

TABLE OF CONTENTS

Executive Summary

Acronyms and Abbreviations

1.0 INTRODUCTION 1-1

 1.1 Objectives 1-3

 1.2 Key Issues 1-5

 1.3 Agency Outreach, Coordination, and Review 1-5

2.0 TECHNICAL APPROACH..... 2-1

 2.1 Data Collection 2-1

 2.2 Modeling Assumptions and Methods..... 2-1

 2.3 Analysis..... 2-2

3.0 DESCRIPTION OF CURRENT SOCIAL AND ECONOMIC CONDITIONS..... 3-1

 3.1 PRB Coal Production and Productivity Trends..... 3-1

 3.2 Production of Other Energy Resources..... 3-7

 3.2.1 Petroleum Crude Oil 3-7

 3.2.2 Natural Gas 3-8

 3.2.3 Uranium..... 3-9

 3.2.3.1 Energy Resources by County 3-10

 3.3 Changes in Population and Other Key Indicators 3-13

 3.4 Population 3-18

 3.4.1 County Population Trends 3-18

 3.4.2 Study Area in the State Context..... 3-20

 3.4.3 Components of Population Change 3-20

 3.4.4 Demographics and Household Characteristics 3-22

 3.4.5 Urbanization of the Study Area 3-23

 3.4.6 County Population Since the 2000 Census 3-24

 3.5 Economic Base..... 3-25

 3.5.1 Employment 3-25

 3.5.2 Labor Force, Unemployment, and Commuting..... 3-28

TABLE OF CONTENTS

3.5.3	Personal Income and Earnings	3-32
3.5.4	Farming and Ranching	3-36
3.6	Housing	3-39
3.6.1	Housing Stock	3-39
3.6.2	Housing Vacancy	3-39
3.6.3	Housing Mix	3-40
3.6.4	Housing Values	3-42
3.6.5	Rental Housing Cost	3-43
3.6.6	Building Permits	3-44
3.6.7	Temporary Housing	3-45
3.7	Public Education	3-48
3.7.1	Campbell County School District #1	3-50
3.7.2	Other Powder River Study Area School Districts	3-52
3.7.3	Wyoming School Foundation Program	3-56
3.7.4	Wyoming School Facilities Commission	3-57
3.8	Facilities and Services	3-59
3.8.1	Campbell County	3-59
3.8.2	Converse County	3-60
3.8.3	Crook County	3-62
3.8.4	Johnson County	3-62
3.8.5	Sheridan County	3-63
3.8.6	Weston County	3-64
3.9	Fiscal Conditions	3-65
3.9.1	Ad Valorem (Property Taxes)	3-65
3.9.2	Wyoming State Severance Taxes	3-72
3.9.3	Federal Mineral Royalties	3-74
3.9.4	Payments in Lieu of Taxes	3-77
3.9.5	Local Fiscal Conditions	3-78
3.10	Institutional and Management Capacity	3-86
3.10.1	Local Government Management	3-86
3.10.2	Community Facility Financing Mechanisms	3-86
3.10.3	Wyoming Joint Powers Act	3-87
3.10.4	The Wyoming Industrial Information and Siting Act	3-87
3.10.5	Wyoming State Land and Investment Board-administered Loans and Grants	3-88
3.10.5.1	Mineral Royalty Grant Program	3-88
3.10.5.2	Joint Powers Act Loans	3-88
3.10.5.3	Clean Water and Drinking Water State Revolving Fund Loan	3-88
3.10.5.4	Wyoming Water Development Commission Grants and Loans	3-89

TABLE OF CONTENTS

3.10.5.5	Abandoned Mine Land Grants	3-89
3.10.5.6	Transportation Enterprise Fund	3-89
3.10.5.7	Summary	3-89
3.11	Social Setting	3-90
3.11.1	Population Growth	3-90
3.11.2	Community Infrastructure and Services	3-91
3.11.3	Community Management and Institutional Structures	3-93
3.11.4	Inter-organizational Cooperation	3-93
3.11.5	Community Integration	3-93
3.11.6	Social Climate for Energy Development	3-94
3.11.7	Other Communities within the PRB	3-94
3.11.7.1	Converse County	3-94
3.11.7.2	Crook County	3-95
3.11.7.3	Johnson County	3-95
3.11.7.4	Sheridan County	3-95
3.11.7.5	Weston County	3-96
4.0	REFERENCES	4-1
5.0	GLOSSARY	5-1
APPENDIX	SUPPLEMENTAL DATA TABLES	

