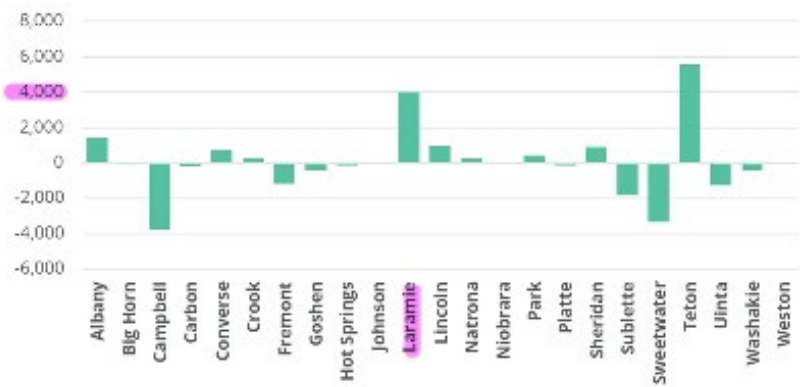
**Figure I-5.**  
**Net Migration and Employment Change, Wyoming, 1971-2021**



Note: Total non-farm employment.  
Source: Wyoming Department of Health, BLS Current Employment Statistics, and Root Policy Research.

However, as will be shown in more detail in the following sections, employment growth has been uneven across counties (Figure I-6), driven by the distributional shift towards service-providing industries.

**Figure I-6.**  
**Employment Change by County, 2010-2022**

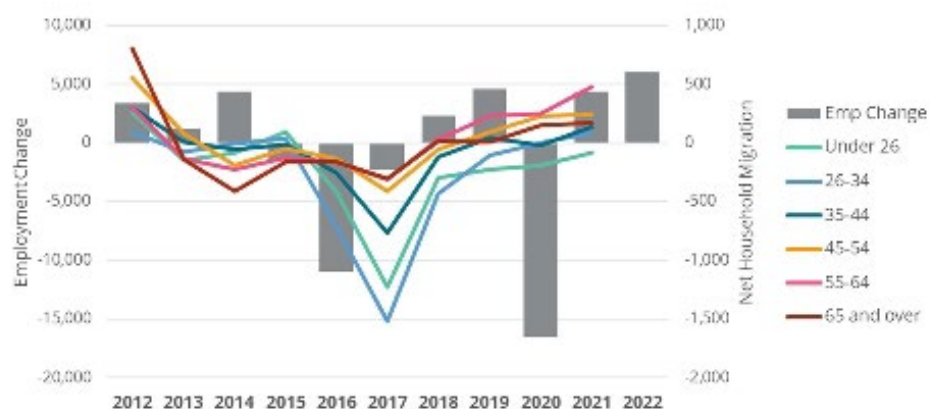


Source: BLS QCEW, and Root Policy Research.

The employment situation is a particularly strong driver of out-migration among younger households. Figure I-7 shows net migration<sup>1</sup> data based on year-to-year address changes reported on individual income tax returns filed with the IRS. As shown, younger households were more impacted by the employment losses during 2015-2017.

The figure also shows the increase in net migration the state has experienced; according to the data, net household migration was -831 in 2018, but net household migration turned positive in 2019 at 33, increased to 420 in 2020, and reached 1,063 households in 2021.

**Figure I-7.**  
**Employment Change and Net Household Migration by Age, Wyoming, 2012-2022**



Source: Internal Revenue Service and Root Policy Research.

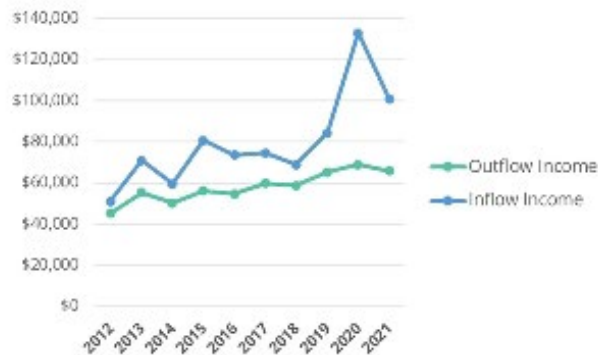
IRS data also provide the total adjusted gross income, which allows the estimation of the average adjusted gross income<sup>2</sup> for inflow and outflow returns each year. Figure I-8 shows the average income of in-migrants and the average income of out-migrants. As shown, in recent years, the state has attracted higher income in-migrants.

<sup>1</sup> Net migration is the difference between inflows and outflows, where inflows represent the number of new households who filed a return in the state and filed a return in a different state the previous year and outflows are the number of households who filed a return in a state other than Wyoming and had filed a return in Wyoming the previous year.

<sup>2</sup> Adjusted Gross Income (AGI) is defined as gross income minus adjustments to income. Gross income includes your wages, dividends, capital gains, business income, retirement distributions as well as other income. Adjustments to income include such items as Educator expenses, Student loan interest, Alimony payments or contributions to a retirement account.

**Figure I-8.  
Average Income of  
In-migrants and Out-  
migrants, Wyoming,  
2012-2021**

Source:  
Internal Revenue Service and Root  
Policy Research.

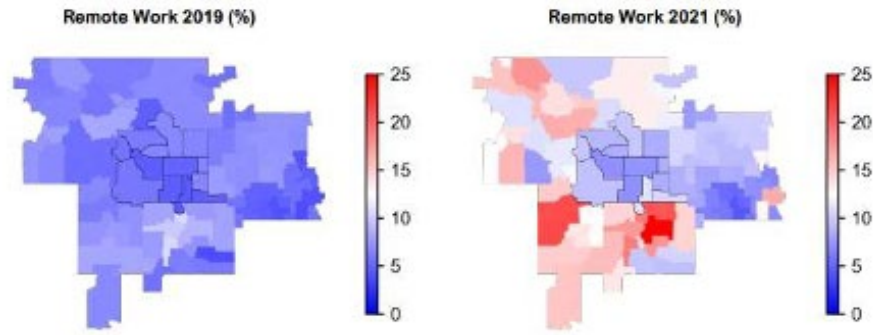


Another significant trend has been the increase in remote work. According to a recent report prepared by the Harvard Growth Lab "A Growth Perspective on Wyoming"<sup>3</sup> before the pandemic, remote work was uncommon across Wyoming and surrounding states. By 2021, remote work grew enormously, creating significant variation across commuting zones. The Wyoming commuting zones' share of remote work in 2021 range from 7.1% in Rawlins to 10.9% in Laramie. Other commuting zones in surrounding states with the highest percentage of remote workers are Denver (28%), Fort Collins (21%), Provo (21%), and Salt Lake City (21%).

As shown in Figure I-9, urbanized areas have seen a greater increase in remote work, and many people who moved away from urban centers due to remote work relocated to suburbs surrounding those cities. It should be noted that the degree to which the rise in remote work has attracted workers to the state is difficult to measure since data doesn't specify whether remote workers were already residing in the state and employed before their jobs became remote, or if they relocated to the state following the transition to remote work.

<sup>3</sup> <https://growthlab.hks.harvard.edu/publications/growth-perspective-wyoming>

**Figure I-9.**  
**Remote Work by Commuting Zone, Wyoming and Surrounding States,**  
**2019 and 2021**

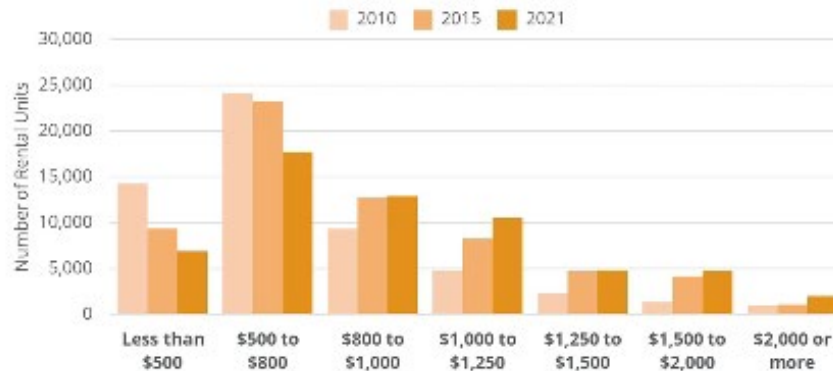


Source: <https://growthlab.hks.harvard.edu/publications/growth-perspective-wyoming>.

## Rental Market

According to ACS estimates, from 2010 to 2021 the median rent in Wyoming increased by 32%, from \$666 to \$878. However, during the same period, the median renter income only rose by 18%, from \$33,550 to \$39,506. Figure I-10 displays the distribution of rental units by price, and it is evident that the number of units priced below \$800 has significantly reduced.

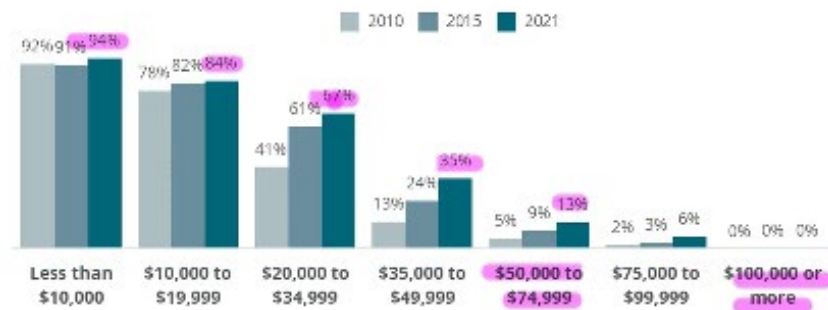
**Figure I-10.**  
**Rental Units by Price, Wyoming, 2010, 2015, and 2021**



Source: 2010, 2015, and 2021 5-year ACS and Root Policy Research.

The federal government considers housing to be affordable when the cost of housing, which includes the rent or mortgage payment, taxes, utilities, mortgage, insurance, and HOA fees, does not exceed 30% of a household's gross income. Households that spend more than 30% of their gross income on housing costs are considered cost burdened. As shown in Figure I-11, the percentage of cost-burdened households varies based on income and the rates of cost burden have increased across the income spectrum. As expected, the share of cost-burdened households increases as income decreases. However, the state has experienced significant increases in cost burden among households with incomes between \$20,000 and \$35,000, which increased from 41% in 2010 to 67% in 2021 and among households with incomes between \$35,000 and \$50,000, from 13% to 35%. Overall, the rate of cost burden among renters increased from 32% to 38% in the state.

**Figure I-11.**  
**Renter Cost Burden by Income, Wyoming, 2010, 2015, and 2021**

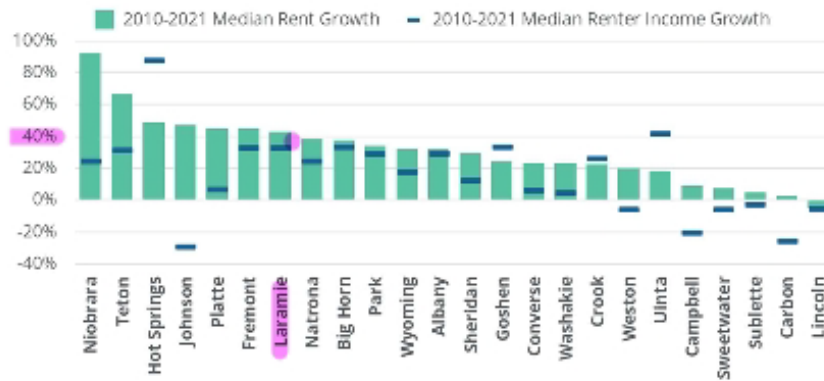


Source: 2010, 2015, and 2021 5-year ACS and Root Policy Research.

As shown in Figures I-12 and I-13, rent growth has outpaced renter income growth in most counties.



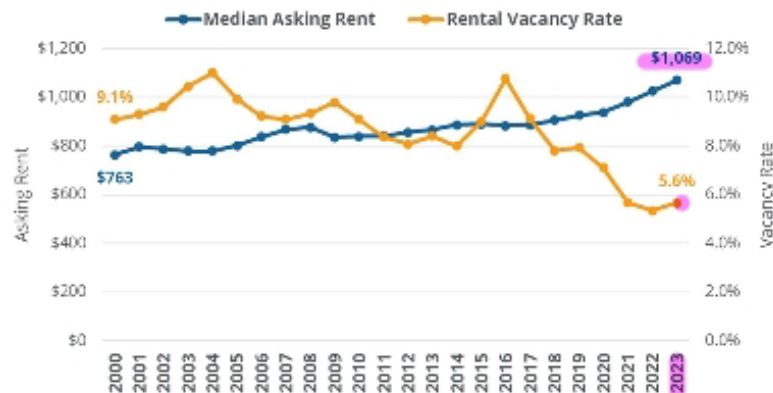
**Figure I-12.**  
**Rent and Renter Income Growth by County, 2010-2021**



Source: 2010 and 2021 5-year ACS and Root Policy Research.

Figure I-13 shows median rent and the rental vacancy rate according to CoStar— an analytics company that tracks commercial property markets across the United States. According to their estimates, the median asking rent for multifamily properties with five or more units is \$1,069 as of 2023 year-to-date. Their data also shows how the increase in rent over the past five years has been matched with a decrease in the vacancy rate.

**Figure I-13.**  
**Multifamily Median Asking Rent and Vacancy Rate, Wyoming, 2000-2023 YTD**



Note: Multifamily units are defined as units in buildings of 5+ units.

Source: CoStar and Root Policy Research.

Figure I-14 shows how the upward shift in prices disproportionately hurts lower income households. The numbers in the figure compare the number and share of renters with income below <\$25,000 with the number and share of units affordable to households with such income. The affordability gap is the number of affordable units minus the number of renter households. Between 2010 and 2021, the supply of rental units affordable to households with incomes of less than \$25,000 a year decreased by 47%—compared to a 13% decrease in the number of renters with incomes of less than \$25,000.

**Figure I-14.**  
**Affordability Gap for Households with Income Below \$25,000, Wyoming, 2000, 2010, and 2021**

	2000		2010		2021	
	Number	Percent	Number	Percent	Number	Percent
<b>Renters with income &lt;\$25,000</b>	29,861	51%	23,560	36%	20,414	31%
<b>Rental units affordably priced</b>	42,881	85%	27,442	48%	14,492	24%
<b>Affordability gap</b>	13,020	34%	3,882	12%	-5,922	-7%

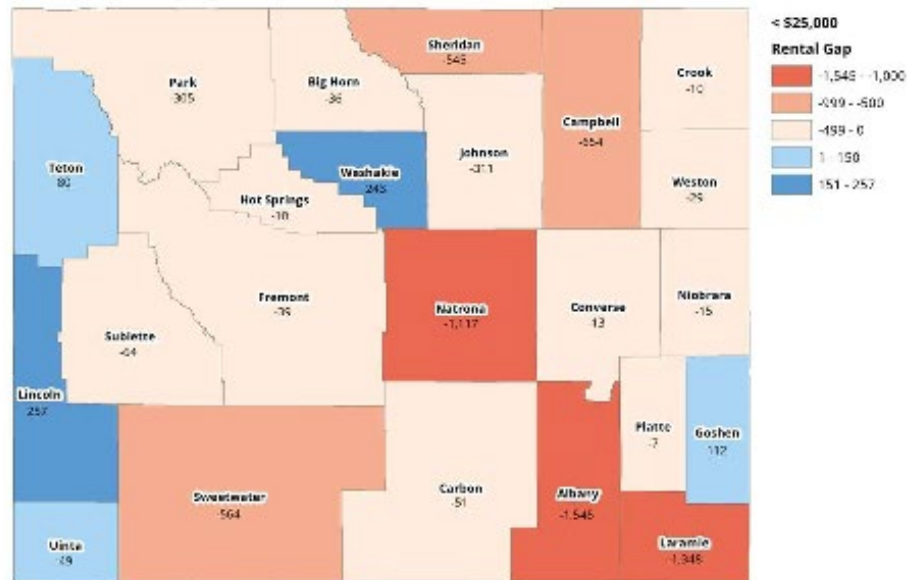
Note: Rental units refer to units priced below \$650.

Source: 2000 Decennial Census, 2010 and 2021 5-year ACS, and Root Policy Research.

The map in Figure I-15 shows the affordability gap in each county, with the largest gaps in Albany, Laramie, and Natrona counties.



**Figure I-15.**  
**Affordability Gap for Households with Income Below \$25,000 by County,**  
**2021**



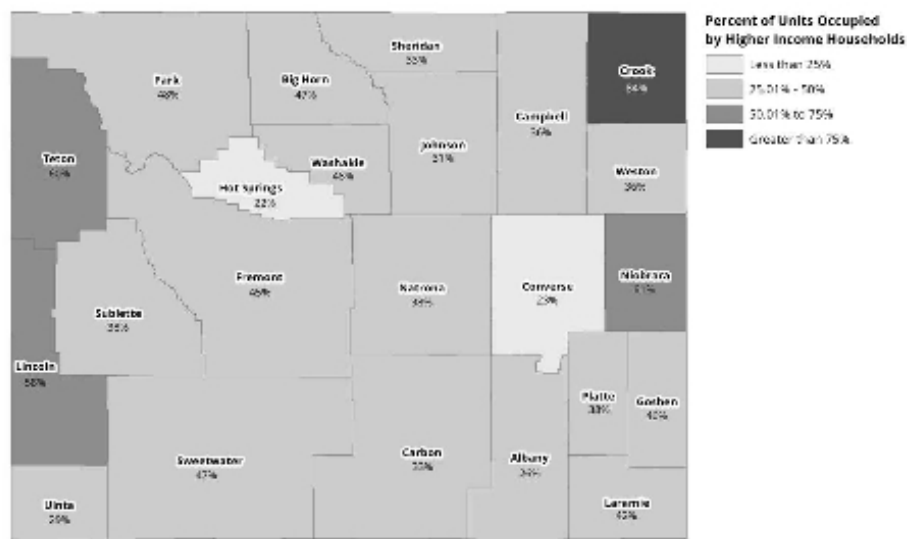
Note: Number of units affordable to households earning \$25,000 or less minus the number of renters with income of \$25,000 or less.

Source: 2021 5-year ACS, and Root Policy Research.

The previous map displays several blue counties that suggest they have an adequate number of affordable rental units for households with income under \$25,000. It should be noted that while Teton county shows a surplus, many low income individuals working in Teton county live outside the county due to a lack of local affordable housing. According to data from the Census Bureau's Longitudinal Employer-Household Dynamics data, in 2021, over 9,200 individuals worked in Teton county but lived outside the county.

Additionally, higher-income renters can opt to occupy lower-priced units, leading to increased competition for such units and increasing cost burden for lower and middle-income renters who now have to occupy higher priced units. Figure I-16 illustrates the percentage of units that are affordable to households earning \$35,000 or less and are occupied by higher-income households. As higher-income renters take up lower-priced units, the supply available for lower-income households decreases.

**Figure I-16.**  
**Percent of Units Affordable to Households Earning \$35,000 or Less that Are Occupied by Higher Income Households by County, 2021**



Source: 2021 5-year ACS, and Root Policy Research.

Figure I-17 shows the number of federally assisted affordable units by county. Around 40% of assisted units are located in Laramie and Natrona counties. The state has 8,300 subsidized rental units, in comparison to over 15,800 renter households that have an annual income below \$20,000.

**Figure I-17.**  
**Federally Assisted Rental Properties and Homes by County, 2022**

	Total Federally Assisted Rental Properties		Total Federally Assisted Rental Homes	
	Number	Percent of Total	Number	Percent of Total
Wyoming	230	100%	8,312	100%
Albany	10	4%	264	3%
Big Horn	4	2%	63	1%
Campbell	18	8%	785	9%
Carbon	6	3%	233	3%
Converse	11	5%	368	4%
Crook	2	1%	19	0%
Fremont	19	8%	509	6%
Goshen	5	2%	164	2%
Hot Springs	2	1%	59	1%
Johnson	3	1%	71	1%
Laramie	29	13%	1,699	20%
Lincoln	4	2%	76	1%
Natrona	36	16%	1,625	20%
Niobrara	2	1%	47	1%
Park	17	7%	314	4%
Platte	5	2%	81	1%
Sheridan	22	10%	748	9%
Sublette	1	0%	12	0%
Sweetwater	10	4%	526	6%
Teton	8	3%	185	2%
Uinta	9	4%	327	4%
Washakie	6	3%	113	1%
Weston	1	0%	24	0%

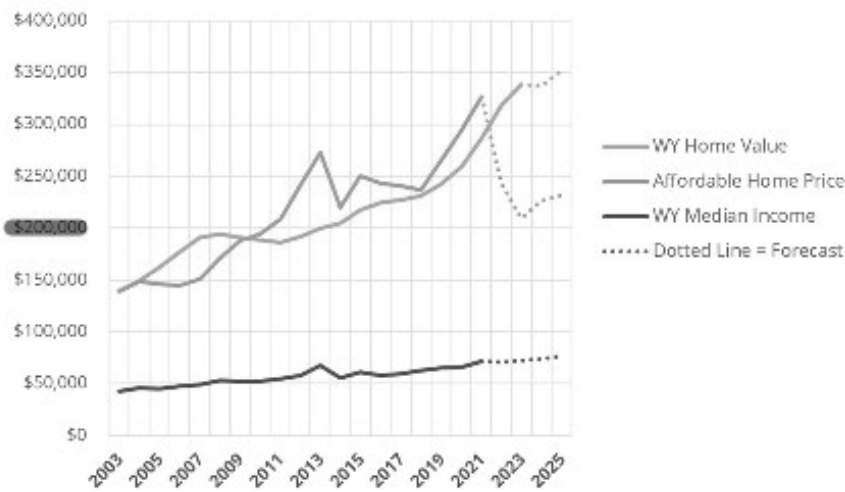
Note: The number of rental homes refers to the number of rental units with federal assistance, including apartment units.

Source: National Housing Preservation Database (NHDP), and Root Policy Research.

Ownership Market

Figure I-18 displays the typical home value for Wyoming based on Zillow's Home Value Index (ZHVI). The figure also compares it to the median household income and the price that is affordable to the median household income by using a mortgage. As depicted in the figure, in recent years, the growth of typical home values has surpassed the growth of median income. The affordable home price is highly affected by interest rates. Due to the increase in interest rates, homebuyer affordability has decreased significantly. Despite the recent moderation of interest rates in 2024, affordability levels continue to fall short of current home prices. As a result, home values remain beyond the reach of middle-income households.

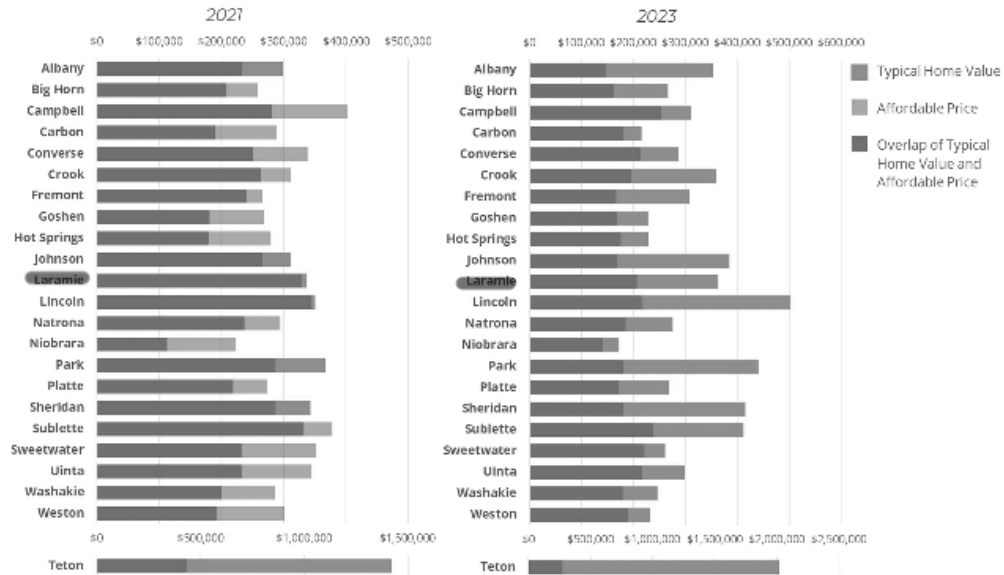
Figure I-18.  
Typical Home Value, Affordable Home Price, and Median Income, 2003-2025, Wyoming



Note: Assumes a 10% downpayment, 30% of payment goes to property taxes, utilities, insurance, etc. and the annual average interest rate for past years. For 2024 and 2025, 6.5% was used as the interest rate while 7% was used for 2023.  
Source: Zillow Analytics, US Census Bureau, and Freddie Mac.

Figure I-19 compares the typical home value to the affordable price at the median income for each county in 2021 and 2023. In 2023, the typical home value is unaffordable to households earning the median income in every county in Wyoming.

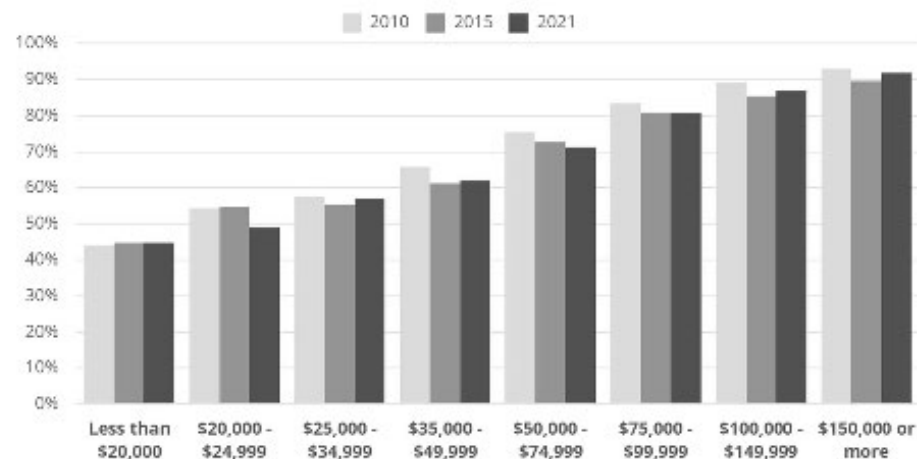
**Figure I-19.**  
**Affordability by County, 2021 and 2023**



Note: Assumes a 10% downpayment, 30% of payment goes to property taxes, utilities, insurance, etc., and a 7% interest rate for 2023 and 2.95% for 2021.  
Source: Zillow Analytics, US Census Bureau, and Freddie Mac.

Although the overall homeownership rate in the state increased from 70% in 2010 to 72% in 2021, this was driven by an increase in the number of higher income households. Figure I-20 shows that homeownership rate increases as income increases but it also shows that between 2010 and 2021 homeownership rates have decreased in most income category.

**Figure I-20.**  
**Homeownership Rate by Income, Wyoming, 2010, 2015, and 2021**

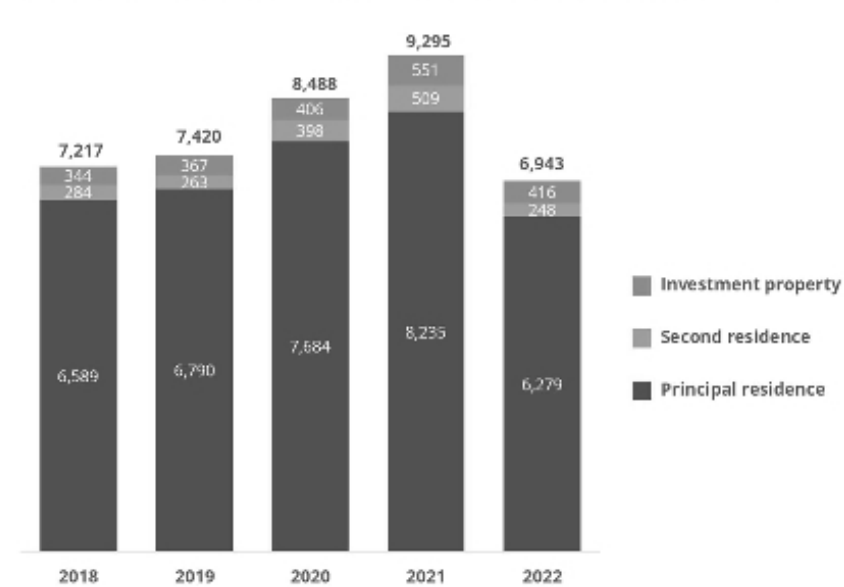


Source: 2010, 2015, and 2021 5-year ACS and Root Policy Research.

The next 2 figures show data on mortgage loan originations. Home Mortgage Disclosure Act (HMDA) data can be analyzed to understand shifts in home purchase activity by location, home value, occupancy type, and other factors. HMDA data only include home purchases with the use of a mortgage; home purchases made in cash, without a mortgage, are not included in the data. Therefore, the following estimates undercount the total volume of home purchases.

Figure I-21 shows the volume of home loan originations in the state by occupancy type. The number of loan originations dropped significantly in 2022 with the rise in interest rates. Around 91% of mortgage originations were for primary residences, around 4% for second homes, and 5% for investment properties and these shares have remained stable since 2018.

**Figure I-21.**  
**Home Loan Originations by Occupancy Type, Wyoming, 2018-2022**

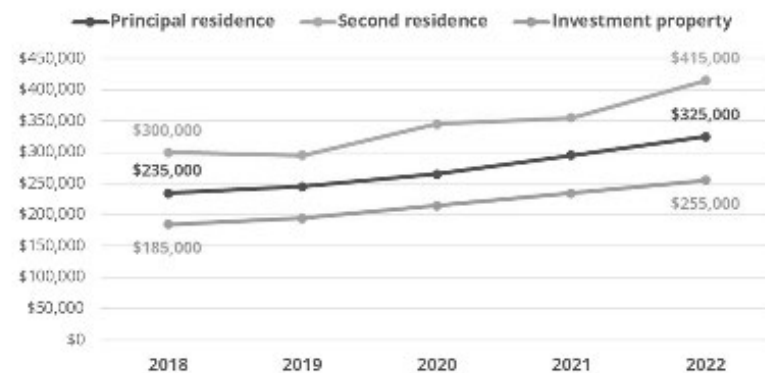


Note: Includes first lien loan originations only

Source: HMDA and Root Policy Research.

Figure I-22 shows the median price of the properties by occupancy type. Second homes have a higher median price than principal residences while investment properties have a lower median price. Between 2018 and 2022, homes in all occupancy types experienced an increase in the median price of 38%.

**Figure I-22.**  
**Median Home Value for Originated Loans by Occupancy Type, Wyoming, 2018-2022**



Note: Includes first lien loan originations only  
Source: HMDA and Root Policy Research.

The next 3 figures show assessor data from Wyoming's Department of Revenue for home sales in 2022 for single-family homes on ten acres or less. Figure I-23 shows the total number of sales and the distribution and median price among different structure types. Single family detached had the highest median price while duplexes had the lowest.

**Figure I-23.**  
**Median Home Sales Price by Structure Type, Wyoming, 2022**

	Number Of Sales	Percent of Sales	Median Sales Price
All units	8,409	100%	\$296,000
Single family	6,819	81%	\$308,000
Duplex	219	3%	\$200,500
Townhome/Condo	892	11%	\$260,000
Modula/Mobile home	479	6%	\$260,000

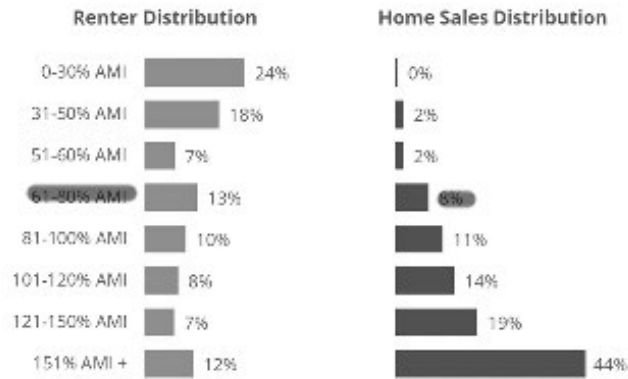
Source:  
Assessor data by the Wyoming Department of Revenue.

Figure I-24 shows the distribution of renters and home sales by Area Median Income (AMI). The renter distribution presents the distribution of renter incomes by AMI range, while the home sales distribution presents the distribution of homes sold affordable to households with such income levels without being cost burdened. Although around 43% of renters have incomes below 50% AMI, only 2% of the homes sold in 2022 were affordable to individuals in this price range. Around 73% of renters have incomes below 100% AMI, while only 23% of homes sold in 2022 were affordable to individuals earning less than 100% AMI.



Figure I-24.

**Renter and Affordable Home Sales Distribution by AMI, Wyoming**

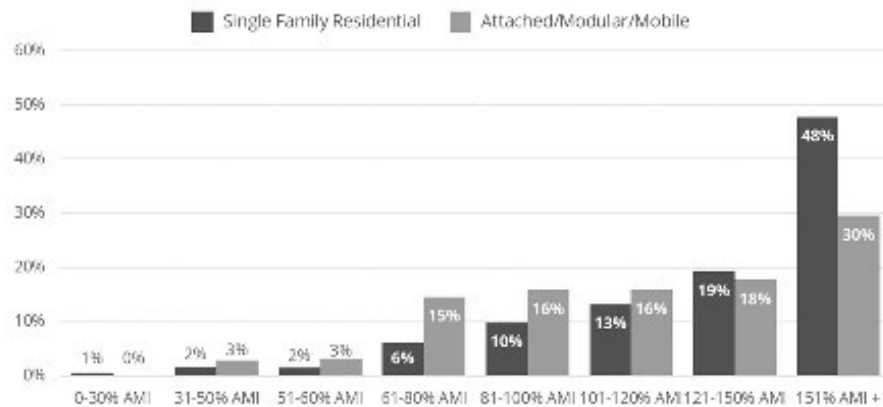


Note: Affordability estimates assume that a household spends 30% of their income on housing and assume a 30-year mortgage with a 7% interest rate, a 10% down payment, and 30% of monthly payment to property taxes, utilities, and insurance.

Source: 2021 5-year ACS, Assessor data by the Wyoming Department of Revenue, and Root Policy Research.

Figure I-25 displays the shares of total single family homes and attached, modular, and mobile homes sold in 2022 that were affordable to buyers in each AMI range. While single family homes are concentrated in the higher affordability ranges, a greater share of attached, modular, and mobile homes are affordable to low to moderate income households. It is important to note that the region's housing stock is dominated by single family homes, so low to moderate income buyers interested in purchasing attached, modular, or mobile homes in their price ranges face significant supply constraints.

**Figure I-25.**  
**Home Sales Distribution by AMI and Unit Type, Wyoming, 2022**



Note: Affordability estimates assume that a household spends 30% of their income on housing and assume a 30-year mortgage with a 7% interest rate, a 10% down payment, and 30% of monthly payment to property taxes, utilities, and insurance.

Source: Assessor data by the Wyoming Department of Revenue and Root Policy Research.

As noted before, assessor data from Wyoming's Department of Revenue for home sales in 2022 for single-family homes on ten acres or less, assuming HMDA data is an accurate estimate of loan originations for such homes, implies that up to 17% (1,466 homes) out of the 8,409 may have been purchased with cash in 2022.

### Workforce Housing

As shown in Figures I-26 and I-27 the state has experienced a distributional shift towards service providing industries, particularly Education and Health Services and Leisure and Hospitality.

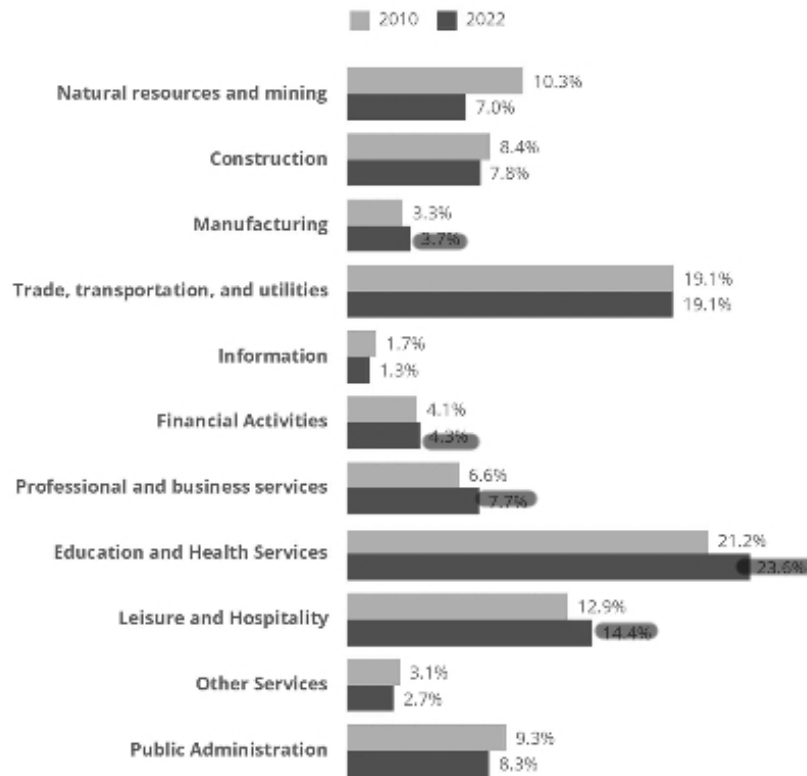
Figure I-26.

**Average Annual Employment by Industry, Wyoming, 2010 and 2022**

	Employment		2010-2022 Change	
	2010	2022	Amount	Percent
Goods Producing	58,724	50,556	-8,168	-14%
Natural resources and mining	27,507	18,959	-8,548	-31%
Construction	22,352	21,265	-1,087	-5%
Manufacturing	8,713	10,197	1,484	17%
Service Providing	207,726	221,536	13,810	7%
Trade, transportation, and utilities	50,955	51,911	956	2%
Information	4,546	3,616	-930	-20%
Financial activities	10,900	11,604	704	6%
Professional and business services	17,453	21,002	3,549	20%
Education and health services	56,383	64,223	7,840	14%
Leisure and hospitality	34,378	39,063	4,685	14%
Other services	8,270	7,425	-845	-10%
Public administration	24,841	22,692	-2,149	-9%
All Industries	266,450	272,092	5,642	2%

Source: Quarterly Census of Employment and Wages and Root Policy Research.

**Figure I-27.**  
**Employment Distribution by Industry, Wyoming, 2010 and 2022**



Source: Quarterly Census of Employment and Wages and Root Policy Research.

As shown in Figure I-28 the growing Education and Health Services and Leisure and Hospitality industries are not high wage industries.

**Figure I-28.**  
**Average Annual Wage by Industry, Wyoming, 2010 and 2022**

	Annual Average Wage		2010-2022 Change	
	2010	2022	Amount	Percent
Goods Producing	\$60,053	\$76,371	\$16,318	27%
Natural resources and mining	\$72,896	\$91,516	\$18,620	26%
Construction	\$47,641	\$62,282	\$14,641	31%
Manufacturing	\$51,823	\$78,050	\$26,227	51%
Service Providing	\$37,798	\$51,781	\$13,983	37%
Trade, transportation, and utilities	\$36,732	\$49,875	\$13,143	36%
Information	\$36,495	\$64,143	\$27,648	76%
Financial activities	\$44,051	\$78,638	\$34,586	79%
Professional and business services	\$44,860	\$73,536	\$28,676	64%
Education and health services	\$40,662	\$53,857	\$13,195	32%
Leisure and hospitality	\$17,562	\$27,784	\$10,222	58%
Other services	\$33,854	\$44,988	\$11,134	33%
Public administration	\$46,047	\$57,405	\$11,358	25%
All Industries	\$42,703	\$56,350	\$13,647	32%

Source: Quarterly Census of Employment and Wages and Root Policy Research.

The following figures show housing affordability for different industries and occupations. These are for illustrative purposes and generally assume workers have one job. While workers may hold more than one job and households can have more than one worker, these estimates present a baseline affordability estimate that is useful since the number of jobs individuals hold and the number of workers per household is impacted by housing costs, among other variables.

Figure I-29 shows housing affordability by industry by comparing median rent and median home sales prices with rental and ownership affordability thresholds for individuals earning the average annual wages of each industry. In 2022, median rent was affordable to individuals earning average wages in all industries except for Leisure & Hospitality while the median home price was unaffordable to individuals earning average wages in all industries.

**Figure I-29.**  
**Housing Affordability by Industry, Wyoming, 2022**

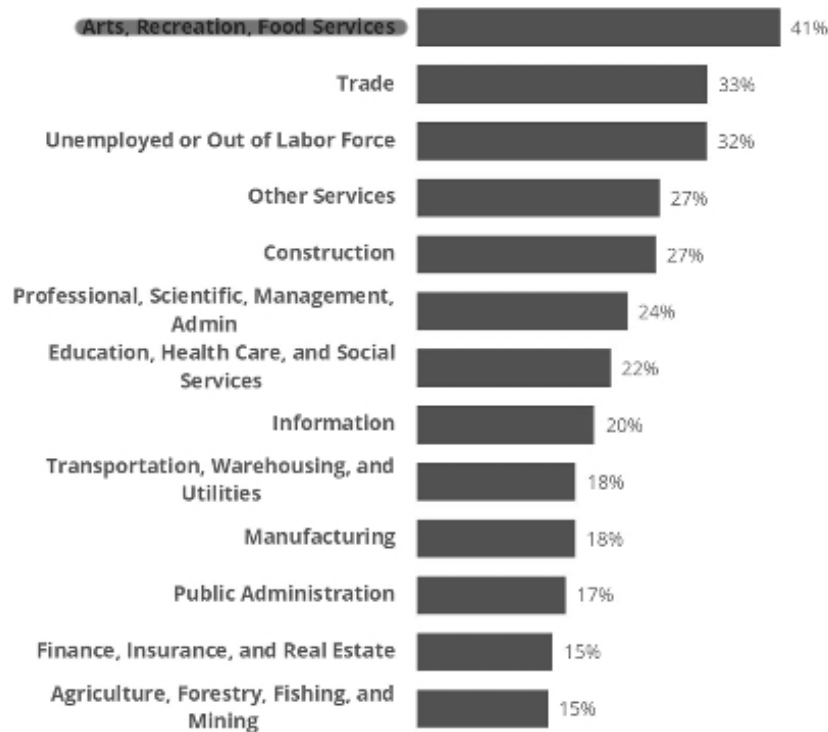
Industry	Average Annual Earnings	Max Affordable Rent	Can Afford Median Rent?	Max Affordable Home Price	Can Afford Median Home Price?	Can Afford Median Home Price with 1.5 Earners per Household?
Goods Producing	\$76,371	\$1,909	yes	\$263,445	no	yes
Natural resources and mining	\$91,516	\$2,288	yes	\$315,690	no	yes
Construction	\$62,282	\$1,557	yes	\$214,845	no	yes
Manufacturing	\$78,050	\$1,951	yes	\$269,238	no	yes
Service Providing	\$51,781	\$1,295	yes	\$178,621	no	no
Trade, transportation, and utilities	\$49,875	\$1,247	yes	\$172,047	no	no
Information	\$64,143	\$1,604	yes	\$221,266	no	yes
Financial activities	\$78,638	\$1,966	yes	\$271,265	no	yes
Professional and business services	\$73,536	\$1,838	yes	\$253,666	no	yes
Education and health services	\$53,857	\$1,346	yes	\$185,783	no	no
Leisure and hospitality	\$27,784	\$695	no	\$95,844	no	no
Other services	\$44,988	\$1,125	yes	\$155,190	no	no
Public administration	\$57,405	\$1,435	yes	\$198,021	no	no

Note: Median rent, 2022 1-year statewide estimate of \$895 and Median Home Value (Zillow) of \$318,848 were used.

Source: Quarterly Census of Employment and Wages, 2022 ACS 1-year estimates, and Zillow Home Value Index.

Figure I-30 shows rates of cost burden by employment industry of the household head. Rates of cost burden are the highest among those employed in hospitality industries including the arts, entertainment, and recreation industry and the accommodation and food services (41%) and workers in the Trade industry (33%). These workers have a rate of cost burden that is higher than among the unemployed or out of the labor force (32%),

**Figure I-30.**  
**Cost Burden by Head of Household Employment Industry, Wyoming, 2021**



Note: Households' industry is determined by the industry of the household head.

Source: ACS 2021 5-year PUMS estimates and Root Policy Research.

The state is projected to add around 47,000 jobs between 2020 and 2030, and about 20% of those are expected to be in essential occupations. Figure I-31 shows the projected growth in essential occupations and the 2022 median annual wage.

**Figure I-31.**  
**Projected Growth in Essential Occupations and 2022 Median Annual Wage,**  
**Wyoming**

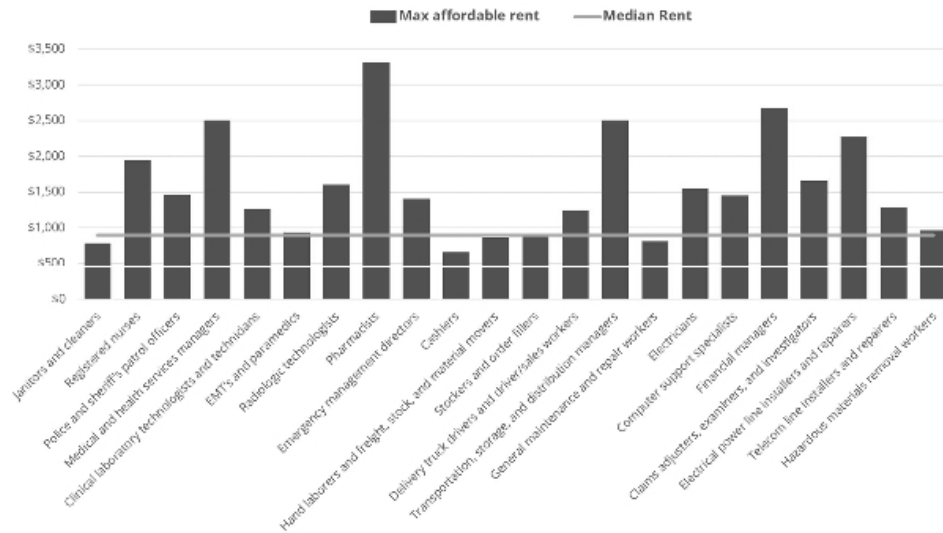
	Projected growth 2020-2030	2022 Median Annual Wage
<b>Selected occupations that provide public health and safety</b>		
Janitors and cleaners	572	\$31,280
Registered nurses	541	\$77,730
Police and sheriff's patrol officers	82	\$58,370
Medical and health services managers	298	\$100,230
Clinical laboratory technologists and technicians	57	\$50,380
EMT's and paramedics	45	\$37,410
Radiologic technologists	39	\$64,270
Pharmacists	66	\$132,600
Emergency management directors	2	\$56,160
<b>Selected occupations that provide essential products</b>		
Cashiers	134	\$26,240
Hand laborers and freight, stock, and material movers	357	\$34,720
Stockers and order fillers	1,425	\$36,290
Delivery truck drivers and driver/sales workers	1,988	\$49,760
Transportation, storage, and distribution managers	25	\$100,300
<b>Selected occupations that provide other infrastructure support</b>		
General maintenance and repair workers	1,561	\$32,620
Electricians	1,322	\$62,010
Computer support specialists	70	\$57,990
Financial managers	209	\$107,240
Claims adjusters, examiners, and investigators	3	\$66,210
Electrical power line installers and repairers	87	\$90,960
Telecommunications line installers and repairers	50	\$51,430
Hazardous materials removal workers	5	\$38,490

Source: BLS and Wyoming Dept of Workforce Services.

Housing that accommodates a broad range of incomes is needed to accommodate essential workers. Figures I-32 and I-33 show rental and ownership affordability for essential workers. Many essential occupations can barely afford the median rent and the vast majority cannot afford the median home price.

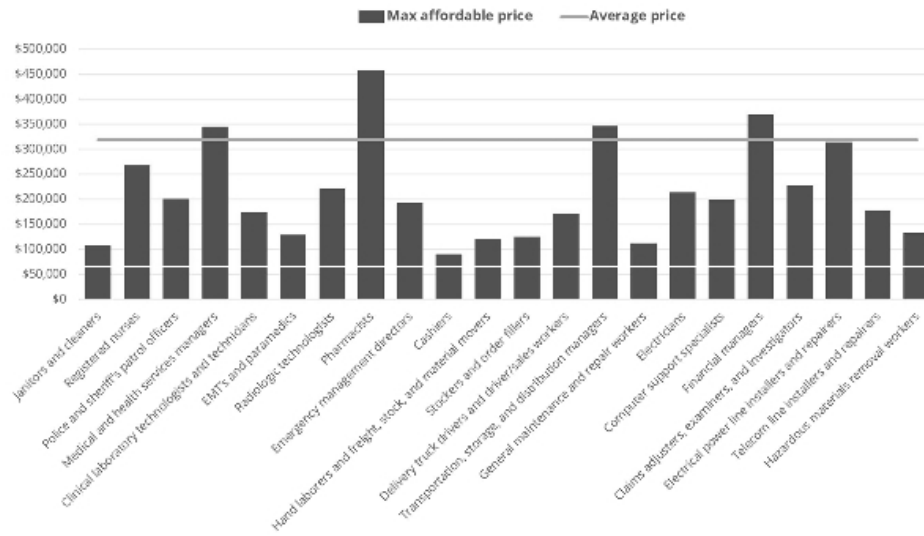


**Figure I-32.**  
**Rent Affordability for Essential Workers, Wyoming, 2022**



Note: Median rent 2022 1-year statewide estimate of \$895 was used.  
Source: BLS, Wyoming Dept of Workforce Services, and ACS 2022 1-year estimates.

**Figure I-33.**  
**Purchase Price Affordability for Essential Workers, 2022, Wyoming**

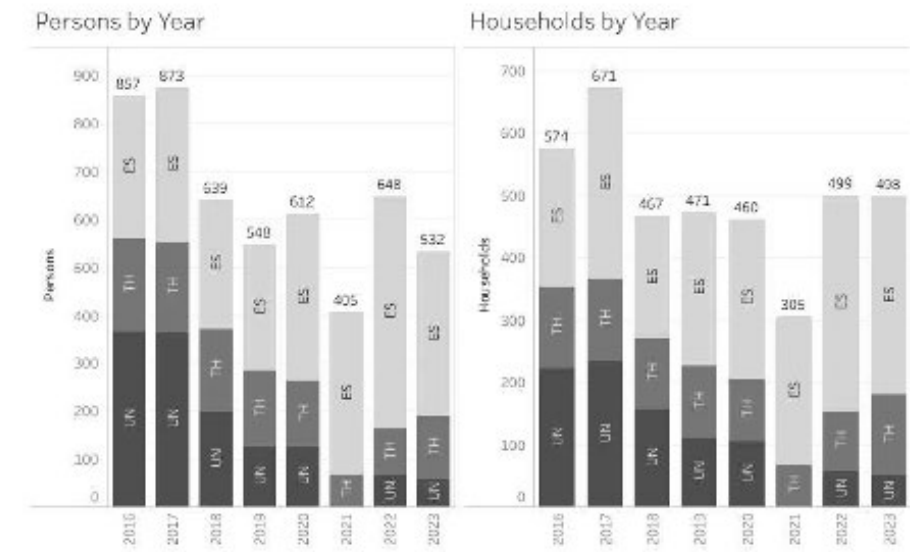


Note: Median Home Value (Zillow) of \$318,848 was used.  
Source: BLS, Wyoming Dept of Workforce Services, and Zillow Home Value Index.

Housing Needs and Housing Diversity

**Homelessness.** Figure I-34 shows data according to the Point-In-Time<sup>4</sup> (PIT) reports produced by the Wyoming Homeless Collaborative. According to these data, the number of persons experiencing homelessness per year has decreased compared to the levels in 2016 and 2017. The 2023 PIT counted 498 households made up of 532 individuals experiencing homelessness; the largest share was in emergency shelters (ES), followed by transitional housing (TH), and the smallest share was unsheltered (UN), which are individuals staying on the streets, encampments, in their car, or other places not intended as housing.

Figure I-34.  
Point In Time Homeless Counts, Wyoming, 2016-2023



Note: Due to the COVID-19 pandemic, the unsheltered portion of the 2021 count was excluded, leading to an undercount of the homeless population.  
Source: Institute for Community Alliance: <https://icalliances.org/wy-pit-dashboard>

Although the PIT provides a snapshot of homelessness on a single night, it excludes residents who are precariously housed, couch surfing, or were simply not identified on the

<sup>4</sup> The Point-In-Time (PIT) count is a nationwide count of individuals and families experiencing homelessness within a community on a given night, typically at the end of January, as outlined and defined by the U.S. Housing and Urban Development Department (HUD).

night of the PIT. As such, it is considered an underrepresentation of homelessness in a community.

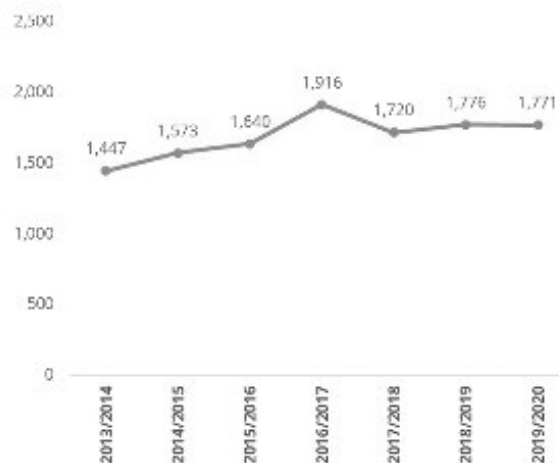
School districts, through the McKinney Vento Act provide an additional data point for measuring homelessness, with a focus on children and youth experiencing homelessness. Under the McKinney Vento Act, the term “homeless children and youths” is defined as individuals who lack a fixed, regular, and adequate nighttime residence.<sup>5</sup>

Figure I-35 shows trends in McKinney Vento counts for Wyoming public schools. The most recent data available for the academic year 2019-2020 indicates a total of 1,771 children and youth experiencing homelessness. This is an increase of 324 from the 1,447 reported in the 2013/2014 academic year. However, it is a decrease from the peak of 1,916 reported in the 2016/2017 academic year.

**Figure I-35.**  
**McKinney Vento**  
**Homeless Children**  
**and Youth Count,**  
**Wyoming,**  
**2013/2014-2019/2020**

Note:  
Dates follow the academic calendar.

Source:  
U.S. Department of Education, and  
Root Policy Research.



**Cost burden, overcrowding, and substandard housing.** Figure I-36 shows the rates of cost burden among different household types. As shown, single parent households (41%) and households with a member with a disability (36%) experienced significantly higher rates of cost burden.

<sup>5</sup> This includes children and youths who are sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason; are living in motels, hotels, trailer parks, or camping grounds due to the lack of alternative adequate accommodations; are living in emergency or transitional shelters; or are abandoned in hospitals; children and youths who have a primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings; children and youths who are living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations, or similar settings; and migratory children who qualify as homeless under the previous definitions.

**Figure I-36.**  
**Cost Burden by Household Type, Wyoming, 2021**

Source:  
PUMS estimates derived from 2021 5-year ACS, and  
Root Policy Research.

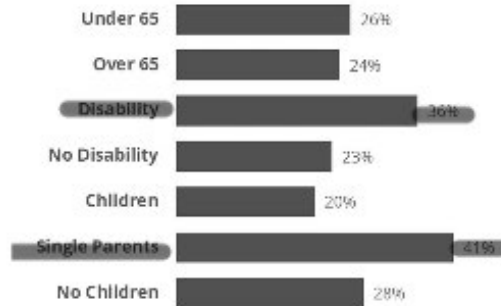


Figure I-37 shows rates of overcrowding and substandard housing for different household types. Housing units are considered overcrowded when they are occupied by more than one person per room. Substandard units are those that lack complete kitchen and plumbing facilities.<sup>6</sup> Overcrowding and substandard housing pose threats to public health and safety, strain public infrastructure, and highlight the need for affordable housing. Overcrowding rates are highest among those with children (3.4%) and rates of substandard housing are the highest among those with a disability (2.2%).

**Figure I-37.**  
**Overcrowding and Substandard Units by Household Type, Wyoming, 2021**

Source:  
PUMS estimates derived from 2021  
5-year ACS, and Root Policy  
Research.

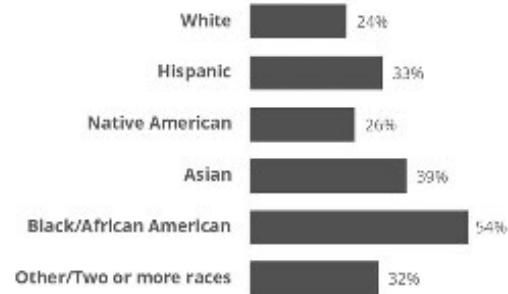
	Overcrowded	Substandard Housing
Under 65	1.7%	0.7%
Over 65	0.3%	1.7%
Disability	1.3%	2.2%
No Disability	1.3%	0.7%
Children	3.4%	0.3%
Single Parents	2.4%	0.3%
No Children	0.3%	1.3%

Figures I-38 and I-39 show rates of cost burden, overcrowding, and substandard housing by race/ethnicity. Black/African American households have the highest rate of cost burden (54%), Asian households have the highest rate of overcrowding (4.6%), and Native American households have the highest rate of substandard housing (4.6%).

<sup>6</sup> Including lack of sink, stove, shower, and hot water.

**Figure I-38.  
Cost Burden by  
Race/Ethnicity,  
Wyoming, 2021**

Source:  
PUMS estimates derived from 2021  
5-year ACS, and Root Policy  
Research.



**Figure I-39.  
Overcrowding and Substandard  
Units by Race/Ethnicity,  
Wyoming, 2021**

Source:  
PUMS estimates derived from 2021 5-year ACS, and Root  
Policy Research.

	Overcrowded	Substandard Housing
White	1.0%	0.9%
Hispanic	3.8%	1.2%
Native American	3.0%	4.6%
Asian	4.6%	1.9%
Black/African American	3.6%	0.0%
Other/Two or more races	0.6%	0.3%

**Housing needs by county.** Comprehensive Housing Affordability Data (CHAS data) published by HUD are the only source of unduplicated counts of households experiencing housing needs at the county level. These data are special tabulations of ACS data and are released with a lag. The following table shows the number of households experiencing one or more housing problems—cost burden, overcrowding, lack of complete kitchen facilities, or lack of complete plumbing facilities— by tenure and AMI.

As shown, the state has over 50,000 households under 100% AMI with at least one housing problem. Of those, over 20,000 have income at or below 30% AMI.

Figure I-40.

Number of Households with a Housing Problem by County, 2020

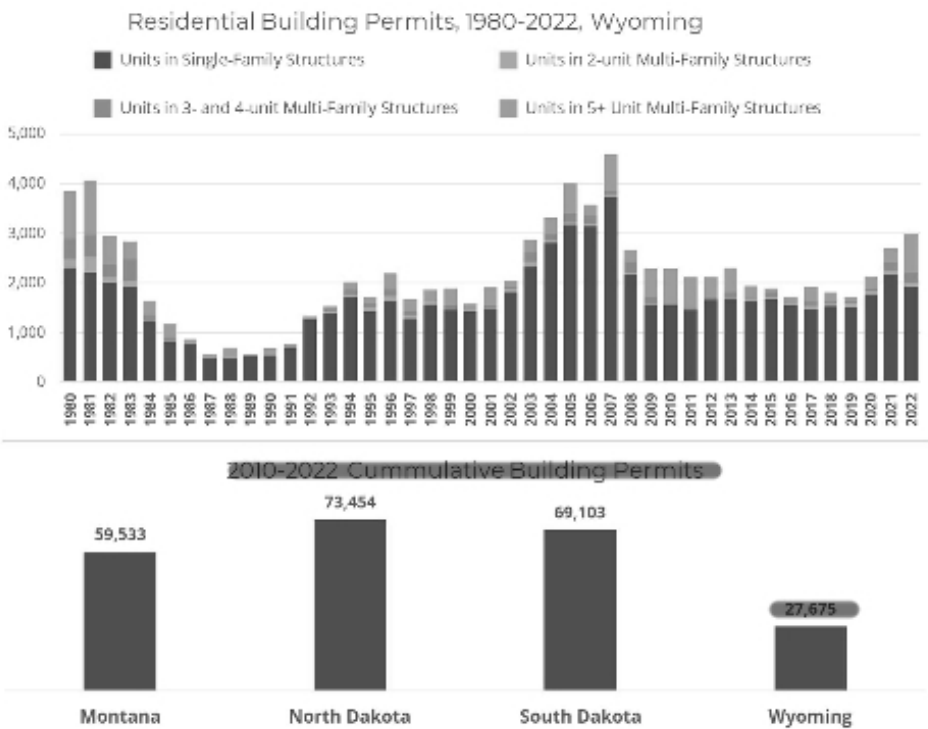
	0%-30% AMI		31%-50% AMI		51%-80% AMI		81%-100% AMI		100% + AMI		Total under 100% AMI
	Renters	Owners	Renters	Owners	Renters	Owners	Renters	Owners	Renters	Owners	
Wyoming	11,310	9,010	8,285	5,625	3,810	8,195	860	3,425	1,000	4,375	50,520
Albany	2,360	355	1,205	200	780	390	10	175	115	305	5,475
Big Horn	110	170	60	130	25	135	40	45	0	55	715
Campbell	800	1,205	595	375	120	365	35	210	55	340	3,705
Carbon	190	260	155	240	70	130	20	40	30	60	1,105
Converse	120	125	115	105	4	280	0	70	30	105	819
Crook	65	150	35	30	0	115	0	40	0	20	435
Fremont	615	645	440	330	350	835	45	250	45	235	3,510
Goshen	270	260	105	150	25	225	0	45	10	65	1,080
Hot Springs	130	80	35	105	0	60	0	4	0	4	414
Johnson	130	180	105	30	30	100	10	90	20	50	675
Laramie	1,795	1,580	1,515	1,330	920	1,345	165	590	135	855	9,240
Lincoln	100	170	175	200	80	350	4	190	80	280	1,269
Natrona	1,820	1,200	1,370	700	590	1,465	200	565	120	525	7,910
Niobrara	60	75	10	25	0	40	0	4	0	0	214
Park	310	360	255	435	125	465	60	165	90	225	2,175
Platte	125	145	195	70	25	55	0	15	0	110	630
Sheridan	770	420	490	225	95	950	105	275	40	335	3,330
Sublette	90	135	25	80	40	4	0	100	0	65	474
Sweetwater	725	720	370	375	150	300	0	140	4	140	2,780
Teton	345	255	715	145	320	320	160	180	210	405	2,440
Uinta	125	225	185	185	30	180	0	100	20	85	1,030
Washakie	105	110	100	100	25	70	0	50	0	45	560
Weston	150	190	25	60	0	35	4	80	0	60	544

Source: HUD CHAS 2020 estimates, and Root Policy Research.

**Housing type.** As shown in Figure I-41, residential building permits in Wyoming have been largely dominated by units in single-family structures. Around 78% of units permitted in the state since 1980 are units in single-family structures and around 15% are units in multifamily structures of 5 units or more. Units in 2-unit structures account for 3% of units permitted, and units in 3- and 4-unit structures account for 5% of units permitted.

The state saw high volumes of building permits issued in the early 1980s, before dropping with the 1980s recession. Building permitting gradually climbed to a peak in 2007 before dropping alongside the 2008 recession. This drop was significant and expanded with the economic slowdown in the energy markets. Permits have been rising since 2020 but have not reached pre-2008 recession levels. Additionally, compared to other surrounding states, Wyoming has permitted a much lower number of units since 2010.

**Figure I-41.**  
**Residential Building Permits Trends**



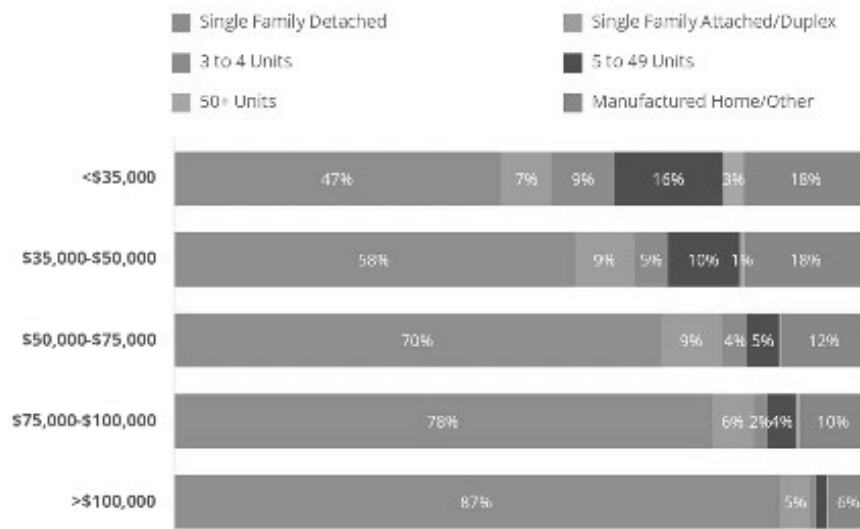
Source: US Census Building Permits Survey and Root Policy Research.



Household housing needs and preferences are subject to change over time due to shifts in household composition, income, employment, and age. While it is often easier to achieve diversity in housing type in rapidly growing urban areas, where density, volume building, and financial resources are larger, it is important to have a diversity of housing types in all areas to cater to the needs and preferences of households.

Figure I-42 shows the distribution of occupied housing types by income category for the state. Households with lower incomes occupy a mix of different housing types, while higher income households overwhelmingly occupy single family detached units.

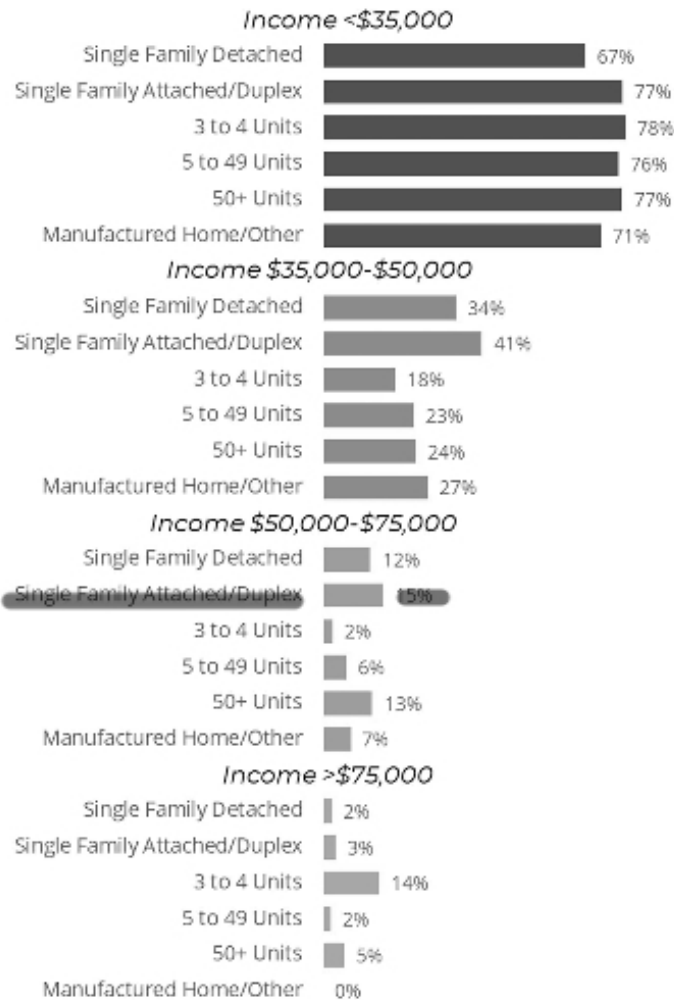
**Figure I-42.**  
**Housing Type Occupied by Income, Wyoming, 2021**



Source: PUMS estimates derived from 2021 5-year ACS, and Root Policy Research.

**Housing types and cost burden.** Figure I-43 shows rates of cost burden by household income and housing type. While lower income renter households have high rates of cost burden regardless of the housing type they occupy, they are less likely to be cost burdened if they occupy single family detached units and manufactured/mobile homes. Renter households with incomes between \$35,000 and \$50,000 are the least likely to be cost burdened if they occupy units in buildings with 3 to 4 units in structure. Renter households with incomes between \$50,000 and \$75,000 are also the least likely to be cost burdened if they occupy units in buildings with 3 to 4 units in structure.

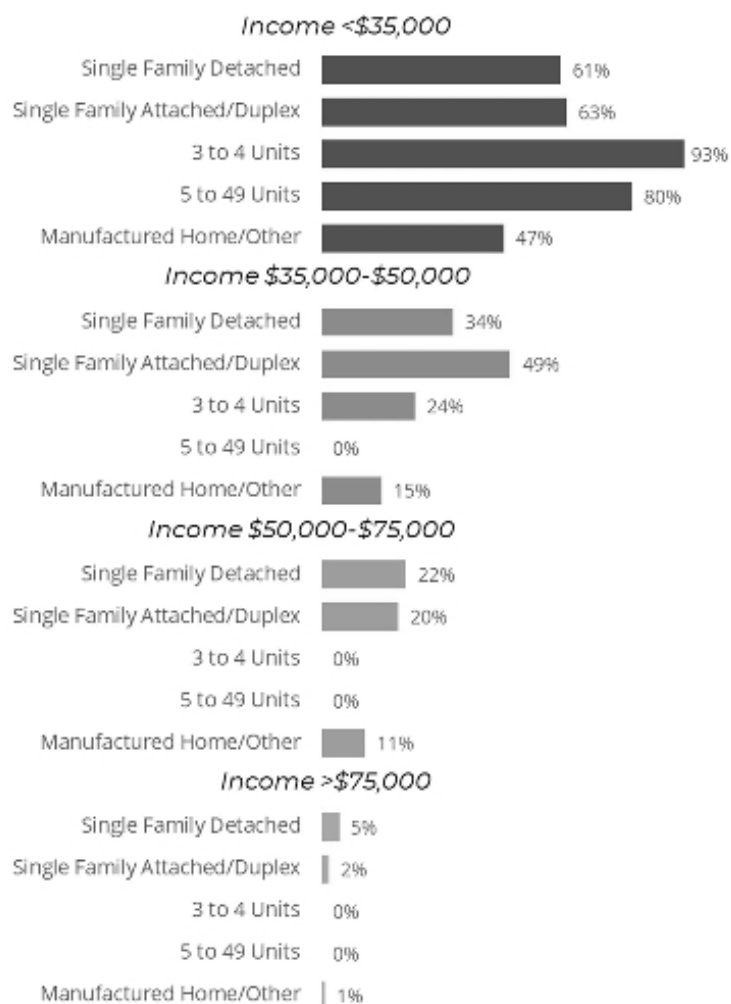
**Figure I-43.**  
**Percent of Renters that are Cost Burdened, by Income and Housing Type,**  
**Wyoming, 2021**



Source: PUMS estimates derived from 2021 5-year ACS, and Root Policy Research.

Among owners, cost burden tends to be lower across all income categories for those occupying manufactured/mobile homes.

**Figure I-44.**  
**Percent of Owners that are Cost Burdened, by Income and Housing Type,**  
**Wyoming, 2021**



Source: PUMS estimates derived from 2021 5-year ACS, and Root Policy Research.

## Housing Supply Constraints

A recent study by the Harvard Growth Lab titled "Housing in Wyoming: Constraints and Solutions"<sup>7</sup> found that the supply of new housing in Wyoming is not as responsive to price changes as in other US counties. This lack of housing discourages population growth and makes it difficult for businesses to find workers. According to the study, main causes for the lack of housing include excessive regulations concerning housing density and insufficient investment in infrastructure. For example, minimum lot sizes are too large, and there are too many regulations about the types of housing that can be built and how high they can be. There is also not enough investment in infrastructure like water systems. The study recommends that the state of Wyoming deregulate some of these restrictions and invest in infrastructure to support housing development. This would not only assist in solving the housing problem but also protect open spaces outside of cities.

Specific state level recommended actions for regulatory and infrastructure problems include:

- **Remove Protest Petition laws.** Wyoming's protest petition laws allow a small percentage of residents within a few hundred feet of a proposed zoning change to block it. This is a significant barrier to housing development in the state. Several states with similar laws have removed them altogether.
- **Revisit extraterritorial jurisdiction for Wyoming cities in a way that allows city expansion and democratic representation.** Wyoming cities used to have jurisdiction beyond their boundaries for growth, which was later repealed due to concerns about overreach and lack of representation. This hinders their ability to grow and makes development contentious.
- **Increase public input earlier in the planning process by inviting more commentary during the design of growth plans and zoning laws.** This can replace multiple public hearings later in the approval process for individual housing projects, which cause bureaucratic delays, high costs, and low efficiency. Multiple public hearings for individual housing projects tend to encourage responses from individuals who are only concerned about specific projects, rather than the public as a whole.
- **Incentivize local governments to deregulate housing density restrictions.** Wyoming strict regulations on housing density are creating blockages in the housing market throughout many parts of the state. To combat this, the state government could incentivize local governments to remove regulatory barriers related to minimum lot sizes, building heights, minimum parking spaces, and more. This could be done by creating a template of deregulated zoning laws and providing fiscal support for

<sup>7</sup> <https://growthlab.hks.harvard.edu/sites/projects.iq.harvard.edu/files/growthlab/files/2023-04-cid-wp-435-wyoming-housing-note.pdf>

infrastructure cost upgrades associated with the increase in density in participating communities. These changes would allow market forces to work more freely in Wyoming's housing development and protect open spaces.

- **Facilitate and expand local access to infrastructure funds.** Inadequate water and sewage infrastructure constrains housing development in Wyoming. The creation of a state fund could improve local access to grants for water infrastructure upgrades, which are often not approved. Different state-level fund designs can be considered to support local funds and provide flexibility to respond to local needs.
- **Provide technical support for local governments to identify housing infrastructure gaps.** State-funded technical teams can help local governments identify housing infrastructure gaps and plan solutions, which can address backlogs in long-term infrastructure planning and align regional strategies.

Specific local level recommended actions for regulatory and infrastructure problems include:

- **Local decision-makers should review and deregulate housing density restrictions to address local issues.** Existing local regulations on zoning and restrictions related to lot size, housing type, parking regulations, floor area ratios should be evaluated. Public outreach is necessary to make clear the costs of maintaining these restrictions, such as lesser choice, higher costs, and lost opportunities for future growth and jobs.
- **Cities and regions should create financial tools to subsidize infrastructure costs for housing development.** One approach that is being used in some Wyoming communities is **developing a trust fund**. This can be capitalized through land sales or returns on property holdings. The fund can then subsidize or cover infrastructure costs and take an equity stake in its investments, such as an arterial road that increases property values. The fund can also partner in mixed-use projects and recycle returns into the fund.
- **Local governments should purchase manufactured housing to meet local housing needs and supply affordable low income housing.** This is most relevant for the most rural parts of the state, where the cost of housing construction on site can be prohibitively high.

A scan of recommendations regarding zoning, land use, and infrastructure from housing needs assessments and strategies across communities in Wyoming reveals that many of the recommendations just presented are in line with previous strategies recommended for Wyoming communities. Following is a summary of such recommendations.

The 2013 Natrona County Land Use and Budget Report<sup>8</sup> advised the County to work in collaboration with the cities and towns to plan land use and development and create incentives for the annexation of subdivisions that are appropriate or for the development of subdivisions that have the potential for annexation in the future. It also recommends creating incentives for development closer to cities/towns, e.g., impact fees to cover the true cost of services and designating remote areas as limited service and infrastructure districts, as well as educating property owners and buyers about these limitations. Additionally, it recommends establishing a zoning ordinance that promotes urban infill and discourages suburban sprawl.

The 2023 Housing Needs Assessment and Strategic Policy Recommendations report for the City of Gillette<sup>9</sup> recommends developing a long-term financing plan for infrastructure expansion in or near existing subdivisions which will encourage economic development, exploring financing options for larger developments, and identifying unused public properties. The report recommends reducing lot sizes to increase residential densities, refining design standards, promoting Accessory Dwelling Units (ADUs), and offering local incentives for affordable housing development. The report also suggests building more manufactured housing near industrial parks to align workforce, wages, and housing needs.

The 2010 Park County Housing Assessment<sup>10</sup> analyses housing needs in the City of Cody, the City of Powell, the Town of Meeteetse, and the unincorporated area of Park County. The report recommended relaxing subdivision requirements and revising zoning ordinances to facilitate project approvals as well as preparing and sponsoring infrastructure grant requests for the construction of additional infrastructure. It also suggests introducing mixed residential and commercial zoning for the downtown area. This can generate additional income for landowners through small upstairs apartments and ground floor retail and serve as accommodation for commercial lessees or employees, keeping investments financially viable for landowners.

The 2015 City of Laramie Housing Study<sup>11</sup> recommended encouraging the development of mixed-income duplexes, triplexes, patios, and townhomes with standard amenities for low- to moderate-income elderly and workforce households. It also suggested creating mixed-income single-family homes, duplexes, and townhomes with complete accessibility design for moderate-income elderly households. Additionally, the study proposed increasing rental housing by developing accessory housing on undersized vacant lots. It also

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<sup>8</sup> <https://sonoraninstitute.org/files/pdf/leaping-the-budget-gap-land-use-a-fiscal-planning-in-natrona-county-wyoming-updated-05192013.pdf>

<sup>9</sup> <https://www.gillettewy.gov/home/showpublisheddocument/41969/638300419223070000>

<sup>10</sup> <https://www.codywy.gov/DocumentCenter/View/292/Final-Report-2010-Housing-Assessment-Park-County?bidId=>

<sup>11</sup> <https://www.cityoflaramie.org/DocumentCenter/View/8275/LARAMIE-WYOMING-HOUSING-STUDY---2030-COL?bidId=>

suggested creating mixed-income 1- and 2-bedroom owner/renter units in downtown areas, including rehabilitating upper-level commercial structures.

The 2023 Laramie Growth Area Plan<sup>12</sup> is a joint effort by Albany County and the City of Laramie to guide future decisions related to land use, housing, economic development, and service delivery. It emphasizes the provision of diverse and attainable housing and creating new commercial areas supported by housing at different densities. To implement the plan, zoning and subdivision regulations will be amended to align with the plan and promote the agreed-upon development pattern described in the Growth Plan Map. This will help in reducing rural residential sprawl and prepare the area for higher density and extension of city services.

