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**2012**  
**ALBANY COUNTY**  
**CHILD CARE NEEDS STUDY**

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**April 15, 2012**

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# CHAPTER ONE

## INTRODUCTION

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### 1.1 BACKGROUND

A Wyoming Workforce Child Care Needs Assessment was completed by Pedersen Planning Consultants in November 2006. The purpose of that study was to provide the State of Wyoming with greater insights concerning:

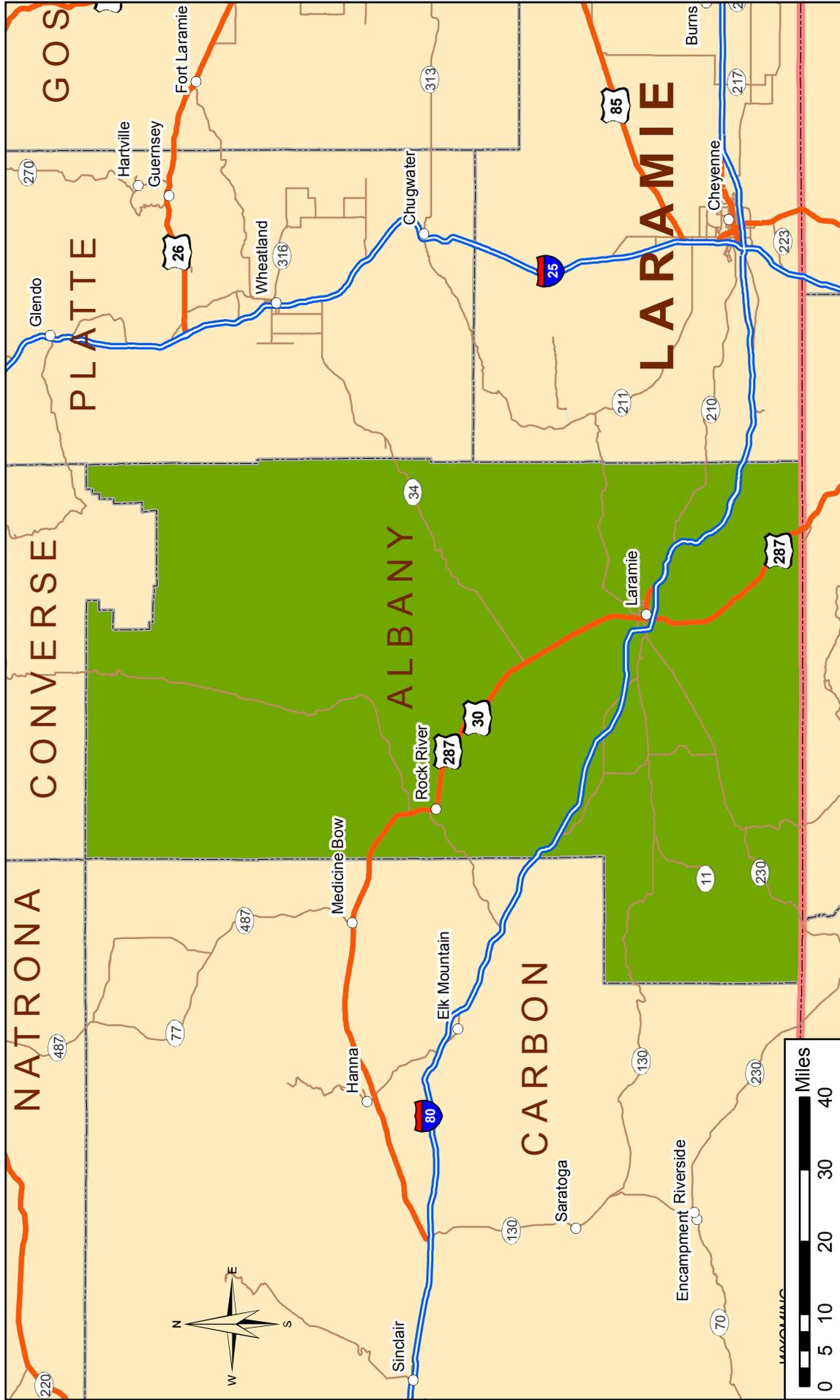
- County demographic and economic trends;
- child care enrollments and the cost of child care services;
- future demand for child care services;
- affordability of child care service rates and their impact upon child care demand;
- potential economic benefits that may be derived from the expansion or development of child care facilities; and,
- potential consequences generated from limited or no expansion of child care facilities.

This assessment included evaluations of all 23 Wyoming counties, as well as a statewide overview.

In 2009, the City of Laramie, Wyoming retained Pedersen Planning Consultants to update its 2006 assessment of child care demands in Albany County, Wyoming (Figure 1-1). The City of Laramie was contemplating its potential financial participation in a public-private partnership with Basic Beginnings, an established child care center in Laramie, that desired to expand its child care facilities and related services via construction of a new community facility. The 2009 Albany County Child Care Needs Study evaluated selected county demographic and economic trends, identified the number of available child care facilities, as well as determined recent changes in child care enrollments and the cost of child care services. Ultimately, PPC presented revised forecasts of resident population and the anticipated demand for child care for the 2010-2020 period. Anticipated demands were correlated with authorized facility capacities for existing child care facilities, planned facility expansions, as well as new planned child care facilities, to determine the extent of unmet demand for child care.

### 1.2 PURPOSE AND SCOPE

In early 2012, the University of Wyoming retained Pedersen Planning Consultant to update the 2009 Albany County Child Care Needs Study. The update was prompted by UW's consideration of developing an on-campus child care facility for employees and students of the University.



# Albany County Child Care Needs Study

# Albany County Regional Location

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Figure 1-1

The scope of this report is very comparable to the 2009 Albany County Child Care Needs study.

- Chapter One provides a brief description of relevant background concerning past assessments of child care needs in Albany County, outlines purpose and scope of the this more recent study, as well as identifies representatives of various public, private companies, and non-profit organizations who were consulted during preparation of this study.
- Chapter Two examines selected demographic and economic trends in Albany County that are expected to influence future child care demands.
- Chapter Three identifies and evaluates available child care services in Albany County, planned expansions of child care services, as well as trends associated with the cost of child care delivery.
- Chapter Four includes forecasts of child care demand that are expected between 2013 and 2022. Anticipated demands are correlated with authorized facility capacities for existing child care facilities, planned facility expansions, as well as new planned child care facilities, to determine the extent of unmet demand for child care.

### **1.3 CONSULTATION**

Representatives from a number of public and private agencies, as well as child care providers operating in Albany County, provided valuable insights to Pedersen Planning Consultants during the course of this study. These representatives included the following:

#### **Public Agencies**

*Wyoming Department of Administration and Information, Economic Analysis Division*  
Wenlin Liu, Senior Economist, Acting Administrator

*Wyoming Department of Family Services*  
Kristi Bennick, Child Care Licensing Manager, Albany County  
Michelle Weber, Deputy Administrator, Early Childhood Programs Division

#### **Private Agencies**

*Children and Nutrition Services, Inc.*  
Teresa Williams, Director, Child Care Finder, Northeast Wyoming Office, Sheridan,  
Wyoming

*Laramie Economic Development Corporation*  
Gaye Stockman, President/CEO, Laramie, Wyoming

## **Albany County Child Care Providers**

Jackie Aguilar, Laramie, Wyoming

Angela Armijo, Laramie, Wyoming

Mark Bittner, University of Wyoming Early Care and Education Center, Laramie, Wyoming

Judi Davis, Sunflower Childcare, Laramie, Wyoming

Kristine Dory, Little Tykes Day Care, Laramie, Wyoming

Barbara Fresquez, Indian Hills Daycare, Inc., Laramie, Wyoming

Nancy Herschel, Hilltop Christian Child Care, Inc., Laramie, Wyoming

Sarah at The Kids Connection, Laramie, Wyoming

Amanda Johnson, Johnson's Corner Daycare, Laramie, Wyoming

Amanda Knadler, Country Peas, Laramie, Wyoming

Mary Knight, Mary's Day Care, Laramie, Wyoming

Jan Lawrence, Basic Beginnings and Basic Beginnings South, Laramie, Wyoming

Maleta Mangan, Corthell Hill Daycare, Laramie, Wyoming

Bethel Medina, Medina Child Care, Laramie, Wyoming

Doris Mora, RJM Daycare, Laramie, Wyoming

Carol Nickell, The Cabbage Patch and Little Sprouts Child Care, Laramie, Wyoming

CheyAnne Nielson, Laramie, Wyoming

Carisse Brooks, Kiddie Cottage, Laramie, Wyoming

Karena Oyler, Karena's Corner, Laramie, Wyoming

Mary Reitsma, Reitsma Day Care, Laramie, Wyoming

Barbara Roxas, Montessori Children's House, Laramie, Wyoming

Karen Royce, Developmental Preschool and Day Care, Laramie, Wyoming

Jamie Salo, Jami's Day Care, Laramie, Wyoming

Julie Schriener, Julie's Home Daycare, Laramie, Wyoming

Samantha Seals, The Tot Spot, Laramie, Wyoming

Patricia Shearin, Pat's Day Care, Laramie, Wyoming

Jahn Smylie, Centennial Valley Preschool, Centennial, Wyoming

MaryAnn Stibitz, Granny's Place, Laramie, Wyoming

Cindy Stoffers, Laramie Community Recreation Center, Laramie, Wyoming

Marlene Swazzo, Laramie Child Development Corporation, Laramie, Wyoming

Patsy Thomas, Welcome to Grandma's House, Laramie, Wyoming

Jeannie Vasquez, Grandma Jeannie, Laramie, Wyoming

Aimee Walsh, The Ranch Preschool, Laramie, Wyoming

Anita at St. Laurence Preschool, Laramie, Wyoming

Ruth Williams, Puddle Ducks, Laramie, Wyoming

Jennifer Zook, The Open School, Laramie, Wyoming

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## CHAPTER TWO

### DEMOGRAPHIC AND ECONOMIC TRENDS

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#### 2.1 POPULATION

##### 2.1.1 Recent Population Growth

The U.S. Census Bureau reported a population of 36,299 residents in Albany County in April 2010. The population of Albany County, which added 4,285 residents between April 2000 and April 2010, grew roughly 13 percent during the previous decade.

