

NIOBRARA COUNTY

CHAPTER ONE

DEMOGRAPHIC AND ECONOMIC TRENDS

1.1 LOCATION

Niobrara County, Wyoming is situated in east central Wyoming along Wyoming’s eastern boundary. The county borders South Dakota and Nebraska. The county seat of Lusk is situated located about 55 miles east of the City of Douglas, Wyoming (Figure 1-1).

1.2 POPULATION SIZE AND GEOGRAPHICAL DISTRIBUTION

The resident population of Niobrara County included 2,407 residents in April 2000 (Table 1-1). The county seat of Lusk contained about 60 percent of the county population. The communities of Manville and Van Tassell comprised almost five percent of the county population.

The remaining 35 percent of the resident population resided in various parts of the unincorporated area of Niobrara County. Within the unincorporated area, there are several smaller concentrations of residents in the vicinity of unincorporated communities such as Keeline, Node and Lance Creek.

1.3 RECENT POPULATION GROWTH

Available natural growth and driver license surrender data for Niobrara County provides some insights concerning recent population growth. The number of births and deaths in Niobrara County that occurred from May 2000 through December 2005 represents a net decline of 51 persons (Table 1-2).

Available drivers license surrender data, which provides a general indication of in and out-migration, suggests a net migration of approximately 96 residents into Niobrara County from May 2000 through December 2005 (Table 1-3). It is important to note that this data does not reflect the in or out-migration of persons less than 16 years of age. Consequently, actual net migration to Niobrara County represents a greater number of incoming residents.

Available driver’s license surrender data for 2005 indicates that more recent migration into Niobrara County is very limited. Some positive net migration includes persons in the 46-54 and 65+ year old age groups. While net migration into the county is limited, those moving in appear to be more mature members of the primary working age population. Secondly, some additional in-migration is evident from a limited number of retirees.

Lusk	1,447	60.1
Manville	101	4.2
Van Tassell	18	0.7
Unincorporated Area	841	34.9
Niobrara County	2,407	100.0
Source: U.S. Census Bureau, 2000.		

<i>Year</i>	<i>Births</i>	<i>Deaths</i>	<i>Natural Growth</i>
2000 ^(a)	24	33	-9
2001	16	20	-4
2002	13	29	-16
2003	20	31	-11
2004	15	16	-1
2005 ^(b)	22	32	-10
Total	110	161	-51
Notes: a) 2000 natural growth data includes births and deaths from May through December 2000 in order to correlate the data with U.S. Census estimates of April 2000; b) 2005 data estimated by Wyoming Department of Health.			
Source: Wyoming Department of Health, Bureau of Vital Statistics, 2006.			



Wyoming Workforce Child Care Needs Assessment

Regional Location Niobrara County

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Figure 1-1

<i>Year</i>	<i>Natural Growth</i>	<i>Net Migration</i>	<i>Population</i>
2000 ^(a)			2,407
2000 ^(b)	-9	18	2,416
2001	-4	35	2,447
2002	-16	5	2,436
2003	-11	21	2,446
2004	-1	-2	2,443
2005 ^(c)	-10	19	2,452
Total		96	
Notes: a) Population from April 2000 Census; b) 2000 natural growth data includes births and deaths from May through December 2000 in order to correlate the data with U.S. Census estimates of April 2000; c) 2005 data estimated by Pedersen Planning Consultants, 2006.			
Source: Wyoming Department of Health, Bureau of Vital Statistics, 2006.			

1.4 AGE CHARACTERISTICS

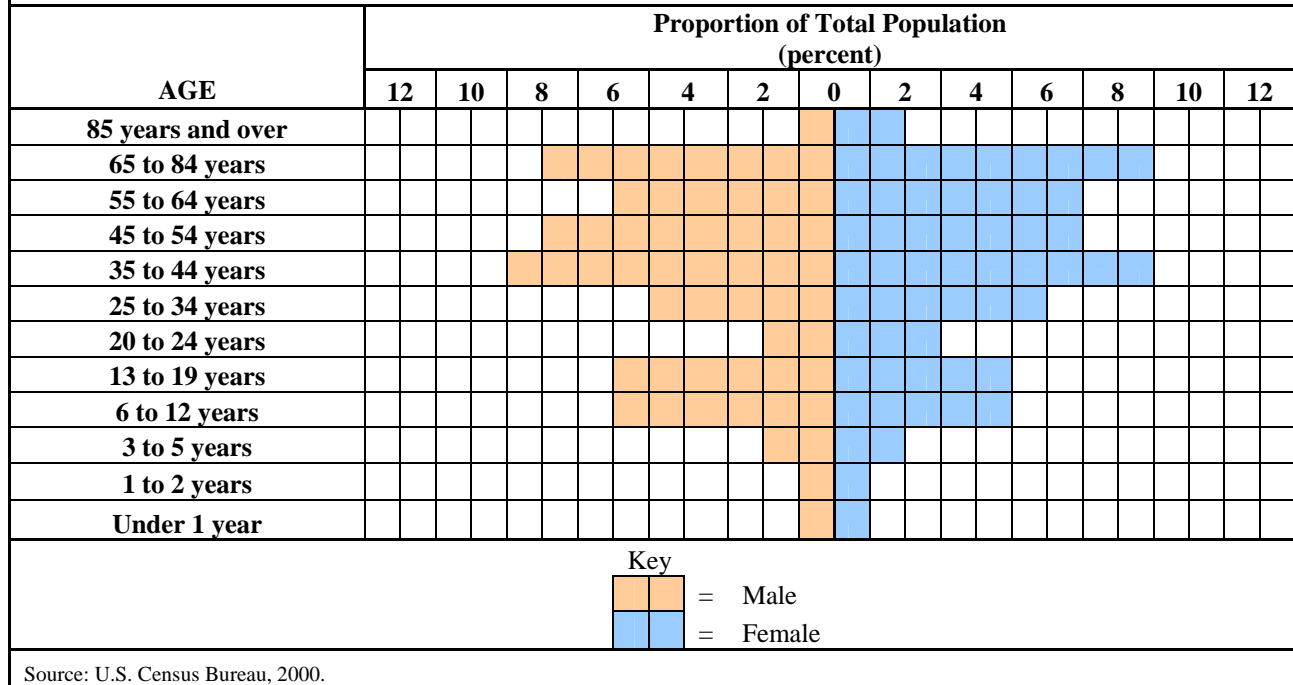
The age characteristics of the Niobrara County population in April 2000 provide some general insight to the size of the 0 to 12 year old age group that could potentially require some form of child care. In April 2000, children from 0 to 12 years of age included approximately 359 persons, or almost 15 percent of the total county population (Table 1-4 and Figure 1-2). The proportion of the 0 to 12 year old age group is generally comparable to the proportional size found in other smaller Wyoming counties.