According to the 2022 Affordable Housing Task Force Report<sup>13</sup>, the City of Cheyenne has acknowledged the need for policies and mechanisms to increase the supply of all types of housing in the area. The report mentions several recent policies and plans aimed at making housing more affordable, including the inclusion of Accessory Dwelling Units (ADUs) in residential zones and multi-family housing in business zones. Additionally, tap fee deferral and fee waiver programs are recommended for faster and greater development as well as the creation of a fee waiver program for affordable housing developments. The report also recommends eliminating certain zoning requirements such as density maximum, lot area minimums, height restrictions, and 20 foot set back requirements as well as lifting the requirements for more expensive building materials.

The 2023 Housing Study Commissioned by the Greater Cheyenne Chamber of Commerce<sup>14</sup> suggests making changes to allow for more multi-family housing by removing height restrictions, rezoning land, and changing parking restrictions. Additionally, the study suggests allowing for more single-family homes that are more densely built by changing the minimum lot size.

The 2022 Teton Region Housing Needs Assessment<sup>15</sup> presents housing needs in the bi-state, tri-county, multi-jurisdictional region composed of Teton County, Wyoming, Teton County, Idaho, and Northern Lincoln County, Wyoming. Recommended land use strategies for Teton County include exploring options that expand access to land opportunities for housing. Although the current policy of concentrating workforce development within the town of Jackson supports many community goals and priorities; concentrating workforce in Jackson is expensive due to limited land. It also suggests exempting deed-restricted

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<sup>12</sup> <https://www.cityoflaramie.org/1215/Laramie-Area-Growth-Plan>

<sup>13</sup> <https://cheyenneleads.org/wp-content/uploads/2023/05/Chamber-Housing-Study-2022.pdf>

<sup>14</sup> [https://www.cheyennechamber.org/\\_files/ugd/bc6a36\\_67678ceBad4544c5843e443d809e59f2.pdf](https://www.cheyennechamber.org/_files/ugd/bc6a36_67678ceBad4544c5843e443d809e59f2.pdf)

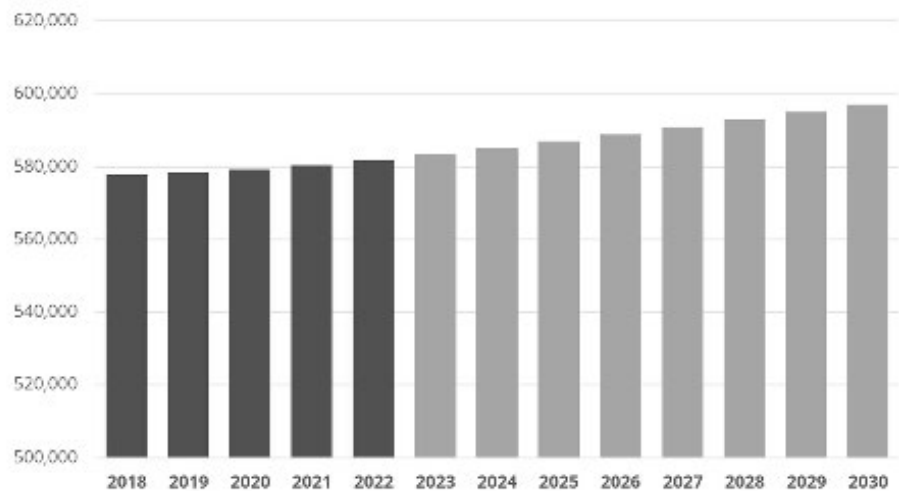
<sup>15</sup> <https://jhaffordablehousing.org/DocumentCenter/View/21911/2022-Teton-Region-Housing-Needs-Assessment>

housing from the growth cap and investing in opportunities to involve the private sector, including creating a revolving impact fund to reduce pre-development risk.

**Housing Needs Projections**

This section estimates the number of housing units needed to accommodate household growth through 2030, using population projections prepared by the Wyoming Economic Analysis Division. As shown in Figure I-45, the state is projected to experience moderate population growth in the coming years.<sup>16</sup>

**Figure I-45.**  
**Population Estimates and Projections, Wyoming, 2018-2030,**



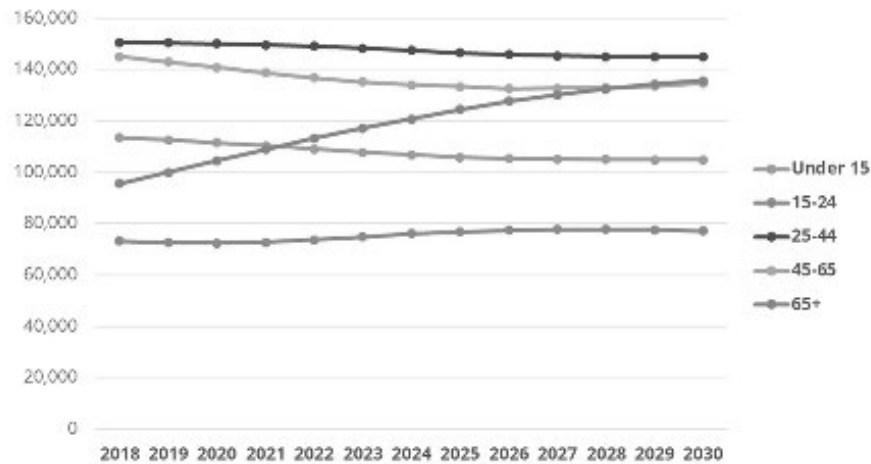
Source: Wyoming Economic Analysis Division and Root Policy Research.

Figure I-46 shows that growth is projected to be heavily concentrated among older adults. The share of the population 65 and over is projected to reach 23% by 2030. Older adults have higher rates of household formation. Therefore, growth in older adults accelerates housing demand.

<sup>16</sup> Projections were produced in 2019, which were still based on the 2010 census and may not reflect recent changes in population trends.



**Figure I-46.**  
**Population Estimates and Projections by Age, 2018-2030, Wyoming**



Source: Wyoming Economic Analysis Division and Root Policy Research.

Figure I-47 shows projected population and household change by county. Household change is estimated by applying 2021 household formation rates by age group to the population by age group forecasts. The aging of the population, leading to smaller households, means that the percent change in households will significantly outpace the percent growth in population.

**Figure I-47.**  
**Population and Household Change Projections by County**

	2021-2030 Population Change		2021-2030 Household Change	
	Number	Percent	Number	Percent
Wyoming	20,595	4%	17,790	8%
Albany	4,291	12%	2,303	14%
Big Horn	389	3%	336	8%
Campbell	-1,671	-4%	1,468	9%
Carbon	-425	-3%	-18	0%
Converse	510	4%	466	8%
Crook	922	13%	300	11%
Fremont	-21	0%	276	2%
Goshen	777	6%	345	7%
Hot Springs	-276	-6%	13	1%
Johnson	420	5%	390	10%
Laramie	8,589	9%	3,909	10%
Lincoln	2,093	11%	866	12%
Natrona	1,284	2%	1,888	6%
Niobrara	-232	-9%	-96	-9%
Park	1,234	4%	634	5%
Platte	339	4%	254	7%
Sheridan	1,729	6%	1,020	8%
Sublette	821	9%	706	21%
Sweetwater	-1,069	-3%	803	5%
Teton	1,968	8%	1,576	17%
Uinta	-803	-4%	338	4%
Washakie	-282	-4%	71	2%
Weston	8	0%	-57	-2%

Note: Household change is estimated by applying 2021 household formation rates by age group to the population by age group projections.

Source: Wyoming Economic Analysis Division, 2021 ACS 5-year estimates, and Root Policy Research.

As shown in the previous figure, the state needs to add close to 18,000 housing units to accommodate projected growth in households. In addition, the housing stock depreciates over time and needs to be replaced. Figure I-48 shows two estimates of the number of housing units the state needs to add to accommodate household growth and replace the loss in the housing stock. The first estimate assumes a housing loss of 0.24% every two

years, and the second estimate assumes a housing loss of 1.7% every two years.<sup>17</sup> Between 2021 and 2030, the state needs to add between 20,700 and 38,600 units, or an average of between 2,300 and 4,300 units per year.

**Figure I-48.**  
**Projected Housing Units**  
**Needed Between 2021 and**  
**2030, by County**

Source:

Wyoming Economic Analysis Division, 2021 ACS 5-year estimates, American Housing Survey, and Root Policy Research.

	Estimate 1	Estimate 2
Wyoming	20,741	38,584
Albany	2,504	3,721
Big Horn	394	745
Campbell	1,683	2,986
Carbon	71	611
Converse	538	972
Crook	340	580
Fremont	465	1,613
Goshen	409	795
Hot Springs	40	206
Johnson	440	742
Laramie	4,386	7,266
Lincoln	969	1,588
Natrona	2,287	4,700
Niobrara	-	8
Park	791	1,740
Platte	304	607
Sheridan	1,181	2,154
Sublette	763	1,107
Sweetwater	1,011	2,270
Teton	1,720	2,590
Uinta	434	1,013
Washakie	113	365
Weston	-	205

Figure I-49 shows the number of units needed by tenure and AMI, based on the state's AMI distribution provided by HUD's Comprehensive Housing Affordability Strategy (CHAS) most recent data. The estimates indicate that by 2030:

- Between 1,400 and 2,600 rental units will be needed to accommodate renter households with income at 30% AMI or below, and between 1,100 and 2,100

<sup>17</sup> According to the last Components of Inventory Change Report produced by HUD in 2017, which used American Housing Survey data, it was estimated that between 2015 and 2017, about 0.24% of the national housing stock was lost through demolitions or disasters alone. According to a Brookings Institute report, the two-year housing loss over the period 1985-2013 was 1.7% in the West region of the country (<https://www.brookings.edu/articles/unpacking-the-housing-shortage-puzzle/#:~:text=Churn%20is%20the%20sum%20of,built%20homes%20and%20no%20demolitions>).

ownership units will be needed to accommodate owner households with income at 30% AMI or below.

- Between almost 1,160 and 2,150 rental units will be needed to accommodate renter households with income between 31% and 50% AMI, and between 1,330 and 2,460 ownership units will be needed to accommodate owner households with income between 31% and 50% AMI.

Although some of these units will be available through filtering—the process by which a housing unit becomes more affordable with age—this requires an abundant housing supply to reach the necessary filtering rates. Additionally, for units affordable for households below 30% AMI, filtering is unlikely to provide adequate inventory since the required rent is usually lower than the operating costs, meaning there is no profit incentive for the market to provide such units.

**Figure I-49.**  
**Projected Housing Units Needed**  
**Between 2021 and 2030, by Tenure**  
**and AMI**

Note:  
Holds latest CHAS tenure and income distribution constant.

Source:  
HUD CHAS 2020 estimates, American Housing Survey, and Root Policy Research.

	Estimate 1	Estimate 2
<b>Renters</b>		
0%-30% AMI	1,437	2,659
31%-50% AMI	1,161	2,150
51%-80% AMI	1,350	2,500
81%-100% AMI	603	1,116
100% + AMI	1,499	2,775
<b>Owners</b>		
0%-30% AMI	1,143	2,116
31%-50% AMI	1,330	2,462
51%-80% AMI	2,420	4,480
81%-100% AMI	1,784	3,303
100% + AMI	8,116	15,025

Additionally, the state should aim to expand housing production and access to accommodate and encourage economic growth. A state economic outlook report produced by The University of Wyoming Center for Business and Economic Analysis<sup>18</sup> notes that housing affordability for workers is a binding constraint for growth, as housing supply continues to be outstripped by demand and the workforce necessary for new and expanding businesses struggles to find sufficient supply of affordable housing. According to the Job Openings and Labor Turnover report<sup>19</sup> the state had 19,000 job openings in October 2023. The job openings rate in Wyoming was 6.1% in October, higher than the

<sup>18</sup> [https://www.uwyo.edu/cbear\\_files/documents/wyeconomicoutlook.pdf](https://www.uwyo.edu/cbear_files/documents/wyeconomicoutlook.pdf)

<sup>19</sup> [https://www.bls.gov/regions/mountain-plains/news-release/jobopeningslaborturnover\\_wyoming.htm](https://www.bls.gov/regions/mountain-plains/news-release/jobopeningslaborturnover_wyoming.htm)

national rate of 5.3%. Additionally, the report notes that there were 2 job openings for every unemployed person in Wyoming, higher than the 1.4 job openings for every unemployed person at the national level. This indicates that the state's ability to accommodate workforce in-migration will be key to sustaining employment growth.

## SECTION II.

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### CENTRAL REGION

## SECTION II. Central Region

This regional summary provides demographic, economic, and housing market data for the Central Region. Wyoming's Central Region is comprised of Carbon county, Converse county, and Natrona county.

### Central Region



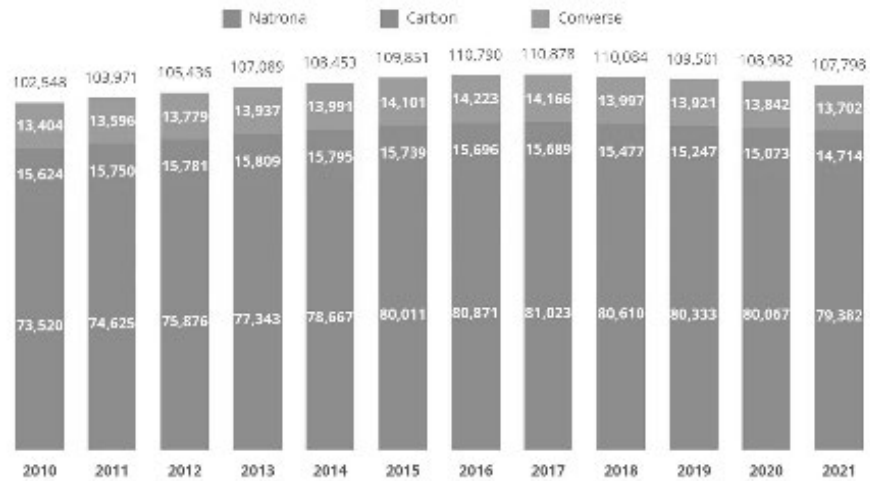
### Demographic Trends

**Population growth.** The population of Wyoming's Central Region grew by around 5.1% between 2010 and 2021, as the State of Wyoming's population grew by around 5.7%. As shown in Figure II-1, the Central Region's population grew each year from 2010 to 2017, increasing from 102,500 residents in 2010 to nearly 110,900 residents in 2017. The Region's population decreased each year beginning in 2018, reaching 107,800 residents in 2021. Similarly, the State of Wyoming's population grew each year from 2010 to 2017 and has modestly decreased since.

Nearly 75% of the Region's population resides in Natrona county, where Casper, the Region's urban center, is located. Carbon and Converse counties account for 14% and 13% of the Region's population, respectively. These population shares remained relatively stable

since 2010, with Natrona seeing a slight increase in its share of the Region's population and Carbon seeing a slight decrease.

**Figure II-1.**  
**Population, Central Region, 2010-2021**



Source: 2010-2021 5-year ACS and Root Policy Research.

Between 2010 and 2021, Natrona county experienced an overall population growth of 8%. However, starting in 2018, the county saw a yearly decrease in population. Between 2010 and 2021, Converse county experienced an overall population growth of 2%. Converse county saw an increase in population every year until 2016, after which it experienced negative growth until 2021. Carbon County had no significant population growth in the early 2010s, and starting in 2014, its population began to decrease every year. As a result, Carbon County's population declined by 4.8% between 2010 and 2021.

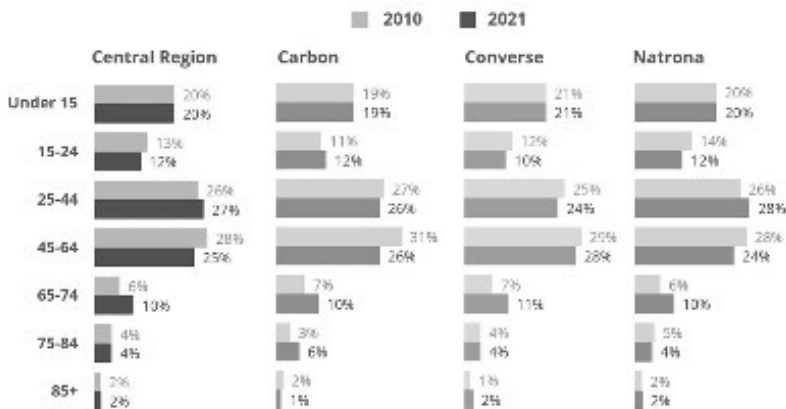
**Age distribution.** Figure II-2 shows the age distribution of residents in the Central Region and each of its counties for 2010 and 2021. Between 2010 and 2021, the Central Region's share of residents aged 65 and older increased by around four percentage points from 12% to 16%. This shift took place in each county in the Central Region and was most significant in Carbon county.

At the same time, the Region's share of residents aged 25-64 decreased slightly from 54% to 52%. Each county experienced this change, with the most dramatic reduction taking place in Carbon county where the share of residents aged 25-64 decreased from 58% to 51%. The Central Region's growing senior population underscores the importance of aging-



friendly housing options moving forward while the Region's shrinking share of working-aged individuals raises concerns about a shrinking workforce, especially in Carbon county.

**Figure II-2.**  
**Age Distribution, Central Region, 2010 and 2021**

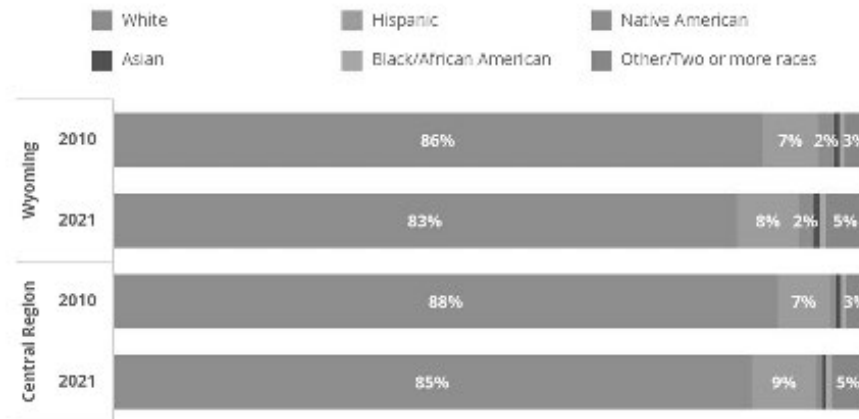


Source: 2010 and 2021 5-year ACS and Root Policy Research.

**Racial and ethnic distribution.** Figure II-3 shows the racial and ethnic distributions of the populations of Wyoming and Wyoming's Central Region. The Central Region's population closely resembles that of Wyoming in terms of race and ethnicity. The share of Central Region residents who identify as non-Hispanic White is two percentage points larger than that of Wyoming.

The Central Region's population has become slightly more racially and ethnically diverse since 2010. The share of non-Hispanic White residents has decreased by three percentage points, while the shares of the population identifying as Hispanic and other/two or more races increased by two percentage points each.

**Figure II-3.**  
**Race and Ethnicity, Wyoming and Central Region, 2010 and 2021**

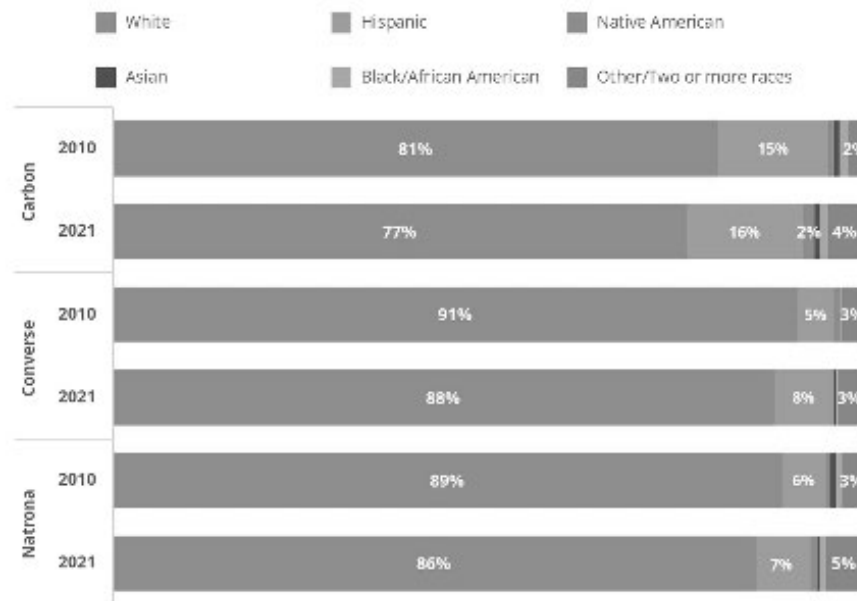


Note: The categories White, Native American, Asian, Black/African American, and Other/Two or more races include only non-Hispanic. The Hispanic category refers to Hispanics of any race. 0% and 1% labels are not shown.

Source: 2010 and 2021 5-year ACS and Root Policy Research.

Figure II-4 shows racial and ethnic distributions for each county within the Central Region in 2010 and 2021. Central Region counties have become more racially and ethnically diverse since 2010. Each county's shares of residents identifying as Hispanic increased between 2010 and 2022, while Carbon and Natrona counties saw their shares of residents identifying as Other/Two or more races increase by two percentage points. Carbon county has the largest share of Hispanic residents both in the Central Region and in the state of Wyoming at 16%.

**Figure II-4.**  
**Race and Ethnicity, Central Region, Counties 2010 and 2021**



Note: The categories White, Native American, Asian, Black/African American, and Other/Two or more races include only non-Hispanic. The Hispanic category refers to Hispanics of any race. 0% and 1% labels are not shown.

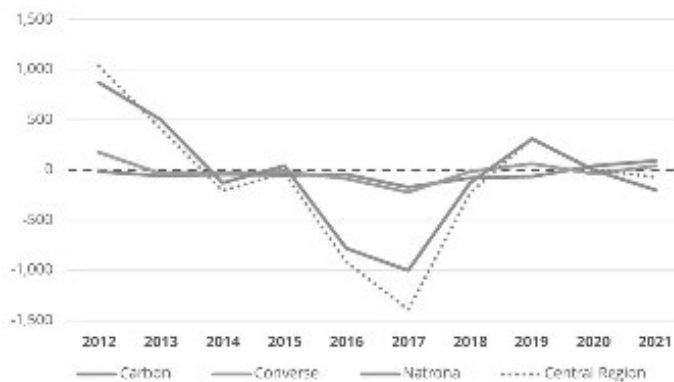
Source: 2010 and 2021 5-year ACS and Root Policy Research.

**Migration.** Figure II-5 shows net migration data based on year-to-year address changes reported on individual income tax returns filed with the IRS for each county in Wyoming's Central Region from 2012 to 2021. Net migration<sup>1</sup> in the Central Region was positive in 2012 and 2013 and negative each year from 2014 to 2018. The Region's negative net migration was greatest alongside the energy sector's contraction in 2016 and 2017. Net migration became positive in 2019 and 2020 and was negative in 2021.

<sup>1</sup> Net migration is the difference between inflows and outflows, where inflows represent the number of new households who filed a return in the county and filed a return in a different county the previous year and outflows are the number of households who filed a return in a county other than the specified county and had filed a return in the specified county the previous year.

**Figure II-5.  
Net Migration,  
Central Region,  
Counties, 2012-  
2021**

Source:  
Internal Revenue Service and  
Root Policy Research.

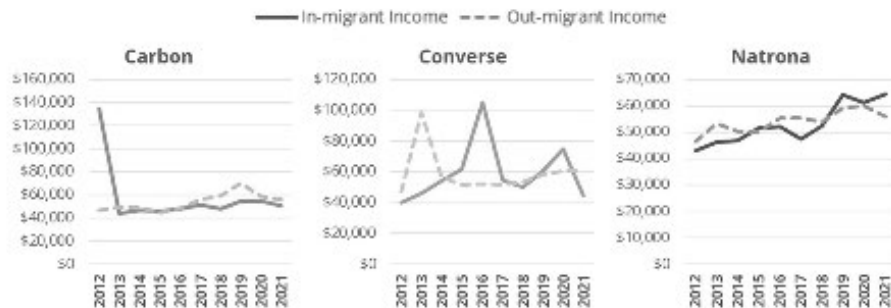


IRS data also provide the total adjusted gross income, which allows the estimation of the average adjusted gross income<sup>2</sup> for inflow and outflow returns each year. Figure II-6 shows the average income of in-migrants and the average income of out-migrants for each county in the Central Region from 2012 to 2021 to identify migration-driven trends in income. It should be noted that these are averages and can be skewed by a small number of very high income households in some of the years. Key trends are outlined here:

- In Carbon and Natrona counties, the average income of in-migrants is similar to the average income of out-migrants in most years studied. These counties are likely not experiencing migration-driven changes in income.
- In Converse county, during the energy sector contraction, the county's in-migrants had higher average incomes than its out-migrants and the county experienced negative net migration, suggesting lower-income residents left Converse county at higher rates than higher-income in-migrants moved to the county.

<sup>2</sup> Adjusted Gross Income (AGI) is defined as gross income minus adjustments to income. Gross income includes your wages, dividends, capital gains, business income, retirement distributions as well as other income. Adjustments to income include such items as Educator expenses, Student loan interest, Alimony payments or contributions to a retirement account.

**Figure II-6.**  
**Average Income of In-migrants and Out-migrants, Central Region,**  
**Counties 2012-2021**



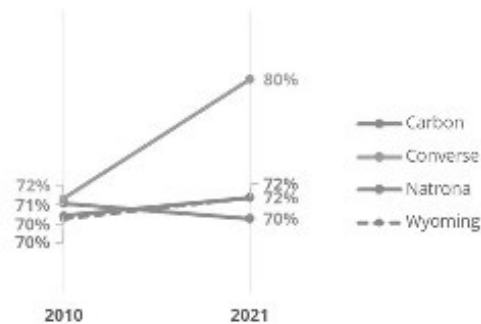
Source: Internal Revenue Service and Root Policy Research.

**Homeownership.** Homeownership rates for each county in the Central Region are shown in Figure II-7. As of 2021, Converse county is estimated to have the highest homeownership rate in the Region at 80% and is the only county in the region to have a higher homeownership rate than Wyoming. Natrona's homeownership is 72%, equal to that of Wyoming. Carbon county has the lowest homeownership rate in the Region at 70%.

Between 2010 and 2021, homeownership rates decreased in Carbon county by one percentage point and increased in Natrona county by two percentage points. While homeownership rates in Converse county appear to have increased by eight percentage points, these estimates had substantial margins of error for both years, 2010 and 2021. The substantial increase in homeownership in Converse county has several possible explanations. First, over the time studied, total employment remained constant in Natrona county and decreased by 8% in Carbon county. Unlike the other counties in the region, Converse county experienced a 13% increase in total employment over the time studied. Converse county also saw its Natural Resources & Mining industry, the only industry in the county for which median earners can afford a median priced home, grow by 18% over the time studied.

**Figure II-7.  
Homeownership Rates,  
Central Region, Counties 2010  
and 2021**

Source:  
2010 and 2021 5-year ACS and Root Policy Research.



**Income and poverty.** Figure II-8 shows median income for homeowners and renters in each county in Wyoming's Central Region. Key trends in median income by tenure include:

- In 2021, median renter income in the Central Region is about 40-50% of median owner income. Median renter income remained stable as a share of owner income since 2010 in Natrona county and decreased as a share of owner income in Carbon and Converse counties.
- Between 2010 and 2021, median income increased for both owners and renters in Natrona and Converse counties. Owner income increased by similar percentages over the time studied in these counties as it did in Wyoming. Renters in Natrona county saw a larger percentage growth in income than renters in Wyoming did, while renters in Converse county saw a smaller percentage growth in income than renters in Wyoming.
- In Carbon county, median income increased for homeowners and decreased by over 25% for renters over the time studied.

**Figure II-8.**  
**Median Income by Tenure,**  
**Central Region, Counties,**  
**2010 and 2021**

Source:  
 2010 and 2021 5-year ACS and Root Policy  
 Research.

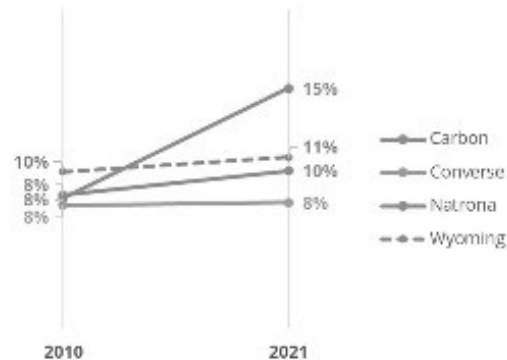
	Median Income		2010-2021 Change	
	2010	2021	Amount	Percent
<b>Carbon</b>				
Owner	\$64,679	\$76,420	\$11,741	18%
Renter	\$47,844	\$35,577	-\$12,267	-26%
<b>Converse</b>				
Owner	\$65,203	\$85,486	\$20,283	31%
Renter	\$30,302	\$32,171	\$1,869	6%
<b>Natrona</b>				
Owner	\$63,449	\$80,147	\$16,698	26%
Renter	\$30,123	\$37,506	\$7,383	25%
<b>Wyoming</b>				
Owner	\$64,489	\$81,875	\$17,386	27%
Renter	\$33,550	\$39,506	\$5,956	18%

Poverty rates for each county in Wyoming's Central Region are presented in Figure II-9. In 2021, Converse county had the Region's lowest poverty rate at 8%. Converse and Natrona counties had poverty rates below Wyoming's 11% poverty rate. Carbon county had the highest poverty rate in the Region at 15%.

Between 2010 and 2021, poverty rates increased by around seven percentage points in Carbon county and by two percentage points in Natrona county. Converse county's poverty rate remained the same between 2010 and 2021.

**Figure II-9.**  
**Poverty Rate, Central Region,**  
**Counties, 2010 and 2021**

Source:  
 2010 and 2021 5-year ACS and Root Policy Research.

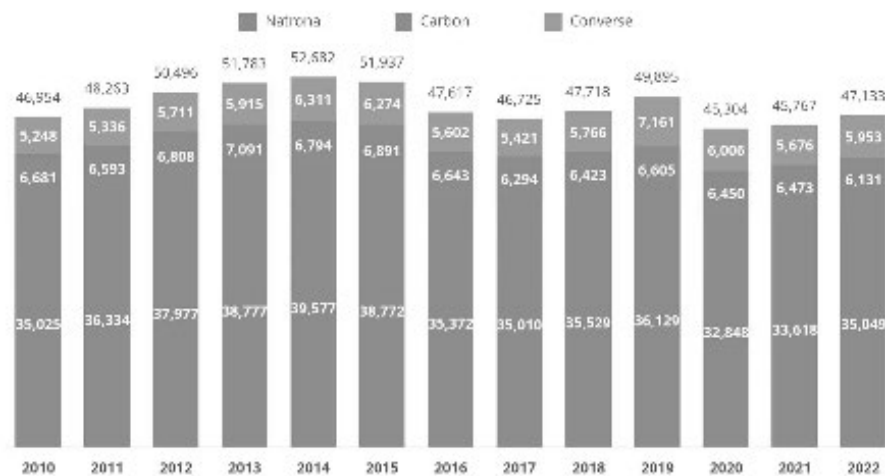


## Economic Trends

**Employment.** As shown in Figure II-10 below, total employment in the Central Region increased from 46,954 jobs in 2010 to 47,133 jobs in 2021, a slight increase of less than 1%. Employment growth is a driver of net migration trends, contributing to the region's negative net migration. Total employment in Converse county and Natrona county increased by 705 and 24 jobs respectively between 2010 and 2022 as Carbon county's total employment decreased by 550 jobs. In 2021, the Central Region's counties' shares of regional employment match their shares of the regional population almost exactly.

Total employment in the Region increased each year from 2010 until peaking at nearly 52,700 jobs in 2014. Total employment decreased during the energy sector's contraction from 2015 to 2017, then grew from 2018 until the pandemic prompted a loss of almost 4,600 jobs between 2019 and 2020. The Region's employment has gradually increased since 2020, but as of 2022, it has not recovered to pre-pandemic levels.

**Figure II-10.**  
**Total Employment by County, Central Region, Counties, 2010 to 2022**



Source: Quarterly Census of Employment and Wages and Root Policy Research.

The three largest industries in the Central Region by employment are Trade, Transportation, & Utilities (23% of total jobs), Education & Health Services (18% of total jobs), and Leisure & Hospitality (14% of total jobs). The Central Region is becoming more service-oriented; it saw a nearly 1,000-job increase in service providing jobs and an 800-job decrease in goods producing jobs.



Figures II-11 to II-13 provide a detailed overview of employment within each county of Wyoming's Central Region. Figures are presented in the order of highest to lowest total employment.

As shown in Figure II-11, total employment in Natrona county grew by less than 1% between 2010 and 2022. In both 2010 and 2022, Natrona county's three leading industries by employment are Trade, Transportation, & Utilities (8,779 jobs), Education & Health Services (6,088 jobs), and Leisure & Hospitality (4,805 jobs). Employment within the Leisure & Hospitality industry experienced the largest growth in employment (+835 jobs), followed by Trade, Transportation, & Utilities (+426 jobs). Natural Resources & Mining experienced the greatest job loss between 2010 and 2022 at -1,285 jobs (-39% of its 2010 employment).

**Figure II-11.**  
**Employment by Industry, Natrona County, 2010 and 2022**

Natrona County	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
<b>Goods Producing</b>	<b>7,522</b>	<b>6,647</b>	<b>-875</b>	<b>-12%</b>
Natural Resources & Mining	3,298	2,013	-1,285	-39%
Construction	2,623	2,873	250	10%
Manufacturing	1,601	1,761	160	10%
<b>Service Providing</b>	<b>27,503</b>	<b>28,402</b>	<b>899</b>	<b>3%</b>
Trade, Transportation, & Utilities	8,353	8,779	426	5%
Information	490	339	-151	-31%
Financial Activities	1,910	1,995	85	4%
Professional & Business Services	2,855	2,867	12	0%
Education & Health Services	5,761	6,088	327	6%
Leisure & Hospitality	3,970	4,805	835	21%
Other Services	1,701	1,373	-328	-19%
Public Administration	2,463	2,156	-307	-12%
<b>All Industries</b>	<b>35,025</b>	<b>35,049</b>	<b>24</b>	<b>0%</b>

Source: Quarterly Census of Employment and Wages and Root Policy Research.

Figure II-12 below shows employment in Carbon county. Total employment in the county decreased by 550 jobs, or 8%, between 2010 and 2022, driving the county's negative net migration across the time studied.

Carbon county's three largest sectors by employment are Leisure & Hospitality (1,324 jobs), Education & Health Services (1,185 jobs), and Trade, Transportation, & Utilities (1,036 jobs). Only two of the nine industries for which complete data are available added jobs over the

time studied. Leisure & Hospitality added 372 jobs while Professional & Business Services added 72 jobs. Public Administration experienced the greatest job loss since 2010 (-665 jobs).

**Figure II-12.**  
**Employment by Industry, Carbon County, 2010 and 2022**

Carbon County	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
<b>Goods Producing</b>	<b>1,477</b>	<b>1,425</b>	<b>-52</b>	<b>-4%</b>
Natural Resources & Mining	N/A	300	N/A	N/A
Construction	550	361	-189	-34%
Manufacturing	N/A	764	N/A	N/A
<b>Service Providing</b>	<b>5,204</b>	<b>4,706</b>	<b>-498</b>	<b>-10%</b>
Trade, Transportation, & Utilities	1,110	1,036	-74	-7%
Information	82	50	-32	-39%
Financial Activities	228	185	-43	-19%
Professional & Business Services	237	309	72	30%
Education & Health Services	1,264	1,185	-79	-6%
Leisure & Hospitality	952	1,324	372	39%
Other Services	138	89	-49	-36%
Public Administration	1,193	528	-665	-56%
<b>All Industries</b>	<b>6,681</b>	<b>6,131</b>	<b>-550</b>	<b>-8%</b>

Note: Data are not available for categories marked "N/A". In accordance with BLS policy, data are reported under a promise of confidentiality and are published in a way so as to protect the identifiable information of reporters. BLS withholds the publication employment and wage data for any industry level when necessary to protect the identity of employers.

Source: Quarterly Census of Employment and Wages and Root Policy Research.

Figure II-13 below shows employment detail for Converse county. Across the time studied, total employment in the county increased by 13%, or 703 jobs. The Education & Health Services and Natural Resources & Mining industries have the highest employment in the county at around 1,360 jobs each. The Trade, Transportation, & Utilities industry has the third highest employment in the region at 1,114 jobs. Since 2010, the Trade, Transportation, & Utilities industry has added the most jobs (+234 jobs). Only three industries saw their employment decrease since 2010, and of these, Construction lost the most jobs (-169 jobs).

**Figure II-13.**  
**Employment by Industry, Converse County, 2010 and 2022**

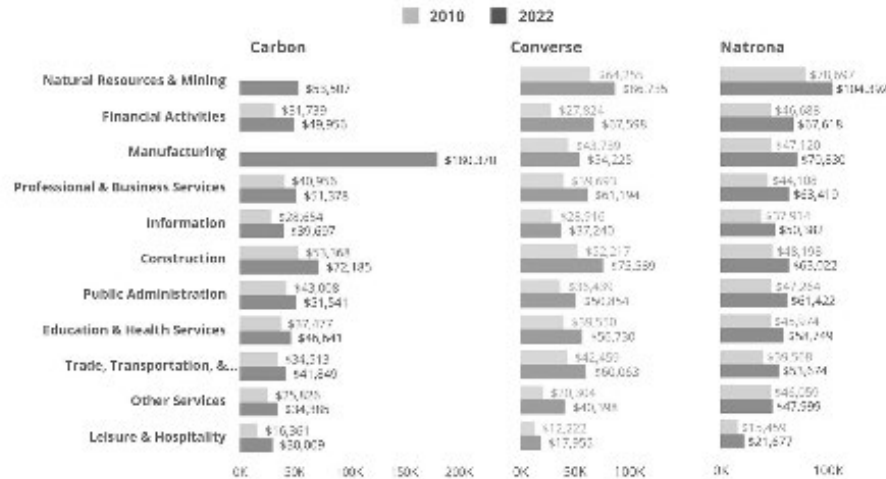
Converse County	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
Goods Producing	1,739	1,859	120	7%
Natural Resources & Mining	1,147	1,359	212	18%
Construction	521	352	-169	-32%
Manufacturing	71	148	77	108%
Service Providing	3,509	4,094	585	17%
Trade, Transportation, & Utilities	880	1,114	234	27%
Information	63	46	-17	-27%
Financial Activities	178	172	-6	-3%
Professional & Business Services	174	319	145	83%
Education & Health Services	1,189	1,358	169	14%
Leisure & Hospitality	559	582	23	4%
Other Services	144	144	0	0%
Public Administration	322	359	37	11%
All Industries	5,248	5,953	705	13%

Source: Quarterly Census of Employment and Wages and Root Policy Research.

**Wages.** Figure II-14 shows average annual wages by industry for each county in Wyoming's Central Region. Between 2010 and 2022, average annual wages grew for each industry where complete data are available.

Leisure & Hospitality, the only industry which has grown in employment in every county in the Region, pays the lowest average wages of any industry in the Central Region counties. The Natural Resources & Mining industry has the highest average annual wages of any industry in Converse and Natrona counties, while the Manufacturing industry has the highest average annual wages of any industry in Carbon county.

**Figure II-14.**  
**Average Annual Wages by Industry, Central Region, Counties, 2010 and 2022**



Note: Data are unavailable for categories without bars shown.  
 Source: Quarterly Census of Employment and Wages and Root Policy Research.

## Housing Market Trends

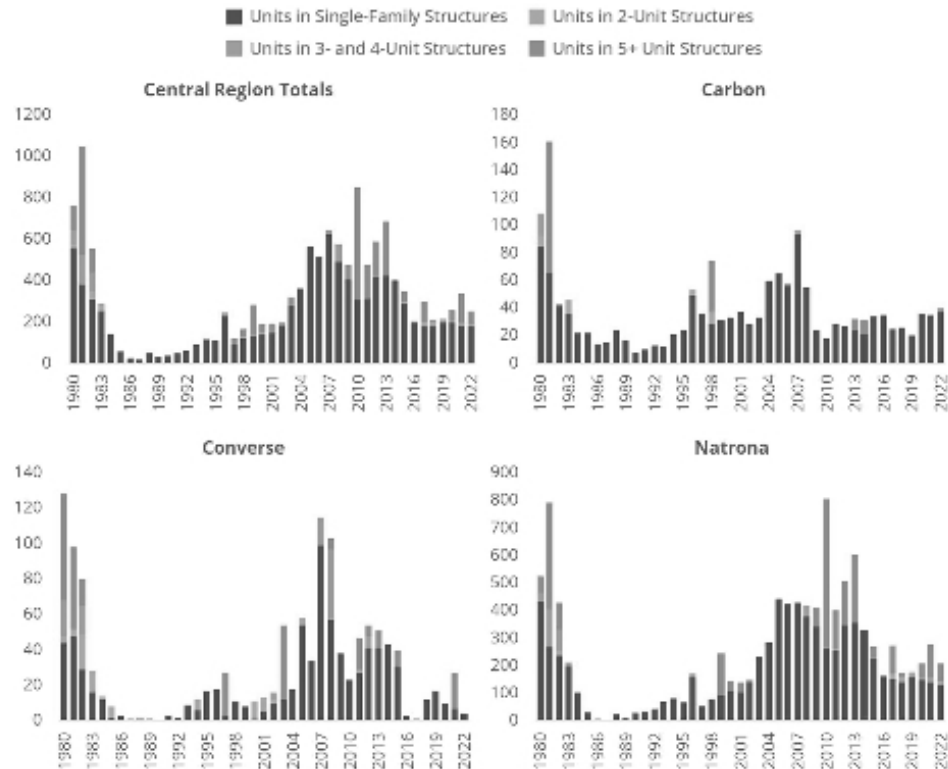
**Residential building permits.** Residential building permits in Wyoming's Central Region have been largely dominated by units in single-family structures. Around 74% of units permitted in the Central Region since 1980 are units in single-family structures and around 20% are units in multifamily structures of 5 units or more. Units in 2-unit structures account for 2% of units permitted, and units in 3- and 4-unit structures account for 4% of units permitted.

Figure II-15 below shows trends in residential building permits for the Central Region and each of its constituent counties. Note that scale differs in each geography's section of the figure based on total permits issued.

The Central Region and its counties saw high volumes of building permits issued in the early 1980s, peaking at 1,052 units permitted in 1982 before dropping with the 1980s recession. Building permitting gradually climbed to a peak in 2007 before dropping alongside the 2008 recession. This drop was significant and lasting in Carbon and Converse counties, but large-scale permitting for units in 5+ unit structures in Natrona county meant that regional permitting totals recovered to pre-recession levels in 2010. Natrona county's multifamily permits almost completely disappeared in 2013, causing a drop in regional totals. Building permitting remained low through 2022. The highest volume of multifamily

development (as indicated by building permits issued) over this period took place in Natrona county, the most populous county in the Region.

**Figure II-15.**  
**Building Permits by Units in Structure, Central Region, Counties, 1980-2022**



Source: U.S. Census Building Permits Survey and Root Policy Research.

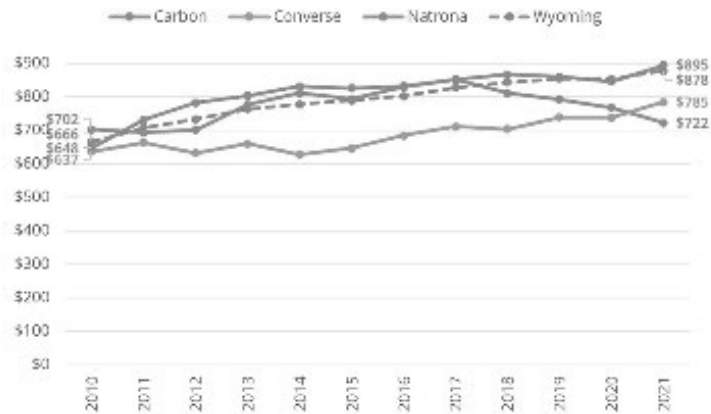
**Median rent.** Figure II-16 shows trends in median gross rent for the state of Wyoming and the constituent counties of the Central Region. Wyoming and each Central Region county experienced a growth in median gross rents between 2010 and 2021.

Over the time studied, Natrona county saw the largest rise in median gross rent (+\$247). As of 2021, Natrona county has the highest median gross rent in the Region at \$895 and is the only county in the Region for which median gross rent is higher than that of the state. Converse county has the second highest median gross rent at \$785, and rent is cheapest in Carbon county at \$722 even though Carbon county's rent was the most expensive in the

region in 2010. Carbon county was experiencing rent growth until 2017 but began experiencing rent declines afterwards.

**Figure II-16.**  
**Median Gross Rent, Wyoming and Central Region, Counties, 2010-2021**

Source:  
2010-2021 5-year ACS and  
Root Policy Research.



The median rent data shown above reflects rents for all rental units until 2021 according to ACS estimates. Additional detail for 2023 year-to-date median rents in units in structures containing five or more housing units is available in the table below. As data are not available for all multifamily units in each county, the final column in the table specifies the number of units reflected in the median rent estimate.

**Figure II-17.**  
**Multifamily Median Rent, Central Region, Counties, 2023 YTD**

Note:  
Multifamily units are defined as units in buildings of 5+ units.

Source:  
CoStar and Root Policy Research.

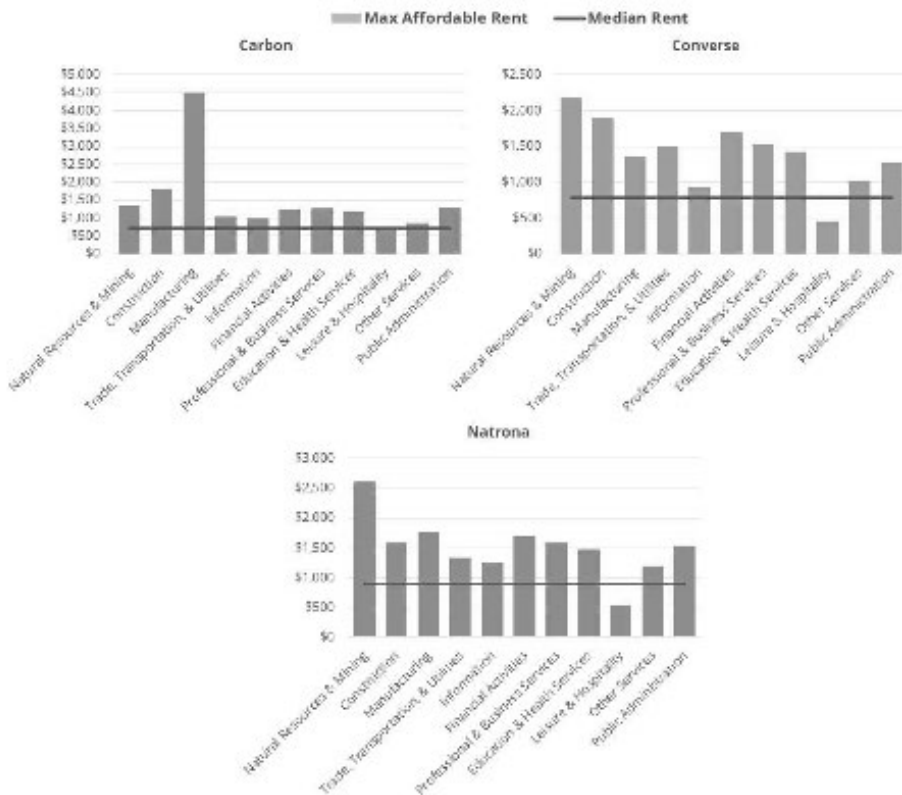
	Median Rent	Units Included
Carbon	\$827	200
Converse	\$857	120
Natrona	\$945	2,366

**Housing affordability by industry.** The federal government considers housing to be affordable when housing cost—the rent or mortgage payment plus taxes, utilities, mortgage, insurance, and HOA fees—consumes 30% or less of a household's gross income. Households spending more than 30% of their gross income are cost burdened.

Figures II-18 and II-19 below show housing affordability for the Central Region's workforce by comparing median rent and median home sales prices with rental and ownership affordability thresholds for individuals earning the average annual wages of industries in each county.

As shown in Figure II-18, median rent is affordable to individuals earning average wages in all industries except for Converse and Natrona counties' Leisure & Hospitality industries. This is significant as 11% of the Region's workforce is employed in Leisure & Hospitality in Converse county and Natrona county.

**Figure II-18.**  
**Rental Affordability by Industry, Central Region, Counties, 2021/22**



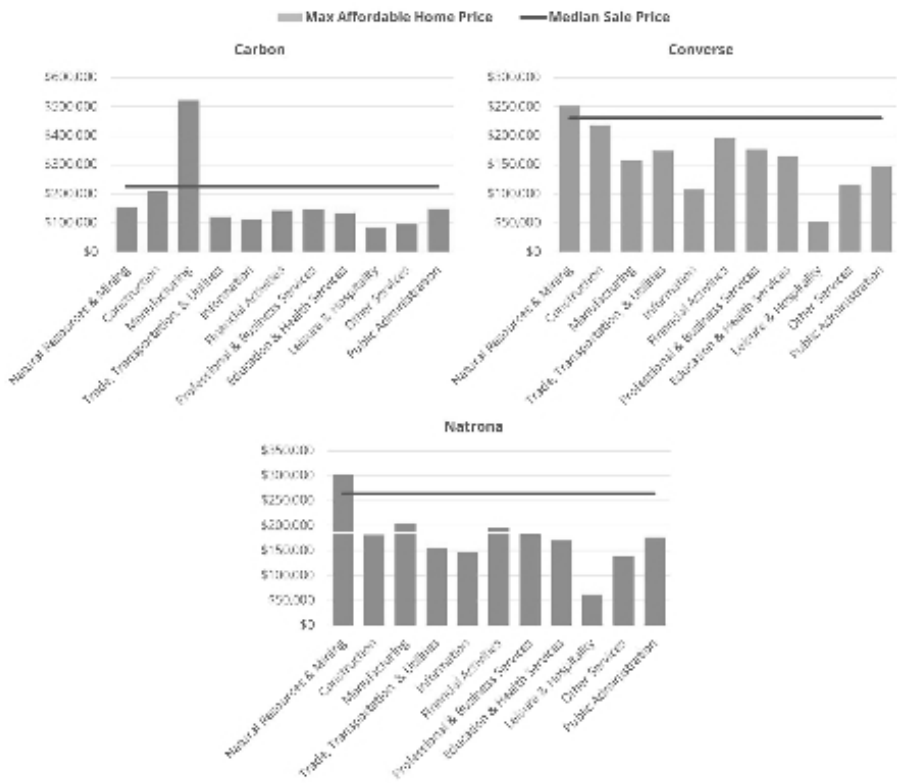
Note: Affordability estimates assume households spend no more than 30% of their income on housing. Data are unavailable for categories without bars shown. Max affordable rent estimates are based on 2022 average wage data, while median rent estimates are based on 2021 data.

Source: Quarterly Census of Employment and Wages, 2021 5-year ACS, and Root Policy Research.

Figure II-19 below shows home purchase affordability by industry. While average wage earners in most industries can afford to pay median rents in the Central Region, average wage earners in only their county's top-paying industry (Manufacturing in Carbon county and Natural Resources & Mining in Converse and Natrona counties) can afford to purchase a median-priced home. Supposing that all Central Region workers earn the average wages

for their industries in their counties, only 9% of Central Region workers can afford to purchase a median-priced home.

**Figure II-19.**  
**Purchase Affordability by Industry, Central Region, Counties, 2022**



Note: Affordability estimates assume a household spends 30% of its income on housing and assume a 30-year mortgage with a 7% interest rate, a 10% down payment, and 30% of monthly payment to property taxes, utilities, and insurance.

Source: Quarterly Census of Employment and Wages, Assessor data by the Wyoming Department of Revenue, and Root Policy Research.

**Rental vacancy.** Figure II-20 below shows rental vacancy rates for counties in Wyoming's Central Region in 2023.<sup>3</sup> As data are not available for all multifamily units in

<sup>3</sup> Vacancy data come from two sources: 1. Commercial real estate market analytics firm CoStar provides rental vacancy rates. CoStar collects data on vacancy rates for multifamily rental developments containing five or more units at the development level and aggregates these data to provide estimates at different geographic levels. 2. The Wyoming Rental Vacancy Survey (WRVS) which was undertaken on behalf of the Wyoming Community Development Authority, beginning in July 2023. The survey was designed to collect information regarding rentals throughout the State of



each county, the final column in the table specifies the number of units reflected in the vacancy rate estimate. According to 2023 estimates, Carbon county's vacancy rate of 3.3% is lower than the 5% rate considered healthy for the rental market. Natrona county's multifamily rental vacancy rate is around 5%, while Converse county's vacancy rate is higher.

**Figure II-20.**  
**Multifamily Rental Vacancy**  
**Rate, Central Region, Counties,**  
**2023 YTD**

Note:  
Rate for Carbon comes from the Wyoming Rental  
Vacancy Survey. CoStar Multifamily units are defined as  
units in buildings of 5+ units.

Source:  
CoStar, C&P Advisors Wyoming Rental Vacancy Survey,  
and Root Policy Research.

	Multifamily Vacancy Rate	Units Included
Carbon	3.3%	672
Converse	8.0%	605
Natrona	5.7%	4,095

**Mortgage loan activity.** Home Mortgage Disclosure Act (HMDA) data indicate loan originations and can be analyzed to understand shifts in home purchase activity by location, home value, occupancy type, and other factors. HMDA data only include home purchases with the use of a mortgage; home purchases made in cash, without a mortgage, are not included in the data. Therefore, the following estimates undercount the total volume of home purchases.

Figure II-21 shows the volume of home loan originations by county in the Central Region from 2018 to 2022. The Central Region saw a relatively low volume of home purchase loan originations in 2018 and 2019. Mortgage originations rose with low interest rates during the COVID-19 pandemic in 2020 and 2021. Mortgage originations fell below pandemic-era levels alongside steep increases in interest rates in 2022.

As of 2022, Natrona county accounts for 79% of home purchase loan originations in the Central Region. Carbon county accounts for 12% of loan originations, while 9% of the Region's loan originations came from Converse county. Natrona county's share of the Region's loan originations is outsized relative to its share of the Region's population (74%), while Carbon and Converse counties' shares of the Region's loan originations are two to four percentage points lower than their shares of the Region's population.

Wyoming. Data were collected through systematic online data collection and telephone survey. In places where the coverage of this survey was higher than CoStar coverage, data from this survey were used instead.

**Figure II-21.  
Home Loan  
Originations,  
Central Region,  
Counties, 2018-  
2022**

Note:  
Includes first lien loan  
originations only.

Source:  
HMDA and Root Policy  
Research.

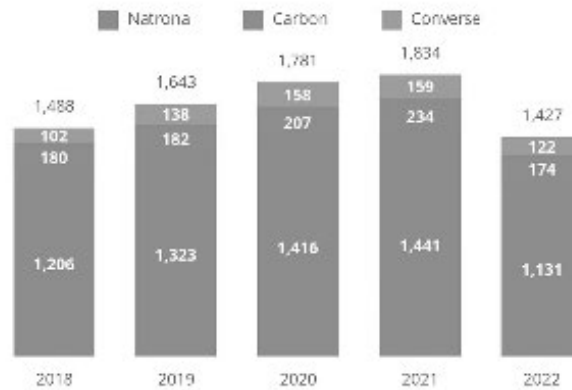


Figure II-22 shows trends in the median home value for originated home purchase loans for each county in the Central Region and for Wyoming. For all years 2018-2022, the median home value for originated home purchase loans is lower in every Central Region county than it is in Wyoming. In 2022, Natrona county has the highest median home value for originated home purchase loans at \$275,000, while Carbon county has the lowest at \$215,000. The median home value for originated home purchase loans has increased overall since 2018 in each county of the Region, with Natrona county seeing the largest increase in value (+\$65,000), followed closely by Converse county (+\$60,000).

**Figure II-22.  
Median Home  
Value for  
Originated Home  
Purchase Loans,  
Central Region,  
Counties, 2018-  
2022**

Note:  
Includes first lien loan  
originations only.

Source:  
HMDA and Root Policy Research.

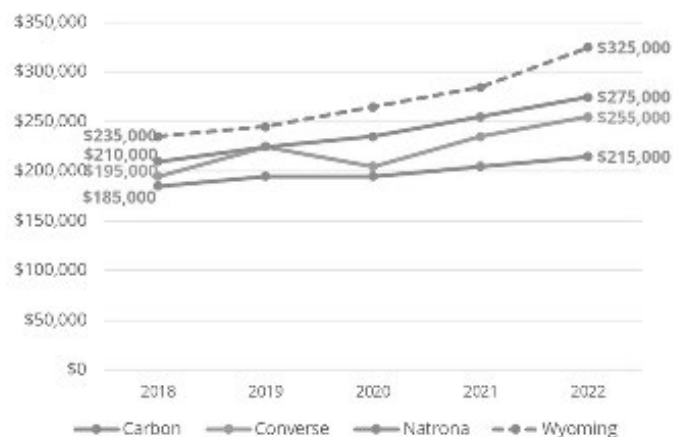


Figure II-23 shows trends in property values for originated home purchase loans by occupancy type between 2018 and 2022. In 2022, in the Central Region overall, home purchase loan originations for investment properties had the lowest median home value (\$215,000). Median home values were highest for principal residences (\$275,000).

As in the Region, home values for originated home purchase loans in Natrona county were higher for principal residences than they were for investment properties. Natrona county's median home values for principal residences and investment properties were higher than those for the Central Region, while median home values for principal residences in Carbon and Converse counties were lower than those for the Central Region.

The Central Region's median home values for each occupancy type appreciated between 2018 and 2022, though the scale of this appreciation varied. Second residences appreciated in value by only 4%, while principal residences and investment properties appreciated by 34% and 39% respectively. Median values for principal residences in Natrona and Converse counties appreciated in value at similar rates to that in the Region, while the median value for principal residences in Carbon county appreciated at a lower rate than that in the Region. The median value for investment properties in Natrona county appreciated at a slightly higher rate than that for investment properties in the Region.

**Figure II-23.**  
**Median Home Value for Originated Home Purchase Loans by Occupancy Type, Central Region, Counties, 2018-2022**

	Median Property Value		2018-2022 Change	
	2018	2022	Amount	Percent
<b>Carbon</b>				
Principal residence	\$185,000	\$225,000	\$40,000	22%
Second residence	N/A	N/A	N/A	N/A
Investment property	N/A	N/A	N/A	N/A
<b>Converse</b>				
Principal residence	\$195,000	\$255,000	\$60,000	31%
Second residence	N/A	N/A	N/A	N/A
Investment property	N/A	N/A	N/A	N/A
<b>Natrona</b>				
Principal residence	\$215,000	\$285,000	\$70,000	33%
Second residence	N/A	N/A	N/A	N/A
Investment property	\$155,000	\$225,000	\$70,000	45%
<b>Central Region</b>				
Principal residence	\$205,000	\$275,000	\$70,000	34%
Second residence	\$245,000	\$255,000	\$10,000	4%
Investment property	\$155,000	\$215,000	\$60,000	39%

Note: Includes first lien loan originations only. Data are omitted for categories with fewer than 20 sales.  
Source: HMDA and Root Policy Research.

Trends in home value by occupancy type in the Central Region are further illustrated in Figure II-24. Between 2018 and 2022, principal residences saw the largest rise in median value (+\$70,000), followed by investment properties (+\$60,000). Across the time studied, median property values were lowest for investment properties. Median property values were highest for principal residences in most years studied, though property values for second residences were highest in two years. Because over 90% of home loan originations in the Central Region are for principal residences, median values for home loan originations overall closely track those for principal residences.

**Figure II-24.  
Median Home  
Value by  
Occupancy Type,  
Central Region,  
2018-2022**

Note:  
Includes first lien loan  
originations only.

Source:  
HMDA and Root Policy  
Research.

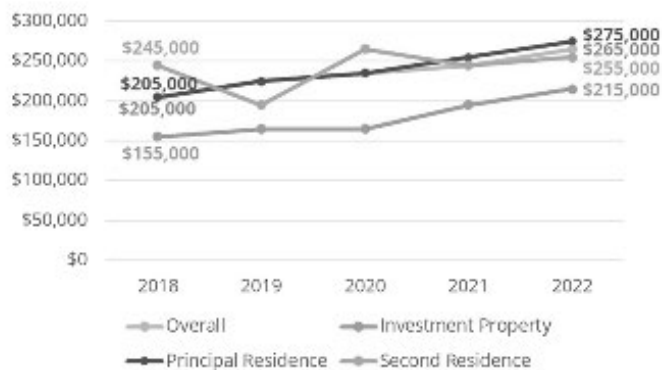
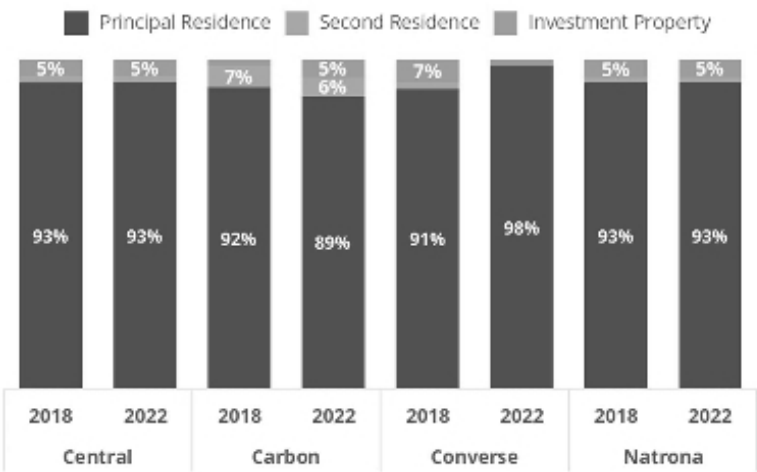


Figure II-25 shows the composition of total loan originations by occupancy type for the Central Region and each of its counties between 2018 and 2022. In 2022, principal residences accounted for 93% of home purchase home loan originations in the Central Region, while 5% of home loan originations were for investment properties and 2% were for second residences. In 2022, second residences accounted for the second largest share of loan originations in Carbon county, while investment properties accounted for the second largest shares of home loan originations in Converse and Natrona counties.

**Figure II-25.**  
**Distribution of Home Purchase Loan Originations by Occupancy Type and County, 2018 and 2022**



Note: Includes first lien originations only. 1% and 2% values are not labeled.  
 Source: HMDA and Root Policy Research.

**Home sales.** Assessor data from Wyoming’s Department of Revenue details home sales for single-family homes on ten acres or less for each county in Wyoming. Figure II-26 shows the median sales price for housing units sold in Wyoming’s Central Region in 2022. The median price for all housing units in the Region was \$256,450. Natrona county’s median home price was higher than the regional median at around \$265,000, while Converse and Carbon counties had lower median home prices at \$231,000 and \$226,000, respectively.

In the Central Region, single family homes had the highest median price of any home type at \$265,000. Modular and mobile homes had the second highest median price at \$231,000, while duplexes had the third highest median price at \$205,000. Townhomes and condos had the lowest median price at \$193,000.

Single family homes likewise had the highest median price of any home type for which data are available in Converse and Natrona counties. As in the Region, median sales prices in Natrona county are lower for townhomes and condos than they are for modular and mobile homes.

**Figure II-26.**  
**Median Home Sales Price by Structure Type, Central Region, Counties, 2022**

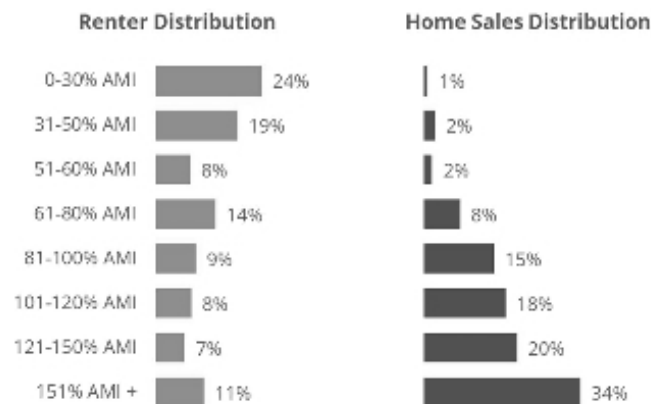
	Median Sales Price				
	All Units	Single Family	Duplex	Townhome/ Condo	Modular/ Mobile Home
<b>Central</b>	\$256,450	\$265,000	\$205,000	\$193,000	\$231,000
<b>Carbon</b>	\$226,000	\$232,500	N/A	N/A	N/A
<b>Converse</b>	\$231,500	\$249,000	N/A	N/A	\$216,000
<b>Natrona</b>	\$265,000	\$270,000	N/A	\$204,000	\$260,500

Note: Data are omitted for categories with fewer than 20 sales.

Source: Assessor data by the Wyoming Department of Revenue.

Figure II-27 below shows the distribution of renters and home sales by Area Median Income (AMI). The renter distribution presents the distribution of renter incomes by AMI range, while the home sales distribution presents the distribution of homes sold affordable to households with such income levels without being cost burdened. Although around 43% of the Central Region's renters have incomes below 50% AMI, only 3% of the homes sold in 2022 were affordable to individuals in this price range. Almost 75% of the Central Region's renters have incomes below 100% AMI, while only 25% of homes sold in 2022 were affordable to individuals earning less than 100% AMI.

**Figure II-27.**  
**Renter and Affordable Home Sales Distribution by AMI, Central Region**

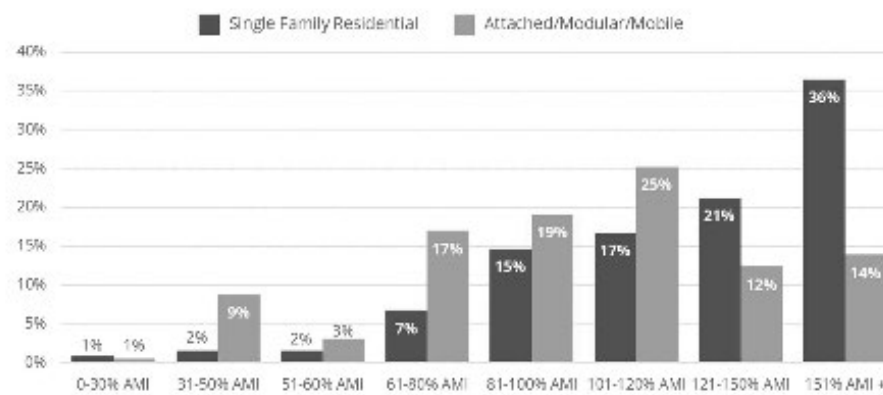


Note: Affordability estimates assume that a household spends 30% of their income on housing and assume a 30-year mortgage with a 7% interest rate, a 10% down payment, and 30% of monthly payment to property taxes, utilities, and insurance.

Source: 2021 5-year ACS, Assessor data by the Wyoming Department of Revenue, and Root Policy Research.

Figure II-28 displays the shares of total single family homes and attached, modular, and mobile homes sold in 2022 that were affordable to buyers in each AMI range. While single family homes are concentrated in the higher affordability ranges, a greater share of attached, modular, and mobile homes are affordable to low to moderate income households. It is important to note that the region's housing stock is dominated by single family homes, so low to moderate income buyers interested in purchasing attached, modular, or mobile homes in their price ranges face significant supply constraints.

**Figure II-28.**  
**Home Sales Distribution by AMI and Unit Type, Central Region, 2022**



Note: Affordability estimates assume that a household spends 30% of their income on housing and assume a 30-year mortgage with a 7% interest rate, a 10% down payment, and 30% of monthly payment to property taxes, utilities, and insurance.

Source: Assessor data by the Wyoming Department of Revenue and Root Policy Research.

## Housing Problems

**Cost burden.** The federal government, and most housing programs, consider housing as affordable when the housing payment—the rent or mortgage payment, plus taxes and utilities—consumes 30% or less of a household's gross income. Households who pay more than 30% are "cost burdened." This standard is derived from historically typical mortgage lending requirements and is also applied to renters.

Households experiencing cost burden have less money to spend on other essentials like healthcare, education, groceries, and transportation—adversely affecting their household well-being, limiting their economic growth potential, and constraining local spending.

Figure II-29 shows the shares of renters and owners in Wyoming, the Central Region, and each Central Region county who experienced cost burden in 2010 and 2021. For each year studied in each area studied, renters face cost burden at higher rates than homeowners do.

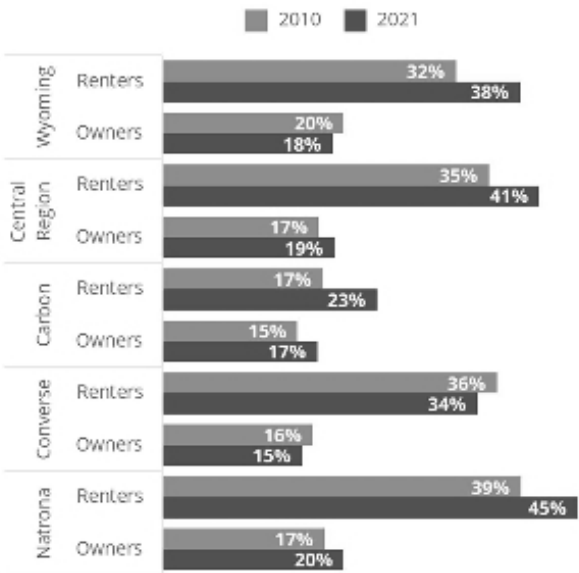
Between 2010 and 2021, the share of Wyoming renters experiencing cost burden rose by six percentage points from 32% to 38%, while the share of Wyoming homeowners experiencing cost burden decreased by two percentage points from 20% to 18%. As of 2021, both renters and homeowners in the Central Region experience cost burden at slightly higher rates (41% and 19% respectively) than renters and homeowners in Wyoming. Cost burden increased between 2010 and 2021 for both renters and homeowners in the Central Region.

As of 2021, renters in Carbon county experience cost burden at the lowest rate in the region (23%), while renters in Natrona county experience the highest rate of cost burden (45%). Homeowners in Converse county have the lowest rate of cost burden in the region (15%), while homeowners in Natrona county have the highest rate of cost burden in the region (20%).

Between 2010 and 2021, cost burden for owners and renters increased in Carbon and Natrona counties (which together account for over 85% of the Region's population). Cost burden for owners and renters decreased in Converse county.

**Figure II-29.**  
**Cost Burden by Tenure,**  
**Wyoming, Central**  
**Region, Counties, 2010**  
**and 2021**

Source:  
2010 and 2021 5-year ACS estimates and  
Root Policy Research.



**Overcrowding.** Housing units are considered overcrowded when they are occupied by more than one person per room. Figure II-30 illustrates the rate of overcrowding by tenure for Wyoming, the Central Region, and the counties of the Central Region.

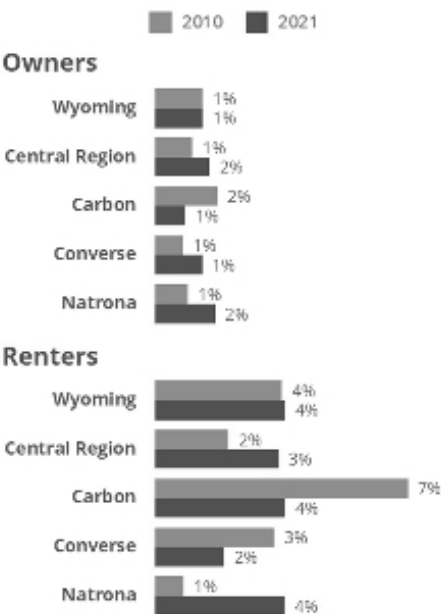


Overcrowding has been stable overall for Wyoming’s owner and renter households between 2010 and 2021, but it has increased for both owners and renters in the Central Region. The regional increase in overcrowding in renter households is due to the increase in overcrowding in renter households in Natrona County, the largest county in the region by population, while increases in overcrowding for owner households in Natrona and Converse counties underlie the regional increase in overcrowding for owners.

Renter households experience overcrowding at four times the rate of owner households in Wyoming and at greater rates than owner households in the Central Region and each of its counties.

**Figure II-30.**  
**Overcrowding by**  
**Tenure, Wyoming,**  
**Central Region,**  
**Counties, 2010 and**  
**2021**

Source:  
ACS 2021 5-year estimates and Root  
Policy Research.



### Short Term Rental Market

Short-terms rentals, or STRs, play a unique role within housing markets, especially those with a large tourism industry, as they can provide economic benefit (to homeowners through rental revenue and the City through sales tax/tourism revenue) but may disrupt the long-term rental market if they account for a substantial portion of the total housing stock.

**Carbon County and Saratoga.** According to data from AirDNA (a market analytics website for short term rentals), there are 69 homes listed as short-term rentals (STRs) in

Saratoga<sup>4</sup> and 245 STRs in Carbon county.<sup>5</sup> Saratoga's STR units, which may be active or inactive at the time of reporting, account for 4.7% of its total housing stock<sup>6</sup>. This suggests that short-term rentals may constrain housing supply in Saratoga.

Figure II-31 below maps the volume of STRs in Carbon county's ZIP Codes. While Saratoga's main ZIP Code, 82331, has a high volume of STRs, a higher volume of STRs is concentrated in the 82604 ZIP Code adjacent to Casper.

**Figure II-31.**  
**Short Term Rental**  
**Units by ZIP Code,**  
**Saratoga and**  
**Carbon County,**  
**2023**

**Note:**

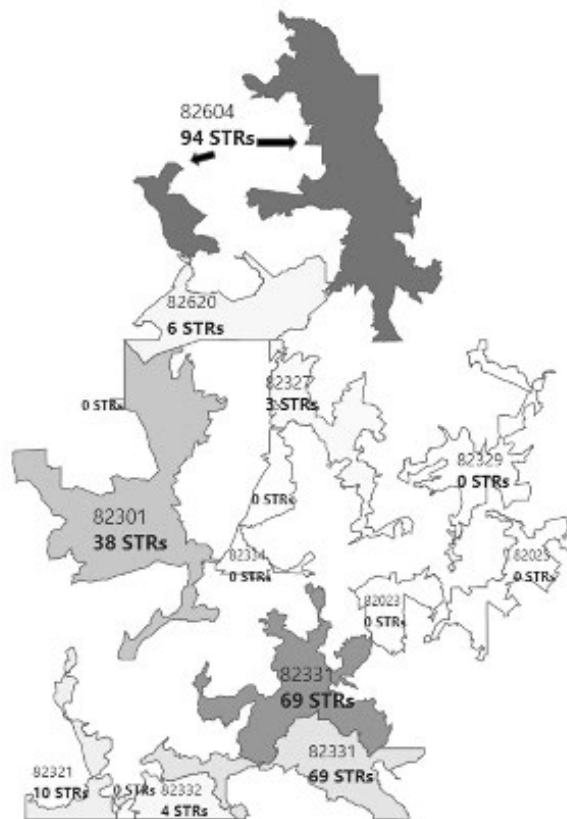
The Carbon county presented in this section consists of the following ZIP Codes: 82604, 82301, 82331, 82620, 82329, 82325, 82321, 82327, 82083, 82332, 82324, 82334, 82335, 82322, 82323, and 82615.

The city of Saratoga is defined as the ZIP Code 82331.

This map uses ZIP Code Tabulation Areas (ZCTAs) from the U.S. Census Bureau to approximate ZIP Code boundaries. ZCTAs do not exist for uninhabited areas or areas with very few addresses. ZIP Codes without corresponding ZCTAs have not been mapped.

**Source:**

AirDNA.com



<sup>4</sup> AirDNA.com provides market analytics for STRs by ZIP Code. ZIP Code boundaries do not entirely align with city or county boundaries. In this section, Saratoga is represented by its main ZIP Code, 82331.

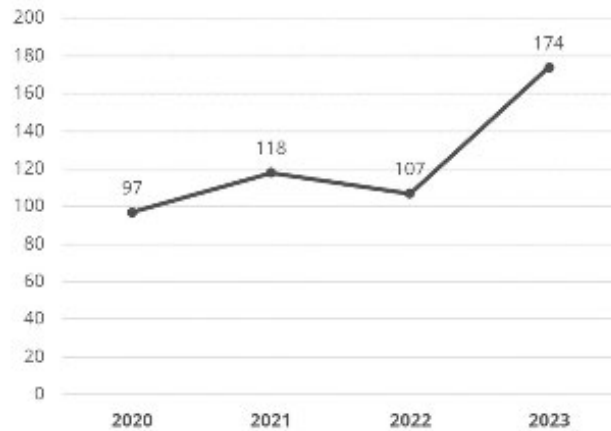
<sup>5</sup> Because some ZIP Codes cross county lines, it is not possible to provide an exact picture of the STR market in Carbon county. The Carbon county presented in this section consists of the following ZIP Codes: 82604, 82301, 82331, 82620, 82329, 82325, 82321, 82327, 82083, 82332, 82324, 82334, 82335, 82322, 82323, and 82615.

<sup>6</sup> According to 2022 5-year ACS estimates, there are 1,459 housing units in the 82331 ZIP Code Tabulation Area.

Figure II-32 below demonstrates the overall increase in the number of active STRs in Carbon county in November, 2020-2023. Note that STR activity is seasonal, with higher activity typically observed in the summer months.

**Figure II-32.**  
**Active Short Term**  
**Rental Units,**  
**Carbon County,**  
**2020-2023**

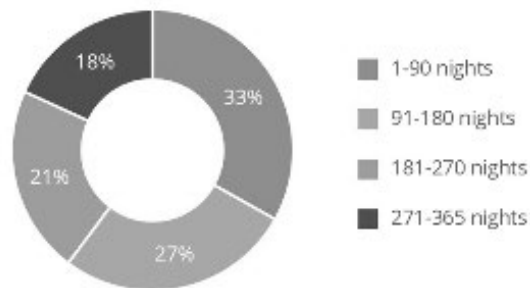
Note:  
Counts reflect units available in  
November of each year.  
The Carbon county presented in this  
section consists of the following ZIP  
Codes: 82604, 82301, 82331, 82620,  
82329, 82325, 82321, 82327, 82083,  
82332, 82324, 82334, 82335, 82322,  
82323, and 82615.  
Source:  
AirDNA.com



As shown in Figure II-33, 60% of short term rentals in Carbon county are available for fewer than 180 nights per year. These are considered part-time STRs, some of which may be permanently occupied and rented occasionally, and others of which may be rented consistently and otherwise vacant or used seasonally.