Available natural growth and net migration data suggest that the resident population of Albany County increased to, at least, 657 persons through December 2011. Pedersen Planning Consultants estimates that Albany County population comprised approximately 36,956 residents in December 2011 (Table 2-1). This estimate is somewhat higher than the 36,889 residents in Albany County estimated by the Wyoming Department of Administration and Information, Economic Analysis Division, for July 1, 2011.

<b>TABLE 2-1 POPULATION GROWTH ALBANY COUNTY, WYOMING APRIL 2010 THROUGH 2011</b>			
<i>Year</i>	<i>Natural Growth</i>	<i>Net Migration</i>	<i>Population</i>
April 2010			a) 36,299
April 2010- December 2011	386	271	36,956
<b>Total</b>	b) 386	c) 271	
<small>Notes: a) Population reported by U.S. Census Bureau from April 2010 Census. b) Natural growth data includes births and deaths from May, 2010 through December 2011 in order to correlate the data with U.S. Census estimates of April 2000, as well as provisional births and deaths data for 2011. c) Net migration data reflects cumulative data from April 1, 2010 through June 30, 2011. This data is derived from federal tax returns.</small>			
<small>Source: U.S. Census Bureau, Population Division, 2012; Wyoming Department of Health, Rural and Frontier Health Division, Vital Statistics Services, 2012; Wyoming Department of Administration and Information, Economic Analysis Division, 2012; Pedersen Planning Consultants, 2012.</small>			

##### 2.1.2 Age Characteristics

One of several inputs to the statistical model used to calculate future child care demand is the proportional size of age groups for infants and toddlers, as well as preschool and school age children. Available data from the April 2010 Census provides the most reliable source for this information.

In April 2010, children from 0 to 12 years of age included approximately 4,472 persons, or about 12 percent of the total county population (Table 2-2). Within this overall age group, the proportional size of more specific age groups that could potentially be served by child care providers was as follows:

- Infants under one year of age (1.2 percent);
- One and two year old children (2.3 percent);
- Preschool age children from three to five years of age (3.0 percent); and,

- School age children, between six and 12 years of age (5.7 percent).

It is important to note that the number of children five years of age and younger increased approximately 22 percent between April 2000 and 2010. In contrast, children between six and 12 years of age declined about 5 percent.

## 2.2 WORKFORCE TRENDS

### 2.2.1 Employed Workforce

In December 2010, the potential labor force of Albany County included an estimated 19,593 residents who were 16 years of age or older. About 18,736 of these residents were employed within or outside of the Albany County economy (Wyoming Department of Workforce Services, Research and Planning Section, 2012).

A year earlier, the size of the potential workforce in December 2009 comprised a somewhat larger labor force of 19,704 residents who were 16 years of age or older. About 18,724 of these residents were employed within or outside of the Albany County economy (Wyoming Department of Workforce Services, Research and Planning Section, 2012).

### 2.2.2 Unemployment

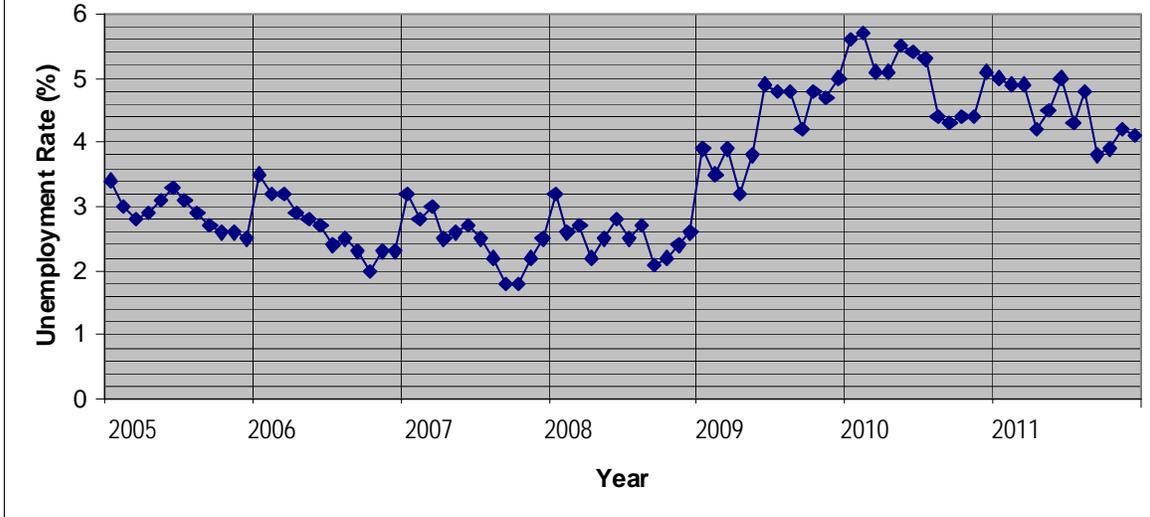
From 2000 through the end of 2008, unemployment rates in Albany County ranged and generally declined from 4.1 percent in January 2001 to 1.8 percent in September and October 2007. Since 2005, higher rates of unemployment typically occurred from January through June or July of each year; lower unemployment rates were more evident from July or August through December when more students were enrolled at the University of Wyoming (Figure 2-1). For example, a 3.2 percent unemployment rate in January 2008 gradually fell to 2.1 percent in September 2008 at the beginning of the fall school semester (Wyoming Department of Employment, Research and Planning Section, 2009).

The influence of the ongoing recession upon employment became clearly evident in June 2009 when the unemployment rate in Albany County rose to 4.9 percent. The rate of unemployment in June 2009 represented the highest rate of unemployment that Albany County experienced during the present decade (Figure 2-1).

Age Group	Population
Under 1 year	445
1 to 2 years	840
3 to 5 years	1,105
6 to 12 years	2,082
13 to 19 years	4,333
20 to 24 years	7,712
25 to 34 years	5,971
35 to 44 years	3,329
45 to 54 years	3,718
55 to 64 years	3,598
65 to 84 years	2,742
85 years and over	424
<b>Total:</b>	<b>36,299</b>

Source: U.S. Census Bureau, 2012.

**Figure 2-1  
Albany County Unemployment Rate  
January 2005 to December 2011**



Unemployment levels fell slightly to 4.2 percent in September and November 2009 with the return of a student population and anticipated increases in consumer expenditures. But, increased unemployment persisted between five and six percent during the first three quarters of 2010 and then declined to just above four percent the fourth quarter of 2010. Preliminary data suggests that unemployment rose and hovered at or near five percent during the first two quarters of 2011 and ranged between 3.8 and 4.5 percent for the remaining two quarters.

Increases in Albany County’s rate of unemployment are significant to the county economy because of their impact upon local household incomes. While troubling, the correlation of county unemployment rates with other Wyoming counties in 2009 and 2010 suggests that the recent recession impacted Albany County considerably less than other parts of Wyoming. The lower rate of unemployment experienced in Albany County was likely due to a higher proportion of jobs in the public sector where job losses were less prevalent than the private sector.

In 2009, the average annual unemployment rate in Albany County was 4.3 percent compared to statewide unemployment rate of 6.5 percent. Average annual unemployment rates were higher in each of Wyoming’s remaining 22 counties (Wyoming Department of Workforce Services, Research and Planning Section, 2012).

In 2010, Albany County’s average annual unemployment rate of 5.1 percent was considerably lower than the statewide unemployment rate of 7.0 percent. Sublette County was the only county in Wyoming that experienced a lower average annual unemployment rate at 4.6 percent.

### **2.2.3 Primary Source of Employment**

Available covered employment information confirms that the primary sources of employment in the Albany County economy continue to include:

- Government;
- Retail Trade;
- Accommodations and food services; and,
- Health care and social assistance services.

#### **2.2.3.1 *Government***

In 2010, government jobs comprised almost 39 percent of total full and part-time employment in Albany County (Wyoming Department of Workforce Services, Research and Planning Section and U.S. Bureau of Labor Statistics, 2012). This represents a slight decline from the average monthly employment in 2009 (Table 2-3). The reduction in government employment primarily reflected job losses with the State of Wyoming and nominal losses in federal and local government employment. Preliminary employment data for the first three quarters of 2011 suggest that some limited reductions in the number of government jobs occurred in 2011.

Wyoming experienced a short but severe recession that generated a statewide downturn in employment that generally extended between the fourth quarter of 2008 to the first quarter of 2010 (Liu, 2011). During this period, the government sector in Albany County did not experience any decline in employment until 2010. In contrast, the impact of the economic downturn reduced private sector jobs in Albany County in both 2009 and 2010.

State and local government employment in Albany County is expected to remain near 2011 levels despite the anticipated decline in severance tax revenues that are expected to be deposited into the State of Wyoming's General Fund through June 2014 (Consensus Revenue Estimating Group, 2012). Research opportunities associated with the scheduled operation of the National Center for Atmospheric Research Supercomputing Center may generate some modest increases in employment at the University of Wyoming campus in Laramie. Conversely, county and municipal agencies may continue to experience some modest declines in employment as a consequence of potential reductions in severance tax revenues being distributed to local governmental agencies in 2012 through 2014.

#### **2.2.3.2 *Retail Trade***

In 2010, retail trade provided an average monthly employment of 1,741 full and part-time jobs. These jobs represented almost 12 percent of total average monthly employment in Albany County (Table 2-3).

