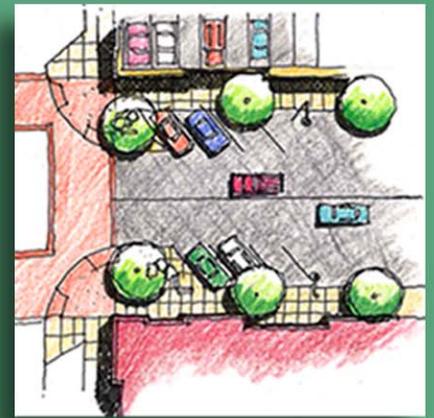
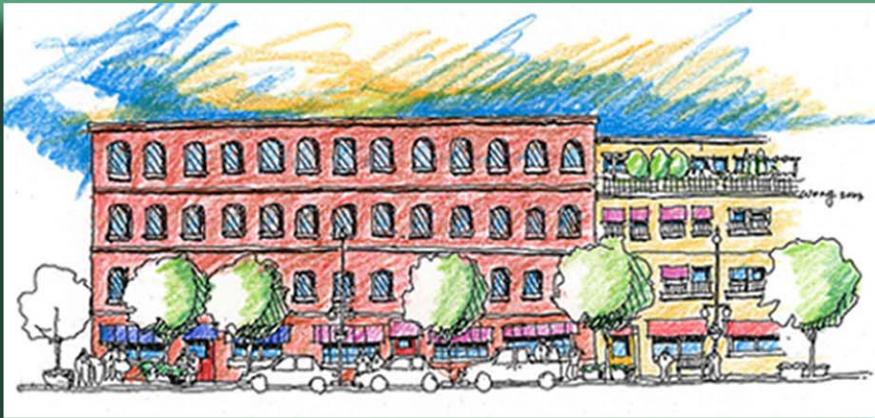


# APPENDIX

## Downtown Mandan and Memorial Highway Market Study



City of Mandan, North Dakota

**URS**

May 2003

*Market Study for Downtown Mandan and The  
Strip, Mandan, North Dakota*

*Prepared for: The City of Mandan, North Dakota*

*May 27, 2003*

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## ***EXECUTIVE SUMMARY***

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The following market analysis for the City of Mandan's Downtown Study Area and the Strip Study Area will be used to guide a coordinated long-range redevelopment plan for these areas. The market research for this report was completed in January 2003. The Downtown Study Area is generally bounded by 6<sup>th</sup> Avenue NW on the west, 2<sup>nd</sup> Street on the north, 6<sup>th</sup> Avenue NE on the east and the Burlington Northern Santa Fe (BNSF) Railroad on the south. The project boundaries of the Strip Study Area generally include the surrounding properties along Memorial Highway between the BNSF underpass on the west and the I-94 interchange on the east, in addition to 46<sup>th</sup> Street between Memorial Highway on the north and McKenzie Dr SE on the south. Project boundary maps are shown on pages 11 and 13 of this report.

This report examines the market potentials for new and in-fill development of the following uses in regards to the long-term redevelopment of the Downtown and Strip Study Areas:

- Office
- Residential
- Retail/Entertainment
- Convention/Hotel

### ***Methodology***

The findings and recommendations set forth in this report are based on a combination of several data resources and research methods. Listed below are the tasks completed for the market analysis of the Study Areas.

- Analyzed secondary data evaluating the demographic, employment, household, retail sales, and Multiple Listing Services (MLS) information at the trade area, City, County, State, and national levels.
- Conducted key community stakeholder interviews, such as key City personnel, representatives of the real estate industry, and community business and educational leaders and residents regarding the Study Areas and the market conditions for the above mentioned uses within Mandan. A complete list of the persons interviewed for this project is provided in the report's appendix.
- Surveyed select potential office development projects, interviewed pertinent developers and brokers to help assess office potentials for the Study Areas.
- Surveyed the numerous condominium/apartment/senior living development projects that have recently been completed, currently under construction, or are in planning, to help assess the future residential potentials for the Study Areas.
- Evaluated the national retail coverage patterns of major retail categories within the Bismarck/Mandan metropolitan area to determine current market conditions and potential future competition. These national retail categories include:

- Book Stores
  - Discount Stores
  - Electronic and Office Supply Stores
  - Fashion Department Stores
  - Fashion Specialty Stores
  - Grocery Stores
  - Drug Stores
  - Home Improvement Stores
  - Movie Theaters
  - Off-Price Retailers
  - Sporting Goods
  - Auto Dealers
  - Auto Part Retailers
  - Hotel
- Surveyed the retail development projects that have recently been completed, currently under construction, or are in planning, to help assess the future retail potentials for the Study Areas.
  - Surveyed convention/hotel facilities in the Bismarck-Mandan area to help assess future convention/hotel potentials for the Study Areas.
  - Reviewed the following past plans and studies:
    1. City of Mandan Peer Exchange Final Report, prepared by The International Economic Development Council, May 17, 2002
    2. Bismarck-Mandan Metropolitan Area Long range Transportation Plan, prepared by ULTEIG Engineers, Inc., August 2001
    3. Final Executive Summary: Bismarck-Mandan Employer and Resident Surveys, prepared by The Wadley-Donovan Group, April 19, 2001
    4. Final Bismarck-Mandan Resident Survey Results: Executive Summary, prepared by The Wadley-Donovan Group, April 19, 2001
    5. Final Bismarck-Mandan Employer Survey Results: Executive Summary, prepared by The Wadley-Donovan Group, April 19, 2001
    6. Master Facilities Plan, Department of Health State of North Dakota, prepared by Triebwasser Helenske & Associates and Earl Walls Associates, June 2000
    7. Mandan Economic Development Strategy Final Report, prepared by Economics Research Associates, June 1993
    8. Downtown Area Development Plan, Mandan, North Dakota, prepared by Dean Monteith, 1987
    9. Central Business District Needs Analysis Study, Mandan, North Dakota, prepared by K. Bordner Consultants, 1981

### ***Conclusions and Recommendations***

As a result of our research and analysis, a number of redevelopment/development opportunities have been identified for the Downtown and the Strip Study Areas. These opportunities are highlighted below, as well as presented in detail in the following sections of this report.

### ***Downtown Study Area***

The following potential developments are recommended for the Downtown Study Area:

#### **Office Potentials**

- Select site of North Dakota department and agencies
- Bismarck State College expansion (office and classroom space)
- Local business expansion
- Native American Businesses
- Creation of a business incubator

#### **Residential Potentials**

- Condominiums, 24-32 units
- Rental Apartments, 30-40 units
- Encouragement of area wide home improvement through rehabilitation and systematic code enforcement

#### **Retail Potentials**

- Niche retail, such as specialty apparel shops, Native American collectables, art boutiques, and hand crafted jewelry
- Casual/family dining restaurant

#### **Event Facility Potentials**

- Civic Center facility

### ***The Strip Study Area***

The following potential developments are recommended for the Strip Study Area:

#### **Office/Flex-Space Potentials**

- Office complex for select State of North Dakota departments and agencies
- Local business expansion in need of office/flex-space
- Native American Businesses in need of office/flex-space

#### **Retail Potentials on the Western End of the Strip**

- Car/mobile home/boat dealerships
- Farm implements
- Warehousing/self storage

#### **Retail Potentials on the Eastern End of the Strip and along 46th Ave SE**

- Regional big box retail, such as *Home Depot*, *Meijer's*, *Best Buy* or *Circuit City*
- Fashion Department Store such as *Kohl's*
- Casual/family dining restaurant
- Neighborhood retail such as a freestanding drug store or video store

#### ***Office/Institutional Market Conclusions***

Attracting new office development - a driver in employment, is key to the redevelopment of the Downtown and the Strip Study Areas, as well as the overall

economic well being of the City of Mandan. By building employment in the Study Area, overall economic activity will be stimulated, increasing the demand for shopper/ convenience goods, professional services, food and entertainment, as well as residential development.

Unfortunately, the City of Mandan is currently in a difficult position to attract new office and institutional development due to the existing concentration of office space and post-secondary educational institutions in neighboring Bismarck. To help overcome perceptions of Mandan being an inferior employment center location due to its older building stock and accessibility issues, the City must target specific office niches to help grow its office base and employment.

Through our interviews with local businesses and institutions we identified such development niches, which include the following office and institutional development/expansion opportunities:

- State government department and agencies
- Bismarck State College (office and classroom space)
- Local business expansion
- Native American businesses
- Creation of business incubator

A critical component to successful business attraction is the use of public assistance to provide the gap financing necessary to create space of equal or better quality with lower lease rates than the building inventory located in Bismarck. Recommended local economic development tools that the City could use to help attract businesses and institutions in the area include:

- Land and building acquisitions
- Land write-downs
- Building write-downs
- Property tax abatements
- Tax increment financing (TIF)
- Low interest loan programs
- Renaissance Zones

These tools, as well as State and Federal funding tools, are discussed in more detail in the Economic Development Tools Section of this report.

### **Recommended Locations**

The recommended location for potential business development strongly depends of the particular needs of each of the businesses. General office is recommended to be located in the downtown area to help bring employment and activity to the area. Many of the existing underutilized buildings could be renovated to fit the needs of today's office users, such as: efficient office design layout, internet accessibility, and energy efficient buildings.

For businesses seeking office/flex-space, this type of space is recommended for the Strip, particularly on the west end of Memorial Highway. This area of the Strip is currently industrial/warehouse in character and such similar uses should be encouraged to continue. There is available vacant land on the west end of Memorial Highway which

could be targeted for flex-space users, such as construction related businesses, warehousing, and distribution.

#### **State Government Department and Agencies**

The Strip, with its ample vacant land, is the recommended location for a potential new State government office complex. A Strip location is favored over a downtown location, since the Strip is closer to Bismarck, minimizing the commute time for its employees and the distance to the Capital grounds. However, the Department of Health has also expressed interest in relocating to a Downtown Mandan location.

#### **Bismarck State College (BSC)**

There are a number of vacant and underutilized buildings in the downtown area, which could be utilized by BSC for various vocational/technical programs, as well as for office space use. A downtown location for BSC would be appropriate since close proximity to Bismarck is not critical to its operations as compared to the various State agencies. Due to the services and programs it offers, BSC becomes a destination wherever it is located, drawing its users to its facilities. However, it is important for BSC to have the appropriate type of space to accommodate specific programs. It may require open flex-type space to accommodate its various vocational/technical programs and such space may not be available in the downtown.

#### **Residential Market Conclusions**

##### **The Downtown Study Area**

The Downtown Study Area is recommended for future residential development. Residential development in this area could help revitalize the downtown by bringing people into the area, helping to create an active and vibrant downtown. Persons looking to be near the downtown stores, business and government services, cafes and restaurants, should find the downtown as a desirable place to reside. In terms of residential development, denser housing types, such as condominium and rental developments, and mixed-use developments are recommended for the downtown to maximize the immediate population density to help create an energized and growing downtown area.

Currently, the downtown is built-out and does not have sites available for new residential construction. If the building stock in the downtown remain as is, it is recommended that the upper floors be renovated and converted into market rate apartments. However, if it is determined that building demolition will be required for environmental remediation, it is recommended that some of these cleared sites be used for new residential development. Due to the uncertainty and the many unknowns that currently exist with the environmental contamination, it is difficult to identify redevelopment sites and project the number of new residential units that could be built in the downtown area. Therefore, the projected number of residential units presented in the below table are solely based on market demand factors and not on land availability.

##### **Residential Product**

The following table highlights the recommended residential development program for downtown. The recommended development program is based on analysis of current and historical residential development trends within the Bismarck-Mandan area, key

interviews with real estate professionals and developers in the area, as well as a survey of rental and for-sale residential development projects in Mandan and Bismarck.

**Recommended Residential Development Program**

<b>Unit Type</b>	<b>Number of Units</b>	<b>Unit Size (sf)</b>	<b>Number of Bedrooms / Baths</b>	<b>Sales Price/ Monthly Rent</b>	<b>Target Market</b>
Condominiums	24 - 32	1,200 - 1,400	2 / 1.5	\$100,000 - \$120,000	Empty Nesters, retirees, single adults
Rental Apartments	30 - 40	700 - 800 1,000 - 1,200	1 / 1 2 / 1-1.5	\$500 - \$625 \$650 - \$700	Retirees, young couples, students, single adults
<b>Total Units</b>	<b>54 - 72</b>				

Source: URS Corporation

As presented in more detail later in the report, our market research indicated that there would not be a large enough demand to warrant residential development projects to be built specifically for the student and/or senior market. But rather, the target markets for the proposed developments would be a mix of empty nesters, retirees, students, young couples, and single adults.

**The Strip Study Area**

The Strip's physical and economic characteristics do not support residential development. Currently, the Strip is where the majority of the economic growth is occurring in Mandan with new retail and business openings and it is recommended that the Strip be reserved for similar developments in the future. Recognizing the Strips' economic importance to the City of Mandan, residential development would not be the highest and best use for this area.

**Area Wide Home Improvement Strategy**

In addition to the new residential construction recommended for the downtown area, a rehabilitation program for the existing housing in the surrounding blocks north of downtown is recommended. Improvements to the neighboring residential area will help improve the appearance, character, and property values of the neighborhood, which in turn will have a positive affect on the image of downtown and will draw additional residents to the downtown area. Ways in which to promote such investment and improvements are presented in the Residential Market Analysis Section of this report.

**Retail Market Conclusions**

**The Downtown Study Area**

Since a concentration of national retailers has been developed in neighboring Bismarck, it will be difficult to attract such retailers to a Downtown Mandan location. In addition, the downtown is not highly trafficked, which is a critical criterion for national retailers in selecting site locations. Taking this into consideration, niche retail should be targeted in the downtown, creating a retail destination area different from what currently exists in Bismarck.

Potential types for niche retailers could include:

- Specialty apparel shops,
- Native American collectables
- Art boutiques
- Hand crafted jewelry

Targeting such boutique type stores would help compliment similar types of stores that already do business in downtown Mandan, such as the *Five Nation's Arts, For the Birds & More*, and *Mandan Western Shop*.

### **The Strip Study Area**

The western end of the Strip has a number of large tracts of available vacant land that could be developed as highway commercial. This area exhibits strong market potential for commercial use such as car/mobile home/boat dealerships, farm implements, and warehousing/self-storage. If such development is encouraged, this area could easily become a regional draw for car/mobile home/boat dealerships, building upon the current concentration of dealerships along Memorial Highway and on East Main Street.

The Strip's east end is in close proximity to both Bismarck and Interstate 94. Due to its easy accessibility to the larger Bismarck market and since large tracts of vacant land are available for development, it is recommended that this area be developed as large scale, big-box regional retail operators such as *Home Depot* or *Meijers*. Also, in its favor is the adjacent large upscale residential subdivision, which is currently under development. Completion of this development will increase the area's attractiveness to potential national retailers, since there will be a larger population and disposable income base to draw from.

### ***Convention/Hotel Market Conclusions***

Based on interviews with local meeting and hotel professionals in the Bismarck-Mandan area, URS concludes that there is not demand to support another full-service hotel in Mandan. Neither study area location is suitable for such development, in that they are not easily accessible to the majority of hotel visitors, who typically want to be near the Bismarck office market and/or the airport. Currently, there is no incentive for the hotel visitor to drive to Mandan while there is an ample number of hotels to choose from in Bismarck.

We found that between the *Seven Seas Best Western*, the *Ramkota Inn*, the *Radisson*, and the *Bismarck Civic Center*, meeting/conference/convention space demand is sufficiently being met. The Civic Center's Arena and Exhibit Hall can accommodate groups between 1,000 to 10,000 persons and its 15 meeting rooms can accommodate smaller groups between 10 – 800 persons. The larger hotels can accommodate small meeting groups, as well as larger groups, ranging between 200 – 1,300 persons.

However, we did identify the need for a civic center, accommodating 100-300 people. Currently, the *Mandan Community Center's* gymnasium is being used almost every weekend for events such as flea markets, art shows, weddings, gun shows, and auctions. The Park District ultimately would like to use this space for athletic programs and activities on the weekends rather than the above-mentioned events. Downtown would be an ideal location for a community events center due to its centralized

location. The civic center would help bring people to the downtown, creating an active and energized town center.

### ***Economic Development Tools Conclusions***

Large-scale redevelopment projects, such as Downtown Mandan, require a combination of funding tools from various levels of government. Due to the complexity and diversity of issues typically involved in redevelopment projects, such as environmental, transportation, infrastructure, land acquisition/assembly, building demolition/rehabilitation, and business recruitment issues, a municipality needs a number of resources to tap to help address the varying aspects of the redevelopment project. However, locally controlled economic development tools cannot be stressed enough. This is because, local funding tools, such as TIF, property tax abatements, land acquisition/write-downs, empower municipalities to guide redevelopment and provide timely assistance, which is critical to today's development projects.