**Figure II-33.**  
**Short Term Rental**  
**Units by Annual**  
**Availability, Carbon**  
**County, 2023**

Note:  
The Carbon county presented in this  
section consists of the following ZIP  
Codes: 82604, 82301, 82331, 82620,  
82329, 82325, 82321, 82327, 82083,  
82332, 82324, 82334, 82335, 82322,  
82323, and 82615.  
Source:  
AirDNA.com



According to AirDNA, 86% of STRs in Carbon county are entire homes and 13% are private rooms. Less than 1% are shared rooms. Figure II-34 below shows the distribution of STRs by number of bedrooms; 25% of STRs in the county have 1 bedroom, 35% have 2 bedrooms, and 26% have 3 bedrooms.

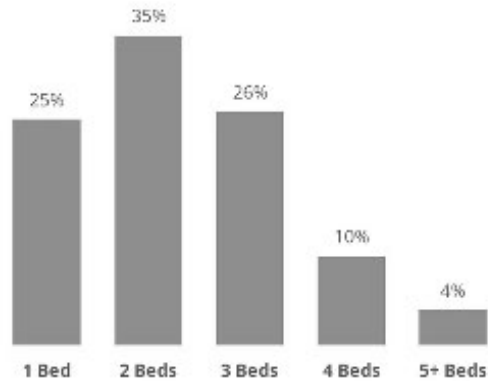
**Figure II-34.  
Short Term Rental  
Units by Number of  
Bedrooms, Carbon  
County, 2023**

Note:

The Carbon county presented in this section consists of the following ZIP Codes: 82604, 82301, 82331, 82620, 82329, 82325, 82321, 82327, 82083, 82332, 82324, 82334, 82335, 82322, 82323, and 82615.

Source:

AirDNA.com



## Housing Needs Projections

This section estimates the number of housing units needed to accommodate household growth through 2030, using population projections prepared by the Wyoming Economic Analysis Division.

Figure II-35 shows two estimates of the number of housing units each county in the Central Region needs to add to accommodate household growth and replace the loss in the housing stock. The first estimate assumes a housing loss of 0.24% every two years, and the second estimate assumes a housing loss of 1.7% every two years.<sup>7</sup> Estimates are shown as totals and by AMI, based on the state's AMI distribution provided by recent data from HUD's Comprehensive Housing Affordability Strategy (CHAS).

The estimates indicate that by 2030, between 71 and 611 total housing units will be needed to accommodate Carbon county households, between 538 and 972 units will be needed to accommodate Converse county households, and between 2,287 and 4,700 units will be needed to accommodate Natrona county households.

<sup>7</sup> According to the last Components of Inventory Change Report produced by HUD in 2017, which used American Housing Survey data, it was estimated that between 2015 and 2017, about 0.24% of the national housing stock was lost through demolitions or disasters alone. According to a Brookings Institute report, the two-year housing loss over the period 1985-2013 was 1.7% in the West region of the country (<https://www.brookings.edu/articles/unpacking-the-housing-shortage-puzzle/#:~:text=Churn%20is%20the%20sum%20of,built%20homes%20and%20no%20demolitions>).

**Figure II-35.**  
**Projected Housing Units Needed Between 2021 and 2030 by Tenure and**  
**AMI, Central Region, Counties**

	Renters		Homeowners		Total	
	Estimate 1	Estimate 2	Estimate 1	Estimate 2	Estimate 1	Estimate 2
<b>Carbon</b>	<b>21</b>	<b>179</b>	<b>50</b>	<b>431</b>	<b>71</b>	<b>611</b>
0%-30% AMI	6	48	5	39	10	87
31%-50% AMI	3	25	5	47	8	72
51%-80% AMI	5	47	7	57	12	104
81%-100% AMI	2	16	6	49	8	65
100% + AMI	5	43	28	239	33	282
<b>Converse</b>	<b>127</b>	<b>229</b>	<b>412</b>	<b>744</b>	<b>538</b>	<b>972</b>
0%-30% AMI	32	58	17	30	49	88
31%-50% AMI	28	50	43	77	70	127
51%-80% AMI	16	28	73	132	89	160
81%-100% AMI	0	0	50	91	50	91
100% + AMI	51	93	229	414	280	507
<b>Natrona</b>	<b>673</b>	<b>1,382</b>	<b>1,615</b>	<b>3,318</b>	<b>2,287</b>	<b>4,700</b>
0%-30% AMI	158	325	111	228	269	553
31%-50% AMI	135	278	121	249	257	527
51%-80% AMI	143	294	279	573	422	867
81%-100% AMI	85	174	191	393	276	567
100% + AMI	152	311	912	1,875	1,064	2,186

Note: Holds latest CHAS tenure and income distribution constant.

Source: HUD CHAS 2020 estimates, American Housing Survey, and Root Policy Research.

## Recommendations from Previous Studies

The 2013 Natrona County Land Use and Budget Report<sup>8</sup> highlights the impact that various development patterns on a county's budget. The study concludes that developments closer to urban centers (metro infill) are more fiscally responsible than rural exurban and ranchette-style developments, which are farther away from service centers.

A summary of recommended strategies to address housing needs in the report includes:

<sup>8</sup> <https://sonoraninstitute.org/files/pdf/leaping-the-budget-gap-land-use-a-fiscal-planning-in-natrona-county-wyoming-updated-05192013.pdf>

- As per Wyoming State Law adopted by Natrona County, review of developments larger than 35 acres is allowed. Additionally, work in collaboration with the cities and towns of the county to plan land use and development. This will help create incentives for the annexation of subdivisions that are appropriate or for the development of subdivisions that have the potential for annexation in the future.
- Create incentives for development closer to cities/towns, e.g. impact fees to cover the true cost of services. Designate remote areas as limited service and infrastructure districts and educate property owners and buyers about these limitations.
- Establish a zoning ordinance that promotes urban infill and discourages suburban sprawl.
- Citizens should be given the opportunity to vote on which capital improvement projects the public should invest in.

## Appendix

The following tables show AMI limits by county, examples of establishment types by industry, and federal poverty thresholds by household size.

**Figure II-36.**  
**AMI Limits, Central Region,**  
**Counties, 2021**

Source:  
U.S. Department of Housing and Urban  
Development.

2021 2-person AMI	Carbon	Converse	Natrona
30% AMI	\$19,440	\$20,400	\$19,440
50% AMI	\$32,400	\$34,000	\$32,400
80% AMI	\$25,920	\$27,200	\$25,920
100% AMI	\$64,800	\$68,000	\$64,800
120% AMI	\$77,760	\$81,600	\$77,760

**Figure II-37.**  
**AMI Limits, Central Region,**  
**Counties, 2022**

Source:  
U.S. Department of Housing and Urban  
Development.

2022 2-person AMI	Carbon	Converse	Natrona
30% AMI	\$21,030	\$21,930	\$21,030
50% AMI	\$35,050	\$36,550	\$35,050
80% AMI	\$28,040	\$29,240	\$28,040
100% AMI	\$70,100	\$73,100	\$70,100
120% AMI	\$84,120	\$87,720	\$84,120

**Figure II-38.**  
**QCEW Establishment Examples by Industry**

Establishment Examples	
<b>Goods Producing</b>	
<b>Natural Resources &amp; Mining</b>	Farms, ranches, dairies, greenhouses, nurseries, orchards, hatcheries, mine operation and mining support activities.
<b>Construction</b>	General contractors, design-builders, construction managers, turnkey contractors.
<b>Manufacturing</b>	Plants, factories, mills.
<b>Service Providing</b>	
<b>Trade, Transportation, &amp; Utilities</b>	Wholesale merchants, distributors, shippers, import/export merchants, office supply retailers, computer and software retailers, building materials dealers, plumbing supply retailers, electrical supply retailers, electric power, natural gas, steam supply, water supply, and sewage removal.
<b>Information</b>	Software publishing, broadcasting and content providers, telecommunications, computing infrastructure providers, data processing, Web hosting.
<b>Financial Activities</b>	Commercial banks, credit unions, rental and leasing services.
<b>Professional &amp; Business Services</b>	Legal advice and representation, accounting, bookkeeping, payroll services, architectural, engineering, consulting services.
<b>Education &amp; Health Services</b>	Schools, colleges, universities, hospitals, nursing care facilities.
<b>Leisure &amp; Hospitality</b>	Hotels, restaurants, gambling establishments.
<b>Other Services</b>	Equipment and machinery repairing, grantmaking, advocacy, and providing drycleaning and laundry services, personal care services.
<b>Public Administration</b>	Federal, state, and local government agencies.

Source: BLS Quarterly Census of Employment and Wages.

**Figure II-39.**  
**Federal Poverty Thresholds by Household Size, 2010**

Size of Family Unit	Weighted Average Thresholds	Related Children Under 18 Years								
		None	One	Two	Three	Four	Five	Six	Seven	Eight or More
One person (unrelated individual)	\$11,139									
Under 65 years	\$11,344	\$11,344								
65 years and over	\$10,458	\$10,458								
Two people	\$14,218									
Householder under 65 years	\$14,676	\$14,602	\$15,030							
Householder 65 years and over	\$13,194	\$13,180	\$14,973							
Three people	\$17,374	\$17,057	\$17,552	\$17,568						
Four people	\$22,314	\$22,491	\$22,859	\$22,113	\$22,190					
Five people	\$26,439	\$27,123	\$27,518	\$26,675	\$26,023	\$25,625				
Six people	\$29,897	\$31,197	\$31,320	\$30,675	\$30,056	\$29,137	\$28,591			
Seven people	\$34,009	\$35,896	\$36,120	\$35,347	\$34,809	\$33,805	\$32,635	\$31,351		
Eight people	\$37,934	\$40,146	\$40,501	\$39,772	\$39,133	\$38,227	\$37,076	\$35,879	\$35,575	
Nine people or more	\$45,220	\$48,293	\$48,527	\$47,882	\$47,340	\$46,451	\$45,227	\$44,120	\$43,845	\$42,156

Source: U.S. Census Bureau.



**Figure II-40.**  
Federal Poverty Thresholds by Household Size, 2021

Size of Family Unit	Weighted Average Thresholds	Related Children Under 18 Years								
		None	One	Two	Three	Four	Five	Six	Seven	Eight or More
One person (unrelated individual)	\$13,788									
Under 65 years	\$14,097	\$14,097								
65 years and over	\$12,996	\$12,996								
Two people	\$17,529									
Householder under 65 years	\$18,231	\$18,145	\$18,677							
Householder 65 years and over	\$16,400	\$16,379	\$18,606							
Three people	\$21,559	\$21,196	\$21,811	\$21,831						
Four people	\$27,740	\$27,949	\$28,406	\$27,479	\$27,575					
Five people	\$32,865	\$33,705	\$34,195	\$33,148	\$32,338	\$31,843				
Six people	\$37,161	\$38,767	\$38,921	\$38,119	\$37,350	\$36,207	\$35,529			
Seven people	\$42,156	\$44,606	\$44,885	\$43,925	\$43,255	\$42,009	\$40,554	\$38,958		
Eight people	\$47,093	\$49,888	\$50,329	\$49,423	\$48,629	\$47,503	\$46,073	\$44,585	\$44,207	
Nine people or more	\$56,325	\$60,012	\$60,303	\$59,501	\$58,828	\$57,722	\$56,201	\$54,826	\$54,485	\$52,386

Source: U.S. Census Bureau.

## SECTION III.

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### NORTHEAST REGION

## SECTION III. Northeast Region

This regional summary provides demographic, economic, and housing market data for the Northeast Region. Wyoming's Northeast Region is comprised of Campbell county, Crook county, Johnson county, Sheridan county, and Weston county.

### Northeast Region



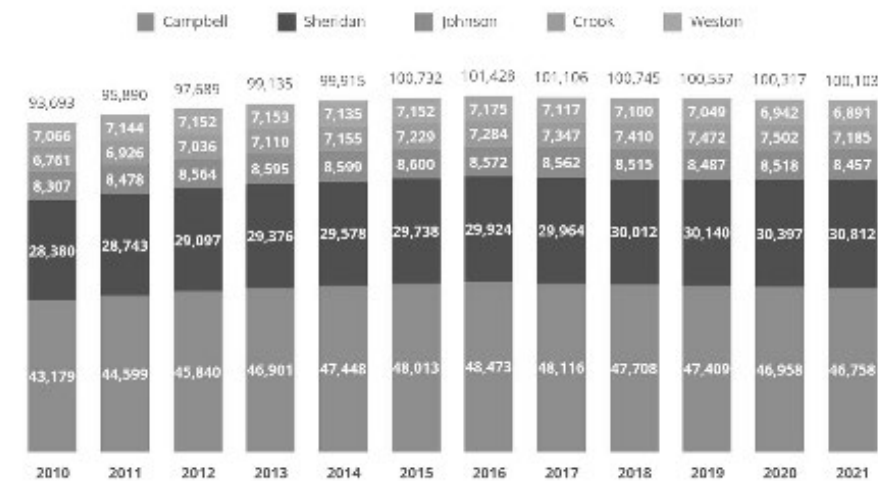
### Demographic Trends

**Population growth.** The population of Wyoming's Northeast Region grew by around 6.8% from 2010 to 2021 as the State of Wyoming's population grew by around 5.7%. As shown in Figure III-1, the Northeast Region's population increased each year from 93,693 residents in 2010 to 101,428 residents in 2016 and decreased modestly each year from 2016 to 100,103 residents in 2021. This trend mirrors trends in the State of Wyoming's population, which grew each year from 2010 to 2017 and has modestly decreased since.

The populations of the four largest counties in the Region (Campbell, Sheridan, Johnson, and Crook counties) increased overall between 2010 and 2021, while Weston county's population decreased by 2.5%. The highest rates of population growth occurred in Sheridan (8.6%) and Campbell (8.3%) counties, the two largest counties in the region.

Campbell and Sheridan counties make up 47% and 31% of the region's population, respectively. Campbell, Johnson and Weston counties experienced zero or positive annual population growth until the mid-to-late 2010s when they entered prolonged periods of zero or negative growth. Sheridan county had positive or zero annual population growth throughout. Crook county had negative annual population growth only in 2021.

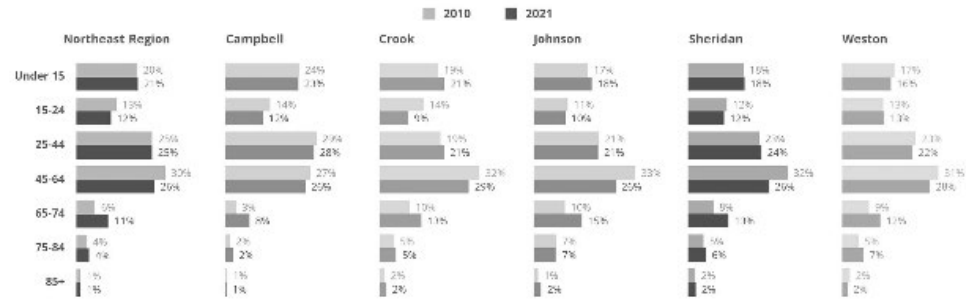
**Figure III-1.**  
**Population, Northeast Region, 2010-2021**



Source: 2010-2021 5-year ACS and Root Policy Research.

**Age distribution.** As shown in Figure III-2, between 2010 and 2021, the Northeast Region's share of residents aged 65 and older increased by around five percentage points from 11% to 16%. The share of residents aged 65 and older increased in each county in the Northeast Region. At the same time, the Region's share of residents aged 25-64 decreased by around four percentage points from 55% to 51%. Each county within the Region experienced decreases in the share of residents aged 25-64. The Northeast Region's growing senior population underscores the importance of providing aging-friendly housing options moving forward, while the Region's shrinking share of working-aged individuals raises concerns about a shrinking workforce.

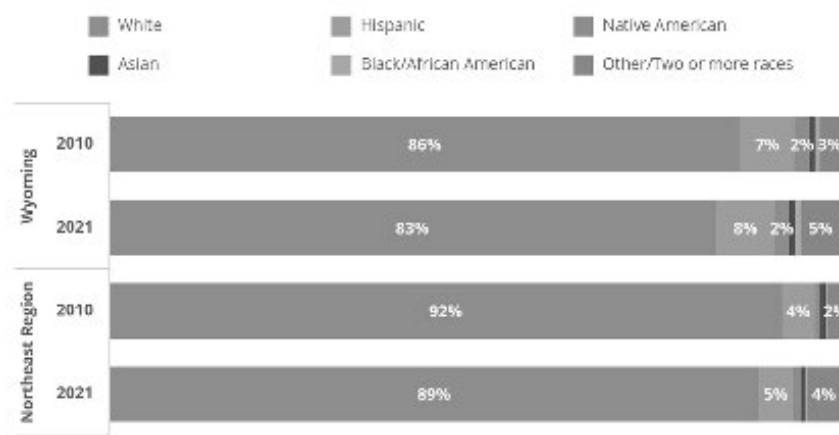
**Figure III-2.**  
**Age Distribution, Northeast Region, 2010 and 2021**



Source: 2010 and 2021 5-year ACS and Root Policy Research.

**Racial and ethnic distribution.** As shown in Figure III-3, the Northeast Region is less diverse than the state; the share of the population identifying as non-Hispanic White is six percentage points higher in the Northeast Region than in Wyoming. However, the Northeast Region's population has become more racially and ethnically diverse since 2010. The share of non-Hispanic White residents has decreased by three percentage points, while the shares of the population identifying as Hispanic and other/two or more races increased by one and two percentage points, respectively.

**Figure III-3.**  
**Race and Ethnicity, Wyoming and Northeast Region, 2010 and 2021**

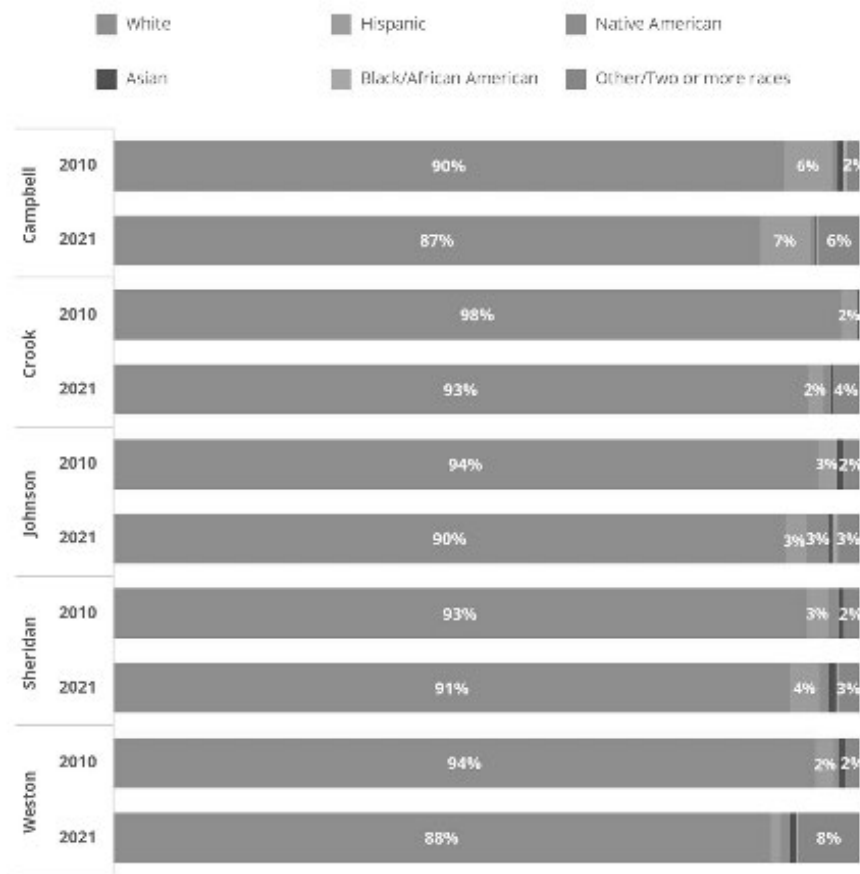


Note: The categories White, Native American, Asian, Black/African American, and Other/Two or more races include only non-Hispanic. The Hispanic category refers to Hispanics of any race. 0% and 1% labels are not shown.

Source: 2010 and 2021 5-year ACS and Root Policy Research.

Figure III-4 shows racial and ethnic distributions for each county within the Northeast Region in 2010 and 2021. Campbell county is the most racially and ethnically diverse county within the Northeast Region, followed by Weston county. Crook county is the least racially and ethnically diverse county in the Region. Campbell county has the largest share of Hispanic residents and is home to 65% of the Northeast Region's Hispanic population. Weston county's population identifying as other/two or more races quadrupled as a share of its total population between 2010 and 2021.

**Figure III-4.**  
**Race and Ethnicity, Northeast Region, Counties 2010 and 2021**



Note: The categories White, Native American, Asian, Black/African American, and Other/Two or more races include only non-Hispanic. The Hispanic category refers to Hispanics of any race. 0% and 1% labels are not shown.  
 Source: 2010 and 2021 5-year ACS and Root Policy Research.

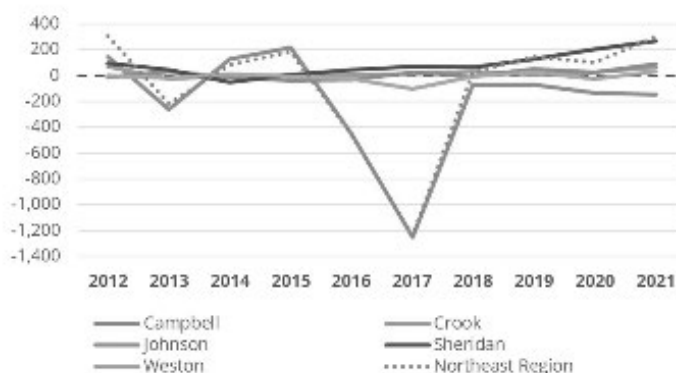
**Migration.** Figure III-5 shows net migration data based on year-to-year address changes reported on individual income tax returns filed with the IRS for each county in Wyoming’s Northeast Region from 2012 to 2021. Net migration<sup>1</sup> in the Northeast Region was positive

<sup>1</sup> Net migration is the difference between inflows and outflows, where inflows represent the number of new households who filed a return in the county and filed a return in a different county the previous year and outflows are

in 2012, negative in 2013, and positive in 2014 and 2015 before becoming negative in 2016 and 2017, tracking Campbell county's significant negative net migration alongside the energy sector's contraction. As Campbell county's negative net migration recovered to near-zero negative numbers in 2018, the Region's net migration became positive. Regional net migration remained positive through 2021.

**Figure III-5.  
Net Migration,  
Northeast  
Region, Counties,  
2012-2021**

Source:  
Internal Revenue Service and  
Root Policy Research.



IRS data also provide the total adjusted gross income, which allows the estimation of the average adjusted gross income<sup>2</sup> for inflow and outflow returns each year. Figure III-6 shows the difference between the average income of in-migrants and the average income of out-migrants for each county in the Northeast Region from 2012 to 2021 to identify migration-driven trends in income. It should be noted that these are averages and can be skewed by a small number of very high income households in some of the years. Key trends are outlined here:

- In Johnson and Sheridan counties in-migrants tended to have higher average incomes than out-migrants. In Weston county, the average income of in-migrants has been similar to the average income of out-migrants.
- Households moving out of Campbell county have had higher average incomes than households moving into the county.
- In Crook county, since 2016, in-migrants tended to have higher average incomes than out-migrants.

the number of households who filed a return in a county other than the specified county and had filed a return in the specified county the previous year.

<sup>2</sup> Adjusted Gross Income (AGI) is defined as gross income minus adjustments to income. Gross income includes your wages, dividends, capital gains, business income, retirement distributions as well as other income. Adjustments to Income include such items as Educator expenses, Student loan interest, Alimony payments or contributions to a retirement account.



**Figure III-6.**  
**Average Income of In-migrants and Out-migrants, Northeast Region, Counties 2012-2021**



Source: Internal Revenue Service and Root Policy Research.

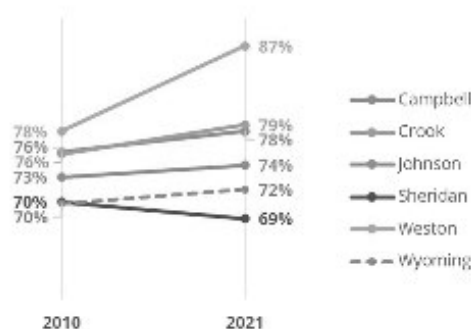
**Homeownership.** Estimates of homeownership rates for each county in the Northeast Region are shown in Figure III-7. As of 2021, all counties in the Northeast Region have homeownership rates higher than that of Wyoming as a whole. Weston county has the highest homeownership rate of any county in the Northeast Region and in Wyoming.

Between 2010 and 2021, homeownership decreased only in Sheridan county (by one percentage point). Homeownership increased in Crook county by three percentage points, in Campbell county by two percentage points, and in Johnson county by one percentage point.

While it is estimated that Weston county saw a nine percentage point increase in homeownership over the time studied, it should be noted that this county's estimated homeownership rate had substantial margins of error in both 2010 and 2021. There are several possible explanations for this county's large increase in homeownership. First, in line with regional trends, the share of Weston county's population aged 65 and older, an age group more likely to own their homes, has increased significantly since 2010. Second, total employment in Weston county increased by 4% over the time studied while regional employment fell by 6%.

**Figure III-7.**  
**Homeownership Rates,**  
**Northeast Region, Counties**  
**2010 and 2021**

Source:  
2010 and 2021 5-year ACS and Root Policy  
Research.



**Income and poverty.** Figure III-8 shows median income for homeowners and renters in each county in Wyoming's Northeast Region. Key trends in median income by tenure are outlined here.

- In 2021, median income for renters in the Northeast Region is around 40-45% of median owner income in Campbell, Johnson, Sheridan, and Weston counties and around 68% of median owner income in Crook county.
- From 2010 to 2021, median income for both owners and renters increased for both owners and renters in Crook and Sheridan counties. This trend may be partially migration-driven in Crook county as in-migrants have had higher average incomes than out-migrants in most years studied.
- Median income increased for homeowners and decreased for renters in Campbell, Johnson, and Weston counties.
- In 2021, the median homeowner income for each county in the Northeast Region except for Campbell county is lower than that of Wyoming. The median renter income for each county in the Region except for Crook county is lower than that of Wyoming.

**Figure III-8.  
Median Income by  
Tenure, Northeast  
Region, Counties, 2010  
and 2021**

Source:  
2010 and 2021 5-year ACS and Root Policy  
Research.

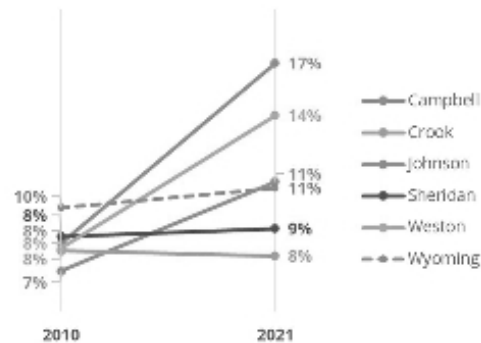
	Median Income		2010-2021 Change	
	2010	2021	Amount	Percent
<b>Campbell</b>				
Owner	\$86,445	\$94,857	\$8,412	10%
Renter	\$48,008	\$38,333	-\$9,675	-20%
<b>Crook</b>				
Owner	\$55,663	\$70,625	\$14,962	27%
Renter	\$38,203	\$48,281	\$10,078	26%
<b>Johnson</b>				
Owner	\$50,814	\$67,256	\$16,442	32%
Renter	\$38,125	\$27,120	-\$11,005	-29%
<b>Sheridan</b>				
Owner	\$57,683	\$81,519	\$23,836	41%
Renter	\$31,618	\$35,634	\$4,016	13%
<b>Weston</b>				
Owner	\$60,333	\$74,032	\$13,699	23%
Renter	\$35,601	\$33,646	-\$1,955	-5%
<b>Wyoming</b>				
Owner	\$64,489	\$81,875	\$17,386	27%
Renter	\$33,550	\$39,506	\$5,956	18%

Poverty rates for each county in Wyoming's Northeast Region are presented in Figure III-9. In 2021, Sheridan and Crook counties had poverty rates lower than that of Wyoming (11 percent). Johnson, Weston, and Campbell counties had poverty rates higher than that of the state in 2021.

Between 2010 and 2021, poverty rates increased by around eight percentage points in Johnson county, by six percentage points in Weston county, by four percentage points in Campbell county, and by less than one percentage point in Sheridan county. Crook county's poverty rate remained constant.

**Figure III-9.**  
**Poverty Rate, Northeast**  
**Region, Counties, 2010 and**  
**2021**

Source:  
 2010 and 2021 5-year ACS and Root Policy Research.

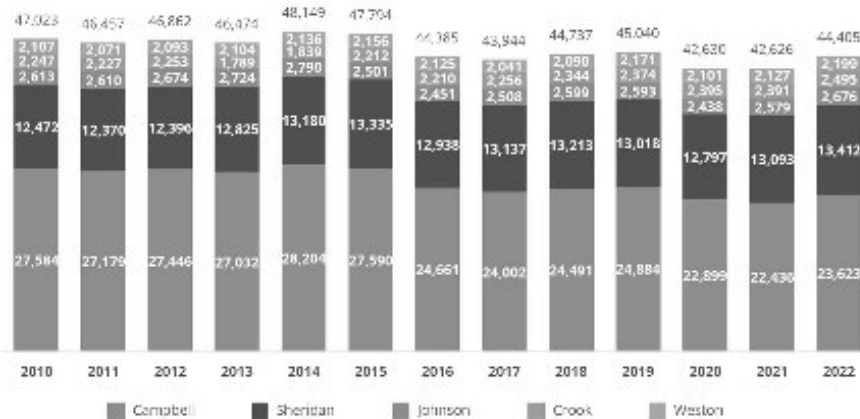


## Economic Trends

**Employment.** As shown in Figure III-10 below, total employment in the Northeast Region decreased by nearly 6% between 2010 and 2022. Total employment hovered around 47,000 jobs until 2015; in 2016 employment dropped by over 3,000 jobs and losses were concentrated in Campbell and Sheridan counties. The Region saw positive employment growth in 2018 and 2019 before reaching a low of around 42,630 jobs with the pandemic in 2020 and 2021. In 2022 regional employment recovered to pre-pandemic levels.

For each year studied, as expected the two most populous counties accounted for the two largest shares of regional employment. In 2021, Campbell county was the only county for which the county's share of regional employment (53%) was larger than its share of the regional population (47%). For the other counties, the share of regional employment was 1% to 2% smaller than its share of the regional population.

**Figure III-10.**  
**Total Employment by County, Northeast Region, Counties, 2010 to 2022**



Source: Quarterly Census of Employment and Wages and Root Policy Research.

The three largest industries in the Northeast Region by employment are Education & Health Services (21% of total jobs); Trade, Transportation, & Utilities (20% of total jobs); and Natural Resources & Mining (15% of total jobs).

Figures III-11 to III-15 provide a detailed overview of employment within each county of Wyoming's Northeast Region. Figures are presented in the order of highest to lowest total employment.

As shown in Figure III-11, total employment in Campbell county fell by 14% (-3,691 jobs) between 2010 and 2022. In 2022 as in 2010, Campbell county's two largest industries by employment are Natural Resources & Mining (5,540 jobs) and Trade, Transportation, & Utilities (4,875 jobs). Between 2010 and 2022, Education & Health Services surpassed Construction to become the county's third largest sector by employment.

Employment within the Education & Health Services industry experienced the largest total growth (+604 jobs), followed by Leisure & Hospitality (+438 jobs). Natural Resources & Mining (-2,420 jobs) and Construction (-1,665 jobs) experienced the greatest job losses. Taken together, these changes indicate that the economy of Campbell county, the largest county in the region by employment and by population, has become less goods-oriented and more service-oriented. Recalling Figures III-5 and III-6, Campbell county drove a negative net migration for the Region in 2016 and 2017 and experienced migration-driven income decreases likely due to the Natural Resources & Mining industry's reaction to falling energy prices in these years.

**Figure III-11.**  
**Employment by Industry, Campbell County, 2010 and 2022**

Campbell County	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
Goods Producing	12,029	7,897	-4,132	-34%
Natural Resources & Mining	7,924	5,504	-2,420	-31%
Construction	3,593	1,928	-1,665	-46%
Manufacturing	512	465	-47	-9%
Service Providing	15,555	15,726	171	1%
Trade, Transportation, & Utilities	5,125	4,875	-250	-5%
Information	210	244	34	16%
Financial Activities	697	699	2	0%
Professional & Business Services	1,744	1,568	-176	-10%
Education & Health Services	3,496	4,100	604	17%
Leisure & Hospitality	2,016	2,454	438	22%
Other Services	878	694	-184	-21%
Public Administration	1,389	1,092	-297	-21%
All Industries	27,584	23,623	-3,961	-14%

Source: Quarterly Census of Employment and Wages and Root Policy Research.

Figure III-12 below shows employment in Sheridan county, the second largest county in the Northeast Region in terms of population and employment. Total employment in Sheridan county grew by 940 jobs, or 8%, between 2010 and 2022.

In both 2010 and 2022, Sheridan county's three largest sectors by employment are Education & Health Services (3,905 jobs), Trade, Transportation, & Utilities (2,448 jobs), and Leisure & Hospitality (1,618 jobs). Employment within the Manufacturing industry experienced the largest total growth (+585 jobs, a 230% growth), followed by Construction (+240 jobs). The greatest job losses took place in the Natural Resources & Mining industry (-331 jobs). The 25% growth in the Goods Producing sector of Sheridan county's economy is due to growth in Construction and Manufacturing which outweighed the contraction of the Natural Resources & Mining industry.

**Figure III-12.**  
**Employment by Industry, Sheridan County, 2010 and 2022**

Sheridan County	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
Goods Producing	1,953	2,446	493	25%
Natural Resources & Mining	615	284	-331	-54%
Construction	1,084	1,324	240	22%
Manufacturing	254	839	585	230%
Service Providing	10,519	10,966	447	4%
Trade, Transportation, & Utilities	2,456	2,448	-8	0%
Information	182	161	-21	-12%
Financial Activities	575	695	120	21%
Professional & Business Services	916	1,147	231	25%
Education & Health Services	3,689	3,905	216	6%
Leisure & Hospitality	1,655	1,618	-37	-2%
Other Services	434	451	17	4%
Public Administration	612	541	-71	-12%
All Industries	12,472	13,412	940	8%

Source: Quarterly Census of Employment and Wages and Root Policy Research.

Figure III-13 below shows employment details for Johnson county. Across the time studied, total employment in the county increased by 2%, or 63 jobs. Alongside this job growth, the county saw a positive net migration of around 5% between 2011 and 2021.

In both 2010 and 2022, Johnson county's three largest sectors by employment were Leisure & Hospitality (561 jobs); Trade, Transportation, & Utilities (517 jobs); and Public Administration (320 jobs). Over the time studied, the Professional & Business Services industry and the Manufacturing industry added the most jobs, at +58 and +40 new jobs, respectively. The greatest jobs losses were experienced by the Construction industry (-75 jobs).

**Figure III-13.**  
**Employment by Industry, Johnson County, 2010 and 2022**

Johnson County	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
Goods Producing	563	558	-5	-1%
Natural Resources & Mining	214	243	29	14%
Construction	305	230	-75	-25%
Manufacturing	45	85	40	89%
Service Providing	2,050	2,118	68	3%
Trade, Transportation, & Utilities	538	517	-21	-4%
Information	37	40	3	8%
Financial Activities	157	125	-32	-20%
Professional & Business Services	154	212	58	38%
Education & Health Services	195	224	29	15%
Leisure & Hospitality	530	561	31	6%
Other Services	109	119	10	9%
Public Administration	330	320	-10	-3%
All Industries	2,613	2,676	63	2%

Source: Quarterly Census of Employment and Wages and Root Policy Research.

As shown in Figure III-14 below, total employment in Crook county grew by 11% (+248 jobs) between 2010 and 2022, explaining the county's positive net migration across the time studied. In 2022 and in 2010, Crook county's three largest industries by employment are Education & Health Services (545 jobs), Natural Resources & Mining (400 jobs) and Trade, Transportation, & Utilities (396 jobs). The largest total job growth took place in the Natural Resources & Mining industry (+98 jobs) and the Professional and Business Services industry (+69 jobs). The most significant job loss took place in the Public Administration industry (-18 jobs).



**Figure III-14.**  
**Employment by Industry, Crook County, 2010 and 2022**

Crook County	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
Goods Producing	666	863	197	30%
Natural Resources & Mining	302	400	98	32%
Construction	200	245	45	23%
Manufacturing	164	217	53	32%
Service Providing	1,581	1,632	51	3%
Trade, Transportation, & Utilities	396	396	0	0%
Information	15	N/A	N/A	N/A
Financial Activities	61	63	2	3%
Professional & Business Services	68	137	69	101%
Education & Health Services	554	545	-9	-2%
Leisure & Hospitality	271	299	28	10%
Other Services	36	30	-6	-17%
Public Administration	180	162	-18	-10%
All Industries	2,247	2,495	248	11%

Note: Data are unavailable for categories marked "N/A". In accordance with BLS policy, data are reported under a promise of confidentiality and are published in a way so as to protect the identifiable information of reporters. BLS withholds the publication employment and wage data for any industry level when necessary to protect the identity of employers.

Source: Quarterly Census of Employment and Wages and Root Policy Research.

As shown in Figure III-15 below, total employment in Weston county increased by 92 jobs, or 4%. In both 2010 and 2022, the three largest sectors of the economy are Education & Health Services (644 jobs), Trade, Transportation, & Utilities (461 jobs), and Natural Resources & Mining (241 jobs). The largest total job growth took place in the Natural Resources & Mining industry (+66 jobs), while the most significant job loss took place in the Leisure & Hospitality Industry (-36 jobs).

**Figure III-15.**  
**Employment by Industry, Weston County, 2010 and 2022**

Weston County	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
Goods Producing	468	547	79	17%
Natural Resources & Mining	175	241	66	38%
Construction	173	N/A	N/A	N/A
Manufacturing	120	N/A	N/A	N/A
Service Providing	1,639	1,652	13	1%
Trade, Transportation, & Utilities	413	461	48	12%
Information	36	25	-11	-31%
Financial Activities	79	66	-13	-16%
Professional & Business Services	58	74	16	28%
Education & Health Services	635	644	9	1%
Leisure & Hospitality	219	183	-36	-16%
Other Services	36	44	8	22%
Public Administration	163	155	-8	-5%
All Industries	2,107	2,199	92	4%

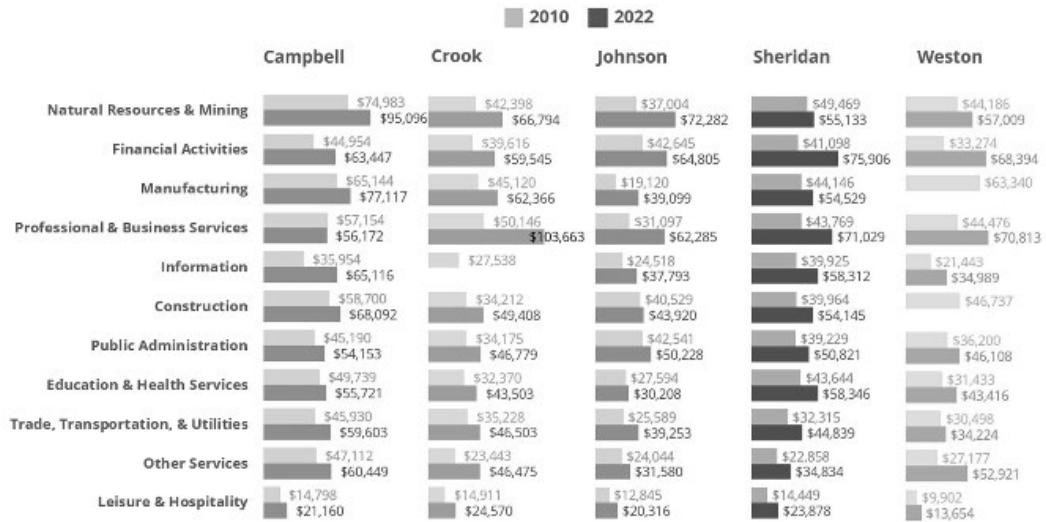
Note: Data are unavailable for categories marked "N/A." In accordance with BLS policy, data are reported under a promise of confidentiality and are published in a way so as to protect the identifiable information of reporters. BLS withholds the publication employment and wage data for any industry level when necessary to protect the identity of employers.

Source: Quarterly Census of Employment and Wages and Root Policy Research.

Collectively, the Northeast Region saw a 750-job increase in Service Providing jobs and a 3,368-job decrease in Goods Producing jobs, indicating that the Region's decline in employment since 2010 results from a decline in employment in Goods Producing industries.

**Wages.** Figure III-16 shows average annual wages by industry for each county in Wyoming's Northeast Region. Between 2010 and 2022, average annual wages grew for each industry where data are available in each county of the Region except for Campbell county's Professional & Business Services industry. The Natural Resources & Mining industry has the highest average annual wages of any industry in Campbell and Johnson counties. The Professional & Business Services industry has the highest average annual wages of any industry in Crook and Weston counties. In Sheridan county, the Financial Activities industry had the highest average annual wages.

Figure III-16.  
Average Annual Wages by Industry, Northeast Region, Counties, 2010 and 2022



Note: Data are unavailable for categories without bars shown.  
Source: Quarterly Census of Employment and Wages and Root Policy Research.

## Housing Market Trends

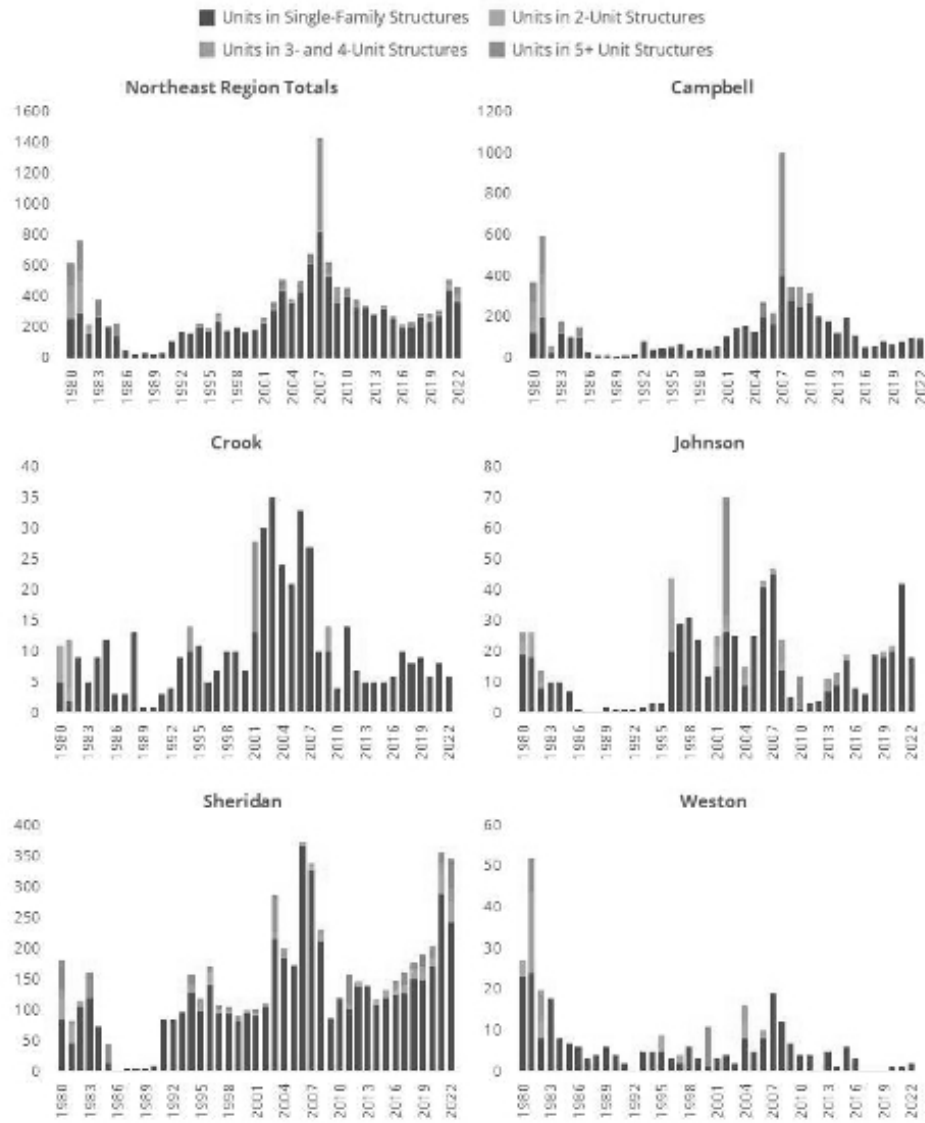
**Residential building permits.** Residential building permits in Wyoming's Northeast Region have been dominated by units in single-family structures. Around 79% of units permitted in the Northeast Region since 1980 are units in single-family structures and around 12% are units in multifamily structures of 5 units or more. Units in 2-unit structures account for 5% of units permitted, and units in 3- and 4-unit structures account for 4% of units permitted.

Figure III-17 below shows trends in residential building permits for the Northeast Region and each of its counties. Please note that scale differs in each geography's section of the figure based on total permits issued.

The Northeast Region and each of its counties saw relatively high volumes of building permits issued in the early 1980s before experiencing a significant drop in permits issued with the 1980s recession. The 2008 recession caused another significant drop in permits issued. Permitting levels continued to decline until the mid-2010s before gradually increasing through the early 2020s.

The highest volume of multifamily development (as indicated by building permits issued) over this period took place in Campbell county, the region's largest county, and was concentrated in the mid-2000s before the 2008 recession.

**Figure III-17.**  
**Building Permits by Units in Structure, Northeast Region, Counties, 1980-**  
**2022**



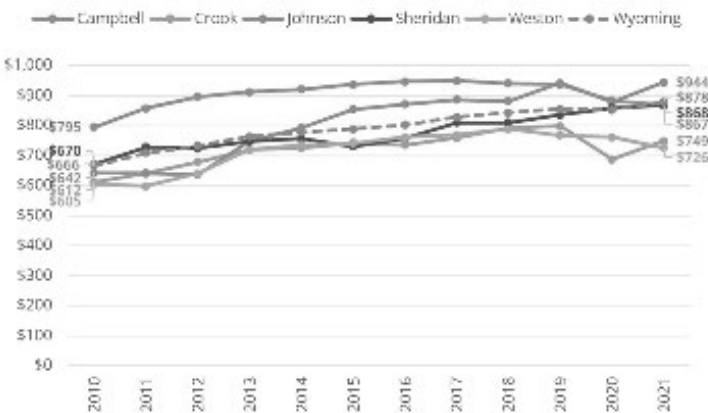
Source: U.S. Census Building Permits Survey and Root Policy Research.

**Median rent.** Figure III-18 shows trends in median gross rent for the state of Wyoming and counties in the Northeast Region. Wyoming and each Northeast Region county experienced a growth in median gross rents between 2010 and 2021. Johnson county saw the most significant rise in median rent (+\$302, or +47%) over the time studied. As of 2021, Johnson county has the highest median gross rent in the Northeast Region (\$944), while Weston county has the lowest (\$726).

In each year studied, median gross rent in Weston and Crook counties was lower than median gross rent for Wyoming. Sheridan county's median gross rent closely tracked that of Wyoming and exceeded it only in 2010, 2011, and 2022. Johnson and Campbell counties' median gross rents exceeded that of Wyoming for most years studied.

**Figure III-18.**  
**Median Gross Rent, Wyoming and Northeast Region, Counties, 2010-2021**

Source:  
2010-2021 5-year ACS and  
Root Policy Research.



The median rent data shown above reflects rents for all rental units until 2021 according to ACS estimates. Additional detail for 2023 year-to-date median rents in units in structures containing five or more housing units is available in the table below. As data are not available for all multifamily units in each county, the final column in the table specifies the number of units reflected in the median rent estimate.

**Figure III-19.**  
**Multifamily Median Rent, Northeast Region, Counties, 2023 YTD**

Note:  
Multifamily units are defined as units in buildings of 5+ units. No data are available for multifamily units in Crook county.

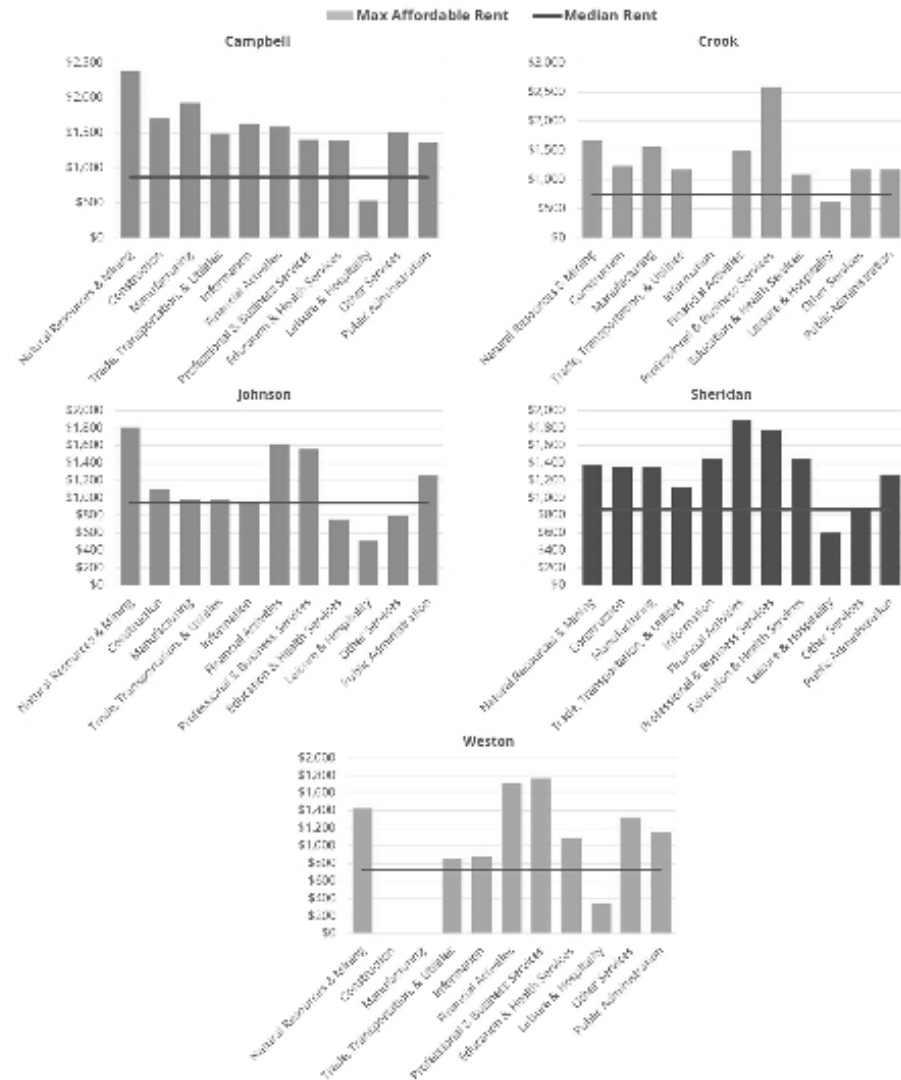
Source:  
CoStar and Root Policy Research.

	Median Rent	Units Included
Campbell	\$931	1,610
Crook	N/A	0
Johnson	\$405	30
Sheridan	\$677	400
Weston	\$1,068	24

**Housing affordability by industry.** The federal government considers housing to be affordable when housing cost—the rent or mortgage payment plus taxes, utilities, mortgage, insurance, and HOA fees—consumes 30% or less of a household's gross income. Households spending more than 30% of their gross income are cost burdened.

Figures III-20 and III-21 below show housing affordability for the Northeast Region's workforce by comparing median rent and median home sales prices with rental and ownership affordability thresholds for individuals earning the average annual wages of industries in each county. As shown in Figure III-20, median rent is affordable to individuals earning average wages for most industries with data available. Median rent is not affordable to average wage earners in the Leisure & Hospitality industry in all Northeast Region counties (which accounts for 12% of the Region's employment) and Education & Health Services and Other Services in Johnson county.

**Figure III-20**  
**Rental Affordability by Industry, Northeast Region, Counties, 2021/22**



Note: Affordability estimates assume families spend no more than 30% of their income on housing. Data are unavailable for categories without bars shown. Max affordable rent estimates are based on 2022 average wage data, while median rent estimates are based on 2021 data.

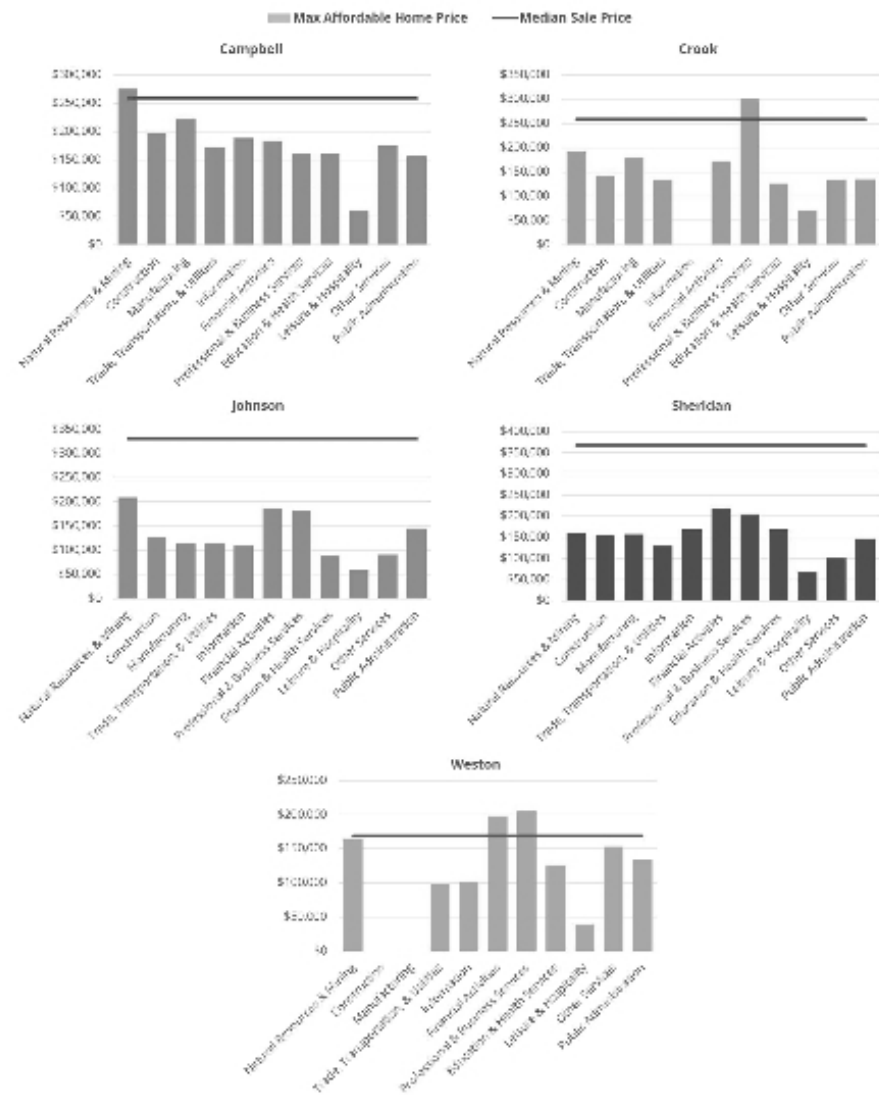
Source: Quarterly Census of Employment and Wages, 2021 5-year ACS, and Root Policy Research.



Figure III-21 below shows home purchase affordability by industry. Homeownership is significantly less affordable for each industry's workforce than home rental is. Individuals earning the average wage for any industry in Johnson and Sheridan counties cannot afford to buy a home at their counties' median home sales price. Median priced homes are affordable to average wage earners in Campbell county's Natural Resources & Mining industry, Weston county's Financial Activities industry, and Crook and Weston Counties' Professional & Business Services industries.

Altogether, supposing that all employees earn the average wage for their industry in their county, 13% of the Northeast Region's workforce can afford to purchase a median-priced home in their county. Campbell county's Natural Resources & Mining industry accounts for over 95% of the population for whom median-priced homes are affordable to average wage earners, but this industry lost over 30% of its total employment between 2010 and 2021.

**Figure III-21.**  
**Purchase Affordability by Industry, Northeast Region, Counties, 2022**



Note: Affordability estimates assume a household spends 30% of its income on housing and assume a 30-year mortgage with a 7% interest rate, a 10% down payment, and 30% of monthly payment to property taxes, utilities, and insurance. Data are unavailable for categories without bars shown.

Source: Quarterly Census of Employment and Wages, Assessor data by the Wyoming Department of Revenue, and Root Policy Research.

**Rental vacancy.** Figure III-22 below shows 2023 rental vacancy rates for counties in Wyoming's Northeast Region.<sup>3</sup> As data are not available for all multifamily units in each county, the final column in the table specifies the number of units reflected in the vacancy rate estimate. According to 2023 estimates, Campbell and Sheridan counties have rental vacancy rates below the 5% considered healthy for the rental market, while Crook, Weston and Johnson counties have rental vacancy rates higher than the ideal 5% rate.

**Figure III-22.**  
**Multifamily Rental Vacancy Rate,**  
**Northeast Region, Counties, 2023**  
**YTD**

**Note:**

Rate for Crook comes from the Wyoming Rental Vacancy Survey. CoStar Multifamily units are defined as units in buildings of 5+ units. No data are available for multifamily units in Crook county.

**Source:**

CoStar, C&P Advisors Wyoming Rental Vacancy Survey, and Root Policy Research.

	Multifamily Vacancy Rate	Units Included
Campbell	3.0%	2,898
Crook	7.7%	52
Johnson	8.3%	146
Sheridan	3.5%	900
Weston	7.2%	34

**Mortgage loan activity.** Home Mortgage Disclosure Act (HMDA) data include information about loan originations and can be analyzed to understand shifts in home purchase activity by location, home value, occupancy type, and other factors. HMDA data only include home purchases that made use of a mortgage; home purchases made in cash, without a mortgage, are not included in the data. Therefore, the following estimates undercount both the total volume of home purchases and the number of homes that were purchased as second homes or investment properties.

Figure III-23 shows the volume of home loan originations by county in the Northeast Region from 2018 to 2022. The Northeast Region experienced a relatively low volume of home purchase loan originations in 2018 and 2019. Mortgage originations rose with low interest rates during the COVID-19 pandemic in 2020 and 2021. Mortgage originations fell nearly to pandemic-era levels alongside steep increases in interest rates in 2022.

<sup>3</sup> Vacancy data come from two sources: 1. Commercial real estate market analytics firm CoStar provides rental vacancy rates. CoStar collects data on vacancy rates for multifamily rental developments containing five or more units at the development level and aggregates these data to provide estimates at different geographic levels. 2. The Wyoming Rental Vacancy Survey (WRVS) which was undertaken on behalf of the Wyoming Community Development Authority, beginning in July 2023. The survey was designed to collect information regarding rentals throughout the State of Wyoming. Data were collected through systematic online data collection and telephone survey. In places where the coverage of this survey was higher than CoStar coverage, data from this survey were used instead.

As of 2022, Campbell and Sheridan counties, the two largest counties in the Region by population, account for the largest shares of the Region's home purchase loan originations at 50% and 33% respectively.

Campbell county's share of the Region's total loan originations rose from 45% to 50% between 2018 and 2022. With a population accounting for 47% of the regional population, Campbell county's share of home loan originations is outsized relative to its population. Sheridan county's share of home loan originations (33%) is also outsized relative to its share of the regional population (31%).

**Figure III-23.**  
**Home Loan**  
**Originations,**  
**Northeast Region,**  
**Counties, 2018-**  
**2022**

Note:  
Includes first lien loan  
originations only.

Source:  
HMDA and Root Policy  
Research.

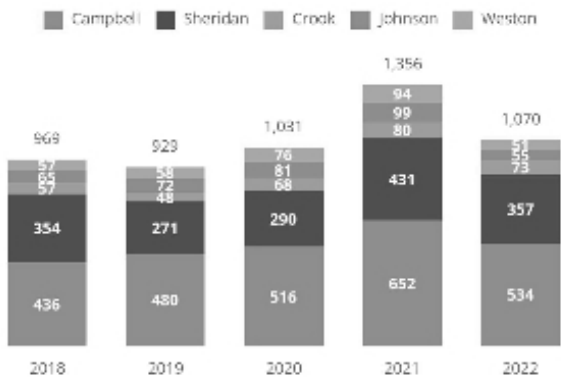


Figure III-24 shows trends in the median home value for originated home purchase loans for each county in the Northeast Region and for Wyoming. The median home value for originated home purchase loans has increased overall since 2018 in each county of the Region. As of 2022, the median home value for originated home purchase loans is greater in Sheridan, Johnson, and Crook counties than in Wyoming. These three counties also experienced the largest growths in median home value for originated loans.

**Figure III-24.  
Median Home  
Value for  
Originated Home  
Purchase Loans,  
Northeast  
Region, Counties,  
2018-2022**

Note:  
Includes first lien loan  
originations only.

Source:  
HMDA and Root Policy  
Research.

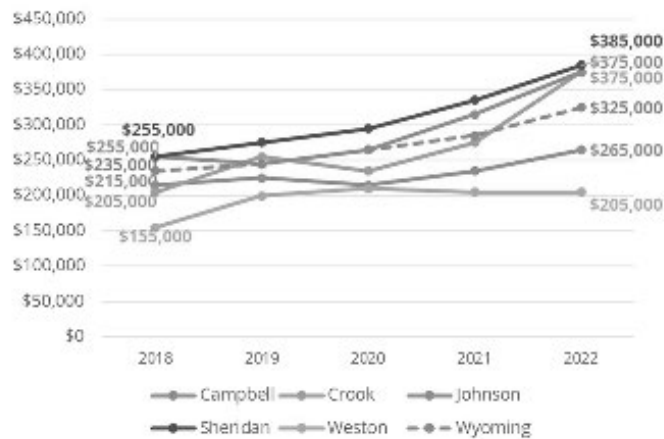


Figure III-25 shows trends in property values for originated home purchase loans by occupancy type between 2018 and 2022. In 2022, in the Northeast Region overall, investment properties had the lowest median value (\$195,000), followed by principal residences (\$315,000) and second residences (\$355,000). Investment properties had lower median values than principal residences in Campbell county in 2022 and in Sheridan county in 2018. Data are not available for second residences and investment properties in most counties due to too few loan originations for these occupancy categories.

Median values for principal residences in Crook, Johnson, and Sheridan counties were lower than those for principal residences in the Northeast Region in 2022, while median values for principal residences in Campbell and Weston counties were lower than those in the Region. Investment properties in Campbell county had a lower median value than those in the Northeast Region in 2022.

In the Northeast Region, values of principal residences appreciated at a higher rate (44%) than those for second residences (27%) and investment properties (5%). Principal residences appreciated in value at rates higher than those for the Region in Crook, Johnson, and Sheridan counties, while principal residences in Campbell and Weston counties appreciated at rates slower than those for the Region.

**Figure III-25.**  
**Median Home Value for Originated Home Purchase Loans by Occupancy**  
**Type, Northeast Region, Counties, 2018-2022**

	Median Property Value		2018-2022 Change	
	2018	2022	Amount	Percent
<b>Campbell</b>				
Principal residence	\$215,000	\$265,000	\$50,000	23%
Second residence	-	-	-	-
Investment property	-	\$170,000	-	-
<b>Crook</b>				
Principal residence	\$205,000	\$385,000	\$180,000	88%
Second residence	-	-	-	-
Investment property	-	-	-	-
<b>Johnson</b>				
Principal residence	\$225,000	\$375,000	\$150,000	67%
Second residence	-	-	-	-
Investment property	-	-	-	-
<b>Sheridan</b>				
Principal residence	\$255,000	\$385,000	\$130,000	51%
Second residence	-	-	-	-
Investment property	\$195,000	-	-	-
<b>Weston</b>				
Principal residence	\$155,000	\$205,000	\$50,000	32%
Second residence	-	-	-	-
Investment property	-	-	-	-
<b>Northeast Region</b>				
Principal residence	\$225,000	\$315,000	\$90,000	40%
Second residence	\$280,000	\$355,000	\$75,000	27%
Investment property	\$185,000	\$195,000	\$10,000	5%

Note: Includes first lien loan originations only. Data are omitted for categories with fewer than 20 sales.

Source: HMDA and Root Policy Research.

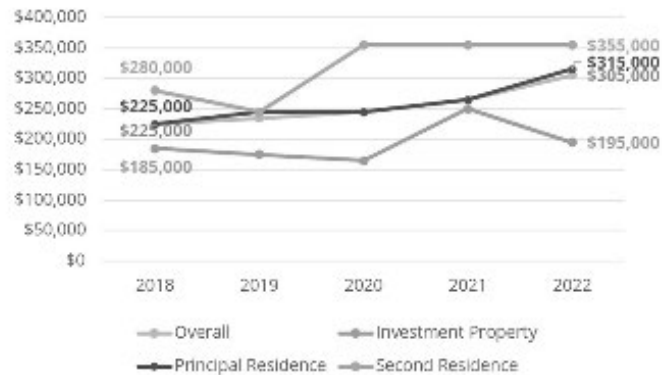
Trends in home value by occupancy type for the Northeast Region are further illustrated in Figure III-26. Between 2018 and 2022, principal residences saw the largest rise in median value (+\$90,000), followed by second residences (+\$75,000). Because over 90% of home

loan originations in the Northeast Region are for principal residences, median values for home loan originations overall closely track those for principal residences.

**Figure III-26.**  
**Median Home**  
**Value by**  
**Occupancy Type,**  
**Northeast Region,**  
**2018-2022**

Note:  
Includes first lien loan  
originations only.

Source:  
HMDA and Root Policy  
Research.

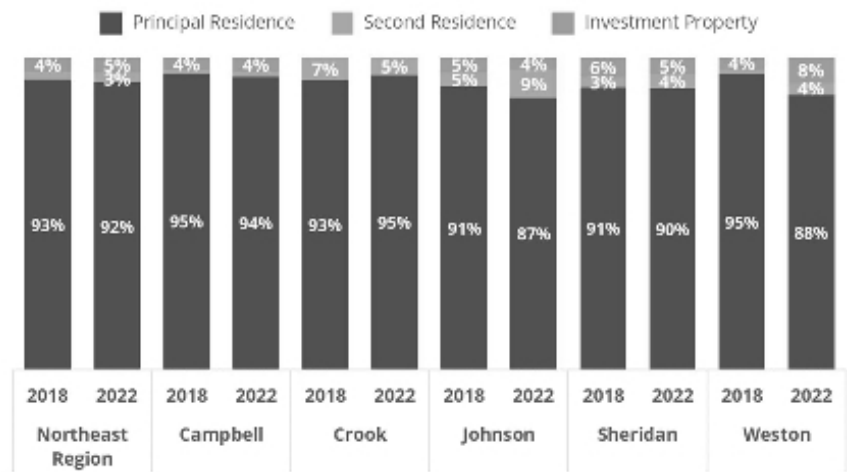


Sheridan county accounts for the second greatest share of total home loan originations (33%, down from 37% in 2018) and for the greatest share of the Northeast Region's loan originations for second residences (44%, down from 50% in 2018).

Crook county accounts for 7% of the Region's total home loan originations (up from 6% in 2018), while Johnson and Weston counties account for the Region's smallest shares of home loan originations at 5% each.

Figure III-27 shows the composition of total loan originations by occupancy type for the Northeast Region and each of its counties between 2018 and 2022. In 2018, principal residences accounted for at least 91% of total loan originations in each county. Between 2018 and 2022, the Northeast Region saw a slight decrease in the share of loan originations for principal residences, accompanied by commensurate increases in the share of loan originations for second residences and investment properties. In 2022, principal residences accounted for at least 87% of total home loan originations in each county. As of 2022, investment properties account for the second largest shares of loan originations in the Northeast Region and in Campbell, Sheridan, and Weston counties. In Crook and Johnson counties, second residences account for the second largest shares of loan originations.

**Figure III-27.**  
**Distribution of Home Purchase Loan Originations by Occupancy Type and County, 2018 and 2022**



Note: Includes first lien originations only. 1% and 2% values are not labeled.  
Source: HMDA and Root Policy Research.

**Home sales.** Assessor data from Wyoming’s Department of Revenue details home sales for single-family homes on ten acres or less for each county in Wyoming.

Figure III-28 shows the median sales price for housing units sold in Wyoming’s Northeast Region in 2022. The median price for all housing units in the Region was \$285,000. Campbell, Crook, and Weston counties had median sales prices below the regional median. Weston county had the lowest median sales price in the Region at \$169,000. Johnson and Sheridan counties had median sales prices higher than that of the Region at \$330,000 and \$366,995, respectively.

In the Northeast Region, single family homes had the highest median price of any home type at \$312,000. Modular and mobile homes had the second highest median price at \$250,000, while duplexes had the third highest median price at \$189,900. Townhomes and condos had the lowest median price at \$170,000. Median sales prices for homes in Campbell county followed this pattern with lower median prices for single family homes and townhomes and condos.



**Figure III-28.**  
**Median Home Sales Price by Structure Type, Northeast Region, Counties,**  
**2022**

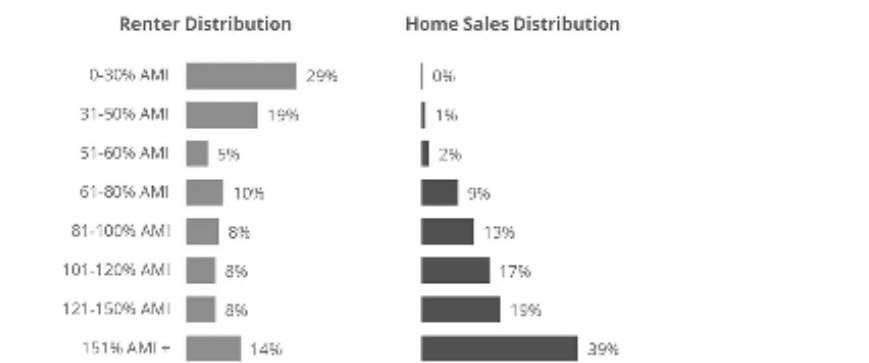
	Median Sales Price				
	All Units	Single Family	Duplex	Townhome/ Condo	Modular/ Mobile Home
<b>Northeast</b>	\$285,000	\$312,500	\$189,900	\$170,000	\$250,000
<b>Campbell</b>	\$259,000	\$279,900	\$189,900	\$160,450	\$250,000
<b>Crook</b>	\$259,000	\$259,000	N/A	N/A	N/A
<b>Johnson</b>	\$330,000	\$330,000	N/A	N/A	N/A
<b>Sheridan</b>	\$366,995	\$372,000	N/A	N/A	N/A
<b>Weston</b>	\$169,500	\$165,000	N/A	N/A	N/A

Note: Data are omitted for categories with fewer than 20 sales.

Source: Assessor data by the Wyoming Department of Revenue.

Figure III-29 below shows the distribution of renters and home sales by Area Median Income (AMI). The renter distribution presents the distribution of renter incomes by AMI range, while the home sales distribution presents the distribution of homes sold affordable to households with such income levels without being cost burdened. While around 48% of the Northeast Region's renters have incomes below 50% AMI, 1% of the homes sold in 2022 were affordable to individuals in this price range. 71% of the Northeast Region's renters have incomes below 100% AMI, while 75% of homes sold in 2022 were unaffordable to individuals earning less than 100% AMI.

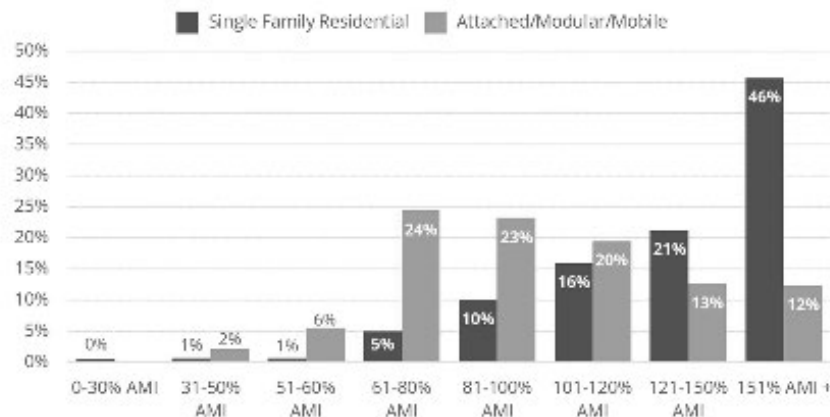
**Figure III-29.**  
**Renter and Affordable Home Sales Distribution by AMI, Northeast Region**



Note: Affordability estimates assume that a household spends 30% of their income on housing and assume a 30-year mortgage with a 7% interest rate, a 10% down payment, and 30% of monthly payment to property taxes, utilities, and insurance.  
 Source: 2021 5-year ACS, Assessor data by the Wyoming Department of Revenue, and Root Policy Research.

Figure III-30 displays the shares of total single family homes and attached, modular, and mobile homes sold in 2022 that were affordable to buyers in each AMI range. While single family homes are concentrated in the higher affordability ranges, a greater share of attached, modular, and mobile homes are affordable to low to moderate income households. It is important to note that the region’s housing stock is dominated by single family homes, so low to moderate income buyers interested in purchasing attached, modular, or mobile homes in their price ranges face significant supply constraints.

**Figure III-30.**  
**Home Sales Distribution by AMI and Unit Type, Northeast Region, 2022**



Note: Affordability estimates assume that a household spends 30% of their income on housing and assume a 30-year mortgage with a 7% interest rate, a 10% down payment, and 30% of monthly payment to property taxes, utilities, and insurance.

Source: Assessor data by the Wyoming Department of Revenue and Root Policy Research.

## Housing Problems

**Cost burden.** The federal government, and most housing programs, consider housing as affordable when the housing payment—the rent or mortgage payment, plus taxes and utilities—consumes 30% or less of a household’s gross income. Households who pay more than 30% are “cost burdened.” This standard is derived from historically typical mortgage lending requirements and is also applied to renters.

Households experiencing cost burden have less money to spend on other essentials like healthcare, education, groceries, and transportation—adversely affecting their household well-being, limiting their economic growth potential, and constraining local spending.

Figure III-31 shows the shares of renters and owners in Wyoming, the Northeast Region, and each Northeast Region county who experienced cost burden in 2010 and 2021. In 2021, in each area studied, renters face cost burden at higher rates than homeowners do.

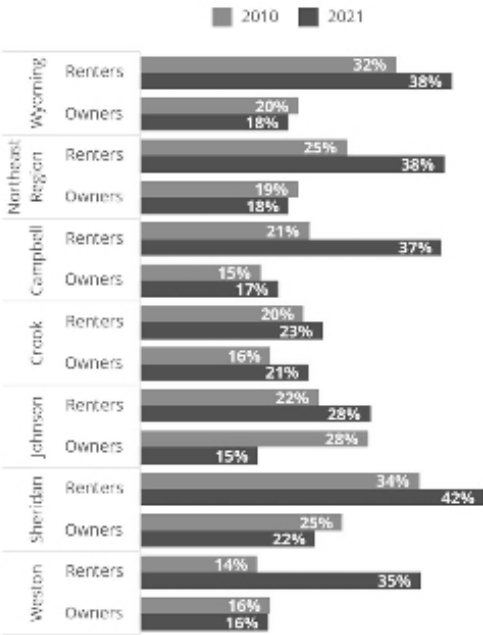
Between 2010 and 2021, the share of Wyoming renters experiencing cost burden rose by six percentage points from 32% to 38%, while the share of Wyoming homeowners experiencing cost burden decreased by two percentage points from 20% to 18%. At the same time, the share of Northeast Region renters experiencing cost burden increased by thirteen percentage points from 25% to 38%, while the share of the Region’s homeowners experiencing cost burden decreased by one percentage point. As of 2021, renters and

owners in the Northeast Region experience cost burden at the same rates as renters and owners in Wyoming.

As of 2021, renters in Sheridan county experience cost burden at the highest rate in the region (42%), while renters in Crook county face cost burden at the lowest rate in the region (23%). Homeowners in Sheridan county have the highest rate of cost burden in the region (22%), and homeowners in Johnson county have the lowest rate of cost burden in the region (15%).

**Figure III-31.**  
**Cost Burden by Tenure,**  
**Wyoming, Northeast**  
**Region, Counties, 2010**  
**and 2021**

Source:  
2010 and 2021 5-year ACS estimates and  
Root Policy Research.



**Overcrowding.** Housing units are considered overcrowded when they are occupied by more than one person per room. Figure III-32 illustrates the rate of overcrowding by tenure for Wyoming, the Northeast Region, and the counties of the Northeast Region.

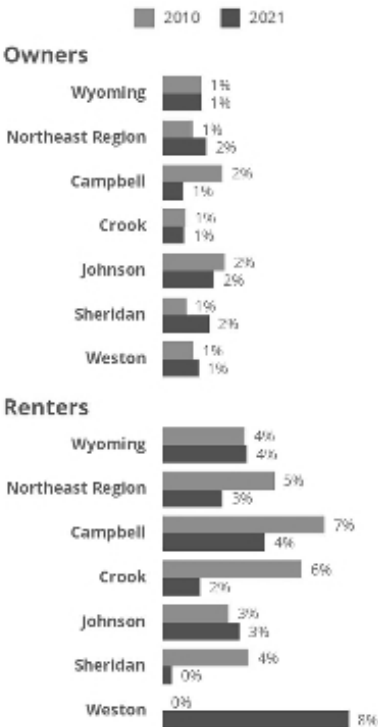
As of 2021, renter households experience overcrowding at four times the rate of owner households in Wyoming and at greater rates than owner households in Campbell, Crook, Johnson, and Weston counties. Only in Sheridan county do owner households experience overcrowding at higher rates than renter households.

Overcrowding has been stable overall for Wyoming's owner and renter households between 2010 and 2021. Over the same time, overcrowding has increased slightly for

owner households in the Northeast Region and decreased for renter households in the Northeast Region. Over the time studied, overcrowding increased for owners in Sheridan and Weston counties and for renters in Johnson and Weston counties.

**Figure III-32.**  
**Overcrowding by Tenure,**  
**Wyoming, Northeast**  
**Region, Counties, 2010**  
**and 2021**

Source:  
ACS 2021 5-year estimates and Root Policy  
Research.



