

Economic Impact Study

Grand Forks Air Force Base Realignment Executive Summary



Prepared for:

**The County of Grand Forks, ND
&
The Grand Forks Region Base Realignment
Impact Committee (BRIC)**

November 17, 2006

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Economic Impact Study of Grand Forks Air Force Base Realignment

Grand Forks Region Base Realignment Impact Committee (BRIC)

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EXECUTIVE SUMMARY

Introduction

Grand Forks Air Force Base (Grand Forks AFB) is one of the largest employers in the state of North Dakota. The base employs over 3,000 people, the annual payroll is \$127 million, and the base typically spends around \$50 million locally in contracts for construction, utilities, supplies, education, and other services. An additional 1,200 jobs in local communities depend on the needs of the base and its employees. These indirect jobs generate an annual payroll of \$33 million. This Executive Summary estimates the economic impact of losing one-third to one-half of the jobs on base on the five counties that are near the base. The five counties are: Grand Forks, ND; Polk, MN; Nelson, ND; Traill, ND; and Walsh, ND. Overall, the potential loss of about 1,000 to 1,500 jobs on Grand Forks AFB will negatively affect around one percent of the annual economic activity in the five-county region, although certain locales, businesses, and schools may experience a greater impact.

Table 1: 2000 Census Population for the Five Counties near Grand Forks Air Force Base

County	Population
Grand Forks (ND)	66,109
Polk (MN)	31,369
Traill (ND)	8,477
Walsh (ND)	12,389
Nelson (ND)	3,715
Total	122,059

The base is the home of the 319th Air Refueling Wing and hosts several tenants. It is located in Grand Forks County, ND, about 15 miles west of the City of Grand Forks. The BRAC 2005 Commission directed that Grand Forks AFB be realigned. Consequently, the Air Force (AF) will move the KC-135 tanker aircraft to other locations by 2011, and modify the base infrastructure to accommodate a new Unmanned Aerial Vehicle (UAV) mission. The AF plans to utilize the base as an operating location for Predator (MQ-1) and Global Hawk (RQ-4) UAV.

The County of Grand Forks, in conjunction with the Grand Forks Region Base Realignment Impact Committee (BRIC), commissioned The Concourse Group to analyze the estimated economic impact of the realignment on the five-county area. The Concourse Group/NAHB Research Center team based its analysis on information provided by Grand Forks AFB, and county, state, federal and private sector data. It surveyed 496 of the 2,450 military and 140 of the 385 appropriated-fund (APF) civilians who work on the base and 151 businesses in the five-county region. It also interviewed base, Department of Defense, and Department of the Air

Force personnel, local real estate and school district officials, and others in the community. It used IMPLAN software to model the data and project the estimated economic impact for the year 2011, which is the date by which realignment of the base must be complete. Although the estimates are based on the best data available at the time of the study, Grand Forks AFB is a dynamic and transient community that is constantly changing. Moreover, these estimates do not account for any other changes in the five-county region.

Impact on Employment and Contracting

The AF currently estimates that Grand Forks AFB will lose about one-third of its 2,450 military positions by 2011 due to BRAC actions, adjusted for a gain of about 170 positions related to the new UAV mission. Economic impact modeling requires the use of specific numbers and percentages in order to develop impact estimates. Based on the best available AF estimates, the team used a 34.4 percent reduction in the military positions and applied that same percentage to the APF and NAF civilian positions and to base contracts with local private sector providers in order to model the impact on the regional economy. The 385 civilian positions that directly support the base mission, such as those dealing with aircraft operations, building maintenance, finance and accounting, and legal and personnel functions are paid with appropriated funds and referred to as APF civilians. The 215 positions that provide for the social and physical well-being of the base population are paid with non-appropriated funds (NAF). These civilians work in such places as the base aquatic and bowling centers, and the golf course.