**TABLE 2-3  
COVERED AVERAGE MONTHLY EMPLOYMENT IN ALBANY COUNTY BY NAICS  
2001 through 2010**

	<u>NAICS Code<sup>a</sup></u>	2001 AME	2002 AME	2003 AME	2004 AME	2005 AME	2006 AME	2007 AME	2008 AME	2009 AME	2010 AME
<b>Total, Albany County</b>		14,321	14,545	14,933	9,689	9,860	15,172	15,377	15,602	15,683	15,169
<b>Private Sector</b>	<b>11 - 99</b>	<b>9,284</b>	<b>9,382</b>	<b>9,544</b>	<b>9,441</b>	<b>9,627</b>	<b>9,617</b>	<b>9,810</b>	<b>9,945</b>	<b>9,638</b>	<b>9,309</b>
Agriculture, Forestry, Fishing, & Hunting	11	81	81	74	81	77	ND	60	61	74	62
Mining	21	9	9	29	25	15	ND	17	22	21	25
Utilities	22	ND	32	31							
Construction	23	804	770	698	750	802	873	930	949	944	751
Manufacturing	31 - 33	634	633	612	580	556	609	549	456	374	324
Wholesale Trade	42	152	157	156	ND	ND	ND	ND	ND	138	145
Retail Trade	44 - 45	1,936	1,819	1,831	1,846	1,879	1,810	1,825	1,798	1,733	1,741
Transportation & Warehousing	48 - 49	ND	ND	ND	ND	ND	152	173	173	145	148
Information	51	146	ND	332	287	269	162	147	153	148	144
Finance & Insurance	52	375	397	421	416	417	429	432	443	437	439
Real Estate & Rental & Leasing	53	140	ND	157	162	187	187	202	199	186	165
Professional & Technical Services	54	1,056	783	801	716	802	856	904	888	818	767
Management of Companies & Enterprises	55	6	6	ND							
Administrative & Waste Services	56	208	236	ND							
Educational Services	61	ND	ND	399	394	394	392	327	293	308	328
Health Care & Social Assistance	62	ND	ND	1,106	1,135	1,179	1,185	1,184	1,518	1,592	1,605
Arts, Entertainment, & Recreation	71	207	218	222	175	153	155	148	155	157	156
Accommodation & Food Services	72	1,329	1,524	1,583	1,612	1,640	1,630	1,668	1,829	1,724	1,760
Other Services, except Public Administration	81	712	725	752	716	703	708	679	432	417	418
<b>Total Government</b>		<b>5,037</b>	<b>5,163</b>	<b>5,389</b>	<b>248</b>	<b>233</b>	<b>5,555</b>	<b>5,567</b>	<b>5,657</b>	<b>6,045</b>	<b>5,860</b>
Federal Government		252	269	259	248	233	215	204	198	209	200
State Government		3,105	3,154	3,340	ND	ND	3,522	3,515	3,596	3,945	3,788
Local Government		1,680	1,740	1,790	ND	ND	1,818	1,848	1,863	1,891	1,872

Notes:

<sup>a</sup> Industry codes established by the North American Industry Classification System.

AME: Average Monthly Employment

ND: Not Disclosable, data do not meet Bureau of Labor Statistics or State agency disclosures

Source: Quarterly Census of Employment and Wages developed by Wyoming Department of Workforce Services, Research & Planning Section, and the U.S. Bureau of Labor Statistics, 2012.

Reductions in consumer discretionary spending and retail sales during the recent and national recession fueled job losses in 2009 and 2010. However, results from a recent quarterly survey of larger corporate chief executive officers in American suggests that, in the short term, many larger corporations in America are expecting increased sales revenue, greater capital investments, and increased employment during, at least, the first quarter of 2012 (The Business Roundtable, 2012).

Future increases in retail trade employment will be derived from increased retail sales at existing retail outlets, as well as the establishment of new retail outlets in Albany County. An improving employment picture in Wyoming, as well as the prospects and rippling effect of rising sales and capital expenditures by larger U.S. corporations, suggests that Albany County will likely experience a nominal rise in retail trade employment through,

at least, 2012 and 2013. But, the expansion or establishment of more than a few retail stores in Albany County is not expected until private investors sense a more attractive business climate that is sustained over a longer period of time.

### **2.2.3.3      *Accommodation and Food Services***

Accommodation and food services employed almost 12 percent of all full and part-time employment in 2010. Similar to retail trade, the number of jobs associated with accommodation and food services declined in 2009 and rose only slightly in 2010. The decline of accommodation and food service jobs is, again, a consequence of falling discretionary expenditures by consumers in 2009 and 2010.

Renewed optimism for some growth in the national and regional Rocky Mountain economies suggests a modest increase in sales for both accommodation and food services in 2012 and 2013.

- Most of the accommodation expenditures in Albany County are probably associated with business travel, truck traffic, as well as other persons traveling along the Interstate 80 corridor.
- The anticipated rise in food service sales is expected to be modest. Food service revenues will continue be buoyed by sales to university students, faculty, and other governmental personnel.
- Local tourism officials in Albany County are making a renewed marketing focus upon business and recreational travelers that travel along the Interstate 80 corridor (Crew, 2012).

### **2.2.3.4      *Health Care and Social Assistance Services***

Employment in health care and social assistance services in Albany County provided an average monthly employment of 1,605 jobs in 2010. These jobs represented almost 11 percent of total full and part-time employment in Albany County in 2010 (Table 2-3).

In contrast to all other industries in the private sector other than agriculture, forestry, fishing and hunting services, employment in health care and social assistance services rose during the recent national and regional economic recession. This is not surprising as any increase in resident population typically increases the demand for health care. Between 2000 and 2010, the population of Albany County was increasing at the rate of about 1.3 percent per year.

Nominal population growth over the next decade can be expected to sustain demands for health care and social assistance services during the next 10 years. For this reason, jobs associated with the health care and social assistance industry are expected to rise through the remainder of the coming decade.

## 2.3 INDUSTRY TRENDS

### 2.3.1 General

The private sector of the Albany County economy primarily comprises service-based businesses involved in retail trade, accommodation and food services, as well as health care and social services. But, the private sector of the Albany County economy is heavily reliant upon the household incomes generated by federal, state and local governmental employment, as well as other public agency expenditures.

The long-standing need for greater economic diversification in the Albany County economy was recently addressed by three important governmental actions.

- The Wyoming Legislature passed a bill that would exempt data centers from sales and use taxes on computer software, special cooling equipment and power supplies if the total expenditures were, at least, \$2 million in a calendar year;
- Governor Mead budgeted \$14 million to help with infrastructure costs for data centers in Wyoming; and,
- The Albany County Commissioners approved a rezoning request for 160 acres of land north of Laramie which Verizon had acquired, via a two-year option to purchase, for the development of a mega data center (Leclair, 2011).

These and other incentives almost led Verizon to establish a mega data center that would have employed 150 to 200 persons (Stockman, 2012). Unfortunately, Verizon acquired Terremark Worldwide, a data storage company based in Miami, Florida that operated 13 storage centers in the United States, Europe and Latin America (Leclair, 2011). Verizon's acquisition of Terremark Worldwide apparently eliminated the need for a storage center in Laramie and/or used capital that might have been necessary to establish a new data center in Laramie. Regardless, the serious consideration by Verizon confirms that Albany County has assets and incentives that are attractive to data center companies.

A second effort aimed at stimulating new private investment in Albany County is Laramie Economic Development Corporation's development of a South Laramie Transmodal site. The site will include two tracks, containing approximately 1,600 linear feet, that will be capable of accommodating 20 rail cars. Construction of the transmodal site is expected to be completed by July 2012. Adjacent properties zoned for industrial and commercial use are available from Union Pacific Railroad which will provide rail serve to the transmodal site (Stockman, 2012). While the national and regional business climates do not suggest new private investments in the short-term, this community asset holds promise for the attraction of future private investments in Laramie.

The Laramie Economic Development Corporation (LEDC) continues to envision future investments by smaller private technical service companies that could support the planned National Center for Atmospheric Research west of Cheyenne. While anticipated, no

companies have yet announced plans for the establishment of any new private sector operations (Stockman, 2012).

### 2.3.2 Government

Since, at least, late February 2012, the average natural gas price at the Opal Hub in southwest Wyoming has generally been sliding downward. Average prices during the first week in April were near or just below \$2.00 per 1,000 cubic feet (Intercontinental Exchange Data, 2012). This price was considerably less than an anticipated \$3.25 per thousand cubic feet price that State of Wyoming's Consensus Revenue Estimating Group forecasted in January 2012 (Wyoming Consensus Revenue Estimating Group, 2012). A representative of the Wyoming State Legislature's Legislative Service Office recently indicated to local media that every one-dollar decline in natural gas prices generates a loss of about \$114 million a year in State tax revenues (Associated Press, 2012).

This reality provides a reminder of Wyoming's continuing dependence upon state mineral tax revenues for the operation of state and local government. While natural gas prices are forever cyclical, downward trends in mineral tax revenues always point to potential reductions in revenue that can generate potential decreases in governmental expenditures of State government.

The recent decline in state mineral revenues will, in the short term, somewhat reduce the anticipated amount of revenues that will flow into the State of Wyoming's General Fund. But any revenue shortfall could be addressed through the potential use of funds available in the Legislative Stabilization Reserve Account. Consequently, it is reasonable to assume the shortfall in anticipated revenues may lower some agency expenditures in FY 2013 and 2014, but not likely to generate any workforce reductions unless declining mineral revenues slide for an extended period of time (Liu, 2012).

A more extended decline in natural gas prices is not out of the question since some of the nation's largest natural gas producers have already announced plans to slow natural gas production. *"Unless the pace of production declines sharply or demand picks up significantly this summer (of 2012), analysts say, the nation's storage facilities could reach their limits by fall (of 2012). That would cause the price of natural gas, which has been halved over the past year, to nosedive"* (Fahey, 2012).

In terms of county and municipal government, the anticipated upswing in retail sales is expected to help stabilize county and municipal revenues. If realized, this potential trend would likely generate some modest increases to the local government workforce, in FY 2013 and 2014.

### **2.3.2.1**      *Energy Research*

The future expansion of the state government workforce in Albany County is likely if the University of Wyoming succeeds in its quest to expand future research activities. The formation of the School of Energy Resources in 2006 represented one logical opportunity given Wyoming's abundant mineral resources. The Wyoming State Legislature appropriated \$30.9 million in FY 2007 through FY 2010 to support a Clean Coal Technology Fund that is being administered by the UW School of Energy Resources and UW Office of Research and Economic Development.

However, in July 2011, General Electric and the University of Wyoming announced suspension of plans to construct a \$100 million High Plains Gasification-Advanced Technology Center near Cheyenne. The planned joint clean coal research facility, which was scheduled for completion in late 2012, was to provide a test site for the conversion of coal into natural gas (Gruber, 2011). In the short term, the loss of the planned clean coal research facility represents a significant setback to the potential expansion of energy research activities at the University of Wyoming. Nevertheless, continuing demands for "cleaner" sources of energy in the United States may eventually lead to the development of this facility.