The following economic development tools are recommended to help foster economic growth within the City of Mandan:

### ***Local Funding Tools***

- TIF
- Mandan Growth Fund
- Property tax abatements
- Land assembly and write-down
- Building acquisition and write-down
- Guarantee of property value
- Permit fees waived
- Special Service Areas (SSAs)/Business Improvement Districts (BIDs)
- Low interest/forgivable loan programs

### ***State Funding Tools***

- Renaissance Zones
- State Administered Community Development Block Grant (CDBG) Funding
- MATCH Program
- PACE Fund
- Income tax exemption and incentives
- Job Training Assistance
- Business Development Loan Programs
- North Dakota Development Fund
- Strategic Partners

### ***Federal Funding Tools***

- Section 108 Loan Guarantee Program
- Economic Development Initiative (EDI) Grants
- Brownfields Economic Development Initiative (BEDI) Grants
- U.S. EPA Brownfield Assessment Grants
- U.S. EPA Brownfield Revolving Loan Fund Grants
- U.S. EPA Brownfield Cleanup Grants

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# OVERVIEW

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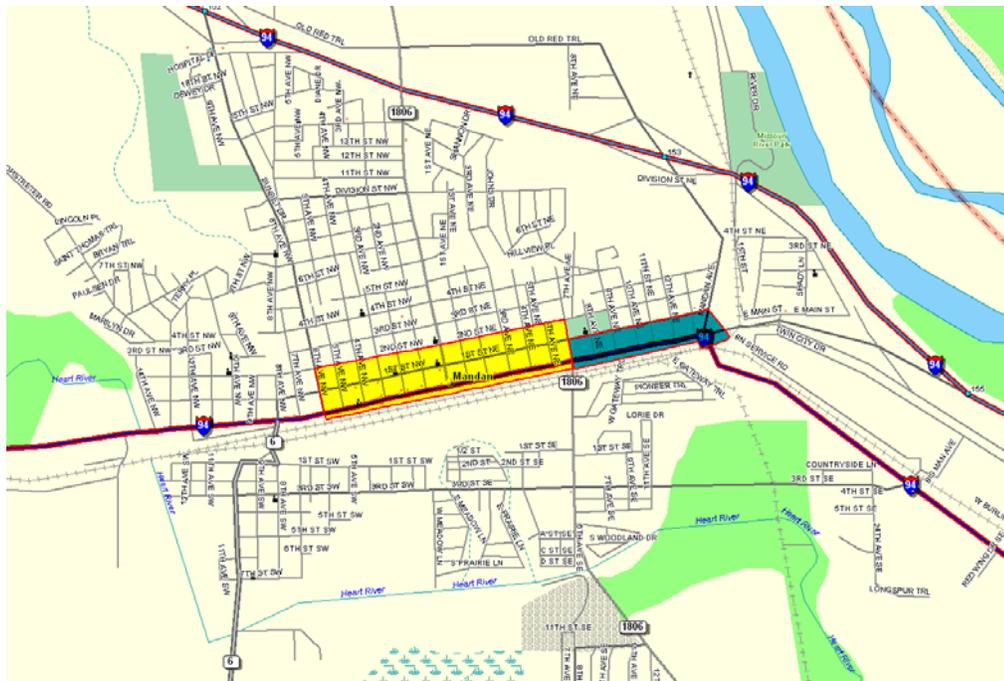
## Area Overview

The City of Mandan has a population close to 17,000 persons and is the county seat of Morton County. Located directly east of Mandan, across the Missouri River, is the City of Bismarck, North Dakota's capital city with a population of over 55,000 persons.

## Downtown Mandan

Downtown Mandan was once a healthy and thriving commercial center, but a number of factors have attributed to its decline since its heyday in the 1970's, which include:

- Reduction in rail operations and employment
- Development of large retail centers in neighboring Bismarck
- Discovery of environmental contamination in 1985 throughout downtown



Presently the downtown is characterized by a number of vacant, underutilized, and deteriorating buildings, with property values having declined significantly. Within the last few months a number of businesses closed on Main Street, including a local furniture and hardware store.

In spite of these business closures, vacancies, and a lack of investment in number of the buildings, downtown is the center of city and county government, as well as home to a

number of successful businesses. Those businesses that remain as a constant draw for the community include:

- *Mandan Drug*, an old-fashioned drug store and soda fountain
- The *Butcher Block*
- *Marv's Hardware Store*
- *Barlows Econofoods* grocery store
- The *Five Nation's Arts*, a Native American gift shop located in the renovated train depot on Main Street.
- Professional offices, such as law, architectural, medical, and financial institutions

Recent and planned developments within Downtown Mandan include:

- *Library Square Apartments*, a 46-unit affordable apartment building for the elderly is currently under construction on the corner of First Street and Collins Avenue
- The City's *Public Library* expansion and relocation to the southwest end of Main Street in the Downtown
- *For the Birds & More*, a new specialty store, opened this summer in the downtown, which offers a variety of goods relating to birds as well as antiques and works from North Dakota artists.

There are also a number of historic buildings that bring character to the Downtown. However, many require renovation to meet modern retail and office standards.

Main Street, Mandan's primary thoroughfare, has primarily been developed on the north side of the street, due to the Burlington Northern Santa Fe rail lines and property dominating the south side of Main Street. The railroad's dominance has limited the long-term development of downtown, by having created a long linear one-sided Main Street, which is not conducive to creating an active and cohesive downtown.

### *The Strip*

The project boundaries of the Strip Study Area, as illustrated on the following map, generally include the properties along Memorial Highway between the underpass on the west and the I-94 interchange on the east, in addition to 46<sup>th</sup> Street between Memorial Highway on the north and McKenzie Dr SE on the south. The "Strip" plays a key role in the City's economic growth in that it is the main connector between the City of Mandan and the City of Bismarck.



Over the years the Strip area has become an economic engine for the City of Mandan, attracting a number of new developments along Memorial Highway. The driving force behind most of this new investment is the Strip's close proximity to both the City of Mandan and the City of Bismarck. Such new developments include:

- A *Bobcat* Dealership
- *GM/Pontiac* Dealership expansion
- *Harley Davidson* Store
- *Kroll's Diner*
- *Windsor Square* (Strip Center)
- *Raging Rivers Waterpark*

The Strip has been developed on an ad hoc basis over the years with no cohesiveness or coordinated plan in terms of land uses and aesthetics. It is generally characterized by a mix of uses, which range from car and mobile home dealerships, farm implement retail, livestock, storage/warehouse space, light industrial, entertainment uses, and other general retail. The Strip area still has a number of large tracts of vacant land available for future growth.

### ***Site Analysis – Downtown Mandan***

URS analyzed the core of the Downtown according to the strengths, weaknesses, opportunities and threats for its redevelopment. The major points are highlighted below:

### *Strengths*

- Center for city and county governments. Governmental economic spin off is generated, such as creating the need for office space for local attorneys.
- The community supports revitalization efforts to help maintain the downtown as the city center.
- The infrastructure for the downtown is in excellent condition. Both 1st and Main Streets are new and of high quality.
- The new under/over passes increase downtown's accessibility to the greater Bismarck-Mandan community.
- A number of owner operators in the community show pride in their business and back it with investment.
- Consumers in Mandan have shown strong loyalty to businesses that are competitive and provide a quality service.
- The current environmental situation provides Mandan an opportunity to redevelop and revitalize its downtown in a coordinated and cohesive manner.
- The low property values and rents can help attract new businesses to the area.
- Recent building rehabs, such as *Kelsch Law Firm* and *Furniture First*, have improved the physical appearance of the Downtown.

### *Weaknesses*

- Mandan businesses do not enjoy a high level of consumer loyalty, especially for dry goods. If there is no product differentiation between Mandan and Bismarck, consumers tend to go for lowest price.
- Physically, many of the structures in the downtown are deteriorating. A factor in the deferred maintenance of the buildings downtown can be attributed to the lack of owner-operator operations.
- Contemporary retail operations, especially national brands require storefronts of at least fifty feet. Due in part to the historic nature of the buildings in Mandan, many of the storefronts are only 25 feet wide, requiring heavy investment in multiple properties to create modern retail spaces.
- Main Street is a difficult street to cross on foot due to truck and high-speed traffic. Frontage parking for Main Street businesses is therefore, limited because of people unwilling to park and cross the street.
- Many of the historic structures in the community area located within the environmentally questionable area, potentially damaging their ability to be redeveloped.
- Lack of cohesiveness and coordination among downtown businesses.
- The local economic development authority has the charge of creating jobs. While retail operations do create jobs, the community sees them as being a result of growth rather than an impetus. Consequently, there is not an organization which targets and recruits retail/service businesses into the community.
- In its current configuration, the downtown is a long linear one-sided Main Street and is larger than it needs to be for the size of the community.
- Downtown Mandan is lacking a large outdoor gathering place/public space.

### *Opportunities*

- The opportunity to receive funding for redevelopment because of the environmental situation allows Mandan to be creative and forward thinking in its redevelopment plans. Funding options for redevelopment may also include governmental brownfield programs such as HUD Section 108 loans.
- The land in downtown Mandan, especially in the environmentally questionable zone, remains relatively inexpensive. In addition, the city could have the means to acquire and assemble the property.
- Retail that is unique to what is found in larger retail developments in Bismarck, do well in Mandan, providing a niche retail market that Mandan could grow.
- The historic structures in the downtown provide the opportunity to promote tourism.
- Portions of Burlington Northern Santa Fe property along Main Street are currently underutilized. The opportunity exists for the creation of a two-sided Main Street through acquisition.
- Downtown Mandan feeds a good amount of traffic to the highway for those going south. This commuter traffic allows for the expansion of auto-related retail.

### *Threats*

- For as many opportunities that the environmental situation affords Mandan in redevelopment opportunities, it is also a threat, diminishing the ability of the private sector to develop new, quality uses.
- Many of the historic structures that can be capitalized for development are located on the questionable area and might be lost because of it.
- Bismarck is the center of the regional retail trade area. Retailers are more inclined to locate their operations in centers that allow for multiple destinations with fewer auto stops.
- There is an apparent apathy in the community toward local businesses. Local residents will shop local but only so long as the financial incentive is there. Ease and convenience do not play as large of a role.
- There is a lack of local capital being invested in downtown, only partially attributable to the environmental questions that linger.

### **Site Analysis – The Strip**

URS analyzed the Strip area according to the strengths, weaknesses, opportunities and threats for its redevelopment. The major points are highlighted below:

#### *Strengths*

- The Strip is a regionally known destination, enjoying natural name recognition that many retailers fight for. Current retailers promote their location by simply identifying they are on the Strip.
- Traffic counts through the Strip are healthy, with approximately 14,000 trips a day.
- Ample parking is available for businesses and their customers.
- The Strip is a regional destination point for consumers, especially with the addition of more car dealerships in the last year and a half.

- Businesses are in close proximity to both the City of Mandan and the City of Bismarck.
- Commercial values have been increasing over last 10 years, a sign of increased demand for property along the Strip.
- Unlike downtown, there are no overwhelming environmental questions.
- Destination amenities dot the Strip. A golf course, car track, and bowling alley all draw consumers to the area.
- The State has control of highway, allowing the City to save on its maintenance.

#### *Weaknesses*

- The *Kist Livestock Auction* operation, while a successful business, hampers development potentials close to it. This is typical of the incompatible nature of the Strip, mixing manufacturing, livestock, retail, entertainment uses without buffers.
- The Strip has been developed with a lack of cohesiveness. There are no aesthetic or landscaping features to help coordinate developments along the Strip.

#### *Opportunities*

- New upscale residential development is occurring at the southern end of the Strip in Mandan.
- The developer of the southern section of the Strip is actively pursuing national retail development.
- The property along the Strip is in large enough tracts to allow for the modern big box destination facilities that are currently lacking in the market.

#### *Threats*

- There is currently no cohesive plan for the future or even current development of the Strip.
- The State has control of the road, hampering aesthetic improvements that the City may wish to undertake.
- Memorial Bridge is deteriorating and is in need of repair or replacement. Undertaking such a roadway/bridge construction project may reduce the level of daily traffic flow onto the Strip.

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## ***DEMOGRAPHICS AND ECONOMICS***

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The market area for both the Downtown and the Strip Study Areas includes Mandan, Bismarck, Morton County, and Burleigh County, as illustrated in the map on the following page. To help better understand market conditions and potentials within the area, we analyzed demographic trends at the city, county, state, and national level.

Demographic characteristics of the population and traffic counts play an important role in the redevelopment of the Study Areas. Population, age, income, race, education, and traffic variables influence which retailers will consider the site, as well as indicating the potential buyer profile for residential units. Detailed tables illustrating these characteristics and trends are provided as appendix items. Highlights include the following:

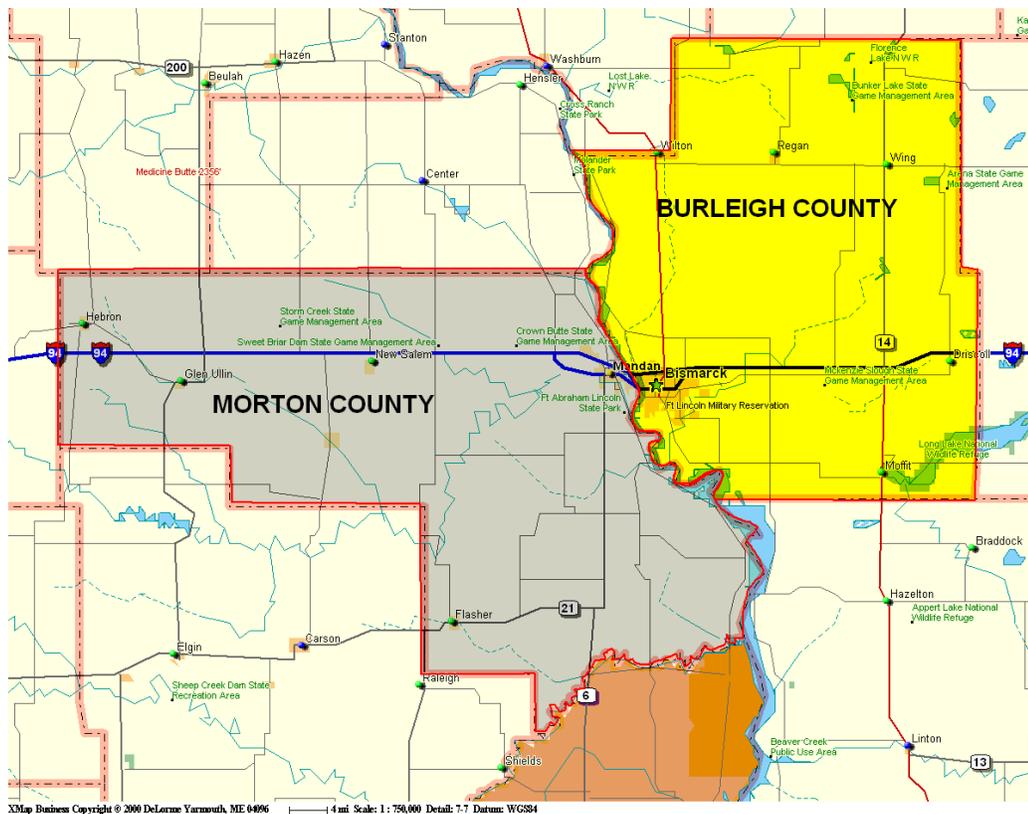
### ***Population***

The 2000 Mandan population of approximately 17,000 people is less than one third that of Bismarck's 55,000 population. Mandan has been growing at a slow rate of one percent a year on average since 1990, slightly lower than Bismarck's 1.16% average annual growth rate during this same period. Even though Mandan's growth was quite small between 1990 and 2000, it is impressive since Mandan was able to realize growth during a time when the State of North Dakota's population was stagnant. Between 1990 and 2000, the State of North Dakota's population grew by only 0.05% annually on average from 638,800 to 642,200.

- Both Morton and Burleigh Counties are losing people to other parts of the Midwest and country at a rate higher than they attract people from other North Dakota Counties. In 2000, Morton and Burleigh Counties enjoyed a net migration of 633 people from different North Dakota Counties but lost a net outflow of 732 people to other states, mostly those in the Midwest (409).
- Approximately 67% of the annual average growth between 1990 and 2000 experienced by Morton County occurred in Mandan. Mandan is the focal point for population growth west of the Missouri River in the Metropolitan Area.
- 66% of Morton County's population resides in Mandan.
- 20% of the North Dakota population lives in the Bismarck-Mandan Metro area.
- Between 1990 and 2000, the population of Mandan became more diverse, with its minority population growing from 2.2% to 5.17%. The largest growth was the American Indian population, which doubled from 251 to approximately 500 persons.
- The median age of the population in 2000 in Morton County is slightly higher than Burleigh County at 37.4 and 35.9 years old, respectively.