**Short Term Rental Market**

Short-term rentals, or STRs, play a unique role within housing markets, especially those with a large tourism industry, as they can provide economic benefit (to homeowners through rental revenue and the City through sales tax/tourism revenue) but may disrupt the long-term rental market if they account for a substantial portion of the total housing stock.

**Johnson County and Buffalo.** According to data from AirDNA (a market analytics website for short term rentals), there are 102 homes listed as short-term rentals (STRs) in

Buffalo<sup>4</sup> and 107 STRs in Johnson county<sup>5</sup>. Buffalo's STR units, which may be active or inactive at the time of reporting, account for 2.6% of its total housing stock<sup>6</sup>. Figure III-33 below maps the volume of STRs in Johnson county's ZIP Codes. Almost all STRs in Johnson county are located within Buffalo's ZIP Code, 82834.

**Figure III-33.**  
**Short Term Rental**  
**Units by ZIP Code,**  
**Johnson County**  
**and Buffalo, 2023**

**Note:**

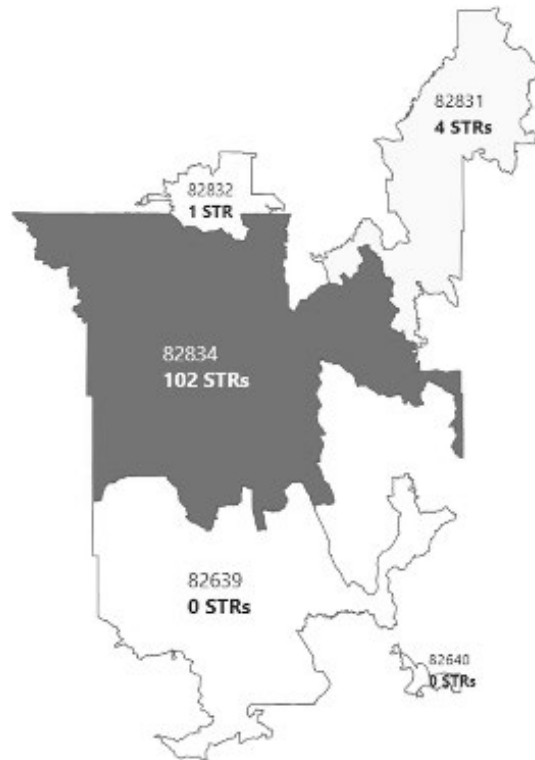
Johnson county as presented in this section consists of the following ZIP Codes: 82834, 82639, 82832, 82831, 82640, and 82840.

The city of Buffalo is defined as the ZIP Code 82834.

This map uses ZIP Code Tabulation Areas (ZCTAs) from the U.S. Census Bureau to approximate ZIP Code boundaries. ZCTAs do not exist for uninhabited areas or areas with very few addresses. ZIP Codes without corresponding ZCTAs have not been mapped.

**Source:**

AirDNA.com



<sup>4</sup> AirDNA.com provides market analytics for STRs by ZIP Code. ZIP Code boundaries do not entirely align with city or county boundaries. In this section, Buffalo is represented by its main ZIP Code, 82834.

<sup>5</sup> Because some ZIP Codes cross county lines, it is not possible to provide an exact picture of the STR market in Johnson county. The Johnson county presented in this section consists of the following ZIP Codes: 82834, 82639, 82832, 82831, 82640, and 82840.

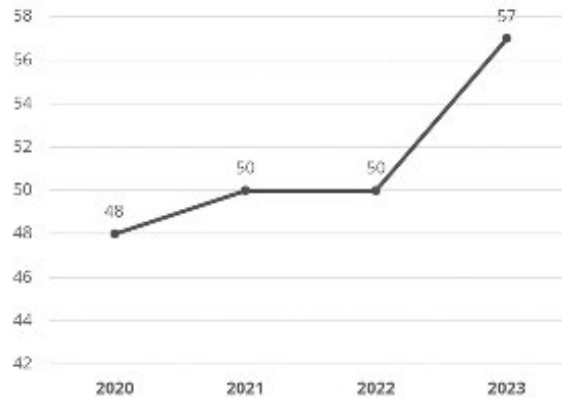
<sup>6</sup> According to 2022 5-year ACS estimates, there are 3,928 housing units in the 82834 ZIP Code Tabulation Area.

Figure III-34 below demonstrates the overall increase in the number of active STRs in Johnson county in November, 2020-2023. Note that STR activity is seasonal, with higher activity typically observed in the summer months.

**Figure III-34.**  
**Active Short Term**  
**Rental Units,**  
**Johnson County,**  
**2020-2023**

Note:  
Counts reflect units available in  
November of each year.  
Johnson county as presented in this  
section consists of the following ZIP  
Codes: 82834, 82639, 82832, 82831,  
82640, and 82840.

Source:  
AirDNA.com

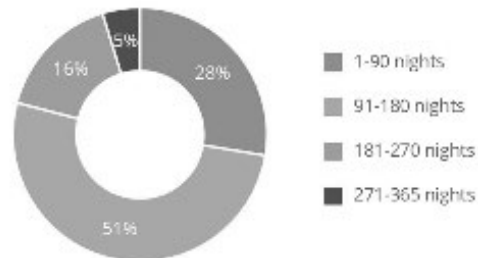


As shown in Figure III-35, 79% of short term rentals in Johnson county are available for fewer than 180 nights per year. These are considered part-time STRs, some of which may be permanently occupied and rented occasionally, and others of which may be rented consistently and otherwise vacant or used seasonally. Coupled with the fact that STR units, active and inactive, account for 2.6% of Buffalo's total housing stock, this suggests that STR units are unlikely to meaningfully affect housing supply in Johnson county.

**Figure III-35.**  
**Short Term Rental**  
**Units by Annual**  
**Availability, Johnson**  
**County, 2023**

Note:  
Johnson county as presented in this  
section consists of the following ZIP  
Codes: 82834, 82639, 82832, 82831,  
82640, and 82840.

Source:  
AirDNA.com



According to AirDNA.com, 84% of STRs in Johnson county are entire homes and 16% are private rooms. Figure III-36 below shows the distribution of STRs by number of bedrooms. 41% of STRs in the county have 1 bedroom, 38% have 2 bedrooms, 10% have 3 bedrooms, 9% have 4 bedrooms, and 2% have 5 or more bedrooms.

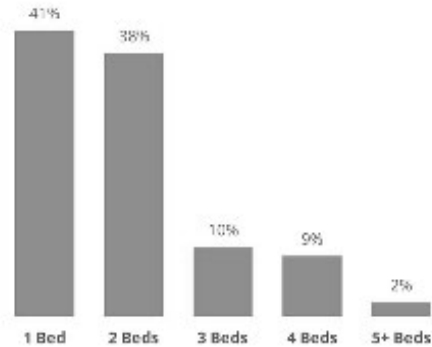
**Figure III-36.  
Short Term Rental  
Units by Number of  
Bedrooms, Johnson  
County, 2023**

Note:

Johnson county as presented in this section consists of the following ZIP Codes: 82834, 82639, 82832, 82831, 82640, and 82840.

Source:

AirDNA.com



**Sheridan County and Sheridan.** Sheridan county is home to Sheridan, a popular tourist destination. According to data from AirDNA.com (a market analytics website for short term rentals), there are 177 homes listed as short-term rentals (STRs) in Sheridan<sup>7</sup> and 369 STRs in Sheridan county<sup>8</sup>. Sheridan's STR units, which may be active or inactive at the time of reporting, account for only 1.5% of its total housing stock<sup>9</sup>.

Figure III-37 below maps the volume of STRs in Sheridan county's ZIP Codes. Most STRs in Sheridan county are located within Sheridan's main ZIP Code, 82801, though there is also a significant concentration in 82832, the ZIP Code containing the town of Banner.

<sup>7</sup> AirDNA.com provides market analytics for STRs by ZIP Code. ZIP Code boundaries do not entirely align with city or county boundaries. In this section, Sheridan is represented by its main ZIP Code, 82801.

<sup>8</sup> Because some ZIP Codes cross county lines, it is not possible to provide an exact picture of the STR market in Sheridan county. The Sheridan county presented in this section consists of the following ZIP Codes: 82801, 82839, 82832, 82838, 82831, 82836, 82835, 82844, 82833, 82837, 82842, and 82845.

<sup>9</sup> According to 2022 5-year ACS estimates, there are 11,840 housing units in the 82801 ZIP Code Tabulation Area.



**Figure III-37.**  
**Short Term Rental Units by ZIP Code, Sheridan County and Sheridan, 2023**

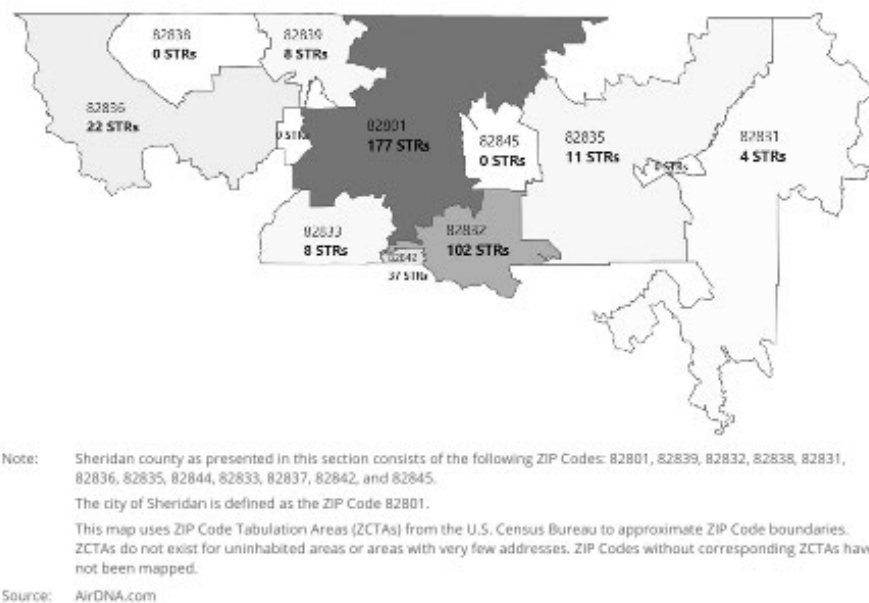
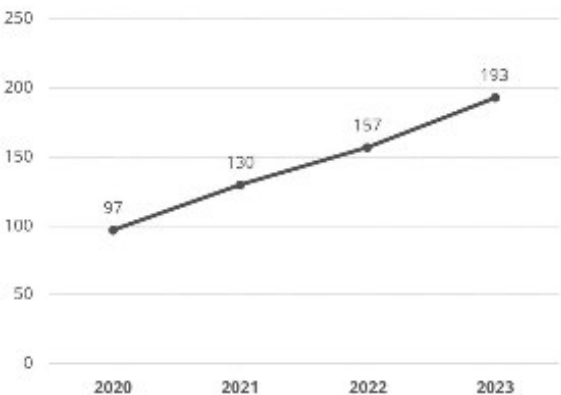


Figure III-38 below demonstrates the steady increase in the number of active STRs in Sheridan county in November for each year, 2020-2023. Note that STR activity is seasonal, with higher activity typically observed in the summer months.

**Figure III-38.**  
**Active Short Term Rental Units, Sheridan County, 2020-2023**

Note: Counts reflect units available in November of each year. The Sheridan county presented in this section consists of the following ZIP Codes: 82801, 82839, 82832, 82838, 82831, 82836, 82835, 82844, 82833, 82837, 82842, and 82845.

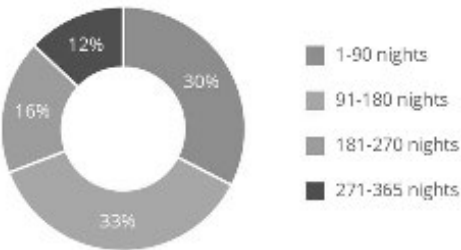
Source: AirDNA.com



As shown in Figure III-39, 63% of short term rentals in Sheridan county are available for fewer than 180 nights per year. These are considered part-time STRs, some of which may be permanently occupied and rented occasionally, and others of which may be rented consistently and otherwise vacant or used seasonally. Coupled with the fact that STR units, active and inactive, account for only 1.5% of Sheridan's total housing stock, this suggests that STR units are unlikely to affect housing supply in Sheridan county.

**Figure III-39.**  
**Short Term Rental**  
**Units by Annual**  
**Availability, Sheridan**  
**County, 2023**

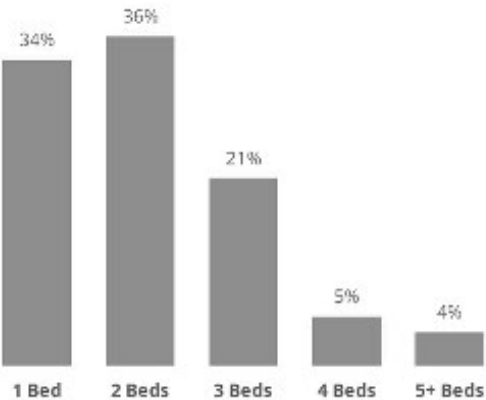
Note:  
The Sheridan county presented in this section consists of the following ZIP Codes: 82801, 82839, 82832, 82838, 82831, 82836, 82835, 82844, 82833, 82837, 82842, and 82845.  
Source:  
AirDNA.com



According to AirDNA.com, 84% of STRs in Sheridan county are entire homes and 16% are private rooms. Figure III-40 below shows the distribution of STRs by number of bedrooms. 34% of STRs in the county have 1 bedroom, 36% have 2 bedrooms, 21% have 3 bedrooms, 5% have 4 bedrooms, and 4% have 5 or more bedrooms.

**Figure III-40.**  
**Short Term Rental**  
**Units by Number of**  
**Bedrooms, Sheridan**  
**County, 2023**

Note:  
The Sheridan county presented in this section consists of the following ZIP Codes: 82801, 82839, 82832, 82838, 82831, 82836, 82835, 82844, 82833, 82837, 82842, and 82845.  
Source:  
AirDNA.com



## Housing Needs Projections

This section estimates the number of housing units needed to accommodate household growth through 2030, using population projections prepared by the Wyoming Economic Analysis Division.

Figure III-41 shows two estimates of the number of housing units each county in the Northeast Region needs to add to accommodate household growth and replace the loss in the housing stock. The first estimate assumes a housing loss of 0.24% every two years, and the second estimate assumes a housing loss of 1.7% every two years.<sup>10</sup> Estimates are shown as totals and by AMI, based on the state's AMI distribution provided by recent data from HUD's Comprehensive Housing Affordability Strategy (CHAS).

The estimates indicate that by 2030, between 1,683 and 2,986 total housing units will be needed to accommodate Campbell county households, between 1,181 and 2,154 units will be needed to accommodate Sheridan county households, between 440 and 742 units will be needed to accommodate Johnson county households, and between 340 and 580 units will be needed to accommodate Crook county households. Weston county's population decrease outpaces the loss of housing units assumed in Estimate 1, so under Estimate 1's assumptions, Weston county would not need to build additional housing units to accommodate its 2030 population. However, under Estimate 2's assumption of a higher rate of housing loss, Weston county would need to add 205 housing units to accommodate its 2030 population.

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<sup>10</sup> According to the last Components of Inventory Change Report produced by HUD in 2017, which used American Housing Survey data, it was estimated that between 2015 and 2017, about 0.24% of the national housing stock was lost through demolitions or disasters alone. According to a Brookings Institute report, the two-year housing loss over the period 1985-2013 was 1.7% in the West region of the country (<https://www.brookings.edu/articles/unpacking-the-housing-shortage-puzzle/#:~:text=Churn%20is%20the%20sum%20of,built%20homes%20and%20no%20demolitions>).

**Figure III-41.**  
**Projected Housing Units Needed Between 2021 and 2030 by Tenure and**  
**AMI, Northeast Region, Counties**

	Renters		Homeowners		Total	
	Estimate 1	Estimate 2	Estimate 1	Estimate 2	Estimate 1	Estimate 2
<b>Campbell</b>	<b>428</b>	<b>759</b>	<b>1,255</b>	<b>2,226</b>	<b>1,683</b>	<b>2,986</b>
0%-30% AMI	118	210	131	233	250	443
31%-50% AMI	94	167	82	146	176	313
51%-80% AMI	60	106	167	296	226	402
81%-100% AMI	31	55	126	224	157	279
100% + AMI	125	222	748	1,327	873	1,549
<b>Crook</b>	<b>70</b>	<b>120</b>	<b>269</b>	<b>460</b>	<b>340</b>	<b>580</b>
0%-30% AMI	12	21	26	45	38	66
31%-50% AMI	7	12	32	55	40	68
51%-80% AMI	16	28	46	78	62	106
81%-100% AMI	3	5	20	35	23	40
100% + AMI	32	54	144	246	176	301
<b>Johnson</b>	<b>128</b>	<b>215</b>	<b>312</b>	<b>526</b>	<b>440</b>	<b>742</b>
0%-30% AMI	51	86	29	50	80	136
31%-50% AMI	21	36	21	36	42	71
51%-80% AMI	20	34	46	78	66	111
81%-100% AMI	16	27	51	85	67	112
100% + AMI	19	33	165	278	184	310
<b>Sheridan</b>	<b>382</b>	<b>697</b>	<b>799</b>	<b>1,456</b>	<b>1,181</b>	<b>2,154</b>
0%-30% AMI	104	190	62	113	167	304
31%-50% AMI	60	109	63	114	122	223
51%-80% AMI	68	125	179	327	248	452
81%-100% AMI	31	57	83	151	114	207
100% + AMI	119	217	412	751	531	968
<b>Weston</b>	<b>-</b>	<b>33</b>	<b>-</b>	<b>172</b>	<b>-</b>	<b>205</b>
0%-30% AMI	-	11	-	25	-	35
31%-50% AMI	-	5	-	21	-	26
51%-80% AMI	-	6	-	33	-	39
81%-100% AMI	-	2	-	17	-	20
100% + AMI	-	9	-	76	-	84

Note: Holds latest CHAS tenure and income distribution constant.

Source: HUD CHAS 2020 estimates, American Housing Survey, and Root Policy Research.

## Recommendations from Previous Studies

The 2023 Housing Needs Assessment and Strategic Policy Recommendations report for the City of Gillette<sup>11</sup> notes that the economy has begun to rebound, and the recruitment of labor increases demand for housing in Gillette, which has experienced low growth in the housing stock driven by the economic decline that began in 2015. The report notes that Gillette “does not have a land shortage per se but rather a shortage of finished or improved lots ready for housing units to be constructed. Gillette has a sufficient supply of land to accommodate forecast housing needs but will need the land to be improved with infrastructure and housing units.”

A summary of recommended strategies to address housing needs in the report includes:

- Encouraging the production of market rate housing, which can help alleviate price and rent pressure in lower tiers of the housing market.
- Develop a long-term financing plan for expanding public infrastructure to support the creation of developments capable of serving a variety of housing needs. To encourage economic development and diversification advance public infrastructure in locations in or near existing subdivisions. Explore public finance options for large-scale developments that have one-time public infrastructure costs such as public roadway or water/ sewer improvements and consider allocating capital improvement budget funds for smaller residential projects. Private development entities should demonstrate the financial need for funding.
- Identify and sell unused public properties to fund new housing or offer them for affordable housing development if suitable for residential use.
- Identify locations to increase residential densities per acre, which can be achieved by reducing minimum lot sizes. This will help bring down the costs of creating new housing units by approximately 24% for single-family units. Focus on locations where zoning code can permit 5,000-square-foot lots compared to the current minimum size of 6,000 square feet. Also, explore other policy actions that can make on-site infrastructure more efficient and reduce costs and time needed to permit and build projects.
- Provide economic development or zoning incentives to encourage employers in key sectors like manufacturing, education, and healthcare to provide employer-assisted housing for their employees.
- Encouraging the creation of Accessory Dwelling Units (ADUs) can increase affordable housing by providing smaller living units. ADUs can accommodate extended families, provide additional income, and help older homeowners age in place. To promote ADU

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<sup>11</sup> <https://www.gillettewy.gov/home/showpublisheddocument/41969/638300419223070000>

construction, develop provisions and clear guidance for utility hook-ups. Consider refining design standards and off-street parking requirements. Hold informational workshops and prepare a guidebook for homeowners and builders.

- Local incentives can encourage the development of affordable and workforce housing. To make affordable housing projects financially feasible, incentives such as density bonuses, waiver of permit fees, dedication of public land, completion of off-site public infrastructure improvements, or local property tax abatements can be considered. New affordable rental housing developments in Wyoming are typically assisted by Low Income Housing Tax Credits (LIHTC). To increase the potential for approval, local contributions can improve the chances of being selected to receive Tax Credits.
- Consider building more manufactured housing near new or planned industrial parks. This would help align the local workforce, wages, and housing needs, as manufactured homes are quicker and cheaper to build than custom homes.
- As the population ages, there will be an increase in demand for a variety of senior housing services, including permits for home renovations, condo-style services, and multi-family developments. To cater to the needs of older adults, a range of facilities and housing options will be required, from active adult and independent living to assisted living and other supportive services.

## Appendix

The following tables show AMI limits by county, examples of establishment types by industry, and federal poverty thresholds by household size.

**Figure III-42.**  
**AMI Limits, Northeast Region, Counties, 2021**

2021 2-person AMI	Campbell	Crook	Johnson	Sheridan	Weston
30% AMI	\$21,720	\$19,440	\$20,070	\$19,470	\$19,530
50% AMI	\$36,200	\$32,400	\$33,450	\$32,450	\$32,550
80% AMI	\$28,960	\$25,920	\$26,760	\$25,960	\$26,040
100% AMI	\$72,400	\$64,800	\$66,900	\$64,900	\$65,100
120% AMI	\$86,880	\$77,760	\$80,280	\$77,880	\$78,120

Source: U.S. Department of Housing and Urban Development.

**Figure III-43.**  
**AMI Limits, Northeast Region, Counties, 2022**

2022 2-person AMI	Campbell	Crook	Johnson	Sheridan	Weston
30% AMI	\$23,760	\$21,360	\$21,030	\$21,780	\$21,030
50% AMI	\$39,600	\$35,600	\$35,050	\$36,300	\$35,050
80% AMI	\$31,680	\$28,480	\$28,040	\$29,040	\$28,040
100% AMI	\$79,200	\$71,200	\$70,100	\$72,600	\$70,100
120% AMI	\$95,040	\$85,440	\$84,120	\$87,120	\$84,120

Source: U.S. Department of Housing and Urban Development.

**Figure III-44.**  
**QCEW Establishment Examples by Industry**

Establishment Examples	
<b>Goods Producing</b>	
<b>Natural Resources &amp; Mining</b>	Farms, ranches, dairies, greenhouses, nurseries, orchards, hatcheries, mine operation and mining support activities.
<b>Construction</b>	General contractors, design-builders, construction managers, turnkey contractors.
<b>Manufacturing</b>	Plants, factories, mills.
<b>Service Providing</b>	
<b>Trade, Transportation, &amp; Utilities</b>	Wholesale merchants, distributors, shippers, import/export merchants, office supply retailers, computer and software retailers, building materials dealers, plumbing supply retailers, electrical supply retailers, electric power, natural gas, steam supply, water supply, and sewage removal.
<b>Information</b>	Software publishing, broadcasting and content providers, telecommunications, computing infrastructure providers, data processing, Web hosting.
<b>Financial Activities</b>	Commercial banks, credit unions, rental and leasing services.
<b>Professional &amp; Business Services</b>	Legal advice and representation, accounting, bookkeeping, payroll services, architectural, engineering, consulting services.
<b>Education &amp; Health Services</b>	Schools, colleges, universities, hospitals, nursing care facilities.
<b>Leisure &amp; Hospitality</b>	Hotels, restaurants, gambling establishments.
<b>Other Services</b>	Equipment and machinery repairing, grantmaking, advocacy, and providing drycleaning and laundry services, personal care services.
<b>Public Administration</b>	Federal, state, and local government agencies.

Source: BLS Quarterly Census of Employment and Wages.

**Figure III-45.**  
**Federal Poverty Thresholds by Household Size, 2010**

Size of Family Unit	Weighted Average Thresholds	Related Children Under 18 Years								
		None	One	Two	Three	Four	Five	Six	Seven	Eight or More
One person (unrelated individual)	\$11,139									
Under 65 years	\$11,344	\$11,344								
65 years and over	\$10,458	\$10,458								
Two people	\$14,218									
Householder under 65 years	\$14,676	\$14,602	\$15,030							
Householder 65 years and over	\$13,194	\$13,180	\$14,973							
Three people	\$17,374	\$17,057	\$17,552	\$17,568						
Four people	\$22,314	\$22,491	\$22,859	\$22,113	\$22,190					
Five people	\$26,439	\$27,123	\$27,518	\$26,675	\$26,023	\$25,625				
Six people	\$29,897	\$31,197	\$31,320	\$30,675	\$30,056	\$29,137	\$28,591			
Seven people	\$34,009	\$35,896	\$36,120	\$35,347	\$34,809	\$33,805	\$32,635	\$31,351		
Eight people	\$37,934	\$40,146	\$40,501	\$39,772	\$39,133	\$38,227	\$37,076	\$35,879	\$35,575	
Nine people or more	\$45,220	\$48,293	\$48,527	\$47,882	\$47,340	\$46,451	\$45,227	\$44,120	\$43,845	\$42,156

Source: U.S. Census Bureau.



**Figure III-46.**  
Federal Poverty Thresholds by Household Size, 2021

Size of Family Unit	Weighted Average Thresholds	Related Children Under 18 Years								
		None	One	Two	Three	Four	Five	Six	Seven	Eight or More
One person (unrelated individual)	\$13,788									
Under 65 years	\$14,097	\$14,097								
65 years and over	\$12,996	\$12,996								
Two people	\$17,529									
Householder under 65 years	\$18,231	\$18,145	\$18,677							
Householder 65 years and over	\$16,400	\$16,379	\$18,606							
Three people	\$21,559	\$21,196	\$21,811	\$21,831						
Four people	\$27,740	\$27,949	\$28,406	\$27,479	\$27,575					
Five people	\$32,865	\$33,705	\$34,195	\$33,148	\$32,338	\$31,843				
Six people	\$37,161	\$38,767	\$38,921	\$38,119	\$37,350	\$36,207	\$35,529			
Seven people	\$42,156	\$44,606	\$44,885	\$43,925	\$43,255	\$42,009	\$40,554	\$38,958		
Eight people	\$47,093	\$49,888	\$50,329	\$49,423	\$48,629	\$47,503	\$46,073	\$44,585	\$44,207	
Nine people or more	\$56,325	\$60,012	\$60,303	\$59,501	\$58,828	\$57,722	\$56,201	\$54,826	\$54,485	\$52,386

Source: U.S. Census Bureau.

## SECTION IV.

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### NORTHWEST REGION

## SECTION IV. Northwest Region

This regional summary provides demographic, economic, and housing market data for the Northwest Region. Wyoming's Northwest Region is comprised of Big Horn county, Fremont county, Hot Springs county, Park county, and Washakie county.

### Northwest Region



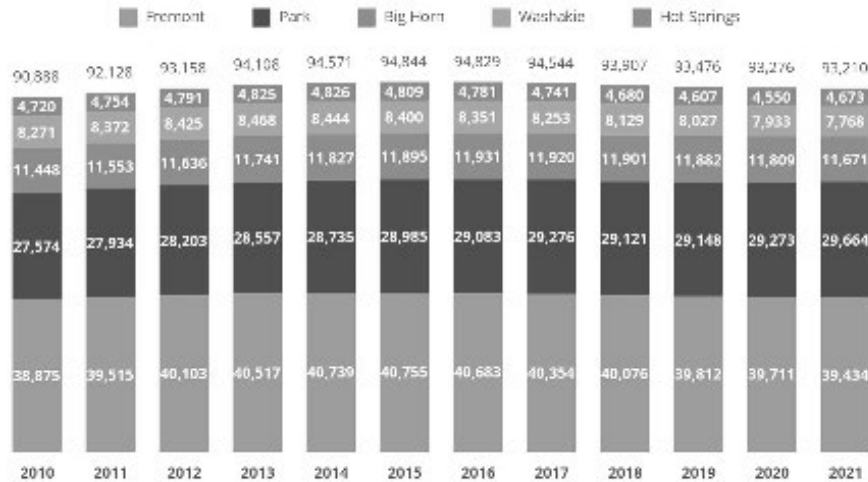
### Demographic Trends

**Population growth.** The population of Wyoming's Northwest Region grew by around 2.6% from 2010 to 2021, while the State of Wyoming's population grew by around 5.7% over the same period. As shown in Figure IV-1, the Northwest Region's population increased each year from 90,888 residents in 2010 to nearly 95,000 residents in 2015 and decreased modestly each year from 2015 to 93,210 residents in 2021. This trend mirrors trends in the State of Wyoming's population, which grew each year from 2010 to 2017 and has modestly decreased since.

The populations of Fremont, Park, and Big Horn Counties, the three largest counties in the Region by population, increased overall from 2010 to 2021. Meanwhile, the populations of Washakie and Park Counties decreased overall.

All counties except for Park county, which experienced the largest total population growth at 7.6%, experienced positive annual population growth until entering periods of zero or negative annual population growth beginning in the mid-2010s.

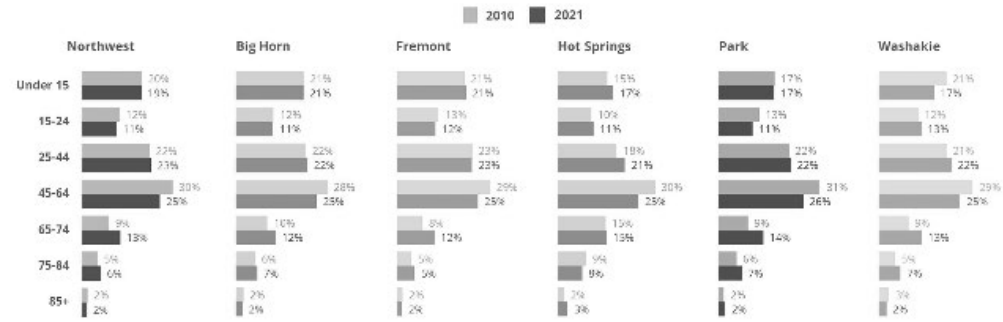
**Figure IV-1.**  
**Population, Northwest Region, 2010-2021**



Source: 2010-2021 5-year ACS and Root Policy Research.

**Age distribution.** As shown in Figure IV-2, between 2010 and 2021, the Northwest Region's share of residents aged 65 and older increased by around five percentage points from 16% to 21%. The share of residents aged 65 and older increased in each county in the Northwest Region except for Hot Springs county, where it remained stable. At the same time, the Region's share of residents aged 25-64 decreased by around four percentage points from 52% to 48%. Each county within the Region experienced decreases in the share of residents aged 25-64. The Northwest Region's growing senior population underscores the importance of aging-friendly housing options moving forward, while its shrinking share of working-aged individuals raises concerns about a shrinking workforce.

**Figure IV-2.**  
**Age Distribution, Northwest Region, 2010 and 2021**

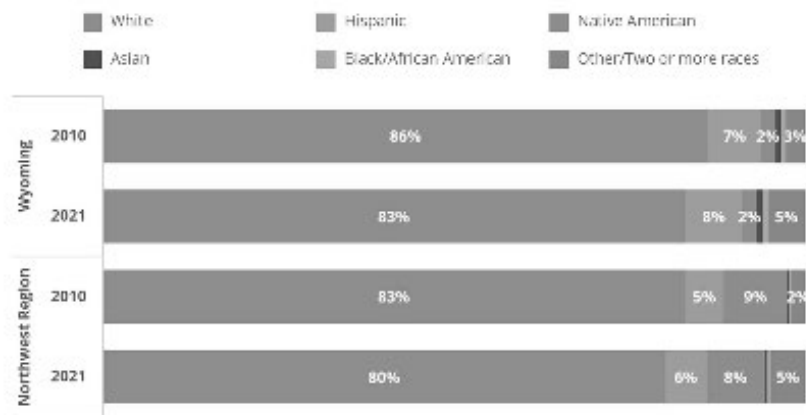


Source: 2010 and 2021 5-year ACS and Root Policy Research.

**Racial and ethnic distribution.** As shown in Figure IV-3, the Northwest Region's racial and ethnic makeup differs from Wyoming's racial and ethnic distribution. Home to the Wind River Reservation, 8% of the Northwest Region's population identifies as Native American compared to 2% of Wyoming's population. The share of the population identifying as Hispanic is two percentage points lower in the Northwest Region than it is in Wyoming and the share of the population identifying as White is three percentage points lower in the Northwest Region than it is in Wyoming.

The Northwest Region's population has become more racially and ethnically diverse since 2010. The share of non-Hispanic White residents has decreased by three percentage points, while the shares of the population identifying as Hispanic and Other/Two or more races have increased by one and three percentage points, respectively.

**Figure IV-3.**  
**Race and Ethnicity, Wyoming and Northwest Region, 2010 and 2021**

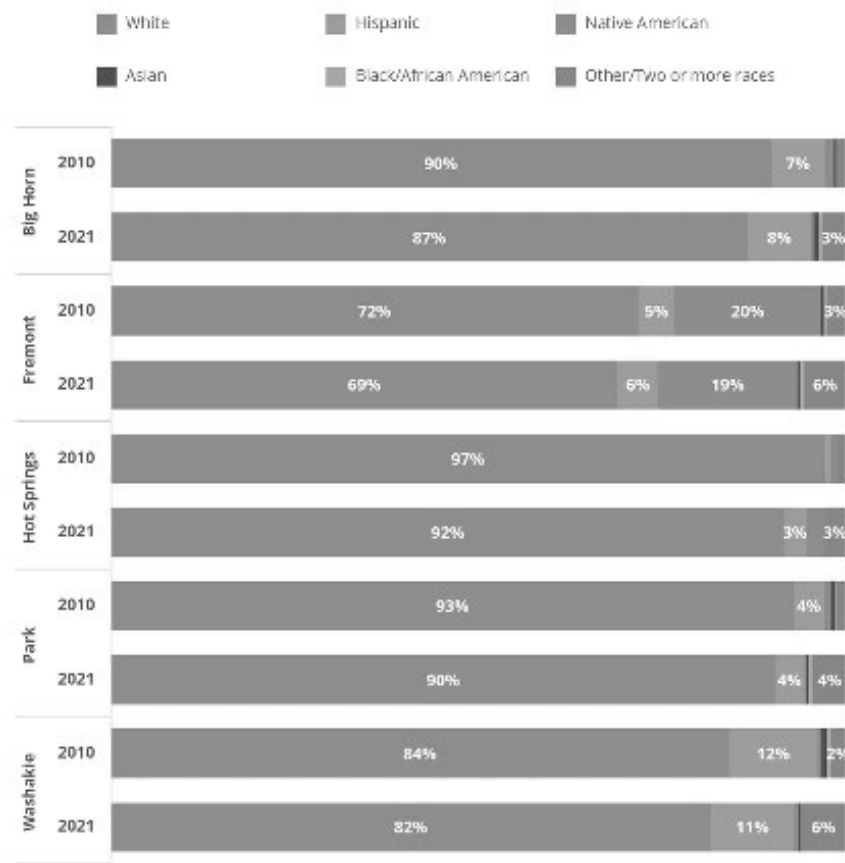


Note: The categories White, Native American, Asian, Black/African American, and Other/Two or more races include only non-Hispanic. The Hispanic category refers to Hispanics of any race. 0% and 1% labels are not shown.  
Source: 2010 and 2021 5-year ACS and Root Policy Research.

Figure IV-4 shows racial and ethnic distributions for each county within the Northwest Region in 2010 and 2021. Fremont county is the most racially and ethnically diverse county within the Northwest Region (and one of the most diverse counties in Wyoming), followed by Washakie county.

Fremont county, home to the Wind River Reservation, has the largest share of Native American residents (nearly 20%) of all counties in Wyoming. Eleven percent of Washakie county's population identifies as Hispanic—a share at least three percentage points higher than that of other counties in the Region.

**Figure IV-4.**  
**Race and Ethnicity, Northwest Region, Counties 2010 and 2021**



Note: The categories White, Native American, Asian, Black/African American, and Other/Two or more races include only non-Hispanic. The Hispanic category refers to Hispanics of any race. 0% and 1% labels are not shown.  
 Source: 2010 and 2021 5-year ACS and Root Policy Research.

**Migration.** Figure IV-5 shows net migration data based on year-to-year address changes reported on individual income tax returns filed with the IRS for each county in Wyoming’s Northwest Region from 2012 to 2021. Net migration<sup>1</sup> in the Northwest Region was positive

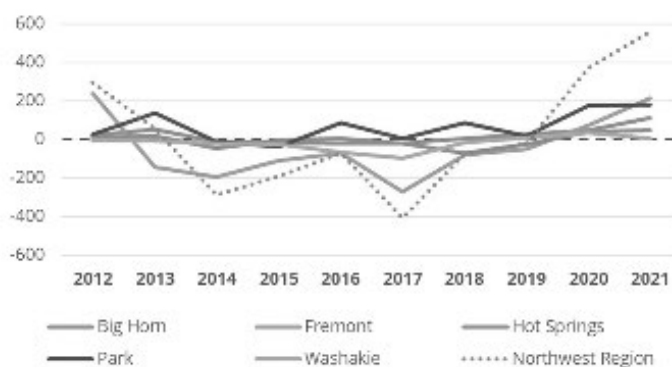
<sup>1</sup> Net migration is the difference between inflows and outflows, where inflows represent the number of new households who filed a return in the county and filed a return in a different county the previous year and outflows are

in 2012 and 2013 before becoming negative in 2014. Negative net migration continued in the Northwest Region until 2020 and remained positive in 2021. The Region's negative net migration was most substantial alongside the energy sector's contraction.

Total net migration from 2012 to 2021 was positive for Big Horn and Park Counties and negative for Fremont, Hot Springs, and Washakie Counties. Each county in the region experienced positive net migration in 2020 and 2021.

**Figure IV-5.  
Net Migration,  
Northwest  
Region, Counties,  
2012-2021**

Source:  
Internal Revenue Service and  
Root Policy Research.



The data also provide the total adjusted gross income, which allows the estimation of the average adjusted gross income<sup>2</sup> for inflow and outflow returns each year. Figure IV-6 shows the difference between the average income of in-migrants and the average income of out-migrants for each county in the Northwest Region from 2012 to 2021 to identify migration-driven trends in income. It should be noted that these are averages and can be skewed by a small number of very high income households in some of the years. Key trends are outlined here:

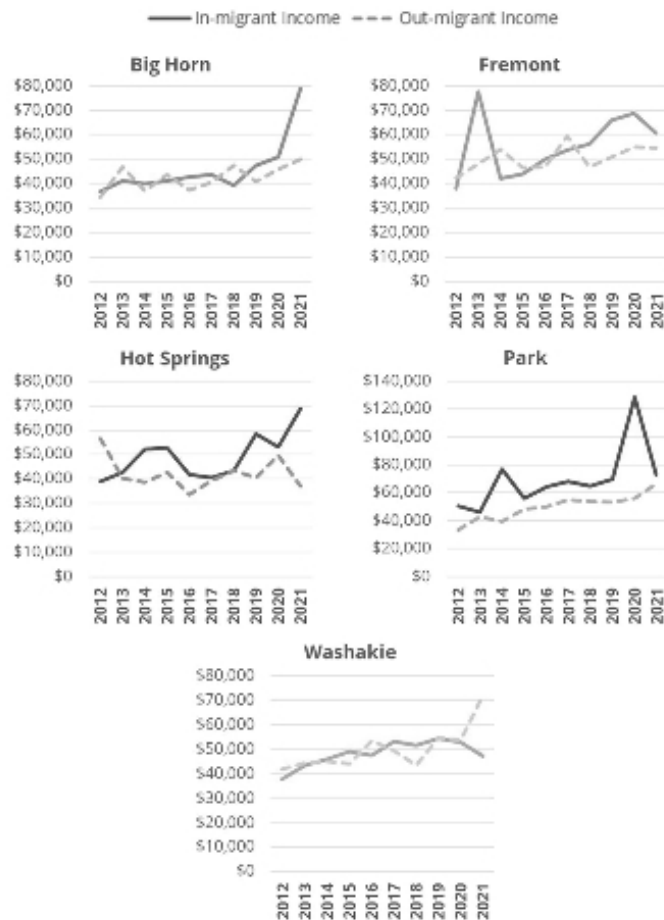
- Since 2019, in-migrants to Big Horn, Fremont, Hot Springs, and Park counties have had higher average incomes than out-migrants from these counties. Net migration in these counties has been positive or near-zero in each year since 2019.
- In Washakie county in-migrants and out-migrants had similar average incomes for most of the time period between 2012 and 2020. In 2021, the average income for out-migrants was higher than for in-migrants.

the number of households who filed a return in a county other than the specified county and had filed a return in the specified county the previous year.

<sup>2</sup> Adjusted Gross Income (AGI) is defined as gross income minus adjustments to income. Gross income includes your wages, dividends, capital gains, business income, retirement distributions as well as other income. Adjustments to Income include such items as Educator expenses, Student loan interest, Alimony payments or contributions to a retirement account.



**Figure IV-6.**  
**Average Income of In-migrants and Out-migrants, Northwest Region, Counties 2012-2021**



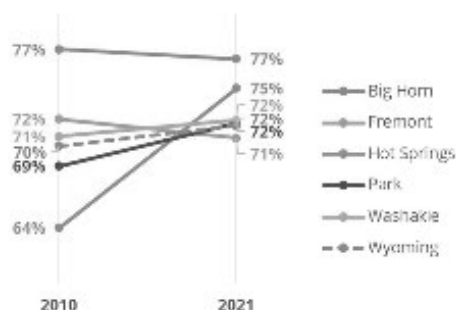
Source: Internal Revenue Service and Root Policy Research.

**Homeownership.** Homeownership rates for each county in the Northwest Region are shown in Figure IV-7. Between 2010 and 2021, homeownership decreased by one percentage point in Fremont county and by less than one percentage point in Big Horn county. Homeownership rates increased in Park county by three percentage points and in Washakie county by one percentage point.

Hot Springs county saw an 11% increase in homeownership, but there were significant margins of error in the estimated rates for 2010 and 2021. The decrease in population could explain the increase in homeownership, as in-migrants had higher incomes than out-migrants, for most years studied, suggesting that renters may be leaving Hot Springs county.

**Figure IV-7.**  
**Homeownership Rates,**  
**Northwest Region, Counties**  
**2010 and 2021**

Source:  
2010 and 2021 5-year ACS and Root Policy  
Research.



**Income and poverty.** Figure IV-8 shows median income for homeowners and renters in each county in Wyoming's Northwest Region. Key trends in median income by tenure include:

- In 2021, median income for renters in the Northwest Region is around 60% of owner income. Between 2010 and 2021, renter income grew as a percentage of owner income in Big Horn, Fremont, and Hot Springs counties. Renter income remained stable as a percentage of owner income in Park county and decreased as a percentage of owner income in Washakie county.
- From 2010 to 2021, median incomes for both owners and renters increased in every county in the Northwest Region.
- Median incomes for homeowners in Park and Washakie counties increased at greater rates overall than median income for homeowners in Wyoming, while median incomes for owners in Big Horn and Fremont counties increased at lower rates than median income for owners in Wyoming.
- Renters in Big Horn, Fremont, Hot Springs, and Park counties saw their incomes increase at greater rates than renters in Wyoming, while renters in Washakie county saw their incomes increase at a lower rate overall than renters in Wyoming.
- In 2021, the median homeowner income for each county in the Northwest Region is lower than that of Wyoming, while renters in each constituent county except for Big Horn county have median incomes higher than that of Wyoming.

**Figure IV-8.  
Median Income by  
Tenure, Northwest  
Region, Counties, 2010  
and 2021**

Source:  
2010 and 2021 5-year ACS and Root Policy  
Research.

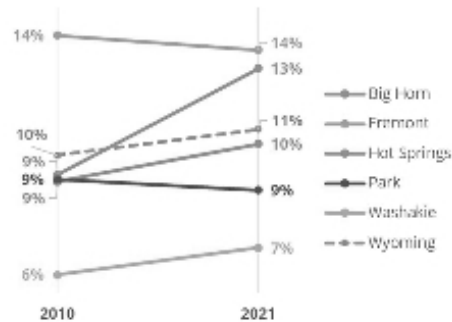
	Median Income		2010-2021 Change	
	2010	2021	Amount	Percent
<b>Big Horn</b>				
Owner	\$53,862	\$62,566	\$8,704	16%
Renter	\$28,592	\$38,143	\$9,551	33%
<b>Fremont</b>				
Owner	\$55,449	\$67,787	\$12,338	22%
Renter	\$31,061	\$41,326	\$10,265	33%
<b>Hot Springs</b>				
Owner	\$57,500	\$72,995	\$15,495	27%
Renter	\$24,150	\$45,385	\$21,235	88%
<b>Park</b>				
Owner	\$53,638	\$69,500	\$15,862	30%
Renter	\$32,376	\$41,917	\$9,541	29%
<b>Washakie</b>				
Owner	\$54,512	\$73,327	\$18,815	35%
Renter	\$37,868	\$39,622	\$1,754	5%
<b>Wyoming</b>				
Owner	\$64,489	\$81,875	\$17,386	27%
Renter	\$33,550	\$39,506	\$5,956	18%

Poverty rates for each county in Wyoming's Northwest Region are presented in Figure IV-9. Between 2010 and 2021, poverty rates increased by nearly four percentage points in Hot Springs county, by one percentage point in Big Horn county, and by one percentage point in Washakie county. Despite its slight increase, Washakie county's poverty rate is the lowest of any county in Wyoming. Poverty decreased by less than one percentage point in each of Fremont and Park counties, the Region's two largest counties by population.

In 2021, Big Horn, Park, and Washakie counties had poverty rates lower than that of Wyoming (11 percent). Fremont and Hot Springs counties had poverty rates within three percentage points above the state poverty rate in 2021.

**Figure IV-9.**  
**Poverty Rate, Northwest**  
**Region, Counties, 2010 and**  
**2021**

Source:  
 2010 and 2021 5-year ACS and Root Policy Research.

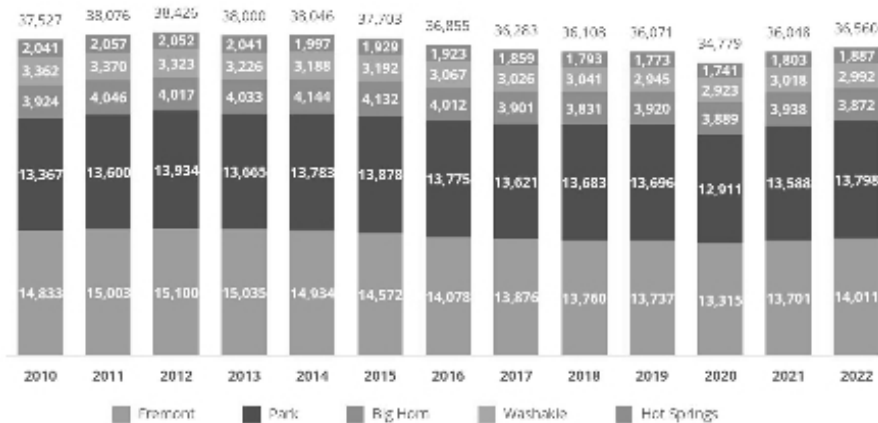


## Economic Trends

**Employment.** Total employment in the Northwest Region increased from 2010 to 2012 before decreasing each year from 2015 to 2020. In the period shown in Figure IV-10 below, the largest single-year drop in employment was brought on by the COVID-19 pandemic between 2019 and 2020. Total employment in the Region recovered to pre-pandemic levels by 2022.

Total employment increased overall in only Park county. All other counties saw total employment decrease over time. Home to most of Yellowstone National Park's land, Park county's relatively strong employment is likely due to its status as a tourist destination.

**Figure IV-10.**  
**Total Employment by County, Northwest Region, Counties, 2010 to 2022**



Source: Quarterly Census of Employment and Wages and Root Policy Research.

The three largest industries in the Northwest Region by employment are Education & Health Services (28% of total jobs); Trade, Transportation, & Utilities (18% of total jobs); and Leisure & Hospitality (15% of total jobs).

Figures IV-11 to IV-15 provide a detailed overview of employment within each constituent county of Wyoming's Northwest Region. Figures are presented in the order of highest to lowest total employment.

As shown in Figure IV-11, total employment in Fremont county fell by 6% (-822 jobs) between 2010 and 2022. The county's substantial negative net migration is likely the result of this job loss. In 2022 as in 2010, Fremont county's two largest sectors by employment are Education & Health Services (4,793 jobs) and Trade, Transportation, & Utilities (2,666 jobs). Between 2010 and 2022, Leisure & Hospitality surpassed Public Administration to become Fremont county's third largest sector by employment with 1,659 jobs. Employment within the Education & Health Services industry experienced the largest total growth (+290 jobs), followed by Manufacturing (+127 jobs). Natural Resources & Mining (-318 jobs) and Public Administration (-274 jobs) experienced the largest losses.

**Figure IV-11.**  
**Employment by Industry, Fremont County, 2010 and 2022**

Fremont County	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
Goods Producing	2,095	1,765	-330	-16%
Natural Resources & Mining	859	541	-318	-37%
Construction	976	837	-139	-14%
Manufacturing	260	387	127	49%
Service Providing	12,738	12,246	-492	-4%
Trade, Transportation, & Utilities	2,840	2,666	-174	-6%
Information	233	121	-112	-48%
Financial Activities	692	487	-205	-30%
Professional & Business Services	685	697	12	2%
Education & Health Services	4,503	4,793	290	6%
Leisure & Hospitality	1,540	1,659	119	8%
Other Services	501	353	-148	-30%
Public Administration	1,744	1,470	-274	-16%
All Industries	14,833	14,011	-822	-6%

Source: Quarterly Census of Employment and Wages and Root Policy Research.

Figure IV-12 below shows employment in Park county. As noted earlier, Park county is the only county in the Northwest Region that experienced growth in total employment between 2010 and 2022. Employment grew by 431 jobs, or 3%.

In both 2010 and 2022, Park county's three largest sectors by employment are Education & Health Services (3,353 jobs), Leisure & Hospitality (3,041 jobs), and Trade, Transportation, & Utilities (2,483 jobs). Employment within the Professional & Business Services industry experienced the largest total growth (+197 jobs), followed by Leisure & Hospitality (+181 jobs). The greatest job loss took place in the Natural Resources & Mining industry (-179 jobs).

**Figure IV-12.**  
**Employment by Industry, Park County, 2010 and 2022**

Park County	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
<b>Goods Producing</b>	<b>2,275</b>	<b>2,111</b>	<b>-164</b>	<b>-7%</b>
Natural Resources & Mining	877	698	-179	-20%
Construction	919	955	36	4%
Manufacturing	479	457	-22	-5%
<b>Service Providing</b>	<b>11,092</b>	<b>11,687</b>	<b>595</b>	<b>5%</b>
Trade, Transportation, & Utilities	2,505	2,483	-22	-1%
Information	232	229	-3	-1%
Financial Activities	471	548	77	16%
Professional & Business Services	705	902	197	28%
Education & Health Services	3,187	3,353	166	5%
Leisure & Hospitality	2,860	3,041	181	6%
Other Services	264	277	13	5%
Public Administration	868	854	-14	-2%
<b>All Industries</b>	<b>13,367</b>	<b>13,798</b>	<b>431</b>	<b>3%</b>

Source: Quarterly Census of Employment and Wages and Root Policy Research.

Figure IV-13 below shows employment details for Big Horn county. Across the time studied, total employment in the county decreased by 1%, or 52 jobs. In both 2010 and 2022, Big Horn county's three largest sectors by employment are Education & Health Services (1,078 jobs), Natural Resources & Mining (570 jobs), and Trade, Transportation, & Utilities (485 jobs). Between 2010 and 2022, the Manufacturing industry added the most jobs (+92) in the county. The Natural Resources & Mining industry lost the most jobs between 2010 and 2022 (-126 jobs).

**Figure IV-13.**  
**Employment by Industry, Big Horn County, 2010 and 2022**

Big Horn County	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
Goods Producing	1,217	1,188	-29	-2%
Natural Resources & Mining	696	570	-126	-18%
Construction	290	296	6	2%
Manufacturing	231	323	92	40%
Service Providing	2,707	2,684	-23	-1%
Trade, Transportation, & Utilities	550	485	-65	-12%
Information	112	62	-50	-45%
Financial Activities	103	135	32	31%
Professional & Business Services	267	290	23	9%
Education & Health Services	1,047	1,078	31	3%
Leisure & Hospitality	252	301	49	19%
Other Services	65	34	-31	-48%
Public Administration	311	299	-12	-4%
All Industries	3,924	3,872	-52	-1%

Source: Quarterly Census of Employment and Wages and Root Policy Research.

As shown in Figure IV-14, total employment in Washakie county fell by 11% (370 jobs) between 2010 and 2022. In 2022 and in 2010, Washakie county's three largest industries by employment are Trade, Transportation, & Utilities (652 jobs), Education & Health Services (542 jobs), and Manufacturing (466 jobs). The largest total job growth took place in the Education & Health Services industry, though this growth was small at 13 jobs. Seven of the eleven industries experienced job loss over the time studied, with the most significant losses taking place in the Professional & Business Services industry (-115 jobs or -50%) and the Financial Activities industry (-73 jobs or -37%).

**Figure IV-14.**  
**Employment by Industry, Washakie County, 2010 and 2022**

Washakie County	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
Goods Producing	985	880	-105	-11%
Natural Resources & Mining	256	209	-47	-18%
Construction	272	204	-68	-25%
Manufacturing	457	466	9	2%
Service Providing	2,377	2,112	-265	-11%
Trade, Transportation, & Utilities	652	652	0	0%
Information	80	46	-34	-43%
Financial Activities	196	123	-73	-37%
Professional & Business Services	229	114	-115	-50%
Education & Health Services	529	542	13	2%
Leisure & Hospitality	316	290	-26	-8%
Other Services	99	109	10	10%
Public Administration	276	236	-40	-14%
All Industries	3,362	2,992	-370	-11%

Source: Quarterly Census of Employment and Wages and Root Policy Research.

As shown in Figure IV-15 below, total employment in Hot Springs county decreased by 154 jobs, or 8%. In both 2010 and 2022, the three largest sectors of the economy are Education & Health Services (566 jobs), Leisure & Hospitality (339 jobs), and Trade, Transportation, & Utilities (241 jobs). The largest total job growth took place in the Professional & Business Services Industry (+44 jobs) and the greatest job losses took place in two of the county's largest industries: Education & Health Services (-116 jobs) and Trade, Transportation, & Utilities (-70 jobs).



**Figure IV-15.**  
**Employment by Industry, Hot Springs County, 2010 and 2022**

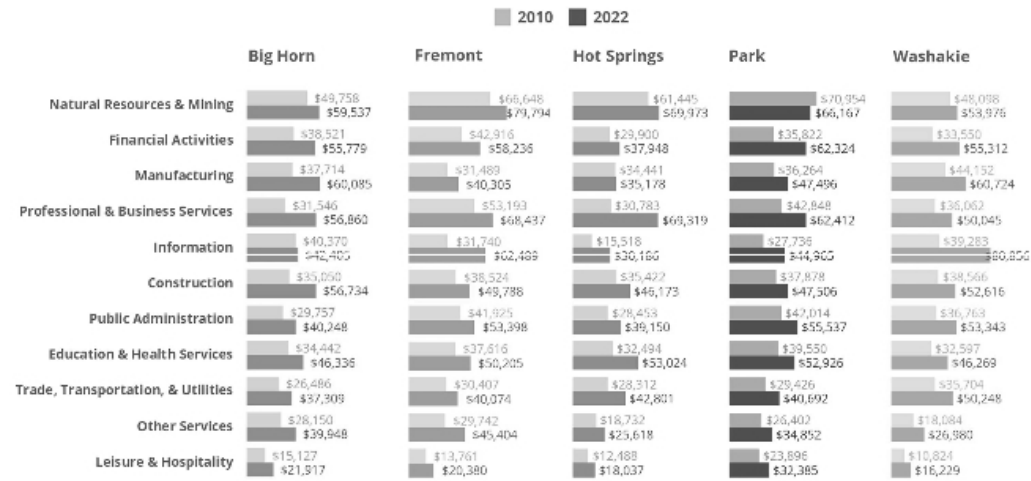
Hot Springs County	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
Goods Producing	382	400	18	5%
Natural Resources & Mining	240	208	-32	-13%
Construction	81	90	9	11%
Manufacturing	62	102	40	65%
Service Providing	1,659	1,487	-172	-10%
Trade, Transportation, & Utilities	311	241	-70	-23%
Information	40	15	-25	-63%
Financial Activities	55	68	13	24%
Professional & Business Services	63	107	44	70%
Education & Health Services	682	566	-116	-17%
Leisure & Hospitality	333	339	6	2%
Other Services	56	57	1	2%
Public Administration	119	94	-25	-21%
All Industries	2,041	1,887	-154	-8%

Source: Quarterly Census of Employment and Wages and Root Policy Research.

**Wages.** Figure IV-16 shows average annual wages by industry for each county in Wyoming's Northwest Region. Between 2010 and 2022, average annual wages grew for each industry in each county of the Region except for Park county's Natural Resources & Mining industry.

The Natural Resources & Mining industry has the highest average annual wages of any industry in Fremont, Hot Springs, and Park counties. The Manufacturing industry has the highest average annual wages of any industry in Big Horn county, followed closely by the Natural Resources & Mining industry. In Washakie county, the highest average annual wages are found in the Information industry, a relatively small industry with only 43 jobs in 2022. Washakie county's second highest average annual wages are found in the Manufacturing industry.

**Figure IV-16.**  
**Average Annual Wages by Industry, Northwest Region, Counties, 2010 and 2022**



Source: Quarterly Census of Employment and Wages and Root Policy Research.

## Housing Market Trends

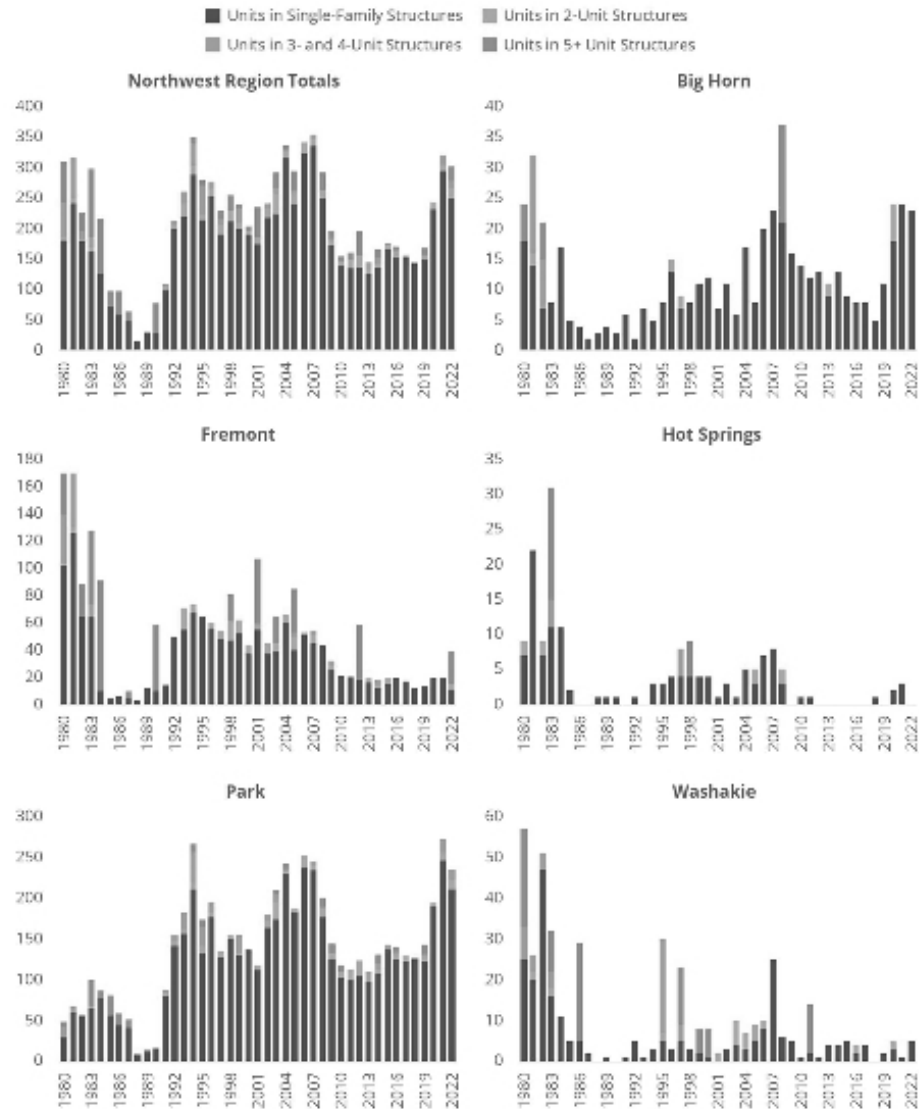
**Residential building permits.** Residential building permits in Wyoming's Northwest Region have been dominated by units in single-family structures. Around 83% of units permitted in the Northwest Region since 1980 were units in single-family structures and around 8% were units in multifamily structures of 5 units or more. Units in 2-unit structures accounted for 4% of units permitted, as did units in 3- and 4-unit structures.

Figure IV-17 below shows trends in residential building permits for the Northwest Region and each of its constituent counties. Please note that scale differs in each geography's section of the figure based on total permits issued. Park and Fremont counties make up the largest volumes of permits issued.

The Northwest Region and each of its counties saw relatively high volumes of building permits issued in the early 1980s before experiencing a significant drop in permits issued with the 1980s recession. The Northwest Region and each of its counties saw a fall in permitting with the 2008 recession. Issuance of building permits remained low in the region before increasing significantly in 2020 and reaching pre-recession levels in 2021.

Park County has issued a greater number of permits as compared to Fremont County, despite the latter having a historically larger population. This difference can be attributed to Park County's status as a tourist destination.

**Figure IV-17.**  
**Building Permits by Units in Structure, Northwest Region, Counties, 1980-**  
**2022**

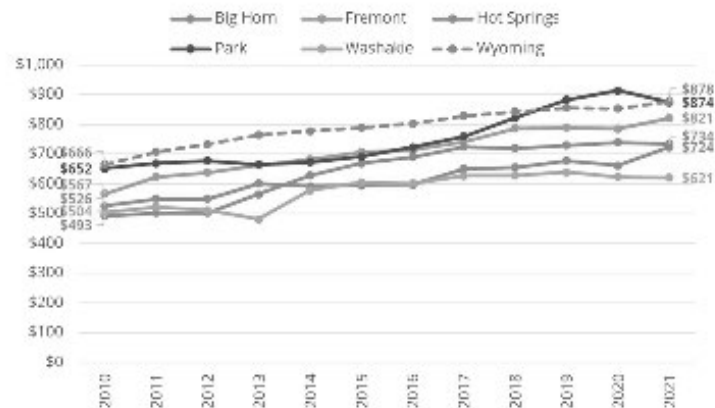


Source: U.S. Census Building Permits Survey and Root Policy Research.

**Median rent.** Figure IV-18 shows trends in median gross rent for the state of Wyoming and the Northwest Region counties. Wyoming and each Northwest Region county experienced a growth in median gross rents between 2010 and 2021. In each year studied, median gross rent in Big Horn, Fremont, Hot Springs, and Washakie counties was lower than it was in Wyoming. Park county's median gross rent exceeded that of Wyoming in 2019 and 2020. As of 2021, Park county has the highest median gross rent in the Northwest Region (\$874), while Washakie county has the lowest (\$621). Washakie county's median gross rent is also the lowest of any county in Wyoming.

**Figure IV-18.**  
**Median**  
**Gross Rent,**  
**Wyoming**  
**and**  
**Northwest**  
**Region,**  
**Counties,**  
**2010-2021**

Source:  
2010-2021 5-year ACS  
and Root Policy  
Research.



The median rent data shown above reflects rents for all rental units until 2021 according to ACS estimates. Additional detail for 2023 year-to-date median rents in units in structures containing five or more housing units is available in the table below. As data are not available for all multifamily units in each county, the final column in the table specifies the number of units reflected in the median rent estimate.

**Figure IV-19.**  
**Multifamily Median Rent, Northwest**  
**Region, Counties, 2023 YTD**

Note:  
Multifamily units are defined as units in buildings of 5+ units.

Source:  
CoStar and Root Policy Research.

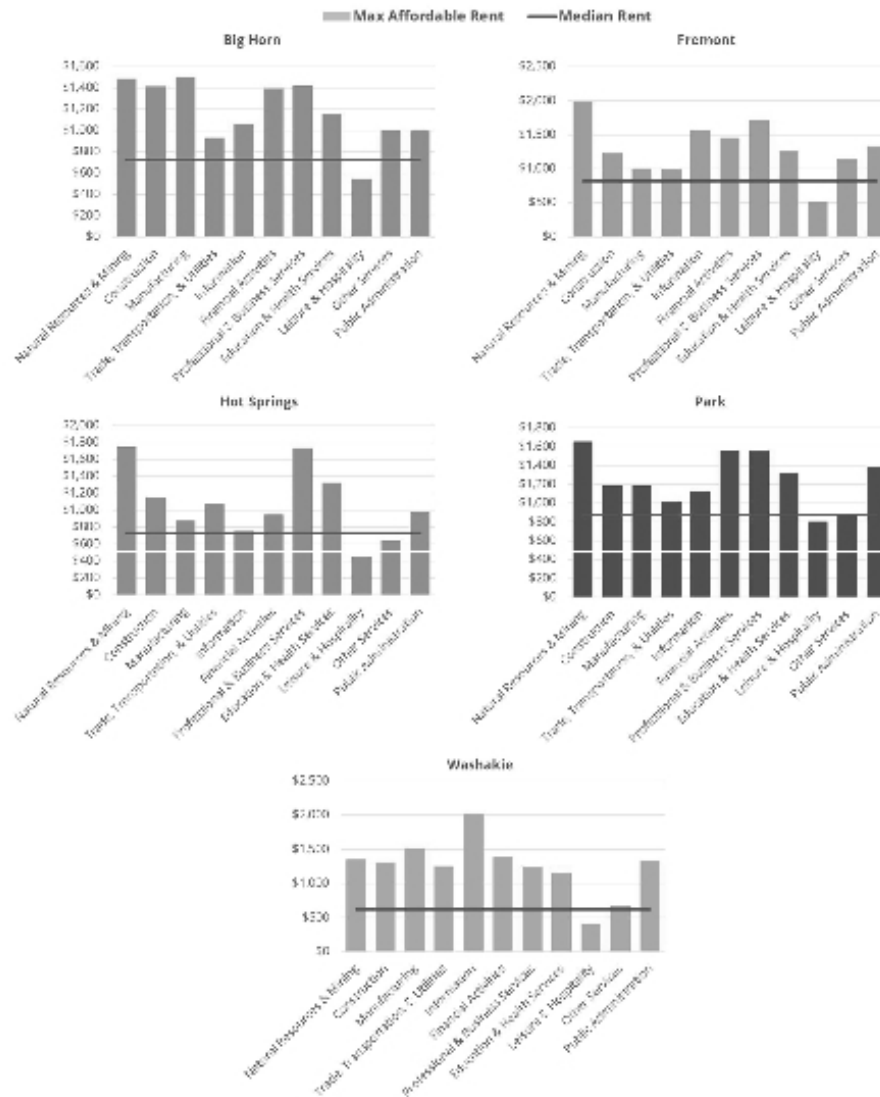
	Median Rent	Units Included
Big Horn	\$729	20
Fremont	\$820	270
Hot Springs	\$604	4
Park	\$724	55
Washakie	\$1,105	36

**Housing affordability by industry.** The federal government considers housing to be affordable when housing cost—the rent or mortgage payment plus taxes, utilities, mortgage, insurance, and HOA fees—consumes 30% or less of a household's gross income.

Households spending more than 30% of their gross income are considered to be cost burdened.

Figures IV-20 and IV-21 below illustrate housing affordability for the Northwest Region's workforce by comparing median rent and median home sales prices with rental and ownership affordability thresholds for individuals earning the average annual wages of industries in each county. As shown in Figure IV-20, median rent is affordable to individuals earning average wages for all industries in all Northwest Region counties except for Leisure & Hospitality in all counties and Other Services in Hot Springs county. Notably, Leisure & Hospitality accounts for 15% of jobs in the Northwest Region, making it the third largest sector by employment in the region.

**Figure IV-20.**  
**Rental Affordability by Industry, Northwest Region, Counties, 2021/22**



Note: Affordability estimates assume families spend no more than 30% of their income on housing. Max affordable rent estimates are based on 2022 average wage data, while median rent estimates are based on 2021 data.

Source: Quarterly Census of Employment and Wages, 2021 5-year ACS, and Root Policy Research.

Figure IV-21 below shows home purchase affordability by industry. Homeownership is significantly less affordable for each industry's workforce than renting. Individuals earning the average wage for any industry in Big Horn, Fremont, and Park counties cannot afford to buy a home at their counties' median home sales price.

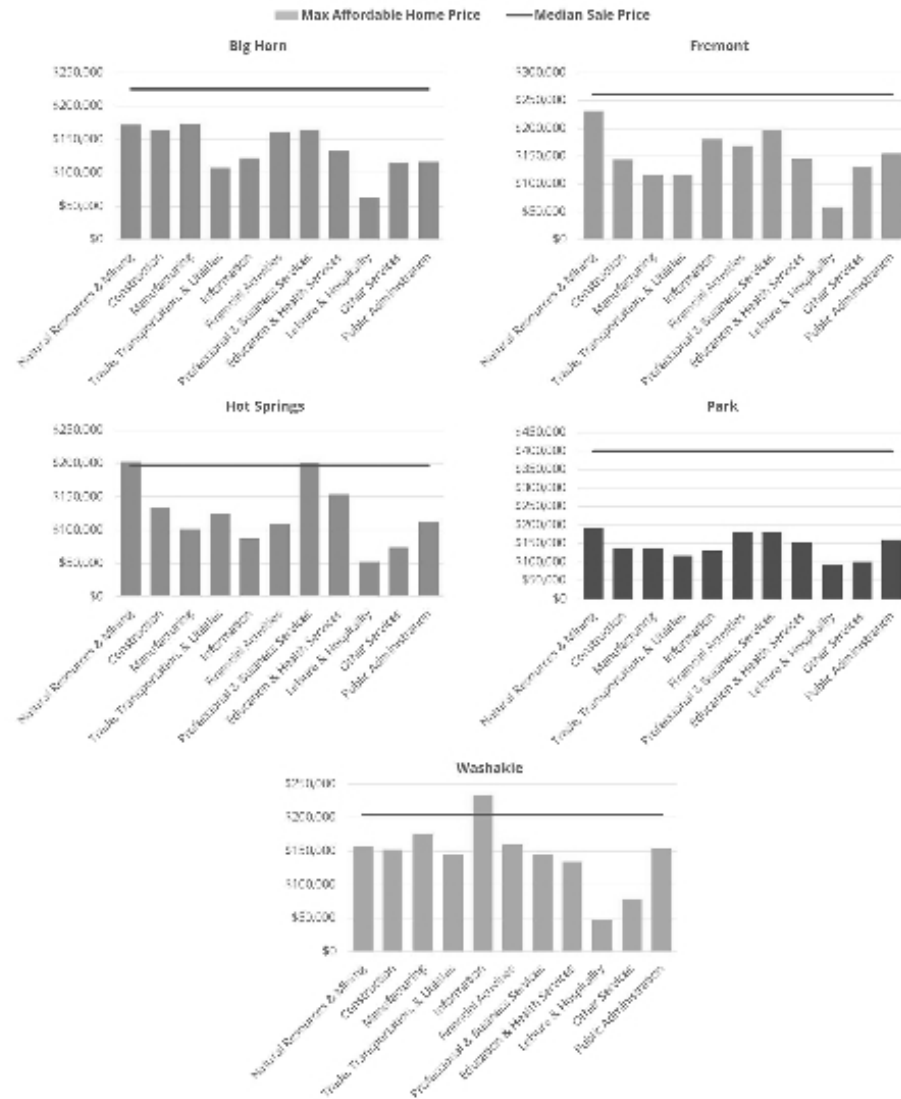
In Hot Springs county, individuals earning the average wage in the Natural Resources & Mining and Professional & Business Services industries can afford to buy a median-priced home, while average wage earners in all other industries cannot afford to buy a median-priced home. Hot Springs county's Natural Resources & Mining and Professional & Business Services industries account for only 10% of its total workforce.

Average wage earners in Washakie county's Information industry, which accounts for under 2% of the county's workforce, can afford to purchase a median-priced home. Average wage earners in all other industries in Washakie county cannot afford to buy a median-priced home.

Altogether, if all employees earn the average wage for their industry in their county, only 0.3% of the Northwest Region's workforce can afford to purchase a median-priced home in their county.



**Figure IV-21.**  
**Purchase Affordability by Industry, Northwest Region, Counties, 2022**



Note: Affordability estimates assume a household spends 30% of its income on housing and assume a 30-year mortgage with a 7% interest rate, a 10% down payment, and 30% of monthly payment to property taxes, utilities, and insurance.

Source: Quarterly Census of Employment and Wages, Assessor data by the Wyoming Department of Revenue, and Root Policy Research.

**Rental vacancy.** Figure IV-22 below shows 2023 rental vacancy rates for counties in Wyoming's Northwest Region.<sup>3</sup> As data are not available for all multifamily units in each county, the final column in the table specifies the number of units reflected in the vacancy rate estimate. According to 2023 estimates, Fremont and Park counties have rental vacancy rates well below the 5% vacancy rate considered healthy for the rental market. Hot Springs has a rental vacancy rate close to the 5% vacancy rate considered healthy while Big Horn and Washakie have slightly higher rates.

**Figure IV-22.**  
**Multifamily Rental Vacancy**  
**Rate, Northwest Region,**  
**Counties, 2023 YTD**

**Note:**

Rates for Fremont and Park come from the Wyoming Rental Vacancy Survey. CoStar Multifamily units are defined as units in buildings of 5+ units.

**Source:**

CoStar, C&P Advisors Wyoming Rental Vacancy Survey, and Root Policy Research.

	Multifamily Vacancy Rate	Units Included
Big Horn	7.3%	119
Fremont	2.5%	652
Hot Springs	4.8%	145
Park	0.3%	1,788
Washakie	6.4%	115

**Mortgage loan activity.** Home Mortgage Disclosure Act (HMDA) data indicate loan originations and can be analyzed to understand shifts in home purchase activity by location, home value, occupancy type, and other factors. HMDA data only include home purchases that made use of a mortgage; home purchases made in cash, without a mortgage, are not included in the data. Therefore, the following estimates undercount the total volume of home purchases.

Figure IV-23 shows the volume of home loan originations by county in the Northwest Region from 2018 to 2022. The Northwest Region experienced a relatively low volume of home purchase loan originations in 2018 and 2019. Mortgage originations rose with low interest rates during the COVID-19 pandemic in 2020 and 2021. Mortgage originations fell below pre-pandemic levels alongside steep increases in interest rates in 2022.

<sup>3</sup> Vacancy data come from two sources: 1. Commercial real estate market analytics firm CoStar provides rental vacancy rates. CoStar collects data on vacancy rates for multifamily rental developments containing five or more units at the development level and aggregates these data to provide estimates at different geographic levels. 2. The Wyoming Rental Vacancy Survey (WRVS) which was undertaken on behalf of the Wyoming Community Development Authority, beginning in July 2023. The survey was designed to collect information regarding rentals throughout the State of Wyoming. Data were collected through systematic online data collection and telephone survey. In places where the coverage of this survey was higher than CoStar coverage, data from this survey were used instead.

**Figure IV-23.  
Home Loan  
Originations,  
Northwest Region,  
Counties, 2018-  
2022**

Note:  
Includes first lien loan  
originations only.

Source:  
HMDA and Root Policy Research.

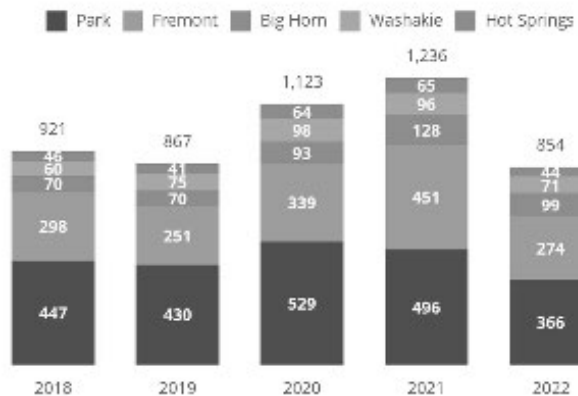


Figure IV-24 shows trends in the median home value for originated home purchase loans for each county in the Northwest Region and for Wyoming. The median home value for originated home purchase loans has increased overall since 2018 in each county of the Northwest Region. Park county is the only county in the Region for which the median home value for originated home purchase loans is greater than that of Wyoming. Park county also experienced the largest growth in median home value for originated loans.

**Figure IV-24.  
Median Home  
Value for  
Originated  
Home Purchase  
Loans,  
Northwest  
Region,  
Counties, 2018-  
2022**

Note:  
Includes first lien loan  
originations only.

Source:  
HMDA and Root Policy  
Research.

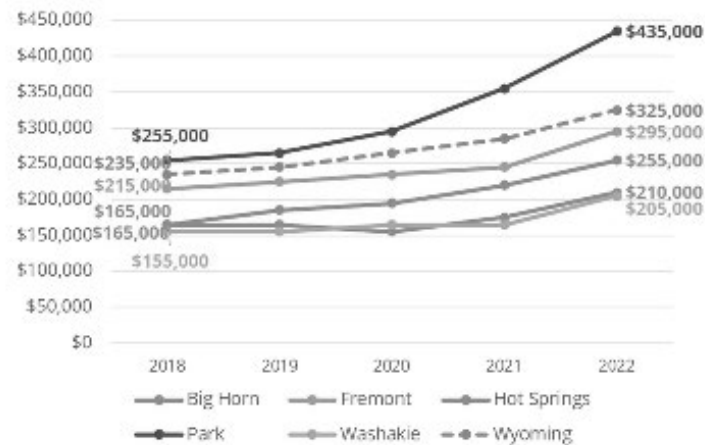


Figure IV-25 shows trends in property values for originated home purchase loans by occupancy type between 2018 and 2022. In the Northwest Region overall, second residences had the highest median value (\$395,000), followed by principal residences (\$335,000) and investment properties (\$315,000).