### **2.3.2.2**      *Atmospheric Research*

Construction of the new National Center for Atmospheric Research (NCAR) west of Cheyenne also offers prospects for an expansion of research programs at the University of Wyoming in Laramie. Because of the State of Wyoming's financial participation in the construction of this new atmospheric research facility, qualified scientists at the University of Wyoming will be able to access 20 percent of the supercomputer that is scheduled to be installed at the new NCAR facility in May, 2012 (Belden, 2012). This accessibility should enable the University of Wyoming to expand its existing atmospheric research program.

The extent to which increased research activities by the School of Energy Resources and other departments will expand employment at the University of Wyoming during the next decade remains unclear. But the prospects for some growth in employment at the University of Wyoming in Laramie is likely if a sustained financial commitment can be made by the Wyoming State Legislature to support new and expanded programs for energy and atmospheric research.

### **2.3.3**      **Retail Trade**

Overall retail sales in Laramie County have fluctuated considerably since FY 2006. A significant rise in retail sales occurred between FY 2007 and FY 2008. However, signs of reduced discretionary spending derived from the regional recession were confirmed with continuing declines in overall retail sales from FY 2009 through FY 2011. Retail sales in FY 2011 fell almost 16 percent from the amount of retail sales in FY 2008 (Table 2-4).

**TABLE 2-4  
RETAIL TRADE SALES TRENDS  
ALBANY COUNTY, WYOMING  
FISCAL YEARS 2006 TO 2011**

<b>Merchandise Group</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Auto Dealers and Parts	13,171,648	15,891,703	25,155,651	24,212,766	23,070,780	21,812,983
Gasoline Stations	12,266,178	9,052,859	13,906,019	14,012,642	14,793,945	14,939,450
Home Furniture and Furnishings	5,199,273	4,937,348	8,281,665	8,490,344	6,878,978	5,545,800
Electronic and Appliance Stores	12,631,245	14,471,733	21,176,209	22,887,605	15,107,546	13,636,217
Building Material and Garden Supplies	17,536,077	19,781,492	35,967,091	29,803,540	25,019,422	22,557,800
Grocery and Food Stores	21,525,405	9,142,515	10,733,434	11,774,170	11,491,367	10,715,633
Liquor Stores	4,039,028	4,668,437	6,821,884	7,037,559	7,081,469	6,867,350
Clothing and Shoe Stores	3,402,971	3,887,085	5,962,847	6,055,035	6,945,454	6,471,467
Department Stores	6,889,978	6,573,904	8,949,035	8,585,992	7,225,538	7,056,833
General Merchandise Stores	41,974,937	29,245,141	58,337,876	59,885,138	57,953,439	54,934,783
Miscellaneous Retail	18,492,875	19,733,030	32,269,106	30,336,684	31,114,551	27,163,083
<b>TOTAL</b>	<b>157,129,615</b>	<b>137,385,247</b>	<b>227,560,817</b>	<b>223,081,473</b>	<b>206,682,488</b>	<b>191,701,400</b>

Note: Retail sales are derived from tax revenue data for several merchandise groups. Since October 1, 2003, Albany has had a combined sales/use tax rate of 6 percent. One exception was during the third quarter of 2010 when the special purpose option tax expired and the rate was 5 percent.

Sources: Wyoming Dept of Administration & Information, Division of Economic Analysis, 2012; Pedersen Planning Consultants, 2012.

Some retail merchandise groups experienced sales that countered the overall decline in retail sales From FY 2009 through FY 2011. Retail sales at gasoline stations, liquor stores, as well as clothing and shoe stores actually rose during the same period. However, increased sales of gasoline reflected, in part, the rising cost of fuel during this period.

National and regional expectations for greater employment in the private sector and rippling increases in household income suggest an upward bump in retail sales during, at least, 2012 and 2013. It is believed that consumers in Albany County are looking for evidence of a more sustained economic recovery before increasing their discretionary expenditures for various personal and household items. Continued efforts being made by local and state government agencies to encourage the establishment of new private investments, e.g., data centers and other commercial and light industrial operations, offer the best prospect for a sustained rise in retail expenditures as more jobs in the Albany County economy will simply generate increased retail expenditures.

### **2.3.4 Accommodation and Food Services**

#### **2.3.4.1 Accommodations**

Consumer expenditures for lodging services rose 33 percent between FY 2006 and FY 2009 (Table 2-5). The rise in sales of visitor accommodations primarily reflects the development of over 500 new visitor rooms in recent years (Albany Tourism Board, 2012), as well as expanded marketing of available accommodations. In combination, these factors attracted more business travelers, families visiting students attending the University of Wyoming, and other persons traveling along U.S. Interstate 80.

However, the recent national and regional recession also impacted hotel and motel occupancies in Laramie and other parts of Albany County. Slight declines in lodging services sales gradually fell from almost \$17.0 million in FY 2009 to about \$16.2 million in FY 2011 (Table 2-5).

<b>Merchandise Group</b>	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
Lodging Services	12,771,564	15,990,909	16,726,060	16,984,250	16,395,825	16,150,625
Eating and Drinking Places	29,267,521	30,588,325	31,318,422	51,034,730	52,810,110	51,981,400
<b>TOTAL</b>	<b>42,039,085</b>	<b>46,579,234</b>	<b>48,044,482</b>	<b>68,018,980</b>	<b>69,205,935</b>	<b>68,132,025</b>
Notes: 1. Sales derived from accommodations are derived from lodging tax revenue data. Lodging tax rates in Albany County are 4 percent. 2. Food service sales are derived from tax revenue data for eating and drinking places. Since October 1, 2003, Albany has had a combined sales/use tax rate of 6 percent. One exception was during the third quarter of 2010 when the special purpose option tax expired and the rate was 5 percent.						
Sources: Wyoming Dept of Administration & Information, Division of Economic Analysis, 2012; Pedersen Planning Consultants, 2012.						

In the short term, lodging sales are expected to remain generally stable in 2012 and 2013 since much of this travel is associated with the University of Wyoming and Laramie County Community College. Otherwise, no significant increases in lodging service sales are anticipated until a more sustained economic recovery becomes evident to business and recreational travelers who travel along Interstate 80.

### **2.3.4.2 Food and Beverage Services**

The rise in lodging service sales between FY 2006 and 2009 was accompanied by an increase in food and beverage service sales during the same period, as well as FY 2010. Sales earned by eating and drinking establishments steadily rose from roughly \$29.3 million in FY 2006 to \$52.8 million in FY 2010 (Table 2-5). The increase in sales primarily reflects the establishment of more eating and drinking establishments over the four year period. For example, some new restaurants, cafes and bars were established within some of the recently built hotels in Albany County, e.g., Hilton Garden Inn.

Only a modest decline in food and beverage sales occurred in FY 2011. It is surprising that food and beverage service sales did not fall to the extent of other consumer discretionary expenditures.

Future sales by eating and drinking establishments in Albany County are expected to remain stable or increase slightly in 2012 and 2013. Eating and drinking establishments are buoyed by the presence of a larger governmental workforce which experienced considerably fewer job losses during the recent regional recession. If the regional economy continues to rebound, greater food and beverage expenditures by visitors and residents of Albany County can be expected during the remainder of the decade.

### **2.3.5 Health Care and Social Assistance Services**

Most residents seek health care and/or social assistance services on, at least, a periodic basis. Since these services are regarded as a necessity by most residents, the demand for these services will simply rise with any future growth in Albany County's resident population. During the coming decade, the delivery of health care and social assistance services is expected to expand modestly unless a significant number of new jobs are formed in Albany County's private sector. Any significant expansion of the private sector workforce will generate a more substantive demand for more health care and social assistance services.

## **2.4 WORKER COMMUTER PATTERNS**

The Wyoming Department of Employment, Research and Planning Section, and the Wyoming Department of Workforce Services worked cooperatively in 2006 to analyze the commuting patterns of workers from other states who were working in each of Wyoming's 23 counties. The Wyoming Department of Employment developed a statistical model for the project which essentially correlated wage records identifying places of employment with places of residences identified in drivers' license records. This correlation enabled the determination of roughly how many out-of-state workers were commuting to jobs in Wyoming and where these workers were coming from.

From the first quarter of 2005 through the third quarter of 2011, the number of incoming workers to Albany County ranged from roughly 3,114 workers in the first quarter of 2010 to 4,480 workers in the third quarter of 2005. A correlation of available incoming worker and employment data for 2010 suggests that about 22 percent of Albany County's workforce reside outside of Albany County. In 2011, incoming workers from outside of Albany County primarily resided in either Laramie County or Natrona County.

The number of workers commuting to jobs outside of Albany County ranged from 1,932 workers in the first quarter of 2010 to 2,898 workers in the third quarter of 2008. Workers commuting to jobs outside of Albany County primarily traveled to jobs in Laramie County or Natrona County.

## **2.5 COST OF LIVING**

Available cost-of-living information indicates that the overall cost-of-living in Albany County was comparable to the statewide average for most consumer items and services in the fourth quarter of 2011 (Table 2-6). Costs for housing, food and apparel were somewhat higher than the statewide average; in contrast, somewhat lower costs were apparent for transportation, medical, recreation and personal care (Wyoming Department of Administration and Information, Economic Analysis Division, 2012).