Recognizing that the base could lose additional positions due to AF decisions unrelated to BRAC 2005, such as the recently announced reduction of 40,000 AF positions worldwide, the team also projected the findings in the Executive Summary to estimate the impact of a 50 percent reduction in both military and civilian positions on the base. As shown in Table 2, if Grand Forks AFB loses one – third of its positions, it will lose about 1,000 jobs. If Grand Forks AFB loses one – half of its positions, it will lose about 1,500 jobs.

Table 2: Estimated Loss of Military and Civilian Positions (APF and NAF) on Grand Forks AFB in the Five-County Region (2005-2011)

Types of Positions	Positions on Grand Forks AFB as of September 30, 2005	Number of Jobs Lost if One-Third of the Positions on Grand Forks AFB Are Eliminated	Number of Jobs Lost if One-Half of the Positions on Grand Forks AFB Are Eliminated
Military	2,450	(841)	(1,224)
Civilians (APF & NAF)	600	(200)	(290)
Total	3,050	(1,041)	(1,514)

About \$17 million to \$25 million of the \$50 million in annual base contracts and other on-base transactions that is spent in the five-county region may be removed. These contracts are primarily in the following sectors; utilities, construction, wholesale trades, professional and scientific technical services, administrative and waste services, retail trade, and transportation and warehousing. Based on IMPLAN results, these equate to the removal of 197 to 286 jobs. These jobs are reflected in the number of indirect jobs lost shown in Table 4.

Economic Impact

The team used Minnesota IMPLAN Groups' (MIG) IMPLAN Professional software and data models of the five counties to model the impact of losing 34.4 percent of the positions on the base and the corresponding demand for goods and services in the region. The simulation scenarios were based on the conservative assumption that each job lost by someone who currently lives in the region would result in the removal of their household income from the five-county area. All impacts on economic activity are expressed in 2011 dollars.

Economic Impact on the Five-County Region and Grand Forks MSA

The model results show that between \$38.4 million and \$55.8 million of economic activity in the five-county region could be lost and that an estimated 649 to 943 indirect jobs may no longer be supported by the local economy. These indirect jobs are in addition to the 1,049 to 1,525 jobs that may be lost on the base. Total employment in the five-county area is about 83,500. Of these amounts, \$37.7 million to \$54.8 million of economic activity would be lost in the Metropolitan Statistical Area (MSA) of Grand Forks, ND and Polk County, MN.

Altogether, the impact is estimated to be between 0.9 percent and 1.4 percent of the annual economic activity of \$4.2 billion, in 2011 dollars, in the five-county area.

It should be noted that some table totals may not sum due to rounding.

Economic Impact by County

Table 3: Estimated Loss of Annual Economic Activity, by County

County	Estimated loss of Annual Economic Activity if Grand Forks AFB Loses About 1,000 Positions	Estimated loss of Annual Economic Activity if Grand Forks AFB Loses About 1,500 Positions
Grand Forks	(\$35,693,168)	(\$51,879,604)
Polk	(\$2,042,659)	(\$2,968,981)
Nelson	(\$215,879)	(\$313,777)
Traill	(\$291,059)	(\$423,051)
Walsh	(\$114,254)	(\$166,067)
Total	(\$38,357,019)	(\$55,751,481)

Table 4: Estimated Loss of Indirect Jobs, by County

County	Estimated Loss of Indirect Jobs if Grand Forks AFB Loses About 1,000 Positions	Estimated Loss of Indirect Jobs if Grand Forks AFB Loses About 1,500 Positions
Grand Forks	(597)	(868)
Polk	(39)	(57)
Nelson	(4)	(7)
Traill	(6)	(8)
Walsh	(2)	(3)
Total	(649)	(943)

Table 5: Estimated Annual Loss of State and Local Taxes

County	Estimated loss of State & Local Taxes if Grand Forks AFB Loses About 1,000 Positions	Estimated loss of State & Local Taxes if Grand Forks AFB Loses About 1,500 Positions
Grand Forks	(\$3,698,281)	(\$5,375,408)
Polk	(\$290,803)	(\$422,678)
Nelson	(\$34,321)	(\$49,885)
Traill	(\$41,040)	(\$59,651)
Walsh	(\$6,887)	(\$10,010)
Total	(\$4,071,331)	(\$5,917,633)