Holding with this trend, investment properties had the lowest median value in Park county, followed by principal residences and second homes. Median values for each occupancy type are higher in Park county than they are in the Northwest Region overall. Data are not available for second residences and investment properties in Big Horn, Fremont, Hot Springs, and Washakie counties due to too few loan originations for these occupancy categories.

In the Northwest Region, the percent increase in median values of investment properties was significantly larger than that of principal residences and second residences, 91% compared to 49% and 55%. Second residences saw the greatest percent increase in median values in Park county (+138%), followed by investment properties (+100%) and principal residences (+71%). Notably, the median values of homes in Park county appreciated at significantly greater rates than those in the Northwest Region for all occupancy types. This is consistent with Park county's status as a tourist destination. Property values for principal residences in Fremont, Hot Springs, and Washakie Counties appreciated at slower rates than those in the Northwest Region, while the median property value for principal residences in Big Horn county appreciated at a slightly higher rate than that for principal residences in the Northwest Region.

**Figure IV-25.**  
**Median Home Value for Originated Home Purchase Loans by Occupancy**  
**Type, Northwest Region, Counties, 2018-2022**

	Median Property Value		2018-2022 Change	
	2018	2022	Amount	Percent
<b>Big Horn</b>				
Principal residence	\$165,000	\$255,000	\$90,000	55%
Second residence	N/A	N/A	N/A	N/A
Investment property	N/A	N/A	N/A	N/A
<b>Fremont</b>				
Principal residence	\$215,000	\$295,000	\$80,000	37%
Second residence	N/A	N/A	N/A	N/A
Investment property	N/A	N/A	N/A	N/A
<b>Hot Springs</b>				
Principal residence	\$165,000	\$225,000	\$60,000	36%
Second residence	N/A	N/A	N/A	N/A
Investment property	N/A	N/A	N/A	N/A
<b>Park</b>				
Principal residence	\$255,000	\$435,000	\$180,000	71%
Second residence	\$280,000	\$665,000	\$385,000	138%
Investment property	\$175,000	\$350,000	\$175,000	100%
<b>Washakie</b>				
Principal residence	\$165,000	\$205,000	\$40,000	24%
Second residence	N/A	N/A	N/A	N/A
Investment property	N/A	N/A	N/A	N/A
<b>Northwest Region</b>				
Principal residence	\$225,000	\$335,000	\$110,000	49%
Second residence	\$255,000	\$395,000	\$140,000	55%
Investment property	\$165,000	\$315,000	\$150,000	91%

Note: Includes first lien loan originations only. Data are omitted for categories with fewer than 20 sales.

Source: HMDA and Root Policy Research.

Trends in home value by occupancy type for the Northwest Region are further illustrated in Figure IV-26. Between 2018 and 2022, principal residences saw the largest rise in median

value (\$150,000), followed closely by investment properties (\$140,000). Because around 90% of home loan originations in the Northwest Region are for principal residences, median values for home loan originations overall are equal to median values for principal residences.

**Figure IV-26.**  
**Median Home Value by Occupancy Type, Northwest Region, 2018-2022**

Note:  
Includes first lien loan originations only.

Source:  
HMDA and Root Policy Research.

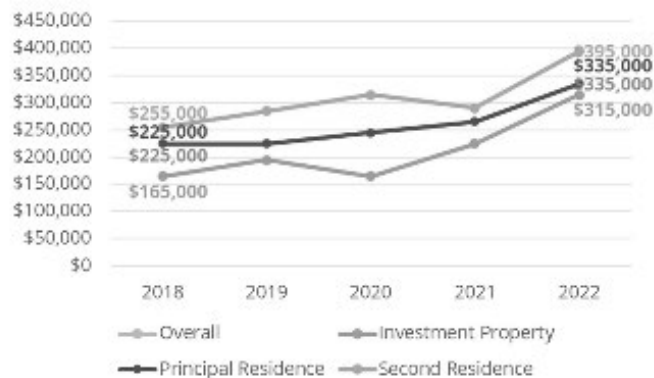
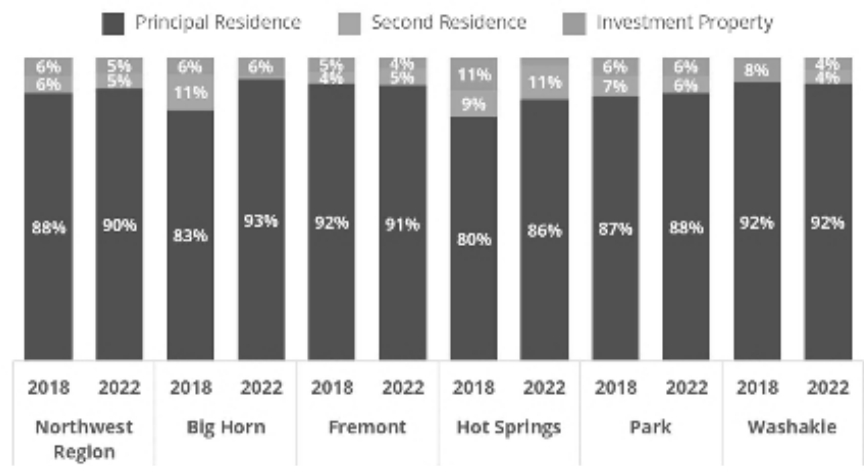


Figure IV-27 shows the composition of total loan originations by occupancy type for the Northwest Region and each of its counties between 2018 and 2022. In Hot Springs and Fremont counties, second residences accounted for the second largest share of loan originations as of 2022. In Big Horn county, investment properties had the second largest share of loan originations. In 2022, Washakie and Park counties, as well as the Northwest Region as a whole, had an equal share of total loan originations for investment properties and second homes.

**Figure IV-27.**  
**Distribution of Home Purchase Loan Originations by Occupancy Type and County, 2018 and 2022**



Note: Includes first lien originations only.  
Source: HMDA and Root Policy Research.

**Home sales.** Assessor data from Wyoming’s Department of Revenue details home sales for single family homes on ten acres or less for each county in Wyoming.

Figure IV-28 shows the median sales price for housing units sold in Wyoming’s Northwest Region in 2022. The median price for all housing units in the Region was \$275,000. Hot Springs, Washakie, Big Horn, and Fremont counties had median sales prices below the regional median. Hot Springs county had the lowest median sales price in the region at \$197,000. Park county was the only county with a median sales price higher than that of the Region at \$400,000.

In the Northwest Region, single family homes had the highest median price of any home type at \$285,000. Duplexes and modular and mobile homes had the second and third highest median prices at \$280,000 and \$250,000, respectively. Townhomes and condos had the lowest median price at \$210,000. Single family homes were more expensive at the median than modular and mobile homes in Fremont county and townhomes and condos in Park county, but data has been omitted for all other counties due to insufficient sales.

**Figure IV-28.**  
**Median Home Sales Price by Structure Type, Northwest Region, Counties,**  
**2022**

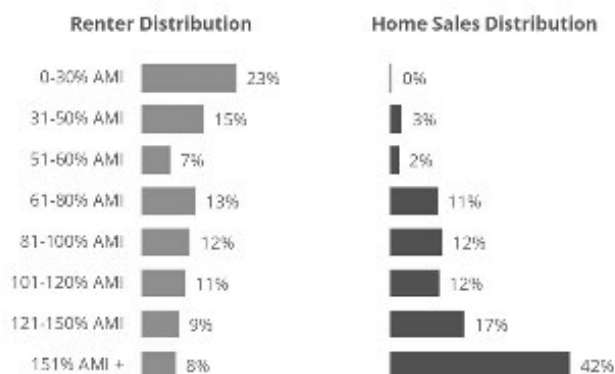
	Median Sales Price				
	All Units	Single Family	Duplex	Townhome/ Condo	Modular/ Mobile Home
<b>Northwest Region</b>	\$275,000	\$285,000	\$280,000	\$210,000	\$250,000
<b>Big Horn</b>	\$225,000	\$225,000	N/A	N/A	N/A
<b>Fremont</b>	\$261,000	\$269,950	N/A	N/A	\$241,250
<b>Hot Springs</b>	\$197,000	\$193,500	N/A	N/A	N/A
<b>Park</b>	\$400,000	\$420,000	N/A	\$220,000	N/A
<b>Washakie</b>	\$205,000	\$202,000	N/A	N/A	N/A

Note: Data are omitted for categories with fewer than 20 sales.

Source: Assessor data by the Wyoming Department of Revenue.

Figure IV-29 below shows the distribution of renters and home sales by Area Median Income (AMI). The renter distribution presents the distribution of renter incomes by AMI range, while the home sales distribution presents the distribution of homes sold affordable to households with such income levels without being cost burdened. The majority of the Northwest Region's renters have incomes below 80% AMI, while 84% of homes sold in 2022 were unaffordable to earners below 80% AMI.

**Figure IV-29.**  
**Renter and Affordable Home Sales Distribution by AMI, Northwest Region**



Note: Affordability estimates assume that a household spends 30% of their income on housing and assume a 30-year mortgage with a 7% interest rate, a 10% down payment, and 30% of monthly payment to property taxes, utilities, and insurance.

Source: 2021 5-year ACS, Assessor data by the Wyoming Department of Revenue, and Root Policy Research.



Figure IV-30 displays the shares of total single family homes and attached, modular, and mobile homes sold in 2022 that were affordable to buyers in each AMI range. While single family homes are concentrated in the highest affordability range, a greater share of attached, modular, and mobile homes are affordable to moderate income households. It is important to note that the region's housing stock is dominated by single family homes, so moderate income buyers interested in purchasing attached, modular, or mobile homes in their price ranges face significant supply constraints.

**Figure IV-30.**  
**Home Sales Distribution by AMI and Unit Type, Northwest Region, 2022**



Note: Affordability estimates assume that a household spends 30% of their income on housing and assume a 30-year mortgage with a 7% interest rate, a 10% down payment, and 30% of monthly payment to property taxes, utilities, and insurance.

Source: Assessor data by the Wyoming Department of Revenue and Root Policy Research.

## Housing Problems

**Cost burden.** The federal government, and most housing programs, consider housing as affordable when the housing payment—the rent or mortgage payment, plus taxes and utilities—consumes 30% or less of a household's gross income. Households who pay more than 30% are "cost burdened." This standard is derived from historically typical mortgage lending requirements and is also applied to renters.

Households experiencing cost burden have less money to spend on other essentials like healthcare, education, groceries, and transportation—adversely affecting their household well-being, limiting their economic growth potential, and constraining local spending.

Figure IV-31 shows the shares of renters and owners in Wyoming, the Northwest Region, and each Northwest Region county who experienced cost burden in 2010 and 2021. For

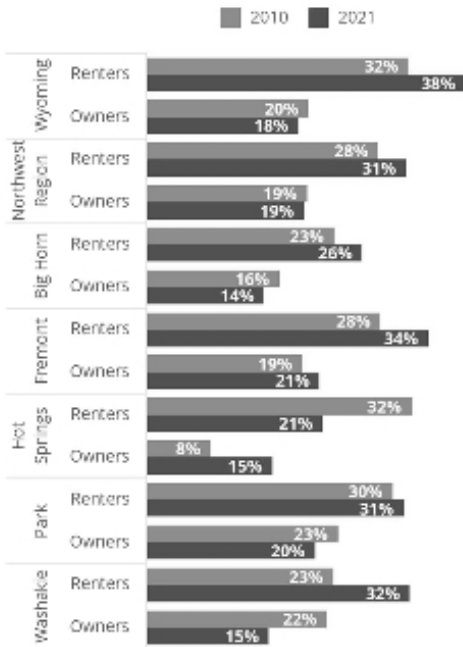
each year studied in each area studied, renters face cost burden at higher rates than homeowners do.

Between 2010 and 2021, the share of Wyoming renters experiencing cost burden rose by six percentage points from 32% to 38%, while the share of Wyoming homeowners experiencing cost burden decreased by two percentage points from 20% to 18%. At the same time, the share of Northwest Region renters experiencing cost burden increased by three percentage points from 28% to 31%, while the share of the Region's homeowners experiencing cost burden decreased by less than one percentage point. As of 2021, renters in the Northwest Region experience cost burden at a lower rate than renters in Wyoming, while homeowners in the Northwest Region experience cost burden at a slightly higher rate than homeowners in Wyoming.

As of 2021, renters in Hot Springs county experience cost burden at the lowest rate for renters in the region (21%), while renters in Fremont county experience the highest rate of cost burden (34%). Homeowners in Big Horn county have the lowest rate of cost burden for owners in the region (14%), while homeowners in Fremont county have the highest rate of cost burden in the region (21%).

**Figure IV-31.**  
**Cost Burden by Tenure,**  
**Wyoming, Northwest**  
**Region, Counties, 2010**  
**and 2021**

Source:  
2010 and 2021 5-year ACS estimates and  
Root Policy Research.



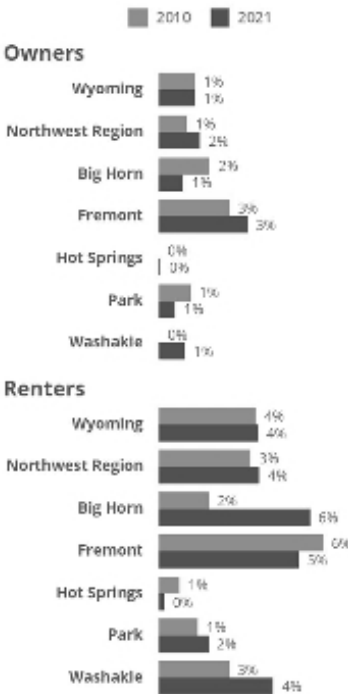
**Overcrowding.** Housing units are considered overcrowded when they are occupied by more than one person per room. Figure IV-32 illustrates the rate of overcrowding by tenure for Wyoming, the Northwest Region, and the counties of the Northwest Region.

Overcrowding has been stable overall for Wyoming’s owner and renter households between 2010 and 2021, but it has increased for both owners and renters in the Northwest Region. Over the time studied, overcrowding increased for owners in Fremont, Hot Springs, and Washakie counties, as well as for renters in Big Horn, Park, and Washakie counties.

Renter households experience overcrowding at four times the rate of owner households in Wyoming and at greater rates than owner households in the Northwest Region and each of its counties.

**Figure IV-32.**  
**Overcrowding by Tenure,**  
**Wyoming, Northwest**  
**Region, Counties, 2010 and**  
**2021**

Source:  
ACS 2021 5-year estimates and Root Policy  
Research.



**Short Term Rental Market**

Short-term rentals, or STRs, play a unique role within housing markets, especially those with a large tourism industry, as they can provide economic benefit (to homeowners through rental revenue and the City through sales tax/tourism revenue) but may disrupt the long-term rental market if they account for a substantial portion of the total housing stock.

**Fremont County, Lander, and Dubois.** Home to the towns of Lander and Dubois, Fremont county is a popular tourist destination. According to data from AirDNA.com (a market analytics website for short term rentals), there are 279 homes listed as short-term rentals (STRs) in Fremont county<sup>4</sup>. As shown in Figure IV-33 below, 123 of these STRs are in Dubois, while 94 are in Lander<sup>5</sup>. STR units, which may be active or inactive at the time of reporting, account for 1.7% of total housing stock in Lander and 8.7% of total housing stock in Dubois<sup>6</sup>. This suggests that in Dubois, STRs likely constrict housing supply and increase rents and home purchase prices.

**Figure IV-33.  
Short Term Rental  
Units by ZIP Code,  
Fremont County,  
Dubois, and Lander,  
2023**

Note:  
Fremont county as presented in this section consists of the following ZIP Codes: 82310, 82501, 82510, 82512, 82513, 82514, 82515, 82516, 82520, 82523, 82524, 82642, and 82649.  
Dubois is represented by ZIP Code 82513. Lander is represented by ZIP Code 82520.  
This map uses ZIP Code Tabulation Areas (ZCTAs) from the U.S. Census Bureau to approximate ZIP Code boundaries. ZCTAs do not exist for uninhabited areas or areas with very few addresses. ZIP Codes without corresponding ZCTAs have not been mapped.  
Source:  
AirDNA.com

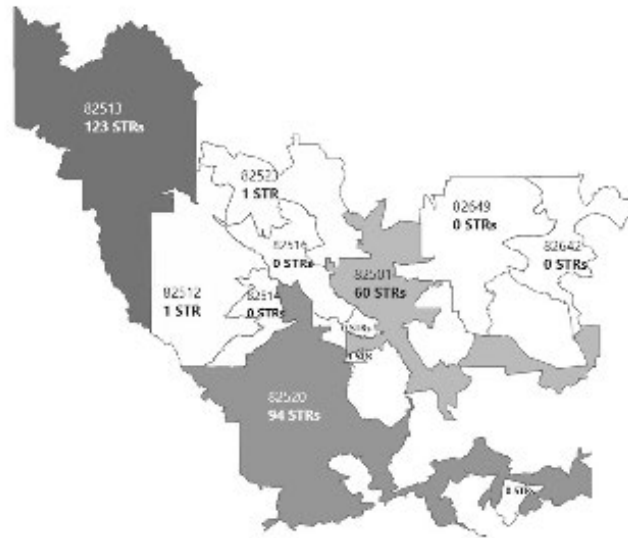


Figure IV-34 below demonstrates the increase in the number of active STRs in Fremont county in November of each year, 2020-2023. Note that STR activity is seasonal, with higher activity typically observed in the summer months.

<sup>4</sup> AirDNA.com provides market analytics for STRs by ZIP Code. Because some ZIP Codes cross county lines, it is not possible to provide an exact picture of the STR market in Fremont county. In this section, Fremont county consists of the following ZIP codes: 82310, 82501, 82510, 82512, 82513, 82514, 82515, 82516, 82520, 82523, 82524, 82642, and 82649.

<sup>5</sup> In this section, Dubois is represented by ZIP Code 82513. Lander is represented by ZIP Code 82520.

<sup>6</sup> According to 2022 5-year ACS estimates, there are 1,419 housing units in the 82513 (Dubois) ZIP Code Tabulation Area and 5,640 housing units in the 82520 (Lander) ZIP Code Tabulation Area.

**Figure IV-34.**  
**Active Short Term**  
**Rental Units,**  
**Fremont County,**  
**2020-2023**

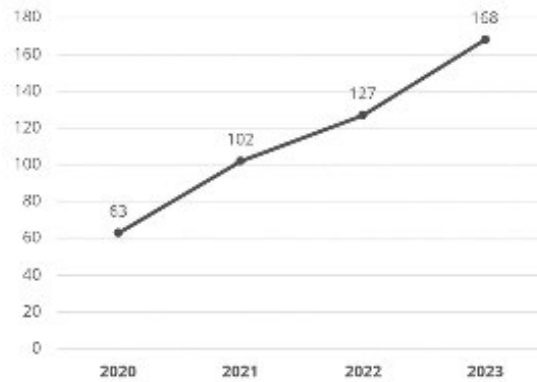
Note:

Counts reflect units available in November of each year.

Fremont county as presented in this section consists of the following ZIP Codes: 82310, 82501, 82510, 82512, 82513, 82514, 82515, 82516, 82520, 82523, 82524, 82642, and 82649.

Source:

AirDNA.com



As shown in Figure IV-35, 62% of short term rentals in Fremont county are available for fewer than 180 nights per year. These are considered part-time STRs, some of which may be permanently occupied and rented occasionally, and others of which may be rented consistently and otherwise vacant or used seasonally.

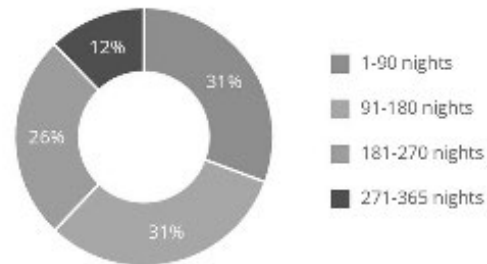
**Figure IV-35.**  
**Short Term Rental**  
**Units by Annual**  
**Availability, Fremont**  
**County, 2023**

Note:

Fremont county as presented in this section consists of the following ZIP Codes: 82310, 82501, 82510, 82512, 82513, 82514, 82515, 82516, 82520, 82523, 82524, 82642, and 82649.

Source:

AirDNA.com



According to AirDNA.com, 88% of STRs in Fremont county are entire homes and 11% are private rooms. Less than 1% are shared rooms. Figure IV-36 below shows the distribution of the county's STRs by number of bedrooms. 36% of STRs in the county have 1 bedroom, 34% have 2 bedrooms, and 22% have 3 bedrooms.

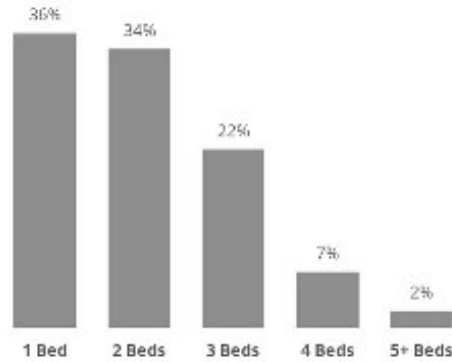
**Figure IV-36.**  
**Short Term Rental**  
**Units by Number of**  
**Bedrooms, Fremont**  
**County, 2023**

Note:

Fremont county as presented in this section consists of the following ZIP Codes: 82310, 82501, 82510, 82512, 82513, 82514, 82515, 82516, 82520, 82523, 82524, 82642, and 82649.

Source:

AirDNA.com



**Park County and Cody.** Park County is home to the city of Cody and much of Yellowstone National Park. According to data from AirDNA.com (a market analytics website for short term rentals), there are 499 homes listed as short-term rentals (STRs) in Cody<sup>7</sup> and 634 STRs in Park county<sup>8</sup>. Cody's STRs, which may be active or inactive at the time of reporting, account for 6.2% of its total housing stock<sup>9</sup>.

Figure IV-37 below maps the volume of STRs in Park county's ZIP Codes. Most STRs in Park county are located within Cody's ZIP Code, 82834, though there is also a relatively high concentration of STRs in 82435, the ZIP Code of Powell, WY.

<sup>7</sup> AirDNA.com provides market analytics for STRs by ZIP Code. ZIP Code boundaries do not entirely align with city or county boundaries. In this section, Cody is represented by its main ZIP Code, 82414.

<sup>8</sup> AirDNA.com provides market analytics of short term rentals (STRs) by ZIP Code. Because some ZIP Codes cross county lines, it is not possible to provide an exact picture of the STR market in Park county. Park county as presented in this section consists of the following ZIP Codes: 82414, 82435, 82433, 82190, 82421, 82423, 82440, and 82450.

<sup>9</sup> According to 2022 5-year ACS estimates, there are 8,023 total housing units in the 82414 ZIP Code Tabulation Area.

**Figure IV-37.  
Short Term Rental  
Units by ZIP Code,  
Park County and  
Cody, 2023**

Note:  
Park county as presented in this section  
consists of the following ZIP Codes:  
82414, 82435, 82433, 82190, 82421,  
82423, 82440, and 82450.

The city of Cody is defined as the ZIP  
Code 82414.

This map uses ZIP Code Tabulation  
Areas (ZCTAs) from the U.S. Census  
Bureau to approximate ZIP Code  
boundaries. ZCTAs do not exist for  
uninhabited areas or areas with very  
few addresses. ZIP Codes without  
corresponding ZCTAs have not been  
mapped.

Source:  
AirDNA.com

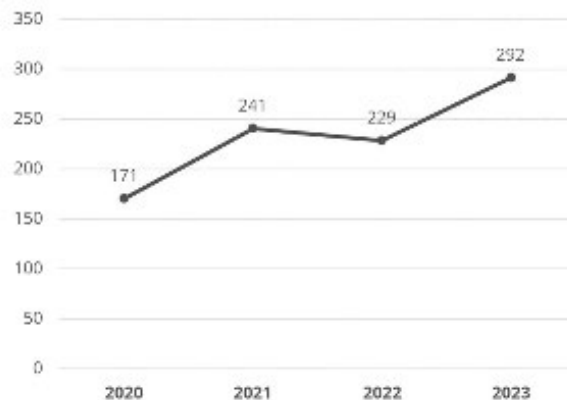


Figure IV-38 below demonstrates the overall increase in the number of active STRs in November from 2020 to 2023. Note that STR activity is seasonal, with higher activity typically observed in the summer months.

**Figure IV-38.  
Active Short Term  
Rental Units, Park  
County, 2020-2023**

Note:  
Counts reflect units available in  
November of each year.  
Park county as presented in this  
section consists of the following ZIP  
Codes: 82414, 82435, 82433, 82190,  
82421, 82423, 82440, and 82450.

Source:  
AirDNA.com

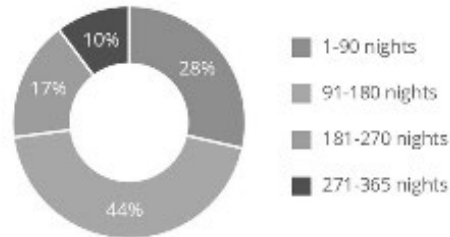


As shown in Figure IV-39, 72% of short term rentals in Park county are available for fewer than 180 nights per year. These are considered part-time STRs, some of which may be permanently occupied and rented occasionally, and others of which may be rented consistently and otherwise vacant or used seasonally.

**Figure IV-39.**  
**Short Term Rental**  
**Units by Annual**  
**Availability, Park**  
**County, 2023**

Note:  
 Park county as presented in this section consists of the following ZIP Codes: 82414, 82435, 82433, 82190, 82421, 82423, 82440, and 82450.

Source:  
 AirDNA.com

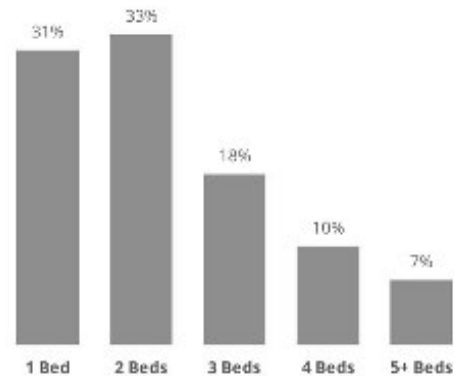


According to AirDNA.com, 92% of STRs in Park county are entire homes and 8% are private rooms. Figure IV-40 below shows the distribution of STRs by number of bedrooms. 31% of STRs in the county have 1 bedroom, 33% have 2 bedrooms, 18% have 3 bedrooms, and 10% have 4 bedrooms.

**Figure IV-40.**  
**Short Term Rental**  
**Units by Number of**  
**Bedrooms, Park**  
**County, 2023**

Note:  
 Park county as presented in this section consists of the following ZIP Codes: 82414, 82435, 82433, 82190, 82421, 82423, 82440, and 82450.

Source:  
 AirDNA.com



## Housing Needs Projections

This section estimates the number of housing units needed to accommodate household growth through 2030, using population projections prepared by the Wyoming Economic Analysis Division.

Figure IV-41 shows two estimates of the number of housing units each county in the Northwest Region needs to add to accommodate household growth and replace the loss in the housing stock. The first estimate assumes a housing loss of 0.24% every two years, and



the second estimate assumes a housing loss of 1.7% every two years.<sup>10</sup> Estimates are shown as totals and by AMI, based on the state's AMI distribution provided by recent data from HUD's Comprehensive Housing Affordability Strategy (CHAS).

The estimates indicate that by 2030, between 791 and 1,740 total housing units will be needed to accommodate Park county households, between 465 and 1,613 units will be needed to accommodate Fremont county households, and between 394 and 745 units will be needed to accommodate Big Horn county households. To keep up with population growth, Washakie county must add 113 to 365 units, while Hot Springs county must add 40 to 206 units.

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<sup>10</sup> According to the last Components of Inventory Change Report produced by HUD in 2017, which used American Housing Survey data, it was estimated that between 2015 and 2017, about 0.24% of the national housing stock was lost through demolitions or disasters alone. According to a Brookings Institute report, the two-year housing loss over the period 1985-2013 was 1.7% in the West region of the country (<https://www.brookings.edu/articles/unpacking-the-housing-shortage-puzzle/#:~:text=Churn%20is%20the%20sum%20of,built%20homes%20and%20no%20demolitions>).

**Figure IV-41.**  
**Projected Housing Units Needed Between 2021 and 2030 by Tenure and**  
**AMI, Northwest Region, Counties**

	Renters		Homeowners		Total	
	Estimate 1	Estimate 2	Estimate 1	Estimate 2	Estimate 1	Estimate 2
<b>Big Horn</b>	<b>100</b>	<b>189</b>	<b>294</b>	<b>555</b>	<b>394</b>	<b>745</b>
0%-30% AMI	19	35	24	46	43	81
31%-50% AMI	29	56	40	76	70	132
51%-80% AMI	21	40	71	133	92	173
81%-100% AMI	12	23	41	77	53	100
100% + AMI	19	35	118	224	137	259
<b>Fremont</b>	<b>140</b>	<b>484</b>	<b>326</b>	<b>1,129</b>	<b>465</b>	<b>1,613</b>
0%-30% AMI	32	110	33	116	65	226
31%-50% AMI	27	92	30	103	56	195
51%-80% AMI	39	135	67	231	106	366
81%-100% AMI	12	40	41	142	53	182
100% + AMI	31	106	155	538	186	644
<b>Hot Springs</b>	<b>12</b>	<b>60</b>	<b>29</b>	<b>147</b>	<b>40</b>	<b>206</b>
0%-30% AMI	3	17	2	12	6	29
31%-50% AMI	2	9	4	19	6	28
51%-80% AMI	2	12	5	25	7	37
81%-100% AMI	2	13	2	11	5	24
100% + AMI	2	9	15	79	17	88
<b>Park</b>	<b>209</b>	<b>460</b>	<b>581</b>	<b>1,279</b>	<b>791</b>	<b>1,740</b>
0%-30% AMI	26	57	34	75	60	133
31%-50% AMI	43	95	60	133	103	228
51%-80% AMI	42	93	99	218	141	311
81%-100% AMI	26	58	87	191	113	249
100% + AMI	71	156	301	662	372	818
<b>Washakie</b>	<b>30</b>	<b>98</b>	<b>82</b>	<b>266</b>	<b>113</b>	<b>365</b>
0%-30% AMI	5	16	7	21	12	38
31%-50% AMI	6	20	7	24	13	44
51%-80% AMI	10	34	17	55	27	89
81%-100% AMI	4	12	12	38	15	50
100% + AMI	5	16	40	128	45	144

Note: Holds latest CHAS tenure and income distribution constant.

Source: HUD CHAS 2020 estimates, American Housing Survey, and Root Policy Research.

## Recommendations from Previous Studies

**The 2015 Town of Greybull Housing Study and Master Plan**<sup>11</sup> provided specific land use recommendations designed to inform how community and housing needs can be accommodated to the greatest benefit of the community with focus on one particular development site. To address needs, the concept calls for a mix of uses including single and multiple family residential as well as a commercial component taking advantage of site assets such as accessibility and visibility along the highway frontage while leaving the remaining land that holds development restrictions as open/ recreational space.

**The 2010 Park County Housing Assessment**<sup>12</sup> analyses housing needs in the City of Cody, the City of Powell, the Town of Meeteetse, and the unincorporated area of Park County. A summary of recommended strategies to address housing needs in the report includes:

- Encouraging real estate developers to invest in future residential development projects and expand residential expansion opportunities in Meeteetse.
- Encourage the development of more affordable housing by:
  - Identifying mobile home rental areas in Cody and Powell and discussing incentives with landowners. These incentives should encourage replacing older rentals with new residential apartments, new manufactured homes, or new self-help housing.
  - Relax subdivision requirements and revise zoning ordinances to facilitate project approvals.
  - Seek opportunities for participation in the U.S. Department of Agriculture Section 502 and 523 Mutual Self-Help Housing Programs. Expand program capacity by clarifying and discussing program responsibilities and opportunities with representatives of USDA, Rural Development and Rural Community Assistance Corporation, which provides technical assistance to program grantees in the western United States.
  - Prepare and sponsor infrastructure grant requests for the construction of additional infrastructure.
- Monitor senior housing capacities and encourage potential investors to develop new senior housing complexes in areas with readily available and accessible medical services when facilities reach capacity.

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<sup>11</sup> <https://drive.google.com/file/d/1A9gC2RvupUF1UDs7AVxWjal7lyj9l4Va/view?usp=sharing>

<sup>12</sup> <https://www.codywy.gov/DocumentCenter/View/292/Final-Report-2010-Housing-Assessment-Park-County?bidId=>

- Privatize student housing at Northwest College and monitor enrollment trends and prepare RFPs for new housing when necessary. Negotiate terms with selected developer and monitor construction.
- Encourage real estate development in City of Powell by removing unnecessary regulatory barriers. Consider introducing a mixed residential and commercial zoning district for the downtown area that will enable landowners to develop residential housing on the second floor of commercial buildings, which will generate additional income from a small upstairs apartment and ground floor retail. Upstairs apartments can also serve as accommodation for commercial lessees or employees, keeping investments financially viable for landowners.

## Appendix

The following tables show AMI limits by county, examples of establishment types by industry, and federal poverty thresholds by household size.

**Figure IV-42.**  
**AMI Limits, Northwest Region, Counties, 2021**

2021 2-person AMI	Big Horn	Fremont	Hot Springs	Park	Washakie
30% AMI	\$19,440	\$19,440	\$19,440	\$19,440	\$19,440
50% AMI	\$32,400	\$32,400	\$32,400	\$32,400	\$32,400
80% AMI	\$25,920	\$25,920	\$25,920	\$25,920	\$25,920
100% AMI	\$64,800	\$64,800	\$64,800	\$64,800	\$64,800
120% AMI	\$77,760	\$77,760	\$77,760	\$77,760	\$77,760

Source: U.S. Department of Housing and Urban Development.

**Figure IV-43.**  
**AMI Limits, Northwest Region, Counties, 2022**

2022 2-person AMI	Big Horn	Fremont	Hot Springs	Park	Washakie
30% AMI	\$21,030	\$21,030	\$21,030	\$21,030	\$21,030
50% AMI	\$35,050	\$35,050	\$35,050	\$35,050	\$35,050
80% AMI	\$28,040	\$28,040	\$28,040	\$28,040	\$28,040
100% AMI	\$70,100	\$70,100	\$70,100	\$70,100	\$70,100
120% AMI	\$84,120	\$84,120	\$84,120	\$84,120	\$84,120

Source: U.S. Department of Housing and Urban Development.

**Figure IV-44.**  
**QCEW Establishment Examples by Industry**

Establishment Examples	
<b>Goods Producing</b>	
<b>Natural Resources &amp; Mining</b>	Farms, ranches, dairies, greenhouses, nurseries, orchards, hatcheries, mine operation and mining support activities.
<b>Construction</b>	General contractors, design-builders, construction managers, turnkey contractors.
<b>Manufacturing</b>	Plants, factories, mills.
<b>Service Providing</b>	
<b>Trade, Transportation, &amp; Utilities</b>	Wholesale merchants, distributors, shippers, import/export merchants, office supply retailers, computer and software retailers, building materials dealers, plumbing supply retailers, electrical supply retailers, electric power, natural gas, steam supply, water supply, and sewage removal.
<b>Information</b>	Software publishing, broadcasting and content providers, telecommunications, computing infrastructure providers, data processing, Web hosting.
<b>Financial Activities</b>	Commercial banks, credit unions, rental and leasing services.
<b>Professional &amp; Business Services</b>	Legal advice and representation, accounting, bookkeeping, payroll services, architectural, engineering, consulting services.
<b>Education &amp; Health Services</b>	Schools, colleges, universities, hospitals, nursing care facilities.
<b>Leisure &amp; Hospitality</b>	Hotels, restaurants, gambling establishments.
<b>Other Services</b>	Equipment and machinery repairing, grantmaking, advocacy, and providing drycleaning and laundry services, personal care services.
<b>Public Administration</b>	Federal, state, and local government agencies.

Source: BLS Quarterly Census of Employment and Wages.

**Figure IV-45.**  
**Federal Poverty Thresholds by Household Size, 2010**

Size of Family Unit	Weighted Average Thresholds	Related Children Under 18 Years								
		None	One	Two	Three	Four	Five	Six	Seven	Eight or More
One person (unrelated individual)	\$11,139									
Under 65 years	\$11,344	\$11,344								
65 years and over	\$10,458	\$10,458								
Two people	\$14,218									
Householder under 65 years	\$14,676	\$14,602	\$15,030							
Householder 65 years and over	\$13,194	\$13,180	\$14,973							
Three people	\$17,374	\$17,057	\$17,552	\$17,568						
Four people	\$22,314	\$22,491	\$22,859	\$22,113	\$22,190					
Five people	\$26,439	\$27,123	\$27,518	\$26,675	\$26,023	\$25,625				
Six people	\$29,897	\$31,197	\$31,320	\$30,675	\$30,056	\$29,137	\$28,591			
Seven people	\$34,009	\$35,896	\$36,120	\$35,347	\$34,809	\$33,805	\$32,635	\$31,351		
Eight people	\$37,934	\$40,146	\$40,501	\$39,772	\$39,133	\$38,227	\$37,076	\$35,879	\$35,575	
Nine people or more	\$45,220	\$48,293	\$48,527	\$47,882	\$47,340	\$46,451	\$45,227	\$44,120	\$43,845	\$42,156

Source: U.S. Census Bureau.

**Figure IV-46.**  
Federal Poverty Thresholds by Household Size, 2021

Size of Family Unit	Weighted Average Thresholds	Related Children Under 18 Years								
		None	One	Two	Three	Four	Five	Six	Seven	Eight or More
One person (unrelated individual)	\$13,788									
Under 65 years	\$14,097	\$14,097								
65 years and over	\$12,996	\$12,996								
Two people	\$17,529									
Householder under 65 years	\$18,231	\$18,145	\$18,677							
Householder 65 years and over	\$16,400	\$16,379	\$18,606							
Three people	\$21,559	\$21,196	\$21,811	\$21,831						
Four people	\$27,740	\$27,949	\$28,406	\$27,479	\$27,575					
Five people	\$32,865	\$33,705	\$34,195	\$33,148	\$32,338	\$31,843				
Six people	\$37,161	\$38,767	\$38,921	\$38,119	\$37,350	\$36,207	\$35,529			
Seven people	\$42,156	\$44,606	\$44,885	\$43,925	\$43,255	\$42,009	\$40,554	\$38,958		
Eight people	\$47,093	\$49,888	\$50,329	\$49,423	\$48,629	\$47,503	\$46,073	\$44,585	\$44,207	
Nine people or more	\$56,325	\$60,012	\$60,303	\$59,501	\$58,828	\$57,722	\$56,201	\$54,826	\$54,485	\$52,386

Source: U.S. Census Bureau.

## SECTION V.

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### SOUTHEAST REGION



## SECTION V. Southeast Region

This regional summary provides demographic, economic, and housing market data for the Southeast Region. Wyoming's Southeast Region is comprised of Albany county, Goshen county, Laramie county, Niobrara county, and Platte county.

### Southeast Region



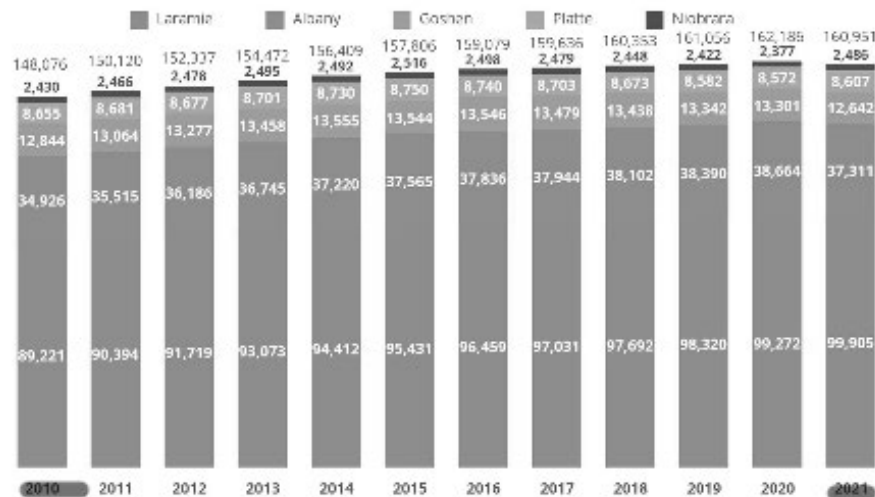
### Demographic Trends

**Population growth.** The population of Wyoming's Southeast Region grew by around 8.7% from 2010 to 2021 as the State of Wyoming's population grew by around 5.7%. As shown in Figure V-1, the Southeast Region's population increased from 148,076 residents in 2010 to 160,951 residents in 2021. The Region's population increased in each year studied until 2021, when the population decreased by 1,235 residents (less than 1%). Meanwhile, the State of Wyoming's population grew each year from 2010 to 2017 and has modestly decreased since.

As of 2021, Wyoming's Southeast Region is home to the most and least populous counties in the state—Laramie county and Niobrara county. The cities of Cheyenne, home to the state's capitol, and Laramie, home to the University of Wyoming, are both located in Southeast Region counties (Laramie county and Albany county, respectively).

Laramie county and Albany county, the two most populous counties in the state, saw the largest growth in population between 2010 and 2021 at 12.0% and 6.8% respectively, indicating that the Region's most metropolitan counties are also its fastest growing counties. Niobrara county's population saw a slight increase over the time studied, while Platte county and Goshen county saw their populations decrease. Goshen county had the most significant decrease in population between 2010 and 2021 at -1.6%.

**Figure V-1.**  
**Population, Southeast Region, 2010-2021**

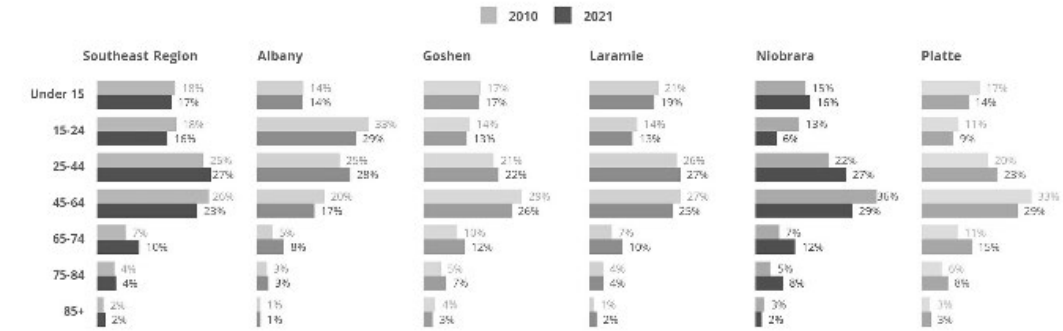


Source: 2010-2021 5-year ACS and Root Policy Research.

Laramie county experienced positive annual population growth for every year studied as Albany county experienced positive annual growth in each year except for 2021. Goshen, Niobrara, and Platte counties experienced positive or zero annual population growth until entering prolonged periods of zero or negative annual population growth beginning in the mid- to late- 2010s.

**Age distribution.** As shown in Figure V-2, between 2010 and 2021, the Southeast Region's share of residents aged 65 and older increased by around four percentage points from 12% to 16%. The share of residents aged 65 and older increased in each county in the Southeast Region, with the most dramatic increases taking place in Niobrara and Platte counties at 8 percentage points and 7 percentage points, respectively. At the same time, the Region's share of residents aged 25-64 remained relatively stable. The Southeast Region's growing senior population underscores the importance of aging-friendly housing options moving forward, especially in Niobrara and Platte counties.

**Figure V-2.**  
**Age Distribution, Southeast Region, 2010 and 2021**

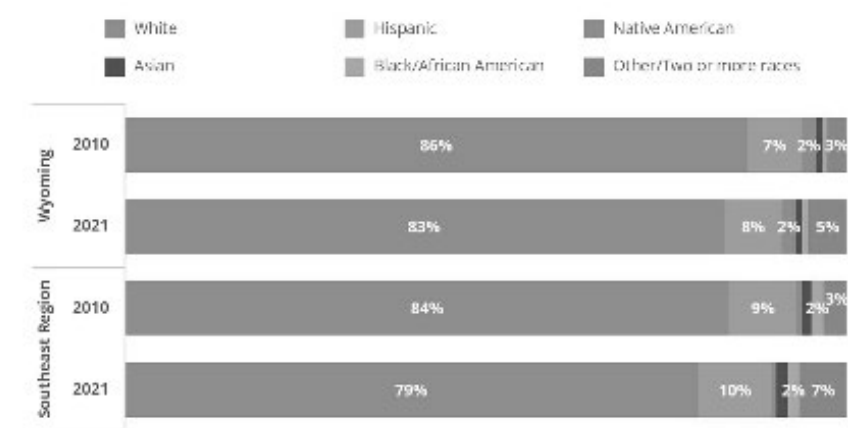


Source: 2010 and 2021 5-year ACS and Root Policy Research.

**Racial and ethnic distribution.** Figure V-3 shows the racial and ethnic distributions of the populations of Wyoming and Wyoming’s Southeast Region. While the Southeast Region’s population resembles that of Wyoming in terms of race and ethnicity, several differences are apparent. While 83% of Wyoming’s residents identify as non-Hispanic White compared to 79% of residents in the Southeast Region. The Southeast Region is home to slightly larger shares of Hispanic residents, Asian residents, Black/African American residents, and residents identifying as other/two or more races than Wyoming is.

The Southeast Region’s population has become more racially and ethnically diverse since 2010. The share of non-Hispanic White residents has decreased by five percentage points, while the shares of the population identifying as Hispanic and other/two or more races increased by one and four percentage points, respectively.

**Figure V-3.**  
**Race and Ethnicity, Wyoming and Southeast Region, 2010 and 2021**

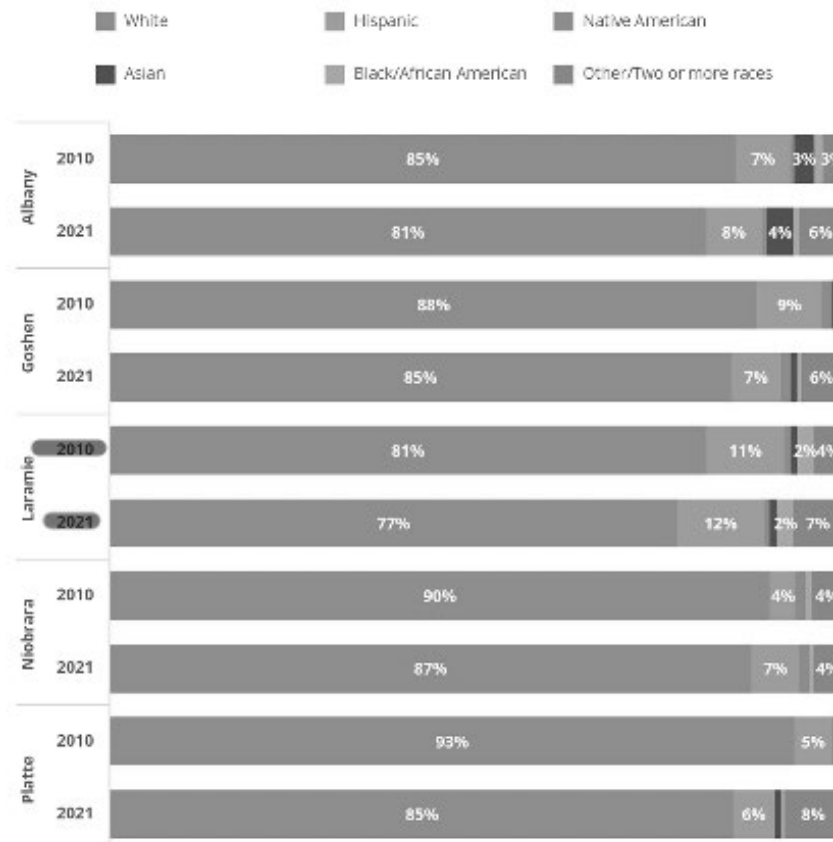


Note: The categories White, Native American, Asian, Black/African American, and Other/Two or more races include only non-Hispanic. The Hispanic category refers to Hispanics of any race. 0% and 1% labels are not shown.  
Source: 2010 and 2021 5-year ACS and Root Policy Research.

Figure V-4 shows racial and ethnic distributions for each county within the Southeast Region in 2010 and 2021. The Southeast Region and each of its constituent counties have become more racially and ethnically diverse since 2010. Laramie county is the most racially and ethnically diverse county within the Southeast Region, while Niobrara county is the least racially and ethnically diverse county in the Region.

Laramie county is home to the Region’s largest shares of Hispanic and Black/African American residents, while Albany county is home to the region’s largest share of Asian residents. Goshen county and Platte county saw their shares of residents identifying as other/two or more races increase from 1% to 6% and 8%, respectively.

**Figure V-4.**  
**Race and Ethnicity, Southeast Region, Counties 2010 and 2021**



Note: The categories White, Native American, Asian, Black/African American, and Other/Two or more races include only non-Hispanic. The Hispanic category refers to Hispanics of any race. 0% and 1% labels are not shown.

Source: 2010 and 2021 5-year ACS and Root Policy Research.

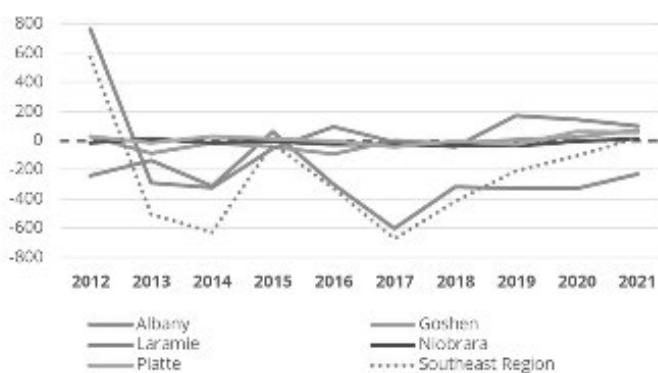
**Migration.** Figure V-5 shows net migration data based on year-to-year address changes reported on individual income tax returns filed with the IRS for each county in Wyoming's Southeast Region from 2012 to 2021. Net migration<sup>1</sup> in the Southeast Region was positive

<sup>1</sup> Net migration is the difference between inflows and outflows, where inflows represent the number of new households who filed a return in the county and filed a return in a different county the previous year and outflows are the number of households who filed a return in a county other than the specified county and had filed a return in the

in 2012, negative each year from 2013 to 2020, and slightly positive in 2021. Over the time studied, the Southeast Region had a net migration of -2,274 households.

**Figure V-5.  
Net Migration,  
Southeast  
Region, Counties,  
2012-2021**

Source:  
Internal Revenue Service and  
Root Policy Research.



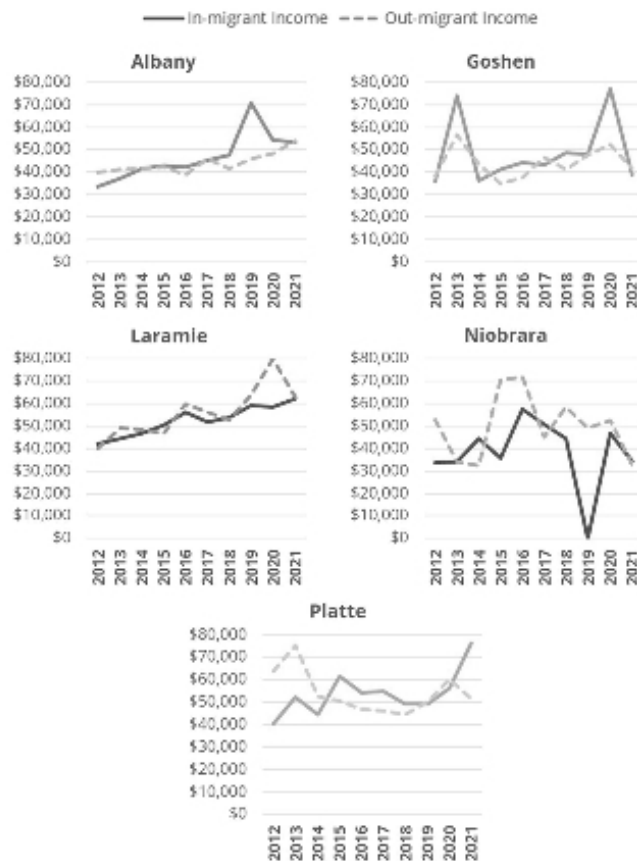
IRS data also provide the total adjusted gross income, which allows the estimation of the average adjusted gross income<sup>2</sup> for inflow and outflow returns each year. Figure V-6 shows the difference between the average income of in-migrants and the average income of out-migrants for each county in the Southeast Region from 2012 to 2021 to identify migration-driven trends in income. It should be noted that these are averages and can be skewed by a small number of very high income households in some of the years. Key trends are outlined here:

- Since 2018, in-migrants to Albany and Goshen counties have had higher average incomes than out-migrants from these counties.
- In Niobrara county out-migrant households have had higher average incomes than its in-migrant households in all years since 2018 except for 2021.
- In Laramie county the average income of out-migrants has been higher than the average income of in-migrants since 2019.
- Platte county's in-migrants have had higher average incomes than its out-migrants for all years since 2015 except for 2019 and 2020.

specified county the previous year. Tax returns where the taxpayer was claimed as a dependent on another tax return in the second year are excluded. Tax returns where the taxpayer was claimed as a dependent in the first year and filed in the second year as a non-dependent taxpayer are included; therefore, college students are included if they filed a tax return and were not claimed as a dependent.

<sup>2</sup> Adjusted Gross Income (AGI) is defined as gross income minus adjustments to income. Gross income includes your wages, dividends, capital gains, business income, retirement distributions as well as other income. Adjustments to Income include such items as Educator expenses, Student loan interest, Alimony payments or contributions to a retirement account.

**Figure V-6.**  
**Average Income of In-migrants and Out-migrants, Southeast Region,**  
**Counties 2012-2021**



Source: Internal Revenue Service and Root Policy Research.

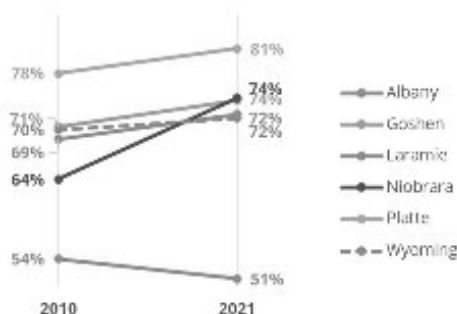
**Homeownership.** Homeownership rates for each county in the Southeast Region are shown in Figure V-7. As of 2021, Platte county has the highest homeownership rate in the Region. Platte, Niobrara, Goshen, and Laramie counties have homeownership rates higher than Wyoming's 72% homeownership rate. Albany's 51% homeownership rate is the lowest of any county in Wyoming.

Between 2010 and 2021, homeownership rates increased in Goshen, Laramie, and Platte counties by three percentage points each. Albany county's homeownership rate fell by three percentage points from 54% to 51% over the time studied.

While it is estimated that Niobrara county saw a ten percentage point increase in homeownership over the time studied, it should be noted that this county's estimated homeownership rate had substantial margins of error in both 2010 and 2021. The populations of all counties in the region have aged since 2010, but Niobrara county saw the greatest increase in the share of the population aged 65+ (+8 percentage points). As individuals aged 65+ are more likely to be homeowners, this could result in an increased homeownership rate for Niobrara county.

**Figure V-7.**  
**Homeownership Rates,**  
**Southeast Region, Counties**  
**2010 and 2021**

Source:  
2010 and 2021 5-year ACS and Root Policy  
Research.



**Income and poverty.** Figure V-8 shows median income for homeowners and renters in each county in Wyoming's Southeast Region. Key trends in median income by tenure are outlined here.

- In 2021, median renter income as a share of median owner income varies from around 34% in Albany county to around 77% in Niobrara county. Between 2010 and 2021, median income decreased as a share of owner income in Platte county, remained stable as a share of owner income in Albany, Goshen, and Laramie counties, and increased as a share of owner income in Niobrara county.
- From 2010 to 2021, median income for both owners and renters increased in Albany, Goshen, Laramie, and Platte counties. These increases may be partially migration-driven in Albany and Goshen counties as these counties received in-migrants with higher median incomes than those of their out-migrants in most years.
- Median income increased for renters and decreased for owners in Niobrara county over the time studied.
- In 2021, median incomes for homeowners in Albany and Laramie counties, the most populous counties in the Region, are higher than that of homeowners in Wyoming. Homeowner median incomes are lower than that of Wyoming in Goshen, Niobrara, and Platte counties. Niobrara County has the lowest median homeowner income of any county in Wyoming.



- Renter median incomes are lower than Wyoming's median renter income in Albany, Goshen, and Platte counties. In fact, Platte County has the lowest median renter income of any county in Wyoming. Renters in Niobrara and Laramie counties have median incomes higher than renters in Wyoming.

**Figure V-8.  
Median Income by  
Tenure, Southeast Region,  
Counties, 2010 and 2021**

Source:  
2010 and 2021 5-year ACS and Root Policy  
Research.

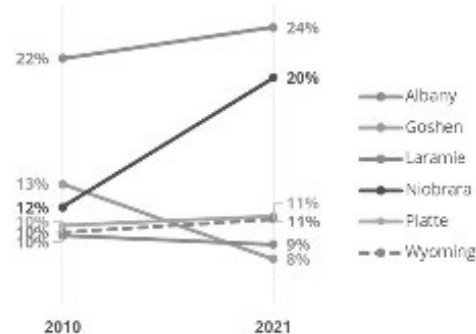
	Median Income		2010-2021 Change	
	2010	2021	Amount	Percent
<b>Albany</b>				
Owner	\$65,696	\$89,466	\$23,770	36%
Renter	\$23,579	\$30,500	\$6,921	29%
<b>Goshen</b>				
Owner	\$49,309	\$65,341	\$16,032	33%
Renter	\$29,211	\$38,971	\$9,760	33%
<b>Laramie</b>				
Owner	\$65,355	\$84,899	\$19,544	30%
Renter	\$32,095	\$42,763	\$10,668	33%
<b>Niobrara</b>				
Owner	\$59,688	\$51,417	-\$8,271	-14%
Renter	\$31,810	\$39,583	\$7,773	24%
<b>Platte</b>				
Owner	\$49,917	\$68,777	\$18,860	38%
Renter	\$25,152	\$26,880	\$1,728	7%
<b>Wyoming</b>				
Owner	\$64,489	\$81,875	\$17,386	27%
Renter	\$33,550	\$39,506	\$5,956	18%

Poverty rates for each county in Wyoming's Southeast Region are presented in Figure V-9. In 2021, Goshen and Laramie counties had poverty rates lower than that of Wyoming. Albany, Niobrara, and Platte counties had poverty rates higher than that of the state in 2021. Albany's poverty rate of 24% is the highest of any county in Wyoming, followed by Niobrara's poverty rate of 20%.

Between 2010 and 2021, poverty rates increased by around nine percentage points in Niobrara county, by two percentage points in Albany county, and by one percentage point in Platte county. Goshen and Laramie counties saw their poverty rates decrease by five and one percentage points, respectively.

**Figure V-9.  
Poverty Rate, Southeast  
Region, Counties, 2010 and  
2021**

Source:  
2010 and 2021 5-year ACS and Root Policy  
Research.



## Economic Trends

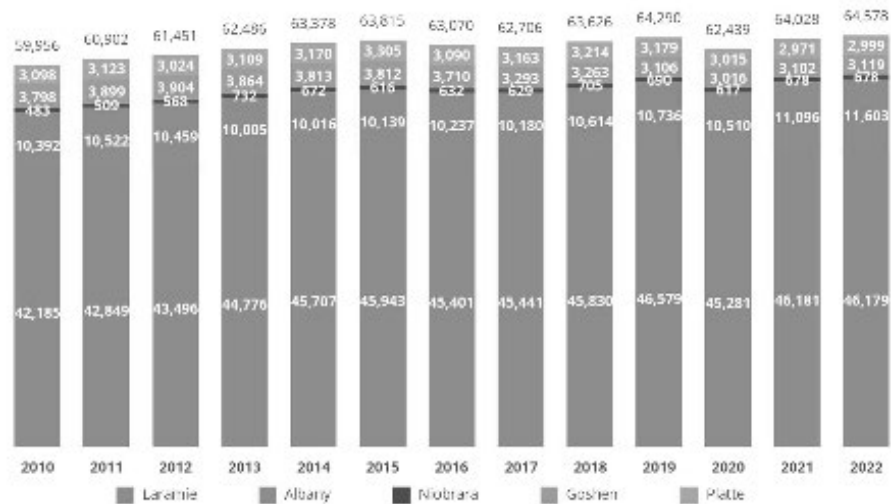
**Employment.** As shown in Figure V-10 below, total employment in the Southeast Region increased from 59,918 jobs in 2010 to 64,524 jobs in 2022, representing an increase of nearly 8%.

Total employment increased each year from 2011 until peaking at nearly 64,000 jobs in 2015. Total employment decreased with the energy sector contraction, then increased for two consecutive years, surpassing 64,000 in 2019. The pandemic prompted the Southeast Region's largest single-year drop in employment: a loss of over 1,800 jobs between 2019 and 2020. The Region's employment quickly recovered, adding nearly 1,600 jobs between 2020 and 2021. Positive employment growth continued in 2022, surpassing regional employment's pre-pandemic peak.

Laramie county's share of regional employment (72%) is outsized compared to its share of the regional population (62%). Platte county accounts for 5% of regional employment and 5% of the Region's population. Each other county's share of regional employment is smaller than its share of the regional population. Albany county is home to 23% of the Region's population, but only accounts for 18% of employment in the Region. Goshen county accounts for 8% of the regional population but only 5% of regional employment. Niobrara county accounts for 2% of the regional population and 1% of regional employment.

Goshen and Platte counties experienced net decreases in total employment between 2010 and 2022, while all other counties in the Region saw increases in total employment.

**Figure V-10.**  
**Total Employment by County, Southeast Region, Counties, 2010 to 2022**



Source: Quarterly Census of Employment and Wages and Root Policy Research.

The three largest industries in the Southeast Region by employment are Education & Health Services (23% of total jobs); Trade, Transportation, & Utilities (22% of total jobs); and Leisure & Hospitality (13% of total jobs).

Figures V-11 through V-15 provides a detailed overview of employment within each constituent county of Wyoming's Southeast Region. Figures are presented in the order of highest to lowest total employment.

As shown in Figure V-11, total employment in Laramie county grew by 9% (+3,994 jobs) between 2010 and 2022. In both 2010 and 2022, Laramie county's three leading industries by employment are Education & Health Services (10,893 jobs); Trade, Transportation, & Utilities (10,060 jobs); and Public Administration (6,478 jobs).

Employment within the Trade, Transportation, & Utilities industry experienced the largest growth by employment (+1,408 jobs), followed by Professional & Business Services (+1,021 jobs). Only three sectors (Manufacturing, Information, and Public Administration) experienced a net loss of jobs between 2010 and 2022. Of these, Public Administration had the most significant decrease in employment (-497 jobs).

Figure V-11.

**Employment by Industry, Laramie County, 2010 and 2022**

Laramie County	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
Goods Producing	4,375	4,996	621	14%
Natural Resources & Mining	335	738	403	120%
Construction	2,621	3,016	395	15%
Manufacturing	1,419	1,242	-177	-12%
Service Providing	37,810	41,183	3,373	9%
Trade, Transportation, & Utilities	8,652	10,060	1,408	16%
Information	1,086	799	-287	-26%
Financial Activities	2,149	2,316	167	8%
Professional & Business Services	3,277	4,289	1,012	31%
Education & Health Services	10,123	10,893	770	8%
Leisure & Hospitality	4,321	5,112	791	18%
Other Services	1,227	1,236	9	1%
Public Administration	6,975	6,478	-497	-7%
All Industries	42,185	46,179	3,994	9%

Source: Quarterly Census of Employment and Wages and Root Policy Research.

Figure V-12 below shows employment in Albany county, the second largest county in the Southeast Region in terms of population and employment. Total employment in the county grew by 1,211 jobs, or 12%, between 2010 and 2022.

Albany county's three largest sectors by employment are Education & Health Services (2,456 jobs), Leisure & Hospitality (2,326 jobs), and Trade, Transportation, & Utilities (2,302 jobs). Employment within the Education & Health Services industry experienced the largest total growth (+584 jobs), while Professional & Business Services and Leisure & Hospitality also added over 400 jobs each. Only two industries saw net job losses over the time studied: the Information industry lost 61 jobs, while Public Administration lost 634 jobs (62% of its 2010 employment).

**Figure V-12.**  
**Employment by Industry, Albany County, 2010 and 2022**

Albany County	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
Goods Producing	1,162	1,431	269	23%
Natural Resources & Mining	87	146	59	68%
Construction	751	770	19	3%
Manufacturing	324	515	191	59%
Service Providing	9,230	10,172	942	10%
Trade, Transportation, & Utilities	2,118	2,302	184	9%
Information	144	83	-61	-42%
Financial Activities	603	712	109	18%
Professional & Business Services	1,068	1,471	403	38%
Education & Health Services	1,932	2,456	524	27%
Leisure & Hospitality	1,919	2,326	407	21%
Other Services	418	428	10	2%
Public Administration	1,028	394	-634	-62%
All Industries	10,392	11,603	1,211	12%

Source: Quarterly Census of Employment and Wages and Root Policy Research.

Figure V-13 below shows employment detail for Goshen county. Across the time studied, total employment in the county decreased by 18%, or 679 jobs, likely prompting the county's negative net migration across the time studied. In 2022, the Education & Health Services industry had the largest employment in Goshen county (796 jobs), followed by Trade, Transportation, & Utilities (688 jobs) and Leisure & Hospitality (415 jobs). Education & Health Services and Trade, Transportation, & Utilities were also the two largest sectors by employment in 2010. Public Administration, the county's third largest industry by employment in 2010, experienced the greatest loss of employment between 2010 and 2022 (-404 jobs, or -61% of 2010 employment). While six industries lost over 30 jobs in the time studied, Leisure & Hospitality was the only industry to add over 30 jobs.

**Figure V-13.**  
**Employment by Industry, Goshen County, 2010 and 2022**

Goshen County	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
<b>Goods Producing</b>	<b>673</b>	<b>486</b>	<b>-187</b>	<b>-28%</b>
Natural Resources & Mining	142	148	6	4%
Construction	230	180	-50	-22%
Manufacturing	300	157	-143	-48%
<b>Service Providing</b>	<b>3,125</b>	<b>2,633</b>	<b>-492</b>	<b>-16%</b>
Trade, Transportation, & Utilities	735	688	-47	-6%
Information	48	N/A	N/A	N/A
Financial Activities	189	178	-11	-6%
Professional & Business Services	199	221	22	11%
Education & Health Services	837	796	-41	-5%
Leisure & Hospitality	343	415	72	21%
Other Services	112	77	-35	-31%
Public Administration	662	258	-404	-61%
<b>All Industries</b>	<b>3,798</b>	<b>3,119</b>	<b>-679</b>	<b>-18%</b>

Note: Data are unavailable for categories marked "N/A". In accordance with BLS policy, data are reported under a promise of confidentiality and are published in a way so as to protect the identifiable information of reporters. BLS withholds the publication employment and wage data for any industry level when necessary to protect the identity of employers.

Source: Quarterly Census of Employment and Wages and Root Policy Research.

As shown in Figure V-14 below, total employment in Platte county decreased by 99 jobs (-3% of 2010 employment) between 2010 and 2022.

In 2022 and in 2010, Platte county's three largest industries by employment are Trade, Transportation, & Utilities (894 jobs), Education & Health Services (680 jobs), and Leisure & Hospitality (427 jobs). Most industries experienced employment losses except for Natural Resources & Mining, manufacturing, and Professional & Business Services. Total job losses were largest in the Education & Health Services and Trade, Transportation, & Utilities industries, the county's two largest industries by employment.

**Figure V-14.**  
**Employment by Industry, Platte County, 2010 and 2022**

Platte County	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
Goods Producing	485	536	51	11%
Natural Resources & Mining	220	276	56	25%
Construction	203	192	-11	-5%
Manufacturing	62	69	7	11%
Service Providing	2,613	2,463	-150	-6%
Trade, Transportation, & Utilities	965	894	-71	-7%
Information	26	19	-7	-27%
Financial Activities	149	137	-12	-8%
Professional & Business Services	114	159	45	39%
Education & Health Services	753	680	-73	-10%
Leisure & Hospitality	433	427	-6	-1%
Other Services	65	60	-5	-8%
Public Administration	108	87	-21	-19%
All Industries	3,098	2,999	-99	-3%

Source: Quarterly Census of Employment and Wages and Root Policy Research.

As shown in Figure V-15 below, total employment in Niobrara county increased by 195 jobs, or 40%. In both 2010 and 2022, the two largest sectors of the economy are Education & Health Services (270 jobs) and Trade, Transportation, & Utilities (113 jobs). The largest total job growth took place in the Public Administration industry (+83 jobs), while the most significant job loss took place in the Trade, Transportation, & Utilities Industry (-27 jobs).

**Figure V-15.**  
**Employment by Industry, Niobrara County, 2010 and 2022**

Niobrara County	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
Goods Producing	N/A	N/A	N/A	N/A
Natural Resources & Mining	N/A	N/A	N/A	N/A
Construction	38	54	16	42%
Manufacturing	N/A	N/A	N/A	N/A
Service Providing	445	624	179	40%
Trade, Transportation, & Utilities	140	113	-27	-19%
Information	N/A	4	N/A	N/A
Financial Activities	29	29	0	0%
Professional & Business Services	N/A	21	N/A	N/A
Education & Health Services	250	270	20	8%
Leisure & Hospitality	N/A	86	N/A	N/A
Other Services	17	9	-8	-47%
Public Administration	9	92	83	922%
All Industries	483	678	195	40%

Note: Data are unavailable for categories marked "N/A". In accordance with BLS policy, data are reported under a promise of confidentiality and are published in a way so as to protect the identifiable information of reporters. BLS withholds the publication employment and wage data for any industry level when necessary to protect the identity of employers.

Source: Quarterly Census of Employment and Wages and Root Policy Research.

Collectively, the Southeast Region saw a nearly 3,900-job increase in service providing jobs and a 750-job increase in goods producing jobs. The Region's growth in employment since 2010 was skewed towards service providing industries.

**Wages.** Figure V-16 shows average annual wages by industry for each county in Wyoming's Southeast Region. Between 2010 and 2022, average annual wages grew for each industry where complete data are available in Albany, Laramie, Goshen, and Platte counties. In Niobrara county, average annual wages decreased for jobs in Public Administration and Other Services.

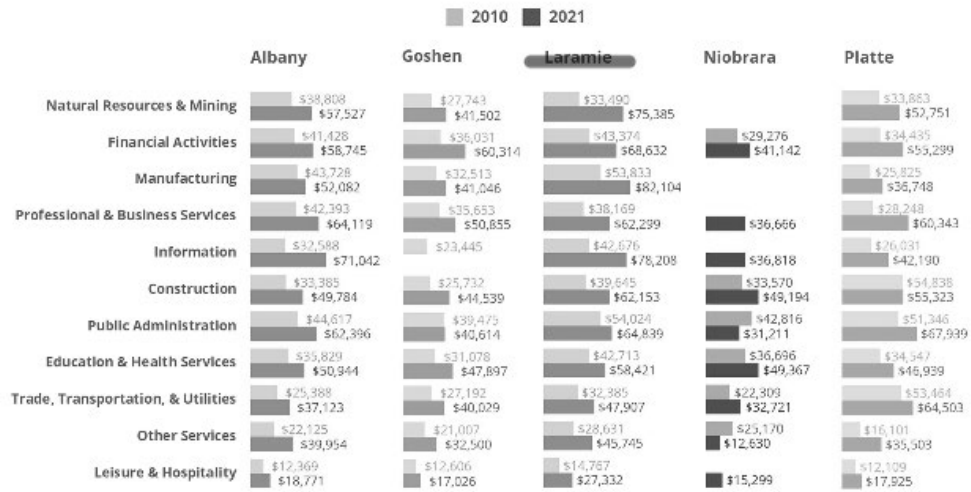
The Information industry has the highest average annual wages of any industry in Albany county and the second highest average annual wages of any industry in Laramie county. Laramie county's highest average annual wages are found in the Manufacturing industry. The Financial Activities industry has the highest average annual wages of any industry in Goshen county, while Platte county's highest average annual wages are found in the Public



Administration industry. In Niobrara county, average annual wages are highest in the Education & Health Services and Construction industries.

Figure V-16.

Average Annual Wages by Industry, Southeast Region, Counties, 2010 and 2021



Note: Data are unavailable for categories without bars shown.

Source: Quarterly Census of Employment and Wages and Root Policy Research.

## Housing Market Trends

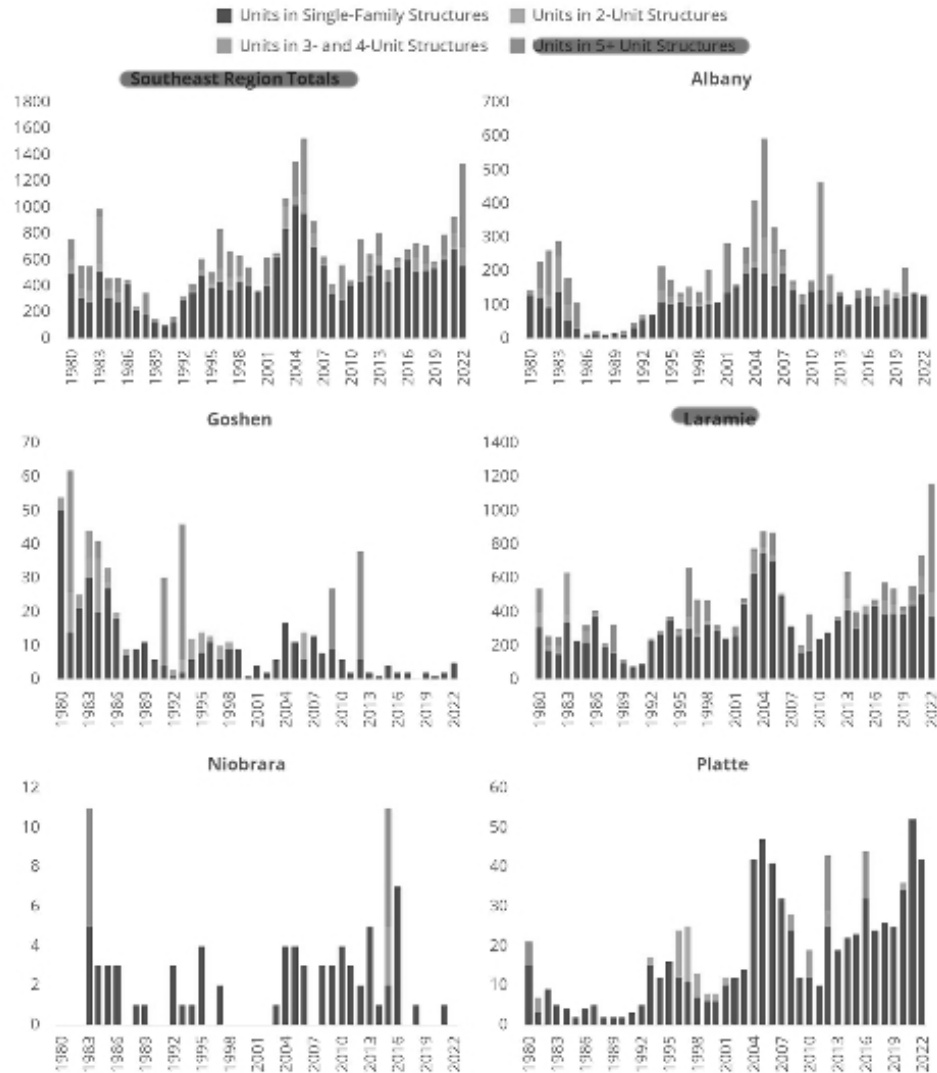
**Residential building permits.** Residential building permits in Wyoming's Southeast Region have been largely dominated by units in single-family structures. Around 71% of units permitted in the Southeast Region since 1980 are units in single-family structures and around 20% are units in multifamily structures of 5 units or more. Units in 2-unit structures account for 1% of units permitted, and units in 3- and 4-unit structures account for 8% of units permitted.

Figure V-17 below shows trends in residential building permits for the Southeast Region and each of its constituent counties. Note that scale differs in each geography's section of the figure based on total permits issued. As expected, Laramie and Albany counties account for the largest volumes of permits issued.

The Southeast Region and its counties saw relatively high volumes of building permits issued in the early 1980s, peaking at 836 units permitted in 1986 before dropping in the aftermath of the 1980s recession. Only 111 building permits were issued in 1990. Building permitting gradually recovered, peaking below the pre-recession peak in 1996 before gradually declining until 2000. Permitting climbed until the mid-2000s, declining sharply with the 2008 recession, and climbing overall since 2008 to reach 1,338 permits issued in 2022.

The highest volume of multifamily development (as indicated by building permits issued) over this period took place in Laramie county and Albany county, the most populous and urban counties in the Region.

**Figure V-17.**  
**Building Permits by Units in Structure, Southeast Region, Counties, 1980-**  
**2022**



Source: U.S. Census Building Permits Survey and Root Policy Research.

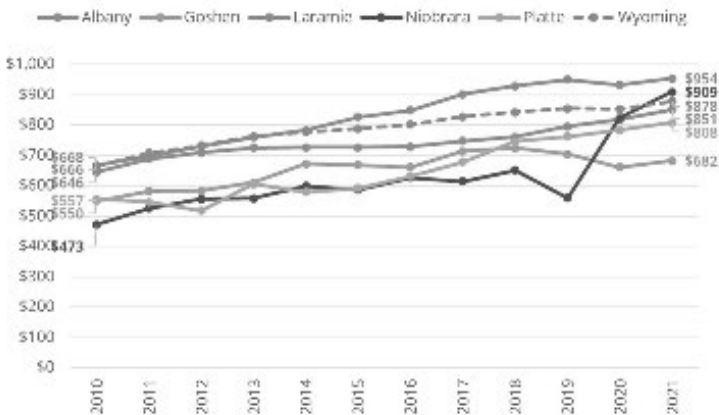
**Median rent.** Figure V-18 shows trends in median gross rent for the state of Wyoming and the counties of the Southeast Region. Wyoming and each Southeast Region county experienced a growth in median gross rents between 2010 and 2021.