**TABLE 2-6**  
**WYOMING COMPARATIVE COST OF LIVING INDEX**  
**FOURTH QUARTER 2011**  
**(STATEWIDE AVERAGE - 100)**

County	Index Number by Category						
	All Items	Food	Housing	Apparel	Transportation	Medical	Recreation & Personal Care
Teton	133	108	159	113	104	105	115
Sublette	113	97	123	123	102	108	105
Campbell	106	104	112	102	101	101	100
Sweetwater	103	97	106	93	100	104	100
Sheridan	102	108	100	128	99	94	103
Natrona	101	99	103	100	101	98	98
Albany	100	101	102	101	97	96	97
Lincoln-Afton	100	96	100	98	99	96	112
Fremont	100	97	97	99	103	113	102
Carbon	99	98	98	99	102	101	101
Lincoln-Kemmerer	99	92	101	93	100	91	100
Johnson	98	105	92	121	100	97	104
Laramie	97	100	98	86	97	92	96
Park	95	102	88	104	100	103	98
Converse	95	97	90	86	101	98	102
Washakie	94	100	80	114	104	112	113
Uinta	94	92	90	90	98	103	97
Crook	91	100	81	113	102	97	96
Hot Springs	91	100	77	99	104	112	105
Weston	90	97	81	97	100	103	94
Goshen	90	93	78	116	100	108	96
Big Horn	89	108	73	105	101	99	98
Niobrara	88	97	75	100	101	99	104
Platte	86	97	69	96	103	101	100
Note: Prices as of January 4-6, 2012.							
Source: Wyoming Department of Administration and Information, Economic Analysis Division, 2012.							

When correlated with comparable data for the second quarter of 2009, it is apparent that the overall cost-of-living in Albany County rose somewhat between 2009 and 2011. The most significant increase appears to be for rising costs associated with housing, food and apparel and housing. Slightly lower costs were only evident for recreation and personal care.



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## CHAPTER THREE

# AVAILABLE CHILD CARE SERVICES IN ALBANY COUNTY

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### 3.1 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.

Chapters 1 through 12 of the Wyoming Administrative Rules for Certification of Child Care Facilities further define and describe those child caring facilities that are required to obtain state certification or licensing. These rules also establish the responsibilities for child care licensing, monitoring, and enforcement of the applicable Administrative Rules to the Wyoming Department of Family Services.

#### 3.1.1 Licensed Facilities

Three types of child care facilities in Wyoming are required to be licensed. Chapter Two, Section 1 of the Administrative Rules for Certification of Child Care Facilities, defines each of these facilities as follows:

1. A family child care home (FCCH) is a licensed child care facility located in the primary residence of the child care provider that serves no more than 10 children.
2. A family child care center (FCCC) is a child care facility located in a residential or commercial structure where care is provided for a maximum of 15 children for part of a day.
3. A child care center (CCC) is a child care facility operated by a private person, partnership association or corporation in a commercial building where 16 or more children receive care for part of the day.

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 Services Administrative Rules for Certification of Child Care Facilities.

Periodic inspections are made of each licensed child care facility. During 2011, the Wyoming Department of Family Services documented 55 violations (Table 3-1). These violations were associated with a wide range of child care issues such as child care facility reporting, hazardous conditions, the amount of available outdoor play space, as well as health and sanitation (Weber, Wyoming Department of Family Services, 2012).

All violations are required to be corrected within specified time periods. It is important to note that facility deficiencies have apparently been corrected as no child care facility licenses in Albany were revoked between 2009 and 2011 (Weber, 2012).

### 3.1.2 Exempt Facilities

Any individual who provides care for more than two children is required to be licensed unless they qualify for one of the following 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 who do not regularly engage in child care.
3. Parents who cooperatively exchange child care.
4. Child care is provided by a person employed to come to the home of a child's parents or guardian.
5. Child care facilities providing care to the children of one immediate family unit.
6. Foster homes that are supervised by the State of Wyoming, local government, a school district, agency or other political subdivision (Wyoming Legislative Services Office, 2008).

<b>TABLE 3-1 LICENSED CHILD CARE FACILITIES VIOLATIONS 1N 2011 ALBANY COUNTY, WYOMING</b>	
<i>Type of Violation</i>	<i>Number of Violations</i>
General	13
Hazardous Conditions	13
Records and Reports	7
Health and Sanitation	6
Outdoor Play Space	6
Capacity/Supervision Requirements	4
General Compliance	3
Capacity	1
Exclusion from Care	1
Transportation/Field Trips	1
<b>TOTAL</b>	<b>55</b>
<small>Source: Wyoming Department of Family Services, 2012.</small>	

With the exception of care by a legal parent or relative, these exemptions cannot be combined. If and when potential exemptions are combined, the total number of unrelated children under care cannot exceed two children unless all of the unrelated children are from one immediate family. In the case of grandparents, the total number of children receiving care cannot exceed six children (Wyoming Department of Family Services, 2008).

Any legally exempt facility may still request voluntary licensing by Wyoming Department of Family Services.

### 3.1.3 Illegal Facilities

Some child care facilities provide child care to more than two unrelated children. For the most part, these facilities are operated by local residents who either have not

qualified for, or have neglected to secure, a 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. W.S. 14-4-110 and 111 indicate that these facilities can be fined between \$50 and \$200 per day for each day that any non-exempt child care operates without certification (Wyoming Legislative Services Office, 2012)

## **3.2 CHILD CARE TRENDS IN ALBANY COUNTY**

### **3.2.1 Introduction**

The following evaluation of child care trends relied, in part, upon available child care enrollment data and child care cost information. Child Care Finder, Wyoming's Child Care Resource and Referral Service network, collects this information in the second quarter of each year. Child care enrollment and cost data is compiled within a database maintained by Child Care Finder. Child Care Finder was established by Children and Nutrition Services, Inc. and provides these services to the Wyoming Department of Family Services on a contractual basis.

Available enrollment data for 2006 2Q through 2011 2Q was supplemented by comparable information for 2012 2Q. More recent enrollment information for 2012 2Q was collected by Pedersen Planning Consultants via telephone discussions with representatives of licensed and exempt child care providers in Albany County. Although, PPC was unable to collect data from three child care homes and one child care center; consequently, this data should be considered preliminary.

### **3.2.2 Type and Location of Facilities**

#### **3.2.2.1 *Licensed Child Care Facilities***

Forty-one licensed child care facilities were operating in Albany County during the second quarter of 2011 (Table 3-2). These facilities included 21 licensed family child care homes (FCCH), nine family child care centers (FCCC), and 11 child care centers (CCC). Consequently, family child care homes represent approximately 51 percent of all licensed child care facilities in Albany County.

In response to growing child care demands, the overall number of licensed child care facilities in Albany County climbed from 37 facilities in the second quarter of 2009 to 41 in 2011. The number of child care homes remained at 21 facilities. In contrast, the number of family child care centers increased from six to nine. There were 11 child care centers in 2011 compared to 10 in 2009.

**TABLE 3-2  
CHILD CARE FACILITIES  
DOCUMENTED CAPACITY, ENROLLMENT AND HOURS OF OPERATION  
ALBANY COUNTY, WYOMING  
SECOND QUARTER 2011**

No.	Location/Facility New Facilities Since 2009 2Q (in blue)	Hours of Operation Monday through Friday except holidays unless specified otherwise	<sup>a)</sup> WDFS Type of Facility	<sup>b)</sup> WDFS Author- ized Capacity	Child Care Provider Desired Capacity	Total Enrollment	Infants Birth to 12 Months	Toddler 12 to 36 Months	Preschool 3 to 5 Years	School Age 6 to 12 Years	
1	Jackie Aguilar	7:30 am-5:00 pm	FCCH	6	6	7	0	2	5	0	
2	Angela Armijo	7:30 am-5:30 pm	FCCH	8	6	5	0	4	1	0	
3	Baby Darling Child Care (Karen Lundahl)	7:00 am - 6:00 pm	FCCH	10	10	15	0	3	8	4	
4	Basic Beginnings	6:30 am-6pm, 8am-3pm	CCC	164	160	175	7	27	95	46	
5	Basic Beginnings South	5:45 am-8:30 pm	CCC	156	156	154	8	36	84	26	
6	Centennial Valley Preschool & Child Care	MTWTh 2:30-6:00 pm, F 8am-6pm	FCCC	12	12	9	0	0	3	6	
7	Corthell Hill Daycare	7:00 am-4:00 pm	FCCH	10	7	4	0	2	2	0	
8	Country Peas	7:15 am-4:15 pm	FCCC	9	9	3	0	0	3	0	
9	Developmental Preschool & Day Care	6:45am-6pm, M-Th 9am-12 Noon	CCC	110	110	95	0	17	50	28	
10	Grandma Jeannie	5:30 am-5:00 pm	FCCH	10	6	6	0	3	3	0	
11	Granny's Place	6:45 am-5:30 pm	FCCH	10	10	7	1	1	5	0	
12	Hilltop Christian Child Care, Inc.	7:00 am-6:00 pm	CCC	65	65	56	4	9	28	15	
13	Indian Hills Day Care, Inc.	7:15 am-5:15 pm	FCCH	10	10	6	0	2	4	0	
14	Jami's Day Care	7:00 am-5:30 pm	FCCH	9	6	1	1	0	0	0	
15	Johnson's Corner Daycare	6:30 am-11:00 pm	<sup>c)</sup> FCCC	<sup>e)</sup> 15	6	16	2	5	7	2	
16	Julie's Home Daycare	7:30 am-4:30 pm	FCCH	7	7	10	1	2	7	0	
17	Karena's Korner	7:00 am-5:30 pm	FCCH	10	10	5	0	3	2	0	
18	Kiddie Cottage	6:00 am-6:00 pm	CCC	31	31	32	0	0	19	13	
19	Kids Just Wanna Have Fun	6:30 am-6:00 pm	CCC	<sup>e)</sup> 126	126	64	3	14	25	22	
20	Laramie Community Recreation Center	8am-12 noon, 3:15-5:30 pm	<sup>d)</sup> Exempt	N/A	N/A	84	0	0	0	84	
21	Laramie Cooperative Preschool	8:30-11:30 am	FCCC	15	15	22	0	0	22	0	
22	Laramie Head Start/Child Developmt Corp	8:00 am - 3:00 pm	CCC	92	92	92	0	40	52	0	
23	Little Pokes	7:30 am-5:30 pm	FCCH	8	8	10	0	7	3	0	
24	Little Sprouts Child Care	6:00 am-6:00 pm	FCCC	15	15	24	0	8	10	6	
25	Little Tyke's Daycare	7:00 am-6:00 pm	FCCC	15	15	24	0	4	11	9	
26	Mary's Day Care	7:00 am-6:00 pm	FCCH	10	10	8	0	2	3	3	
27	Medina Child Care	7:00 am-5:00 pm	FCCH	10	6	5	0	2	3	0	
28	Montessori Children's House	8 am-12:30 pm, 12:30-3:30 pm	FCCC	15	9	17	0	0	17	0	
29	CheyAnne Nielson	7:30 am-5:30 pm	FCCH	9	5	1	0	1	0	0	
30	Pat's Day Care	7:15 am-5:15 pm	FCCH	10	10	8	0	0	8	0	
31	Puddle Ducks	7:30 am - 5:30 pm	FCCH	8	8	6	0	0	6	0	
32	RJM Daycare	6:00 am - 5:00 pm	FCCH	8	8	9	0	2	4	3	
33	Reitsma Day Care	6:00 am-6:00 pm	FCCH	10	9	8	0	2	6	0	
34	St. Laurence Preschool	7:30 am-5:30 pm	CCC	<sup>e)</sup> 34	18	71	0	0	15	56	
35	Spring Creek Day Care	7:00 am-5:15 pm	<sup>c)</sup> FCCC	<sup>e)</sup> 15	15	0	0	0	0	0	
36	Sunflower Childcare	7:45 am-5:15 pm	FCCH	10	10	11	0	1	10	0	
37	The Cabbage Patch	6:00 am-6:00 pm	FCCC	15	15	0	0	0	0	0	
38	The Kids Connection	6:30 am-6:00 pm	CCC	155	75	89	0	7	37	45	
39	The Open School	8:30-11:30 am; 7:30 am-5:30 pm	CCC	101	64	54	0	0	54	0	
40	The Ranch Preschool	8:30 am-12 Noon	CCC	50	50	83	0	0	83	0	
41	The Tot Spot	7:30 am-5:30 pm	FCCH	10	10	2	1	0	1	0	
42	UW Early Care and Education Center	7:30 am-5:30 pm	<sup>d)</sup> Exempt	N/A	N/A	89	8	20	45	16	
43	Welcome to Grandma's House	6:30 am-5:00 pm	FCCH	6	6	5	0	1	3	1	
<b>ALBANY COUNTY</b>				<b>TOTALS</b>	<b>1399</b>	<b>1226</b>	<b>1392</b>	<b>36</b>	<b>227</b>	<b>744</b>	<b>385</b>