<i>Age Group</i>	<i>Population</i>
Under 1 year	14
1 to 2 years	45
3 to 5 years	76
6 to 12 years	224
13 to 19 years	243
20 to 24 years	88
25 to 34 years	226
35 to 44 years	399
45 to 54 years	346
55 to 64 years	295
65 to 84 years	390
85 years and over	61
Total	2,407
Source: U.S. Census Bureau, 2000.	

The age distribution of the county population also indicates some other trends important to the community. The primary working age population, which includes persons between 25 and 54 years of age, represented about 40 percent of the total population (Table 1-4). The proportional size of the working age population is comparable to many other smaller Wyoming communities.

Residents nearing or in their retirement years, who are over 54 years of age, comprised approximately 31 percent of the total resident population (Figure 1-2). This proportion is considerably greater than many smaller Wyoming communities and provides some indication that Niobrara County is attractive to some retirees.

**FIGURE 1-2
AGE CHARACTERISTICS
NIOBRARA COUNTY, WYOMING
APRIL 2000**



1.5 FAMILY AND HOUSEHOLD CHARACTERISTICS

In April 2000, there were 1,011 households within Niobrara County. About 67 percent of these households were family households, or households with children. Approximately four percent of the households (42 households) included single mothers, i.e., no husband present, residing with children under 18 years of age (U.S. Census Bureau, 2000).

The average household size in Niobrara County was 2.28 persons. The average size of families (households with children under 18 years of age) was 2.81 persons.

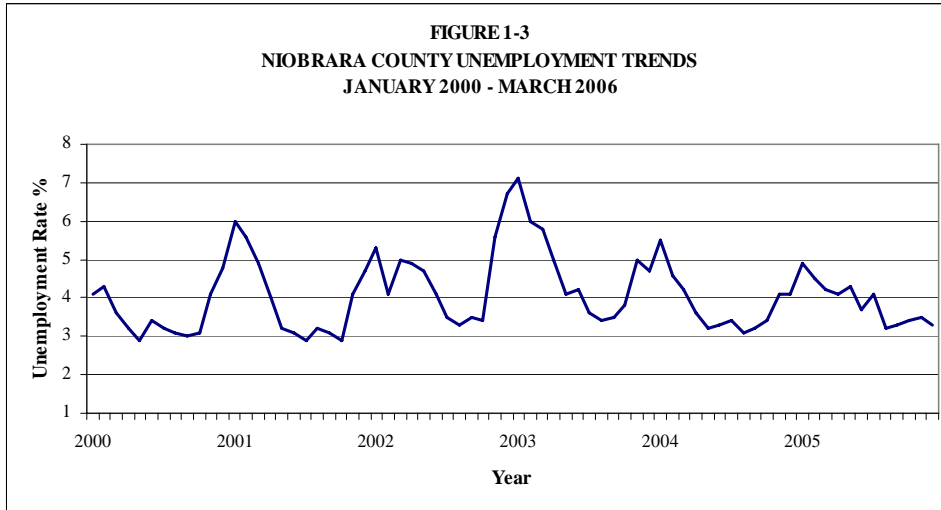
1.6 WORKFORCE TRENDS

1.6.1 Employed Workforce

In June 2006, the workforce of Niobrara County included 1,272 persons who were 16 years of age or older. About 1,235 residents of the county were employed at that time (Wyoming Department of Employment, 2006).

Unemployment rates in Niobrara County between 2000 and 2006 (Figure 1-3) ranged between 2.9 and 7.1 percent (Wyoming Department of Employment, Research and Planning Division, 2005). Higher unemployment rates were particularly evident in 1Q 2003.

Between 2000 and 2006, higher unemployment rates normally occurred from January through March. As seasonal job opportunities become available in agriculture, retail trade and accommodation and food services, unemployment rates decline.



Source: Wyoming Department of Employment, Research and Planning Division, 2005.

An economy that is characterized by an unemployment rate of three percent or less is generally considered to be “fully employed” as those persons, who wish to work, are actively working in the local economy (U.S. Census Bureau). In Niobrara County, “full employment” is close to being realized during the summer months.

1.6.2 Primary Sources of Employment

In 2004, economic activities in the Niobrara County economy generated employment in various industries (Table 1-5). The predominant sources of employment included:

- Government;
- Agriculture;
- Retail trade; and,
- Accommodations and food services.

Government jobs accounted for almost 21 percent of total full and part-time employment in 2004. This employment included jobs for various federal, state, county and municipal agencies.

The importance of agriculture to the Niobrara County economy is revealed, in part, through the amount of employment in this industry. In 2004, 20 percent of total full and part-time employment was associated with agricultural operations. Agriculture almost equaled the amount of government employment and surpassed the number of jobs in all private sector industries.

Retail trade accounted for almost 11 percent of total full and part-time employment in 2004. Retail trade services both local residents, as well as the seasonal influx of visitors in spring, summer and fall.

Almost eight percent of total full and part-time employment included jobs in accommodations and food services. When considered in the context of tourism, retail trade, accommodations and food services generate roughly 19 percent of total full and part-time employment. Consequently, tourism represents an important economic activity within Niobrara County.

**TABLE 1-5
TOTAL FULL AND PART-TIME EMPLOYMENT
NIOBRARA COUNTY, WYOMING
2001 - 2004**

<i>Employment Sector</i>		<i>2001</i>	<i>2002</i>	<i>2003</i>	<i>2004</i>
		<i>Number of Jobs</i>			
Wage and Salary Employment		985	978	961	942
Proprietors' Employment		707	701	709	728
	Farm Proprietors	265	269	263	263
	Nonfarm Proprietors	442	432	446	465
TOTAL FULL AND PART-TIME JOBS		1,692	1,679	1,670	1,670
Farm		345	352	340	342
Private Employment		1,013	991	990	979
	Forestry, Fishing, Related Activities, and Other	(D)	(D)	(D)	(D)
	Mining	(D)	(D)	(D)	(D)
	Utilities	(D)	(D)	(D)	(D)
	Construction	(D)	(D)	(D)	(D)
	Manufacturing	(D)	(D)	(D)	(D)
	Wholesale Trade	38	29	(D)	(D)
	Retail Trade	186	177	176	(D)
	Transportation and Warehousing	(D)	(D)	97	101
	Information	14	(D)	(D)	13
	Finance and Insurance	31	38	36	36
	Real Estate and Rental and Leasing	55	68	71	70
	Professional and Technical Services	(D)	(D)	55	55
	Management of Companies and Enterprises	0	0	0	0
	Administrative and Waste Services	(D)	(D)	16	17
	Educational Services	(L)	(L)	(L)	(L)
	Health Care and Social Assistance	59	74	78	81
	Arts, Entertainment, and Recreation	20	(L)	(L)	10
	Accommodation and Food Services	142	132	133	129
	Other Services, Except Public Administration	65	(D)	(D)	70
Government and Government Enterprises		334	336	340	349
	Federal, civilian	24	25	25	25
	Military	13	13	12	13
	State Government	(D)	(D)	(D)	(D)
	Local Government	(D)	(D)	(D)	(D)
TOTAL FARM, PRIVATE AND GOVERNMENT EMPLOYMENT		1,692	1,679	1,670	1,670

Notes: (D) - Not shown to avoid disclosure of confidential information, but the estimates for this item are included in the total number of jobs. (L) - Less than 10 jobs, but the estimates for this item are included in the total number of jobs.