- The largest population sector in the City of Mandan are persons between the ages of 25 and 44 years, constituting approximately 31% of its population. This is significant in terms of residential development in that a large percentage of first-time and move-up home buyers fall within this group.
- Both the State of North Dakota and the Bismarck-Mandan metropolitan area have lost population in the 25 to 44 year old age cohort, having experienced an average annual decrease between 1990 and 2000 of 1% and 0.12% respectively. In contrast, the City of Mandan grew this age cohort by 0.19% annually on average during this time. However, the City of Mandan is losing population in the age cohort of persons under the age of 17 years, at an average annual rate of 0.39% since 1990.
- The largest population growth sectors in the City of Mandan are persons between the ages 45-64 years and those 65 years and older. These population sectors experienced an average annual growth of 3.49% and 2.04% between 1990 – 2000, respectively

### Morton and Burleigh Counties, North Dakota



## ***Income***

Income levels are important to help understand the affordability of homes in the area for local residents as well the potential commercial development that the population can support.

- The per capita income of an individual living in Morton County in 2000 was \$21,747. This is a 4.74% average annual increase since 1990.
- Morton County, when compared to Burleigh County, the Bismarck MSA, the State of North Dakota, the Midwest, and the nation, had the largest annual increase in its income on a percentage basis. However, individuals in the Morton County still earn less than those in most other areas.
- Morton County's per capita Income of \$21,747 is 81% that of Burleigh County's per capita income, 88% of North Dakota's state-wide per capita Income, 77% of the per capita income of those living in the Plains States and 74% of the per capita Income of the average United States resident.
- Less than one third of the households in Morton County earn over \$50,000 a year. Forty percent of Burleigh County's households earn more than \$50,000. In addition the median household income in Morton County is only 90% that of Burleigh's \$41,309.

## ***Education***

- The residents of Mandan are slightly below the state average for educational attainment. Over 10% of Mandan residents discontinued their education prior to graduating high school, compared to the State average of 8.7%.
- The State average for individuals holding a bachelor degree or higher is 22%. The percentage in Bismarck is 29.4% while Mandan lags behind at 19.1%.

## ***Employment Trends***

- 2000 employment is estimated at 49,291 workers in the metropolitan area.
- Regionally, the service employment sector dominates the workforce at 32% or 16,071 employees in 2000. Much of service employment includes health and business services.
- Evidenced by the retail coverage patterns documented later in the report, retail trade employment constitutes 20% (9,993) of the areas workers - the 2<sup>nd</sup> largest employment sector in the metro area.
- Similar to the metro area, the largest employment sector in Morton County in 2000 was the Service Sector with 2,175 employees (27%). The second largest

sector was Retail Trade with 1,671 employees (20%) followed by the Government Sector with 1,479 employees (18%).

- The industries that grew the most in Morton County between 1990-2000 in terms of number of employees include: Services (435 new employees), Retail Trade (235 new employees) and Manufacturing (218 new employees).
- The largest employment growth in Burleigh County between 1990-2000 occurred in the following industry sectors: Services (4,202 new employees), Retail Trade (1,630 new employees), and Government (1,433 new employees).
- Unemployment in Morton County from 1990 to 2001 averaged at 4.2%, a full 1% higher than Burleigh County and 0.65% higher than the State of North Dakota average.
- Wages in Morton County lag those of both the State and Burleigh County in most categories.
- The highest paying jobs in Morton County are found in the Transportation, Communication and Public Utilities Sector with an average annual wage of \$36,429. This annual wage is approximately \$2,000 over the State average, but is \$4,000 less than the same industry in Burleigh County.
- Retail trade jobs in Morton County are paid a higher average annual wage than those in Burleigh County and the State of North Dakota in general. The average annual retail wages in Morton County, Burleigh County and the State are \$16,385, \$14,616 and \$13,867 respectively. The wage in Morton County is not only higher but has been growing since 1990 at an average annual rate of 4.6% compared to Burleigh's 3.9% and the States 3.7% average annual change.

### ***Major Employers***

- The 30 largest employers in the Bismarck-Mandan community represent over 20,000 employees, approximately 40% of total employment.
- The following table shows the diverse break down of the top 30 employers, based on number of employees.

Top 30 Employers, by Number of Employees, Mandan and Bismarck, ND, 2002		
Rank	Company	Local Employment
1	State of North Dakota	4,309
2	MedCenter One Health Systems	2,350
3	St. Alexius Medical Center	1,900
4	Bismarck Public School District	1,506
5	ND Federal Offices	1,198
6	BOBCAT / Ingersoll-Rand	867
7	MDU Resources Group	715
8	Aetna	554
9	Mandan Public School District	497
10	Dan's Supermarkets	450
11	City of Bismarck	444
12	University of Mary	400
13	Basin Electric Power Cooperative	399
14	Wal Mart	380
15	Bismarck State College	370
16	Missouri Slope Lutheran Care Center	360
17	Burlington Northern Santa Fe Railroad	350
18	Cloverdale Foods	300
19	Laducer & Associates	284
20	Housing Industry Training (HIT)	275
21	Burleigh County	260
22	National Information Solutions Cooperative	255
23	United Tribes Technical College	250
24	Pride, Inc.	250
25	Mid-Dakota Clinic	247
26	Barlow's Econofoods	230
27	Missouri Valley YMCA	225
28	Baptist Home Long Term Care	225
29	Unisys Corporation	224
30	Tesoro Petroleum	218

Source: *Bismarck Mandan Development Association and URS Corp.*

- A majority of the large employers are located on the east side of the Missouri river in Bismarck.
- Major employers located in Mandan include (9) *Mandan Public School District*, (10) *Dan's Supermarket*, (17) *BNSF*, (18) *Cloverdale Foods*, (19) *Laducer*, (22) *NISC*, (26) *Barlow's Econofoods* and (30) *Tesoro Petroleum*.
- The largest regional employer is the State of North Dakota, with the majority of its employees located in Bismarck.

## ***Transportation and Traffic Trends***

Main Street and Memorial Highway are Mandan's main arterial roads, linking the City to Interstate 94 and the City of Bismarck. Interstate 94 is the major east-west route in North Dakota, providing easy access to the Bismarck-Mandan area, as well as steady through traffic. The rehabilitation/reconstruction of the Memorial Bridge, which is in need of a repair, could affect future traffic flow along Memorial Highway. The City of Mandan is currently evaluating the alternatives that have been proposed for this project, as well as seeking funding for the project.

According to the State of North Dakota's Department of Transportation, the following average daily traffic (ADTs) counts were recorded for Main Street and Memorial Highway within the Study Areas.

In 2001, 9,100 ADTs were recorded on the western end of Main Street at 6<sup>th</sup> Ave NW. The traffic counts nearly double on the east end of Main Street at 13<sup>th</sup> Ave NE, with 17,300 ADTs. The increase of traffic on the east end can largely be attributed to its accessibility to Interstate 94 and Grant Marsh Bridge. Since 1997, the traffic volume along Main Street has been decreasing by almost 3% annually on average.

Similar to the traffic along Main Street, Memorial Highway also experiences increased traffic flow on its east end near Memorial Bridge. In 2001 the following traffic counts were recorded along Memorial Highway:

- 5,200 ADTs at the underpass
- 11,300 ADTs at 32<sup>nd</sup> Ave NE
- 12,000 ADTs at 46<sup>th</sup> Ave SE

Since 1997 traffic has generally decreased along Memorial Highway at an average rate of 1%. Based on industry knowledge and conversations with major national retailers, it will be difficult to attract retailers with such traffic volumes alone, since national retailers typically seek sites in high trafficked areas with ADTs of at least 25,000.

However, the eastern portion of the Strip is aided by the visibility and proximity it enjoys from Highway 810 and Interstate 94. On Highway 810 between the Expressway Bridge and Memorial Bridge, 14,600 ADTs were recorded in 2001. Also in 2001, 20,600 ADTs were recorded on Interstate 94, just north of the Memorial Bridge. This helps raise the ADTs with visibility to the sites to over 25,000.

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## ***OFFICE/INSTITUTIONAL ANALYSIS***

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This section includes an analysis of the Downtown and the Strip Study Areas for office and institutional uses. To evaluate the potential, URS has completed several tasks, which include:

- Gathered background data on regional and local office markets that currently serve the target populations.
- Interviewed local office professionals with extensive knowledge of the Bismarck-Mandan Metropolitan office markets.
- Interviewed local businesses/institutions regarding future expansion potentials.
- Investigated leases of state government agencies that are coming up for renewal in the next few years.

### ***Bismarck-Mandan Office Environment***

The concentration of office space in the Bismarck-Mandan area generally includes the State Capital Grounds, Downtown Bismarck, and the growing area north of Interstate 94 in Bismarck. A large portion of Bismarck's office market can be accounted by State government departments and agencies, mostly located on the State Capital Grounds but also located on scattered sites throughout the City. The majority of the new office development is occurring on the north side of town, north of Interstate 94. Currently, a number of new office buildings are under construction in this area, two of which includes the Workers Compensation and Job Service buildings on East Century Avenue. This developing area is providing office tenants a business park environment with modern facilities and ample parking. In contrast, Downtown Bismarck is characterized by older buildings with limited parking for employees and visitors when compared to the area north of Interstate 94.

In regards to Mandan, there is very limited office space in the downtown area, mainly consisting of City/County governments and small professional offices, such as attorney, architects, accountants, and real estate offices. The buildings in Mandan are generally old and obsolete in layout, making it difficult to attract new tenants.

According to local real estate commercial brokers, the Bismarck-Mandan office market is currently soft. Tenants are generally finding that it makes more financial sense to own their own buildings rather than leasing office space due to low interest rates. Also, with the completion of the new Workers Compensation building, over 50,000 square feet of office space will be opening up within the next year.

### **Lease Rates**

Office lease rates in Bismarck are approximately between \$8.00 - \$12.00 per square foot (gross), with the older, obsolete buildings leasing between \$5.00-\$6.00 per square foot. Class A buildings can generally achieve gross rents up to \$14.00 per square foot. In Mandan, depending on the condition of the building, office lease rates typically range anywhere between \$3.00 - \$10.00 per square foot (gross). The lower end lease rates are commonly due to buildings being cosmetically and physically obsolete from a

lack of investment, as well as a lack of parking. Generally, a building with sufficient parking can command a higher rent of at least \$2.00 more per square foot than buildings without parking.

### ***Office/Institutional Potentials***

Through our interviews with local businesses and institutions, we identified the following office and institutional development/expansion opportunities within the Downtown and The Strip Study Areas. These development/expansion potentials are identified below:

- State government department and agencies
- Bismarck State College (office and classroom space)
- Local business expansion
- Native American businesses
- Creation of business incubator

### ***State Government Departments and Agencies***

#### ***Current Leased Space***

There are currently 27 different North Dakota State government departments and agencies currently leasing over 500 square feet of office space in the Bismarck-Mandan area, totaling approximately 206,000 square feet of leased space. A detailed table of each of the leases by state agency as provided by the State of North Dakota is included in the Appendix. Highlights from this table are the following:

- Of the 27 different state agencies leasing office space, six agencies recently signed future 2- year leases, expiring in June 2005, for space in the new Workers Compensation Building on 1600 East Century Avenue in Bismarck, totaling approximately 34,000 square feet. These agencies include:
  - Arts Council of North Dakota, 1,261 sf
  - Career Resource Network, 1,261 sf
  - Department of Commerce, 15,368 sf
  - Human Services, 9,251 sf
  - Parks and Recreation, 5,426 sf
  - Risk Management, 1,510 sf
- All of these leased locations are located in Bismarck, except for one 950 square foot office space located on 300 1st Street NW in Mandan, which is leased by DOCR (Field Service Division).
- Four state agencies lease over 60% of the current space, totaling over 125,000 sf, which include the following:
  - Human Services Department, three locations, a total of 63,795 square feet
  - Health Department, two locations, a total of 27,192 square feet
  - Attorney General, two locations, a total of 21,010 square feet
  - Department of Commerce, one location, a total of 13,665 square feet

- The majority of the 48 separate leases are 2-year leases at 71% and only six of the leases are for more than 2 years in duration.
- Thirty-eight of the 48 leases are expiring between June and September of 2003, with the remaining expiring in 2004 and 2005.
- The rents per square foot for the leased spaces are the following:
  - Median: \$10.76 psf
  - Average: \$10.58 psf
  - Minimum: \$3.77 psf
  - Maximum: \$13.00 psf
- The maximum rents of \$13.00 psf are for spaces in the new Workers Compensation Building on 1600 East Century Avenue in Bismarck.

### **Potential Office Developments**

The numerous North Dakota State agencies and departments, which currently lease space in Bismarck, are a good opportunity for the City of Mandan in terms potential office development. As indicated above, approximately 206,000 square feet is currently being leased by the various State agencies. Taking into consideration that over 26,000 square feet of current leased space will be relocated in the new Workers Compensation Building within the next six months, approximately 180,000 square feet will still be available for potential relocation. Taking in consideration that not all of the state departments will relocate to the City of Mandan but also factoring in growth potential for these agencies, we estimate that approximately 140,000 square feet of space could be developed. Assuming an average of 175 to 250 square feet per employee, this potential 140,000 square feet of leased office space could generate approximately 560 to 800 new employees for the City of Mandan. Such employment creation in Mandan, would help stimulate overall economic activity within the downtown and surrounding areas, increasing the demand for shopper/convenience goods, professional services, food and entertainment, and residential development.

City of Mandan could be a viable option for these agencies, especially if a Mandan location is cost competitive to office space in Bismarck. Most likely, economic incentives will need to be used to help attract the State agencies to Mandan and to make such a development project feasible. Also, amenities such as covered parking, building security, high speed internet accessibility, meeting room space, and assistance with relocation costs could help attract these agencies to Mandan.

To date, 12 of these agencies which are currently leasing space have been contacted to help measure their interest in potential relocation to Mandan. Of these 12 agencies, eight of them expressed interest if the new location would offer competitive lease rates and select amenities as identified above. Two of the agencies contacted, the Attorney General's Office and the Insurance Office, had no response, while the Protection and Advocacy Office and the Public Employees Retirement System indicated no interest since their space is currently adequate. Listed below are the 12 agencies that did express interest, as well as the amount of space each agency is currently leasing:

- Auditor's Office, 768 square feet

- Electrical Board, 1,728 square feet
- Housing Finance, 12,700 square feet
- Board of Nursing, 2,406 square feet
- Office of Administrative Hearings, 1,136 square feet
- Plumbing Board, 530 square feet
- Department of Health, 20,560 square feet
- Human Services, 58,000 square feet

***Department of Health***

**Current Space**

The North Dakota Department of Health is a strong candidate for relocation in Mandan. According to its *Master Facilities Plan*, prepared in June 2000, the Department is currently housed in six facilities, located on separate sites in the City of Bismarck. The facilities consist of approximately 91,800 square feet of building area, including 27,192 square feet of leased space. The *Master Facility Plan* identified the need for an additional 61,000 square feet, bringing total space needs to approximately 153,000 square feet. Laboratory and Morgue functions represent approximately 46% of the total space need. Office administrative and support functions represent 54% of the space need.

The locations as stated in the *Master Facility Plan* include:

Judicial Wing, State Capitol Grounds, 600 East Boulevard Avenue, 33,658 sf (Gross Floor Area)

- State Health Officer
- Administrative Services
- Health Resources
- Preventive Health

Missouri Office Building, 1200 Missouri Avenue, 22,508 sf (Gross Floor Area)

- Environmental Health Section

White House Office Building, 1220 Missouri Avenue, 2,122 sf (Gross Floor Area)

- Municipal Facilities

Training Center, 2639 East Main, 5,944 sf (Gross Floor Area)

- Municipal Facilities
- Shared Training
- Morgue

Microbiology Laboratory Building, 1205 Avenue A West, 6,720 (Gross Floor Area)

- Microbiology Lab

East Laboratories Building, 2635 East Main, 20,851 (Gross Floor Area)

- Chemistry lab
- Forensics Examiner
- Toxicology Lab
- Crime Lab

The *Master Facility Plan* noted that other than the offices housed in the Judicial Wing on the Capital grounds, the facilities are all undersized and or have serious deficiencies related to laboratory use. And all administrative divisions are in need of adequate file and long-term record storage.

### **Anticipated Space Needs**

The plan identified numerous development options to address the department's increased space needs, which ranged from expanding existing sites, building a new complex to house all the department's functions, to building a new complex to house select department functions. Logistically, the preferred option is to have all department functions within one facility to increase efficiencies. However, this option may not be feasible due to cost and land constraints.

Based on the above information and conversations with key personnel from the North Dakota Department of Health, the Health Department is a strong candidate for potential relocation in Mandan. The Strip, with ample vacant land available, could be an ideal location for the development of a new complex for the entire Health Department or for select functions within the department. However, if it is determined that one location for the Department of Health is not feasible financially and/or logistically, a downtown location would also be viable for select functions of the Department of Health, such as the Environmental Health Section. The Environmental Health Section is currently located at 1200 Missouri Avenue and indicated that they are in need of additional space and would consider relocating to Downtown Mandan, needing approximately 40,000 square feet.

### **Recommended Location - The Strip**

In regards to the development of a State Office Campus, the Strip is recommended over the downtown for numerous reasons.