Notes: a)WDFS-State of Wyoming, Department of Family Services. CCC-Childcare Center; FCCC- Family Child Care Center; FCCH-Family Child Care Home. b) Authorized facility capacity for WDFS licensed facilities. c) Facility changed from an FCCH to an FCCC, d) Exempt facilities are not required to be licensed by the State of Wyoming, e) These licensed facilities expanded their authorized enrollment capacity since 2009 Second Quarter.

Sources: Children and Nutrition Services (CNS), 2012; Pedersen Planning Consultants, 2012.

The growth in somewhat larger child care facilities suggests a possible trend toward the establishment of larger child care operations to achieve a reasonable return-on-investment. Evidence of this potential trend is also supported by the closure of four child care homes and one child care center in late 2009, as well as the closure of two child care homes, one family child care center, and one child care center in late 2010.

### **3.2.2.2      *Exempt Child Care Facilities***

Two exempt child care facilities operated in Albany County in the second quarter of 2011 (Table 3-2). These facilities included the Laramie Community Recreation Center and the University of Wyoming Early Care and Education Center. The former University Apartments After School Program, which closed in 2009, was essentially incorporated into the University Early Care and Education Center.

The after school program held at Laramie Community Recreation Center includes from kindergarten through sixth grade. Most students in this after school program attend Beitel, Indian Paintbrush, Linford, Slade, Snowy Range Academy, Spring Creek, and UW Lab Schools. These students are bussed to the Laramie Community Recreation Center by Albany County School District #1. Students from other schools are also welcome in the program, but must arrange for their own transportation from school to the Recreation Center (City of Laramie, Department of Parks and Recreation, 2009).

### **3.2.2.3      *Illegal Child Care Facilities***

When the Wyoming Department of Family Services (WDFS) receives a complaint 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 works with those operators who are sincerely interested in complying and eventually becoming licensed.

Should these illegal facilities fail to become licensed, they may be forced to close or may be fined in accordance with W.S. 14-4-110 and 14-4-111. A few illegal facilities may have been operating without the knowledge of Wyoming Department of Family Services or other local authorities in Albany County during 2Q 2011.

## **3.2.3    Available Child Care Services and Enrollment**

### **3.2.3.1      *Available Services and Total Enrollment***

Licensed and exempt child care facilities in Albany 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 age children from 3 through 5 years of age;
4. school age children from 6 through 12 years of age.

Preliminary data for 2012 2Q suggests a total child care enrollment of 1,351 children. This enrollment is somewhat less than the 1,392 children enrolled at licensed and exempt child care facilities in Albany County during the second quarter of 2011 (Table 3-2). This enrollment compares to 1,096 children in the second quarter of 2010 and 1,115 children in the second quarter of 2009. While child care enrollments rose considerably between 2010 and 2011, overall child care enrollments did not exceed the enrollments of 2006 except in 2011 and 2012 (Table 3-3).

Child care enrollments between 2006 and 2012 consistently reflect high volatility from year to year. Downturns in enrollments during this period sometimes correlate with changing economic trends, but not always. For example, the recent recession that adversely brought rising unemployment levels in the first three quarters of 2010 appears to have influenced a decline in infant and toddler care enrollments in 2011. But, in contrast, child care enrollments for preschool care skyrocketed and after school care enrollments increased substantially. Trends associated with each of the four child care groups are discussed more fully in the following paragraphs.

### 3.2.3.2 *Infant Care*

Infants, between birth and one year of age, continue to comprise the smallest child care age group served.

In 2009 2Q, there were 76 infants (children from birth to 12 months of age) enrolled in licensed and exempt child care facilities in Albany County (Table 3-3). In 2010, the number of enrolled infants decreased to 72 infants. In the second quarter of 2011, only 36 infants were enrolled in child care facilities in Albany County, less than half of the infants enrolled in 2009. The combination of significant increases in infant care costs and rising unemployment likely contributed to this rather significant decline in infant enrollment. The availability of infant care may have also influenced the decline in infant care enrollments.

But, in 2012 2Q, a significant increase in infant care enrollment occurred with infant enrollment jumping to 95 children. PPC estimates that almost 21 percent of the children, who were under one year of age, were enrolled in child care in 2Q 2012. This compares with almost eight percent in 2Q 2011. Discussions with child care providers in April 2012 indicate that the enrollment rose with the availability of expanded enrollment capacity for infants. At the same time, other providers in Albany County expressed that they are reluctant to provide more infant care in view of greater regulatory requirements and higher operational costs associated with infant care. Nevertheless, added enrollment capacity between 2011 2Q and 2012 2Q clearly influenced a dramatic increase in infant care enrollment.

**TABLE 3-3  
ANNUAL CHILD CARE ENROLLMENTS IN ALBANY COUNTY  
SECOND QUARTER  
2006 - 2012**

<i>Year</i>	<i>Infants Birth to 12 Months</i>	<i>Toddlers 1 to 3 Years</i>	<i>Preschool 3 to 5 Years</i>	<i>School Age 6 to 12 Years</i>	<i>Total Enrollment</i>	<i>Annual Growth (%)</i>
2006 2Q	117	264	565	346	1,292	
2007 2Q	124	233	477	212	1,046	-19.0%
2008 2Q	116	188	469	226	999	-4.5%
2009 2Q	76	247	493	299	1,115	11.6%
2010 2Q	72	290	488	335	1,185	6.3%
2011 2Q	36	227	744	385	1,392	17.5%
<sup>a)</sup> 2012 2Q	95	229	648	379	1,351	-2.9%

Note: <sup>a)</sup> 2012 enrollments are preliminary estimates.

Sources: Children and Nutrition Services, Inc., Child Care Finder, 2009, 2012; Pedersen Planning Consultants, 2009, 2012.

### 3.2.3.3 *Toddler Care*

PPC estimates that about 229 Albany County children were enrolled in toddler care in 2012 2Q. This enrollment compares with approximately 227 children who were enrolled in toddler care in 2011 2Q.

Toddlers comprised about 17 percent of all of the children enrolled in licensed and exempt child care facilities in 2011. Toddler enrollment in 2011 2Q represented a decline from earlier toddler enrollments in 2009 (247 children) and 2010 which included 290 children (Table 3-3).

The 22 percent decline in toddler enrollment between 2010 2Q and 2011 2Q appears to be driven largely by economic factors. Rising unemployment in Albany County during the first three quarters of 2010 likely prompted many households to re-evaluate and reduce their household expenditures.

### 3.2.3.4 *Preschool Age Care*

While 2011 infant and toddler care enrollments appear to have been affected by reduced employment and related impacts of the recent recession, preschool age care enrollments did not. In 2011 2Q, 744 children in Albany County were enrolled into preschool age care. Preschool enrollments comprised 53 percent of the total child care enrollment in Albany County, the largest enrollment of the four child care age groups (Table 3-3).

The 52 percent rise in preschool enrollments between 2010 and 2011 is surprising. But, the significant climb in enrollment may point to one underlying assumption that many Albany parents with younger children may have:

*It is very important that our children become prepared for their entrance into kindergarten and elementary education.*

If this assumption holds true for most Albany County parents with younger children, it is likely that the placement of their children in preschool is viewed as an essential expenditure that is made regardless of regional economic conditions.

Preliminary enrollment data for 2012 2Q indicates a potential decline of almost 13 percent. The cause of this decline is unknown, but it is certainly influenced by a wide variety of potential factors influencing preschool care enrollments.

### **3.2.3.5 School Age Care**

Child care for Albany County school age children, between the ages of six and twelve years of age, included 379 children in 2012 2Q and 385 children in 2011 2Q (Table 3-3). The 2011 enrollment comprised almost 28 percent of the total child care enrollment in licensed and exempt child care facilities.