Source: U.S. Department of Commerce, Bureau of Economic Analysis, Regional Economic Information System, 2006.

1.7 INDUSTRY TRENDS

1.7.1 Agriculture

There were 243 farms and ranches in Niobrara County in 2002. These agricultural operations operated on an average of 7,555 acres of land (U.S. Department of Agriculture, National Agricultural Statistics Service, 2004). Important agricultural activities include cattle production, as well as the production of hay and winter wheat (U.S. Department of Agriculture, National Agricultural Statistics Service, 2006).

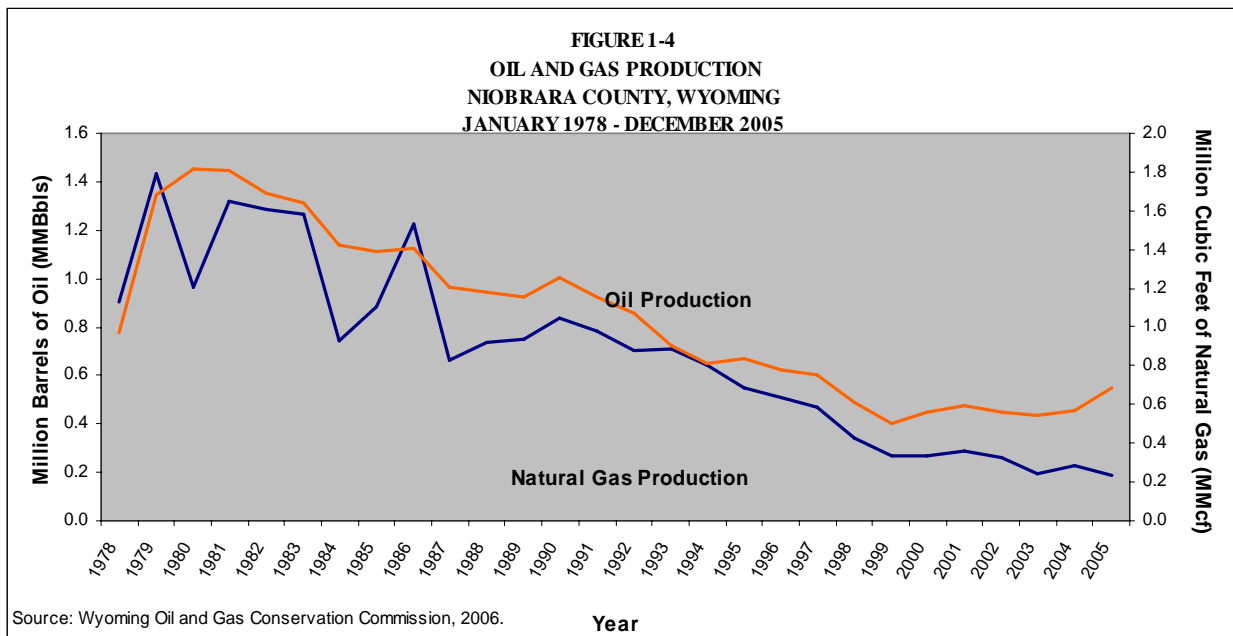
Employment within the agricultural industry in Niobrara County is expected to remain generally stable during the next decade. No significant efforts are being made by the community or outside investors to encourage the utilization of larger tracts of agricultural lands for other land uses. The lack of demand for these lands will likely encourage farmers and ranchers to sustain and improve existing agricultural operations.

1.7.2 Oil and Gas

While significant natural gas exploration and production is taking place in the Powder River Basin, natural gas and oil production in Niobrara County has experienced a long-term decline since the early 1980s (Figure 1-4). In 2006, there were 45 oil producers and 18 natural gas producers operating in Niobrara County (Wyoming Oil and Gas Conservation Commission, 2006).

Natural gas production in Niobrara County has steadily declined since the late 1980's. Annual production in 2005 was about 0.23 million cubic feet (MMcf).

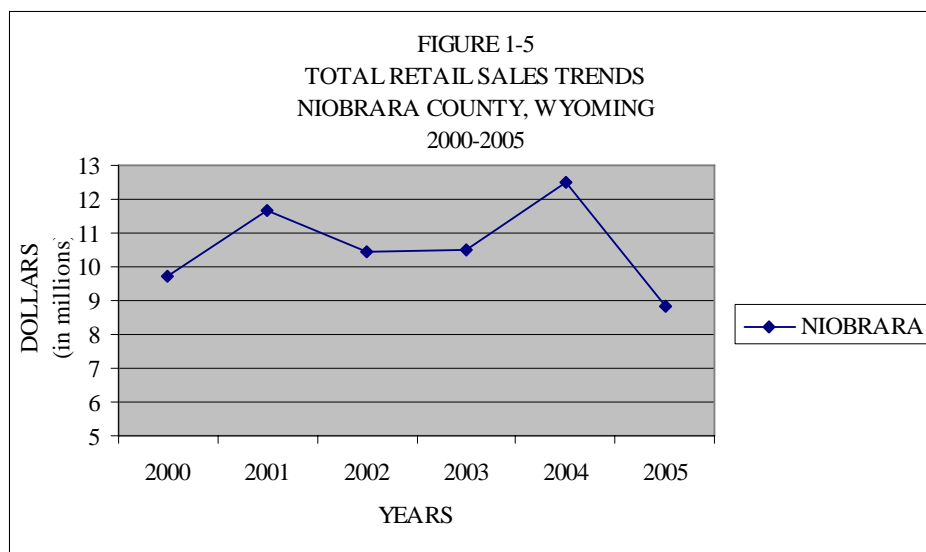
More recently, a significant increase in natural gas production occurred in January 2006 when natural gas production rose from 0.029 million cubic feet (MMcf) in December 2005 to 0.129 MMcf in January 2006. This increase extended from January through May 2006, but began to decline in June 2006 (U.S. Department of Agriculture, National Agricultural Statistics Service, 2004). This increase may be the result of some recent natural gas exploration in the West Anthills Prospect in Niobrara County (Cantex Energy, Inc., 2006).