- **Land Availability.** First, there are large tracts of available vacant land on the Strip to accommodate new office development and potential future expansion, such as a new Department of Health facility as identified earlier in the report. Such large development sites are currently not available in the downtown.
- **Accessibility.** A Strip location will most likely be an easier "sell" to the various State agencies over a downtown location due to the Strip's close proximity to Bismarck. A Strip location, especially on the east end of the Strip, would help minimize the commute time for employees and minimize the distance to the Capital grounds.
- **New Construction.** A new and modern facility will help attract and influence State agencies to relocate from their current Bismarck locations to Mandan. A downtown location would most likely involve building rehabilitation, which may not be as attractive and luring to the State agencies as new construction.
- **Laboratory Compatible.** The Strip area is ideal for laboratory space because of the semi-industrial character of such spaces, which is often more suitable for an office-flex environment than a pure office environment.

It is not typical for State agencies to have funding for major capital projects, such as new building construction. Recognizing this constraint, as well as Mandan being perceived as an inferior office location to Bismarck, public assistance is a must to provide the gap financing necessary to build a facility of equal or better quality with

lower lease rates than the building inventory located in Bismarck. Only with a better product at a lower cost for the tenant will Mandan be able to successfully attract and relocate State agencies from Bismarck.

### ***Bismarck State College***

Bismarck State College (BSC) is a two-year community college located on the west side of Bismarck, just south of Interstate 94 on Schaefer Street. The college is an extremely important and integral part of the greater community in that it provides a multitude of resources and services to a wide range of persons and interest groups. At BSC one can:

- Earn college credits for transfer to a four-year college
- Complete training in a vocational/technical program
- Take classes towards associate, bachelor, and masters degrees
- Take non-credit courses of special/personal interest
- Attain workforce training
- Participate in on-line education programs

### **Space Needs**

Currently, BSC is at full capacity in regards to administrative and classroom space on its campus. Currently, BSC is leasing approximately 7,500 square feet of office space off campus in Bismarck for marketing and fundraising functions. BSC has adequate available land on its current campus to build new facilities; however, they have not been able to receive the necessary funding from the State for brick and mortar projects. In response to its space constraints and the lack of State funding, the college recently implemented a fundraising campaign for a 70,000 square foot addition on campus, which they expect to be built within the next three to five years. However, even with this anticipated expansion, the College indicated that it would still have demand for an additional 70,000 square feet.

BSC indicated that a number of years ago, it had considered purchasing the Heartview building, a former rehabilitation center on the west end of Mandan, to accommodate a number of its vocational/technical training programs. However, at the time, BSC did not have the necessary funding, nor did the facility have adequate parking for the intended uses of the facility.

BSC expressed interest in developing satellite locations in Mandan to help alleviate its current space constraints, if sufficiently incentivized. Such locations would most likely be used for self-contained programs, such as vocational programs, that do not need to be located on campus for logistic and efficiency purposes. The school has had success in the past with such arrangements. For instance, BSC's Line Workers Program is currently located in Mandan near the Seven Seas Hotel. The college rents space from the Rural Electric Co-op for this program, which currently has about 400 enrolled students.

BSC also indicated that it could be interested in locating overflow office space in Mandan, if competitively priced.

### **Recommended Location – The Downtown**

There are a number of vacant and underutilized buildings in the downtown area, which could be utilized by BSC for various vocational/technical programs, as well as for office

space use. A downtown location for BSC would be appropriate since close proximity to Bismarck is not critical to its operations as compared to the various State agencies. Due to the services and programs it offers, BSC becomes a destination wherever it is located, drawing its users to its facilities. However, it is important for BSC to have the appropriate type of space to accommodate specific programs. Types of space could range from traditional classroom space, to large open flex-type space to accommodate its various vocational/technical programs. Based on estimated space needs of 70,000 square feet of office and classroom space, a downtown location could generate approximately 25 – 30 new employees and 200 – 300 students to the downtown

#### ***Local Business Expansion***

Another potential resource that should be utilized to help expand the office employment sector within the two Study Areas are the existing businesses within the community looking to expand. It is extremely important for the City to be in communication with local businesses, so that the City can assist businesses with their expansion plans and business needs. Establishing such dialogue with existing businesses can help maintain and grow employment within Mandan. Such an opportunity is highlighted below.

#### **Laducer & Associates, Inc.**

Laducer & Associates, Inc. is a SBA 8(a) certified, American Indian owned and operated business located at 201 Missouri Drive, Mandan, ND. The company is one of the fastest growing companies in the area, having grown from one employee in 1986 to 250 full-time employees in 2002. Laducer & Associates specializes in information management services, with key clients being the Internal Revenue Service, Uniband Inc., and Blue Cross/Blue Shield of North Dakota.

Approximately 65% of the company's 250 employees perform data entry. The remaining 35% are employed at a higher skill level, requiring research and analysis skills. Twenty-eight percent of the employees are Native Americans.

#### ***Space Needs***

Presently, Laducer & Associates occupies an approximate 22,000 square foot facility, which is at full capacity. There is no room for expansion at its present site. Laducer & Associates indicated that it might be in need of additional space if it is awarded a new contract, which is currently under consideration. If the company is awarded the contract, it will need an additional 10,000 – 20,000 square feet of space, potentially increasing its employment by a couple hundred persons.

Laducer & Associates communicated that they would prefer to expand within Mandan for efficiency reasons but that it will also consider other locations if it is advantageous financially and operationally.

#### **Missouri Valley YMCA**

The Missouri Valley YMCA has been a major community resource for over 30 years. Currently it has approximately 10,000 members, consisting of 4,200 household units. Within the past few years there has been an increase in memberships among families, youth, and college students with a decrease in single-adult memberships.

The YMCA is currently located in Bismarck. However, over the years the YMCA has discussed the potential of expanding its facility and service area, but no definite plans have been made to date. In January the YMCA will be meeting with its board of directors to discuss the its three-year plan. One of the agenda items during this meeting is to better define its service area.

The YMCA indicated that it is interested in the Mandan service area, since currently only a small portion of its members are from Mandan and would be interested in exploring the idea of locating a branch facility in Mandan. Aware of the services the Mandan Community Center already offers, the YMCA communicated that if it does expand into Mandan, it would be careful so as not to duplicate any existing services already offered to the community. Before any expansion decisions are made, the YMCA's national team would need to complete a feasibility study to determine if Mandan could support a YMCA facility.

If such a facility is determined feasible in Mandan, both the downtown and the Strip areas would serve as a good location for the YMCA and its programs.

#### ***Recommended Location***

The recommended location for businesses looking to expand strongly depends of the particular needs of each of the businesses. General office is recommended to be located in the downtown area to help bring employment and activity to the area. Many of the existing underutilized buildings could be renovated to fit the needs of today's office users, such as: efficient office design layout, internet accessibility, and energy efficient buildings.

For businesses seeking office/flex-space, this type of space is recommended for the Strip, particularly on the west end of Memorial Highway. This area of the Strip is currently industrial/warehouse in character and such similar uses should be encouraged to continue. There is available vacant land on the west end of Memorial Highway which could be targeted for flex-space users, such as construction related businesses, warehousing, and distribution.

#### ***Native American Businesses***

The Native American community is another resource in which the City of Mandan can tap to encourage business development in the Downtown and the Strip Study Areas. Mandan is a logical location for Native American business development, since it is in close proximity to the United Tribes Technical College (UTTC) in Bismarck, which is committed to the economic, social, and cultural advancement of Native Americans.

#### **United Tribes Technical College**

UTTC serves the needs of over 40 tribal nations throughout the United States and Canada, providing the Native American community comprehensive education and training programs, business development services, and social services. The College offers 14 Associate of Applied Science Degree programs and nine Certificate programs, which include the following:

Associate of Applied Science Degree Programs:

- Art/Art Marketing
- Automotive Service Technology

- Computer Support Technology
- Criminal Justice
- Early Childhood Education
- Nutrition and Foodservice
- Health Information Technology
- Injury Prevention
- Office Technology
- Practical Nursing
- Small Business Management
- Tribal Management

Certificate Programs:

- Administrative Office Support
- Art/Art Marketing
- Automotive Service Technician
- Computer Support Technician
- Construction Technician
- Criminal Justice
- Tribal Management

***North Dakota South Dakota Native American Business Center***

Located on UTTC's campus is the North Dakota South Dakota Native American Business Center, whose mission is to assist in the development of Native American businesses. The majority of its current clients are located on Indian reservations with a small number of them located in the Mandan-Bismarck area.

The Center believes there could be a number of businesses and entrepreneurs interested in locating to Mandan, if offered the appropriate level of incentives. In the past, the Center has been approached by Native American professionals, such as architects and engineers, who were looking to start their own businesses. However, these business start-ups were never realized due to high business start-up costs. The Center expressed interest in working with the City of Mandan to help create a program that would encourage Native American business development within Mandan.

***Recommended Location***

The recommended location for Native American businesses also strongly depends of the particular needs of each of the businesses. As explained in the previous section, general office is recommended to be located in the downtown area to help bring employment and activity to the area. Many of the existing underutilized buildings could be renovated to fit the needs of today's office users, such as: efficient office design layout, internet accessibility, and energy efficient buildings.

For businesses seeking office/flex-space, this type of space is recommended for the Strip, particularly on the west end of Memorial Highway. This area of the Strip is currently industrial/warehouse in character and such similar uses should be encouraged to continue. There is available vacant land on the west end of Memorial Highway which could be targeted for flex-space users, such as construction related businesses, warehousing, and distribution.

***Business Incubator***

To help foster business development, the City of Mandan should explore the concept of creating a business incubator for start-up businesses. A business incubator would help new businesses manage business operations costs by providing the following potential services/assistance:

- Discounted rental rates
- Shared services and amenities such as conference rooms, copiers, lunchroom, janitorial services, and clerical assistance.

Depending on the specific needs of the businesses, an incubator could be implemented in a number of ways. The traditional incubator is where all of the business start-ups are located in one facility and share services, resources, and equipment as identified above. However, if the business start-ups have special space and/or location requirements that do not configure to the "traditional" incubator facility, the City could design a program to offer discounted rents for a specified amount of time at other locations which best meet a businesses' special needs.

#### **Recommended Location**

If a traditional, "all in one" incubator facility is created, it recommended that it be located in the downtown area. The incubator would help bring employment into the downtown, creating a more active business center. Having become familiar and established in the downtown area while being located in the incubator facility, these companies will most likely want to remain in the downtown when moving into their own space, once they are no longer in need of the incubator services. Over time, the incubator will help build the business population as its users grow and expand.

#### ***Office Market Conclusions***

It is extremely important for the City of Mandan to retain and attract existing and new businesses to help strengthen and diversify the City's economic base. By building employment within the Study Areas, overall economic activity will be stimulated, increasing the demand for shopper/convenience goods, professional services, food and entertainment, as well as residential development. Therefore it is critical for the City to encourage and secure office development within the Study Areas to help jump-start these other areas of economic development.

It is recommended that the City encourage building ownership among the businesses in the Downtown. Currently, many of the downtown businesses lease space from absentee landlords in buildings that suffer from deferred maintenance. Building ownership among the tenants will help encourage continued investment and maintenance in the area, improving the physical appearance and character of the Downtown.

Due to Mandan being perceived as an inferior office location to Bismarck, public assistance is a must to provide the gap financing necessary to provide space of equal or better quality with lower lease rates than the building inventory located in Bismarck. Only with a better product at a lower cost for the tenant will Mandan be able to successfully attract potential businesses.

Recommended local economic development tools that the City could use to help attract businesses and institutions in the area include:

- Land and building acquisitions
- Land write-downs
- Building write-downs
- Property tax abatements
- Tax increment financing
- Renaissance Zones

These tools, as well as State and Federal funding tools, are discussed in more detail in the Economic Development Tools Section of this report.

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## ***RESIDENTIAL MARKET ANALYSIS***

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URS investigated options for both rental and for-sale residential development in the Downtown and along the Strip. In both instances, research of current development trends within the Bismarck-Mandan Metropolitan Residential Market were investigated. When available, brokers and developers of competitive projects were interviewed to ascertain future development plans. Detailed tables of the following analysis are provided in Appendix A.7.

### ***Housing Characteristics***

According to the 2000 U.S. Census, Mandan has a total of 6,634 occupied housing units, constituting 67% of Morton County's occupied housing stock. Since 1990, Mandan experienced a 1.7% average annual increase in housing units, a total of 1,026 new units. This increase constitutes approximately 85% of Morton County's growth in occupied housing units during this time.

The average household size in Mandan is 2.5 persons, which is comparable to household sizes in Bismarck, Morton and Burleigh Counties, and the State of North Dakota.

When comparing Mandan's residential market to Bismarck's market, it is apparent that Bismarck is a much larger market with almost 3.5 times more housing stock than Mandan at 23,143 occupied housing units. However, between 1990 and 2000, both cities have increased in occupied housing units by about the same rate, relative to its population size. As stated previously, Mandan experienced an average annual percent increase in occupied housing units of 1.7% between 1990-2000, as compared to 1.8% increase in Bismarck. Detailed tables of the housing characteristics for the City of Mandan, the City of Bismarck, Morton County, Burleigh County, and the State of North Dakota are located in the appendix of this report.

### ***Rental Occupied Housing Units***

In 2000, 30% of Mandan's total occupied housing units are rental units. This is a lower percent of renter occupied units as compared to the City of Bismarck and Burleigh County at 37% and 32% in 2000, respectively. Between 1990 and 2000, the cities of Mandan and Bismarck, Morton and Burleigh Counties, and the State of North Dakota have all realized a slight decline in renter occupied units as a percent of total occupied housing units of between 1-3%.

### ***Owner Occupied Housing Units***

The majority of Mandan's owner occupied housing is single-family detached units at 73% in 2000 with an average annual percent increase of 2.3% between 1990 and 2000, or an increase from 2,725 units to 3,423 units. The supply of attached and multi-family owner occupied units in Mandan has been increasing slightly between 1990 and 2000 but is still very limited, accounting for only 6.1% of Mandan's owner occupied housing stock in 2000 as compared to 5.4% in 1990. Nine percent of Mandan's growth

in owner occupied housing units between 1990 and 2000 was attached and multi-family units.

Similar to Mandan, the majority of Bismarck's owner occupied housing is single-family detached units at 70% in 2000. However, even though Bismarck experienced an increase in owner occupied single-family detached units between 1990 and 2000, increasing from 8,597 to 10,263 units, owner occupied single-family detached units have decreased as a percent of the total owner occupied housing stock from 73% to 70%. This decline can be partially attributed to the 696 attached and multi-family owner occupied units that were added during this time, accounting for 24% of the total increase in owner occupied housing units. In 2000, attached and multi-family owner occupied units constitute 15% of Bismarck's owner occupied housing stock as compared to 12% in 1990.

### ***Residential Building Activity***

The City of Mandan's Building Department has recorded residential building permit data for the past 10 years. In summary, the City issued the following number of permits for single-family dwellings, two-family dwellings, condominiums, townhomes, apartment units, new mobile homes – rented and owned lots from 1993 through November 2002:

- 678 permits for single-family dwellings, equal to an annual average of 68 new units
- Zero permits for two-family dwellings
- 54 permits for condominiums, equal to an annual average of 5 units
- 42 permits for townhomes, equal to an annual average of 4 units
- 240 permits for apartments, equal to an annual average of 24 units
- 84 permits for new mobile homes, equal to an annual average of 8 units

Residential Building Permit Data for New Construction by Total Units by Category, City of Mandan, ND, 1993 - 2002												
Category	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002 <sup>1</sup>	Total	Annual Average
Single Family Dwellings	65	104	72	71	53	59	60	62	59	73	678	68
Two Family dwellings	0	0	0	0	0	0	0	0	0	0	0	0
Condominiums	0	0	0	10	0	0	20	4	8	12	54	5
Townhouse	0	7	6	6	0	13	0	8	0	2	42	4
Apartment Units	12	4	4	20	28	40	28	0	12	92	240	24
Mobile Homes - Rented Lots	0	0	1	0	0	0	0	0	0	0	1	0
Mobile Homes - Owned Lots	18	7	13	9	5	7	10	6	3	6	84	8
<b>Total</b>	<b>95</b>	<b>122</b>	<b>96</b>	<b>116</b>	<b>86</b>	<b>119</b>	<b>118</b>	<b>80</b>	<b>82</b>	<b>185</b>	<b>1,099</b>	<b>110</b>

Note: <sup>1</sup> 2002 data as of November 2002

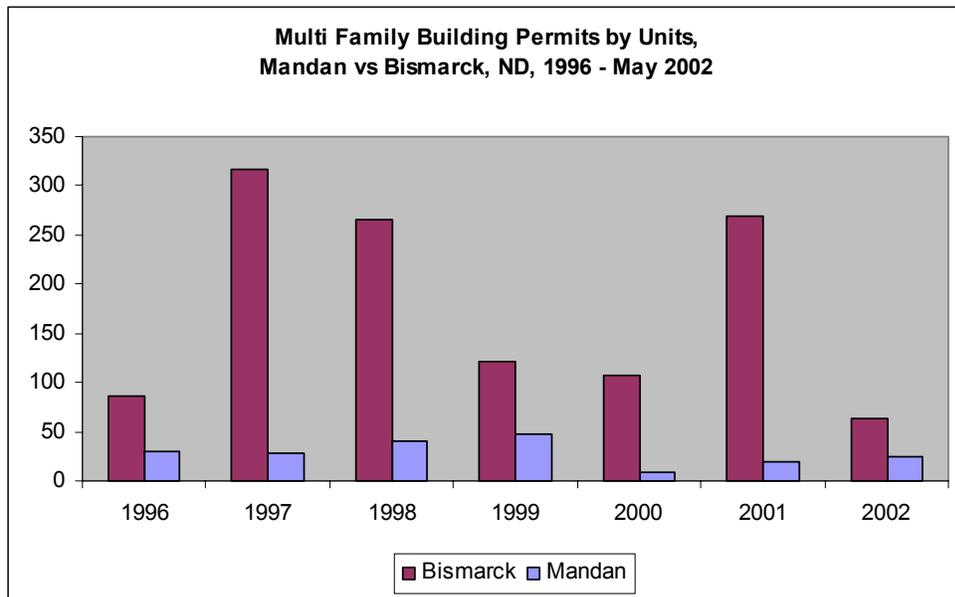
Source: City of Mandan, Building Department and URS Corp.