Enrollments in after school care declined from 346 children in 2006 2Q to 212 children in 2007 2Q. Since 2008, after school enrollments have generally reversed their downward trend. Enrollments increased from 226 children in 2008 2Q to 299 children in 2009 2Q, 335 children in 2010 2Q, and 385 children in 2011 2Q. The rise in enrollment between 2010 and 2011 represented an increase of almost 15 percent. While this increase was considerably less than the upswing in preschool care enrollments, it is apparent that parents with children also value after school programs that provide a safe and enjoyable experience for their children prior to their parents' arrival home from work. The rise in after school enrollments during a period of higher unemployment suggests that parents, working outside the home, view the assurance of their children being located in a safe environment, as essential.

### **3.2.4 Authorized Facility Capacity**

During the process of child care facility certification, the Wyoming Department of Family Services assigns a maximum facility capacity to each licensed child care facility. The facility capacity authorized by the Wyoming Department of Family Services (WDFS) is the overall number of children that can be served by a child care facility at any given time.

The cumulative facility capacity of licensed child care facilities in Albany County was 1,399 children in 2Q 2011 (Table 3-2). This compares to a cumulative authorized capacity of 1,138 in 2010 and 1,168 children in 2009.

The correlation of licensed child care capacities and enrollments provides a useful statistical indicator that can be used to assess the extent to which existing child care facilities can meet existing demands. For example, the correlation of cumulative authorized facility capacities with estimated enrollments for 2Q 2011 indicates that licensed child care facilities were serving enrollments that represented almost 94 percent of their total authorized capacity.

Since publication of the earlier 2009 Albany County Child Care Needs Study, Child Care Finder has begun collecting information concerning the maximum enrollment which each individual child care provider prefers to operate. In 2011 2Q, licensed child care operators in Albany County preferred to serve an overall enrollment of 1,226 children rather than the 1,399 children that is authorized by the Wyoming Department of Family Services. The overall preferred capacity of 1,226 children in 2011 2Q was almost identical to the overall enrollment of 1,219 children at licensed child care facilities, but were 180 children less than the authorized capacity.

### **3.2.5 Hours of Operation**

Child care facilities in Albany County typically operate Monday through Friday. Child care facilities typically operate for about nine to 12 hours during any weekday. Most child care facilities typically open at 6:00 or 7:00 a.m. and close by not later than 6:00 pm (Table 3-2). Preschool education programs associated with some child care facilities offer two to three hour learning sessions for a portion of specified days of operation.

The availability of 24-hour child care enables some parents to work non-traditional time periods at Iverson Memorial Hospital, Cathedral Home, or various public safety agencies. Only one licensed child care facility in Albany County remains open until 11:00 pm.

### **3.3 PLANNED EXPANSIONS OR CLOSURES OF CHILD CARE FACILITIES**

In late March and early April 2012, Pedersen Planning Consultants attempted to contact representatives of 41 licensed and two exempt child care facilities in Albany County to determine, in part, if any existing child care facility planned to expand or close its operations. PPC was able to contact all but four representatives of these child care facilities.

Several representatives reported that they had recently received authorization to increase the capacity of their facilities in order to accommodate service to a few more children. Otherwise, no future expansions in Albany County were anticipated.

Representatives of two family child care homes reported to PPC in April 2012 that they would be closing their operations in May 2012. Their planned decisions to close were based, in part, upon the opening of a larger child care center in 2011 which they claim impacted their ability to retain existing clients and capture new clients.

### 3.3.1 Pending Applications for New or Expanding Child Care Facilities

At the time of this report, the Wyoming Department of Family Services reports that there are no pending applications for the establishment of new child care facilities or the expansion of existing facilities (Weber, 2012).

### 3.4 COST OF CHILD CARE SERVICES

The average cost of daily child care has increased considerably between 2006 and 2011 (Table 3-4). The escalating cost of child care reflects a combination of factors such as increased labor and operating costs, federally mandated increases in the minimum wage, changing child-teacher ratio requirements, changes in child care subsidy levels, and other related factors. The significant climb in child care costs points to one contributing factor that has undoubtedly influenced the decline in child care enrollments for, at least, infant care and toddler care.

<i>Year</i>	<i>Infants Birth to 12 Months</i>	<i>Toddlers 1 to 3 Years</i>	<i>Preschool 3 to 5 Years</i>	<i>School Age 6 to 12 Years</i>
2006 2Q	23.04	21.68	20.48	20.48
2009 2Q	28.04	26.57	25.07	24.22
2010 2Q	30.66	28.21	26.27	25.48
2011 2Q	31.63	29.76	27.27	25.84

Sources: Children and Nutrition Services, Inc., Child Care Finder, 2009 and 2012; Pedersen Planning Consultants, 2009 and 2012.

Infant care costs have steadily climbed since 2006 and continue to be the highest in light of required staff-child ratios and increased labor costs. The annual cost of infant care in Albany County increased 37 percent between 2006 and 2011, or about 7.5 percent per year. Between 2009 and 2011, when many child care operators were likely concerned with the ability of customers' ability to afford infant care costs, the cost of infant care still increased to just over six percent per year.

The rising cost for toddler care has also increased significantly. Since 2006, daily costs for toddler care have increased from \$21.68 per day in 2006 to \$29.76 per day in 2011 (Table 3-4). While the average cost in 2011 is \$1.87 less than infant care, the rise in average toddler care costs between 2006 and 2011 parallels the upward swing in infant care. Toddler costs during this period rose 37 percent, or approximately 7.5 percent per year.

The average cost of preschool age care also increased from \$20.48 in 2006 to \$27.27 per day in 2011. The boost in preschool age care costs between 2006 and 2011 represented an increase of 33 percent, or about 6.6 percent per year (Table 3-4).

Before and after school care is typically not provided for a full day. But, when average costs for school age care are calculated for a comparable daily cost, the cost of school age care is the lowest of the four child care age groups. Between 2006 and 2011, school age care climbed from \$20.48 in 2006 to \$25.84 in 2011. The \$5.35 cost increase represented a 26 percent increase, or about 5.2 percent per year.

On a cumulative basis, child care costs for all four age groups increased almost 34 percent between 2006 and 2011. The extent to which child care costs in Albany County have increased is a disturbing trend. During the past decade, the State of Wyoming and various counties such as Albany County have exerted considerable effort toward encouraging the establishment of more child care services in Wyoming communities. In response, a host of private and non-profit child care providers have emerged and made significant investments of time and money to establish child care operations to provide services that enable both men and women to participate fully in the workforce. The overall rise in child care costs between 2006 and 2011 was considerably greater than the cumulative rate of inflation in Wyoming which was about 20.3 percent between the second quarter of 2006 and the second quarter of 2011 (Wyoming Department of Administration and Information, Economic Analysis Division, 2012). Average wage and salaries for all private and public sector jobs rose only 19 percent between 2006 and 2010 (U.S. Bureau of Labor Statistics, 2012). Consequently, women and men participating in the employed workforce, who have children in child care, are losing money as their wage and salary levels cannot keep pace with growing child care costs.



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## CHAPTER FOUR

### ANTICIPATED CHILD CARE DEMAND

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#### 4.1 INTRODUCTION

Chapter Four provides revised forecasts of the child care demands anticipated for Albany County between 2012 and 2022. Pedersen Planning Consultants (PPC) previously prepared forecasts of anticipated child care demand for Albany County in its 2009 Albany County Child Care Needs Study, as well as in 2006 as part of its statewide Wyoming Workforce Child Care Needs Assessment.

During the preparation of forecasts for the current 2012 study, Pedersen Planning Consultants used a methodology that was comparable to the approach used to calculate future child care demands in 2009. The only difference between the 2009 and 2012 forecasts is that more current information was used to calculate the potential child care enrollment range.

#### 4.2 METHODOLOGY

Pedersen Planning Consultants (PPC) initially evaluated selected demographic and economic trends in Albany County, particularly industry trends and changes in employment. The results from these evaluations are presented in Chapter Two of this report. The trends determined from the demographic and economic analyses were used to establish arbitrary estimates of potential annual population growth in Albany County between 2011 and 2022.

PPC also compiled and analyzed available child care enrollment data from Child Care Finder. Data was compiled in a manner to distinguish variable enrollment trends for each child care age group. This information is presented in Chapter Three.

Subsequently, revised child care demand forecasts for Albany County were calculated in two different ways in order to establish a forecast range for the next decade. Both calculations were made through the use of a statistical child care demand model developed by Pedersen Planning Consultants.

- The first approach initially estimated the size of the four child care age groups through the correlation of 2010 U.S. Census data and PPC's forecasts of the Albany County resident population (Table 4-1). Available child care enrollment data enabled PPC to estimate what proportion of children in each age group were receiving care from child care providers in Albany County. Statistical proportions for each of the four age groups were applied to the revised annual population forecasts for Albany County.

With the exception of toddler care, the first approach reflects the low end of the demand range. Child care enrollment data provides a reliable statistical indicator that can be used to determine what proportion of the potential market can be expected to receive child care from local child care services.

- The second approach calculated the rate of growth in child care enrollments, for each of the four age groups, between 2009 2Q and 2012 2Q. Child care enrollment data for 2009 through 2011 represented data obtained by the Child Care Finder Network. Enrollment data for 2012 was obtained by Pedersen Planning Consultants through its telephone discussions with representatives of licensed and exempt child care providers in April 2012. The rate of growth for each age group was applied to the estimated 2012 2Q child care enrollments to calculate demands for each year of the coming decade.

With the exception of toddler care, this second approach represents the high end of the demand range. This approach reflects the rate of growth in child care enrollments during and after the recent national recession that significantly impacted the State of Wyoming's economy between 2008 4Q and 2010 1Q.

The forecast of unmet demands was determined by deducting 2Q 2012 enrollments from the anticipated enrollment range for each child care age group. The underlying assumption associated with the calculation of unmet demands is that existing facilities will continue to accommodate, at least, their present enrollments. When existing facilities close, more demand for child care is generated. Conversely, unmet demands are absorbed when new or expanded child care facilities are developed and enroll additional children.

The statistical median presented for each forecast range was calculated only to facilitate the description and use of the forecasts. Otherwise, the statistical median presented in this report has no significance.

### **4.3 ANTICIPATED POPULATION GROWTH**

The resident population of Albany County included an estimated 36,956 residents in 2011. The estimated 2011 population represents a 1.8 percent increase from the April 2010 Census that documented 36,299 residents. In 2012, PPC estimates that the resident population will increase to approximately 37,640 residents.