Employment associated with natural gas production in Niobrara County is expected to remain stable during the next decade. Niobrara County residents working in the natural gas industry would need to drive a considerable distance from Niobrara County to natural gas and exploration projects in the Powder River Basin. Consequently, Niobrara County is not expected to be a place of residence of gas exploration and production personnel that will work in the Powder River Basin.

1.7.3 Retail Trade

Between 2000 and 2005, retail sales rose from roughly \$9.7 million to about \$12.5 million in 2004 (Figure 1-5). The growth in retail sales primarily reflects significant increases in retail expenditures for building materials and hardware, as well as miscellaneous retail items (Table 1-6). The rise of expenditures for these types of retail merchandise was offset somewhat by declining retail expenditures for apparel and accessories, auto dealer and gas services, and general merchandise.



Source: Wyoming Department of Revenue, 2005.

TABLE 1-6
RETAIL SALES TRENDS
NIOBRARA COUNTY, WYOMING
2000 - 2004

<i>Merchandise Group</i>	<i>Total Retail Sales</i>					<i>Percent Change</i>
	<i>2000</i>	<i>2001</i>	<i>2002</i>	<i>2003</i>	<i>2004</i>	
Building Material and Hardware	773,082	1,540,263	1,057,961	830,958	1,676,097	117
General Merchandise	139,415	154,028	122,804	65,062	131,383	-6
Food Stores	2,732,127	2,860,247	2,867,999	2,903,303	2,899,314	6
Auto Dealer and Gas Services	2,736,443	3,302,408	2,750,167	2,824,045	2,296,005	-16
Apparel and Accessory	26,878	17,578	10,734	18,702	18,477	-31
Home Furnishings	145,288	129,550	182,119	201,671	183,126	26
Restaurants	1,779,350	1,787,397	1,693,171	1,757,406	2,314,304	30
Miscellaneous Retail	1,375,347	1,885,387	1,748,226	1,923,950	2,963,502	115
Total Retail Trade	9,707,930	11,676,858	10,433,182	10,525,096	12,482,209	29

Source: Wyoming Department of Revenue, 2005.

Future growth of retail trade in Niobrara County will be generated primarily from nominal increases in residential population that will be derived from natural growth and in-migration. The extent of growth in future retail trade will depend largely upon the quality of services provided, the availability of workers, as well as the type and cost of merchandise that is carried by local merchants.

1.8 WORKER COMMUTER PATTERNS

In April 2000, approximately 93 percent of the employed workforce in Niobrara County commuted to jobs inside of Niobrara County. Less than one percent did not commute to work (Table 1-7).

Over three percent of the employed workforce commuted jobs in the neighboring Wyoming counties of Converse, Weston, Goshen and Platte. The remaining workforce commuted to jobs in Jefferson County, Nebraska, or other locations within and outside of Wyoming.

Other Census data indicates that 113 residents worked at home in 2000 (U.S. Census Bureau, 2000).

TABLE 1-7 NIOBRARA COUNTY WORKER COMMUTER PATTERNS BY COUNTY OF WORKPLACE APRIL 2000		
<i>Location of Work Place</i>	<i>Number of Workers</i>	<i>Proportion of Employed Workforce (percent)</i>
Niobrara	1,067	92.5
Converse	13	1.1
Weston	12	1.0
Goshen	9	0.8
Platte	7	0.6
Jefferson County, Nebraska	6	0.5
Other Locations	33	2.9
Commuting Workers	1,147	99.5
Non-Commuting Workers	6	0.5
Total	1,153	100.0
Source: U.S. Census Bureau, 2003.		

1.9 COST OF LIVING

The cost-of-living in Niobrara County is less expensive than most counties in Wyoming. Overall consumer costs are considerably less than the statewide average (Table 1-5).

In 4Q 2005, housing costs in Niobrara had an index of 78 which is significantly lower than the statewide average. Food costs, as well as recreation and personal care costs, were somewhat lower. In contrast, apparel costs were considerably higher than the statewide average. Transportation and medical costs in Niobrara were only slightly above the statewide average.

**TABLE 1-8
WYOMING COMPARATIVE COST OF LIVING INDEX
FOURTH QUARTER 2005
(STATEWIDE AVERAGE - 100)**

<i>County</i>	<i>Index Number by Category</i>						
	<i>All Items</i>	<i>Food</i>	<i>Housing</i>	<i>Apparel</i>	<i>Transportation</i>	<i>Medical</i>	<i>Recreation & Personal Care</i>
Teton	139	104	173	127	105	111	108
Sublette	112	102	118	125	101	99	114
Sheridan	105	109	103	129	98	109	105
Campbell	104	103	108	98	101	95	102
Lincoln-Afton	103	94	107	101	101	103	106
Laramie	103	109	108	86	98	99	93
Albany	102	90	107	103	100	101	99
Sweetwater	102	99	104	95	101	104	98
Johnson	100	108	95	136	100	91	98
Natrona	98	99	96	100	100	95	103
Carbon	96	103	91	90	101	105	100
Park	95	100	90	101	100	103	99
Fremont	94	92	89	90	102	101	104
Converse	93	95	88	87	100	98	104
Uinta	93	93	90	94	99	93	94
Hot-Springs	91	108	76	121	101	103	96
Lincoln-Kemmerer	90	89	83	100	100	88	111
Crook	90	92	81	112	101	94	100
Platte	90	100	78	105	99	106	101
Big Horn	89	96	77	118	100	99	102
Niobrara	89	94	78	109	102	101	94
Washakie	88	95	73	115	100	101	106
Goshen	88	91	78	93	99	104	96
Weston	86	87	76	92	100	102	99

Source: State of Wyoming, Department of Administration and Information, Economic Analysis Division, 2006.

NIORARA COUNTY

CHAPTER TWO

AVAILABLE CHILD CARE SERVICES

2.1 GENERAL

Title 14, Chapter 4, of the Wyoming Statutes requires child care facilities in Wyoming to be certified by the Wyoming Department of Family Services. At the same time, Title 14 also recognizes and exempts various types of child care facilities.

2.1.1 Licensed Facilities

There are three different types of licensed child care facilities in Wyoming:

1. A family child care home (FCCH) is a home of a child care provider that is used concurrently to provide child care for part of a day for 3 to 10 children.
2. A family child care center (FCCC) is a facility used to provide child care for 3 to 15 children, for part of a day, in a residential or commercial structure.
3. A child care center (CCC) is a facility used for part of a day to provide child care for 16 or more children (Wyoming Department of Family Services, 2005).