As indicated in the above table, the number of permits issued annually for single-family dwellings have remained relatively constant over the past 10 years. However, permits for condominiums, townhomes, and apartments appear to be sporadic over the years. Townhome/condominium development accounts for a very small portion of total new residential construction, however, it does appear these unit types have been gaining market acceptance in the last five years.

The table above highlights the recent influx of apartment development activity in Mandan within the last year. In 2002 building permits were issued for 92 new apartment units, including the 46-unit Library Square development. This is a significant increase when compared to past years' activity. Between 1993 and 2002, the average annual number of apartment units that were issued a building permit is 24 units. Excluding 2002, Year 1998 had the highest number of apartment units at 40 units, while Year 2000 had the lowest with no units.

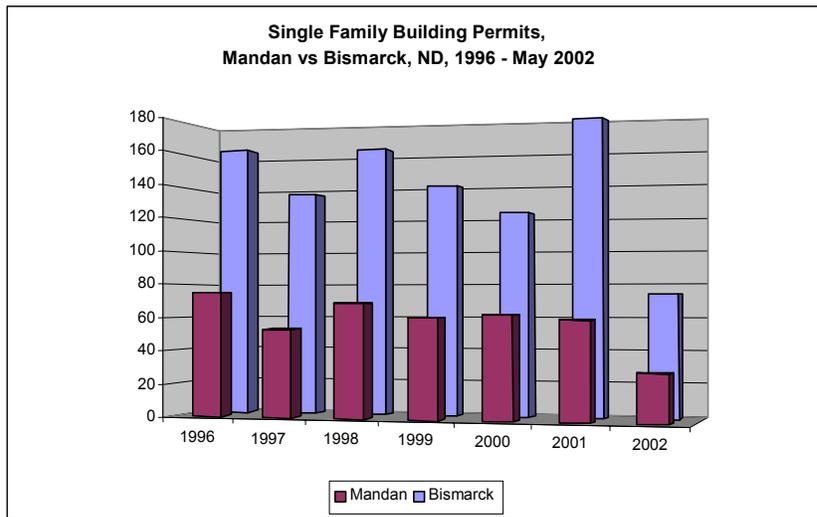
***Mandan vs. Bismarck***

The charts below highlight the Building Permit activity in Mandan as compared to the City of Bismarck.



**Multi Family Permits by Units**

- Mandan, though averaging fewer units annually is less cyclical than Bismarck.
- Mandan averaged approximately 29 units annually through 2001 but is raising that with new activity in 2002.



### Single Family Permits

- From 1996 to 2001, Mandan averaged 63 building permits a year, compared to Bismarck's 151.
- Mandan accounted for approximately 30% of the average annual growth in single-family homes for the Bismarck-Mandan community. This is significant because Mandan accounts for only 23% of the areas population, inferring that new growth in the community is occurring in Mandan.
- Permits in Mandan have remained relatively consistent, especially compared to Bismarck's fluctuation.

### ***Residential Sale Trends***

Residential sales data for 2002, 2001, and 2000 were analyzed for the City of Mandan and the City of Bismarck. For comparison purposes, it is important to see how Mandan measures against the neighboring market, Bismarck, in terms of number of units on the market and sold, sales price, unit types, sales price as a percent of listing price, and average days on market. The residential sales data is from the Multiple Listing Service (MLS) and does not include all sales but only those that were sold by realtors through the MLS. The table on the following page details this information.

Residential Sales by Structure Type, Mandan and Bismarck, ND, 2000 through September 2002						
	2000		2001		2002 <sup>1</sup>	
	Mandan	Bismarck	Mandan	Bismarck	Mandan	Bismarck
<b>Single-Family Residential</b>						
Number on Market	148	486	335	939	239	752
Number Sold	101	345	176	504	128	369
Average Sales Price (SP)	\$78,467	\$111,710	\$95,887	\$115,355	\$88,905	\$114,447
SP as % of List Price	98%	98%	97%	97%	97%	97%
Average Days on Market	43	43	75	65	55	63
<b>Condo/Townhome</b>						
Number on Market	29	176	38	307	55	226
Number Sold	15	120	16	171	11	121
Average Sales Price (SP)	\$97,553	\$82,603	\$93,194	\$88,908	\$91,341	\$89,239
Median Sales Price	na	na	\$72,250	\$84,500	\$72,700	\$85,000
SP as % of List Price	98%	98%	97%	98%	97%	98%
Average Days on Market	138	80	204	91	41	69
<b>Duplex</b>						
Number on Market	na	10	7	48	11	49
Number Sold	na	1	4	19	7	24
Average Sales Price (SP)	na	\$109,900	\$54,850	\$83,405	\$72,353	\$77,578
SP as % of List Price	na	100%	95%	97%	98%	97%
Average Days on Market	na	45	62	99	85	68
<b>Multi-Family</b>						
Number on Market	7	48	14	39	9	24
Number Sold	3	27	7	15	7	11
Average Sales Price (SP)	\$79,967	\$102,213	\$112,757	\$106,790	\$154,857	\$123,718
SP as % of List Price	96%	96%	89%	95%	93%	96%
Average Days on Market	69	66	119	110	53	115

Note: <sup>1</sup> Data is as of September 2002

Source: Multiple Listing Service, Century 21, Landmark Realty, Inc., and URS

As illustrated in the above table, it is clear that Bismarck has a much larger residential market with over three times as many homes on the market and sold as compared to Mandan. In terms of single-family dwellings, Bismarck has been able to command on average sales prices \$20,000 to \$25,000 higher than Mandan at average sales prices of approximately \$114,000 to \$115,000 in 2002 and 2001. Over the last three years, single-family dwellings in both Mandan and Bismarck have been selling for approximately 97% of the listing price, which is an indication of a strong housing market.

The price variance of condominiums/townhomes in Mandan and Bismarck is slightly smaller than the single-family dwellings price variance between the two cities. For the past two years, Mandan's median sales price for condominiums/townhomes has been approximately \$11,000 lower than units located in Bismarck. The ages of the condo/townhome units sold in both Mandan and Bismarck vary widely with the majority

having been built in the 1970's, 1980's, and early 1990's. In regards to the newer units, approximately 27% of the condos/townhome units sold in 2002 were built within the past two years as compared to 18% in Bismarck. Townhomes and condominium units, represents just over 17 % (55units) of the total residential units on the market in Mandan in 2002 as compared to approximately 22% (226 units) of the total residential units on the market in Bismarck. A number of the real estate brokers and developers interviewed for this project indicated that the prices for condominiums in Mandan and Bismarck are generally about equal but the market reception and demand is much stronger in Bismarck.

### ***Survey of Competitive Condominium Developments***

To assess the future demand of residential development potentials for the two Study Area's, URS surveyed competitive condominium developments within Mandan that have recently been completed or are currently under construction. This survey is a good indicator as to which housing types and price points are in demand in the Mandan area, as well as the potential buyer profile.

A total of six residential developments were surveyed, four of which have been completed within the last five years and include: ***3021 Marina Road South, Burlington Condos, Collin's Court, and Pirate's Cove***. The remaining two developments consist of four 4-unit buildings in the ***Lakewood Harbor Development*** currently under construction and in marketing.

Condominium development within recent years has been quite limited in Mandan. Interviews with local developers indicate that there is limited demand for multi-family development, where a developer on average sells 10 single-family homes to one condominium that is built. Condominium development projects in Mandan are generally small in scale, averaging about nine units per project, and scattered throughout the city. Interestingly, these developments have varied greatly in terms of success, absorption rate and price points. The developments surveyed are highlighted below.

***Lakewood Harbor Multi-Family.*** There are four four-unit, two-story condominium buildings being built in the predominately single-family development of Lakewood Harbor Development on McKenzie Drive and Bay Shore Bend SE. Two of the buildings are being built by developer Lee Mitzel and the remaining two are being developed by Mike Cook of Cook Construction. Both of the developers have completed their first four-unit building, while their second buildings are still under construction. The 2-bedroom one-level units are approximately 1,500 square feet and have an average selling price of \$117,000 - \$120,000. Of the eight units completed in this area, half have sold to date. Both developments were speculative and none of the units were pre-sold. Based on the units sold, the buyer profile includes both empty nesters and young couples. All of the units include a 2-car garage and an elevator. The developers indicated that the elevator is an important selling feature to retired buyers due to accessibility concerns.

***3021 Marina Road South East.*** Developer Mike Wachter recently completed two four-unit, two-story condominium buildings in May 2002 on Marina Road South East. All eight two-bedroom units have been sold with an average absorption of one unit per

month. The units in the first building were 1,400 square feet and sold between \$100,000 to \$118,000. The units in the second building were slightly larger at 1,900 square feet and sold between \$122,000 to \$137,000. The buyer profile is couples over 50 years in age and widowers. Five of the eight buyers are from Bismarck.

**Burlington Condos.** The Burlington Condos, located on 131 3<sup>rd</sup> Avenue SE south of the Burlington Railroad tracks, were built in 2000 by developer, Al Leingang. The project consists of a single three-story building with 20 one-level units. To date, nine of units have been sold, all of which face away from the railroad tracks and yard, with two pending sales. Currently, four of the condo owners are renting out their units. The building was speculative with no pre-sold units. All of the units are 2-bedrooms with 1 ¾ bathrooms. Two of the units are 1,200 square feet, which were the first to sell, and the remaining 18 units are 1,056 square feet. The average selling price for these units is \$106,000, or \$100 per square foot. The buyer profile of these units are empty nesters. Amenities in the building include an elevator, workout room, and 2-car garages on the first floor.

**Collin's Court.** Five two-story condominiums were built in 1998 on 600 Collin's Court, all of which were pre-sold before construction. The units are 3,000 square feet with 4 bedrooms and 3.5 bathrooms. Currently the units are on market for between \$172,000 - \$192,000. The development is located just north of the downtown area and sits on top of a steep incline, creating privacy and great views of the City for the development. The buyer profile of these units are persons 55 years and older and typically retired.

**Pirate's Cove.** This development is an upscale three-story condominium development located on riverfront property south of the Memorial Bridge, which was developed by Mike Cook of Cook Construction in 1997/1998. There are a total of ten 3-bedroom/2-bathroom units, with sizes ranging between 2,200-2,800 square feet. The units have sold between \$200,000 - \$250,000. The building was built on speculation and no units were pre-sold. Five units sold within the first year, three units in the second year after completion and the last two units were sold between 2000 and 2002. Amenities of the building include underground parking and an elevator. The buyer profile includes widowers and business professionals.

A table and map showing the surveyed residential projects are on the following pages.

**Competitive Condominium Developments, Mandan, ND**

Name and Location/ Developer	Year Built	# of Units Planned	# Sold	Unit Type (Duplex, Townhome, Condo)	# of Bedrm/ Bath	Unit Size (S.F.)	Price Range	Price/sf	Buyer Profile	Amenities	Comments
Lakewood Harbor McKenzie Drive & Bayshore Bend SE <i>Lee Mitzel/Lakewood Harbor Development Co.</i>	Spring 2002 - present	8	3	Condo, 4-unit building/ Ranch	2/1	1,480	\$117K	\$79	empty nesters and young couples	Elevator, 2-car garage	Limited demand for condos. Sells 10 single family homes to one condo.
Lakewood Harbor Development 2900 Bay Shore Bend, 4607 McKinzie Dr. <i>Cook Construction</i>	2001 - present	8	1	Condo, 4-unit building/ Ranch	na	na	\$120K	na	na	2-car garage, elevator	One building completed, one under construction.
3021 Marina Road South East <i>Mike Wachter</i>	2001 - May 2002	8	8	Condo, 4-unit building/ Ranch	2	1,400 - 1,900 sf	First bldg: \$100K - \$73 - \$86 \$118K Second bldg: \$122K - \$137K		50+ year old couples and widowers. 5 of the 8 buyers are from Bismarck.	na	General absorption: 1 unit per month.
Burlington Condos 131 3rd Ave. SE <i>Al Leingang</i>	2000	20	9 with 2 pending sales	Condo/ Ranch	2/1.75	18 units: 1,056 sf 2 units: 1,200 sf	Average Sales: \$106K	\$100	empty nesters	Elevator, Work- out room, and 2- car garages on ground flr.	3-story building, with 1-level units. All of the units sold face away from the RR property. No pre-sales. Four condo owners are currently renting out units. The 1,200 sf units were the first to sell.
Collin's Court 600 Collin's Court	1998	5	5	Condo/ 2-story	4/3.5	3,000	Current: \$170K - \$192 K	\$57 - \$64	55+ years old, retirees	na	All pre-sold before construction. Very private and has great views of the city. 2-car attached garage.
Pirate's Cove Riverfront property south of Memorial Bridge <i>Cook Construction</i>	1997/1998	10	10	Condo/ Ranch	3/2	2,200 - 2,800	\$200K - \$250K	\$90	Divorcees, widowers, business professionals	Underground parking, elevator	Upscale. All built on spec. 3- story bldg. 5 units sold within 1st year; 3 units in 2nd year; last 2 units over 4 years. Few buyers from Mandan.

Source: URS Corp.

# Mandan Residential Developments



### ***Single-Family Residential Developments***

In addition to the recent condominium developments, there have been several single-family residential developments currently under development within Mandan, which are highlighted below.

**Plainview Heights.** This development, located on the northwest side of Mandan, began in 1989 and is still presently being built-out. Developer Lee Mitzell indicated that he builds and sells an average of 25 homes per year in this subdivision with sales prices ranging between \$97,000 - \$150,000. The single-family homes range from 840 to 1,300 square feet in size.

**Developer's West.** This development is also located on the northwest side of Mandan and is planned for a total of 150 homes. Developer, Lee Mitzell has sold on average 12 homes a year. The sales prices range between \$97,000 to \$104,000 for 840 to 1,300 square feet single-family homes. The average income for these buyers is approximately \$34,000.

**Lakewood Harbor Development.** The most recent single-family residential development in Mandan is the Lakewood Harbor Development adjacent to the Missouri River, just south of Marina Bay. Lakewood Harbor is an upscale residential development, with single-family homes being built between \$200,000 to \$1 million. Land developer, Lee Mitzel began this development in the spring of 2002 and is currently selling lots for the various phases of the project. Between the three phases of the development there are a total of 204 lots, varying in size between 10,000 to 30,000 square feet. Waterfront lots start at \$28,900 while wooded lots start at \$21,900.

The land developer indicated that 150 lots were sold within the first six months. He had originally estimated a development timeframe of 15 years, but if absorption continues as presently, he estimates the development could be completed within three to seven years.

### ***Rental Market***

URS has completed the following steps to analyze the market for rental residential development in Mandan's Downtown and along the Strip:

- Survey of recent apartment developments in the Bismarck Mandan Metropolitan area.
- Select interviews with residential brokers and developers.
- Select interviews with local educational institutions regarding student housing
- Select interviews with senior housing developments

### ***Competitive Analysis***

To better understand the rental residential market in the Bismarck-Mandan area, we surveyed seven residential rental properties in Bismarck and four rental developments in Mandan which have recently been completed or are currently under construction. The survey information assists us in measuring market demand and supply for rental units, as well as determining price points, unit size, and desired amenities. Detailed tables of information gathered for rental residential properties in Bismarck and Mandan are located in Appendix C.