Economic Impact by City

The IMPLAN model does not allow the user to project the county-level impact to individual cities, and modeling of separate small cities could be problematic. Therefore, the team developed projections of city-level impacts using U.S. Department of Census data, residential

information provided by Grand Forks AFB, and information gathered through online surveys of military and APF civilians who work on base. Project staff used proportionate data representing categories, such as a city's share of the county's population, which seemed most likely to approximate the actual share of specific categories of county-level impact. The table below presents the results of applying such shares.

Table 6: Estimated Loss of Annual Economic Activity, by County and by City

County	City	Estimated Loss of Economic Activity if Grand Forks AFB Loses About 1,000 Positions	Estimated Loss of Economic Activity if Grand Forks AFB Loses About 1,500 Positions
Grand Forks	Emerado	(\$289,084)	(\$420,180)
	Grand Forks	(\$33,710,853)	(\$48,998,333)
	Larimore	(\$551,039)	(\$800,929)
	Northwood	(\$348,958)	(\$507,206)
	Rural Areas in Grand Forks County	(\$320,039)	(\$465,173)
	Other Cities in Grand Forks County	(\$473,194)	(\$687,782)
	Polk	Crookston	(\$598,389)
East Grand Forks		(\$1,193,666)	(\$1,734,980)
Rural Areas in Polk County		(\$19,401)	(\$28,199)
Other Cities in Polk County		(\$231,204)	(\$336,052)
Nelson	Lakota	(\$49,976)	(\$72,640)
	McVille	(\$30,855)	(\$44,847)
	Michigan	(\$61,066)	(\$88,759)
	Petersburg	(\$51,958)	(\$75,520)
	Rural Areas in Nelson County	(\$5,919)	(\$8,603)
	Other Cities in Nelson County	(\$16,105)	(\$23,408)
Traill	Hatton	(\$101,113)	(\$146,966)
	Hillsboro	(\$76,326)	(\$110,939)
	Mayville	(\$73,009)	(\$106,118)
	Portland	(\$15,928)	(\$23,150)
	Rural Areas in Traill County	(\$5,794)	(\$8,422)
	Other Cities in Traill County	(\$18,890)	(\$27,456)
Walsh	Edinburg	(\$2,819)	(\$4,098)
	Fordville	(\$7,054)	(\$10,253)
	Grafton	(\$66,039)	(\$95,987)
	Hoople	(\$2,176)	(\$3,163)
	Park River	(\$19,951)	(\$28,998)
	Rural Areas in Walsh County	(\$844)	(\$1,227)
	Other Cities in Walsh County	(\$15,370)	(\$22,341)
	Total		(\$38,357,019)

Grand Forks AFB, including official and family and friends travel, accounts for about 13,000 of the 180,000 passenger arrivals and departures at Grand Forks International Airport, or about 7 percent of the passenger traffic. A portion of this traffic will be lost if the base loses about 1,000 to 1,500 positions. The base accounts for very little of the airport's cargo traffic.

The team surveyed 151 local businesses to determine in what ways they expected to be affected by the downsizing of Grand Forks AFB. Sixty-two percent expected the loss of jobs on Grand Forks AFB to affect their businesses.

Impact on the Real Estate Market

The team used both statistical and empirical data, consulted numerous sources, including local public officials, real estate brokers, real estate developers, and entrepreneurs, as well as publications and reports from national research organizations, financial rating agencies, and governmental agencies to estimate the impact on the real estate market of the base realignment. Grand Forks AFB provided information on where military and APF civilian employees currently live.