In addition to the three types of facilities described above, some child care centers (CCC) and family child care centers (FCCC) provide services in more than one facility. These child care facilities are identified as a multiple location facility child care center (MLFCCC) and a multiple location facility family child care center (MLFFCCC).

Licensed child care facilities are required to operate under the administrative rules of the Wyoming Department of Family Services. The administrative rules are outlined in Chapters 1 through 12 of the Wyoming Department of Family Service administrative rules for certification of child care facilities.

2.1.2 Exempt Facilities

There are several possible exemptions to the licensing of a child care operation. However, an individual may claim no more than one of the following possible exemptions:

1. The care of a child is made by a legal parent or legal relative.
2. Child care is occasionally provided by a neighbor or friend of the child's parents.
3. Parents cooperatively exchange child care.
4. Child care is provided by a person employed who comes to the home of a child's parents or guardian.
5. Child care services within a facility are provided to not more than two unrelated children.
6. Child care facilities that are supervised by the State of Wyoming, local government, a school district, agency or other political subdivision.
7. Child care facilities that provide care to the children of only one immediate family unit (Wyoming Department of Family Services, 2005).

If two or more of the preceding potential exemptions pertain to a particular child care operation, then the facility must be licensed by the Wyoming Department of Family Services.

2.1.3 Illegal Facilities

These child care facilities, which are privately operated by local residents, provide child care to more than two unrelated children. Further, they have no license to operate from the Wyoming Department of Family Services.

Any non-exempt child care facility that operates without certification from the Wyoming Department of Family Services is operating illegally. These facilities can be fined between \$50 and \$200 per day for each day that it operates without certification (Wyoming Department of Family Services, 2005).

2.2 CHILD CARE IN NIOBRARA COUNTY, WYOMING

2.2.1 Type and Location of Facilities

2.2.1.1 Licensed Child Care Facilities

Seven licensed child care facilities were operating in Niobrara County during the second quarter of 2006 (Table 2-1). All child care facilities were located in Lusk.

2.2.1.2 Exempt Child Care Facilities

Lusk Elementary and Middle School was the only exempt child care facility operating in Niobrara County in the second quarter of 2006 (Table 2-1).

2.2.1.3 Illegal Child Care Facilities

When the Wyoming Department of Family Services (WDFS) becomes aware of a potential illegal operation, the regional licensing representative typically visits the facility and informs the operator of applicable Wyoming State statutes and related administrative rules associated with the certification of child care facilities. The licenser provides the operator with appropriate forms and other related information to become licensed, and tries to assist those operators who are sincerely interested in becoming licensed.

2.2.2 Available Child Care Services and Enrollment

2.2.2.1 Available Services

Licensed and exempt child care facilities in Niobrara County provide child care for four age groups. These include:

1. infant care for children ranging from birth to 12 months of age;
2. toddlers between 1 and 3 years of age;
3. preschool for children from 3 through 5 years of age;
4. school age children from 6 through 12 years of age.

A total of 189 children were enrolled in licensed and exempt child care facilities in Natrona County during the second quarter of 2006 (Table 2-1). Approximately 181 children were enrolled in licensed facilities during this time period. More than 8 children were enrolled in exempt facilities,

**TABLE 2-1
CAPACITY, ENROLLMENT, AND HOURS OF OPERATION
CHILD CARE FACILITIES
NIOBRARA COUNTY, WYOMING
SECOND QUARTER 2006**

No.	Location/Facility	Hours of Operation Mon through Fri except holidays unless specified otherwise	^{a)} WDFS Type	^{a)} WDFS Capacity	Total Enrollment	Infants Birth to 12 months	Toddler 12 to 36 months	Preschool 3 to 5 years	School Age 6 to 12 years
Lusk									
1	Hammertime for Kids	5:00 am-11:00 pm	FCCC	15	36	1	6	14	15
2	Hammertime for Kids Too	7:00 am-7:00 pm	FCCC	15	11	1	3	5	2
3	Lusk Early Childhood	8:30 am-12:30 pm	CCC	49	98	NP	NP	98	NP
4	Lusk Elem & Middle School, K-8	after school till 5:30 pm	Exempt	NP	8	NP	NP	NP	8
5	The Kid's Place	N/A	FCCC	13	10	1	4	4	1
6	Valerie's child care home	N/A	FCCH	10	11	1	3	5	2
7	Unnamed family child care home	7:00 am-5:00 pm	FCCH	10	15	2	2	5	6
8	New childcare center	7:00 am-5:00 pm	FCCH	10	0	0	0	0	0
Lusk Subtotals				122	189	6	18	131	34
NIOBRARA COUNTY TOTALS				122	189	6	18	131	34
Notes: a) WDFS-State of Wyoming, Department of Family Services; CCC-Child Care Center; FCCC-Family Child Care Center; FCCH-Family Child Care Home. NP - Not Applicable. N/A - Not Available.									
Sources: Children and Nutrition Services (CNS), 2006; Pedersen Planning Consultants, 2006.									

2.2.2.2 Infant Care

There were six infants enrolled in licensed and exempt child care facilities in Niobrara County in the second quarter of 2006 (Table 2-1). Infant enrollment represented about three percent of total child care enrollment in Niobrara County.

2.2.2.3 Toddler Care

In the second quarter of 2006, 18 toddlers were enrolled in licensed and exempt child care facilities in Niobrara County (Table 2-1). Toddlers represented almost 10 percent of the total child care enrollment in Niobrara County.

2.2.2.4 Preschool Care

The preschool age group represented about 69 percent of the total child care enrollment in Niobrara County in 2Q 2006. The 131 enrolled preschoolers represented the largest enrollment of the four child care age groups (Table 2-1).

2.2.2.5 School Age Care

Licensed and exempt child care facilities in Niobrara County provided school age care for more than 34 children from 6 through 12 years of age (Table 2-1). School age care represented approximately 18 percent of the total child care enrollment in Niobrara County.

The only exempt child care center, Lusk Elementary and Middle School, offers Lights On Afterschool activities for children in Kindergarten through Grade 8 every school day. Approximately 8 children participate in this program.

2.2.3 Authorized Facility Capacity

The facility capacity authorized by the Wyoming Department of Family Services (WDFS) is the number of children that can be served at any given time of the day. Because many parents use child care services on a part-time or hourly basis for selected days of the week, licensed child care facilities in Niobrara County provide service to a greater number of children.