LIST OF TABLES

2-1	Price Adjustment Index, Nominal to 2003 Constant Dollars	2-2
3-1	Changes in Population and Other Key Socioeconomic Variables Campbell, Converse, and Sheridan Counties, Wyoming	3-14
3-2	Population of the PRB (1940-2000)	3-19
3-3	Selected Demographic and Household Characteristics (2000)	3-22
3-4	Race and Hispanic or Latino Population (2002)	3-23
3-5	2003 Population Estimates and Change Since the 2000 Census	3-24
3-6	Total Employment by County (1970 – 2022)	3-25
3-7	Employment by Industrial Sector in Eight-county Area	3-27
3-8	Employment by Type and Type of Establishment (2002)	3-27
3-9	Labor Market Conditions, 2003 Annual Averages	3-28
3-10	Relationship of Labor Force to Total Population, Campbell County (1997 – 2003)	3-30
3-11	Selected Characteristics of Personal Income (2002)	3-33
3-12	Summary of PRB Personal Income (2002)	3-35
3-13	Selected Farm Statistics (1997 – 2002)	3-37
3-14	Housing Units (1940 - 2000)	3-40
3-15	Housing Units by Structure Type (1970 – 2000)	3-42
3-16	Monthly Housing Costs in Nominal Dollars, PRB Study Area (1998-2003)	3-44
3-17	Temporary Housing Resources	3-46
3-18	Overview of Public Education Facilities in the PRB	3-48
3-19	School District Revenues by Source (2001-2002 School Year)	3-57
3-20	Taxable Valuation of Annual Coal Production in Nominal Dollars (1999-2003)	3-66
3-21	County Assessed Valuation (2003)	3-69
3-22	Estimated Ad Valorem Tax Revenue on Coal Production	3-70
3-23	Estimated Annual Severance Tax Receipts (1970-2003)	3-72
3-24	Entitlement Acreage for Federal Payments in Lieu of Taxes (Fiscal Year 2003)	3-77
3-25	Federal Payments In Lieu of Taxes in Nominal Dollars (Fiscal Years 2000 to 2004)	3-78
3-26	Federal Payments in Lieu of Taxes in 2003 Constant Dollars (Fiscal Years 2000 to 2004)	3-78
3-27	2003 Property Tax Collections by County	3-79
3-28	Sales Tax Collections, by Industrial Sector (2003)	3-80

LIST OF TABLES

3-29	Retail Sales Tax Collections by Retail Sector (2003).....	3-81
3-30	Budgeted Expenditures for Campbell County (Selected Years).....	3-82
3-31	General Government Revenues by Source, City of Gillette, in Nominal Dollars (1994 – 2003)	3-83
3-32	City of Gillette Tax Receipts, in Nominal Dollars, by Major Source (1999 – 2003).....	3-84
3-33	City of Gillette General Fund Expenditures by Major Category in Nominal Dollars (1994 – 2003) .	3-85
3-34	City of Gillette Budgeted Full-time Employees by Department (1999-2003).....	3-85