In general, the Grand Forks real estate market has been robust, with the exception of the downtown office sector, exhibiting strength in the housing, industrial, and retail sectors. The weakness in the office market is largely a result of high vacancy in the Central Business District, which is beginning to slowly recover as other uses, such as retail and residential uses, are being found for vacant office space. There have been numerous real estate projects completed within the past few years, and several more are either under construction or in the planning stages. Because of the robust market, the diverse economy, and growth initiatives such as emphasis on research, technology, and aerospace, the loss of about 1,000 to 1,500 positions on Grand Forks AFB is not expected to adversely affect the commercial sectors of the real estate market.

It is anticipated that the greatest impact on real estate resulting from the Grand Forks AFB realignment will be on the housing market. Table 7 shows where 366 AFP civilians and 2,300 military households live. Table 7 does not show where NAF civilians, contractors who work on the base, and people in indirect jobs that depend on the base live. Most of these people live in the five-county region, but Grand Forks AFB does not track their residential information.

Table 7: Current Location of Military and Civilian Households (APF)
by County, City, and Zip Code

County	City	Zip Code	Civilian Households	Military Households	Total Households From Grand Forks AFB	
Grand Forks	Arvilla	58214	19	9	28	
	Emerado	58228	25	35	60	
	Gilby	58235	3	2	5	
	Grand Forks	Various	200	615	815	
	Grand Forks AFB	Various	0	1,449	1,449	
	Larimore	58251	35	45	80	
	Manvel	58256	0	4	4	
	McCanna	58251	0	3	3	
	Mekinock	58258	3	6	9	
	Niagara	58266	3	0	3	
	Northwood	58267	3	21	24	
	Thompson	58278	19	6	25	
	Subtotal			310	2,195	2,505
	Polk	Crookston	56716	0	2	2
East Grand Forks		56721	26	58	84	
Euclid		56722	0	5	5	
Subtotal				26	65	91
Nelson	Michigan	58259	3	0	3	
	Petersburg	58272	3	9	12	
	Subtotal			6	9	15
Traill	Hatton	58240	20	16	36	
	Buxton	58218	2	0	2	
	Hillsboro	58045	0	4	4	
	Mayville	58257	0	6	6	
	Subtotal			22	26	48
Walsh	Ardoch	58261	2	0	2	
	Fordville	58231	0	4	4	
	Grafton	58237	0	1	1	
	Subtotal			2	5	7
Total			366¹	2,300	2,666	

¹ About 366 of the 385 APF civilians who work on base live in the five-county region; the remaining 19 live out of the five-county area. Since about 10 percent of married military personnel are married to other military personnel, the 2,450 active duty military personnel at Grand Forks AFB represent about 2,303 households. Three of these households are estimated to live out of the five-county region. A household can be a single person or a family.

As of February 2006, the vacancy in the apartment market was 5.4%, and as of May 2006, average home prices in Grand Forks are up 2.7% over 2005. Based on information provided by the Grand Forks City Planner, there are 839 new home sites currently approved or in the approval process. Additionally, there is significant housing construction activity in the downtown market, with several housing projects that have recently been completed, are planned, or are in various stages of development.

Total residential construction in the Grand Forks, ND-MN Metropolitan Statistical Area (MSA) was valued at \$64,073,000 in 2005, and is projected to be \$77,879,000 in 2006, representing a 22 percent increase. Single-family construction in 2005 in the Grand Forks MSA was valued at \$46,121,000 and multifamily housing construction was valued at \$17,952,000. In 2006, the value of single-family and multifamily construction is projected to be \$45,763,000 and \$32,116,000, respectively.

While the housing market is currently robust, the realignment could have a significant negative impact on the housing market if all of the losses occur within a condensed period. If the losses are staggered, the impact would be somewhat less substantial. Based on the estimated direct and indirect job losses as a result of the realignment, and the conservative assumption that every job lost will result in one less household, it is projected that up to 522 homes would come on the market for sale and 512 homes would become available on the rental market in Grand Forks County alone.