### ***Bismarck Rental Residential Market***

Properties interviewed include:

- *Terrace Point*, 3635 Valcartier Street
- *Cottonwood*, 2020 South 12<sup>th</sup> Street
- *Alberta Heights*, 4111 Lockport
- *Kirkwood Manor*, 140 Indiana Avenue East
- *North Pointe*, 1930 East Capitol Avenue
- *Turnpike*, 2140 North Xavier Street
- *Westwood Park*, 1101 Westwood Street

Trends that were found in the interviews with the individual properties were supplemented by discussions with property developers when needed. Information found included:

- Occupancy among newer developments has been constant in the upper 90 percents, with some properties using a waiting list.
- The Bismarck residential rental market is not highly concentrated in just one area, but rather is spread throughout all areas of the city. However, the new apartment developments surveyed are located on the north side of the city.
- Rents for the projects for two bedroom units ranged from \$0.52 to \$0.74 per square foot and range in monthly rents between \$550 and \$715. Smaller one-bedroom units have rents between \$0.61 to \$0.84 per square foot and range in monthly rents between \$460 and \$610.
- One-bedroom units range in size from 550 to 825 square feet with a median size of 736 sq. ft. Two bedroom units range from 816 to 1,050 square feet with a median size of 960 sq. ft.
- The 2-bedroom units are in the highest demand. One and three bedroom units are much lower in demand and studio units have very limited presence in the market.
- The developments which have been built within the past couple of years tend to be slightly larger than the older properties. The 2-bedrooms in the new complexes are closer to 1,000 square feet while the older properties surveyed

are typically between 800 – 900 square feet. This trend is also true for the one-bedroom units.

- The renter profile of the properties surveyed is a mix between students, seniors, young couples, and single adults.
- Occupants of the lower rent units are typically younger people having first moved into the area.

#### ***Mandan Rental Residential Market***

Four rental properties in Mandan were surveyed, two of which were currently under construction and the remaining two were partially completed and occupied. These properties include:

- The ***Library Square Apartments*** on First Street and Collins Avenue
- ***River Place Apartments*** on 3111 Marina Road SE
- A 48-unit complex on Old Trail Road across from the Seven Seas Hotel
- A 12-unit building off of 46th Ave in the Marina Bay Area

From our interviews with the properties' owners and developers, we identified the following trends in Mandan.

- Mandan will be experiencing a significant increase in its rental unit supply within the next year. The four properties surveyed will bring a total of 130 new rental units into the market, 46 of which are for seniors.
- The majority of the units surveyed are 2-bedroom units, ranging between 1,100 to 1,200 square feet and have average rents of approximately \$0.58 per square foot with monthly rents running between \$650 and \$715.
- The completed units of the apartments located on Old Trail Road are 91% occupied and the River Place Apartments are 50% occupied. River Place's low occupancy rate can most likely be attributed to its recent December 2002 completion and is still in its lease-up stage.
- The new apartment developments in Mandan are providing amenities such as 1-2 car garages and washer and dryers in each unit.
- The apartment developments in Mandan are smaller in scale as compared to apartment complexes in Bismarck. Mandan developments range between 12 to 48 units, while Bismarck developments are on average approximately 60-units.
- The new two bedroom apartments in Mandan appear to be slightly larger in size at about 1,100 – 1,200 square feet compared to new 2-bedroom units in Bismarck which are on average between 950 – 1,000 square feet. These units generally command the same rents of around \$700.
- The renter profile generally is retirees and young couples, with some students.

Listed below are the summary highlights of the apartment developments that were surveyed in Mandan.

**Library Square Apartments.** This development is located in Mandan's downtown at First Street and Collins Avenue and is being developed by MetroPlains Development out of Minneapolis, MN and Lewis and Clark Community Works, a non-profit organization in Bismarck. MetroPlains Development has built approximately 200 residential units in Bismarck within the last four to five years. During this time they became familiar with the area and learned there was a need for affordable elderly housing in Mandan.

The development is currently under construction with an estimated completion date of September 2003. It will include 46 affordable senior apartments, targeted to those with 60% of the median income or below. Twenty-two of the units are 2-bedrooms and 24 units are 1-bedrooms. The average monthly rent will be between \$275 and \$550. Currently there are 60 people on the waiting list, with very few from outside of Mandan. The building's amenities will include the following:

- Elevator
- Community room with serving kitchen
- Guest room available for visiting guests/family
- One parking space per unit

The project received the following types of public assistance:

- Tax Credits
- CDBG Funds
- Affordable Housing Program (AHP) Funds
- Tax Increment Financing (TIF)

**48-Unit Apartment Complex on Old Trail Road.** This development located on Old Trail Road across from the Seven Seas Hotel, includes four 12-unit, 2-story buildings of which, three buildings have been completed and one is still under construction. Of the 36 units completed, only three are vacant. All of the units are 2-bedrooms with one bathroom. The units range in size and monthly rents between 1,080 – 1,200 square feet and \$625 - \$700 (utilities included). Each unit includes a washer and dryer and a single car garage with additional uncovered spaces available. The renter profile includes a mix between retirees, college students, and young couples.

**River Place Apartments.** Two 12-unit, 2-story buildings are being developed by local developer, Mike Wachter, located at 3111 Marina Road SE. The first building was just completed within the last month and the second building is expected to be completed in January 2003. Currently, half the completed units have been rented with the renter profile being retirees and persons in their 40's. Units available include 1, 2, and 3-bedroom units that are 800, 1,200, and 1,400 square feet in size, respectively. The monthly rents of the 2-bedroom units are slightly above \$700.

**12-Unit Apartment Complex in Marina Bay.** Local developer, Charles Schaeffbauer, is currently building a 12-unit apartment building in the Marina Bay area. The units will

be 1,200 square foot 2-bedroom units. Expected completion of the building is estimated to be in the next few months. Rents have not yet been determined.

### ***Student Housing***

URS interviewed the presidents of both Bismarck State College and The University of Mary regarding potential development and market demand for student housing within the Study Areas. Highlights of these interviews relating to student housing are listed below.

#### ***Bismarck State College***

- Current 2002-'03 enrollment is 2,151 full-time students and 1,017 part-time students, totaling 3,168 students. This is an approximately 32% increase in student enrollment since 1996-'97. The largest growth sector is the part-time student population, having increased 58% during this time, from 642 to 1,017 students.
- Of the 2002-'03 full-time students, 46% of them are under the age of 20, 34% are ages 20 – 24, and 20% are ages 25 years and older.
- Of the 2002-'03 part-time students, 23% of them are under the age of 20, 24% are ages 20 – 24, and 53% are ages 25 years and older.
- Based on Fall 2002 semester total enrollment, percent of students live in the following counties:
  - 43% in Burleigh County
  - 16% in Morton County
  - 21% in 16 outlying counties in North Dakota (Emmons, Grant, Kidder, Logan, McIntosh, McLean, Mercer, Oliver, Sheridan, Sioux, Wells, Dunn, Hettinger, Stark, Stutsman, Ward)
  - 10% out of State
- Currently 200 students live on campus (100 men, 100 women) in dorms that are in need of renovation. The dorms presently have a waiting list.
- Bismarck State College is interested in expanding its on campus student housing. The College is currently evaluating potential funding options to build another dorm on campus.

#### ***University of Mary***

- The University of Mary currently has approximately 2,500 students, with approximately 40% living on campus, with the remaining 60% commuting.
- Of the 2002-'03 enrolled students, 70% of them are ages 18-24 years (traditional student) and 30% are ages 25 years and older.
- Based on 2002-'03 enrollment, 582 of its students are from Bismarck and 114 are from Mandan.

### ***Student Housing Conclusions***

The interviews with the two schools indicated their desire to keep as much student housing as possible on campus or very near to campus. They believed that students who did not currently live on campus mainly lived in apartments with other students near campus or with their families.

Downtown Mandan is not located in close enough proximity to either campus to warrant a significant student housing development. However, we do believe some students will find a downtown apartment location desirable in that it offers convenience to cafes, stores, business services, and bars. In addition, if competitively priced, students may find Mandan apartments attractive over apartments in Bismarck in that a renter generally gets more space for one's money in Mandan. As noted later in the report, students are a targeted renter profile for the rental units proposed in the downtown area, as well as retirees, divorced households, young couples and single adults.

Even though the Strip Study Area is located closer to Bismarck State College as compared to the Downtown, with convenient access directly off of Interstate 94, residential development is not recommended for this area due to the commercial nature of the Strip. The traffic volumes and development patterns along Memorial Highway are not compatible with residential development.

### ***Senior Housing Market***

URS investigated the market potential for a continuum of care facility to be located in the Downtown and along the Strip. In both cases, URS conducted research of existing trends in care facilities in the Metropolitan Bismarck-Mandan area. When available, facility managers, representatives and possible future developers of such uses were interviewed.

Continuum of care facilities typically contains three components; independent living, assisted living and nursing/specialty care. The facilities are established with the intent of allowing the level of service provided to an individual to rise without relocating them to a different location. The continuum of care facilities in the Bismarck-Mandan area draws from the western portion of North Dakota, attracting residents who require additional care and those who want to live closer to their children.

Individuals we talked to discussed the fact that occupancy levels are high and that most facilities have waiting lists for residency. The waiting lists however, includes many individuals that sign up in anticipation of waiting a few years until they can gain entry. This is especially attractive to active adults that do not feel they are ready to move into such a facility quite yet.

The age of residents ranges but is typically in the early 80's for independent living and mid to late 80s for assisted living. There is a minimum age for entry for residents at most facilities of 60 years old.

Listed below are the summary highlights of the senior housing developments surveyed for this project:

**Edgewood Vista** Edgewood Vista is a private 100-unit facility in Bismarck at 3406 Dominion Street. The facility offers 58 assisted living units, 28 independent living units and 14 Alzheimer care units. Unlike other facilities, Edgewood Vista does not have a minimum age but its average resident is in its late 80's, while the youngest is 67 and the oldest is 103 years old. A majority of the residents are from the Bismarck-Mandan metro area but there is a good representation from western North Dakota by individuals following their children.

Assisted living includes three meals a day, utilities and housekeeping. The facility is currently full and has a waiting list. The property manager identified that some of its current residents are on waiting lists at nursing homes in the area.

**PrimRose** A smaller facility, PrimRose has 48 units, 17 assisted and 31 independent living-units. The facility was opened at 1144 College Dr. in Bismarck in 1995. It is currently fully occupied with a waiting list.

The entrance age is 60 but the average age is in the upper 80s. Most residents are from Bismarck-Mandan but there are also a few regional clients. There is no differentiation in the units for independent vs. assisted living and are a mixture of one and two bedrooms. The difference of independent/assisted is measured by the addition of nursing care, laundry and full meal coverage.

**Waterford on West Century**. The Waterford on West Century, a Touchmark Facility is located at 100 West Century in Bismarck. The Waterford was built in 2000 and is an upscale independent and assisted senior living center. The facility currently offers independent living cottages and apartments, assisted living apartments and is adding a memory-loss unit in an extension phase in 2003. Currently, there are 7 independent living cottages, 45 independent apartments and 39 assisted living apartments – all of which are 100% occupied.

The facility draws from a 50-mile radius, with about 80% of its 104 current residents coming from the Bismarck-Mandan area. Only four residents are from the City of Mandan. The average age of the residents is 80 years old.

The independent apartments are located in a three-story building and are a mix of studios, one, two, and three bedroom apartments, ranging between 462 sf to 1,368 sf. The rents range between \$1,025 to \$3,085 per month. Waterford indicated that the one-bedroom apartments are the most in demand, ranging between 564 sf to 857 sf.

The assisted living apartments are also located in a three-story building and are a mix of studios, one and two bedroom apartments, ranging between 440sf to 1,106 sf. The rents range between \$1,640 to \$2,830 per month with monthly medical care levels ranging between \$200 to \$1,800.

The independent cottages are two and three-bedrooms with two bathrooms, ranging between 1,258 sf to 1,906 sf. Sales prices generally run between \$150,000 to \$225,000 with an equity sharing arrangement where Waterford retains 15% to 20% of the home value. There is also a minimum \$350 monthly maintenance fee.

Phase 2 is planned to be completed in Fall 2003, which will add 20 independent apartments, 15 assisted living units and 20 beds within its memory care facility. All of the apartments will be one and two bedrooms. The facility also has room for a third phase of development which would probably include about 50 independent units but is not yet planned.

At the beginning of Phase 2, Waterford had a waiting list for the new units. However, the waiting list has been dwindling as units are opening up in the existing development due to deaths.

***Brandon Heights:*** Brandon Heights, located in Bismarck, is a 60-unit independent living facility. Built in 2002, the four-phase development has room to grow but is waiting for more demand, given the project is 80% occupied. The facility includes one 12-unit building and three 16-unit buildings. All units are 916 square feet single-level two-bedroom units and some are fully handicap accessible.

The development of the community was made possible by the procurement of federal tax credits. Because of the credits, individuals seeking entrance to Brandon Heights must be at least 55 years old and not earn over \$22,200 for an individual or \$25,230 for couples gross annually. Starting rents are structured in line with tax credit requirements of:

- 20 units at \$270 a month for individuals earning less than \$11,100 annually, gross
- 20 units at \$506 a month for individuals earning between \$11,100 and \$18,500 annually, gross
- 20 units at \$563 a month for individuals earning between \$18,500 and the maximum annually, gross

All units at the lower two price points are occupied, forcing the management company to rent all units at the higher price point – most of which are still vacant.

Current residents are mostly from Bismarck-Mandan and the surrounding communities. A few residents have chosen Brandon Heights because they are following their children to the community from other Midwest states.

### ***Senior Housing Conclusions***

Nursing homes in the community are not unlike those across the country. A need for newer, better-equipped nursing homes exists in the Bismarck-Mandan community. These operations are very expensive to capitalize and usually require the backing of a major entity such as a religious order. The ability for continuum of care facilities to prosper in the market is due in part to the subsidy that is generated by the independent living quarters.

Nursing home development, while possibly needed in the community does not make for a vibrant downtown. It is not recommended that inclusion of a senior, continuum of care facility be added to the downtown. But there does appear to be market demand for an independent senior housing development. However, over 100 independent

senior living units are expected to come on line between the Library Square Apartments and the expansion of Waterford on West Century, which will help satisfy this demand. These two developments are targeting separate markets in that the Waterford is an upscale residential development and the Library Square Apartments are affordable units, targeted to those with 60% of the median income or below. Therefore, there may be demand for units, priced between these two developments.

It should be noted that senior assisted housing units are often attractive to seniors when these units are associated with a continuum care facility, providing assurance that one will be taken care of in one's old age. Given that a senior continuum of care facility is not recommended for the Study Areas, the condominium and apartment units recommended in the following section would help satisfy this demand for senior independent units without the major investment of a continuum care facility. Condominiums and apartments are often attractive to seniors looking to down-scale and minimize maintenance responsibilities.

## ***Residential Recommendations***

### ***The Strip Study Area***

URS evaluated both the Downtown and the Strip Study Areas for potential future residential development. The Strip's physical and economic characteristics do not lend itself to residential development. Currently, the Strip is where the majority of the economic growth is occurring in Mandan with new retail and business openings and it is recommended that the Strip be reserved for similar developments in the future. Such development would not be compatible with residential development. The Strip is critical to Mandan's future growth, in that it is strategically located, linking the City of Mandan to the City of Bismarck. Recognizing the Strips' economic importance to the City of Mandan, residential development would not be the highest and best use for this area.

### ***The Downtown Study Area***

The Downtown Study Area is recommended for future residential development. Residential development in this area could help revitalize the downtown by bringing people into the area, helping to create an active and vibrant downtown. Persons looking to be near the downtown stores, business and government services, cafes and restaurants, should find the downtown as a desirable place to reside. In terms of residential development, denser housing types incorporating mixed-use developments, such as condominium and rental developments, are recommended for the downtown to maximize the immediate population density to help create an energized and growing downtown area.

Currently, the downtown is built-out and does not have sites available for new residential construction. If the building stock in the downtown remains as is, it is recommended that the upper floors be renovated and converted into market rate apartments. However, if it is determined that building demolition will be required for environmental remediation, it is recommended that some of these cleared sites be used for new residential development. Due to the uncertainty and the many unknowns that currently exist with the environmental contamination, it is difficult to identify redevelopment sites and project the number of new residential units that could be built in the downtown area. Therefore, the projected number of residential units presented in the below table are based on market demand factors and not on land availability.

If residential development is built in the downtown area, marketing and educational programs will most likely be warranted to help dispel and answer any of the public's fears or questions regarding living in an area that had been environmentally contaminated.

***Residential Product***

The following table highlights the recommended residential development program for the downtown.

<b>Recommended Residential Development Program</b>					
<b>Unit Type</b>	<b>Number of Units</b>	<b>Unit Size (sf)</b>	<b>Number of Bedrooms / Baths</b>	<b>Sales Price/ Monthly Rent</b>	<b>Target Market</b>
Condominiums	24 - 32	1,200 - 1,400	2 / 1.5	\$100,000 - \$120,000	Empty Nesters, retirees, single adults
Rental Apartments	30 - 40	700 - 800 1,000 - 1,200	1 / 1 2 / 1-1.5	\$500 - \$625 \$650 - \$700	Retirees, young couples, students, single adults
<b>Total Units</b>	<b>54 - 72</b>				

Source: URS Corporation

Population density is key in creating an active and energized neighborhood, which is especially important in this downtown redevelopment opportunity. To create such an active environment and to maximize the potential development density of potential redevelopment sites, two to three story building structures are recommended for both condo and apartment units, as well as apartment units on the upper floors of existing buildings.