In 2Q 2006, for example, the cumulative facility capacity of licensed child care facilities in Niobrara County suggested a maximum enrollment of up to 122 children. Yet, the actual enrollment included more than 181 children in licensed facilities. Consequently, licensed child care facilities in 2Q 2006 legally served an enrollment of more than 48 percent over the authorized facility capacity.

2.2.4 Hours of Operation

Child care facilities in Niobrara County typically operate Monday through Friday (Table 2-1). In Niobrara County, two family child care homes operate from 7 am to 5 pm, or 10 hours per day, during week days. The two family child care centers have varying operating hours. One facility is open for 12 hours, i.e., 7 am to 7 pm, while the other offers 18 hours of service from 5 am to 11 pm.

Lusk Early Childhood provides two, 2-hour preschool classes, from 8:30 am to 12:30 pm, on weekdays.

Lusk Elementary School offers an after school program from the close of school until 5:30 pm on school days.

2.2.5 Planned Child Care Facilities

At the time of this report, no private investors or non-profit organization have announced plans for any new child care facility in Niobrara County. However, the Town of Lusk is pursuing a housing/child care study. No other specific information was available at the time of this report (Busch, 2006).

2.2.6 Cost of Child Care Services

2.2.6.1 General

The average costs of child care services in Niobrara County are presented in Table 2-2. It should be noted that average daily care costs provide only a general picture of child care costs. The cost of child care services are sometimes discounted as some child care operators offer discounted rates for clients who bring more than one child to the child care facility. Most child care providers will also offer discounted weekly and monthly rates. In addition, some parents use child care services for only a few hours of the day and/or selected days of the week.

TABLE 2-2 AVERAGE DAILY CHILD CARE COSTS NIOBRARA COUNTY, WYOMING SECOND QUARTER 2006 (in dollars)				
	Infants Birth to 12 months	Toddler 12 to 36 months	Preschool 3 to 5 years	School Age 6 to 12 years
Niobrara County	20.00	17.04	16.72	16.72
Lusk	20.00	17.04	16.72	16.72
<small>Source: Children and Nutrition Services (CNS), 2006; Pedersen Planning Consultants, 2006.</small>				

Child care costs vary from \$16.72 to \$20.00 per day, and are largely dependent upon the age of children brought to a child care facility (Table 2-2). Variable staff:child ratios required by the Wyoming Department of Family Services significantly influence the cost of delivering child care services. Consequently, variable child care rates reflect the differences in required staffing, as well as other direct operational costs.

2.2.6.2 Infant Care

Infant care costs average \$20.00 per day in Niobrara County (Table 2-2). This rate is higher than the rate of care for other child age groups. Higher costs primarily reflect higher required staff-child ratios, a lower maximum allowable group size, an increased level of responsibility, and other direct operating costs.

2.2.6.3 Toddler Care

Somewhat lower costs for toddler care (\$17.04 per day) are offered in Niobrara County (Table 2-2). Staff:child ratios for toddler care are somewhat less than those required for infants. Maximum allowable group sizes are also larger, particularly for toddlers between 24 and 36 months of age.

2.2.6.4 Preschool Care

The average cost of child care for preschool children is \$16.72 per day. This service rates is somewhat lower than child care rates for infants and toddlers (Table 2-2). Staff-child ratios are considerably lower for both 3-year olds, as well as children that are 4 and 5 years of age. In addition, allowable maximum group sizes increase considerably.

2.2.6.5 School Age Care

School age children, between 6 and 12 years of age, are brought to some child care facilities for after-school care. These costs vary during the course of the year because of changing needs.

In the summer months, children on vacation from school may come to a child care facility on one or more days of the week. The average cost for the care of school age children in Niobrara County is \$16.72 per day (Table 2-2). The rate for school age care is typically lower than any of the other age groups.

There is no cost for school age children that participate in after school activities at public schools.

NIORARA COUNTY

CHAPTER THREE

ANTICIPATED CHILD CARE DEMAND

3.1 INTRODUCTION

The quantification of anticipated child care demands provides some insight concerning potential child care needs. Chapter Three presents anticipated demands for infant, toddler, preschool and school age care. Overall child care demands for the county are also correlated with child care enrollments in July 2006 to calculate the extent of unmet child care needs.

The general methodology used to calculate anticipated child care demands is described more fully in the Introduction section of the overall report.

3.2 RESIDENT POPULATION OF NIOBRARA COUNTY

The resident population of Niobrara County included an estimated 2,452 residents in 2005 (see Chapter One). The agricultural industry in Niobrara County is expected to remain generally stable during the next decade. Limited in-migration is expected to be derived from future employment associated with other industries, or other persons entering the community for retirement. In fact, some occasional net declines in population growth can be anticipated as a result of short-term declines in natural growth and/or increases in out-migration.

The application of these assumptions suggests that annual population growth rates will range between roughly -0.25 and +0.40 percent during the next decade. This anticipated growth would only slightly increase the size of the county’s resident population to about 2,477 persons in 2016 (Table 3-1).

3.3 FUTURE CHILD CARE DEMAND

3.3.1 Low End of the Anticipated Demand Range

The low end of the anticipated demand range suggests a growing demand for child care services in Niobrara County. It is anticipated that these demands will include, at least, 189 Niobrara County children in 2007. By 2016, these demands are expected to remain about the same, i.e., 190, children between 0 and 12 years of age (Table 3-2).

<i>Year</i>	<i>Population (persons)</i>	<i>Estimated Rate of Growth (percent)</i>
April 2000 Census	2,407	
2001	2,447	1.66
2002	2,436	-0.45
2003	2,446	0.41
2004	2,443	-0.12
2005 Base Year	2,452	0.36
2006	2,459	0.30
2007	2,461	0.10
2008	2,455	-0.25
2009	2,449	-0.25
2010	2,451	0.10
2011	2,458	0.30
2012	2,468	0.40
2013	2,473	0.20
2014	2,475	0.10
2015	2,476	0.05
2016	2,477	0.05

Source: Pedersen Planning Consultants, 2006.

3.3.2 High End of the Anticipated Demand Range

The high end of the demand range represents 104 Niobrara County children in 2007 and 2016 (Table 3-3). In contrast to almost all other Wyoming counties, the size of the high end demand is somewhat lower than the anticipated low-end demand. The high-end child care age demand is strongly influenced by:

1. the limited population growth anticipated for Niobrara County.
2. the lack of affordability to roughly 51 percent of Niobrara County households.
3. the intention or desire of some Niobrara County parents, i.e., 20 percent, to provide infant, toddler and school age care for their own children at home, or obtain those services from families or friends.
4. the desire of all parents to seek preschool care even if their children are cared for at home.

Consequently, the potential demand for child care services represents only 28 percent of the anticipated child care population from 0 through 12 years of age.