Additionally, for the surrounding counties, assuming that the same proportion of residents who lose their employment as a result of the realignment that are renters and those that are homeowners is the same as for the general population, then based on data from the 2000 Census, the resulting impact on the combined owned and rental housing vacancy rates would be as follows:

Grand Forks County – Increase in housing vacancy rate of 3.81% from 7.1% to 10.91%.

Polk County – Increase in housing vacancy rate of 0.53% from 13.8% to 14.33%.

Nelson County – Increase in housing vacancy rate of 0.55% from 19.2% to 19.75%.

Trail County – Increase in housing vacancy rate of 0.63% from 9.9% to 10.53%.

Walsh County – Increase in housing vacancy rate of 0.08% from 12.6% to 12.68%.

Table 8: Estimated Number of Households Lost Off-Base, by County

County	Estimated Military Households Lost	Estimated Civilian Households Lost	Estimated Indirect Jobs Households Lost	Estimated Households Lost if the Base Loses About 1,000 Positions
Grand Forks (off base)	(257)	(180)	(597)	(868)
Polk	(22)	(9)	(39)	(57)
Nelson	(3)	(2)	(4)	(7)
Trails	(9)	(8)	(6)	(8)
Walsh	(2)	(1)	(2)	(3)
Total	(293)	(200)	(649)	(943)

IMPACT ON SCHOOLS

Kindergarten – 12th Grade

There are currently about 1,100 students in kindergarten through 12th grade who have a military or federal civilian parent who works on Grand Forks AFB. The base has its own school district and school board. There are two schools located on the base, with 566 students in kindergarten through 8th grade. The Grand Forks AFB Public School District contracts with the Grand Forks Public School District to administer these on-base schools and to educate an additional 280 students, about 150 of whom attend Central High School in Grand Forks. About 250 more students attend schools in other public school districts and private schools in the area. There are between 80 and 100 students in each of grades K through 8, and about 60 in each of grades 9-12. The 636 respondents to the military and APF civilian surveys that the team conducted identified 38 schools that their children attended.

If one-third to one-half of these 1,100 students left, there would be 375 to 550 fewer students in area schools and a proportionate reduction in teachers, other school support positions, and revenue from local, state, federal and other sources, including Impact Aid.

The following table shows the public school districts with the highest number of federally-connected students associated with Grand Forks AFB and the amount of Impact Aid the US Department of Education paid these districts in Fiscal Year 2006. The enrollment figures for FY 2006 payments are over 4 years old. Since then, the number of students from the base has already declined by about 400. For example, the number of students from the base in the Grand Forks AFB/Grand Forks Public School Districts alone has decreased from 1,150 in the 2001-2002 school year to about 850 in the 2006-2007 school year.

Table 9: Public School Districts that Received Impact Aid in Fiscal Year 2006, Based on Enrollment in the 2001-2002 School Year

Public School District	Grand Forks AFB Military Parent	Grand Forks AFB Federal Civilian Parent	Total Grand Forks AFB Dependents (3 Years Ago)	Impact Aid (Paid in FY 2006)
Grand Forks AFB & Grand Forks	1,150	0	1,150	\$6.9 Million
Emerado	12	52	64	\$11,836
Hatton	31	7	38	\$13,038
Larimore	34	62	96	\$18,216
Northwood	21	27	48	\$12,180

When a school district loses a federally-connected student, it loses more than just the Impact Aid associated with that student. In general, it loses the revenue per student derived from local, state, federal, and other sources. Table 10 shows the amount of revenue per student that the public school districts in the five-county area received. For example, if the Emerado School District loses one student, it loses about \$18,000 in school revenue annually. If the Grand Forks AFB/Grand Forks School Districts lose one student they lose about \$9,000 in annual revenue.