Beyond 2012, future population growth in Laramie County is expected to steadily rise between 2013 and 2022 (Table 4-1). Gradual population growth, ranging between 1.80 and 2.10 percent per year, is anticipated during the coming decade as the community continues to encourage expansion of its private and public sectors.

Recent efforts by the City of Laramie, Laramie Economic Development Corporation, and Albany County appear to focus upon attracting private sector expansion through the establishment of shovel-ready commercial and industrial sites, as well as sites in close proximity to rail access. These community development actions hold some promise for future private investments in Albany County.

The University of Wyoming's access to 20 percent of the supercomputer at the National Center for Atmospheric Research should provide the impetus for an expansion of atmospheric research at the University. Similarly, the State of Wyoming and the University of Wyoming's continued commitments to energy research should generate an expansion of energy research opportunities.

These trends are expected to gradually increase private investments, expand employment opportunities in both the private and public sectors, increase household incomes, and generate a gradual rise in consumer expenditures.

<b>TABLE 4-1 ESTIMATED AND ANTICIPATED RESIDENT POPULATION ALBANY COUNTY 2012-2022</b>		
<i>Year</i>	<i>Estimated Population (persons)</i>	<i>Anticipated Annual Rate of Growth (percent)</i>
4/1/2010	36,299	
2011	36,956	1.81
2012	37,640	1.85
2013	38,355	1.90
2014	39,122	2.00
2015	39,865	1.90
2016	40,583	1.80
2017	41,394	2.00
2018	42,264	2.10
2019	43,067	1.90
2020	43,864	1.85
2021	44,653	1.80
2022	45,479	1.85

Source: Pedersen Planning Consultants, 2012.

#### **4.4 CHILD CARE DEMAND FORECAST**

##### **4.4.1 General**

During the next decade, the total child care demand in Albany County is expected to range between 1,696 and 2,558 children by the year 2022 (Table 4-2). Forecasts for the next decade are discussed more fully in the following paragraphs.

##### **4.4.2 Infant Care Demand**

Infant care demands during the next decade are expected to rise from 95 children in 2Q 2012 to between 115 and 174 infants in 2020. The high end of this range is expected to be a more reasonable estimate for the next decade recognizing that nominal population growth can be expected to gradually increase the demands for infant care.

**TABLE 4-2  
ANTICIPATED DEMAND FOR CHILD CARE  
NUMBER OF CHILDREN  
ALBANY COUNTY, WYOMING  
2012 to 2022**

Year	Child Care (birth to 12 months)			Toddler Child Care (12 to 36 months)			a) Preschool Child Care (3 to 5 years)			School Age Child Care (6 to 12 years)			b) Total Child Care Demand		
	Forecast Range			Forecast Range			Forecast Range			Forecast Range			Forecast Range		
		Median			Median			Median			Median			Median	
2012	95	95	95	229	229	229	648	648	648	379	379	379	1,351	1,351	1,351
2013	97	99	101	225	230	236	772	736	699	400	402	404	1,494	1,467	1,440
2014	99	103	107	221	231	240	788	771	754	408	419	431	1,516	1,524	1,532
2015	101	107	114	217	231	245	803	808	813	415	438	460	1,536	1,584	1,632
2016	102	112	121	213	231	249	817	847	877	423	457	491	1,555	1,647	1,738
2017	104	117	129	209	232	254	833	890	946	431	478	524	1,577	1,717	1,853
2018	107	122	137	205	232	260	851	936	1,020	440	500	559	1,603	1,790	1,976
2019	109	127	145	201	233	265	867	984	1,101	449	522	596	1,626	1,866	2,107
2020	111	133	154	198	234	269	883	1,035	1,187	457	547	636	1,649	1,949	2,246
2021	113	138	164	194	234	274	899	1,090	1,280	465	572	679	1,671	2,034	2,397
2022	115	144	174	191	235	279	916	1,148	1,381	474	599	724	1,696	2,126	2,558

Notes:

- a) The calculation of anticipated demand for preschool care was based upon a very nominal rate of growth exhibited for total child care enrollment between 2Q 2006 and 2Q 2009 rather than the declining growth suggested by available enrollment data for the same period.
- b) Total child care demand represents the number of children that are expected to be enrolled in child care facilities in a given year. The estimates for each are not cumulative; rather they represent estimated enrollments for a given year. As new child care facilities are developed or existing facilities expanded, their capacities should be deducted from anticipated demand to estimate future needs.

Source: Pedersen Planning Consultants, 2012.

### 4.4.3 Toddler Care Demand

It is anticipated that toddler care demands during the next decade will increase from 229 toddlers in 2Q 2012 to between 191 and 279 children in 2020. Gradual increases in the resident population of Albany County bring expectations closer to the high end of the forecast range.

### 4.4.4 Preschool Age Care Demand

In 2020, the demand for preschool age care is expected to range between 916 and 1,381 children. Available enrollment data for 2011 and 2011 supports the contention that many Albany County parents with children preschool care as an essential preparation for kindergarten and elementary education. This belief, combined with potential job and population growth, suggest that this age group will continue to represent the strongest segment of future child care demand during the next decade.

#### **4.4.5 School Age Care Demand**

During the next decade, it is anticipated that the enrollment in school age care will continue to climb from 379 children in 2Q 2012 to between 474 and 724 students in 2020. Similar to preschool care, available enrollment data for 2011 2Q and 2012 2Q indicate the importance of a safe and enjoyable place for their children during after school hours before parents arrive home.

These considerations and anticipated job growth are expected to drive the demand for school age care. Future demand is also dependent upon the continued availability of expanding after school programs and the related transportation of students to various locations such as the Laramie Recreation Center.

The continued availability of school aged care from private child care providers is also essential to accommodating future school age care demands. A segment of the demand for school age care includes children whose parents have work shifts that extend beyond the normal operating hours of public agencies and non-profit organizations.

#### **4.4.6 Unmet Demand**

Child care demands not served by existing providers are referred to as unmet demand. As stated earlier, unmet demand is determined through the subtraction of estimated 2Q 2012 enrollments, for each age group, from the anticipated annual demands for each age group during the coming decade (Table 4-3). Negative numbers presented in Table 4-3 indicate that anticipated demands could be met or supported by existing child care facilities. Conversely, a positive number indicates demand for additional children that would be unmet, or not supported, by existing child care facilities.

The calculation of unmet demands for Albany County suggests that there will be continuing demand for all four child care age groups. The greatest demand is expected for preschool care and school age care. Conversely, considerably less demand is anticipated for toddler and infant care.

As stated earlier, the underlying assumption associated with the calculation of unmet demands is that existing facilities will continue to, accommodate, at least, their present enrollments. When existing facilities close, more demand for child care is generated. Conversely, unmet demands are absorbed when new or expanded child care facilities are developed and enroll new children.

**TABLE 4-3  
ANTICIPATED UNMET CHILD CARE DEMAND  
NUMBER OF CHILDREN  
ALBANY COUNTY, WYOMING  
2012 to 2022**

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)			a) Total Unmet Child Care Demand		
	Forecast Range			Forecast Range			Forecast Range			Forecast Range			Forecast Range		
		Median			Median			Median			Median			Median	
2013	2	4	6	-4	1	7	124	88	51	21	23	25	143	116	89
2014	4	8	12	-8	2	11	140	123	106	29	40	52	165	173	181
2015	6	12	19	-12	2	16	155	160	165	36	59	81	185	233	281
2016	7	17	26	-16	2	20	169	199	229	44	78	112	204	296	387
2017	9	22	34	-20	3	25	185	242	298	52	99	145	226	366	502
2018	12	27	42	-24	3	31	203	288	372	61	121	180	252	439	625
2019	14	32	50	-28	4	36	219	336	453	70	143	217	275	515	756
2020	16	38	59	-31	5	40	235	387	539	78	168	257	298	598	895
2021	18	43	69	-35	5	45	251	442	632	86	193	300	320	683	1,046
2022	20	49	79	-38	6	50	268	500	733	95	220	345	345	775	1,207

Notes :  
 Negative numbers presented in Table 4-3 indicate that anticipated demands could be met or supported by existing child care facilities. Conversely, a positive number indicates demand for additional children that would be unmet or not supported by existing child care facilities. Estimates of anticipated unmet demand are presented for each year. The estimates should not be considered on a cumulative basis for the entire decade.

Source: Pedersen Planning Consultants, 2012.

## 4.5 CONCLUSIONS

At the time of this report, existing child care providers and the Wyoming Department of Family Services report that no new child care facilities or facility expansions are expected. However, the closure of two family child care homes is anticipated in May 2012.

Nevertheless, anticipated unmet demands presented in Table 4-3 suggest a future need for more child care facilities and/or expanded facilities that can support a greater amount of preschool and school age care. Modest expansions to existing child care centers, or the establishment of new child care homes and family child care centers, would probably address future demands for infant and toddler care.

Despite this conclusion, it is important to consider that the calculation of future unmet demands does not take into account all considerations that create demand in the marketplace. For example, some providers offer services that are not offered by others, e.g., part-time and full-time enrollment or extended hours of operation in the evening or on weekends. Some child care facilities are considered to provide a higher quality of service or employ personnel with good reputations among other parents.

Consequently, there are a wide range of factors that influence the choice of a parent seeking child care services.

Child care providers already in the business understand these factors. Successful child care providers tailor their businesses to meet the needs of their clients and are able to operate and sustain their businesses on a cost-effective basis. These entrepreneurs are usually very capable of discovering and capturing new clients regardless of the business climate.

New entrepreneurs or non-profit organizations entering a market such as Albany County for the first time may eventually become equally successful. However, at the outset, these potential investors should be more mindful of forecasts of future unmet demand. New businesses need to be able to financially support their operations until operations can enroll the number of children enrollments necessary to profitably operate their operations. Entering a limited market with a new child care business should prompt careful analyses by potential owners and operators.

Consequently, the conclusions presented in this report should be regarded as a starting point for the evaluation of future public and private investments in child care facilities in Albany County. The potential number of children served in each of the four age groups represents only one of a host of considerations that must be made by private entrepreneurs, non-profit organizations, and public agencies.



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