3.3.3 Types of Services

The greatest demand for child care services appears to be for school age children between 6 and 12 years of age. The demands for this age group are considerably more than the demands for infants, toddlers, and preschoolers because, on a comparative basis, it includes a much larger segment of the total county population (Table 3-4).

Child care demands for the 6 to 12 year old group are probably the most difficult to discern. Older children generally have more skills, abilities and experience that enable them to be more self-sufficient in the absence of their parents. Many children in this age are also involved in various organized after-school activities such as sports, girl scouts, and 4-H. Those children not participating in various after-school programs need some adult supervision to monitor, at least, the type and location of their after-school activities, as well as other children whom they may choose to spend time with.

More substantive demand is also evident for preschool children, or children from three through five years of age. A limited increase in demand is also anticipated for toddler and infant care, but these demands are considerably less than those expected for preschool care.

<i>Year</i>	<i>Anticipated Low-End Demand (children)</i>
2006	189
2007	189
2008	189
2009	188
2010	189
2011	189
2012	189
2013	190
2014	190
2015	190
2016	190

Source: Pedersen Planning Consultants, 2006.

<i>Year</i>	<i>Anticipated Child Care Population</i>	<i>(-) Children Receiving Other Means of Child Care</i>	<i>(-) Suppressed Demand Due to Affordability</i>	<i>(=) High-End Child Care Demand</i>
2006	367	74	189	104
2007	367	74	189	104
2008	366	74	189	103
2009	365	74	189	102
2010	365	74	189	102
2011	367	74	189	104
2012	368	75	190	103
2013	368	75	190	103
2014	368	75	190	103
2015	368	75	190	103
2016	369	75	190	104

Source: Pedersen Planning Consultants, 2006.

Year	Infant Child Care (birth to 12 months)		Toddler Child Care (12 to 36 months)		Preschool Child Care (3 to 5 years)		School Age Child Care (6 to 12 years)		Net Child Care Demand	
	Low End	High End	Low End	High End	Low End	High End	Low End	High End	Low End	High End
2006	6	3	18	10	131	38	34	53	189	104
2007	6	3	18	10	131	38	34	53	189	104
2008	6	3	18	10	131	38	34	52	189	103
2009	6	3	18	10	130	37	34	52	188	102
2010	6	3	18	10	131	37	34	52	189	102
2011	6	3	18	10	131	38	34	53	189	104
2012	6	3	18	10	131	38	34	52	189	103
2013	6	3	18	10	132	38	34	52	190	103
2014	6	3	18	10	132	38	34	52	190	103
2015	6	3	18	10	132	38	34	52	190	103
2016	6	3	18	10	132	38	34	53	190	104

Source: Pedersen Planning Consultants, 2006

3.3.4 Correlation of Anticipated Demand Range with Existing Facility Enrollment

The correlation of the anticipated child care demand range with 2006 facility enrollment (Table 3-5) provides insights to the extent of potential unmet child care needs in Niobrara County between 2007 and 2016. Potential unmet needs represent the number of children which, as of 2006, could not be served unless additional private and/or public investments are made for the expansion of existing facilities or the development of new child care facilities.

This correlation reveals that there is sufficient facility capacity in Niobrara County to support anticipated future child care needs during the next decade. If the potential demand in 2016 conservatively falls near a midpoint of the low and high ends of the anticipated unmet demand range (approximately -44 children), it can be concluded that the potential child care demands in Niobrara County do not warrant the development of additional child care facilities until one or more existing facilities discontinue operations.

Year	2006 Enrollment	Net Child Care Demand		Unmet Demand	
		Low End	High End	Low End	High End
2006	189	189	104	0	-85
2007	189	189	104	0	-85
2008	189	189	103	0	-86
2009	189	188	102	-1	-87
2010	189	189	102	0	-87
2011	189	189	104	0	-85
2012	189	189	103	0	-86
2013	189	190	103	1	-86
2014	189	190	103	1	-86
2015	189	190	103	1	-86
2016	189	190	104	1	-85

Source: Pedersen Planning Consultants, 2006.

NIOBRARA COUNTY

CHAPTER FOUR

ECONOMIC IMPORTANCE OF EXPANDED CHILD CARE SERVICES

4.1 GENERAL

The potential expansion of existing facilities and the development of new child care facilities in Niobrara County can generate significant economic benefits to the local economy. Potential employment in the child care industry creates new jobs and increased personal income for child care workers. The delivery of child care services also generates revenues to small business proprietors and other child care service providers.

Employment, personal income, and service revenues generated by the child care industry represent direct economic impacts. The direct economic impact of the child care industry in 2006, as well as the potential impact of the industry in 2016, is discussed more fully in sections 4.2 through 4.4.

The child care industry also generates indirect economic impacts upon other industries that serve the child care industry, e.g., retail trade, in the Wyoming economy. These industries provide goods and services that child care providers purchase to deliver child care services.

Employment and income that are created in the child care industry and other industries serving the child care industry further generate personal expenditures in other industries of the Wyoming economy. These expenditures also create more jobs and income. These economic impacts are referred to as induced economic impacts.

The methodology used to calculate the anticipated amount of direct employment, personal income generation and child care service revenues is summarized in the Introduction section of the overall report. The indirect and induced impacts associated with the child care industry in 2006, as well as the potential impact of the industry in 2016, are presented on a statewide basis in the Executive Summary.

4.2 DIRECT ECONOMIC IMPACTS

4.2.1 Anticipated Direct Employment

The analysis of potential direct employment considers and identifies the anticipated number of child care jobs that would be needed to address future child care demands. Anticipated staff requirements include those jobs needed to support the operation of child care centers, family child care centers, and family child care homes.

The estimated amount of direct employment that could be derived from anticipated child care demands in Niobrara County could generate the development of 18-21 child care jobs in 2007. The anticipated number of jobs annually required, between 2007 and 2016, is expected to remain about the same (Table 4-1). This assumes, however, that existing facilities will remain in operation during the next decade.

**TABLE 4-1
ANTICIPATED CHILD CARE STAFF REQUIREMENTS
NIOBRARA COUNTY, WYOMING
2006 - 2016**

Year	Teachers		Assistant Teachers		Classroom Aides		Full Time Directors		Net Staff Demand	
	Low End	High End	Low End	High End	Low End	High End	Low End	High End	Low End	High End
2006	14	9	5	4	1	5	1	0	21	18
2007	14	9	5	4	1	5	1	0	21	18
2008	14	9	5	4	1	5	1	0	21	18
2009	14	9	5	4	1	5	1	0	21	18
2010	14	9	5	4	1	5	1	0	21	18
2011	14	9	5	4	1	5	1	0	21	18
2012	14	9	5	4	1	5	1	0	21	18
2013	14	9	5	4	1	5	1	0	21	18
2014	14	9	5	4	1	5	1	0	21	18
2015	14	9	5	4	1	5	1	0	21	18
2016	14	9	5	4	1	5	1	0	21	18

Notes: Cumulative staff requirements include those needed to support child care centers, family child care centers, and family child care homes.