Over the time studied, Niobrara county saw the largest rise in median gross rent (+\$436, nearly doubling its 2010 value). As of 2021, Laramie county has the highest median gross rent at \$954, followed by Niobrara county (\$909) and Albany county (\$851). In 2010, Niobrara county, the most sparsely populated county in the Region, had the lowest median gross rent in the region. The Region's lowest median gross rent in 2021 is found in Goshen county (\$682).

Albany, Goshen, and Platte counties had median gross rents below the state's median gross rent for each year studied. Niobrara county's median gross rent was below that of Wyoming for each year until surpassing it in 2021. Laramie county's median gross rent was higher than the state's median gross rent for most years studied.

**Figure V-18.**  
**Median Gross**  
**Rent,**  
**Wyoming and**  
**Southeast**  
**Region,**  
**Counties, 2010-**  
**2021**

Source:  
2010-2021 5-year ACS and  
Root Policy Research.



The median rent data shown above reflects rents for all rental units until 2021 according to ACS estimates. Additional detail for 2023 year-to-date median rents in units in structures containing five or more housing units is available in the table below. As data are not available for all multifamily units in each county, the final column in the table specifies the number of units reflected in the median rent estimate.

**Figure V-19.**  
**Multifamily Median Rent, Southeast**  
**Region, Counties, 2023 YTD**

Note:  
 Multifamily units are defined as units in buildings of 5+ units. No  
 rent data are available for multifamily units in Niobrara county.

Source:  
 CoStar and Root Policy Research.

	Median Rent	Units Included
Albany	\$876	700
Goshen	\$681	80
Laramie	\$1,102	2,599
Niobrara	N/A	0
Platte	\$1,357	100

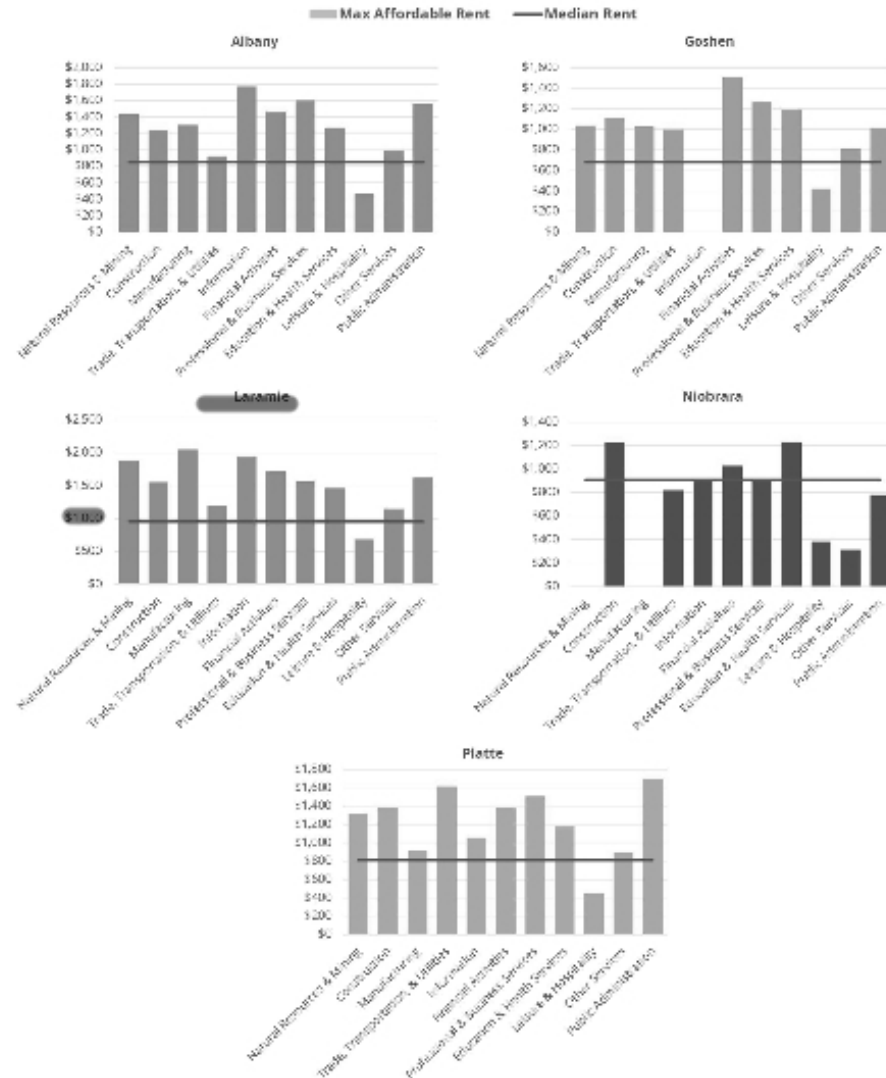
**Housing affordability by industry.** The federal government considers housing to be affordable when housing cost—the rent or mortgage payment plus taxes, utilities, mortgage, insurance, and HOA fees—consumes 30% or less of a household's gross income. Households spending more than 30% of their gross income are cost burdened.

Figures V-20 and V-21 below show housing affordability for the Southeast Region's workforce by comparing median rent and median home sales prices with rental and ownership affordability thresholds for individuals earning the average annual wages of industries in each county.

As shown in Figure V-20, median rent is affordable to individuals earning average wages for most industries for which data are available. By contrast, median rent is unaffordable to average wage earners in the Leisure & Hospitality industry in all Southeast Region counties (which accounts for 13% of the Region's total employment) and Trade, Transportation, & Utilities and Other Services industries in Niobrara county.

Figure V-20.

Rental Affordability by Industry, Southeast Region, Counties, 2021/22



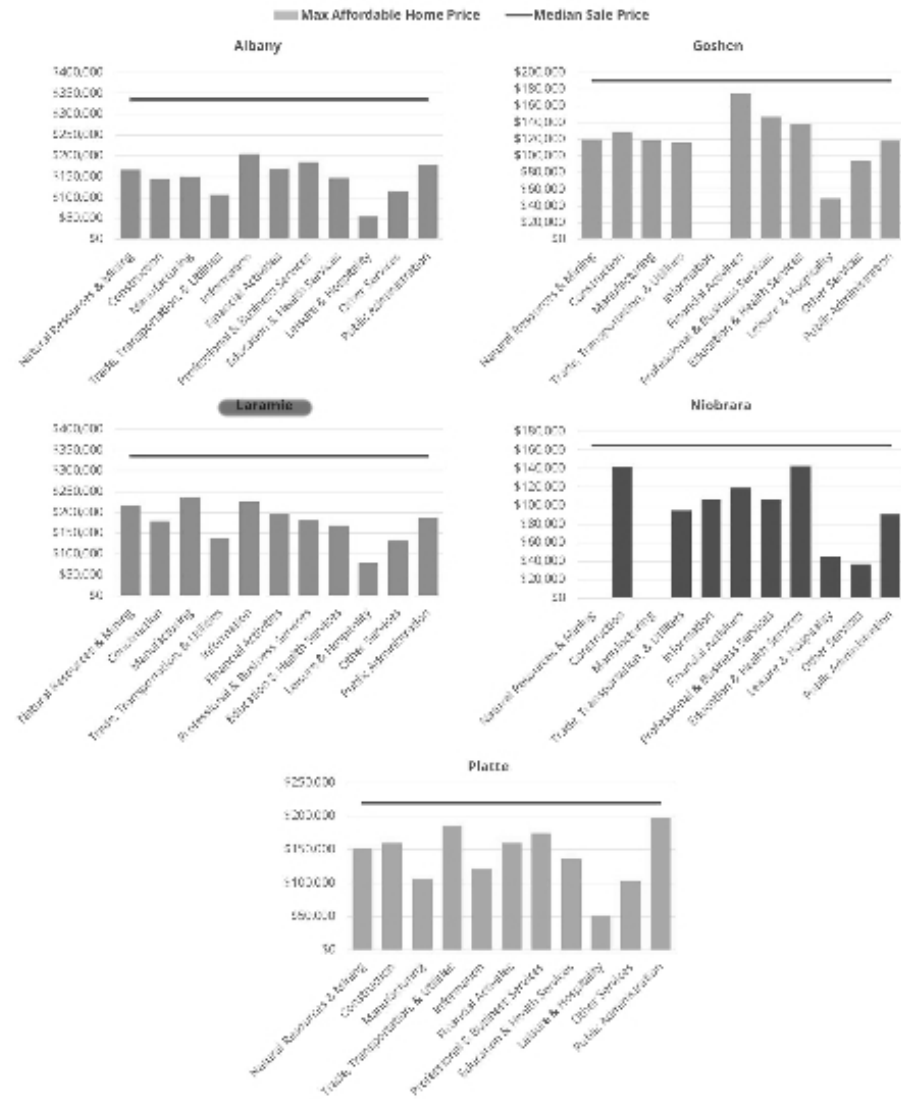
Note: Affordability estimates assume families spend no more than 30% of their income on housing. Max affordable rent estimates are based on 2022 average wage data, while median rent estimates are 2021 data. Data are unavailable for categories without bars shown.

Source: Quarterly Census of Employment and Wages, 2021 5-year ACS, and Root Policy Research.

Figure V-21 below shows home purchase affordability by industry. While average wage earners in most industries can afford to pay median rents in the Southeast Region, average wage earners in all industries for which data are available cannot afford to purchase a median-priced home in their county. Assuming that all Southeast Region residents earn the average wages for their industries in their counties, this means that 0% of Southeast Region residents can afford to purchase a median-priced home.



**Figure V-21.**  
**Purchase Affordability by Industry, Southeast Region, Counties, 2022**



Note: Affordability estimates assume a household spends 30% of its income on housing and assume a 30-year mortgage with a 7% interest rate, a 10% down payment, and 30% of monthly payment to property taxes, utilities, and insurance. Data are unavailable for categories without bars shown.

Source: Quarterly Census of Employment and Wages, Assessor data by the Wyoming Department of Revenue, and Root Policy Research.

**Rental vacancy.** Figure V-22 below shows rental vacancy rates for counties in Wyoming's Southeast Region in 2023.<sup>3</sup> As data are not available for all multifamily units in each county, the final column in the table specifies the number of units reflected in the vacancy rate estimate. According to 2023 estimates, Albany county has a tight multifamily rental market with a vacancy rate below 5%, considered healthy for the rental market. Goshen, Laramie, and Platte counties have rental vacancy rates of around 5%, while Niobrara has a higher rental vacancy rate of 8.5%.

**Figure V-22.**  
**Multifamily Rental Vacancy Rate,**  
**Southeast Region, Counties, 2023**  
**YTD**

Note:  
Rate for Platte comes from the Wyoming Rental Vacancy Survey. CoStar Multifamily units are defined as units in buildings of 5+ units.

Source:  
CoStar, C&P Advisors Wyoming Rental Vacancy Survey, and  
Root Policy Research.

	Multifamily Vacancy Rate	Units Included
Albany	3.0%	1,307
Goshen	5.4%	293
Laramie	4.9%	5,827
Niobrara	8.5%	40
Platte	5.7%	212

**Mortgage loan activity.** Home Mortgage Disclosure Act (HMDA) data indicate loan originations and can be analyzed to understand shifts in home purchase activity by location, home value, occupancy type, and other factors. HMDA data only include home purchases that made use of a mortgage; home purchases made in cash, without a mortgage, are not included in the data. Therefore, the following estimates undercount the total volume of home purchases.

Figure V-23 shows the volume of home loan originations by county in the Southeast Region from 2018 to 2022. The Southeast Region saw a relatively low volume of home purchase loan originations in 2018 and 2019. Mortgage originations rose with low interest rates during the COVID-19 pandemic in 2020 and 2021. Mortgage originations fell below pandemic-era levels alongside steep increases in interest rates in 2022.

As of 2022, Laramie and Albany counties, the two largest counties in the Region by population, account for the largest shares of the Region's home purchase loan originations at 72% for Laramie county and 19% for Albany county. Together, these counties account

<sup>3</sup> Vacancy data come from two sources: 1. Commercial real estate market analytics firm CoStar provides rental vacancy rates. CoStar collects data on vacancy rates for multifamily rental developments containing five or more units at the development level and aggregates these data to provide estimates at different geographic levels. 2. The Wyoming Rental Vacancy Survey (WRVS) which was undertaken on behalf of the Wyoming Community Development Authority, beginning in July 2023. The survey was designed to collect information regarding rentals throughout the State of Wyoming. Data were collected through systematic online data collection and telephone survey. In places where the coverage of this survey was higher than CoStar coverage, data from this survey were used instead.

for over 90% of 2022 home purchase loan originations in the Southeast Region. With a population accounting for 62% of the regional population, Laramie county's share of home loan originations is outsized relative to its population.

**Figure V-23.**  
**Home Loan**  
**Originations,**  
**Southeast**  
**Region, Counties,**  
**2018-2022**

Note:  
Includes first lien loan  
originations only.

Source:  
HMDA and Root Policy  
Research.

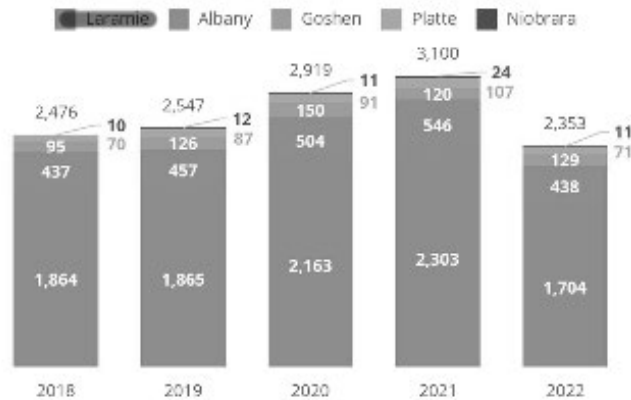


Figure V-24 shows trends in the median home value for originated home purchase loans for each county in the Southeast Region and for Wyoming. The median home value for originated home purchase loans has increased overall since 2018 in each county of the Region for which data are available. As of 2022, the median home value for originated home purchase loans is greater in Laramie and Albany counties than it is in Wyoming. Of all counties in the Southeast Region, these three counties also experienced the largest growths in median home value for originated loans at +\$120,000 since 2018. Home values are lowest in Goshen county, followed by Platte county. Based on the available data for Niobrara county, Niobrara county had the lowest median home value for originated loans of any county in 2021.

**Figure V-24.  
Median Home  
Value for  
Originated  
Home Purchase  
Loans,  
Southeast  
Region,  
Counties, 2018-  
2022**

Note:  
Includes first lien loan  
originations only. Niobrara  
county data are only available  
for 2018.

Source:  
HMDA and Root Policy  
Research.

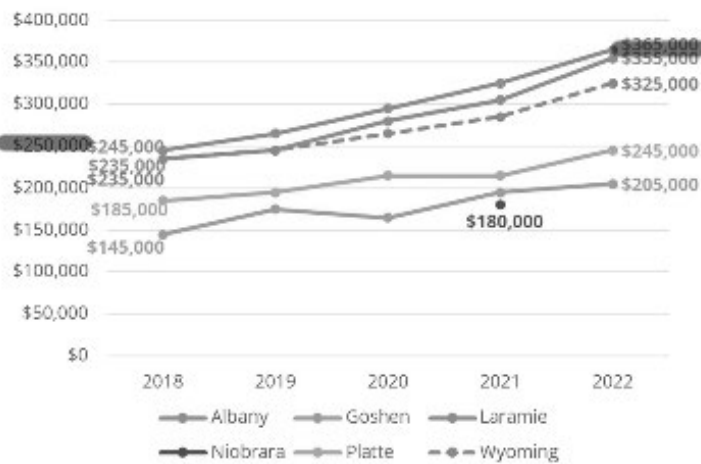


Figure V-25 shows trends in property values for originated home purchase loans by occupancy type between 2018 and 2022. In 2022, in the Southeast Region overall, home purchase loan originations for investment properties had the lowest median home value (\$275,000). Median home values were equal for principal residences and second residences at \$355,000.

As in the Region, home values for originated home purchase loans in Albany county were the highest in principal and second residences at \$365,000 in 2022. This value is slightly higher than the value for equivalent residences in the Region. Investment properties in Albany county had the lowest median value at \$275,000. Investment properties also hold the lowest median value of any occupancy type in Laramie county at \$295,000 in 2022. Median home values for originated loans were slightly higher for second residences in Laramie county (\$375,000) than for principal residences (\$365,000).

Median values for principal residences in Albany and Laramie counties, the most populous counties in the Region, were higher than those in the Southeast Region in 2022, while median values for principal residences in Goshen and Platte counties were lower than those for the Region. Second residences in Albany and Laramie counties and investment properties in Laramie county had higher median values than those for the Region. Investment properties in Albany county had an equal median value to that for the Region in 2022. Data are not available for second residences and investment properties in Goshen and Platte counties or for any occupancy types in Niobrara county due to too few loan originations for these occupancy categories.

Median home values for each occupancy type appreciated by around 40-50% between 2018 and 2022 in the Southeast Region. Values of second residences appreciated at a higher rate (51%) than values of principal residences (45%) and investment properties (41%) over the time studied. Values of principal residences appreciated slightly more in Albany and Laramie counties than in the Southeast Region as a whole, while appreciation of median value for principal residences in Goshen county matched that of the Region. Principal residences in Platte county appreciated at a slightly lower rate than those in the Region. The rates of appreciation for second residences in Albany and Laramie counties and for investment properties in Laramie county were higher than that in the Region. Investment properties in Albany county appreciated at a lower rate than those in the Region.

**Figure V-25.**  
**Median Home Value for Originated Home Purchase Loans by Occupancy**  
**Type, Southeast Region, Counties, 2018-2022**

	Median Property Value		2018-2022 Change	
	2018	2022	Amount	Percent
<b>Albany</b>				
Principal residence	\$245,000	\$365,000	\$120,000	49%
Second residence	\$215,000	\$365,000	\$150,000	70%
Investment property	\$215,000	\$275,000	\$60,000	28%
<b>Goshen</b>				
Principal residence	\$155,000	\$225,000	\$70,000	45%
Second residence	N/A	N/A	N/A	N/A
Investment property	N/A	N/A	N/A	N/A
<b>Laramie</b>				
Principal residence	\$245,000	\$365,000	\$120,000	49%
Second residence	\$245,000	\$375,000	\$130,000	53%
Investment property	\$185,000	\$295,000	\$110,000	59%
<b>Niobrara</b>				
Principal residence	N/A	N/A	N/A	N/A
Second residence	N/A	N/A	N/A	N/A
Investment property	N/A	N/A	N/A	N/A
<b>Platte</b>				
Principal residence	\$185,000	\$255,000	\$70,000	38%
Second residence	N/A	N/A	N/A	N/A
Investment property	N/A	N/A	N/A	N/A
<b>Southeast Region</b>				
Principal residence	\$245,000	\$355,000	\$110,000	45%
Second residence	\$235,000	\$355,000	\$120,000	51%
Investment property	\$195,000	\$275,000	\$80,000	41%

Note: Includes first lien loan originations only. Data are omitted for categories with fewer than 20 sales.

Source: HMDA and Root Policy Research.

Trends in home value by occupancy type for the Southeast Region are further illustrated in Figure V-26. Between 2018 and 2022, second residences saw the largest rise in median value (+\$120,000), followed by principal residences (+\$120,000). Across the time studied, median property values were lowest for investment properties. Median property values were highest for principal residences in most years studied. Because 90% of home loan originations in the Southeast Region are for principal residences, median values for home loan originations overall closely track those for principal residences.

**Figure V-26.**  
**Median Home Value by Occupancy Type, Southeast Region, 2018-2022**

Note:  
Includes first lien loan originations only.

Source:  
HMDA and Root Policy Research.

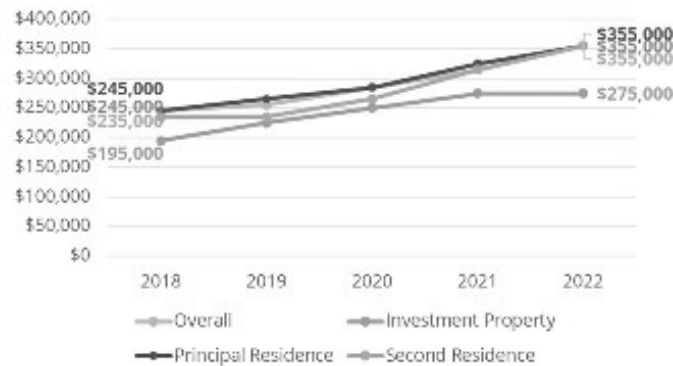
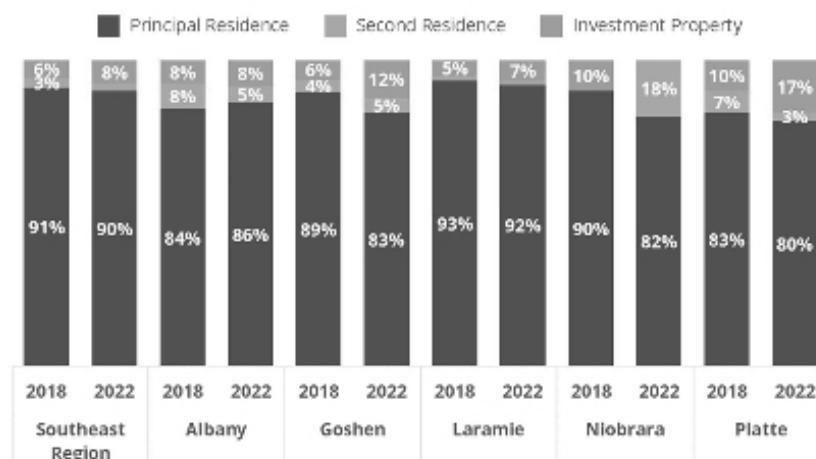


Figure V-27 shows the composition of total loan originations by occupancy type for the Southeast Region and each of its counties between 2018 and 2022. Across the time studied, principal residences accounted for at least 90% of loan originations in the Southeast Region and for at least 82% of loan originations for each county in the Region. Investment properties accounted for the second greatest share of the Region's loan originations at 8% in 2022, while second residences only accounted for around 2-3% of loan originations.

Between 2018 and 2022, the Southeast Region saw a slight decrease in the share of loan originations for principal and second residences, accompanied by a commensurate increase in the share of loan originations for investment properties. As of 2022, second residences accounted for the second largest share of loan originations in Niobrara county, while investment properties accounted for the second largest share of loan originations in all other counties.

**Figure V-27.**  
**Distribution of Home Purchase Loan Originations by Occupancy Type and County, 2018 and 2022**



Note: Includes first lien originations only. 1% and 2% values are not labeled.

Source: HMDA and Root Policy Research.

**Home sales.** Assessor data from Wyoming's Department of Revenue details home sales for single-family homes on ten acres or less for each county in Wyoming.

Figure V-28 shows the median sales price for housing units sold in Wyoming's Southeast Region in 2022. The median price for all housing units in the Region was \$320,625. Goshen, Niobrara, and Platte counties had median sales prices below the regional median. Niobrara county had the lowest median sales price in the Region at \$165,000. Albany and Laramie counties had median sales prices higher than that of the Region at \$335,000.

In the Southeast Region, single family homes had the highest median price of any home type at \$335,000. Modular and mobile homes had the second highest median price at \$294,000, while townhomes and condos had the third highest median price at \$280,000. Duplexes had the lowest median price at \$270,000. Single family homes likewise had the highest median price of any home type for which data are available in Albany and Laramie counties. As in the Region, median sales prices in Laramie county are lower for townhomes and condos than they are for modular and mobile homes. In Albany county, median sales prices are higher for townhomes and condos than they are for modular and mobile homes.



**Figure V-28.**  
**Median Home Sales Price by Structure Type, Southeast Region, Counties,**  
**2022**

	Median Sales Price				
	All Units	Single Family	Duplex	Townhome/ Condo	Modular/ Mobile Home
<b>Southeast</b>	\$320,625	\$335,000	\$270,000	\$280,000	\$294,000
<b>Albany</b>	\$335,000	\$360,000	N/A	\$275,000	\$273,500
<b>Goshen</b>	\$190,000	\$191,000	N/A	N/A	N/A
<b>Laramie</b>	\$335,000	\$350,000	N/A	\$300,000	\$302,500
<b>Niobrara</b>	\$165,000	\$165,000	N/A	N/A	N/A
<b>Platte</b>	\$220,000	\$220,000	N/A	N/A	N/A

Note: Data are omitted for categories with fewer than 20 sales.

Source: Assessor data by the Wyoming Department of Revenue.

Figure V-29 below shows the distribution of renters and home sales by Area Median Income (AMI). The renter distribution presents the distribution of renter incomes by AMI range, while the home sales distribution presents the distribution of homes sold affordable to households with such income levels without being cost burdened. Although around 46% of the Southeast Region's renters have incomes below 50% AMI, 2% of the homes sold in 2022 were affordable to individuals in this price range. Over 75% of the Southeast Region's renters have incomes below 100% AMI though only 15% of homes sold in 2022 were affordable to individuals earning less than 100% AMI.

**Figure V-29.**  
**Renter and Affordable Home Sales Distribution by AMI, Southeast Region**

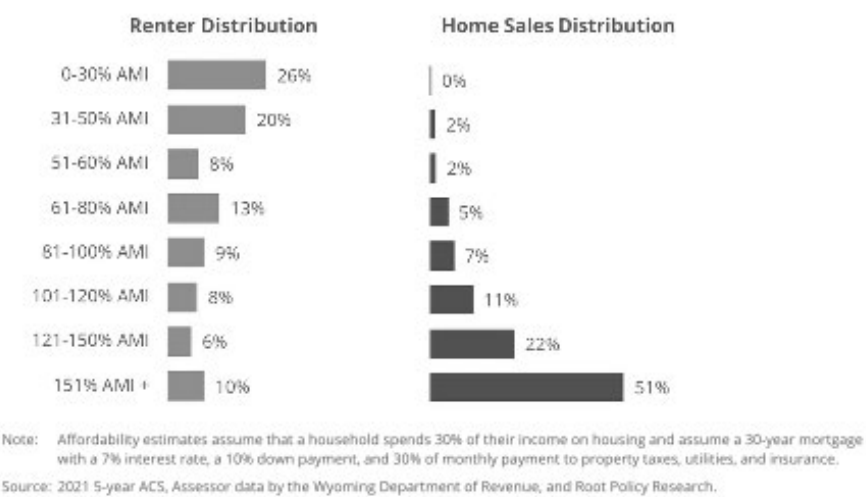
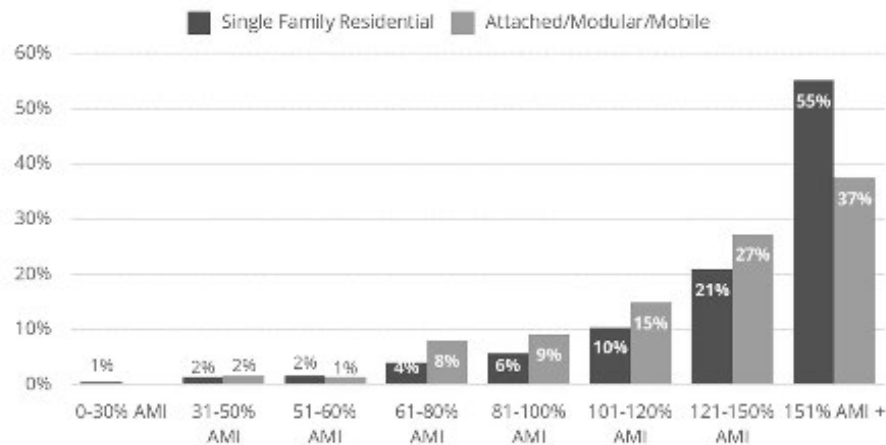


Figure V-30 displays the shares of total single family homes and attached, modular, and mobile homes sold in 2022 that were affordable to buyers in each AMI range. While both single family homes and attached, modular, and mobile homes are concentrated in the higher affordability ranges, a greater share of attached, modular, and mobile homes are affordable to moderate income households. **It is important to note that the region's housing stock is dominated by single family homes, so low to moderate income buyers interested in purchasing attached, modular, or mobile homes in their price ranges face significant supply constraints.**

**Figure V-30.**

**Home Sales Distribution by AMI and Unit Type, Southeast Region, 2022**



Note: Affordability estimates assume that a household spends 30% of their income on housing and assume a 30-year mortgage with a 7% interest rate, a 10% down payment, and 30% of monthly payment to property taxes, utilities, and insurance.

Source: Assessor data by the Wyoming Department of Revenue and Root Policy Research.

## Housing Problems

**Cost burden.** The federal government, and most housing programs, consider housing as affordable when the housing payment—the rent or mortgage payment, plus taxes and utilities—consumes 30% or less of a household's gross income. Households who pay more than 30% are "cost burdened." This standard is derived from historically typical mortgage lending requirements and is also applied to renters.

Households experiencing cost burden have less money to spend on other essentials like healthcare, education, groceries, and transportation—adversely affecting their household well-being, limiting their economic growth potential, and constraining local spending.

Figure V-31 shows the shares of renters and owners in Wyoming, the Southeast Region, and each Southeast Region county who experienced cost burden in 2010 and 2021. For each year studied in each area studied, renters face cost burden at higher rates than homeowners do.

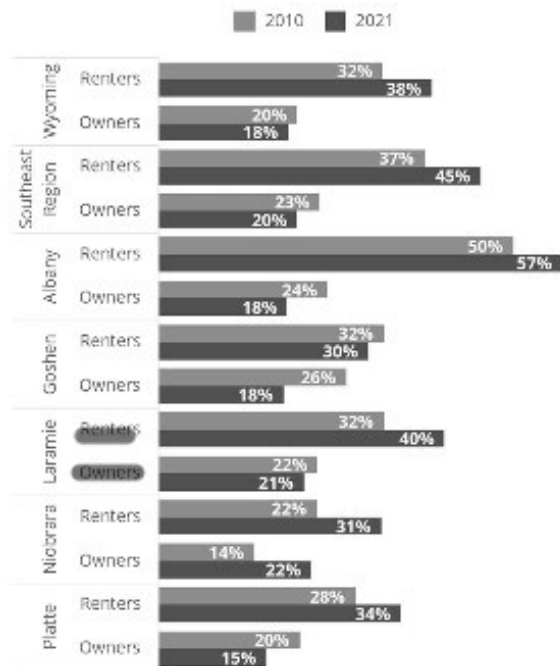
Between 2010 and 2021, the share of Wyoming renters experiencing cost burden rose by six percentage points from 32% to 38%, while the share of Wyoming homeowners experiencing cost burden decreased by two percentage points from 20% to 18%. The share of Southeast Region renters experiencing cost burden increased by eight percentage points from 37% to 45%, while the share of the Region's homeowners experiencing cost burden

decreased by three percentage points to 20%. Renters and homeowners in the Southeast Region experience cost burden at a higher rate than renters and homeowners in Wyoming, and renters in the Southeast Region face cost burden at a higher rate than renters in any other Region of the state.

As of 2021, renters in Albany county face cost burden at the highest rate in the Region and in Wyoming at 57%, while renters in Goshen county have the lowest rate for renters in the Region at 30%. Homeowners in Niobrara County face the highest rate of cost burden for owners in the Region at 22%, while homeowners in Albany and Goshen counties have the lowest rates of cost burden for owners in the Region at 18%.

**Figure V-31.**  
**Cost Burden by Tenure,**  
**Wyoming, Southeast**  
**Region, Counties, 2010**  
**and 2021**

Source:  
2010 and 2021 5-year ACS estimates and  
Root Policy Research.



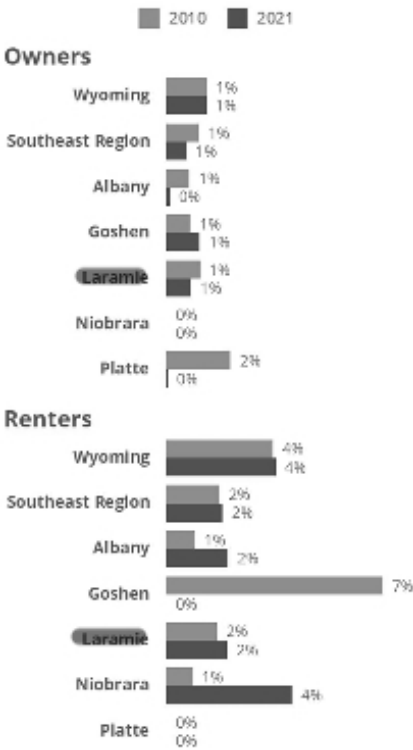
**Overcrowding.** Housing units are considered overcrowded when they are occupied by more than 1 person per room. Figure V-32 illustrates the rate of overcrowding by tenure for Wyoming, the Southeast Region, and the counties of the Southeast Region.

Overcrowding has been relatively stable overall for owner and renter households in Wyoming and in the Southeast Region between 2010 and 2021. Over the time studied, overcrowding increased for owners in Goshen county and for renters in Albany, Laramie, and Niobrara counties.

Renter households experience overcrowding at four times the rate of owner households in Wyoming and at greater rates than owner households in the Southeast Region and each of its counties except for Goshen and Platte counties, where owner and renter households experience overcrowding at similar rates.

**Figure V-32.**  
**Overcrowding by Tenure,**  
**Wyoming, Southeast Region,**  
**Counties, 2010 and 2021**

Source:  
ACS 2021 5-year estimates and Root Policy Research.



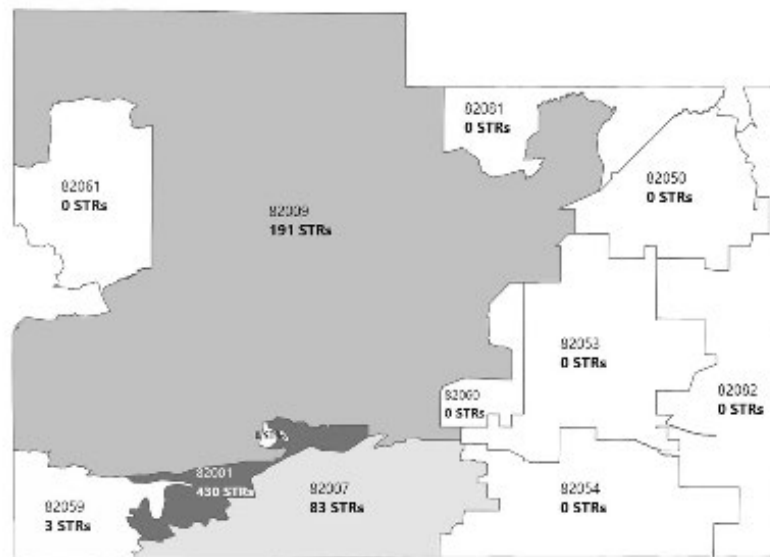
### Short Term Rental Market

Short-terms rentals, or STRs, play a unique role within housing markets, especially those with a large tourism industry, as they can provide economic benefit (to homeowners through rental revenue and the City through sales tax/tourism revenue) but may disrupt the long-term rental market if they account for a substantial portion of the total housing stock.

**Laramie County and Cheyenne.** According to data from AirDNA (a market analytics website for short term rentals), there are 704 homes listed as short-term rentals

(STRs) in Cheyenne<sup>4</sup> and 707 STRs in Laramie county<sup>5</sup>. Cheyenne's STR units, which may be active or inactive at the time of reporting, account for less than 2% of its total housing stock<sup>6</sup>. Figure V-33 below maps the volume of STRs in Laramie county's ZIP Codes. Almost all STRs in Laramie county are located within Cheyenne's ZIP Codes: 82001, 82007, and 82009.

**Figure V-33.**  
**Short Term Rental Units by ZIP Code, Laramie County and Cheyenne, 2023**



Note: Laramie county as presented in this section consists of the following ZIP Codes: 82001, 82009, 82007, 82054, 82082, 82005, 82053, 82061, 82050, 82081, 82059, 82008, 82003, 82002, 82006, 82010, and 82060. The city of Cheyenne is represented by its three main ZIP Codes: 82001, 82009, and 82007. This map uses ZIP Code Tabulation Areas (ZCTAs) from the U.S. Census Bureau to approximate ZIP Code boundaries. ZCTAs do not exist for uninhabited areas or areas with very few addresses. ZIP Codes without corresponding ZCTAs have not been mapped.

Source: AirDNA.com

<sup>4</sup> AirDNA.com provides market analytics for STRs by ZIP Code. ZIP Code boundaries do not perfectly align with city or county boundaries. In this section, Cheyenne is represented by its three main ZIP Codes: 82001, 82009, and 82007.

<sup>5</sup> Because some ZIP Codes cross county lines, it is not possible to provide an exact picture of the STR market in Laramie county. Laramie county as presented in this section consists of the following ZIP Codes: 82001, 82009, 82007, 82054, 82082, 82005, 82053, 82061, 82050, 82081, 82059, 82008, 82003, 82002, 82006, 82010, and 82060.

<sup>6</sup> According to 2022 5-year ACS estimates, there are 42,187 housing units in the 82001, 82007, and 82009 ZIP Code Tabulation Areas.

Figure V-34 below demonstrates the overall increase in the number of active STRs in Laramie county in November, 2020-2023. Note that STR activity is seasonal, with higher activity typically observed in the summer months.

**Figure V-34.**  
**Active Short Term**  
**Rental Units,**  
**Laramie County,**  
**2020-2023**

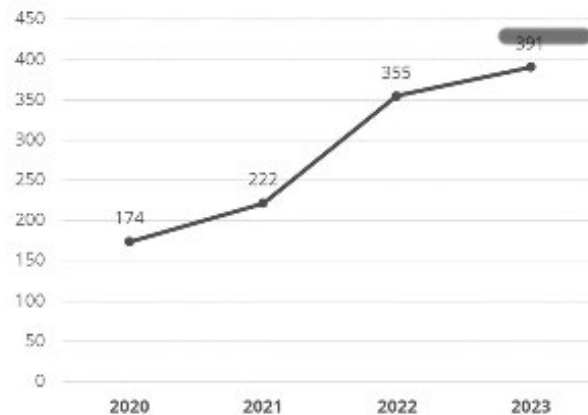
Note:

Counts reflect units available in November of each year.

Laramie county as presented in this section consists of the following ZIP Codes: 82001, 82009, 82007, 82054, 82082, 82005, 82053, 82061, 82050, 82081, 82059, 82008, 82003, 82002, 82006, 82010, and 82060.

Source:

AirDNA.com



As shown in Figure V-35, 77% of short term rentals in Laramie county are available for fewer than 180 nights per year. These are considered part-time STRs, some of which may be permanently occupied and rented occasionally, and others of which may be rented consistently and otherwise vacant or used seasonally. Coupled with the fact that STR units account for less than 2% of Cheyenne's total housing stock, this suggests that STR units are unlikely to meaningfully affect housing supply in Laramie county.

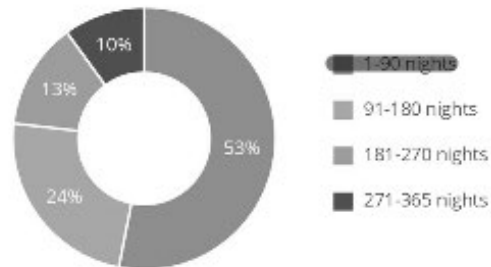
**Figure V-35.**  
**Short Term Rental**  
**Units by Annual**  
**Availability, Laramie**  
**County, 2023**

Note:

Laramie county as presented in this section consists of the following ZIP Codes: 82001, 82009, 82007, 82054, 82082, 82005, 82053, 82061, 82050, 82081, 82059, 82008, 82003, 82002, 82006, 82010, and 82060.

Source:

AirDNA.com



According to AirDNA, 82% of STRs in Laramie county are entire homes, 15% are private rooms, and 3% are shared rooms. Figure V-36 below shows the distribution of STRs by number of bedrooms. 44% of STRs in the county have 1 bedroom, 25% have 2 bedrooms, 18% have 3 bedrooms, 8% have 4 bedrooms, and 5% have 5 or more bedrooms.

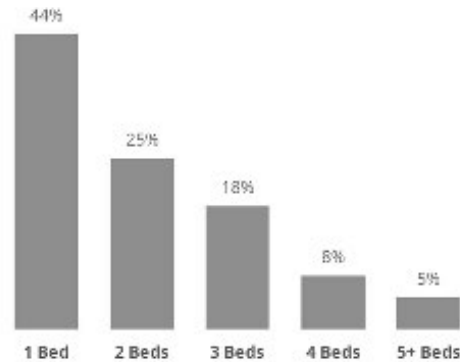
**Figure V-36.**  
**Short Term Rental Units**  
**by Number of Bedrooms,**  
**Laramie County, 2023**

Note:

Laramie county as presented in this section consists of the following ZIP Codes: 82001, 82009, 82007, 82054, 82082, 82005, 82053, 82061, 82050, 82081, 82059, 82008, 82003, 82002, 82006, 82010, and 82060.

Source:

AirDNA.com



## Housing Needs Projections

This section estimates the number of housing units needed to accommodate household growth through 2030, using population projections prepared by the Wyoming Economic Analysis Division.

Figure V-37 shows two estimates of the number of housing units each county in the Southeast Region needs to add to accommodate household growth and replace the loss in the housing stock. The first estimate assumes a housing loss of 0.24% every two years, and the second estimate assumes a housing loss of 1.7% every two years.<sup>7</sup> Estimates are shown as totals and by AMI, based on the state's AMI distribution provided by recent data from HUD's Comprehensive Housing Affordability Strategy (CHAS).

The estimates indicate that by 2030, between 4,386 and 7,266 total housing units will be needed to accommodate Laramie county households, between 2,504 and 3,721 units will be needed to accommodate Albany county households, and between 409 and 795 units will be needed to accommodate Goshen county households. Platte county must add between 304 and 607 housing units by 2030 to accommodate its 2030 population. Niobrara county's population decrease outpaces the loss of housing units assumed in Estimate 1, so under Estimate 1's assumptions, Niobrara county would not need to build additional housing units to accommodate its 2030 population. However, under Estimate 2's assumption of a higher rate of housing loss, Niobrara county would need to add 8 housing units to accommodate its 2030 population.

<sup>7</sup> According to the last Components of Inventory Change Report produced by HUD in 2017, which used American Housing Survey data, it was estimated that between 2015 and 2017, about 0.24% of the national housing stock was lost through demolitions or disasters alone. According to a Brookings Institute report, the two-year housing loss over the period 1985-2013 was 1.7% in the West region of the country (<https://www.brookings.edu/articles/unpacking-the-housing-shortage-puzzle/#:~:text=Churn%20is%20the%20sum%20of,built%20homes%20and%20no%20demolitions>).



**Figure V-37.**  
**Projected Housing Units Needed Between 2021 and 2030 by Tenure and**  
**AMI, Southeast Region, Counties**

	Renters		Homeowners		Total	
	Estimate 1	Estimate 2	Estimate 1	Estimate 2	Estimate 1	Estimate 2
<b>Albany</b>	<b>1,203</b>	<b>1,787</b>	<b>1,302</b>	<b>1,935</b>	<b>2,504</b>	<b>3,721</b>
0%-30% AMI	409	608	79	118	488	725
31%-50% AMI	227	338	81	121	309	459
51%-80% AMI	300	445	175	259	474	705
81%-100% AMI	91	135	173	257	264	392
100% + AMI	176	262	794	1,180	970	1,441
<b>Goshen</b>	<b>113</b>	<b>219</b>	<b>296</b>	<b>575</b>	<b>409</b>	<b>795</b>
0%-30% AMI	28	55	29	57	57	112
31%-50% AMI	24	47	32	61	56	109
51%-80% AMI	25	49	60	116	85	165
81%-100% AMI	11	20	34	67	45	87
100% + AMI	25	48	141	274	166	322
<b>Laramie</b>	<b>1,204</b>	<b>1,994</b>	<b>3,181</b>	<b>5,271</b>	<b>4,386</b>	<b>7,266</b>
0%-30% AMI	292	483	225	373	517	857
31%-50% AMI	220	365	283	468	503	833
51%-80% AMI	304	504	485	803	789	1,308
81%-100% AMI	127	211	407	675	535	886
100% + AMI	260	431	1,781	2,951	2,041	3,382
<b>Niobrara</b>	<b>-</b>	<b>2</b>	<b>-</b>	<b>6</b>	<b>-</b>	<b>8</b>
0%-30% AMI	-	1	-	1	-	2
31%-50% AMI	-	0	-	1	-	1
51%-80% AMI	-	0	-	2	-	2
81%-100% AMI	-	0	-	1	-	1
100% + AMI	-	1	-	2	-	3
<b>Platte</b>	<b>74</b>	<b>148</b>	<b>230</b>	<b>460</b>	<b>304</b>	<b>607</b>
0%-30% AMI	11	21	16	32	27	54
31%-50% AMI	26	52	25	49	51	101
51%-80% AMI	13	25	46	91	58	116
81%-100% AMI	3	6	23	45	25	51
100% + AMI	22	43	122	242	143	286

Note: Holds latest CHAS tenure and income distribution constant.

Source: HUD CHAS 2020 estimates, American Housing Survey, and Root Policy Research.

## Recommendations from Past Studies

The **2015 City of Laramie Housing Study**<sup>8</sup> presents a housing profile and demand analysis for the City of Laramie. A summary of recommended strategies to address housing needs in the report includes:

- Establish a program to increase housing awareness and education—including a homebuyer education program—to educate the community on the benefits of appropriate housing for the residents of Laramie.
- Encourage major employers of Laramie to partner and financially assist the community in developing housing programs including the City's first-time homebuyer, down payment assistance and immediate housing need programs and incentivize collaboration of major employers to implement needed workforce housing projects.
- Advocate for the development of housing for special populations, including the elderly, and support services. This includes new construction and rehabilitation and modification of homes.
- Develop affordable on- and off-campus housing options for students at the University of Wyoming, WyoTech, and Laramie County Community College. Monitor housing inventory and review its appropriateness and condition.
- Create a fund for affordable housing gap financing, secured by private investors.
- Invest in a community land bank program to ensure availability of land for housing development in the future. Such a program could be combined with a nuisance or neglected buildings ordinance that targets vacant and dilapidated housing structures.
- Implement a housing code inspection and rental licensing program to ensure that housing conditions are monitored and enforced throughout the year. This program can also be combined with a nuisance abatement initiative and an ordinance that focuses on neglected and vacant buildings, particularly those that are in a state of disrepair.
- Invest in housing rehabilitation programs to meet the needs of low to moderate-income owner households. Invest in a purchase/rehab/resale program to meet the affordable entry level homeowner/renter needs of low- to moderate-income households.
- Encourage the development of mixed-income duplex, triplex, patio, and townhome units with standard amenities to meet the rental housing needs of low- to moderate-

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<sup>8</sup> <https://www.cityoflaramie.org/DocumentCenter/View/8275/LARAMIE-WYOMING-HOUSING-STUDY---2030-COL?bidid=>

income elderly and workforce households. Encourage mixed-income single-family homes, duplexes, and townhomes with complete accessibility design for moderate-income elderly households.

- Create a housing rehabilitation/modification program complete with visitability and accessibility design, to meet the needs of very-low- to moderate-income households, including elderly and special population households. Invest in an owner/rental housing initiative for special needs populations. Develop units for “special populations,” including persons with a physical and/or chronic mental disability, including temporary shelter housing.
- Develop assisted living housing units with supportive/specialized services for near-independent and frail-elderly residents.
- Invest in a single family lease-to-own program to meet the affordable housing needs of moderate-income households.
- Invest in single room occupancy housing for low-to-moderate income single workers.
- Encourage the development of mixed-income, 1- and 2-bedroom owner/renter units in downtown areas, including rehabilitating upper-level commercial structures.
- Increase rental housing via the development of accessory housing, such as in-law suites or “efficiency homes” on undersized vacant lots.

**The 2023 Laramie Growth Area Plan<sup>9</sup>** is aimed at guiding future decisions related to land use, housing, economic development, and service delivery in the unincorporated County area near the City of Laramie. It covers the region where development and conservation activities are of mutual interest to the residents and decision-makers of both the County and City. The report was a joint effort by Albany County and the City of Laramie.

The report emphasizes the provision of diverse and attainable housing, a guiding principle developed from public input and later enhanced in consultation with County and City leadership and staff. Housing choices can be expanded by promoting a broader range of housing that addresses changing demographics and the need for more workforce housing and create new commercial areas that provide essential services and that are supported by housing at a variety of densities.

To implement the growth plan effectively, it is necessary to follow the zoning and development regulations consistent with the Growth Plan Map and guiding principles. After adopting the plan, Albany County and the City of Laramie are expected to amend the zoning and subdivision regulations to align with the plan. The revisions should implement

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<sup>9</sup> <https://www.cityoflaramie.org/1215/Laramie-Area-Growth-Plan>

the plan and amend county zoning to promote the agreed-upon development pattern described in the Growth Plan Map. This would help in reducing rural residential sprawl by preparing the area for higher density and extension of city services. The amendments should focus on aligning the process for landowners to develop their properties as described in the plan. However, it is essential to ensure that property owners who do not wish to subdivide can continue to enjoy their property as it exists today.

According to the **2022 Affordable Housing Task Force Report**<sup>10</sup>, the City of Cheyenne has acknowledged the need for policies and mechanisms to increase the supply of all types of housing in the area. The report mentions several recent policies and plans aimed at making housing more affordable, such as the inclusion of Accessory Dwelling Units (ADUs) in residential zones and the addition of multi-family housing to neighborhood business zones. These policies not only increase density, but also make better use of available land.

A summary of recommended strategies to address housing needs in the report includes:

- Create and maintain a local housing trust fund in partnership with the county.
- Create a tap fee deferral program that would delay payment of the tap fee decreasing upfront costs of development and encouraging faster and greater development and create a fee waiver program for affordable housing developments.
- Encourage more density by eliminating certain zoning requirements such as density maximum, lot area minimums, height restrictions, and 20 foot set back requirements. Additionally, lifting the requirements for more expensive building materials can help reduce building costs.
- Create and maintain a Housing Affordability Office charged with tasks including: developing a housing affordability strategy to ensure long-term sustainability that will be in place throughout the community and political transitions; completing and maintaining a parcel data study; coordinating additional community development plans that affect housing, i.e. transportation; advocating at the State level for tools and resources that support housing affordability; identifying additional funding and resources; serving as a liaison to connect partners; identifying affordable housing options other than mobile homes in parks; supporting the Community Land Trust Model and Land Bank Initiative; and supporting sweat equity programs

**The 2023 Housing Study Commissioned by the Greater Cheyenne Chamber of Commerce**<sup>11</sup> provides an assessment of housing needs during the next five years along with consideration for additional housing from employees coming to the area for the

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<sup>10</sup> <https://cheyenneleads.org/wp-content/uploads/2023/05/Chamber-Housing-Study-2022.pdf>

<sup>11</sup> [https://www.cheyennechamber.org/\\_files/ugd/bc6a36\\_67678ce8ad4544c5843e443d809e59f2.pdf](https://www.cheyennechamber.org/_files/ugd/bc6a36_67678ce8ad4544c5843e443d809e59f2.pdf)

Sentinel Project, which is a missile system replacement project estimated to take 10 years and bring in 3,515 direct positions and 4,006 indirect positions.

A summary of recommended strategies to address housing needs in the report includes:

- Making any possible changes to allow for more multi-family housing. Examples of changes include removing height restrictions, rezoning land, and changing parking restrictions. Apartments are key to meeting demand because they can house more people in fewer projects. It's important to note that the positions tied to the Sentinel Project are relatively short-term, with on-base operations and construction projects lasting for 10 years before moving on to Montana. Therefore, estimations for home ownership for those positions may be overstated if workers arrive towards the end of the project.
- Allow for more single-family homes that are more densely built by changing the minimum lot size. This can lead to lower land costs per unit and allow for condos and townhomes, which are the best entry option to homeownership, considering the current construction costs.
- Expand on-base housing and near-base housing. An on-base complex can house operations staff, while large complexes near the base can be used to house construction crews and non-military personnel.

Appendix

The following tables show AMI limits by county, examples of establishment types by industry, and federal poverty thresholds by household size.

Figure V-38.  
AMI Limits, Southeast Region, Counties, 2021

2021 2-person AMI	Albany	Goshen	Laramie	Niobrara	Platte
30% AMI	\$19,440	\$19,440	\$20,070	\$19,440	\$19,440
50% AMI	\$32,400	\$32,400	\$33,450	\$32,400	\$32,400
80% AMI	\$25,920	\$25,920	\$26,760	\$25,920	\$25,920
100% AMI	\$64,800	\$64,800	\$66,900	\$64,800	\$64,800
120% AMI	\$77,760	\$77,760	\$80,280	\$77,760	\$77,760

Source: U.S. Department of Housing and Urban Development.

Figure V-39.

**AMI Limits, Southeast Region, Counties, 2022**

2022 2-person AMI	Albany	Goshen	Laramie	Niobrara	Platte
30% AMI	\$21,360	\$21,030	\$22,440	\$21,030	\$21,030
50% AMI	\$35,600	\$35,050	\$37,400	\$35,050	\$35,050
80% AMI	\$28,480	\$28,040	\$29,920	\$28,040	\$28,040
100% AMI	\$71,200	\$70,100	\$74,800	\$70,100	\$70,100
120% AMI	\$85,440	\$84,120	\$89,760	\$84,120	\$84,120

Source: U.S. Department of Housing and Urban Development.

Figure V-40.

**QCEW Establishment Examples by Industry**

Establishment Examples	
<b>Goods Producing</b>	
<b>Natural Resources &amp; Mining</b>	Farms, ranches, dairies, greenhouses, nurseries, orchards, hatcheries, mine operation and mining support activities.
<b>Construction</b>	General contractors, design-builders, construction managers, turnkey contractors.
<b>Manufacturing</b>	Plants, factories, mills.
<b>Service Providing</b>	
<b>Trade, Transportation, &amp; Utilities</b>	Wholesale merchants, distributors, shippers, import/export merchants, office supply retailers, computer and software retailers, building materials dealers, plumbing supply retailers, electrical supply retailers, electric power, natural gas, steam supply, water supply, and sewage removal.
<b>Information</b>	Software publishing, broadcasting and content providers, telecommunications, computing infrastructure providers, data processing, Web hosting.
<b>Financial Activities</b>	Commercial banks, credit unions, rental and leasing services.
<b>Professional &amp; Business Services</b>	Legal advice and representation, accounting, bookkeeping, payroll services, architectural, engineering, consulting services.
<b>Education &amp; Health Services</b>	Schools, colleges, universities, hospitals, nursing care facilities.
<b>Leisure &amp; Hospitality</b>	Hotels, restaurants, gambling establishments.
<b>Other Services</b>	Equipment and machinery repairing, grantmaking, advocacy, and providing drycleaning and laundry services, personal care services.
<b>Public Administration</b>	Federal, state, and local government agencies.

Source: BLS Quarterly Census of Employment and Wages.

**Figure V-41.**  
**Federal Poverty Thresholds by Household Size, 2010**

Size of Family Unit	Weighted Average Thresholds	Related Children Under 18 Years								
		None	One	Two	Three	Four	Five	Six	Seven	Eight or More
One person (unrelated individual)	\$11,139									
Under 65 years	\$11,344	\$11,344								
65 years and over	\$10,458	\$10,458								
Two people	\$14,218									
Householder under 65 years	\$14,676	\$14,602	\$15,030							
Householder 65 years and over	\$13,194	\$13,180	\$14,973							
Three people	\$17,374	\$17,057	\$17,552	\$17,568						
Four people	\$22,314	\$22,491	\$22,859	\$22,113	\$22,190					
Five people	\$26,439	\$27,123	\$27,518	\$26,675	\$26,023	\$25,625				
Six people	\$29,897	\$31,197	\$31,320	\$30,675	\$30,056	\$29,137	\$28,591			
Seven people	\$34,009	\$35,896	\$36,120	\$35,347	\$34,809	\$33,805	\$32,635	\$31,351		
Eight people	\$37,934	\$40,146	\$40,501	\$39,772	\$39,133	\$38,227	\$37,076	\$35,879	\$35,575	
Nine people or more	\$45,220	\$48,293	\$48,527	\$47,882	\$47,340	\$46,451	\$45,227	\$44,120	\$43,845	\$42,156

Source: U.S. Census Bureau.

**Figure V-42.**  
**Federal Poverty Thresholds by Household Size, 2021**

Size of Family Unit	Weighted Average Thresholds	Related Children Under 18 Years								
		None	One	Two	Three	Four	Five	Six	Seven	Eight or More
One person (unrelated individual)	\$13,788									
Under 65 years	\$14,097	\$14,097								
65 years and over	\$12,996	\$12,996								
Two people	<del>\$17,529</del>									
Householder under 65 years	\$18,231	\$18,145	\$18,677							
Householder 65 years and over	\$16,400	\$16,379	\$18,606							
Three people	\$21,559	\$21,196	\$21,811	\$21,831						
Four people	\$27,740	\$27,949	\$28,406	\$27,479	\$27,575					
Five people	\$32,865	\$33,705	\$34,195	\$33,148	\$32,338	\$31,843				
Six people	\$37,161	\$38,767	\$38,921	\$38,119	\$37,350	\$36,207	\$35,529			
Seven people	\$42,156	\$44,606	\$44,885	\$43,925	\$43,255	\$42,009	\$40,554	\$38,958		
Eight people	\$47,093	\$49,888	\$50,329	\$49,423	\$48,629	\$47,503	\$46,073	\$44,585	\$44,207	
Nine people or more	\$56,325	\$60,012	\$60,303	\$59,501	\$58,828	\$57,722	\$56,201	\$54,826	\$54,485	\$52,386

Source: U.S. Census Bureau.



## SECTION VI.

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### SOUTHWEST REGION

## SECTION VI.

### Southwest Region

This regional summary provides demographic, economic, and housing market data for the Southwest Region. Wyoming's Southwest Region is comprised of Lincoln county, Sublette county, Sweetwater county, and Uinta county.

#### Southwest Region



#### Demographic Trends

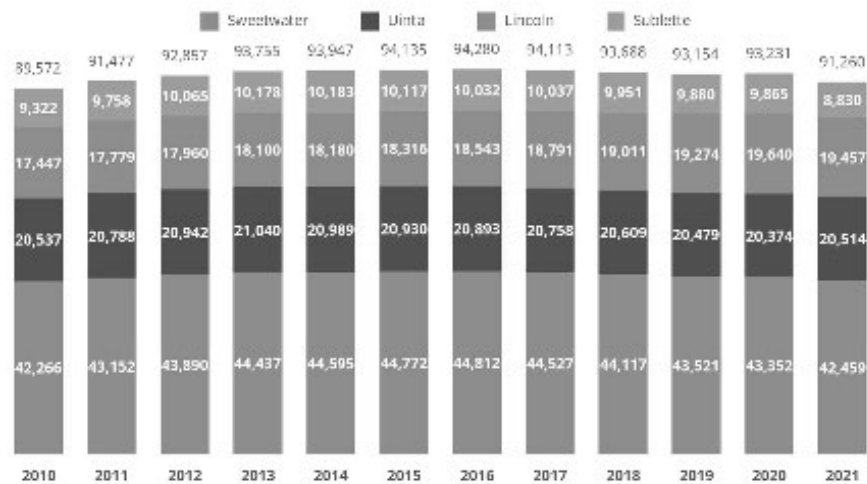
**Population growth.** The population of Wyoming's Southwest Region grew by around 2% from 2010 to 2021, while the State of Wyoming's population grew by around 5.7% over the same period. As shown in Figure VI-1, the Southwest Region's population increased each year from 91,582 residents in 2010 to over 96,200 residents in 2016 and decreased modestly each year from 2017 to 95,173 residents in 2019. The population grew slightly in 2020 before falling to 93,281 residents in 2021. This pattern resembles recent changes in the State of Wyoming's population, which grew each year from 2010 to 2017 and has modestly decreased since.

In 2021, Sweetwater county is the most populous county in the Region with over 40,000 residents, accounting for 47% of the Region's population. Uinta and Lincoln counties have populations of around 20,000 residents each and account for 22% and 21% of the Region's

population respectively. Sublette county is the smallest in the Region with a population of less than 9,000 residents (10% of the regional population).

Over the time studied, Sweetwater county saw its population increase by less than 200 residents overall from 2010 to 2021. The population of Lincoln county experienced the largest growth, gaining over 2,000 residents (11.5% of its 2010 population) over the time studied. Sublette county lost nearly 500 residents (5.3% of its 2010 population), and Uinta county saw its population decrease by 23 residents overall.

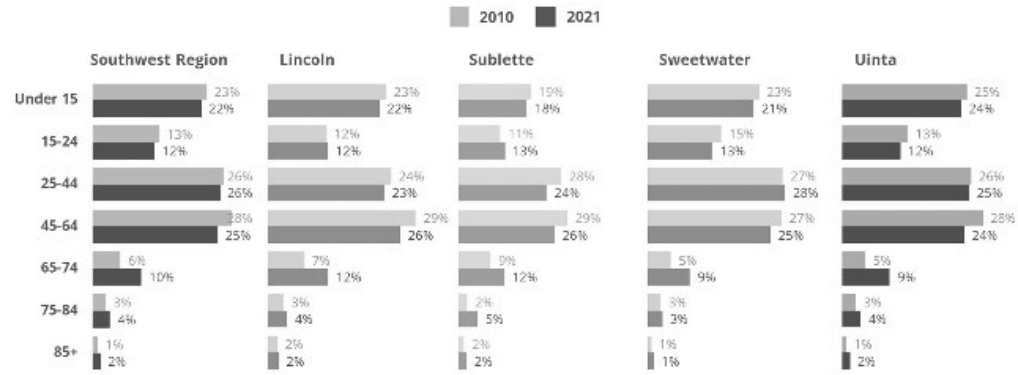
**Figure VI-1.**  
**Population, Southwest Region, 2010-2021**



Source: 2010-2021 5-year ACS and Root Policy Research.

**Age distribution.** As shown in Figure VI-2, between 2010 and 2021, the Southwest Region's share of residents aged 65 and older increased by around six percentage points from 9% to 15%. At the same time, the Region's share of residents aged 25-64, who are most likely to be in the workforce, decreased by around three percentage points from 54% to 51%. This aging pattern was present in each county in the Southwest Region, but most pronounced in Sublette county where there was an eight percentage point increase in the share of the population aged 65+ and a seven percentage point decrease in the share of the population aged 25-64. The Southwest Region's growing senior population underscores the importance of aging-friendly housing options moving forward, while the Region's shrinking share of working-aged individuals raises concerns about a shrinking workforce.

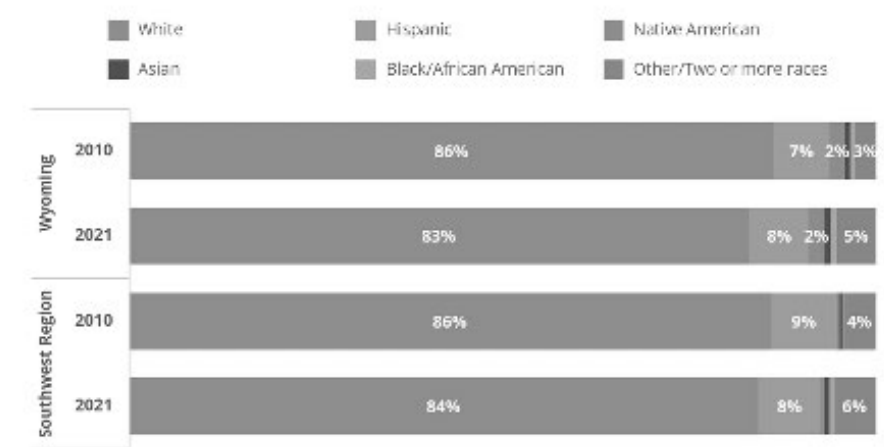
**Figure VI-2.**  
**Age Distribution, Southwest Region, 2010 and 2021**



Source: 2010 and 2021 5-year ACS and Root Policy Research.

**Racial and ethnic distribution.** As shown in Figure VI-3, the Southwest Region's racial and ethnic makeup closely resembles Wyoming's racial and ethnic distribution. In 2021, the share of Southwest Region residents identifying as Native American is one percentage point smaller than that of Wyoming's population. The shares of Southwest Region residents identifying as non-Hispanic White and Other/Two or more races are one percentage point higher than those of Wyoming's population. The Southwest Region's population has become slightly more diverse since 2010, primarily due to an increase in the share of residents identifying as Other/Two or more races.

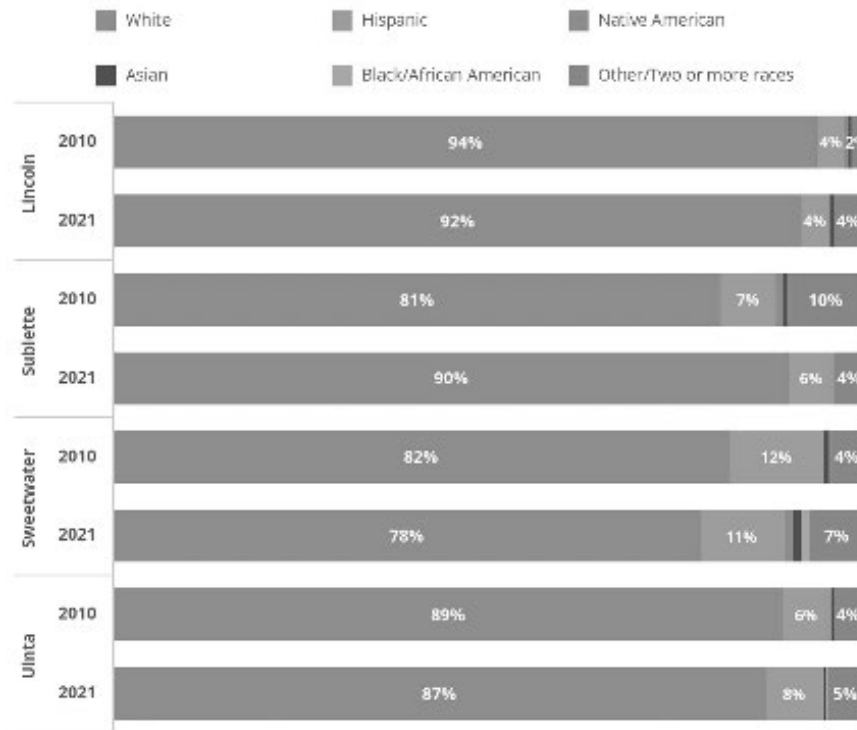
**Figure VI-3.**  
**Race and Ethnicity, Wyoming and Southwest Region, 2010 and 2021**



Note: The categories White, Native American, Asian, Black/African American, and Other/Two or more races include only non-Hispanic. The Hispanic category refers to Hispanics of any race. 0% and 1% labels are not shown.  
Source: 2010 and 2021 5-year ACS and Root Policy Research.

Figure VI-4 shows racial and ethnic distributions for each county within the Southwest Region in 2010 and 2021. The Southwest Region and each of its constituent counties except for Sublette county have become more racially and ethnically diverse since 2010. Sweetwater county is the most racially and ethnically diverse county within the Southwest Region. Of the counties in the Southwest Region, Sweetwater county has the largest shares of residents identifying as Hispanic or Other/Two or more races. The share of residents in Sublette county identifying as non-Hispanic White has increased by nine percentage points since 2010. This is primarily due to a decrease in the share of residents identifying as Other/Two or more races but is also due to decreases in the shares of Hispanic, Native American, and Asian residents.

**Figure VI-4.**  
**Race and Ethnicity, Southwest Region, Counties 2010 and 2021**



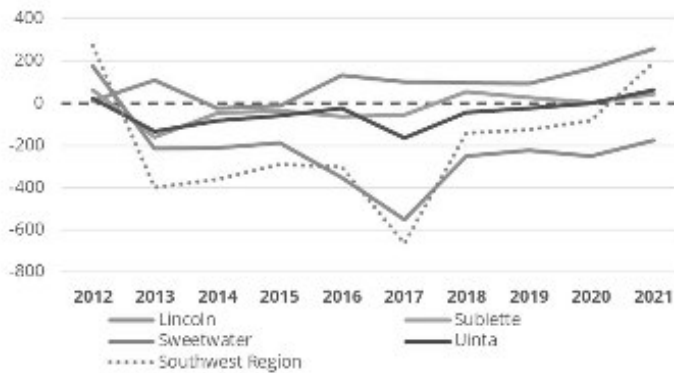
Note: The categories White, Native American, Asian, Black/African American, and Other/Two or more races include only non-Hispanic. The Hispanic category refers to Hispanics of any race. 0% and 1% labels are not shown.

Source: 2010 and 2021 5-year ACS and Root Policy Research.

**Migration.** Figure VI-5 shows net migration data based on year-to-year address changes reported on individual income tax returns filed with the IRS for each county in Wyoming's Southwest Region from 2012 to 2021. Net migration in the Southwest Region was positive in 2012 before becoming negative in 2013. Negative net migration continued in the Southwest Region, peaking in 2017 with the energy sector's contraction, until becoming positive in 2021. Because migration-driven population change was most significant in Sweetwater county, the Region's net migration trends mirrored those of Sweetwater county. Lincoln county is the only county in the Region for which total net migration was generally positive during this period.

**Figure VI-5.  
Net Migration,  
Southwest  
Region, Counties,  
2012-2021**

Source:  
Internal Revenue Service and  
Root Policy Research.

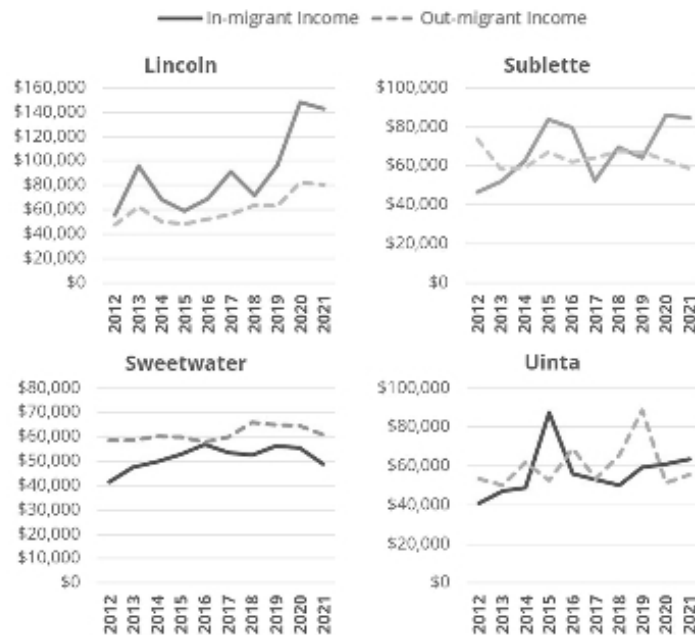


IRS data also provide the total adjusted gross income, which allows the estimation of the average adjusted gross income<sup>1</sup> for inflow and outflow returns each year. Figure VI-6 shows the difference between the average income of in-migrants and the average income of out-migrants for each county in the Southwest Region from 2012 to 2021 to identify migration-driven trends in income. It should be noted that these are averages and can be skewed by a small number of very high income households in some of the years. Key trends are outlined here:

- In Sweetwater county out-migrants from the county had higher average incomes than in-migrants to the county for each year studied. Net migration has been negative for almost the entire time studied, indicating that higher income households are leaving Sweetwater county at higher rates than lower income households are moving to the county.
- In-migrants to Lincoln county have consistently had higher average incomes than out-migrants from Lincoln county since 2012.

<sup>1</sup> Adjusted Gross Income (AGI) is defined as gross income minus adjustments to income. Gross income includes your wages, dividends, capital gains, business income, retirement distributions as well as other income. Adjustments to income include such items as Educator expenses, Student loan interest, Alimony payments or contributions to a retirement account.

**Figure VI-6.**  
**Average Income of In-migrants and Out-migrants, Southwest Region,**  
**Counties 2012-2021**



Source: Internal Revenue Service and Root Policy Research.

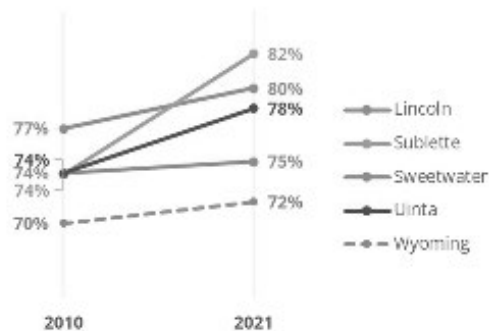
**Homeownership.** Homeownership rates for each county in the Southwest Region are shown in Figure VI-7. In 2021, each county in the Region has a homeownership rate higher than that of Wyoming. Homeownership is highest in Sublette county (82%) and Lincoln county (80%). Between 2010 and 2021, homeownership rates increased in each county in the Region.

While it is estimated that Sublette county saw the greatest increase in homeownership over the time studied, it should be noted that this county's estimated homeownership rate had substantial margins of error in both 2010 and 2021. The populations of all counties in the region have aged since 2010, but Sublette county saw the greatest increase in the share of the population aged 65+ (+8 percentage points). As individuals aged 65 and older are more likely to be homeowners, this could result in an increased homeownership rate for Sublette county.



**Figure VI-7.  
Homeownership Rates,  
Southwest Region, Counties  
2010 and 2021**

Source:  
2010 and 2021 5-year ACS and Root Policy Research.



**Income and poverty.** Figure VI-8 shows median income for homeowners and renters in each county in Wyoming's Southwest Region. Key trends in median income by tenure include:

- In 2021, median income for renters in the Southwest Region is around 50-60% of owner income. Between 2010 and 2021, renter income decreased as a percentage of owner income in Lincoln, Sublette, and Sweetwater counties. Renter income grew as a share of owner income in Uinta county.
- From 2010 to 2021, median income for both owners and renters increased in Uinta county. Median owner incomes increased as median renter incomes decreased in Lincoln, Sublette, and Sweetwater counties.
- In 2021, each Southwest Region county's median renter income is higher than Wyoming's median renter income. Every county in the Southwest Region except for Uinta county has a higher median homeowner income than Wyoming.

**Figure VI-8.  
Median Income by  
Tenure, Southwest  
Region, Counties, 2010  
and 2021**

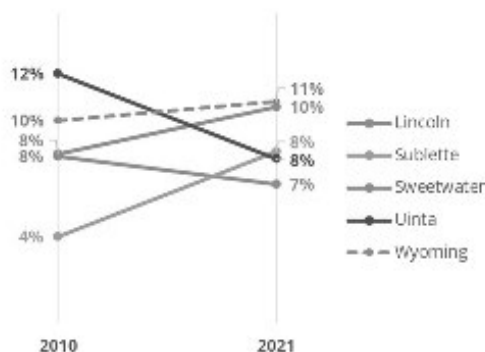
Source:  
2010 and 2021 5-year ACS and Root Policy  
Research.

	Median Income		2010-2021 Change	
	2010	2021	Amount	Percent
<b>Lincoln</b>				
Owner	\$63,002	\$82,000	\$18,998	30%
Renter	\$44,625	\$42,340	-\$2,285	-5%
<b>Sublette</b>				
Owner	\$78,688	\$90,532	\$11,844	15%
Renter	\$56,827	\$55,515	-\$1,312	-2%
<b>Sweetwater</b>				
Owner	\$77,186	\$87,644	\$10,458	14%
Renter	\$52,024	\$49,024	-\$3,000	-6%
<b>Uinta</b>				
Owner	\$72,040	\$80,522	\$8,482	12%
Renter	\$28,241	\$40,012	\$11,771	42%
<b>Wyoming</b>				
Owner	\$64,489	\$81,875	\$17,386	27%
Renter	\$33,550	\$39,506	\$5,956	18%

Poverty rates for each county in Wyoming's Southwest Region are presented in Figure VI-9. As of 2021, every county in the Region has a lower poverty rate than Wyoming's 11%. Between 2010 and 2021, poverty rates increased by four percentage points in Sublette county and by two percentage points in Sweetwater county. Uinta county's poverty rate saw the largest decrease at four percentage points, while Lincoln county's poverty rate decreased by one percentage point between 2010 and 2021.

**Figure VI-9.  
Poverty Rate, Southwest  
Region, Counties, 2010 and  
2021**

Source:  
2010 and 2021 5-year ACS and Root Policy  
Research.

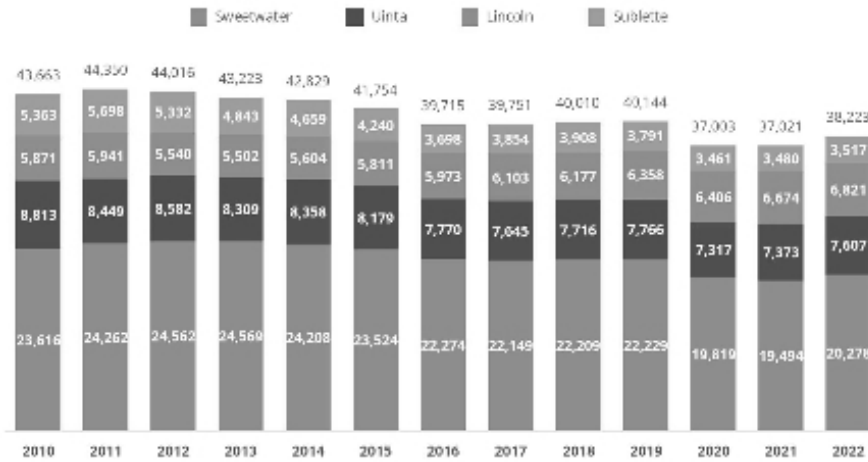


## Economic Trends

**Employment.** As shown in Figure VI-10 below, the Southwest Region lost over 5,000 jobs between 2010 and 2022. Total employment in the Southwest Region increased from 43,663 jobs to 44,350 jobs in 2011 and gradually declined from 2011 to 39,715 jobs in 2016. Employment slowly rose from 2016 to 40,144 jobs in 2019 before the Region's employment contracted during the COVID-19 pandemic. Total employment in the Region has gradually increased since 2020 but has not yet risen to pre-pandemic levels.

In addition to being the county with the greatest population growth in the Region, Lincoln county is the only county for which employment increased over the time studied. As of 2022, Sweetwater county is home to 47% of the Region's population and accounts for 53% of regional employment. Uinta and Lincoln counties are home to 22% and 21% of Southwest Region residents and account for 20% and 18% of regional employment respectively. Sublette county's population is 10% of the regional population while its employment represents 9% of regional employment.