All of the condo units are recommended to be one level units with two bedrooms and one and a half bathrooms, ranging between 1,200 – 1,400 sf. Seven hundred to 800 square foot one bedroom units with one bathroom and 1,000 to 1,200 square foot two bedroom units with 1.5 bathroom apartment units are recommended. The units are also recommended to have one to two-car garages, since parking is limited in the downtown area. The proposed apartment units located on the upper floors of existing buildings should be provided with conveniently located uncovered spaces.

***Number of Units and Absorption***

Based on the comparable condominium and apartment developments surveyed, the Mandan-Bismarck residential market, and industry standards, we are assuming a condominium density of between 10 to 12 units per acre and an apartment density of 15 to 17 units per acre.

A total of 24 to 32 condominium units and 30 to 40 apartment units are recommended for the downtown area based on market demand. As indicated earlier in the report, condominium absorption has been varied over the years in Mandan, with condos on Marina Road South East averaging one unit absorption per month while the Pirate's Cove development averaged a two unit absorption per year. Based on building permit data between 1993 – 2002, Mandan experienced a per year average of approximately 10 new condominium units and 24 new apartment units. Taking these factors into consideration and if competitively priced, an average monthly absorption of 0.5 condominium units and 1.0 apartment units can be expected.

A total development time for the condominium units is estimated to run between four to five years and three to four years for the apartment units. With the influx of 84 new market rate apartments that have recently been completed this past year or are currently under construction, the Mandan apartment market appears to be a bit soft. It is estimated that it will take two to three years before demand for apartment units exceeds supply in Mandan.

### *Pricing*

Based on the price points of the residential developments surveyed and the MLS data for 2000 – 2002 residential sales and listings in Mandan and Bismarck, it is recommended the proposed condominium units for the downtown area be priced between \$100,000 to \$120,000 and the rental units be priced at monthly rents between \$500 to \$625 for one bedroom units and \$650 to \$700 for two bedroom units. The majority of the recent successful condominium projects in Mandan are located on the southeast side of Mandan near the Missouri River, with sales prices ranging between \$100,000 to \$137,000. Taking into consideration that residents may view a downtown location as inferior to a location near the river, it is important to adjust the sales prices accordingly. In order to attract potential buyers and to introduce the community to a more “urban style” residential development concept, the units will need to be priced slightly below the units surveyed at about \$100,000 to \$120,000.

The apartment units should be competitively priced between \$500 to \$700 a month including utilities. At these price points, the units will offer potential renters a better value than apartments in Bismarck, in that they will get more space for the same price. The recent upswing in rental construction and absorption indicates that there is a strong market for rental units in Mandan.

### *Target Market*

The market area from which the majority of the residents are likely to come is Mandan and outlying unincorporated areas. Even though the condominium developments in Lakewood Harbor were successful in attracting Bismarck residents, it is believed that this will not hold true for the downtown location. Lakewood Harbor is at an advantage in that it is being developed as an upscale residential neighborhood located along the river and is just seconds away from Bismarck. Bismarck residents will most likely consider the Mandan downtown location as too far away and not as attractive as a riverfront location.

The condominium units are best targeted to empty nesters, retirees, and some unconventional households, such as divorced parents or single adults, having household

annual incomes of between \$40,000 - \$60,000. The rental target market is retirees, divorced households, students, young couples and single adults.

### ***Area Wide Home Improvement Strategy***

In addition to the new residential construction recommended for the downtown area, a rehabilitation program for the existing housing in the surrounding blocks north of downtown is recommended. Improvements to the neighboring residential area will help improve the appearance, character, and property values of the neighborhood, which in turn will have a positive affect on the image of downtown and will draw additional residents to the downtown area. Strategies to promote such investment and improvements are identified below.

#### ***Rehabilitation***

Existing owners should be offered low-interest loans to encourage them to maintain and upgrade their properties. We recommend a forgivable loan and/or grant program that provides \$5,000 - \$20,000 per unit, depending on the condition of the structure.

#### ***Systematic Code Enforcement***

An effort should be undertaken to identify code violations in houses and buildings within the downtown and surrounding blocks. The City should designate a code enforcement staff person to focus on the downtown and surrounding environs. Property owners who are not in compliance should be offered assistance through the proposed rehabilitation programs.

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## ***RETAIL ANALYSIS***

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To evaluate the retail development potential for the Downtown and the Strip Study Areas, the following tasks were completed:

- Site review – Downtown and Strip
- Trade Area Analysis
- Survey of the retail coverage patterns within a 10-mile ring of the Study Areas.
- Interviews with existing downtown business owners and numerous real estate professionals with extensive commercial and retail experience.
- Analysis of retail sales trend data.

### ***Downtown Mandan' Retail Environment***

Presently, there is very limited retail supply within Downtown Mandan. The downtown is spotted by a number of small independent shops that offer a range of merchandise and services, however, none of the stores sell general shopper goods, such as apparel or home goods. Some of the key retailers in the downtown include: a drug store, butcher, hardware store, grocery store, Native American gift store, an antique shop specializing in bird accessories, a western shop, hair salon, coffee shop, and bars.

Within the last few months, downtown experienced two business closures including one of downtown's two hardware stores and the local furniture store.

Due to the lack of shopper goods in the downtown and the lack of a major retail center within the community, Mandan residents regularly have to travel to Bismarck for the majority of their retail needs as illustrated by the 10-mile ring retail coverage pattern maps located in the appendix.

The retailers that have proved to be successful in Downtown Mandan are those that have differentiated themselves from the standard national retailer typically located in neighboring Bismarck. These stores generally focus on offering its customer excellent customer service and/or an unique product. For instance, for ***Marv's Hardware Store*** to remain competitive, it opened a gun shop in its store about eight years ago. Since there are only two other gun shops in Bismarck, this helped draw customers from outside of Mandan to the store, ultimately increasing the store's revenue. The store's owner estimates that about 45% of its gun customers are from Bismarck, and about 75% of its total customers are from Mandan. However, the store's revenue is generally split 50/50 between gun and hardware sales.

The ***Five Nation's Arts*** and ***For The Birds & More*** are both specialty stores, serving as retail destinations for their customers. The ***Five Nation's Arts***, a Native American gift shop that opened in 1992 in the renovated train depot building, has attracted both tourists and Bismarck-Mandan area locals as its customer base. The specialty store, ***For The Birds & More***, recently opened in July 2002 and offers a variety of goods relating to birds, as well as antiques and works from North Dakota artists. Since the store's

opening it has drawn a healthy customer base from both Bismarck and Mandan, as well as throughout the State.

### ***The Strip's Retail Environment***

The character of the Strip can be generally summarized as highway commercial. The Strip has been developed on an ad hoc basis over the years with no cohesiveness or coordinated plan in terms of land uses and aesthetics. The majority of the Strip's retail businesses include car and motor home dealerships, farm implement retail, and nurseries.

Over the years the Strip area has become an economic engine for the City of Mandan, attracting a number of new developments along Memorial Highway. The driving force behind most of this new investment is the Strip's close proximity to both the City of Mandan and the City of Bismarck. Such new developments include:

- *A Bobcat Dealership*
- *GM/Pontiac Dealership expansion*
- *Harley Davidson Store*
- *Kroll's Diner*
- *Windsor Square* (Strip Center)
- *Raging Rivers Water Park* (south of Memorial Highway)

Businesses located on the Strip see themselves as having an advantage in that they are strategically located to easily draw customers from both Bismarck and Mandan. Presently, there are large tracts of available vacant land that could support major retail growth in the area, potentially developing this area into a major regional retail center.

### ***Recent Commercial Developments and Lease Rates***

As indicated above, a number of new commercial developments have been built within the last several years both in the downtown, the Strip, and the surrounding area. The table below highlights such development projects in terms of year built, total square footage, unit size, vacancies, lease rates and tenants.

Recent Retail Developments, Mandan, ND, 1999-2002

Name and Location/ Developer	Year Built	Total Square Footage	Percent Vacant	Current Tenants	Lease Rates	Unit Size (S.F.)	Comments
Lakewood Commercial 46th Ave SE & McKenzie Dr Lee Mitzel/Lakewood Harbor Development Co.	In Planning	na	100%	na	na		Easy access to "The Strip" and the Expressway loop of I-94. Lots range in size from 89,000 sf up to 22 acres.
Burlington Street Plaza Third Ave SE Al Leingang	2000	12,801	50%	Curves (Fitness Center)	\$9 gross + 1,400 - \$1CAM	1,700	Broker: Pat Maddock, 701-391-8867 Has 5 year tax abatement Has ability to expand 8,000 sq ft on each side.
507 E. Main Street Plaza Cook Construction	2000	6,000	0%	Dollar Store, H&R Block, Chiropractor, Medicare Alert	approx. \$9.50 psf plus utilities	approx. 2,000 sf	Has 5 year property tax abatement. Built on spec. Fully leased in about 1 year after construction. Recruited heavily to get tenants. Two tenants new and two relocated from W. Mandan.
GateCity Bank East Main Street Cook Construction	2000	3,000	0%	na	na	na	na
Windsor Square Memorial Highway Mike Wachter	1999	6,000+	40%	Hair Salon, Apartment and Storage Leasing	\$8 psf plus utilities	1,200 - 3,800	1 unit (3,800sf) has been vacant approximately 6 months. Former tenant, office supply store went out of business.
517 E. Main Street Plaza Cook Construction	1999	5,500	0%	Subway, Video Store, Hair Salon	approx. \$9.50 psf plus utilities	approx. 2,000 sf	Has 5 year property tax abatement. Built on spec. Fully leased in about 1 year after construction. Recruited heavily to get tenants. Two tenants new and one relocation from South Mandan.
Hedahls Auto Parts East Main Street Cook Construction	1999	4,000	0%	na	na	na	Tenant owns building. Relocated from downtown Mandan.

Source: URS Corporation

All of the completed developments are small in scale, ranging between 3,000 to 13,000 square feet. Four of the six developments are fully occupied with the two larger developments 40% to 50% vacant.

- Burlington Street Plaza, located on Third Ave SE just south of downtown, is almost 13,000 square feet in size and is 50% vacant. When it opened in 2000, a local restaurant had occupied one of the units, but since then it had gone out of business leaving *Curves*, a women's fitness center, as the only tenant in the center.
- *Windsor Square*, which is located on Memorial Highway, is 60% occupied, whose tenants include a hair salon and an apartment and storage leasing business. A 3,800 square foot unit has been available now at Windsor Square for approximately six months, which had been occupied by an office supply store but unfortunately went out of business.

- The two strip centers on E. Main Street, approximately 6,000 square feet in size, were both built on speculation and took approximately one year after construction to get fully leased. The developer indicated that heavy recruitment was necessary to lease the buildings. Four of the tenants are new businesses and three of the tenants are relocations from West and South Mandan. The tenants include a dollar store, *H&R Block*, a chiropractor, a *Medicare Alert* facility, a hair salon, *Subway*, and a video store.

In 1999 *Hedahls Auto Parts* built and own a new 4,000 square foot building on East Main Street. They relocated from across the street, where they had been leasing space in a building that suffered from significant deferred maintenance. Presently, this building stands vacant.

*Lakewood Commercial*, located at 46th Street SE and McKenzie Drive, is a commercial development project currently in planning. This development is currently being marketed for regional commercial development such as big-box retail. It is strategically located with easy access to the Strip and the expressway loop of I-94. Lots range in size from 89,000 square feet up to 22 acres in size.

#### ***Lease Rates***

The above table indicates that retail lease rates for relatively new construction in Mandan generally run between \$8.00 to \$10.00 per square foot plus utilities. Gross lease rates for older buildings can generally run anywhere between \$3.00 to \$7.00 per square foot, depending on the condition of the building.

Lease rates in Bismarck average slightly higher than Mandan. According to local experts, comparable Bismarck properties can average two to three dollars more a square foot at \$10.00 to \$12.00.

#### ***Retail Sales Data***

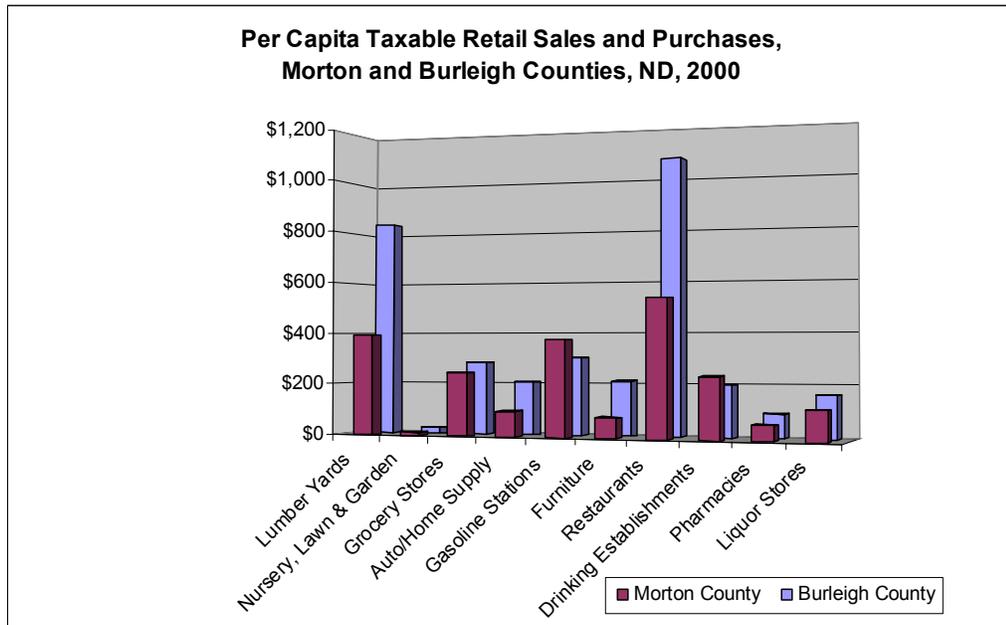
To better understand the relationship between Morton and Burleigh Counties in retail/commercial positioning, it is important to evaluate where money is being spent. Therefore, it is important to compare the taxable retail sales and purchases in Morton and Burleigh Counties. Points below highlight the data tables presented in Appendix D.

- Burleigh County's 2001 taxable retail sales of \$592 million is over seven times the amount of Morton County's \$81 million in retail sales.
- Retail sales and purchases grew approximately \$10 million from 1999 to 2001, at an average annual rate of 6.7% in Morton County to almost \$81 million. For the 11 retail sectors that data was available for, the growth averaged 8.4% annually.
- Retail sales and purchases in Burleigh County over the same time period grew by over \$52 million to \$592 million, an annual average percentage change of 4.8%. Twenty-four retail sectors in Burleigh County met data disclosure

requirements and were available, of these, the average annual growth rate was higher at 5%.

- The largest growth sector in Morton County retail was lumberyard facilities, which grew by \$5 million from 1999 to 2001 to a total of \$14.9 million. These facilities also were Burleigh County's fastest growing sector with an annual average growth rate of 13.9%.
- Of the sectors in Morton County for which data is available, only the Furniture Sector reported a declining trend in sales and purchases. This sector experienced an annual average decrease of over 6% in sales, dropping from \$2.2 million to \$1.9 million.
- Of Burleigh's available sectors, a quarter of them reported declining sales and purchases. Most notably, Music/Record Stores listed an average annual loss of 10%.

The graph below demonstrates a breakout of taxable retail sales and purchases in Morton and Burleigh counties per capita in 2000. Analyzing the data on a per capita basis is important when comparing two communities of drastically different sizes.



- Though the Lumber Yard sector is growing in Morton County, the per capita graph shows that building supplies are still being purchased in Burleigh, at a rate of almost 2:1.
- The largest discrepancy in per capita taxable sales and purchases for the categories for which data was available for both communities is for Restaurants. Burleigh County Restaurants average taxable sales and purchase of \$1,072 per resident of the county, more than twice Morton's \$529 per person. However, Morton closes the gap when Drinking Establishments are also considered, leading Burleigh County in this category \$237 to \$202.
- The only other comparable category, which Morton County leads Burleigh County in, is taxable retail sales and purchases from Gasoline Stations.

### ***Retail Trade Area Analysis***

To better position Mandan in retail/commercial development, it is important to evaluate Mandan on how it fits into the larger Bismarck-Mandan retail trade area. In addition, it is also important to be aware retail developments and trends in neighboring retail trade areas, which include Minot and Fargo. Therefore, it is important to compare the larger retail trade area of Bismarck-Mandan and its closest competitors, Minot and Fargo.

#### ***Minot Retail Market***

Minot, located one hundred miles north of Mandan and of comparable size, competes with the Bismarck-Mandan area for retail trade dollars. The Minot Mall, Dakota Square, currently has a *Target*, *Sears*, *JCPenney*, *Herbergers*, and *Old Navy*. A local retail professional noted that Minot is a strong retail center for the people of Minot and the Minot Air Force base but people will come to Bismarck-Mandan in search of higher quality goods and specialty shops.

#### ***Fargo Retail Market***

Fargo is the largest retail trade area in the State of North Dakota. Fargo enjoys two advantages over the Bismarck-Mandan community – location and population.