Source: Pedersen Planning Consultants, 2006.

4.2.2 Anticipated Personal Income Generation

The anticipated personal income generation that is expected from direct employment in Niobrara County's child care industry is presented in Table 4-2 and Table 4-3. The information presented in these statistical tables provides a range of potential income generation. Both low mean and high mean income data from 2Q 2006 were applied to the anticipated child care staff demand range to calculate the amount of potential wages that would be generated from the variable staff requirements.

**TABLE 4-2
ANTICIPATED PERSONAL INCOME GENERATION
FROM LOW MEAN ANNUAL WAGES
NIOBRARA COUNTY, WYOMING
2006 - 2016
(dollars)**

Year	Teachers		Assistant Teachers		Classroom Aides		Directors		Net Staff Demand	
	Low End	High End	Low End	High End	Low End	High End	Low End	High End	Low End	High End
2006	185,041	118,955	87,048	69,638	15,843	79,217	25,564	12,782	313,497	280,593
2007	185,041	118,955	87,048	69,638	15,843	79,217	25,564	12,782	313,497	280,593
2008	185,041	118,955	87,048	69,638	15,843	79,217	25,564	12,782	313,497	280,593
2009	185,041	118,955	87,048	69,638	15,843	79,217	25,564	12,782	313,497	280,593
2010	185,041	118,955	87,048	69,638	15,843	79,217	25,564	12,782	313,497	280,593
2011	185,041	118,955	87,048	69,638	15,843	79,217	25,564	12,782	313,497	280,593
2012	185,041	118,955	87,048	69,638	15,843	79,217	25,564	12,782	313,497	280,593
2013	185,041	118,955	87,048	69,638	15,843	79,217	25,564	12,782	313,497	280,593
2014	185,041	118,955	87,048	69,638	15,843	79,217	25,564	12,782	313,497	280,593
2015	185,041	118,955	87,048	69,638	15,843	79,217	25,564	12,782	313,497	280,593
2016	185,041	118,955	87,048	69,638	15,843	79,217	25,564	12,782	313,497	280,593

Source: Pedersen Planning Consultants, 2006.

**TABLE 4-3
ANTICIPATED PERSONAL INCOME GENERATION
FROM HIGH MEAN ANNUAL WAGES
NIOBRARA COUNTY, WYOMING
2006 - 2016
(dollars)**

Year	Teachers		Assistant Teachers		Classroom Aides		Directors		Net Staff Demand	
	Low End	High End	Low End	High End	Low End	High End	Low End	High End	Low End	High End
2006	263,258	169,237	95,160	76,128	19,904	99,522	36,377	18,188	414,700	363,076
2007	263,258	169,237	95,160	76,128	19,904	99,522	36,377	18,188	414,700	363,076
2008	263,258	169,237	95,160	76,128	19,904	99,522	36,377	18,188	414,700	363,076
2009	263,258	169,237	95,160	76,128	19,904	99,522	36,377	18,188	414,700	363,076
2010	263,258	169,237	95,160	76,128	19,904	99,522	36,377	18,188	414,700	363,076
2011	263,258	169,237	95,160	76,128	19,904	99,522	36,377	18,188	414,700	363,076
2012	263,258	169,237	95,160	76,128	19,904	99,522	36,377	18,188	414,700	363,076
2013	263,258	169,237	95,160	76,128	19,904	99,522	36,377	18,188	414,700	363,076
2014	263,258	169,237	95,160	76,128	19,904	99,522	36,377	18,188	414,700	363,076
2015	263,258	169,237	95,160	76,128	19,904	99,522	36,377	18,188	414,700	363,076
2016	263,258	169,237	95,160	76,128	19,904	99,522	36,377	18,188	414,700	363,076

Source: Pedersen Planning Consultants, 2006.

The anticipated personal income generation derived from low mean annual wages would generate an annual personal income of roughly \$0.3 million in 2007. By 2016, it is expected that personal income generation would continue to generate about \$0.3 million (Table 4-2).

When anticipated direct employment is applied to high mean annual wages, potential income generation in 2007 would annually generate about \$0.4 million. This level of cumulative per income generation would remain about the same in 2016 (Table 4-3).

The mid points of the low and high mean annual wages in 2016 suggest that annual personal income generation will increase between \$0.3 million and \$0.4 million during the next decade.

4.2.3 Child Care Service Revenues

In 2006, the child care industry of Niobrara County earned approximately \$0.5 million in revenues that were derived from the delivery of child care services. With the reduction in anticipated child care demands over the next ten years, child care service revenues are expected to decrease to roughly \$0.4 million in 2016 (Table 4-4).

**TABLE 4-4
ANTICIPATED CHILD CARE SERVICE REVENUES
NIOBRARA COUNTY
2006 and 2016
(In Dollars)**

<i>Child Care Group</i>	<i>2006</i>	<i>2016</i>
Infants (0 to12 months)	29,250	21,938
Toddlers (1 to 3 years)	74,763	58,149
Preschool (3 to 5 years)	355,927	230,945
School Age (6 to 12 years)	40,504	51,822
TOTAL COUNTY REVENUES	500,444	362,853

Source: Pedersen Planning Consultants, 2006.

4.3 INDIRECT AND INDUCED ECONOMIC BENEFITS

The indirect and induced impacts associated with the child care industry in 2006, as well as the potential impact of the industry in 2016, are presented on a statewide basis in the Executive Summary of this report.

4.4 EMPLOYEE RETENTION AND RECRUITMENT

An Employer Survey associated with the Wyoming Workforce Child Care Needs Assessment was distributed to employers throughout the state of Wyoming in June 2006. All employer representatives from Niobrara County, which responded to the Employer Survey between June and August 2006, reported that the availability of child care facilities had not hampered their company's ability to retain or recruit employees (Appendix A).

The expansion and development of new child care facilities in Niobrara County would only improve the future recruitment of company employees of both larger community employers and small businesses in Niobrara County. When the capacity of existing facilities is sufficient to meet future child care demands, employers can identify available child care facilities as a community asset to those individuals they desire to hire.

Expanded child care facilities would also influence the future retention of company and small business employees. The availability of a greater number of child care facilities would reduce the loss of employees that otherwise might be lost to the unavailability of child care facilities.