**Figure VI-10.**  
**Total Employment by County, Southwest Region, Counties, 2010 to 2022**



Source: Quarterly Census of Employment and Wages and Root Policy Research.

The three largest industries in the Southwest Region by employment are Education & Health Services (22% of total jobs); Trade, Transportation, & Utilities (21% of total jobs); and Natural Resources & Mining (12% of total jobs).

Figures VI-11 to VI-14 provide a detailed overview of employment within each county of Wyoming's Southwest Region. Figures are presented in the order of highest to lowest total employment.

As shown in Figure VI-11, total employment in Sweetwater county fell by 14% (-3,338 jobs) between 2010 and 2022. In 2022, Sweetwater county's three largest sectors by employment are Trade, Transportation, & Utilities (4,291 jobs), Education & Health Services (3,892 jobs), and Natural Resources & Mining (3,208 jobs). Natural Resources & Mining accounted for over 5,300 jobs in 2010, making it the Region's largest industry by employment in 2010, but has since experienced a 40% reduction in total employment. The decline of the Natural Resources & Mining industry in Sweetwater county underlies the region's negative migration. Only three of Sweetwater county's industries experienced growth in employment since 2010, and none of these exceeded 4% employment growth.

**Figure VI-11.**  
**Employment by Industry, Sweetwater County, 2010 and 2022**

Sweetwater County	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
Goods Producing	8,396	6,228	-2,168	-26%
Natural Resources & Mining	5,329	3,208	-2,121	-40%
Construction	1,768	1,698	-70	-4%
Manufacturing	1,299	1,322	23	2%
Service Providing	15,220	14,050	-1,170	-8%
Trade, Transportation, & Utilities	4,824	4,291	-533	-11%
Information	279	181	-98	-35%
Financial Activities	852	558	-294	-35%
Professional & Business Services	1,142	1,143	1	0%
Education & Health Services	3,785	3,892	107	3%
Leisure & Hospitality	2,262	2,350	88	4%
Other Services	597	416	-181	-30%
Public Administration	1,479	1,219	-260	-18%
All Industries	23,616	20,278	-3,338	-14%

Source: Quarterly Census of Employment and Wages and Root Policy Research.

Figure VI-12 below shows employment in Uinta county. Between 2010 and 2022, employment in Uinta county decreased by 1,206 jobs or 14%. In both 2010 and 2022, Uinta county's three largest sectors by employment are Education & Health Services (2,048 jobs), Trade, Transportation, & Utilities (1,792 jobs), and Construction (834 jobs). The Natural Resources & Mining industry lost more jobs than any other industry in the county (-625 jobs or -81% of its 2010 jobs). The Information industry experienced the largest job growth, gaining 76 jobs between 2010 and 2022.

**Figure VI-12.**  
**Employment by Industry, Uinta County, 2010 and 2022**

Uinta County	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
Goods Producing	2,391	1,266	-1,125	-47%
Natural Resources & Mining	771	146	-625	-81%
Construction	1,360	834	-526	-39%
Manufacturing	260	286	26	10%
Service Providing	6,422	6,341	-81	-1%
Trade, Transportation, & Utilities	1,777	1,792	15	1%
Information	232	308	76	33%
Financial Activities	351	293	-58	-17%
Professional & Business Services	480	382	-98	-20%
Education & Health Services	2,099	2,048	-51	-2%
Leisure & Hospitality	772	822	50	6%
Other Services	137	112	-25	-18%
Public Administration	574	584	10	2%
All Industries	8,813	7,607	-1,206	-14%

Source: Quarterly Census of Employment and Wages and Root Policy Research.

Figure VI-13 below shows employment detail for Lincoln county. Gaining 950 total jobs between 2010 and 2022, Lincoln county is the only county in the Region for which employment increased over the time studied. In 2022, Education & Health Services is the county's largest industry by employment with 1,716 jobs, followed by Trade, Transportation, & Utilities with 1,357 jobs and Construction with 1,037 jobs. The Construction industry added more jobs since 2010 (+334 jobs) than any other industry in the county, while Natural Resources & Mining lost more jobs than any other industry (-82 jobs).

**Figure VI-13.**  
**Employment by Industry, Lincoln County, 2010 and 2022**

Lincoln County	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
Goods Producing	1,567	1,835	268	17%
Natural Resources & Mining	712	630	-82	-12%
Construction	703	1,037	334	48%
Manufacturing	152	168	16	11%
Service Providing	4,304	4,986	682	16%
Trade, Transportation, & Utilities	1,140	1,357	217	19%
Information	160	158	-2	-1%
Financial Activities	163	229	66	40%
Professional & Business Services	339	434	95	28%
Education & Health Services	1,479	1,716	237	16%
Leisure & Hospitality	507	606	99	20%
Other Services	110	136	26	24%
Public Administration	406	350	-56	-14%
All Industries	5,871	6,821	950	16%

Source: Quarterly Census of Employment and Wages and Root Policy Research.

As shown in Figure VI-14, total employment in Sublette county fell by 34% (-1,846 jobs) between 2010 and 2022. Nine of the eleven industries in the county have decreased in employment since 2010. Natural Resources & Mining is the county's largest industry by employment in 2022 with 627 jobs, despite having sustained the most significant job losses in the county (-1,039 jobs, or a loss of 62% of its 2010 employment). Education & Health Services (599 jobs) and Trade, Transportation, & Utilities (555 jobs) are the county's second and third largest industries by employment. The Financial Activities industry saw the largest increase in employment, adding 38 jobs since 2010.

**Figure VI-14.**  
**Employment by Industry, Sublette County, 2010 and 2022**

Sublette County	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
Goods Producing	2,512	1,076	-1,436	-57%
Natural Resources & Mining	1,666	627	-1,039	-62%
Construction	794	399	-395	-50%
Manufacturing	52	50	-2	-4%
Service Providing	2,851	2,441	-410	-14%
Trade, Transportation, & Utilities	720	555	-165	-23%
Information	33	17	-16	-48%
Financial Activities	107	145	38	36%
Professional & Business Services	357	260	-97	-27%
Education & Health Services	652	599	-53	-8%
Leisure & Hospitality	484	388	-96	-20%
Other Services	126	101	-25	-20%
Public Administration	372	376	4	1%
All Industries	5,363	3,517	-1,846	-34%

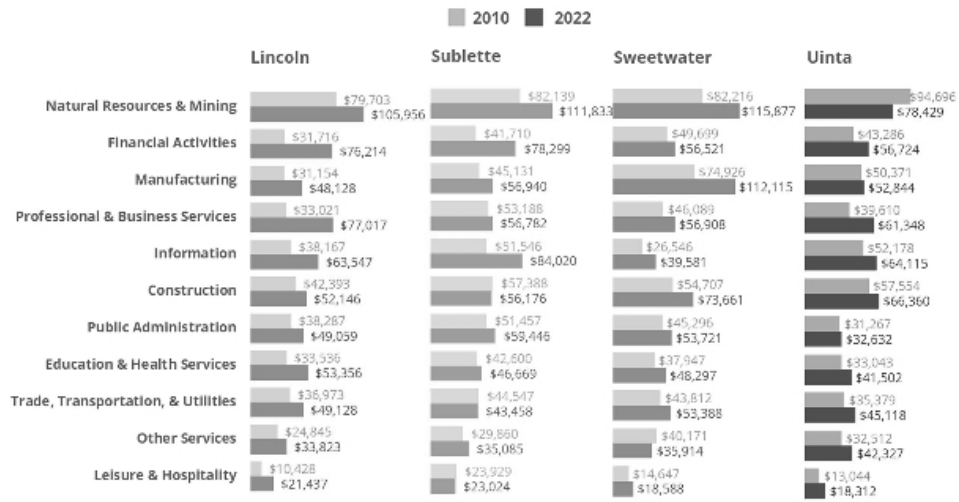
Source: Quarterly Census of Employment and Wages and Root Policy Research.

**Wages.** Figure VI-15 shows average annual wages by industry for each county in Wyoming's Southwest Region. Between 2010 and 2022, average annual wages grew for each industry in Lincoln, Sweetwater, and Uinta counties. Average annual wages increased for each industry in Sublette county except for Construction, Leisure & Hospitality, and Trade, Transportation, & Utilities, where average annual wages decreased over the time studied.

The Natural Resources & Mining industry has the highest average annual wages of any industry in each county of the Southwest Region. Notably, employment in this industry has decreased since 2010 in every county in the Region. In Sweetwater county, the industry with the second highest average annual wages is Manufacturing. Sublette county's second highest paying industry is Information, while Lincoln county's is Professional & Business Services. In Uinta county, Construction has the second highest average annual wages.



**Figure VI-15.**  
**Average Annual Wages by Industry, Southwest Region, Counties, 2010 and 2022**



Source: Quarterly Census of Employment and Wages and Root Policy Research.

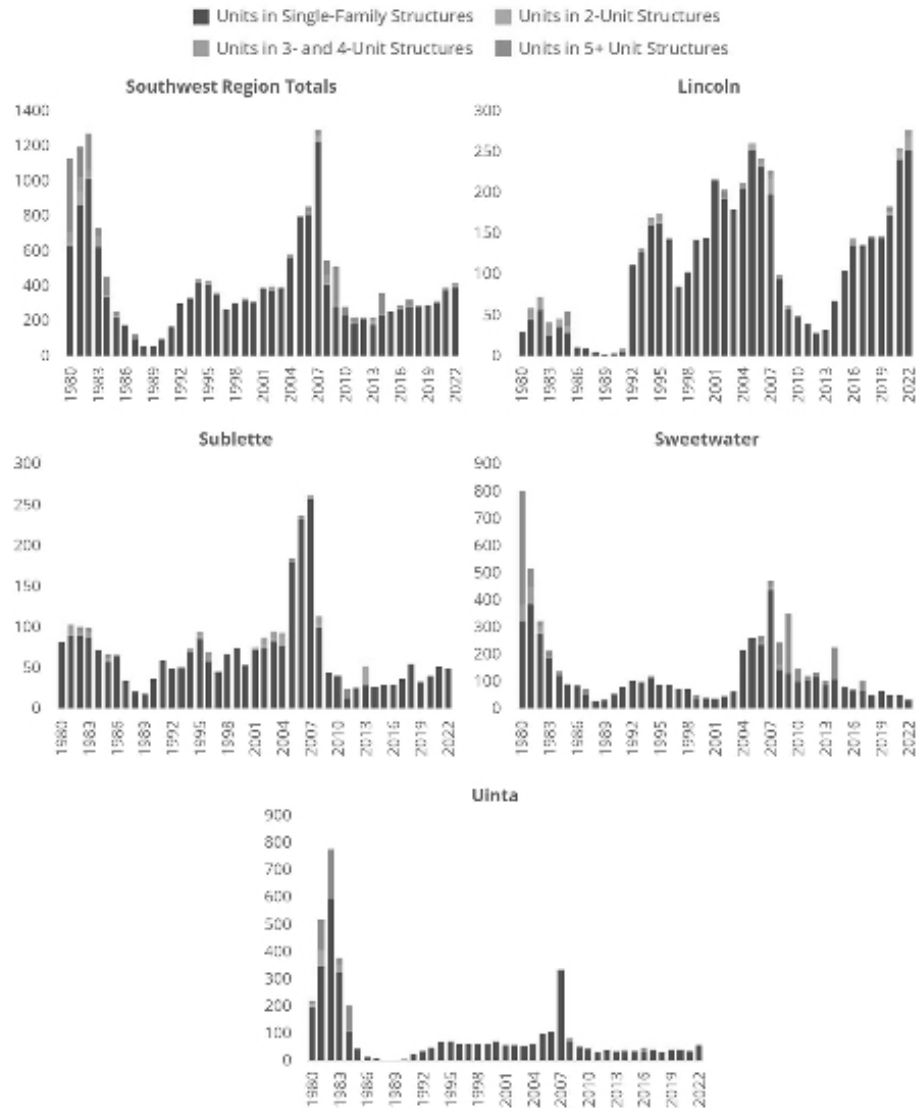
## Housing Market Trends

**Residential building permits.** Residential building permits in Wyoming's Southwest Region have been dominated by units in single-family structures. Around 87% of units permitted in the Southwest Region since 1980 were units in single-family structures and around 9% were units in multifamily structures of 5 units or more. Units in 2-unit structures accounted for 2% of units permitted, as did units in 3- and 4-unit structures. Permitting for multifamily structures has been strongest in Sweetwater county.

Figure VI-16 below shows trends in residential building permits for the Southwest Region and each of its constituent counties. Please note that scale differs in each geography's section of the figure based on total permits issued.

Overall, the Southwest Region saw high volumes of building permits in the early 1980s due to high levels of permitting in Uinta and Sweetwater counties. The 1980s recession brought a significant drop in building permits issued. Nearly 1,300 permits were issued in 1982, but this figure dropped each year to a low of 55 permits issued in 1989. Permitting activity contracted again with the 2008 recession. Issuance of building permits has returned to pre-recession levels in Lincoln county but has remained low for the Southwest Region and each of its other counties.

**Figure VI-16.**  
**Building Permits by Units in Structure, Southwest Region, Counties, 1980-**  
**2022**

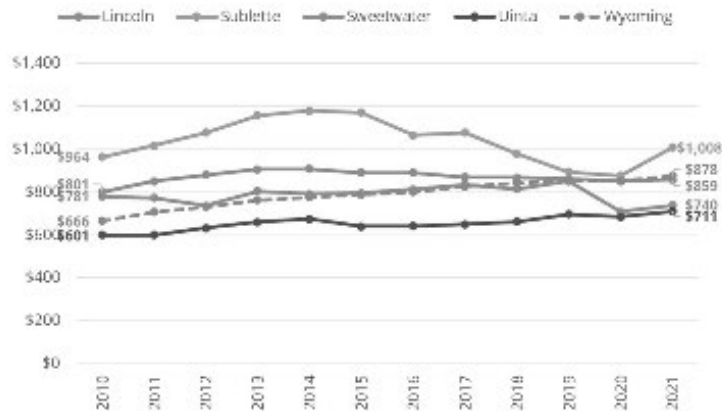


Source: U.S. Census Building Permits Survey and Root Policy Research.

**Median rent.** Figure VI-17 shows trends in median gross rent for the state of Wyoming and the constituent counties of the Southwest Region. Wyoming and Sublette, Sweetwater, and Uinta counties experienced growth in median gross rents between 2010 and 2021, while Lincoln county was the only county in the state to see its median gross rent decrease over the same period. As of 2021, Sublette county has the Region's highest median gross rent at just over \$1,000 and is the only county in the Region for which median gross rent is higher than that of the state. Sweetwater county's median gross rent falls just below Wyoming's \$878, while Lincoln county and Uinta county have the lowest median gross rents in the Region at \$740 and \$711 respectively.

**Figure VI-17.**  
**Median Gross Rent, Wyoming and Southwest Region, Counties, 2010-2021**

Source:  
2010-2021 5-year ACS and  
Root Policy Research.



The median rent data shown above reflects rents for all rental units until 2021 according to ACS estimates. Additional detail for 2023 year-to-date median rents in units in structures containing five or more housing units is available in the table below. As data are not available for all multifamily units in each county, the final column in the table specifies the number of units reflected in the median rent estimate.

**Figure VI-18.**  
**Multifamily Median Rent, Southwest Region, Counties, 2023 YTD**

Note:  
Multifamily units are defined as units in buildings of 5+ units.

Source:  
CoStar and Root Policy Research.

	Median Rent	Units Included
Lincoln	\$1,147	210
Sublette	\$525	12
Sweetwater	\$1,007	1,043
Uinta	\$796	370

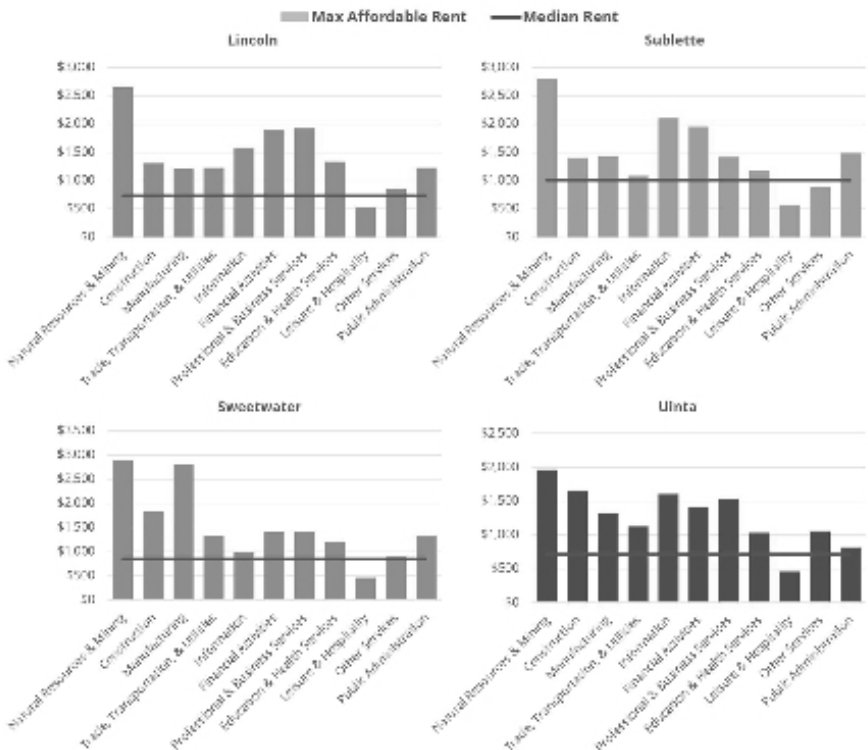
**Housing affordability by industry.** The federal government considers housing to be affordable when housing cost—the rent or mortgage payment plus taxes, utilities,

mortgage, insurance, and HOA fees—consumes 30% or less of a household's gross income. Households spending more than 30% of their gross income are cost burdened.

Figures VI-19 and VI-20 below show housing affordability for the Southwest Region's workforce by comparing median rent and median home sales prices with rental and ownership affordability thresholds for individuals earning the average annual wages of industries in each county.

As shown in Figure VI-19, median rent is affordable to individuals earning average wages for all industries in each county except for Leisure & Hospitality in all counties and Other Services in Sublette county. Notably, Leisure & Hospitality accounts for 11% of jobs in the Southwest Region, making it the fourth largest sector by employment in the region.

**Figure VI-19.**  
**Rental Affordability by Industry, Southwest Region, Counties, 2021/22**

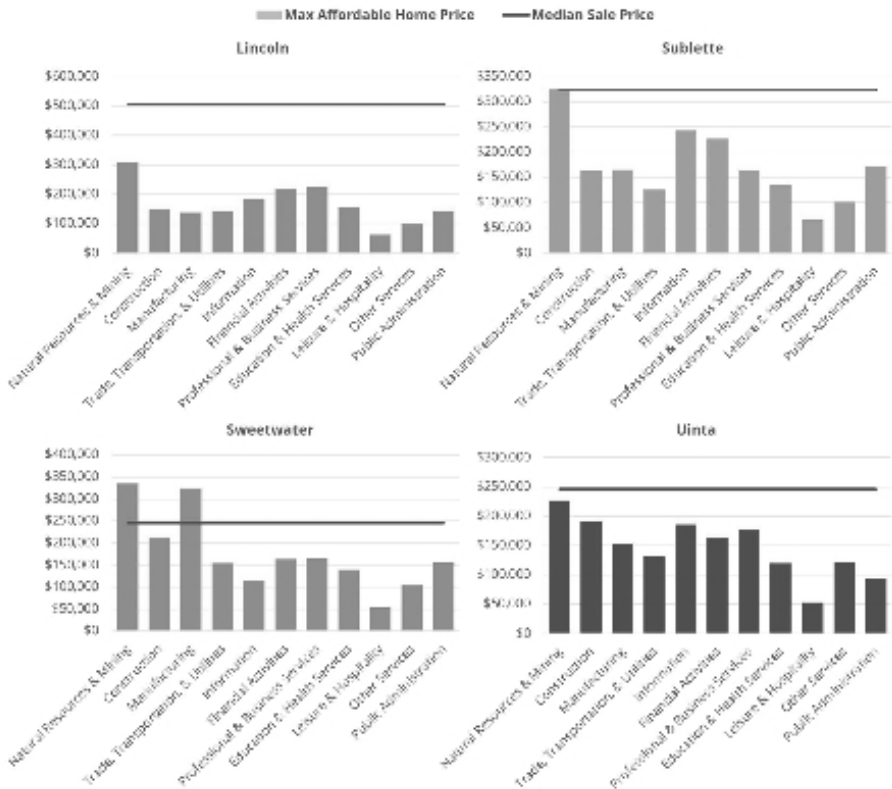


Note: Affordability estimates assume families spend no more than 30% of their income on housing. Max affordable rent estimates are based on 2022 average wage data, while median rent estimates are 2021 data.

Source: Quarterly Census of Employment and Wages, 2021 5-year ACS, and Root Policy Research.

Figure VI-20 below shows home purchase affordability by industry. Entering homeownership is significantly less affordable for each industry's workforce than renting is. Individuals earning the average wage for any industry in Lincoln and Uinta counties cannot afford to buy a home at their county's median home sales price. Average wage earners in Sublette and Sweetwater counties' Natural Resources & Mining industries and in Sweetwater county's Manufacturing industry can afford to purchase median-priced homes, but median-priced homes are unaffordable to average wage earners in all other industries in these counties. Supposing all employees earn the average wage for their industry in their county, only 13.5% of the Southwest Region's workers can afford to purchase a median-priced home in their county.

**Figure VI-20.**  
**Purchase Affordability by Industry, Southwest Region, Counties, 2022**



Note: Affordability estimates assume a household spends 30% of its income on housing and assume a 30-year mortgage with a 7% interest rate, a 10% down payment, and 30% of monthly payment to property taxes, utilities, and insurance.

Source: Quarterly Census of Employment and Wages, Assessor data by the Wyoming Department of Revenue, and Root Policy Research.

**Rental vacancy.** Figure VI-21 below shows 2023 rental vacancy rates for counties in Wyoming's Southwest Region.<sup>2</sup> As data are not available for all multifamily units in each county, the final column in the table specifies the number of units reflected in the vacancy rate estimate. According to 2023 estimates, each county in the Southwest Region has a rental vacancy rate higher than the 5% considered healthy for the rental market. Uinta county has the highest rental vacancy rate of any county in Wyoming.

**Figure VI-21.**  
**Multifamily Rental Vacancy**  
**Rate, Southwest Region,**  
**Counties, 2023 YTD**

Note:

CoStar Multifamily units are defined as units in buildings of 5+ units.

Source:

CoStar, C&P Advisors Wyoming Rental Vacancy Survey, and Root Policy Research.

	Multifamily Vacancy Rate	Units Included
Lincoln	6.5%	399
Sublette	9.0%	89
Sweetwater	6.2%	3,113
Uinta	17.9%	989

**Mortgage loan activity.** Home Mortgage Disclosure Act (HMDA) data indicate loan originations and can be analyzed to understand shifts in home purchase activity by location, home value, occupancy type, and other factors. HMDA data only include home purchases that made use of a mortgage; home purchases made in cash, without a mortgage, are not included in the data. Therefore, the following estimates undercount both the total volume of home purchases.

Figure VI-22 shows the volume of home loan originations by county in the Southwest Region from 2018 to 2022. The Southwest Region experienced a relatively low volume of home purchase loan originations in 2018 and 2019. Mortgage originations rose with low interest rates during the COVID-19 pandemic in 2020 and 2021. Mortgage originations fell below pre-pandemic levels alongside steep increases in interest rates in 2022.

In 2022, Sweetwater county accounts for the greatest share of the Southwest Region's home purchase loan originations. Its share of the Region's home purchase loan originations matches its share of the regional population at 47%. Lincoln county's population is slightly smaller than that of Uinta county, but Lincoln county accounts for a

<sup>2</sup> Vacancy data come from two sources: 1. Commercial real estate market analytics firm CoStar provides rental vacancy rates. CoStar collects data on vacancy rates for multifamily rental developments containing five or more units at the development level and aggregates these data to provide estimates at different geographic levels. 2. The Wyoming Rental Vacancy Survey (WRVS) which was undertaken on behalf of the Wyoming Community Development Authority, beginning in July 2023. The survey was designed to collect information regarding rentals throughout the State of Wyoming. Data were collected through systematic online data collection and telephone survey. In places where the coverage of this survey was higher than CoStar coverage, data from this survey were used instead.

larger share of the Region’s loan originations (24%) than Uinta county (17%). This is consistent with Lincoln county’s positive net migration. Sublette county accounts for the smallest shares of the Region’s population and loan originations.

**Figure VI-22.**  
**Home Loan**  
**Originations,**  
**Southwest**  
**Region,**  
**Counties, 2018-**  
**2022**

Note:  
Includes first lien loan  
originations only.

Source:  
HMDA and Root Policy  
Research.

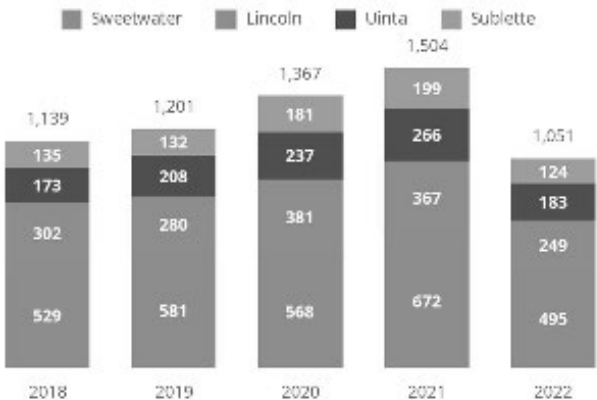


Figure VI-23 shows trends in the median home value for originated home purchase loans for each county in the Southwest Region and for Wyoming. The median home value for originated home purchase loans has increased overall since 2018 in each county of the Southwest Region. In Lincoln and Sublette counties, the median home value for originated home purchase loans is greater than that of Wyoming. Lincoln county witnessed the largest growth in median home value for originated loans.



**Figure VI-23.  
Median Home  
Value for  
Originated  
Home Purchase  
Loans,  
Southwest  
Region,  
Counties, 2018-  
2022**

Note:  
Includes first lien loan  
originations only.

Source:  
HMDA and Root Policy  
Research.

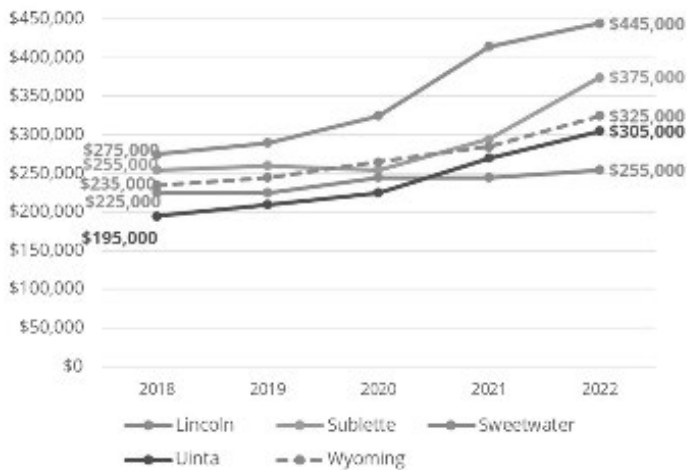


Figure VI-24 shows trends in property values for originated home purchase loans by occupancy type between 2018 and 2022. In the Southwest Region overall, second residences had the highest median value (\$335,000), followed by principal residences (\$235,000) and investment properties (\$155,000). Holding with this trend, investment properties had the lowest median values in the counties for which data are available for investment properties. In Lincoln county, principal residences had the second highest median value, while second residences had the highest median value. The median value of second residences in Lincoln county has more than doubled since 2018, and as of 2022, second residences in Lincoln county have a median value \$220,000 greater than second residences in the Region as a whole. This is explained by Lincoln county's proximity to Jackson and Grand Teton National Park, a popular tourist destination.

Median home values for each occupancy type for which data are available are higher in Lincoln county and in Sublette county than they are in the Region. Principal residences in Sweetwater county have a lower median value than principal residences in the Region, while the median value of principal residences in Uinta county matches that of the Region. Median values of principal residences in Lincoln, Sublette, and Uinta counties appreciated at a higher rate between 2018 and 2022 than principal residences in the Region, while the median value of principal residences in Sweetwater county appreciated at a slower rate than the Region's principal residences.

**Figure VI-24.**  
**Median Home Value for Originated Home Purchase Loans by Occupancy**  
**Type, Southwest Region, Counties, 2018-2022**

	Median Property Value		2018-2022 Change	
	2018	2022	Amount	Percent
<b>Lincoln</b>				
Principal residence	\$270,000	\$445,000	\$175,000	65%
Second residence	\$355,000	\$745,000	\$390,000	110%
Investment property	N/A	\$310,000	N/A	N/A
<b>Sublette</b>				
Principal residence	\$255,000	\$365,000	\$110,000	43%
Second residence	\$295,000	N/A	N/A	N/A
Investment property	N/A	N/A	N/A	N/A
<b>Sweetwater</b>				
Principal residence	\$235,000	\$265,000	\$30,000	13%
Second residence	N/A	N/A	N/A	N/A
Investment property	N/A	\$175,000	N/A	N/A
<b>Uinta</b>				
Principal residence	\$195,000	\$305,000	\$110,000	56%
Second residence	N/A	N/A	N/A	N/A
Investment property	N/A	N/A	N/A	N/A
<b>Southwest Region</b>				
Principal residence	\$235,000	\$305,000	\$70,000	30%
Second residence	\$335,000	\$525,000	\$190,000	57%
Investment property	\$155,000	\$200,000	\$45,000	29%

Note: Includes first lien loan originations only. Data are omitted for categories with fewer than 20 sales.

Source: HMDA and Root Policy Research.

Trends in home value by occupancy type for the Southwest Region are further illustrated in Figure VI-25. Between 2018 and 2022, principal residences saw by far the largest rise in median value (+\$190,000), though all types of residences increased in value at similar rates until 2021. Because just under 90% of home loan originations in the Southwest Region are for principal residences, median values for home loan originations overall are equal to median values for principal residences.

**Figure VI-25.  
Median Home  
Value by  
Occupancy Type,  
Southwest  
Region, 2018-2022**

Note:  
Includes first lien loan  
originations only.

Source:  
HMDA and Root Policy  
Research.

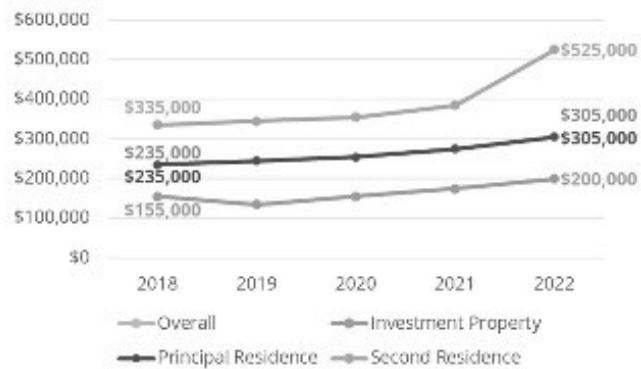
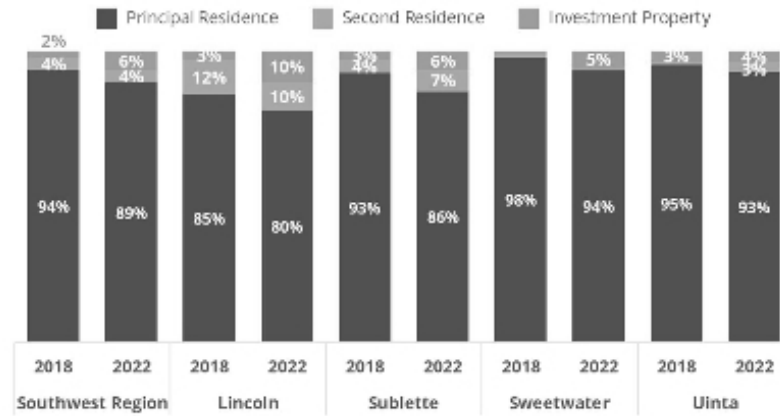


Figure VI-26 shows the composition of total loan originations by occupancy type for the Southwest Region and each of its counties between 2018 and 2022. In 2018, principal residences accounted for at least 85% of total loan originations in each county. Between 2018 and 2022, the Southwest Region saw a five percentage point decrease in the share of loan originations for principal residences, accompanied by a commensurate increase in the share of loan originations for investment properties. In 2022, principal residences account for at least 80% of total home loan originations in each county. Second residences account for the second largest shares of loan originations in Lincoln and Sublette counties, while investment properties account for the second largest shares of loan originations in Sweetwater and Uinta counties.

**Figure VI-26.**  
**Distribution of Home Purchase Loan Originations by Occupancy Type and**  
**County, 2018 and 2022**



Note: Includes first lien originations only. 1% values are not labeled.  
Source: HMDA and Root Policy Research.

**Home sales.** Assessor data from Wyoming's Department of Revenue details home sales for single-family homes on ten acres or less for each county in Wyoming. Figure VI-27 shows the median sales price for housing units sold in Wyoming's Southwest Region in 2022. The median price for all housing units in the Region was around \$276,000. Lincoln and Sublette counties had overall median sales prices above that of the Region at \$505,000 and \$323,000 respectively, while Sweetwater and Uinta counties had median sales prices below that of the Region at \$245,000 and \$246,000 respectively.

In the Southwest Region, single family homes had the highest median price of any home type at \$300,000. Modular/mobile homes and duplexes had the second and third highest median prices at \$261,000 and \$203,000 respectively. Townhomes and condos had the lowest median price at \$151,000. In all counties in the region, single family homes were more expensive at the median than all other types of homes for which data are available.

**Figure VI-27.**  
**Median Home Sales Price by Structure Type, Southwest Region, Counties, 2022**

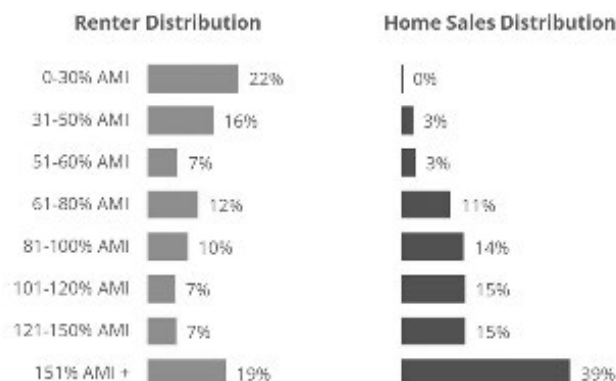
	Median Sales Price				
	All Units	Single Family	Duplex	Townhome/ Condo	Modular/ Mobile Home
Southwest	\$275,948	\$300,000	\$203,750	\$151,500	\$261,000
Lincoln	\$504,838	\$519,966	N/A	N/A	N/A
Sublette	\$323,250	\$372,000	N/A	N/A	N/A
Sweetwater	\$245,000	\$260,000	\$206,500	\$155,000	N/A
Uinta	\$246,000	\$289,900	N/A	\$147,500	\$199,500

Note: Data are omitted for categories with fewer than 20 sales.

Source: Assessor data by the Wyoming Department of Revenue.

Figure VI-28 below shows the distribution of renters and home sales by Area Median Income (AMI). The renter distribution presents the distribution of renter incomes by AMI range, while the home sales distribution presents the distribution of homes sold affordable to households with such income levels without being cost burdened. Around 38% of the Southwest Region's renters have incomes below 50% AMI, while only 3% of homes sold in the Region in 2022 were affordable to these renters. Two thirds of the Region's renters have incomes lower than 100% AMI, but only around one third of homes sold in the Region were affordable to households in this income range.

**Figure VI-28.**  
**Renter and Affordable Home Sales Distribution by AMI, Southwest Region**

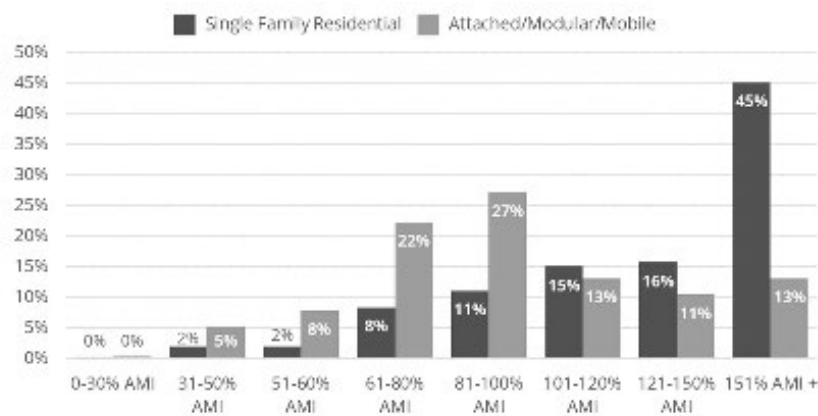


Note: Affordability estimates assume that a household spends 30% of their income on housing and assume a 30-year mortgage with a 7% interest rate, a 10% down payment, and 30% of monthly payment to property taxes, utilities, and insurance.

Source: 2021 5-year ACS, Assessor data by the Wyoming Department of Revenue, and Root Policy Research.

Figure VI-29 displays the shares of total single family homes and attached, modular, and mobile homes sold in 2022 that were affordable to buyers in each AMI range. While single family homes are concentrated in the higher affordability ranges, a far greater share of attached, modular, and mobile homes are affordable to low to moderate income households. It is important to note that the region's housing stock is dominated by single family homes, so low to moderate income buyers interested in purchasing attached, modular, or mobile homes in their price ranges face significant supply constraints.

**Figure VI-29.**  
**Home Sales Distribution by AMI and Unit Type, Southwest Region, 2022**



Note: Affordability estimates assume that a household spends 30% of their income on housing and assume a 30-year mortgage with a 7% interest rate, a 10% down payment, and 30% of monthly payment to property taxes, utilities, and insurance.

Source: Assessor data by the Wyoming Department of Revenue and Root Policy Research.

## Housing Problems

**Cost burden.** The federal government, and most housing programs, consider housing as affordable when the housing payment—the rent or mortgage payment, plus taxes and utilities—consumes 30% or less of a household's gross income. Households who pay more than 30% are "cost burdened." This standard is derived from historically typical mortgage lending requirements and is also applied to renters.

Households experiencing cost burden have less money to spend on other essentials like healthcare, education, groceries, and transportation—adversely affecting their household well-being, limiting their economic growth potential, and constraining local spending.

Figure VI-30 shows the shares of renters and owners in Wyoming, the Southwest Region, and each Southwest Region county who experienced cost burden in 2010 and 2021. For

each year studied in each area studied, renters face cost burden at higher rates than homeowners do.

Between 2010 and 2021, the share of Wyoming renters experiencing cost burden rose by six percentage points from 32% to 38%, while the share of Wyoming homeowners experiencing cost burden decreased by two percentage points from 20% to 18%. At the same time, the share of Southwest Region renters experiencing cost burden increased by four percentage points from 24% to 28%, while the share of the Region’s homeowners experiencing cost burden decreased by two percentage points. Renters and owners in the Southwest Region experience cost burden at lower rates than renters and owners in Wyoming.

As of 2021, renters in Uinta county experience cost burden at the lowest rate for renters in the region (17%), while renters in Sweetwater county experience the highest rate of cost burden for renters in the region (32%). Homeowners in Uinta county have the lowest rate of cost burden for homeowners in the region (12%), while homeowners in Lincoln county have the highest rate of cost burden in the region (18%).

**Figure VI-30.**  
**Cost Burden by Tenure,**  
**Wyoming, Southwest**  
**Region, Counties, 2010**  
**and 2021**

Source:  
2010 and 2021 5-year ACS estimates and Root  
Policy Research.



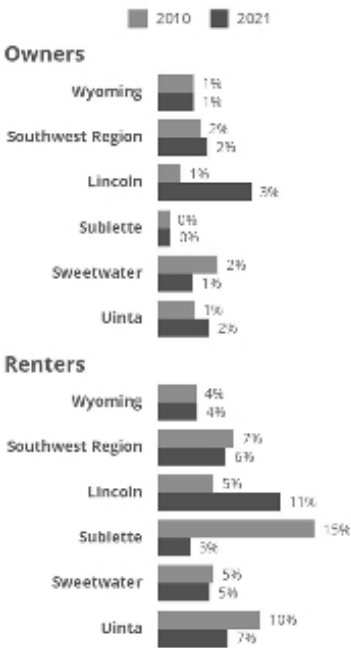
**Overcrowding.** Housing units are considered overcrowded when they are occupied by more than one person per room. Figure IV-31 illustrates the rate of overcrowding by tenure for Wyoming, the Southwest Region, and the counties of the Southwest Region.

Overcrowding has been stable overall for Wyoming’s owner and renter households between 2010 and 2021. Over the same time, overcrowding in the Southwest Region has increased by less than one percentage point for owner households and decreased by one percentage point for renter households. Over the time studied, overcrowding increased for owners in Lincoln and Uinta counties, as well as for renters in Lincoln county.

Renter households experience overcrowding at four times the rate of owner households in Wyoming and at greater rates than owner households in the Southwest Region and each of its counties.

**Figure VI-31.**  
**Overcrowding by Tenure,**  
**Wyoming, Southwest**  
**Region, Counties, 2010 and**  
**2021**

Source:  
ACS 2021 5-year estimates and Root Policy  
Research.



**Short Term Rental Market**

Short-terms rentals, or STRs, play a unique role within housing markets, especially those with a large tourism industry, as they can provide economic benefit (to homeowners through rental revenue and the City through sales tax/tourism revenue) but may disrupt the long-term rental market if they account for a substantial portion of the total housing stock.

**Pinedale, Sublette County.** According to data from AirDNA (a market analytics website for short term rentals), there are 144 homes listed as short-term rentals (STRs) in



Sublette county, 74 of which are in Pinedale<sup>3</sup>. Pinedale's STRs, which may be active or inactive at the time of reporting, account for less than 3% of its total housing stock<sup>4</sup>. Figure VI-32 below maps the volume of STRs in Sublette county's ZIP codes.

**Figure VI-32.**  
**Short Term Rental**  
**Units by ZIP Code,**  
**Sublette County**  
**and Pinedale, 2023**

Note:  
Sublette county as presented in this section consists of the following ZIP Codes: 82941, 83113, 82923, 82925, 83115, and 82922.

Pinedale is defined as the ZIP Code 82941.

This map uses ZIP Code Tabulation Areas (ZCTAs) from the U.S. Census Bureau to approximate ZIP Code boundaries. ZCTAs do not exist for uninhabited areas or areas with very few addresses. ZIP Codes without corresponding ZCTAs have not been mapped.

Source:  
AirDNA.com

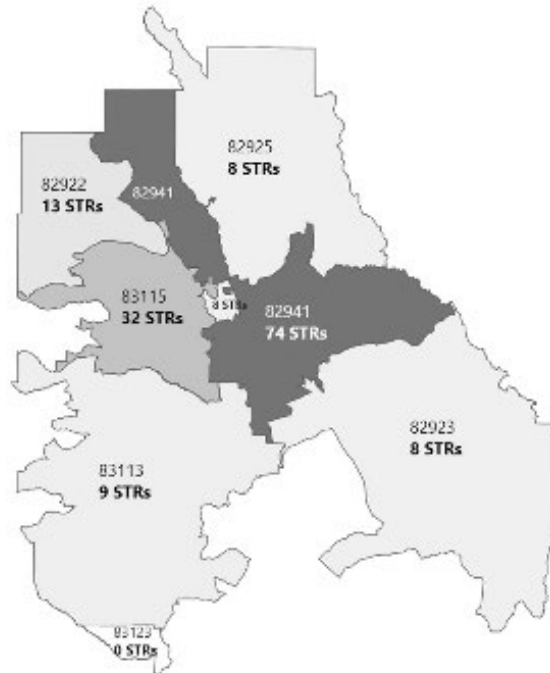


Figure VI-33 demonstrates the change in the number of active STRs in Sublette county in November of each year, 2020-2023. Note that STR activity is seasonal, with higher activity typically observed in the summer months.

<sup>3</sup> AirDNA.com provides market analytics of short term rentals (STRs) by ZIP Code. Sublette county as presented in this section consists of the following ZIP Codes: 82941, 83113, 82923, 82925, 83115, and 82922. The town of Pinedale is represented by its main ZIP Code, 82941.

<sup>4</sup> According to 2022 5-year ACS estimates, there are 2,558 total housing units in the 82941 ZIP Code Tabulation Area.

**Figure VI-33.**  
Active Short Term  
Rental Units,  
Sublette County,  
2020-2023

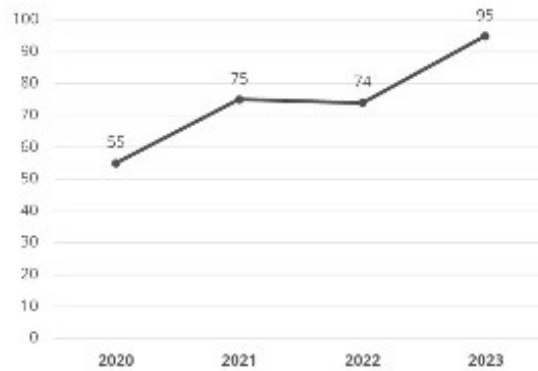
Note:

Counts reflect units available in  
November of each year.

Sublette county as presented in this  
section consists of the following ZIP  
Codes: 82941, 83113, 82923, 82925,  
83115, and 82922.

Source:

AirDNA.com



As shown in Figure VI-34, 59% of short term rentals in Sublette county are available for fewer than 180 nights per year. These are considered part-time STRs, some of which may be permanently occupied and rented occasionally, and others of which may be rented consistently and otherwise vacant or used seasonally. Coupled with the fact that STRs, active and inactive, account for less than 3% of the total housing stock in Pinedale, this indicates that STRs likely do not affect the supply of housing in Sublette county.

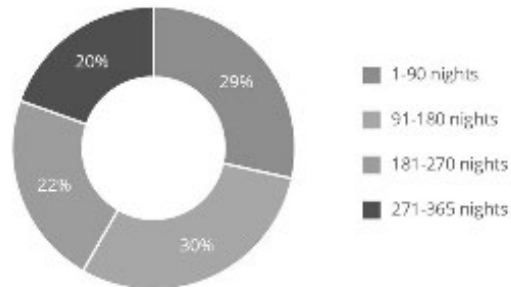
**Figure VI-34.**  
Short Term Rental  
Units by Annual  
Availability,  
Sublette County,  
2023

Note:

Sublette county as presented in this  
section consists of the following ZIP  
Codes: 82941, 83113, 82923, 82925,  
83115, and 82922.

Source:

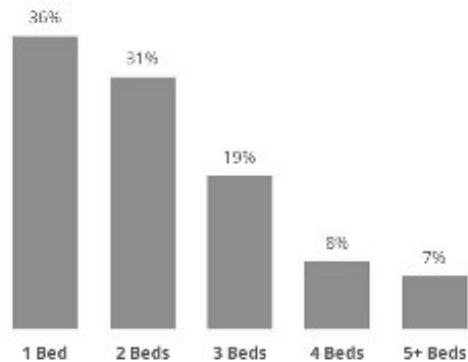
AirDNA.com



According to AirDNA, 90% of STRs in Sublette county are entire homes, 9% are private rooms, and 1% are shared rooms. Figure VI-35 below shows the distribution of STRs by number of bedrooms. 36% of STRs in the county have 1 bedroom, 31% have 2 bedrooms, 19% have 3 bedrooms, 8% have 4 bedrooms, and 7% have 5 or more bedrooms.

**Figure VI-35.**  
**Short Term Rental**  
**Units by Number of**  
**Bedrooms, Sublette**  
**County, 2023**

Note:  
 Sublette county as presented in this section consists of the following ZIP Codes: 82941, 83113, 82923, 82925, 83115, and 82922.  
 Source:  
 AirDNA.com



## Housing Needs Projections

This section estimates the number of housing units needed to accommodate household growth through 2030, using population projections prepared by the Wyoming Economic Analysis Division.

Figure VI-36 shows two estimates of the number of housing units each county in the Southwest Region needs to add to accommodate household growth and replace the loss in the housing stock. The first estimate assumes a housing loss of 0.24% every two years, and the second estimate assumes a housing loss of 1.7% every two years.<sup>5</sup> Estimates are shown as totals and by AMI, based on the state's AMI distribution provided by recent data from HUD's Comprehensive Housing Affordability Strategy (CHAS).

The estimates indicate that by 2030, between 1,011 and 2,270 total housing units will be needed to accommodate Sweetwater county households, between 969 and 1,588 units will be needed to accommodate Lincoln county households, and between 763 and 1,107 units will be needed to accommodate Sublette county households. Uinta county must add between 434 and 1,103 housing units by 2030 to accommodate its 2030 population.

<sup>5</sup> According to the last Components of Inventory Change Report produced by HUD in 2017, which used American Housing Survey data, it was estimated that between 2015 and 2017, about 0.24% of the national housing stock was lost through demolitions or disasters alone. According to a Brookings Institute report, the two-year housing loss over the period 1985-2013 was 1.7% in the West region of the country (<https://www.brookings.edu/articles/unpacking-the-housing-shortage-puzzle/#:~:text=Churn%20is%20the%20sum%20of,built%20homes%20and%20no%20demolitions>).

**Figure VI-36.**  
**Projected Housing Units Needed Between 2021 and 2030 by Tenure and**  
**AMI, Southwest Region, Counties**

	Renters		Homeowners		Total	
	Estimate 1	Estimate 2	Estimate 1	Estimate 2	Estimate 1	Estimate 2
<b>Lincoln</b>	<b>191</b>	<b>312</b>	<b>779</b>	<b>1,277</b>	<b>969</b>	<b>1,588</b>
0%-30% AMI	27	44	40	65	67	109
31%-50% AMI	40	65	79	130	119	195
51%-80% AMI	61	101	115	189	177	290
81%-100% AMI	20	32	103	169	123	201
100% + AMI	43	70	442	725	485	795
<b>Sublette</b>	<b>130</b>	<b>188</b>	<b>634</b>	<b>920</b>	<b>763</b>	<b>1,107</b>
0%-30% AMI	29	42	41	60	70	102
31%-50% AMI	14	20	106	154	120	174
51%-80% AMI	18	27	36	52	54	79
81%-100% AMI	11	16	82	119	93	135
100% + AMI	57	83	369	535	426	619
<b>Sweetwater</b>	<b>249</b>	<b>559</b>	<b>762</b>	<b>1,711</b>	<b>1,011</b>	<b>2,270</b>
0%-30% AMI	59	132	72	161	131	293
31%-50% AMI	38	84	71	159	108	243
51%-80% AMI	59	131	109	244	167	375
81%-100% AMI	24	55	79	178	104	232
100% + AMI	70	157	432	970	502	1,127
<b>Uinta</b>	<b>100</b>	<b>233</b>	<b>334</b>	<b>779</b>	<b>434</b>	<b>1,013</b>
0%-30% AMI	18	41	16	38	34	79
31%-50% AMI	20	46	35	81	55	127
51%-80% AMI	26	60	55	128	81	188
81%-100% AMI	8	18	40	93	48	111
100% + AMI	29	68	188	439	217	507

Note: Holds latest CHAS tenure and income distribution constant.

Source: HUD CHAS 2020 estimates, American Housing Survey, and Root Policy Research.

## Appendix

The following tables show AMI limits by county, examples of establishment types by industry, and federal poverty thresholds by household size.

**Figure VI-37.**  
**AMI Limits,**  
**Southwest Region,**  
**Counties, 2021**

Source:  
U.S. Department of Housing and  
Urban Development.

2021 2-person AMI	Lincoln	Sublette	Sweetwater	Uinta
30% AMI	\$19,920	\$22,410	\$21,300	\$19,440
50% AMI	\$33,200	\$37,350	\$35,500	\$32,400
80% AMI	\$26,560	\$29,880	\$28,400	\$25,920
100% AMI	\$66,400	\$74,700	\$71,000	\$64,800
120% AMI	\$79,680	\$89,640	\$85,200	\$77,760

**Figure VI-38.**  
**AMI Limits,**  
**Southwest Region,**  
**Counties, 2022**

Source:  
U.S. Department of Housing and  
Urban Development.

2022 2-person AMI	Lincoln	Sublette	Sweetwater	Uinta
30% AMI	\$21,840	\$21,750	\$23,460	\$21,030
50% AMI	\$36,400	\$36,250	\$39,100	\$35,050
80% AMI	\$29,120	\$29,000	\$31,280	\$28,040
100% AMI	\$72,800	\$72,500	\$78,200	\$70,100
120% AMI	\$87,360	\$87,000	\$93,840	\$84,120

**Figure VI-39.**  
**QCEW Establishment Examples by Industry**

Establishment Examples	
<b>Goods Producing</b>	
<b>Natural Resources &amp; Mining</b>	Farms, ranches, dairies, greenhouses, nurseries, orchards, hatcheries, mine operation and mining support activities.
<b>Construction</b>	General contractors, design-builders, construction managers, turnkey contractors.
<b>Manufacturing</b>	Plants, factories, mills.
<b>Service Providing</b>	
<b>Trade, Transportation, &amp; Utilities</b>	Wholesale merchants, distributors, shippers, import/export merchants, office supply retailers, computer and software retailers, building materials dealers, plumbing supply retailers, electrical supply retailers, electric power, natural gas, steam supply, water supply, and sewage removal.
<b>Information</b>	Software publishing, broadcasting and content providers, telecommunications, computing infrastructure providers, data processing, Web hosting.
<b>Financial Activities</b>	Commercial banks, credit unions, rental and leasing services.
<b>Professional &amp; Business Services</b>	Legal advice and representation, accounting, bookkeeping, payroll services, architectural, engineering, consulting services.
<b>Education &amp; Health Services</b>	Schools, colleges, universities, hospitals, nursing care facilities.
<b>Leisure &amp; Hospitality</b>	Hotels, restaurants, gambling establishments.
<b>Other Services</b>	Equipment and machinery repairing, grantmaking, advocacy, and providing drycleaning and laundry services, personal care services.
<b>Public Administration</b>	Federal, state, and local government agencies.

Source: BLS Quarterly Census of Employment and Wages.

**Figure VI-40.**  
**Federal Poverty Thresholds by Household Size, 2010**

Size of Family Unit	Weighted Average Thresholds	Related Children Under 18 Years								
		None	One	Two	Three	Four	Five	Six	Seven	Eight or More
One person (unrelated individual)	\$11,139									
Under 65 years	\$11,344	\$11,344								
65 years and over	\$10,458	\$10,458								
Two people	\$14,218									
Householder under 65 years	\$14,676	\$14,602	\$15,030							
Householder 65 years and over	\$13,194	\$13,180	\$14,973							
Three people	\$17,374	\$17,057	\$17,552	\$17,568						
Four people	\$22,314	\$22,491	\$22,859	\$22,113	\$22,190					
Five people	\$26,439	\$27,123	\$27,518	\$26,675	\$26,023	\$25,625				
Six people	\$29,897	\$31,197	\$31,320	\$30,675	\$30,056	\$29,137	\$28,591			
Seven people	\$34,009	\$35,896	\$36,120	\$35,347	\$34,809	\$33,805	\$32,635	\$31,351		
Eight people	\$37,934	\$40,146	\$40,501	\$39,772	\$39,133	\$38,227	\$37,076	\$35,879	\$35,575	
Nine people or more	\$45,220	\$48,293	\$48,527	\$47,882	\$47,340	\$46,451	\$45,227	\$44,120	\$43,845	\$42,156

Source: U.S. Census Bureau.

**Figure VI-41.**  
**Federal Poverty Thresholds by Household Size, 2021**

Size of Family Unit	Weighted Average Thresholds	Related Children Under 18 Years								
		None	One	Two	Three	Four	Five	Six	Seven	Eight or More
One person (unrelated individual)	\$13,788									
Under 65 years	\$14,097	\$14,097								
65 years and over	\$12,996	\$12,996								
Two people	\$17,529									
Householder under 65 years	\$18,231	\$18,145	\$18,677							
Householder 65 years and over	\$16,400	\$16,379	\$18,606							
Three people	\$21,559	\$21,196	\$21,811	\$21,831						
Four people	\$27,740	\$27,949	\$28,406	\$27,479	\$27,575					
Five people	\$32,865	\$33,705	\$34,195	\$33,148	\$32,338	\$31,843				
Six people	\$37,161	\$38,767	\$38,921	\$38,119	\$37,350	\$36,207	\$35,529			
Seven people	\$42,156	\$44,606	\$44,885	\$43,925	\$43,255	\$42,009	\$40,554	\$38,958		
Eight people	\$47,093	\$49,888	\$50,329	\$49,423	\$48,629	\$47,503	\$46,073	\$44,585	\$44,207	
Nine people or more	\$56,325	\$60,012	\$60,303	\$59,501	\$58,828	\$57,722	\$56,201	\$54,826	\$54,485	\$52,386

Source: U.S. Census Bureau.



## SECTION VII.

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### TETON REGION

## SECTION VII. Teton Region

This regional summary provides demographic, economic, and housing market data for the Teton Region. Wyoming's Teton Region is comprised of Teton county. Teton county includes all of Grand Teton National Park, much of the territory of Yellowstone National Park, and the city of Jackson. Because the Teton Region encompasses only Teton county, Teton county is referred to as the Teton Region in this regional summary.

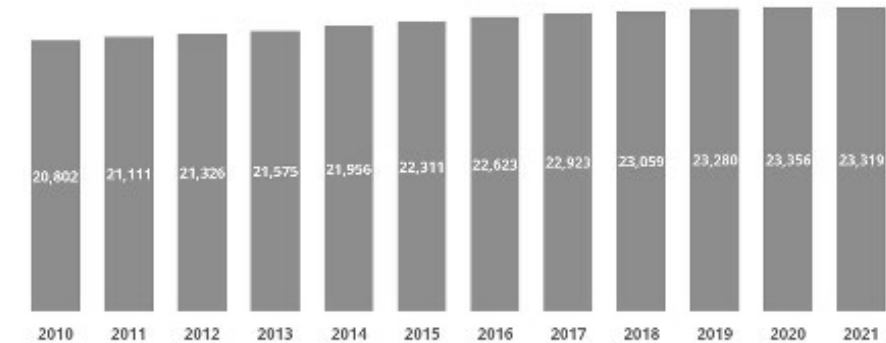
### Teton Region



### Demographic Trends

**Population growth.** The population of Wyoming's Teton Region grew by around 2,500 residents or 12% between 2010 and 2021, as the State of Wyoming's population grew by around 5.7%. As shown in Figure VII-1, the Teton Region's population grew each year from 2011 to 2021, increasing from 20,802 residents in 2010 to 23,356 residents in 2020. The Region's population decreased by less than 0.5% between 2020 and 2021. In 2021, the Teton Region had a population of 23,319 residents. At the same time, the State of Wyoming's population grew each year from 2010 to 2017 and has modestly decreased since.

Figure VII-1.  
Population, Teton Region, 2010-2021

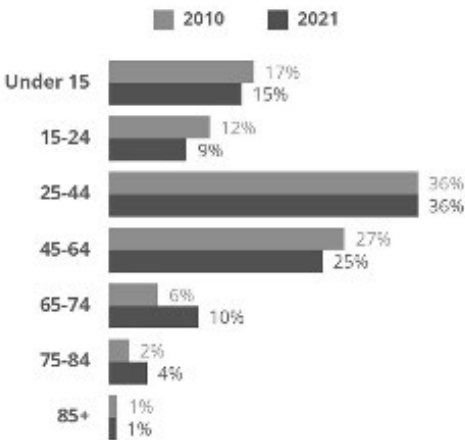


Source: 2010-2021 5-year ACS and Root Policy Research.

**Age distribution.** Figure VII-2 shows the age distribution of residents in the Teton Region for 2010 and 2021. Between 2010 and 2021, the Teton Region's share of residents aged 65 and older increased by around six percentage points from 9% to 15%. At the same time, the Region's share of residents aged 25-64 decreased from 63% to 60%. The Teton Region's growing senior population underscores the importance of aging-friendly housing options moving forward, while the Region's shrinking share of working-aged individuals raises concerns about a shrinking workforce.

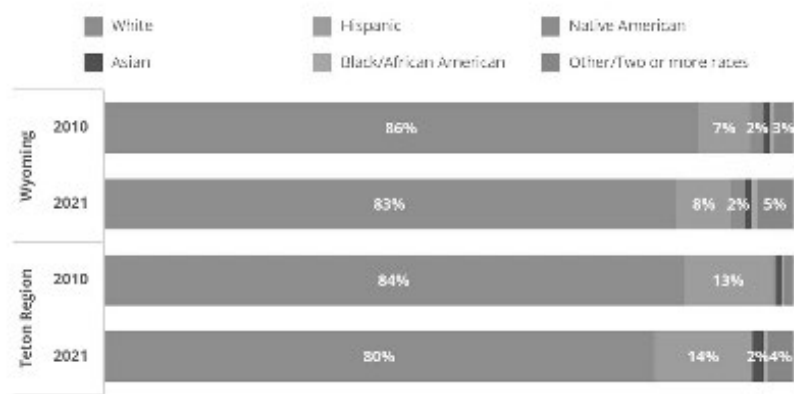
Figure VII-2.  
Age Distribution, Teton  
Region, 2010 and 2021

Source:  
2010 and 2021 5-year ACS and Root Policy Research.



**Racial and ethnic distribution.** Figure VII-3 shows the racial and ethnic distributions of the populations of Wyoming and Wyoming's Teton Region. Compared to the state, a much larger share of the population identifies as Hispanic in the Teton Region (14% v. 8% in 2022) and a smaller share identify as non-Hispanic White (80% v. 83% in 2022). The Teton Region's population has smaller shares of residents identifying as Native American and Other/Two or more races than Wyoming's population does, while the Teton Region's population has a larger share of Asian residents than Wyoming's does.

**Figure VII-3.**  
**Race and Ethnicity, Wyoming and Teton Region, 2010 and 2021**

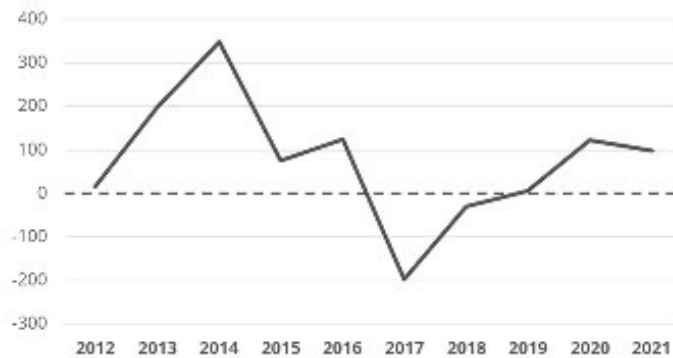


Note: The categories White, Native American, Asian, Black/African American, and Other/Two or more races include only non-Hispanic. The Hispanic category refers to Hispanics of any race. 0% and 1% labels are not shown.  
Source: 2010 and 2021 5-year ACS and Root Policy Research.

**Migration.** Figure VII-4 shows net migration data based on year-to-year address changes reported on individual income tax returns filed with the IRS for Wyoming's Teton Region from 2012 to 2021. Net migration in the Teton Region was positive from 2012 to 2016, negative in 2017 and 2018, and positive from 2019 to 2021.

**Figure VII-4.  
Net Migration,  
Teton Region,  
2012-2021**

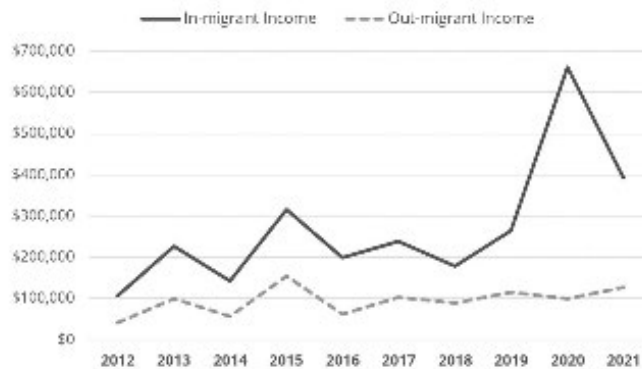
Source:  
Internal Revenue Service and  
Root Policy Research.



IRS data also provide the total adjusted gross income, which allows the estimation of the average adjusted gross income<sup>1</sup> for inflow and outflow returns each year. Figure VII-5 shows the difference between the average income of in-migrants and the average income of out-migrants for each county in the Teton Region from 2012 to 2021 to identify migration-driven trends in income. The average income for in-migrants to the Teton Region is higher than the average income for out-migrants from the Teton Region and this income difference was more pronounced during the pandemic. It should be noted that these are averages and can be skewed by a small number of very high income households.

**Figure VII-5.  
Average Income  
of In-migrants  
and Out-migrants,  
Teton Region,  
2012-2021**

Source:  
Internal Revenue Service and  
Root Policy Research.



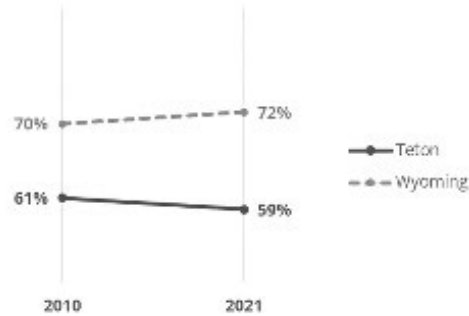
**Homeownership.** Homeownership rates for the Teton Region are shown in Figure VII-6. Between 2010 and 2021, Wyoming's homeownership rate rose slightly, while the Teton

<sup>1</sup> Adjusted Gross Income (AGI) is defined as gross income minus adjustments to income. Gross income includes your wages, dividends, capital gains, business income, retirement distributions as well as other income. Adjustments to income include such items as Educator expenses, Student loan interest, Alimony payments or contributions to a retirement account.

Region's homeownership rate declined. In 2021, the Teton Region had a homeownership rate of 59%, 13 percentage points lower than the state's. Teton's homeownership rate is the second lowest homeownership rate in the state of Wyoming.

**Figure VII-6.**  
**Homeownership Rates, Teton**  
**Region, 2010 and 2021**

Source:  
2010 and 2021 5-year ACS and Root Policy Research.



**Income and poverty.** Figure VII-7 shows median income for homeowners and renters in Wyoming's Teton Region. As of 2021, Teton Region has the highest median incomes for both owners and renters in the state. Key trends in median income by tenure include:

- In 2021, median renter income in the Teton Region is about 60% of median owner income. Median renter income remained relatively stable as a share of owner income since 2010.
- Between 2010 and 2021, Teton Region renters saw their median income increase by about a third of its 2010 value. Homeowners in the Teton Region saw their median income increase by just over a quarter of its 2010 value.
- The percentage increase in incomes for the Teton Region's homeowners matched that for homeowners in the state, while the growth in incomes for the Teton Region's renters outpaced that of renters in the state.

**Figure VII-7.**  
**Median Income by**  
**Tenure, Teton Region,**  
**2010 and 2021**

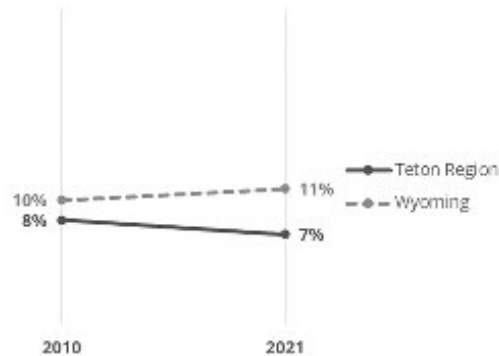
Source:  
2010 and 2021 5-year ACS and Root Policy  
Research.

	Median Income		2010-2021 Change	
	2010	2021	Amount	Percent
<b>Teton Region</b>				
<b>Owner</b>	\$93,698	\$119,375	\$25,677	27%
<b>Renter</b>	\$54,304	\$71,445	\$17,141	32%
<b>Wyoming</b>				
<b>Owner</b>	\$64,489	\$81,875	\$17,386	27%
<b>Renter</b>	\$33,550	\$39,506	\$5,956	18%

The Teton Region's 2010 and 2021 poverty rates are presented in Figure VII-8. The Region saw its poverty rate decrease by one percentage point between 2010 and 2021. In both years studied, the Region's poverty rate was lower than that of Wyoming. In 2021, the Teton Region had one of the lowest poverty rates in the state at 7%.

**Figure VII-8.**  
**Poverty Rate, Teton Region,**  
**2010 and 2021**

Source:  
2010 and 2021 5-year ACS and Root Policy Research.

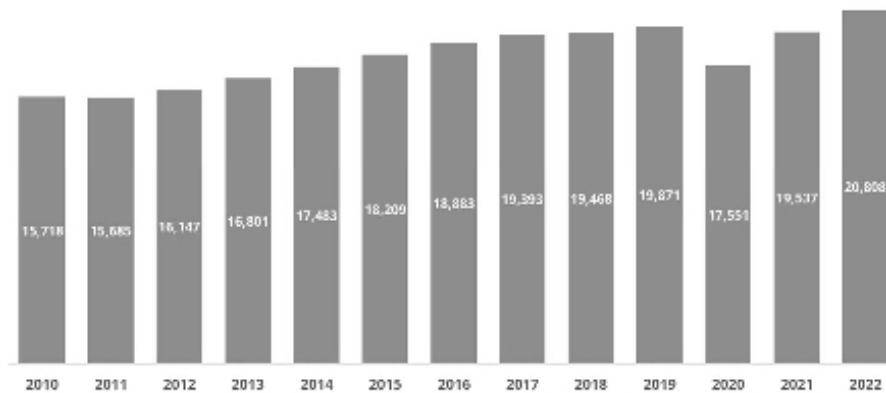


## Economic Trends

**Employment.** Total employment in the Teton Region increased by 32% overall between 2010 and 2022, far outpacing population growth in the Region. This is driven by the prohibitively high costs of living in the Teton Region.

As shown in Figure VII-9 below, the Region's employment decreased slightly between 2010 and 2011, but employment grew each year beginning in 2012 and peaked at 19,871 jobs in 2019. The pandemic prompted a loss of 2,320 jobs between 2019 and 2020. Following 2020, total employment in the Teton Region recovered quickly and surpassed pre-pandemic levels in 2022, when there were 20,808 jobs in the Teton Region.

**Figure VII-9.**  
**Total Employment, Teton Region, 2010 to 2022**



Source: Quarterly Census of Employment and Wages and Root Policy Research.

Figure VII-10 provides an industry-level breakdown of total employment. In 2022 as in 2010, the three largest industries by employment in the Region are Leisure & Hospitality (8,367 jobs, or 40% of total employment), Trade, Transportation, & Utilities (2,769 jobs), and Construction (2,647 jobs). Employment in all industries except Public Administration increased over the time studied. Public Administration's employment decreased by less than 0.5%. Leisure & Hospitality added the most jobs since 2010 (+1,499 jobs), followed by Construction (+1,060 jobs, a 67% increase over its 2010 employment).



**Figure VII-10.**  
**Employment by Industry, Teton Region, 2010 and 2022**

Teton Region	Total Employment		2010-2022 Change	
	2010	2022	Amount	Percent
Goods Producing	1,793	2,943	1,150	64%
Natural Resources & Mining	65	90	25	38%
Construction	1,587	2,647	1,060	67%
Manufacturing	141	206	65	46%
Service Providing	13,925	17,865	3,940	28%
Trade, Transportation, & Utilities	2,306	2,769	463	20%
Information	214	231	17	8%
Financial Activities	784	1,420	636	81%
Professional & Business Services	1,538	2,462	924	60%
Education & Health Services	955	1,287	332	35%
Leisure & Hospitality	6,868	8,367	1,499	22%
Other Services	536	608	72	13%
Public Administration	724	721	-3	0%
All Industries	15,718	20,808	5,090	32%

Source: Quarterly Census of Employment and Wages and Root Policy Research.

**Wages.** Figure VII-11 shows average annual wages by industry in the Teton Region. Between 2010 and 2022, average annual wages grew for each industry where complete data are available. As of 2022, Financial Activities has the highest average annual wages of any industry in the Region at \$175,000. Average wage earners in the Professional & Business Services and Information industries also make above \$150,000 annually. Wages for all other industries in the Region are below \$80,000 annually. The Region's lowest paying industry is Leisure & Hospitality, which accounts for 40% of regional employment.

**Figure VII-11.  
Average Annual  
Wages by Industry,  
Teton Region, 2010  
and 2022**

Source:  
Quarterly Census of Employment  
and Wages and Root Policy  
Research.



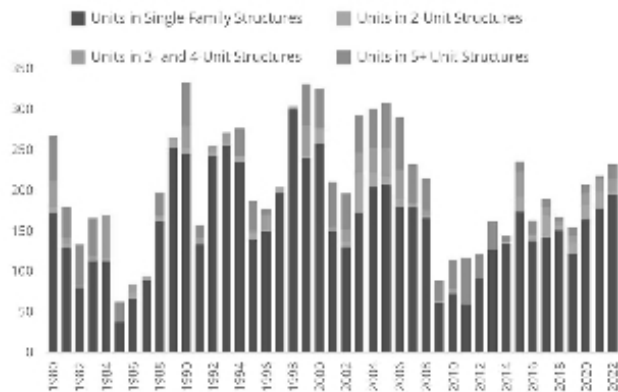
## Housing Market Trends

**Residential building permits.** In total, 8,800 residential building permits have been issued in the Teton Region since 1980. Around 77% of units permitted in the Teton Region since 1980 are units in single-family structures and around 13% are units in multifamily structures of 5 units or more. Units in 2-unit structures account for 4% of units permitted, and units in 3- and 4-unit structures account for 6% of units permitted.

Figure VII-12 below shows trends in residential building permits for the Teton Region since 1980. An average of around 180 building permits were issued each year from 1980 to 1984. The 1980s recession brought with it a drop in building permits, but permitting recovered and surpassed pre-recession levels in the late 1980s and early 1990s. An average of 260 permits were issued each year from the early 1990s to 2008. The 2008 recession brought with it another steep drop in permits. Permitting gradually recovered during the 2010s but has not reached pre-recession levels as of 2022.

**Figure VII-12.**  
**Building Permits**  
**by Units in**  
**Structure, Teton**  
**Region, 1980-2022**

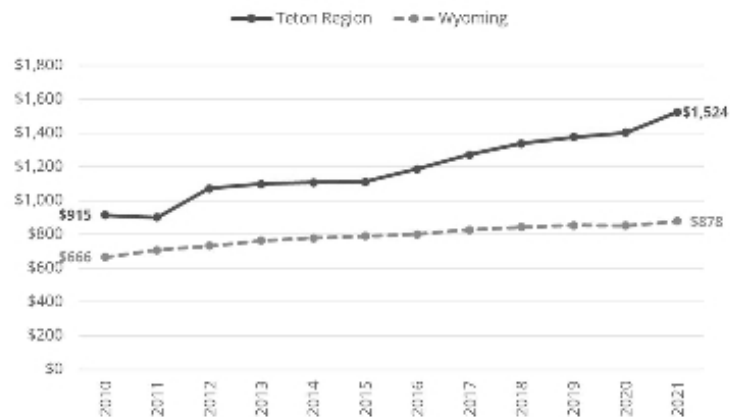
Source:  
U.S. Census Building Permits  
Survey and Root Policy Research.



**Median rent.** Figure VII-13 shows trends in median gross rent for the state of Wyoming and the Teton Region. Both areas experienced a growth in median gross rents between 2010 and 2021, and the Teton Region's median gross rent was higher than that of Wyoming for each year studied. In 2021, Teton's median gross rent (\$1,524) was at least \$500 higher than in any other county in the state.

**Figure VII-13.**  
**Median Gross**  
**Rent,**  
**Wyoming and**  
**Teton Region,**  
**2010-2021**

Source:  
2010-2021 5-year ACS and  
Root Policy Research.



The median rent data shown above reflects rents for all rental units in the Region until 2021 according to ACS estimates. CoStar provides 2023 year-to-date data for median rents in units in structures containing five or more housing units. According to CoStar, the Teton region's 2023 year-to-date median rent is \$3,116<sup>2</sup>.

<sup>2</sup> Estimate is based on rent data for 640 units.

**Housing affordability by industry.** The federal government considers housing to be affordable when housing cost—the rent or mortgage payment plus taxes, utilities, mortgage, insurance, and HOA fees—consumes 30% or less of a household's gross income. Households spending more than 30% of their gross income are cost burdened.

Figures VII-14 and VII-15 below show housing affordability for the Teton Region's workforce by comparing median rent and median home sales prices with rental and ownership affordability thresholds for individuals earning the average annual wages of industries in each county.

As shown in Figure VII-14, median rent is affordable to individuals earning average wages in Natural Resources & Mining, Construction, Information, Financial Activities, Professional & Business Services, and Public Administration. Altogether, supposing that all individuals in the Teton Region's workforce earn average wages for their industries, only 36% of the workforce can afford to pay median rent.

**Figure VII-14.**  
**Rental**  
**Affordability by**  
**Industry, Teton**  
**Region, 2021/22**

Note:  
Affordability estimates assume families spend no more than 30% of their income on housing. Max affordable rent estimates are based on 2022 average wage data, while median rent estimates are based on 2021 data.

Source:  
Quarterly Census of Employment and Wages, 2021 5-year ACS, and Root Policy Research.

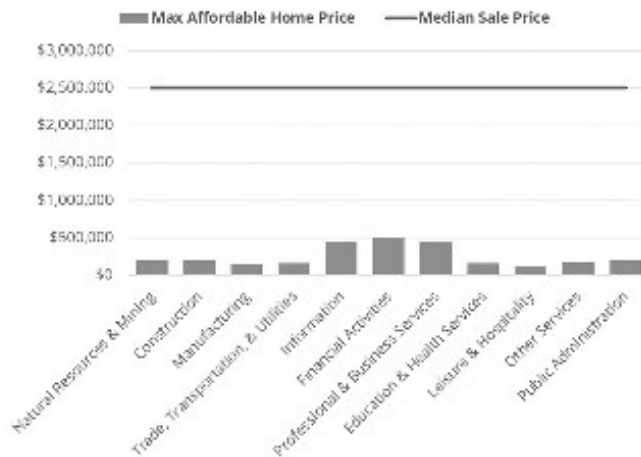


Figure VII-15 below shows home purchase affordability by industry. While renting a median-priced unit is unaffordable to the majority of the Teton Region's workforce, even fewer residents can afford to purchase a median-priced home. Median-priced homes are unaffordable to average wage earners in every industry in the Teton Region. Individuals working in Financial Activities, the industry with the highest average annual wages, would need to earn close to five times more than the average annual wages in their industry to afford to buy a median priced home. Leisure & Hospitality workers, who make up 40% of the Teton Region's workforce, would need to earn 20 times more than the average annual wages in their industry to afford to buy a median priced home.