In general, the student population in North Dakota is decreasing. On average, the 5-year enrollment trend for public school districts in North Dakota is a minus 8.4 percent. However, some of the school districts in the five-county region are losing students at a faster rate. For example, Emerado enrollment dropped from the 72 students shown below in the 2004-2005 school year to 63 students in the 2006-2007 school year, Hatton dropped from 240 to 222 students this year, and Larimore dropped from 534 to 486 students last year.

Table 10: Amount of Revenue Per Student, by County and by School District
(2004-2005 School Year)

County	School District	Number of Students	Total Revenue	Revenue Per Student
Grand Forks	Emerado 127	72	\$1,293,942	\$17,971
	Grand Forks & Grand Forks AFB	7,525	\$68,660,468	\$9,124
	Larimore 44	534	\$3,712,127	\$6,952
	Manvel 125	144	\$1,658,685	\$11,519
	Midway 128	265	\$2,264,098	\$8,544
	Northwood 129	315	\$2,556,476	\$8,116
	Thompson 61	416	\$2,524,447	\$6,068
	Polk	Climax	146	\$2,285,573
Crookston (ASE)		1,469	\$14,819,202	\$10,088
East Grand Forks		1,723	\$14,266,829	\$8,280
Fertile (ASE)		533	\$5,830,860	\$10,940
Fisher		294	\$2,996,943	\$10,194
Fosston		650	\$6,399,041	\$9,845
Win-E-Mac (ASE)		542	\$5,126,265	\$9,458
Nelson		Dakota Prairie 1	299	\$3,089,491
	Lakota 66	232	\$1,852,220	\$7,984
Traill	Central Valley 3	274	\$1,924,452	\$7,024
	Hatton 7	240	\$1,936,269	\$8,068
	Hillsboro 9	411	\$3,088,548	\$7,515
	May-Port CG 14	583	\$3,921,286	\$6,726
Walsh	Adams 128	75	\$874,915	\$11,666
	Edinburg 106	128	\$952,872	\$7,444
	Fordville-Lankin 5	104	\$1,161,034	\$11,164
	Grafton 3	963	\$5,987,369	\$6,217
	Minto 20	231	\$1,650,688	\$7,146
	Nash 51	15	\$299,836	\$19,989
	Park River 78	404	\$3,004,563	\$7,437

Universities and Technical Schools

About 1,400 military personnel and large numbers of their spouses and dependents, as well as many civilian personnel who work on base take classes in local universities and technical schools, several of which offer classes on base.

Table 11: Percent of 636 Military and APF Civilian Survey Respondents Who Said Members of Their Households Attended Higher Education Classes in the Last 12 Months

Survey	Respondents	Spouses	Dependent(s)
Military Survey (496 respondents)	27%	16%	2%
Civilian Appropriated-Fund Employee Survey (140 respondents)	18%	20%	10%

Table 12: Amount of AF Tuition Assistance Paid to Local Universities and Technical Schools and the Number of Grand Forks AFB Students (FY 2005)

Universities & Technical Schools	Amount of Tuition Assistance the AF Paid in FY 2005	Military Students	Dependents & Grand Forks AFB Civilian Students	Total Grand Forks AFB Students
Lake Region State College	\$385,417	664	350	1,014
Park University	\$266,448	396	240	636
Embry-Riddle Aeronautical University	\$158,718	210	1	211
University of Mary	\$59,750	81	Not Available	81*
Northland Community and Technical College	\$18,900	15	Not Available	15*
Central Michigan University	\$12,750	17	42	59
University of North Dakota	\$12,144	13	Not Available	13*
Total	\$914,127	1,396		2,029*

*Does not include all AFB dependents

For some of these schools, the students affiliated with Grand Forks AFB represent most of their student body in the region. For example, 1,014 of the 1,300 students at Lake Region State College are connected with the base; 636 of the 750 students at Park University are connected with the base; and 211 of the 287 students at Embry-Riddle Aeronautical University are connected with the base. The timing of the drawdown of current jobs on the base and the influx of new jobs to support the UAV mission, along with the potential for offering new areas of study, will be critical for most of these schools.