LIST OF FIGURES

1-1	Social and Economic Study Area	1-4
3-1	Statewide Coal Production (1970 - 2003)	3-1
3-2	Annual Coal Production, PRB and the Rest of Wyoming (1970 – 2003)	3-2
3-3	Annual Coal Production in the PRB by County (1970 – 2003)	3-3
3-4	Direct Employment in Wyoming’s Coal Mining Industry	3-3
3-5	Average Productivity in Wyoming’s Coal Industry (1970 - 2003)	3-4
3-6	Projected and Actual Productivity of Coal Mining in the PRB	3-5
3-7	PRB Oil Production as a Share of Statewide Production (1977 – 2002)	3-7
3-8	Oil Production by County (1977 – 2003)	3-7
3-9	PRB Gas Production as a Share of Statewide Production (1977 - 2003)	3-8
3-10	Annual Gas Production by County (1977 - 2003)	3-9
3-11	PRB Uranium Production as a Share of Statewide Production (1977 – 2002)	3-9
3-12	Annual Uranium Production by County (1977 – 2002)	3-10
3-13	Share of PRB Energy Production by Commodity Type and County	3-10
3-14	Population and Other Selected Economic and Social Indicators	3-13
3-15	Population by County (1970 to 2003)	3-14
3-16	Campbell County Population Forecasts (1977 – 2002)	3-15
3-17	County Population Trends (1940 - 2000)	3-18
3-18	Population Change in the PRB Study Area (1960s - 1990s)	3-20
3-19	Components of Population Change in the PRB Study Area (1980 – 2003)	3-21
3-20	Components of Population Change in Campbell County (1980 - 2003)	3-22
3-21	Employment by Major Industrial Sector in the PRB (1969 to 2002)	3-26
3-22	Monthly Unemployment Rate in Campbell County (1998 – 2003)	3-29
3-23	Work Force Commuting to/from Campbell County in 2000	3-31
3-24	Work Force Commuting Flows to/from Campbell County (1960 – 2000)	3-31
3-25	Per Capita Income U.S., Wyoming, and Campbell County in Nominal Dollars	3-32
3-26	Per Capita Income U.S., Wyoming, and Campbell County in 2003 Constant Dollars	3-33
3-27	Trends in Net Earnings and Non-labor Income in Campbell and Sheridan Counties (2003 Constant Dollars)	3-36
3-28	Livestock Production Indices	3-38

LIST OF FIGURES

3-29	County Housing Stock Trend (1940 – 2000)	3-39
3-30	Housing Vacancy Rates by County (1990 and 2000)	3-41
3-31	Composition of the Housing Stock in PRB Study Area (1970 – 2000).....	3-41
3-32	Average Sales Price of Houses in Nominal Dollars as Reported by County Assessors (1997 – 2002).....	3-43
3-33	Building Permits for Residential Units (1998 - 2002).....	3-45
3-34	Public School Enrollment Trends in Directly Affected Counties.....	3-49
3-35	Combined Enrollment of School Districts in the PRB Study Area (1975 – 2003)	3-50
3-36	Campbell County School Enrollment by Grade for Selected Years	3-51
3-37	Taxable Value of Annual Coal Production in Wyoming in Nominal and 2003 Constant Dollars (1969 – 2003).....	3-65
3-38	Campbell County Assessed Valuation from Natural Resources and Other Sources in Nominal Dollars	3-67
3-39	Campbell County Assessed Valuation from Natural Resources and Other Sources in 2003 Constant Dollars	3-67
3-40	Valuation on Mineral Production for Campbell County in Nominal Dollars (1994 – 2003)	3-68
3-41	Valuation on Mineral Production in Campbell County in 2003 Constant Dollars (1994 – 2003)	3-68
3-42	County Assessed Valuation Trends (1994–2003).....	3-69
3-43	Estimated Annual Ad Valorem Tax Revenue on Coal Production in 2003 Constant Dollars (1969 to 2003).....	3-71
3-44	Estimated Annual Severance Tax Receipts from Coal Produced in Campbell County and the Rest of Wyoming in 2003 Constant Dollars (1970 to 2003).....	3-73
3-45	Annual Coal Production in Wyoming – Federal Versus Non-federal Ownership (1970 – 2003).....	3-75
3-46	Federal Coal Royalties Collected on Production in Wyoming in Nominal and 2003 Constant Dollars (1980 – 2003)	3-75
3-47	Federal Royalties Collected on Wyoming Coal by Location in 2003 Constant Dollars (1987 – 2001).....	3-76
3-48	Total Budgeted Expenditures for Campbell County in Nominal Dollars and 2003 Constant Dollars (Selected Years).....	3-83