**Figure VII-15.  
Purchase  
Affordability by  
Industry, Teton  
Region, 2022**

**Note:**  
Affordability estimates assume a household spends 30% of its income on housing and assume a 30-year mortgage with a 7% interest rate, a 10% down payment, and 30% of monthly payment to property taxes, utilities, and insurance.

**Source:**  
Quarterly Census of Employment and Wages, Assessor data by the Wyoming Department of Revenue, and Root Policy Research.



**Rental vacancy.** Real estate market analytics provider CoStar estimates that Teton county had a rental vacancy rate of 0.4%<sup>3</sup> in 2023. This data reflects rental housing units in structures of five or more units. Compared to the 5% rate that is considered healthy for the rental market, Teton county's rental vacancy rate is significantly lower, and is one of the lowest among all counties in Wyoming, along with Park county.

**Mortgage loan activity.** Home Mortgage Disclosure Act (HMDA) data indicate loan originations and can be analyzed to better understand shifts in home purchase activity by location, home value, occupancy type, and other factors. HMDA data only include home purchases that made use of a mortgage; home purchases made in cash, without a mortgage, are not included in the data. Therefore, the following estimates undercount the total volume of home purchases.

Figure VII-16 shows the volume of home loan originations in the Teton Region from 2018 to 2022. Mortgage originations rose with low interest rates during the COVID-19 pandemic in 2020 and 2021. Mortgage originations fell below pre-pandemic levels alongside steep increases in interest rates in 2022.

<sup>3</sup> Estimate is based on CoStar data for 861 units.

**Figure VII-16.**  
**Home Loan Originations, Teton**  
**Region, 2018-2022**

Note:  
Includes first lien loan originations only.

Source:  
HMDA and Root Policy Research.

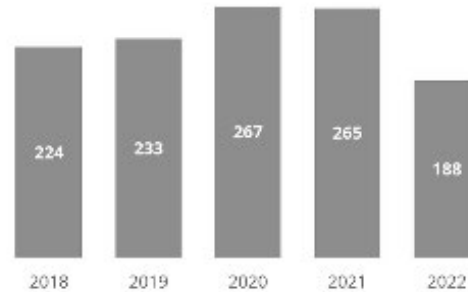


Figure VII-17 shows trends in the median home value for originated home purchase loans in the Teton Region and in Wyoming. For all years 2018-2022, the median home value for originated home purchase loans is much higher in the Teton Region than in Wyoming. In 2022, the Teton Region's median home value for originated loans was \$1,870,000, 220% of its 2018 value. At the same time, Wyoming's median home value for originated loans is \$325,000, 138% of its 2018 value.

**Figure VII-17.**  
**Median Home**  
**Value for**  
**Originated Home**  
**Purchase Loans,**  
**Teton Region,**  
**2018-2022**

Note:  
Includes first lien loan  
originations only.

Source:  
HMDA and Root Policy Research.

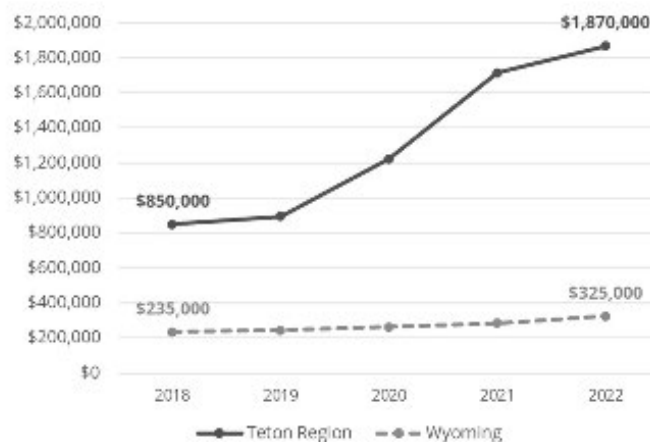


Figure VII-18 shows trends in property values for originated home purchase loans by occupancy type between 2018 and 2022. Home purchase loan originations for both principal residences and second residences showed that median value for each type of home has more than doubled since 2018. Median home values for originated loans for second residence purchases were \$1.2 million higher than median home values for originated loans for principal residence purchases.

**Figure VII-18.**  
**Median Home Value for Originated Home Purchase Loans by Occupancy**  
**Type, Teton Region, 2018-2022**

	Median Property Value		2018-2022 Change	
	2018	2022	Amount	Percent
<b>Teton Region</b>				
<b>Principal residence</b>	\$775,000	\$1,740,000	\$965,000	125%
<b>Second residence</b>	\$1,335,000	\$2,930,000	\$1,595,000	119%
<b>Investment property</b>	N/A	N/A	N/A	N/A

Note: Includes first lien loan originations only. Data are omitted for categories with fewer than 20 sales.

Source: HMDA and Root Policy Research.

Trends in home value by occupancy type in the Teton Region are further illustrated in Figure VII-19. Between 2018 and 2022, second residences saw the largest rise in median value (+\$1,595,000). Where data are available for investment properties, these had the lowest median values of any occupancy type.

**Figure VII-19.**  
**Median Home Value by**  
**Occupancy Type,**  
**Teton Region,**  
**2018-2022**

Note:

Includes first lien loan originations only. Data are not available for investment properties in 2018 or 2022 due to low volume of sales.

Source:

HMDA and Root Policy Research.

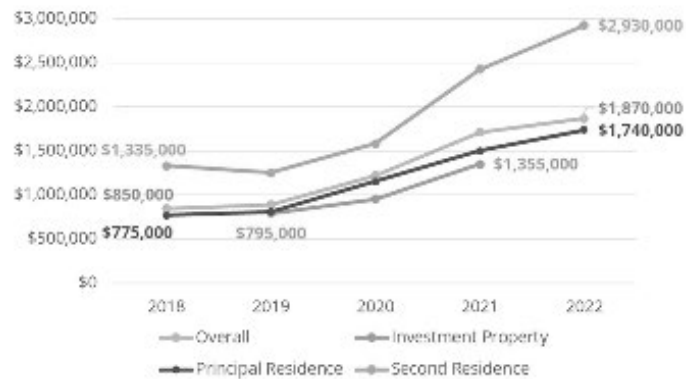
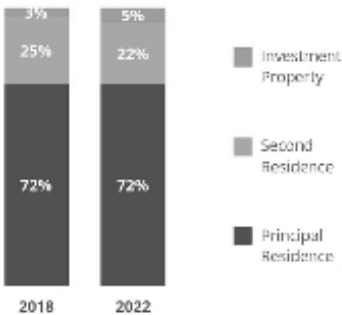


Figure VII-20 shows the composition of total loan originations by occupancy type for the Teton Region. In 2022, principal residences accounted for 72% of home purchase loan originations in the Teton Region, while 22% of home loan originations were for second residences (down from 25% in 2018) and 5% were for investment properties (up from 3% in 2018). As noted before, HMDA data only include home purchases that made use of a mortgage and excludes the number of homes that were purchased as second homes or investment properties with cash.

**Figure VII-20.**  
**Distribution of Home Purchase**  
**Loan Originations by Occupancy**  
**Type, Teton Region, 2018 and**  
**2022**

Note:  
Includes first lien originations only.

Source:  
HMDA and Root Policy Research.



**Home sales.** Assessor data from Wyoming’s Department of Revenue details home sales for single-family homes on ten acres or less for each county in Wyoming. Figure VII-21 shows the median sales price for housing units sold in Wyoming’s Teton Region in 2022. The median price for all housing units in the Region was \$2,500,000. Single family homes had the highest median price of any home type for which data are available at \$3,000,000. Townhomes and condos had the lowest median price of home types for which data are available at \$1,584,700.

**Figure VII-21.**  
**Median Home Sales Price by Structure Type, Teton Region, 2022**

	Median Sales Price				
	All Units	Single Family	Duplex	Townhome/Condo	Modular/Mobile Home
Teton Region	\$2,500,000	\$3,000,000	N/A	\$1,584,700	N/A

Note: Data are omitted for categories with fewer than 20 sales.

Source: Assessor data by the Wyoming Department of Revenue.

Figure VII-22 below shows the distribution of renters and home sales by Area Median Income (AMI). The renter distribution presents the distribution of renter incomes by AMI range, while the home sales distribution presents the distribution of homes sold affordable to households with such income levels without being cost burdened. Strikingly, 84% of Wyoming’s renters earn less than 151% AMI, but less than 1% of homes sold in 2022 were affordable at this price range—only one home was sold in this price range. Further, the 16% of renters who earn above 151% AMI likely cannot afford many of the homes priced at affordability levels above 151% AMI.



**Figure VII-22.**  
**Renter and Affordable Home Sales Distribution by AMI, Teton Region**

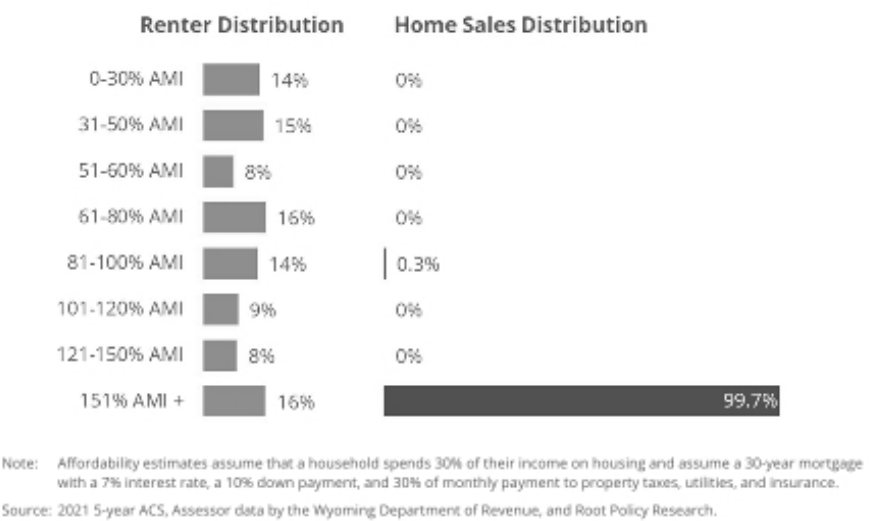
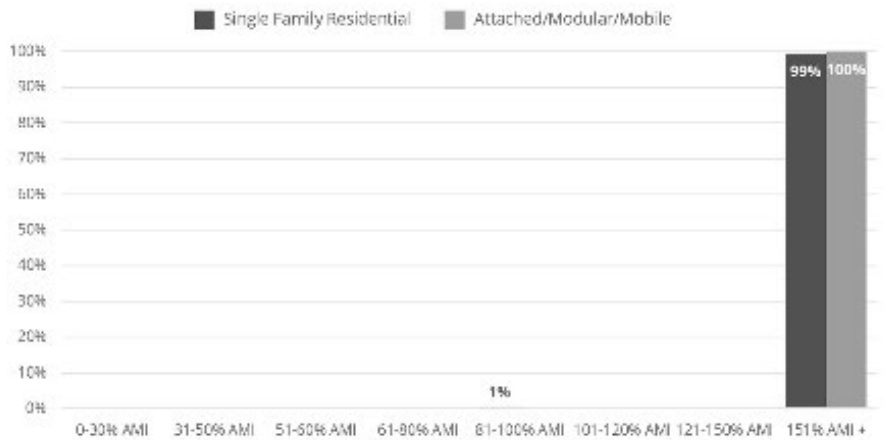


Figure VII-23 displays the shares of total single family homes and attached, modular, and mobile homes sold in 2022 that were affordable to buyers in each AMI range. In every other Wyoming region, this figure demonstrates that attached, modular, and mobile homes are, on average, more affordable than single family residential homes to low and moderate income earners. However, in the Teton Region, virtually all sales of both single family residential homes and attached, modular, and mobile homes occurred at the 150% AMI+ affordability level. Unlike in any other Wyoming region, low to moderate income earners in the Teton Region cannot look to attached, modular, and mobile homes as affordable alternatives to single family residential homes.

**Figure VII-23.**  
**Home Sales Distribution by AMI and Unit Type, Teton Region, 2022**



Note: Affordability estimates assume that a household spends 30% of their income on housing and assume a 30-year mortgage with a 7% interest rate, a 10% down payment, and 30% of monthly payment to property taxes, utilities, and insurance.  
Source: Assessor data by the Wyoming Department of Revenue and Root Policy Research.

**Housing Problems**

**Cost burden.** The federal government, and most housing programs, consider housing as affordable when the housing payment—the rent or mortgage payment, plus taxes and utilities—consumes 30% or less of a household’s gross income. Households who pay more than 30% are “cost burdened.” This standard is derived from historically typical mortgage lending requirements and is also applied to renters.

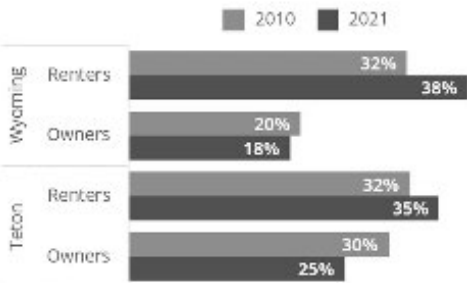
Households experiencing cost burden have less money to spend on other essentials like healthcare, education, groceries, and transportation—adversely affecting their household well-being, limiting their economic growth potential, and constraining local spending.

Figure VII-24 shows the shares of renters and owners in Wyoming and the Teton Region who experienced cost burden in 2010 and 2021. For each year studied in each area studied, renters face cost burden at higher rates than homeowners do. In 2021, the Teton Region's renters experienced cost burden at a slightly lower rate (35%) than Wyoming's renters, while its homeowners experienced a higher rate of cost burden than Wyoming's homeowners.

Between 2010 and 2021, the share of Wyoming renters experiencing cost burden rose by six percentage points from 32% to 38%, while the share of Wyoming homeowners experiencing cost burden decreased by two percentage points from 20% to 18%. Similarly, the share of Teton Region renters experiencing cost burden increased (32% to 35%), while the share of Teton Region homeowners experiencing cost burden decreased (30% to 25%).

**Figure VII-24.**  
**Cost Burden by Tenure,**  
**Wyoming and Teton**  
**Region, 2010 and 2021**

Source:  
2010 and 2021 5-year ACS estimates and  
Root Policy Research.

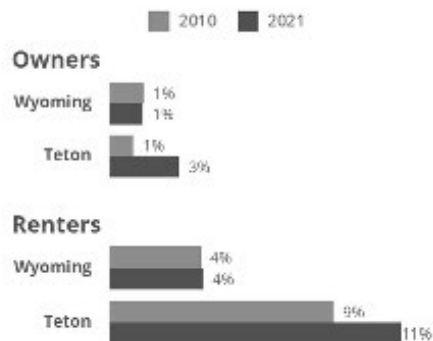


**Overcrowding.** Housing units are considered overcrowded when they are occupied by more than one person per room. Figure VII-25 illustrates the rate of overcrowding by tenure for Wyoming and the Teton Region.

In 2021, Renter households experienced overcrowding at around four times the rate of owner households in both Wyoming and the Teton Region. Both renter and owner households experience significantly higher overcrowding rates in the Teton Region than they do in Wyoming; this suggests that the lower rate of cost burden in Teton is due to residents doubling up to afford housing costs. Overcrowding has been stable overall for Wyoming's owner and renter households between 2010 and 2021, but it has increased by two percentage points each for both owners and renters in the Teton Region.

**Figure VII-25.**  
**Overcrowding by Tenure,**  
**Wyoming and Teton Region, 2010**  
**and 2021**

Source:  
 ACS 2021 5-year estimates and Root Policy Research.



## Short Term Rental Market

Short-term rentals, or STRs, play a unique role within housing markets, especially those with a large tourism industry, as they can provide economic benefit (to homeowners through rental revenue and the City through sales tax/tourism revenue) but may disrupt the long-term rental market if they account for a substantial portion of the total housing stock.

**Local Impact.** According to data from AirDNA (a market analytics website for short term rentals), there are 1,611 homes listed as short-term rentals (STRs) in Teton county and 646 STRs in Jackson.<sup>4</sup> These STRs, which may be active or inactive at the time of reporting, account for 7% of Jackson's housing stock and 12% of Teton county's housing stock<sup>5</sup>. This suggests that short-term rentals may constrain housing supply in the Teton Region overall.

Figure VII-26 below maps the volume of STRs in each ZIP Code in Teton county. While Jackson has the highest concentration of STRs, neighboring ZIP Code 83014 and Jackson Hole Resort ZIP Code 83025 each contain over 400 STRs.

<sup>4</sup> AirDNA.com provides market analytics of short term rentals (STRs) by ZIP Code. Because some ZIP Codes cross county lines, it is not possible to provide an exact picture of the STR market in Teton county. Teton county as presented in this section consists of the following ZIP Codes: 83025, 83014, 83001, 83011, 82190, 83013, 83012, 83002, and 83414. The town of Jackson is defined as its main ZIP Code, 83001.

<sup>5</sup> According to 2021 5-year ACS estimates, there are 8,823 total housing units in the 83001 ZIP Code Tabulation area and 13,365 total housing units in Teton county.

**Figure VII-26.  
Short Term Rental  
Units by ZIP Code,  
Teton County and  
Jackson, 2023**

**Note:**

Teton county as presented in this section consists of the following ZIP Codes: 83025, 83014, 83001, 83011, 82190, 83013, 83012, 83002, and 83414.

The town of Jackson is defined as its main ZIP Code, 83001.

This map uses ZIP Code Tabulation Areas (ZCTAs) from the U.S. Census Bureau to approximate ZIP Code boundaries. ZCTAs do not exist for uninhabited areas or areas with very few addresses. ZIP Codes without corresponding ZCTAs have not been mapped.

**Source:**

AirDNA.com

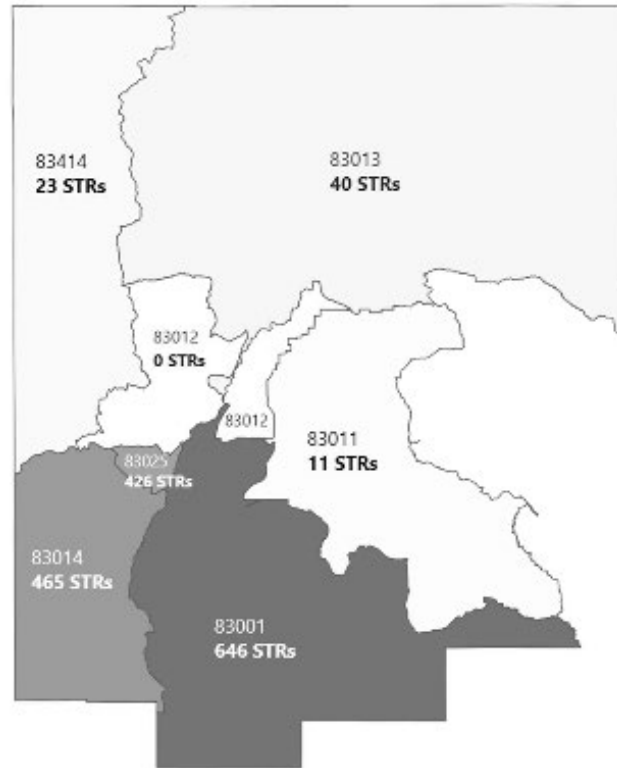
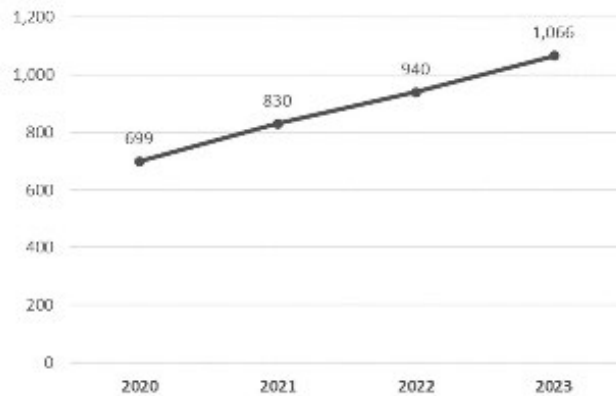


Figure VII-27 below demonstrates the steady increase in the number of active STRs in Teton county in November of each year, 2020-2023. Note that STR activity is seasonal, with higher activity typically observed in the summer months.

**Figure VII-27.  
Active Short Term  
Rental Units, Teton  
County, 2020-2023**

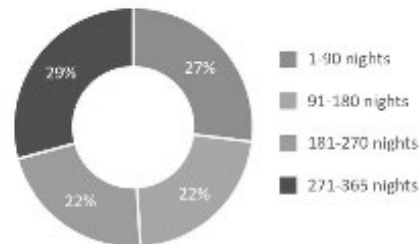
Note:  
Counts reflect units available in  
November of each year.  
Teton county as presented in this  
section consists of the following ZIP  
Codes: 83025, 83014, 83001, 83011,  
82190, 83013, 83012, 83002, and  
83414.  
Source:  
AirDNA.com



As shown in Figure VII-28, around half (49%) of short term rentals in Teton county are available for fewer than 180 nights per year. These are considered part-time STRs, some of which may be permanently occupied and rented occasionally, and others of which may be rented consistently and otherwise vacant or used seasonally.

**Figure VII-28.  
Short Term Rental Units by  
Annual Availability, Teton  
County, 2023**

Note:  
Teton county as presented in this section consists  
of the following ZIP Codes: 83025, 83014, 83001,  
83011, 82190, 83013, 83012, 83002, and 83414.  
Source:  
AirDNA.com



According to AirDNA, 90% of STRs in Teton county are entire homes, 9% are private rooms, and 1% are shared rooms. Figure VII-29 below shows the distribution of STRs by number of bedrooms. 22% of STRs in the county have 1 bedroom, 32% have 2 bedrooms, 24% have 3 bedrooms, 15% have 4 bedrooms, and 7% have 5 or more bedrooms.

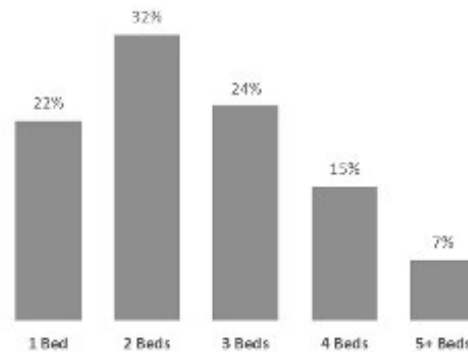
**Figure VII-29.**  
**Short Term Rental Units by**  
**Number of Bedrooms, Teton**  
**County, 2023**

Note:

Teton county as presented in this section consists of the following ZIP Codes: 83025, 83014, 83001, 83011, 82190, 83013, 83012, 83002, and 83414.

Source:

AirDNA.com



## Housing Needs Projections

This section estimates the number of housing units needed to accommodate household growth through 2030, using population projections prepared by the Wyoming Economic Analysis Division.

Figure VI-30 shows two estimates of the number of housing units Teton county needs to add to accommodate household growth and replace the loss in the housing stock. The first estimate assumes a housing loss of 0.24% every two years, and the second estimate assumes a housing loss of 1.7% every two years.<sup>6</sup> Estimates are shown as totals and by AMI, based on the state's AMI distribution provided by recent data from HUD's Comprehensive Housing Affordability Strategy (CHAS). The estimates indicate that by 2030, between 1,720 and 2,590 total housing units will be needed to accommodate Teton county households.

It should be highlighted that the estimates for the number of housing units needed for households in the lowest income range may not accurately reflect the actual demand due to the fact that many low-income individuals who work in Teton county live outside the county. This is because of the lack of affordable housing within the county, which forces these individuals to commute from other places.

According to data from the Census Bureau's Longitudinal Employer-Household Dynamics study, in 2021, over 9,200 workers commuted to work in Teton county, while only 1,500 Teton county residents commuted to work outside of the county. This highlights the fact that many people who work in Teton county are forced to live elsewhere, and the lack of

<sup>6</sup> According to the last Components of Inventory Change Report produced by HUD in 2017, which used American Housing Survey data, it was estimated that between 2015 and 2017, about 0.24% of the national housing stock was lost through demolitions or disasters alone. According to a Brookings Institute report, the two-year housing loss over the period 1985-2013 was 1.7% in the West region of the country (<https://www.brookings.edu/articles/unpacking-the-housing-shortage-puzzle/#:~:text=Churn%20is%20the%20sum%20of,built%20homes%20and%20no%20demolitions>).

affordable housing in the area is a significant contributing factor. This issue needs to be addressed in a comprehensive manner that takes into account the needs of low-income households and the overall economic development of the region, as the lack of affordable housing in the employment center has ripple effects on surrounding communities.

**Figure VII-30.**  
**Projected Housing Units Needed Between 2021 and 2030 by Tenure and AMI, Teton County**

	Renters		Homeowners		Total	
	Estimate 1	Estimate 2	Estimate 1	Estimate 2	Estimate 1	Estimate 2
<b>Teton</b>	<b>758</b>	<b>1,141</b>	<b>962</b>	<b>1,449</b>	<b>1,720</b>	<b>2,590</b>
<b>0%-30% AMI</b>	81	123	61	92	142	214
<b>31%-50% AMI</b>	165	248	60	90	225	338
<b>51%-80% AMI</b>	146	219	112	169	258	389
<b>81%-100% AMI</b>	115	173	120	181	235	354
<b>100% + AMI</b>	251	378	609	917	860	1,295

Note: Holds latest CHAS tenure and income distribution constant.

Source: HUD CHAS 2020 estimates, American Housing Survey, and Root Policy Research.

## Recommendations from Past Studies

The 2022 Teton Region Housing Needs Assessment<sup>7</sup> presents housing needs in the bi-state, tri-county, multi-jurisdictional region composed of Teton County, Wyoming, Teton County, Idaho, and Northern Lincoln County, Wyoming. The study examines the areas' regional connections related to jobs, housing, and community.

A summary of recommended strategies to address housing needs in the report includes:

- Maintaining a regional dialogue on housing policies, recognizing their local and regional implications, and collaborating on cross-jurisdictional solutions.
- Increase funding from public, private, and non-profit sources.
- Create a transparent way to allocate public funds to development partners. Consider a Housing Trust Fund that creates separations between the allocation entity and the development approval entity.
- Establish partnerships at the local and regional levels to influence state legislators and obtain a stable and significant long-term funding source. This can be achieved by implementing measures such as the Real Estate Transfer Tax or changes to the

<sup>7</sup> <http://jhaffordablehousing.org/DocumentCenter/View/21911/2022-Teton-Region-Housing-Needs-Assessment>



Lodging Tax. Enhance access to federal funds, including the American Rescue Plan Act (ARPA) and the Infrastructure Investment and Jobs Act, to improve housing.

- Increase and facilitate collaboration and coordination between housing providers, businesses, and developers.
- Convene employers to pool resources to build employee rental housing and provide management assistance.
- Engage the Hispanic community and diversify outreach and education to ensure better access to resources as this community has specific challenges and concerns that should be addressed when planning and building housing solutions.
- Dedicate resources to a non-governmental entity to educate the community about the value of having the workforce living locally, housing terms, projects in the pipeline, and to track and demonstrate community-wide successes. Look to existing organizations to help fill this niche where possible.
- Fund a non-governmental organization to educate the community about the value of having the workforce living locally, housing terms, upcoming projects, and tracking community-wide successes. Seek support from existing organizations if possible.
- Involve leaders and stakeholders in the Teton Region to help mitigate impacts associated with housing a portion of the county's the workforce in neighboring counties in the Region. encourage housing investments in neighboring communities—through technical assistance, shared resources, and collaborative planning—and establishing and funding a more robust regional public transit system.
- Collaborate with non-profits like Jackson Hole Community Housing Trust and Habitat for Humanity to target specific needs, stabilize employment, and optimize public funds.
- Preserve the limited supply of “naturally occurring” affordable housing, such as mobile homes, small apartments, and accessory units, and grow programs to support tenant rights.
- Expand investment in programs that use existing housing to serve workforce including Preservation Program; consider adding short-term rental conversion program.
- Prioritize public investments in affordable workforce housing proportional to the need. Recent developments are heavy for households earning over 120% AMI. Focus near-term investments on households earning less than 120% AMI. Larger per unit investments will be needed, but the resulting housing inventory will better serve the workforce.

- Encourage private sector to create workforce housing based on employment for households earning over 120% AMI through incentives, as private sector led efforts are a good fit for addressing this aspect of the housing need.
- Explore options that expand access to land opportunities for community housing. Although the current policy of concentrating workforce development within the town of Jackson supports many community goals and priorities; concentrating workforce in Jackson is expensive due to limited land.
- Exempt deed restricted housing from the growth cap. Invest in opportunities to involve the private sector in affordable housing solutions, including purchasing deed restricted units in new buildings, and creating a revolving impact fund that could reduce pre-development risk.

## Appendix

The following tables show AMI limits by county, examples of establishment types by industry, and federal poverty thresholds by household size.

**Figure VII-31.**  
**AMI Limits, Teton County,**  
**2021**

Source:  
U.S. Department of Housing and Urban  
Development.

2021 2-person AMI	Teton
30% AMI	\$27,750
50% AMI	\$46,250
80% AMI	\$37,000
100% AMI	\$92,500
120% AMI	\$111,000

**Figure VII-32.**  
**AMI Limits, Teton County,**  
**2022**

Source:  
U.S. Department of Housing and Urban  
Development.

2022 2-person AMI	Teton
30% AMI	\$29,520
50% AMI	\$49,200
80% AMI	\$39,360
100% AMI	\$98,400
120% AMI	\$118,080

**Figure VII-33.**  
**QCEW Establishment Examples by Industry**

Establishment Examples	
<b>Goods Producing</b>	
<b>Natural Resources &amp; Mining</b>	Farms, ranches, dairies, greenhouses, nurseries, orchards, hatcheries, mine operation and mining support activities.
<b>Construction</b>	General contractors, design-builders, construction managers, turnkey contractors.
<b>Manufacturing</b>	Plants, factories, mills.
<b>Service Providing</b>	
<b>Trade, Transportation, &amp; Utilities</b>	Wholesale merchants, distributors, shippers, import/export merchants, office supply retailers, computer and software retailers, building materials dealers, plumbing supply retailers, electrical supply retailers, electric power, natural gas, steam supply, water supply, and sewage removal.
<b>Information</b>	Software publishing, broadcasting and content providers, telecommunications, computing infrastructure providers, data processing, Web hosting.
<b>Financial Activities</b>	Commercial banks, credit unions, rental and leasing services.
<b>Professional &amp; Business Services</b>	Legal advice and representation, accounting, bookkeeping, payroll services, architectural, engineering, consulting services.
<b>Education &amp; Health Services</b>	Schools, colleges, universities, hospitals, nursing care facilities.
<b>Leisure &amp; Hospitality</b>	Hotels, restaurants, gambling establishments.
<b>Other Services</b>	Equipment and machinery repairing, grantmaking, advocacy, and providing drycleaning and laundry services, personal care services.
<b>Public Administration</b>	Federal, state, and local government agencies.

Source: BLS Quarterly Census of Employment and Wages.

**Figure VII-34.**  
**Federal Poverty Thresholds by Household Size, 2010**

Size of Family Unit	Weighted Average Thresholds	Related Children Under 18 Years								
		None	One	Two	Three	Four	Five	Six	Seven	Eight or More
One person (unrelated individual)	\$11,139									
Under 65 years	\$11,344	\$11,344								
65 years and over	\$10,458	\$10,458								
Two people	\$14,218									
Householder under 65 years	\$14,676	\$14,602	\$15,030							
Householder 65 years and over	\$13,194	\$13,180	\$14,973							
Three people	\$17,374	\$17,057	\$17,552	\$17,568						
Four people	\$22,314	\$22,491	\$22,859	\$22,113	\$22,190					
Five people	\$26,439	\$27,123	\$27,518	\$26,675	\$26,023	\$25,625				
Six people	\$29,897	\$31,197	\$31,320	\$30,675	\$30,056	\$29,137	\$28,591			
Seven people	\$34,009	\$35,896	\$36,120	\$35,347	\$34,809	\$33,805	\$32,635	\$31,351		
Eight people	\$37,934	\$40,146	\$40,501	\$39,772	\$39,133	\$38,227	\$37,076	\$35,879	\$35,575	
Nine people or more	\$45,220	\$48,293	\$48,527	\$47,882	\$47,340	\$46,451	\$45,227	\$44,120	\$43,845	\$42,156

Source: U.S. Census Bureau.

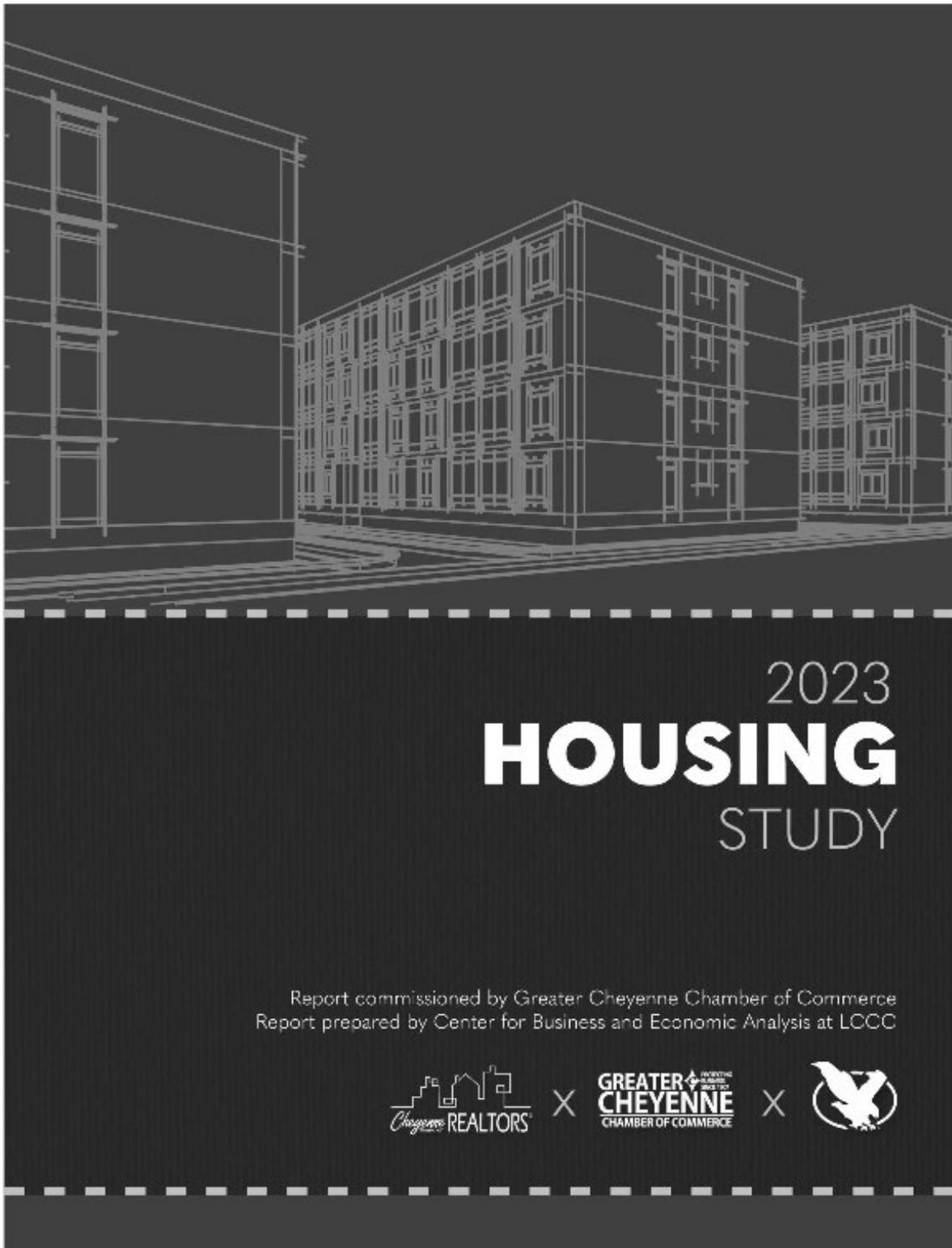
**Figure VII-35.**  
**Federal Poverty Thresholds by Household Size, 2021**

Size of Family Unit	Weighted Average Thresholds	Related Children Under 18 Years								
		None	One	Two	Three	Four	Five	Six	Seven	Eight or More
One person (unrelated individual)	\$13,788									
Under 65 years	\$14,097	\$14,097								
65 years and over	\$12,996	\$12,996								
Two people	\$17,529									
Householder under 65 years	\$18,231	\$18,145	\$18,677							
Householder 65 years and over	\$16,400	\$16,379	\$18,606							
Three people	\$21,559	\$21,196	\$21,811	\$21,831						
Four people	\$27,740	\$27,949	\$28,406	\$27,479	\$27,575					
Five people	\$32,865	\$33,705	\$34,195	\$33,148	\$32,338	\$31,843				
Six people	\$37,161	\$38,767	\$38,921	\$38,119	\$37,350	\$36,207	\$35,529			
Seven people	\$42,156	\$44,606	\$44,885	\$43,925	\$43,255	\$42,009	\$40,554	\$38,958		
Eight people	\$47,093	\$49,888	\$50,329	\$49,423	\$48,629	\$47,503	\$46,073	\$44,585	\$44,207	
Nine people or more	\$56,325	\$60,012	\$60,303	\$59,501	\$58,828	\$57,722	\$56,201	\$54,826	\$54,485	\$52,386

Source: U.S. Census Bureau.



Attachment: Cheyenne  
Chamber of Commerce  
Housing Report 2023



## **Overview**

The Center for Business and Economic Analysis at LCCC was contacted by the Greater Cheyenne Chamber of Commerce to conduct a study on affordable housing. The chamber wanted an estimation on the need for housing during the next five years along with consideration for additional housing from employees coming to the area for the Sentinel Project.

The Sentinel Project is a missile system replacement project. It involves infrastructure projects both on and off F.E. Warren Air Force Base and requires additional on-base operations personnel to oversee the replacement. The entire project is estimated to take 10 years and bring in 3,515 direct positions and 4,006 indirect positions(Sentinel EIS). Those positions and their impact on the housing market are discussed more in-depth in the Housing Demand section of this report.

## **Methodology**

Housing demand estimations were determined using data from the US Census on households and household income. The information on housing demand from the Sentinel Project were pulled from the environmental impact statement for the project. Estimations on renting versus buying came from the Survey of Consumer Finances.

Housing supply figures were estimated using data from the city and county planning departments. The number of new single-family homes – including condominiums and townhouses – were tracked using construction permit reports for Cheyenne and Laramie County. The same construction permit reports were used to track new multi-family housing units. New home values were determined by dividing the permit value by 0.6095. 60.95% is the average percent of home sales price attributed to construction costs in 2019(61.1%) and 2022(60.8%) from the National Association of Home Builders' Construction Cost Surveys.

Single home affordability was based on debt-to-income(DTI) ratios used by lenders. A home is considered affordable if no more than 30% of income goes towards housing costs, including both mortgage payments and utilities(HUD). However, your approval can be well above 30%. Federal Housing Administration(FHA) loans usually require a DTI below 43%, but can max out lending to 57%(FHA). Wyoming Community Development Authority(WCDA) loans have a maximum DTI of 45%(Wyoming CDA). Conventional loans have a maximum DTI of 45% with an allowance up to 50% if the borrower has other outstanding factors, like a high savings account balance(FannieMae). Veteran's Affairs loans have no maximum DTI, but scrutinizes borrowers if their DTI exceeds 41%. For these analyses, 45% DTI was used, which is the maximum DTI for WCDA loans and conventional loans and splits the difference between the suggested 30% and maximum 57%. Affordability tables were developed based on current market rates for 30-year fixed rate mortgages, down payment sizes(3.5%, 10%, 20%), and various levels of other debt(car payments, student loan payments, etc.). Based on current market conditions, households earning below \$50,000 per year are unlikely to find a single-family home that would be considered affordable. Analyses were conducted for households earning \$50,000, \$75,000, \$100,000, and \$150,000.

## **Housing Demand Estimations**

From 2010 to 2020, the US Census Bureau estimated that Laramie County added 4,412 households. Data from 2021 were omitted because of messy data due to Covid-19 and layoffs. 2021 data accounted for short-term layoffs in 2020 and 2021 and unemployment returned to pre-Covid levels



in 2022 and 2023. Trends from 2010-2020 to estimate the number of households from 2023 to 2028.

Based on census data, Laramie County is projected to add 2,215 households between 2023 and 2028. The number of households earning below \$50,000 is projected to decrease by 1,490, the number of households earning between \$50,000 and \$150,000 is projected to increase by 2,390, and the number of households earning more than \$150,000 projected to increase by 1,315. The total population is projected to increase by 5,025 during the same time period.

In addition to those trends, Laramie County and the surrounding areas will be impacted by the Sentinel Project. This is a major missile replacement project that involves construction projects on and off F.E. Warren Air Force Base and additional operations positions located on base during the entirety of the project. All labor and population estimations related to the Sentinel Projects were estimated with IMPLAN and come directly from the official environmental impact report for the project.

The on-base construction projects are expected to bring in 665 directly hired positions and an additional 213 additional positions are expected to be created indirectly due to the increase in population. Of the 665 directly hired workers, 532 are expected to migrate into the area. Of the 213 additional indirect workers, 64 are expected to migrate into the area. In total, 596 workers are expected to migrate into the area, with 65 percent of them having additional family members moving with. The population increase associated with on-base construction is estimated to be 1,452 people total(596 workers, 856 family members). These positions are estimated to persist for 10 years.

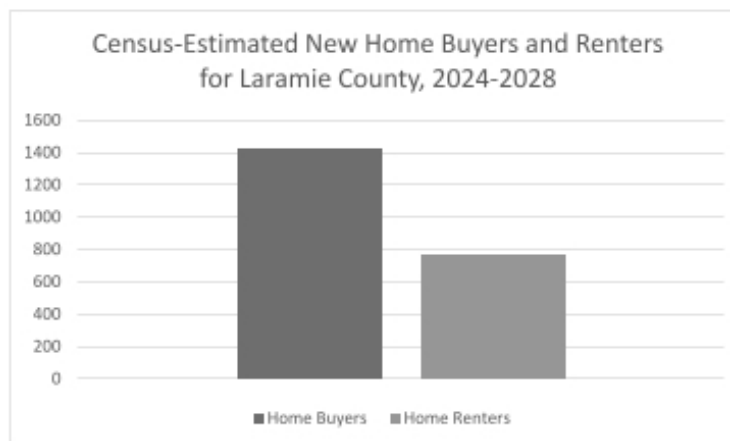
The operations of the project, located on-base, are expected to add 350 positions directly and 91 positions indirectly. Of the 350 direct positions, 280 are expected to migrate to the area and 70 are expected to be from the area. Of the 91 indirect positions, 27 are expected to migrate to the area and 64 are expected to be from the area. Of the 307 workers expected to move to the area, 200 are expected to bring family members. In total, the population is expected to increase by 749(307 workers, 441 family members). These positions are estimated to persist for 10 years. After 10 years, those positions will move to the next segment of the Sentinel Project, taking along 101 additional positions(80 direct, 21 indirect) and 172 people total(70 workers, 102 family members).

Off-base construction projects will be primarily in western Nebraska and the town of Kimball, Nebraska will be the main hub of that workforce. The off-base construction is estimated to create 2,500 jobs directly, all of which will be housed in a temporary workforce hub. There are an estimated 3,702 jobs that are indirectly tied to the off-base construction. Of those, 2,591 are expected to be local to the Kimball area and 1,111 are expected to migrate into the area. Of the 1,111 workers moving into the area, 722 are expected to bring additional family members. In total, a population increase of 2,706(1,111 workers, 1,595 family members) is expected. However, because the center of off-base construction is Kimball, Nebraska and not Cheyenne, just a fraction of the 2,706 people will move to Laramie County. If 10 percent of that workforce moves to the county, expect to see a population increase of 271 people(111 workers, 160 family members). These positions are expected to persist for five years.

Based on US Census data, 8.9% of the Laramie County workforce commutes in from somewhere other than Laramie County. The Sentinel Project is set to have approximately 1,014 new households move to the area. 924 are expected to move to Laramie County, with the other 90 living elsewhere

and commuting in. Between natural population increases and the Sentinel Project, about 3,162 households are expected to move to Laramie County. The population is expected to increase by 7,277.

Data from the Federal Reserve Survey of Consumer Finances, most recently conducted in 2019, was used to estimate the likelihood of renting v. buying for households. This survey collects data from consumers on income and living arrangements, specifically whether the households rent or own their homes. Applying the likelihoods of renting and buying for each income level and assuming our population coming in from natural growth is distributed evenly for all 2,215 new households, it is estimated that 777 of the new households coming in will rent and 1,438 will buy.



For the on-base construction projects, the average direct worker is estimated to make \$56,995/year, making them slightly more likely to buy instead of rent. If every direct worker earns the average salary, about 49.5 percent of those workers will rent and 50.5 percent of those workers will buy. It is estimated that 240 households will rent in Laramie County, 245 households will buy in Laramie County, and 47 will choose to live outside Laramie County and commute in.

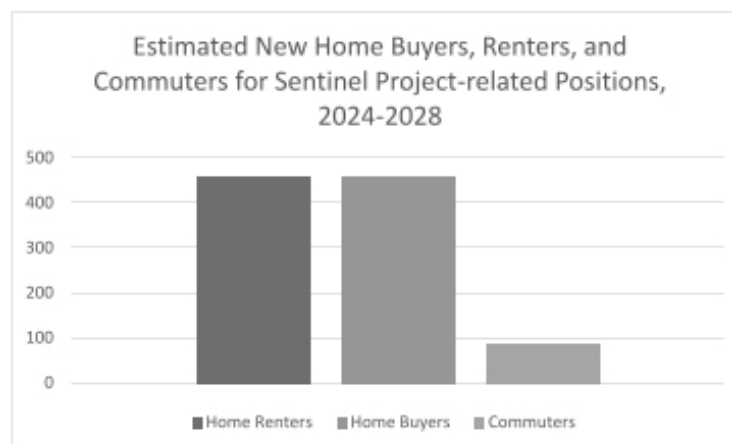
The average indirect worker tied to on-base construction is estimated to make \$45,867/year, making them more likely to rent instead of buy. If every indirect worker earns the average salary, 56.1 percent of those workers will rent and 43.9 percent of those workers will buy. It is estimated that 33 households will rent in Laramie County, 26 households will buy in Laramie County, and 5 will choose to live outside Laramie County and commute in.

For the on-base operations projects, the average direct worker is estimated to make \$85,350/year, making them more likely to buy than rent. If every direct operations worker earns the average salary, 36.6 percent of those workers will rent and 63.4 percent of those workers will buy. It is estimated that 93 households will rent in Laramie County, 162 households will buy in Laramie County, and 25 will choose to live outside Laramie County and commute in.

For the on-base operations projects, the average indirect worker is estimated to make \$38,856/year, making them more likely to rent instead of buy. If every indirect worker earns the average salary, 60.2 percent of those workers will rent and 39.8 percent of those workers will buy. It is estimated

that 15 households will rent in Laramie County, 10 households will buy in Laramie County, and 2 will choose to live outside Laramie County and commute in.

For the off-base construction projects, the average indirect worker is estimated to make \$55,804/year, making them equally likely to rent or buy. If every indirect worker earns the average salary, 50 percent of those workers will rent and 50 percent of those workers will buy. Because of the shorter term for these positions, the likelihood of renting will be higher, probably closer to 80 percent. It is estimated that 81 households will rent in Laramie County, 20 households will buy in Laramie County, and 10 will choose to live outside Laramie County and commute in.



In the next five years, between natural population growth and the Sentinel Project, it is estimated that 1,239 new households will move to Laramie County and want to rent housing and 1,901 new households will move to Laramie County and want to buy homes.

#### Housing Supply Estimations

From 2018 to 2022, the city of Cheyenne approved permits on 977 single-family residences. In that same time frame, they approved 125 number of multi-family permits to add an additional 888 housing units. In 2023, Cheyenne is on track to approve just 80 single-family homes and 16 multi-family permits to add an additional 64 units. The 80 single-family permits are the lowest count since 1991.

From 2018 to 2022, the remainder of Laramie County approved permits on 1,092 single-family residences. In that same time frame, they approved two multi-family permits to add an additional 12 housing units. The county also approved permits for 109 new mobile homes. In 2023, the remainder of Laramie County is on track to approve 94 single-family homes and 18 new mobile homes. The 94 single-family permits are the lowest count since 2011.

Interest rates, in an effort to combat inflation, have also slowed construction builds. Within the next five years, it seems unlikely that interest rates will fall to the levels seen before Covid. Investment experts think there will be incremental decreases starting in late 2024/early 2025(Bloomberg). That should not only encourage more homebuilding, due to cheaper lines of credit, but also encourage

homebuying due to lower mortgage interest rates. However, rate decreases will likely be offset by construction labor cost increases due to the on-base and off-base construction projects during the next five to ten years.

In Cheyenne in 2018, the average new single-family permit value was \$211,999, leading to an average new home estimated value of \$347,824. So far in 2023, the average single-family permit value is \$266,751, leading to an average new home value of \$437,655.

In the remainder of Laramie County in 2018, the average new single-family permit value was \$181,293, leading to an average new home estimated value of \$297,446. So far in 2023, the average single-family permit value is \$211,127, leading to an average new home value of \$346,394.

In the last year and a half, the city and county approved permits for 456 new single-family homes. However, just 34 single-family housing permits would be considered affordable for a family making \$50,000 with 0 debt and a 3.5% down payment, the most common down payment. That trend is likely to continue downward as construction costs climb during the on-base and off-base construction projects and as mortgage interest rates continue to stay higher than 7%. We estimate that new home builds will pick up slowly over the next five years.

In August 2023, Laramie County had 387 single-family homes available for sale (227 in Cheyenne, 117 in the remainder of Laramie County, 43 townhomes/condos). In September 2023, there were 239 rental listings on HotPads.com, the broadest listing of rental advertisements. On that site, there were 104 apartments, 72 condos/townhomes/duplexes, and 63 single-family homes available to rent in September. Comparable sites, like Zillow (219) and Trulia (230), had similar figures and the overwhelming majority of listings were copied on all three sites.

In terms of affordability, three listings were for apartments for low-income renters. Only eight others were listed for less than \$800/month. Nearly 40 percent of available rental listings were for over \$1,600/month.

In the most recent data from the Economic Analysis Division at the state, Laramie County had the second-highest average rent for apartments in the state, trailing only Teton County. Average for a two-bedroom, unfurnished apartment in the second quarter of 2022 was \$1,008 dollars. That was up 9.1% from the second quarter 2021. If the annual rate of increase continues into 2023, the average monthly rent for a two-bedroom apartment will show \$1,100 in the second quarter of 2023.

The average rental rate for a house in Laramie County was \$1,587, the second-highest rate in the state behind Teton County. The house rental rate is up 9.1% from the second quarter of 2021. If the annual rate of increase continues into 2023, the average monthly rent for a house will show \$1,731 in the second quarter of 2023.

The average rental rate for a mobile home, including lot rent, in Laramie County was \$1,152, the second-highest rate in the state behind Teton County. The mobile home rental rate is up 17.7% from the second quarter of 2021. If the annual rate of increase continues into 2023, the average monthly rent for a mobile home will show \$1,356 in the second quarter of 2023.

New apartment builds are harder to estimate, due to the extended time it takes for apartment approval. There are more zoning restrictions, height restrictions around the capitol, and parking requirements that make large apartment complexes nearly impossible to predict, so we've not

included them in our estimations. Small buildings, with 4 units, are much more common. Small apartment building construction, like single-family housing, is expected to improve marginally in the next five years.

#### Housing Surplus/Shortage Estimation

Interest rates and inflation rates are expected to fall incrementally throughout the next five years. Construction labor will likely to be harder to hire in the next five years due to demand for construction labor for the Sentinel Project. Home-building figures are expected to improve, but only incrementally, over the next five years. If we assume the home-buying population increases by a fixed amount every year, we will end up about 534 single-family homes short of what's needed by 2028.

#### Single-Family/Townhome/Condo Surplus/Shortage Estimates

Year	New Homebuyers	New Homes	Existing Stock	Surplus/Shortage
2024	380	172	387	179
2025	380	184	179	-17
2026	380	196	0	-184
2027	380	208	0	-172
2028	381	220	0	-161

Because apartment complex permits are more irregular, they are harder to estimate. If the number of 4-unit permits increases by 2 per year starting in 2025, due to lower interest and inflation rates, and those are the only ones added, Laramie County will be short 600 units by 2028.

#### Apartment Surplus/Shortage Estimates

Year	New Renters	New Apartments	Existing Stock	Surplus/Shortage
2024	248	64	239	55
2025	248	72	55	-121
2026	248	80	0	-168
2027	248	88	0	-160
2028	247	96	0	-151

On average, Laramie County adds about 17 new mobile homes every year. That would be 85 new mobile homes by 2028. Combining all expected new builds, new apartments, and new mobile homes, Laramie County will be short 1,050 housing units in five years. To have a properly functioning housing market, Laramie County will be 1,150 – 1,250 housing units short of what's needed.

#### **Recommendations**

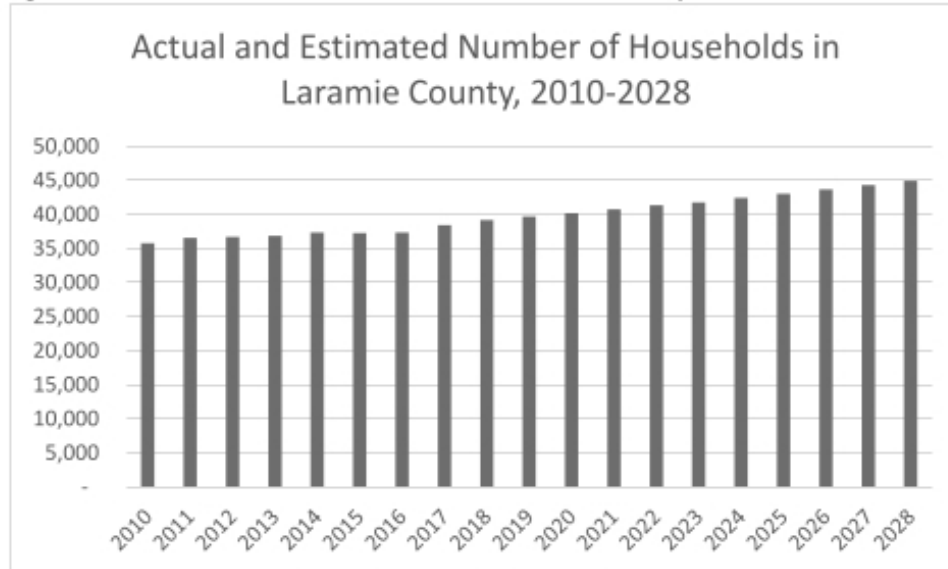
I would recommend making any change possible to allow for more multi-family housing, whether it's removing height restrictions, rezoning land, or changing parking restrictions. Any change to make apartments easier to get approved will help ease the housing shortage Laramie County will face. Apartments are of more importance to alleviating the problem for two reasons. First and most obvious, apartments house more people in fewer projects. Second and less obvious, the positions tied to the Sentinel Project are relatively short-term. On-base operations and construction projects are for 10 years and move on to Montana. My estimations for home ownership for those positions may be overstated if workers come in toward the latter end of the project.

I would also recommend minimum lot size changes for single-family homes. Smaller lot sizes allow for more single-family homes to be built and to be built more densely, which means land acquisition won't be nearly as onerous. Any opportunities for home-ownership will be preferred to renting, so the best options under current conditions are condos and townhomes.

Another suggestion, and one that is getting started, is expansion of on-base housing and near-base housing. A large enough on-base complex could help house on-base operations personnel and reduce the need for housing outside of the base. Large complexes near the base could house on-base construction crews and other non-military personnel. The proposed location, next to I-25 and Happy Jack Road, would be ideal for both military members and non-military personnel hired to work on the base.

## Appendix

**Figure 1. Actual and Estimated Number of Households in Laramie County**



Source: US Census Bureau and Sentinel Environmental Impact Statement

**Table 1. Proposed Action IMPLAN Model Output for F.E. Warren AFB On-Base Construction**

Impact Type	Employment	Labor Income(\$)	Value Added(\$)	Output(\$)
Direct Effect	665	\$37,902,224	\$28,756,743	\$60,970,000
Indirect Effect	213	\$9,769,686	\$18,894,707	\$36,675,143
<b>Total Effect</b>	<b>878</b>	<b>\$47,671,910</b>	<b>\$47,651,450</b>	<b>\$97,645,143</b>

Source: IMPLAN 2021

**Table 2. Proposed Action Estimated Population Changes from F.E. Warren AFB On-Base Construction**

Workers and Families	Direct Workers and Families	Indirect Workers and Families	Total Workers and Families
Number of jobs	665	213	878
Local workers	133	149	282
Migrating workers	532	64	596
Single migrating workers	186	23	209
Migrating workers bringing family	346	41	387
Migrating workers family members	764	92	856
<b>Total Population Change</b>	<b>1,296</b>	<b>156</b>	<b>1,452</b>

Source: IMPLAN 2021

**Tables 3 and 4. Proposed Action IMPLAN Model Output for F.E. Warren AFB On-Base Operations**  
**Peak Operations**

Impact Type	Employment	Labor Income(\$)	Value Added(\$)	Output(\$)
Direct Effect	350	\$29,872,618	\$39,979,914	\$39,979,914
Indirect Effect	91	\$3,535,946	\$7,338,477	\$13,506,562
<b>Total Effect</b>	<b>441</b>	<b>\$33,408,564</b>	<b>\$47,318,391</b>	<b>\$53,486,476</b>

Source: IMPLAN 2021

**End-State Operations**

Impact Type	Employment	Labor Income(\$)	Value Added(\$)	Output(\$)
Direct Effect	-80	-\$6,828,027	-\$9,138,266	-\$9,138,266
Indirect Effect	-21	-\$808,216	-\$1,677,366	-\$3,087,214
<b>Total Effect</b>	<b>-101</b>	<b>-\$7,646,243</b>	<b>-\$10,815,632</b>	<b>-\$12,225,480</b>

Source: IMPLAN 2021

**Tables 5 and 6. Proposed Action Estimated Population Changes from F.E. Warren AFB On-Base Operations**

**Peak Operations**

Workers and Families	Direct Workers and Families	Indirect Workers and Families	Total Workers and Families
Number of jobs	350	91	441
Local workers	70	64	134
Migrating workers	280	28	307
Single migrating workers	98	10	108
Migrating workers bringing family	182	18	200
Migrating workers family members	402	39	441
<b>Total Population Change</b>	<b>682</b>	<b>67</b>	<b>749</b>

Source: IMPLAN 2021

**End-State Operations**

Workers and Families	Direct Workers and Families	Indirect Workers and Families	Total Workers and Families
Number of jobs	-80	-21	-101
Local workers	-16	-15	-31
Migrating workers	-64	-6	-70
Single migrating workers	-22	-2	-24
Migrating workers bringing family	-42	-4	-46
Migrating workers family members	-93	-9	-102
<b>Total Population Change</b>	<b>-157</b>	<b>-15</b>	<b>-172</b>

Source: IMPLAN 2021



**Table 7. Proposed Action IMPLAN Model Output for F.E. Warren AFB Off-Base Construction**

Impact Type	Employment	Labor Income(\$)	Value Added(\$)	Output(\$)
Direct Effect	2,500	\$381,781,028	\$217,019,498	\$501,816,660
Indirect Effect	3,702	\$206,588,438	\$364,363,843	\$666,961,876
<b>Total Effect</b>	<b>6,202</b>	<b>\$588,369,466</b>	<b>\$581,383,341</b>	<b>\$1,168,778,536</b>

Source: IMPLAN 2021

**Table 8. Proposed Action Estimated Population Changes from F.E. Warren AFB Off-Base Construction**

Workers and Families	Indirect Workers and Families
Number of jobs	3,702
Local workers	2,591
Migrating workers	1,111
Single migrating workers	389
Migrating workers bringing family	2,317
Migrating workers family members	1,595
<b>Total Population Change</b>	<b>2,706</b>

Source: IMPLAN 2021

**Tables 9, 10, and 11. Home Affordability by Income Levels and Debt Levels**

The top row is gross income level. The leftmost column is level of monthly debt obligations that are not home-related. The home prices are the maximum amount approved by lenders at 45% DTI.

**3.5% Down Payment**

	\$50,000/year	\$75,000/year	\$100,000/year	\$150,000/year
<b>\$0</b>	\$226,000	\$339,000	\$452,000	\$679,000
<b>\$250</b>	\$196,000	\$309,000	\$422,000	\$649,000
<b>\$500</b>	\$166,000	\$279,000	\$392,000	\$618,000
<b>\$750</b>	\$135,000	\$249,000	\$362,000	\$588,000
<b>\$1,000</b>	\$105,000	\$218,000	\$332,000	\$558,000
<b>\$1,250</b>	\$75,000	\$188,000	\$302,000	\$528,000
<b>\$1,500</b>	\$45,000	\$158,000	\$271,000	\$498,000

Source: ConsumerFinance.gov

**10% Down Payment**

	\$50,000/year	\$75,000/year	\$100,000/year	\$150,000/year
<b>\$0</b>	\$250,000	\$375,000	\$501,000	\$751,000
<b>\$250</b>	\$217,000	\$342,000	\$467,000	\$718,000
<b>\$500</b>	\$183,000	\$309,000	\$434,000	\$684,000
<b>\$750</b>	\$150,000	\$275,000	\$401,000	\$651,000
<b>\$1,000</b>	\$117,000	\$242,000	\$367,000	\$618,000
<b>\$1,250</b>	\$83,000	\$208,000	\$334,000	\$584,000
<b>\$1,500</b>	\$50,000	\$175,000	\$300,000	\$551,000

Source: ConsumerFinance.gov

**20% Down Payment**

	\$50,000/year	\$75,000/year	\$100,000/year	\$150,000/year
<b>\$0</b>	\$291,000	\$437,000	\$583,000	\$874,000
<b>\$250</b>	\$252,000	\$398,000	\$544,000	\$835,000
<b>\$500</b>	\$213,000	\$359,000	\$505,000	\$796,000
<b>\$750</b>	\$175,000	\$320,000	\$466,000	\$756,000
<b>\$1,000</b>	\$136,000	\$281,000	\$427,000	\$718,000
<b>\$1,250</b>	\$97,000	\$242,000	\$388,000	\$680,000
<b>\$1,500</b>	\$58,000	\$203,000	\$349,000	\$641,000

Source: ConsumerFinance.gov

**Table 12. New Single-Family Homes by Affordability for a 3.5% Down Payment**

Price Bracket	2018	2019	2020	2021	2022	2023(Through June)
Under \$226,000	45	54	39	34	24	10
\$226,000-\$339,000	171	158	156	166	148	20
\$339,000-\$452,000	122	135	185	169	97	33
\$452,000-\$679,000	30	31	64	114	95	21
Over \$679,000	0	3	6	17	7	2

Source: City of Cheyenne Compliance Division and Laramie County Planning and Development

**Table 13. Rental Listings by Price**

Price Range(Monthly Rent Only)	Count
Income-restricted Apartments	3
Under \$800/month	8
\$800/month - \$999/month	44
\$1,000/month - \$1,199/month	34
\$1,200/month - \$1,399/month	32
\$1,400/month - \$1,599/month	26
\$1,600/month - \$2,000/month	61
Over \$2,000/month	31

Source: Hotpads.com, September 2023

**Table 14. Likelihood of Renting versus Owning by Income Percentile**

Income Percentile	Likelihood to Rent	Likelihood to Own
0-24.9%	60.6%	39.4%
25-49.9%	41.8%	58.2%
50-74.9%	27.5%	72.5%
75-99.9%	10.5%	89.5%

Source: RubyHome – Data from Survey of Consumer Finances, 2019

**Data Sources**

## Population/Household Growth

- IMPLAN
- Sentinel Project Environmental Impact Study
- US Census Bureau

## Home Affordability

- Consumer Financial Protection Bureau
- Fannie Mae
- Federal Housing Administration
- Housing and Urban Development
- National Association of Homebuilders
- State of Wyoming Economic Analysis Division
- Veteran's Affairs Administration
- Wyoming Community Development Authority
- Wyoming Smart Capital Network

## Housing Availability

- Bloomberg.com
- Cheyenne Board of Realtors
- City of Cheyenne Compliance Division
- Hotpads.com
- Laramie County Planning and Development
- RubyHome.com
- Survey of Consumer Finances
- Trulia.com
- Zillow.com



Attachment: United  
Way Funding  
Agreement and  
Demographics

**EXHIBIT A: United Way and City of Cheyenne Professional Services Agreement for 3-Year Annual Disbursement 2023-2025**

**SCOPE OF WORK**

During the entire term of the contract, the Consultant shall provide technical assistance to community programs that provide necessary relief to the poor. The Consultant will also provide funding on an annual basis to each agency as specified below:

**Economic Mobility**

Climb Wyoming (Lead)  
My Front Door

**Amount**

\$13,333

\$13,334

**Subtotal \$26,667**

**Economic Mobility: Direct Homeless Services**

COMECA, Inc (Lead)  
Family Promise  
Safehouse  
Unaccompanied Students Initiative  
Bethel Outreach Ministries

**Amount**

\$21,845.67

\$ 6,845.67

\$13,000

\$11,845.66

\$6,845.67

**Subtotal \$60,382.67**

**Education**

Boys & Girls Club of Cheyenne (Lead)  
ASK- After School Kids Program  
Foster Grandparent Program  
Special Friends  
Big Brothers Big Sisters  
NEEDS

**Amount**

\$25,000

\$10,705.68

\$6,000

\$15,000

\$7,500

\$24,127.65

**Subtotal \$88,333.33**

**Health: Patient-Centered Mobility**

Health Works (Lead)  
Meals on Wheels  
Recover Wyoming  
CASA  
Safe Harbor  
Wyoming 2-1-1

**Amount**

\$41,443.68

\$7,500

\$5,000

\$7,000

\$7,000

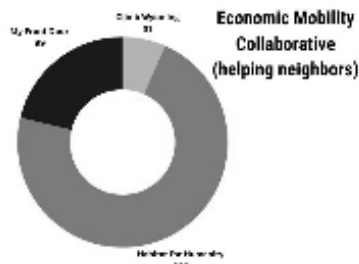
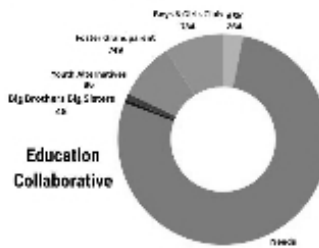
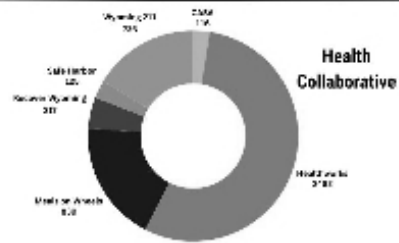
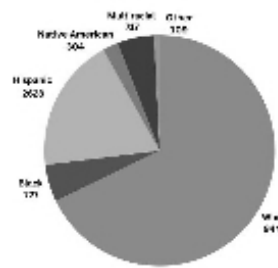
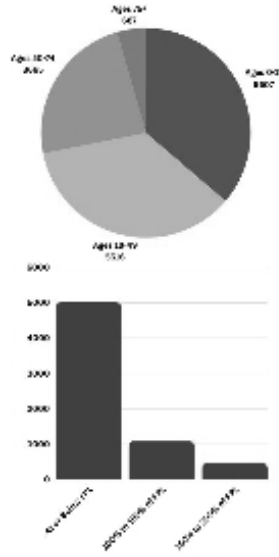
\$6,673.32

**Subtotal \$74,617.00**

**Grand Total \$250,000.00**

# **Total Clients Served Through United Way of Laramie County**

Based on data received from program partners as of 2/15/24



**Grantee SF-424's and Certification(s)**



**Attachment:**

HUD SF-424, Certifications and Assurances  
for Program Year 2024

Annual Action Plan


Amendment



Approved as to  
form only:  
*Stephan Boster*  
Date: 12/20/24

OMB Number: 4040-0004  
Expiration Date: 11/30/2025

Application for Federal Assistance SF-424		
<b>* 1. Type of Submission:</b> <input type="checkbox"/> Preapplication <input checked="" type="checkbox"/> Application <input type="checkbox"/> Changed/Corrected Application		
<b>* 2. Type of Application:</b> <input checked="" type="checkbox"/> New <input type="checkbox"/> Continuation <input type="checkbox"/> Revision		
<b>* If Revision, select appropriate letter(s):</b> _____ <b>* Other (Specify):</b> _____		
<b>* 3. Date Received</b> 12/29/2024		<b>4. Applicant Identifier:</b> CITY OF CHEYENNE
<b>5a. Federal Entity Identifier:</b> H0D		<b>5b. Federal Award Identifier:</b> B-24-MC-66-0002
<b>State Use Only:</b>		
<b>6. Date Received by State:</b> _____		<b>7. State Application Identifier:</b> _____
<b>8. APPLICANT INFORMATION:</b>		
<b>* a. Legal Name:</b> CITY OF CHEYENNE		
<b>* b. Employer/Taxpayer Identification Number (EIN/TIN):</b> 83-6000050		<b>* c. UEI:</b> KURRMRK2UFMY2
<b>d. Address:</b>		
<b>* Street1:</b> 2101 O'Neil Avenue		
<b>Street2:</b> _____		
<b>* City:</b> Cheyenne		
<b>County/Parish:</b> _____		
<b>* State:</b> WY: Wyoming		
<b>Province:</b> _____		
<b>* Country:</b> USA: UNITED STATES		
<b>* Zip / Postal Code:</b> 82001-3512		
<b>e. Organizational Unit:</b>		
<b>Department Name:</b> CITY OF CHEYENNE		<b>Division Name:</b> Housing & Community Dev.
<b>f. Name and contact information of person to be contacted on matters involving this application:</b>		
<b>Prefix:</b>	Ms.	<b>* First Name:</b> Amy
<b>Middle Name:</b>	Marie	
<b>* Last Name:</b>	Gorbey	
<b>Suffix:</b>	_____	
<b>Title:</b> Community Development Manager		
<b>Organizational Affiliation:</b> _____		
<b>* Telephone Number:</b> 307-637-6255		<b>Fax Number:</b> _____
<b>* Email:</b> agorbey@cheyennecity.org		

Application for Federal Assistance SF-424	
16. Congressional Districts Of:	
* a. Applicant <input type="text" value="AY-001"/>	* b. Program/Project <input type="text" value="Cheney"/>
Attach an additional list of Program/Project Congressional Districts if needed.	
<input type="text"/> <input type="button" value="Add Attachment"/> <input type="button" value="Delete Attachment"/> <input type="button" value="View Attachment"/>	
17. Proposed Project:	
* a. Start Date <input type="text" value="07/01/2024"/>	* b. End Date <input type="text" value="06/30/2025"/>
18. Estimated Funding (\$):	
* a. Federal	429,116.00
* b. Applicant	0.00
* c. State	0.00
* d. Local	0.00
* e. Other	55,000.00
* f. Program Income	0.00
* g. TOTAL	554,116.00
* 19. Is Application Subject to Review By State Under Executive Order 12372 Process? <div style="margin-left: 20px;"> <input type="checkbox"/> a. This application was made available to the State under the Executive Order 12372 Process for review on <input type="text"/> </div> <div style="margin-left: 20px;"> <input type="checkbox"/> b. Program is subject to E.O. 12372 but has not been selected by the State for review.           </div> <div style="margin-left: 20px;"> <input checked="" type="checkbox"/> c. Program is not covered by E.O. 12372.           </div>	
* 20. Is the Applicant Delinquent On Any Federal Debt? (If "Yes," provide explanation in attachment.) <div style="margin-left: 20px;"> <input type="checkbox"/> Yes    <input checked="" type="checkbox"/> No           </div> <div style="margin-left: 20px;">             If "Yes", provide explanation and attach <input type="text"/> </div> <div style="margin-left: 200px;"> <input type="button" value="Add Attachment"/> <input type="button" value="Delete Attachment"/> <input type="button" value="View Attachment"/> </div>	
21. "By signing this application, I certify (1) to the statements contained in the list of certifications** and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances** and agree to comply with any resulting terms if I accept an award. I am aware that any false, fraudulent, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001) <div style="margin-left: 20px;"> <input checked="" type="checkbox"/> ** I AGREE           </div> <div style="margin-left: 20px; font-size: small;">             ** The list of certifications and assurances or an interim plan where you may obtain this list, is contained in the announcement or agency specific instructions.           </div>	
Authorized Representative:	
Prefix: <input type="text" value="Dr."/>	* First Name: <input type="text" value="Patrick"/>
* Middle Name: <input type="text"/>	
* Last Name: <input type="text" value="Collins"/>	
Suffix: <input type="text"/>	
* Title: <input type="text" value="Mayor"/>	
* Telephone Number: <input type="text" value="307-634-5100"/>	Fax Number: <input type="text"/>
* Email: <input type="text" value="mayor@wyvernity.org"/>	
* Signature of Authorized Representative: 	* Date Signed: <input type="text" value="12-26-24"/>

## CERTIFICATIONS

In accordance with the applicable statutes and the regulations governing the consolidated plan regulations, the jurisdiction certifies that:

**Affirmatively Further Fair Housing** --The jurisdiction will affirmatively further fair housing.

**Uniform Relocation Act and Anti-displacement and Relocation Plan** -- It will comply with the acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970, as amended, (42 U.S.C. 4601-4655) and implementing regulations at 49 CFR Part 24. It has in effect and is following a residential anti-displacement and relocation assistance plan required under 24 CFR Part 42 in connection with any activity assisted with funding under the Community Development Block Grant or HOME programs.

**Anti-Lobbying** --To the best of the jurisdiction's knowledge and belief:

1. No Federal appropriated funds have been paid or will be paid, by or on behalf of it, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement;
2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, it will complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions; and
3. It will require that the language of paragraph 1 and 2 of this anti-lobbying certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

**Authority of Jurisdiction** --The consolidated plan is authorized under State and local law (as applicable) and the jurisdiction possesses the legal authority to carry out the programs for which it is seeking funding, in accordance with applicable HUD regulations.

**Consistency with plan** --The housing activities to be undertaken with Community Development Block Grant, HOME, Emergency Solutions Grant, and Housing Opportunities for Persons With AIDS funds are consistent with the strategic plan in the jurisdiction's consolidated plan.

**Section 3** -- It will comply with section 3 of the Housing and Urban Development Act of 1968 (12 U.S.C. 1701u) and implementing regulations at 24 CFR Part 75.

  
\_\_\_\_\_  
Signature of Authorized Official

12-26-24  
\_\_\_\_\_  
Date

Mayor, CITY OF CHEYENNE  
\_\_\_\_\_  
Title

**Compliance with Anti-discrimination laws** -- The grant will be conducted and administered in conformity with title VI of the Civil Rights Act of 1964 (42 U.S.C. 2000d) and the Fair Housing Act (42 U.S.C. 3601-3619) and implementing regulations.

**Lead-Based Paint** -- Its activities concerning lead-based paint will comply with the requirements of 24 CFR Part 35, Subparts A, B, J, K and R.

**Compliance with Laws** -- It will comply with applicable laws.



Signature of Authorized Official

12-26-24

Date

Mayor, CITY OF CHEYENNE

Title

### Specific Community Development Block Grant Certifications



The Entitlement Community certifies that:

**Citizen Participation** -- It is in full compliance and following a detailed citizen participation plan that satisfies the requirements of 24 CFR 91.105.

**Community Development Plan** -- Its consolidated plan identifies community development and housing needs and specifies both short-term and long-term community development objectives that have been developed in accordance with the primary objective of the CDBG program (i.e., the development of viable urban communities, by providing decent housing and expanding economic opportunities, primarily for persons of low and moderate income) and requirements of 24 CFR Parts 91 and 570.

**Following a Plan** -- It is following a current consolidated plan that has been approved by HUD.

**Use of Funds** -- It has complied with the following criteria:

**1. Maximum Feasible Priority.** With respect to activities expected to be assisted with CDBG funds, it has developed its Action Plan so as to give maximum feasible priority to activities which benefit low- and moderate-income families or aid in the prevention or elimination of slums or blight. The Action Plan may also include CDBG-assisted activities which the grantee certifies are designed to meet other community development needs having particular urgency because existing conditions pose a serious and immediate threat to the health or welfare of the community, and other financial resources are not available (see Optional CDBG Certification).

**2. Overall Benefit.** The aggregate use of CDBG funds, including Section 108 guaranteed loans, during program year(s) 2023, 2024 [a period specified by the grantee of one, two, or three specific consecutive program years], shall principally benefit persons of low and moderate income in a manner that ensures that at least 70 percent of the amount is expended for activities that benefit such persons during the designated period.

**3. Special Assessments.** It will not attempt to recover any capital costs of public improvements assisted with CDBG funds, including Section 108 loan guaranteed funds, by assessing any amount against properties owned and occupied by persons of low and moderate income, including any fee charged or assessment made as a condition of obtaining access to such public improvements.

However, if CDBG funds are used to pay the proportion of a fee or assessment that relates to the capital costs of public improvements (assisted in part with CDBG funds) financed from other revenue sources, an assessment or charge may be made against the property with respect to the public improvements financed by a source other than CDBG funds.

In addition, in the case of properties owned and occupied by moderate-income (not low-income) families, an assessment or charge may be made against the property for public improvements financed by a source other than CDBG funds if the jurisdiction certifies that it lacks CDBG funds to cover the assessment.

**Excessive Force** -- It has adopted and is enforcing:

1. A policy prohibiting the use of excessive force by law enforcement agencies within its jurisdiction against any individuals engaged in non-violent civil rights demonstrations; and
2. A policy of enforcing applicable State and local laws against physically barring entrance to or exit from a facility or location which is the subject of such non-violent civil rights demonstrations within its jurisdiction.

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CITY OF CHEYENNE  
**CERTIFICATIONS**  
CITY OF CHEYENNE

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2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, it will complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions; and
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**Section 3** -- It will comply with section 3 of the Housing and Urban Development Act of 1968 (12 U.S.C. 1701u) and implementing regulations at 24 CFR Part 75.

  
\_\_\_\_\_  
Signature of Authorized Official

1-30-25  
\_\_\_\_\_  
Date

Mayor, CITY of CHEYENNE  
\_\_\_\_\_  
Title