If one-third to one-half of these 2,000 plus students were eliminated, it would mean a loss of 670 to 1,000 students, and some of the over \$1 million in Air Force Tuition Assistance and other funding associated with them.

The 2006-2007 school year tuition rates per student are provided below as a partial indicator of revenue per student. For example, if Park University loses one military student who is taking a 3-credit hour class at \$166 per credit hour, it will lose \$498 in tuition, plus additional

payments for such things as lab fees, textbooks, and supplies, which depend on the course. These rates do not reflect federal and state funding which the public schools receive.

Lake Region State College

- \$175 per credit hour for online learning.
- \$142 per credit hour for classes on both the Devil's Lake campus and on the base.
- \$2,550 full-time tuition for the academic year on the Devil's Lake campus.

Park University

- \$166 per credit hour for active duty military personnel.
- \$240 per credit hour for non-military students.
- \$16,025 per year for the nursing program on campus.

Embry-Riddle Aeronautical University

- \$184 to \$865 per credit hour for undergraduate courses.
- \$307 to \$895 per credit hour for graduate courses, depending on the course.

University of Mary

- \$350 per credit hour for undergraduate courses.
- \$445 per credit hour for graduate courses.
- \$375 per credit for online courses.
- \$5,550 per semester for full-time undergraduate courses.
- \$5,950 per semester for full-time physical therapy and occupational therapy courses.

Northland Community and Technical College

- \$139 per credit hour.
- \$2,426 per semester for full time.

Central Michigan University

- \$286 per credit hour for undergraduate courses.
- \$373 per credit hour for graduate courses.
- \$250 per credit hour for active duty military personnel.

University of North Dakota (North Dakota residents)

- \$303.43 per credit hour.
- \$5,792 for the academic year, full time, for undergraduate courses.
- \$6,154 for the academic year, full time, for graduate courses.

IMPACT ON SOCIAL SERVICES

Grand Forks AFB is a small city with over 5,000 people associated with military members (that includes both airmen and their dependents) and over 1,000 civil service and contractor personnel who work on base. The base provides for many of the social service needs of the military personnel and their family members. Because of this, the team believes a reduction of 1,000 to 1,500 military positions may have little impact on local community social services and special needs facilities.

However, people associated with the base are also contributors to local churches, social service, and non-profit organizations and the base itself plays a large role in the community.

Table 13: Estimated Annual Contributions to Religious and Social Advocacy Organizations That Will Be Lost

Types of Organizations	If 1,000 Grand Forks AFB Positions Are Lost	If 1,500 Grand Forks AFB Positions Are Lost
Religious organizations	(\$78,637)	(\$114,298)
Grant making and giving and social advocacy organizations	(\$44,619)	(\$64,853)
Total	(\$123,256)	(\$179,151)

The report provides details of the various analyses presented in this Executive Summary based on the loss of about one-third of the military jobs on base. The estimates of the economic impact of the Grand Forks AFB BRAC 2005 realignment on the five-county region are based on the most current data available for each of the topics discussed. This study presents a picture of the economic effects of currently-projected realignment actions through 2011. However, the realignment of Grand Forks AFB over the next 5 years will not be a static process. AF plans are evolving, and it may make changes in the timing and scope of the realignment. These changes may significantly alter the estimated impacts described in this report. Moreover, the report does not consider the impact of any other developments in the five-county region.

OTHER FACTORS AND THE FUTURE

When a regional economic driver is changed, the future becomes filled with uncertainties and opportunities. The future of GFafb and the five-county region is definitely in this situation. There are numerous current opportunities that could impact the region's economic future. They include:

- The expansion of GFafb manpower levels to support the UAV mission past 2011.
- The size and timing of manpower levels and infrastructure to support the Global Hawk mission.

- The potential of GFAFB being assigned the next generation of tankers.
- The community's work on economic diversification centering on aerospace, energy, broadband connectivity and life sciences.