The retail trade area for Fargo, like Mandan, is a one hundred mile ring. The population of the retail trade area for Fargo is approximately 600,000, about three times that of the Bismarck-Mandan 100 mile ring.

#### ***Bismarck-Mandan Retail Market***

According to local retail trade experts, the trade area for Bismarck-Mandan is approximately 100 miles. The retail in the area gains population from as far west as Dickinson, east as Jamestown, south into South Dakota and even goes as far north as Minot.

There are two regional shopping malls located in Bismarck. Kirkwood Mall, located on the southern end of town, is the newer and healthier of the two malls. Kirkwood mall

was built in 1970 and expanded in 1980. It currently has an occupancy rate in the upper 90%'s. The major retail anchors include:

- *Marshall Fields*
- *Herberger's*
- *Target*
- *JCPenney*
- *Scheels*

The vacant Montgomery Ward store in the Mall has been renovated and is occupied by *Keating Furniture World*, a Minot based retailer, as of Spring 2003.

In spite of its healthy occupancy rate, the malls three screen movie theater recently closed. This leaves Bismarck with two movie theater complexes, both located on the north side of town. One is the eight-screen theater at the gateway Mall, while the other is the ten-screen Grand Theater located at 1486 Interstate Loop.

Gateway Mall is located on the north end of town and is struggling as a commercial center. Its current occupancy rate is around 66% according to one market expert, but many of the storefronts are occupied by nontraditional, non-retail operations such as religious institutions and medical clinics. Major tenants include *Sears* and *Osco Drugs*.

The strongest area of new development is in the southern portion of Bismarck, around Kirkwood Mall. The weaker retail destination is around the Gateway Shopping Center north of Interstate 94.

The Bismarck Tribune, the largest local daily newspaper in mid North Dakota categorizes the retail trade area for Bismarck-Mandan to include the counties of Burleigh, Morton Adams, Dunn, Emmons, Grant, Hettinger, Kidder, Logan, McIntosh, McLean, Mercer, Oliver, Sheridan, Sioux and Stark. Major communities within the retail trade area include Bismarck, Mandan and Lincoln. The estimated population of the area in 2001 was 167,968 people, an average annual growth rate of 0.19% since 1990. The retail market the Bismarck, Mandan and Lincoln communities grew by a rate of 1.17% annually from 1990 to 2001 while the larger retail trade area minus the three communities has been declining in population by 0.51% annually during the same time period.

### ***National Retailer Coverage Patterns, by Store Type***

URS conducted a detailed survey of national retailer coverage patterns in the Bismarck and Mandan areas. Regionally, the area draws consumers to its auto dealers, department stores, discount stores and national home improvement retailers. Because of these regional draws, the Bismarck-Mandan retail market is able to support convenience and neighborhood retail at levels above its potential. We have documented the location of all retailers in the major store categories and mapped these retailers. These maps are included in the appendix.

#### **Books**

Three major book retailers are present in the area and include *Barnes & Noble*, *Walden Books* and *B Dalton*. *Borders* does not yet have a presence in the metro area.

Given the proposed education component of the downtown redevelopment, a bookstore would be a good fit. The major book retailers, however, tend to locate in areas of high population density and high levels of education. According to our experience, Mandan does not yet meet their threshold for density and education. As the metro area continues to develop and shift new growth to Mandan, this could change.

### **Discount**

The dominant discount stores in the area are *Wal-Mart*, *K-Mart* and *Target*, each of which has one store in Bismarck. We have also included warehouse clubs in this category, of which none are located in the Bismarck-Mandan area.

A potential opportunity in the discount sector could be a warehouse club, since *Costco* does not have a presence in North Dakota and might be a candidate for Mandan. *Sams Club* is currently the only warehouse club within the State of North Dakota, with stores in Fargo and South Grand Forks.

Another potential opportunity is the discount retailer *Meijers*, which is not yet located west of the Mississippi River. *Meijer's* is based on a "hypermarket" concept that generally consists of 210,000 square feet of total retail space, which includes approximately 70,000 square feet of grocery space.

### **Electronics and Office Supply**

Major office supply retailers in the market includes *Staples* and *Office Depot*, both in Bismarck. Currently, the City of Mandan does not have a large enough base of office users to warrant a major office supply store location. However, if Mandan grows this sector as recommended later in this report, such a store could be a possibility in the future.

The major national electronics retailers, *Best Buy* and *Circuit City* are not yet in the Bismarck-Mandan market, creating a potential development opportunity for Mandan. Their closest locations are currently in Fargo. *Best Buy* could be a candidate for the Mandan redevelopment.

### **Fashion Department Stores**

The fashion department stores are primarily located as anchors in Kirkwood Mall and the Gateway Shopping Center. To our knowledge, there are no free-standing urban department stores in North Dakota.

The Kirkwood Mall is the regions premier retail-shopping destination, hosting department stores *Herbergers*, *JCPenney* and *Marshall Fields*. The *Sears* store at Gateway is the last remaining anchor in that mall.

Traditionally, we include *Old Navy* stores with the fashion department stores. While not a traditional fashion department store, *Old Navy* sells a broad range of apparel and footwear in 15,000 square foot stores, either in power center or freestanding locations. Since *Old Navy* has a store in Minot, it is conceivably a candidate for Mandan's redevelopment.

*Kohls* is currently undergoing a national expansion of its operations. They currently have a store in Fargo but do not have plans to expand in North Dakota in the foreseeable future.

#### **Fashion Specialty**

Examples of fashion specialty retailers in the Bismarck-Mandan market include *American Eagle* and *Eddie Bauer* which are located at Kirkwood Mall. In most markets, these store types tend to locate in regional malls and do not typically locate in power centers or freestanding operations.

#### **Grocery**

The dominant grocery stores in the area are *Dan's* and *Barlow's*. In addition, *Cash Wise*, *Shop-N-Go*, *Village Mart* and *SavWay* have stores in the market. Our survey covers only the immediate Mandan and Bismarck area, since urban grocery stores tend to serve a maximum five-mile trade area.

Based on Mandan's current population size, the community appears to be well served by its current grocery stores.

#### **Home Improvement**

The major home improvement store in Central North Dakota is *Menard's Home Depot* and *Lowe's* are not yet in the Bismarck-Mandan market.

*Home Depot* is currently investigating whether or not to enter the local market. *Lowe's* conversely does not think the Bismarck-Mandan Community yet fits its profile but is interested in reviewing the market if it undergoes substantial growth. Based on industry knowledge and interviews, home improvement stores prefer to be located away from its competition in markets the size of Bismarck-Mandan. Therefore, since *Menard's* is currently located on the north side of Bismarck, at 3300 State Street, it is unlikely that a home improvement store would choose to locate near the existing store. Likely development sites for such stores could include southern Bismarck or a Mandan location, if land is available.

#### **Movie Theaters**

Only two movie theaters are currently in operation in the Bismarck-Mandan market, *Carmike 8 Cinemas* at Gateway Mall and *Grand Theaters* at Interstate 94 and Highway 83 North. A 3-screen cinema is located at Kirkwood Mall but is antiquated and no longer in use.

The Mandan redevelopment is not likely to include a multiplex cinema as a component. Conversations with local parties have demonstrated that the demographic thresholds will not support an additional large-scale cinema.

#### **Off-Price**

Kirkwood Mall includes one large off-price retailer, *TJ Maxx*, and numerous smaller off-price merchants such as Payless Shoes. Although Kirkwood is positioned as a more upscale center, it remains a force in the off-price sector. As such, the Mandan redevelopment should probably not include off-price retailers.

### **Sporting Goods**

Kirkwood Mall is also strong in sporting goods, with *Scheels* and several shoe stores. This market appears well served, thus a sporting goods and/or shoe retailer might not be a strong part of the mix in Mandan.

### **Auto Dealers**

Mandan is becoming a center for regional auto dealers, specifically along the Strip. The newest and most modern auto dealers in the community, *Schwan Pontiac* and *Bill Barth Ford Mercury* are on the Strip. Also in Mandan are *Ressler's Subaru* and *Chevrolet* dealers, both located in the Eastern Main Street area. The Bismarck Mandan market is currently served by all major auto brands but many of the facilities in Bismarck are aging and will require investment or relocation in the near future.

### **Auto Part Retailers**

The Bismarck-Mandan market is currently well served by smaller auto part retailers, unlike the national trend of fewer, larger mega auto part retailers such as *Murrays* and *Trak Auto*. Given the number and success of the current auto part retailers in the area, it is not foreseeable that this is an area for new development potential. However, if a large scale retailer were to enter the Bismarck-Mandan market, the Strip would be attractive because of the prevalence of auto related industry currently there and its access to both the Mandan and Bismarck residential areas.

### **Retail Recommendations**

The study areas for Mandan's retail analysis have been carved into four districts to help better target market potentials for each area. Each of the identified districts have distinct character due to its location and existing development. These areas include:

- Downtown
- East Downtown
- The Western Strip
- The Strip

### **Downtown**

For the purpose of this retail section, the CBD is going to be defined as 6<sup>th</sup> Ave NW on the west, 1<sup>st</sup> Ave NE on the east, the Burlington Northern Tracks to the south and 2<sup>nd</sup> street to the north.

Depending on the extent of physical renewal that is required because of environmental concerns, a number of redevelopment options could be available. For instance, there may be opportunity to build new commercial structures within downtown, as well as restoring existing historical downtown buildings. Development of new structures could be an advantage because current structures in the downtown are not ideal for modern retail development. Conventional retailers are interested in stores that have frontages of almost fifty feet. The current twenty-five foot frontages in most of the downtown buildings presents a challenge for private investors to either change their product or consolidate multiple buildings as *Mandan Furniture* did. Given the option of undergoing major rehabilitation and adaptation in a downtown building or locating to a new, modern facility, many retailers would choose the latter. However, special attention should be given to minimize the loss of historic structures.

### **National Retailers**

Since a concentration of national retailers has been developed in neighboring Bismarck, it will be difficult to attract these retailers to a Downtown Mandan location. In addition, the downtown is not highly trafficked, which is a critical criterion for national retailers in selecting site locations. As discussed earlier in the report, the streets surrounding the Study Area have ADTS ranging approximately between 9,000 and 12,000 in the Downtown subdistrict. Based on industry knowledge and conversations with major national retailers, such traffic volumes would not attract or support major retailers, since they typically seek sites in high trafficked areas with ADTs of at least 25,000.

### **Niche Retail**

The retail that should be explored for the area needs to be of a niche classification, differentiating itself from what is in Bismarck. Potential options for retailers could include:

- Specialty apparel shops,
- Native American collectables
- Art boutiques
- Hand crafted jewelry.

### **Dining**

The Casual dining market is currently focused in Bismarck, located around the mall and the interstate exchange at Route 83. Currently, there are very limited choices when it comes to casual/family dining in Mandan. As earlier stated, since the downtown has relatively low traffic counts, Mandan will find it difficult to attract a national restaurant chain, such as *AppleBee's* and *TGI Fridays*. However, by securing more office development within the downtown and the Strip as discussed later in this report, the downtown would be in a better position to attract such developments. Only until the national retailers see that there is activity and a growing employment base, will they decide to locate in Downtown Mandan. Rather than relying on the national restaurant developments, Mandan should encourage locally owned dining establishments to help redevelop the downtown. Locally owned operations typically have a better feel for the market and community and do not solely rely on hard demographic criteria, such as income, population, and traffic counts as national retailers tend to do.

### **East Downtown**

Eastern Downtown is defined as the Burlington Northern property to the south, 1<sup>st</sup> Street on the north, 1<sup>st</sup> Ave NE on the west and Mandan Avenue/Memorial Highway to the east. The auto oriented retail outlets primarily characterize the corridor. This is the location of a majority of Mandan's fast food and convenience retail.

Essentially, the eastern section of Main Street's retail is able to survive without public sector interference. It has a healthy and growing mix of fast food restaurants, convenience retail, and small office operations. It is recommended that the City encourage relocation of the larger uses in this subdistrict, such as the auto dealers and the farm implement dealers to the Strip, so that East Downtown can be developed with uses more compatible to the general downtown area.

### *Western Strip*

Memorial Highway defines the Western Strip from the BNSF underpass on the west to 32nd Ave SW. This area currently has a number of large tracts of available vacant land that could be used for retail and highway commercial development. Recommended uses for this area include:

- Car/mobile home/boat dealerships
- Farm implements
- Warehousing/self storage

Additional car dealerships in this district would compliment the two existing dealerships on Memorial Highway, the *GM/Pontiac* dealership and the *Ford* dealership. Such development would help build the Strip into a regional car dealership destination area. The development as an auto destination area would assist in the development of a large regional auto parts retailer.

### *The Strip*

The Main Strip is defined as 46th Ave SE from McKenzie to Memorial Highway and Memorial Highway from Interstate 94 to 32nd Ave SW. This section of Mandan should become the focus of large scale, regional retail.

The residential development occurring in southern Mandan opens the possibility for neighborhood retail. Such retail could include a freestanding drug store with drive thru access or a video outlet, such as *Blockbuster*.

The Strip also has the ability to host larger, more regional retail than the other study areas because of its accessibility, amount of land in large tracts and proximity to newer, higher value housing developments. A lynch pin for the full development of the Strip is the inclusion of office uses that bring a higher number of daytime trips to the area.

The regional and national casual dining chains have located along the major thoroughfares surrounding Kirkwood Mall, impacting the ability to attract them to the Strip. If however, a major office user is attracted to the Strip, an outlot of said development would be well suited for a casual dining operation.

The only Home Center found is at the edge of the 10-mile ring across from the Gateway Shopping Center. *Menards* is the one store in the market. An additional home improvement center would both be well served to enter the Bismarck-Mandan area. Given its access to the expressway, ease of site assembly and known presence in the market, the Strip offers an excellent location for both these operations.

*Home Depot* is currently investigating the Bismarck-Mandan Community for future. According to the company, they have not yet settled on which side of the Missouri River to locate, much less a site specifically. A criterion that they are going to be looking for in the market is accessibility of a site that is between 11 to 17 acres. Incentives are not a large part of the decision process for the site selector but they do come into play. Ideally, *Home Depot* would like to receive free land from a city. Other incentives will help the deal, as long as they do not come with too many strings, as many communities place on them.

The development of a center based around a store such as *Home Depot* is an opportunity for the development of big box store types, given the size of the sites and the fact that the market is under-served by these store types. There are currently zero large electronic stores, such as, Best Buy or Circuit City within the 100-mile trade area. If a major anchor such as *Home Depot* locates here, other stores such as *Kohl's* and *warehouse clubs* may also consider this location.

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## CONVENTION/HOTEL MARKET ANALYSIS

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This section includes an analysis of the Downtown and the Strip Study Areas for additional convention/meeting and hotel space. To evaluate the potential, URS has completed several tasks, which include:

- Gathered trade data on convention/meeting space and full service hotels in the Bismarck Mandan Area. Detailed tables of this data are located in Appendix D of this report.
- Interviewed local meeting professionals with extensive knowledge of the Bismarck Mandan Metropolitan Area Hotel markets to investigate demand.
- Interviews with hotel developers to investigate the opportunity for a new hotel.
- Interviewed local hotel professionals with extensive knowledge of the Bismarck Mandan Metropolitan area Hotel markets.

### *Meeting Facilities*

#### *Bismarck Civic Center*

The Bismarck Civic Center is the largest meeting facility in western North Dakota with over 85,000 square feet of flexible meeting space. The arena and exhibit hall can accommodate groups between 1,000 to 10,000 persons and its 15 meeting rooms can accommodate smaller groups between 10 – 800 persons. A breakdown of the meeting space is as follows:

Arena	30,096 sq.ft.
Exhibit Hall	48,600 sq.ft.
<u>Up to 15 meeting rooms (total)</u>	<u>17,000 sq.ft.</u>
Total	85,696 sq.ft.

- Associations prove to be the predominate user of the Civic Center. Most of the associations originate in the State of North Dakota. There are also many SMERF (Social, Military, Education, Religion, and Fraternal) events booked.
- The Civic Center is not connected to a hotel, nor is it associated with any one in particular.
- The Civic Center is within walking distance of Bismarck's downtown entertainment district.
- The local hotels with large meeting spaces are the main competitor for meetings or conventions of 1,000 or less people. The Center charges for the use of its space while area hotels tend to give the space at a reduced or free price if tied to room bookings.

- According to the Civic Center, they are meeting the local demand for convention space. They report healthy bookings with approximately two to three turn aways a year due to overbooking or size constraints. Portions of the facility are booked almost every day while the large spaces are utilized on average 4 to 6 days/nights a week.

***Mandan Community Center***

The Mandan Community Center is the largest meeting facility in Mandan with over 13,000 square feet of flexible meeting space. A breakdown of the meeting space is as follows:

Auditorium	12,000 sq.ft.
<u>2 meeting rooms (total)</u>	<u>2,500 sq.ft.</u>
Total	13,400 sq.ft.

- The auditorium space at the Mandan Community Center is a gymnasium with tile flooring. The Parks Department would like to use this space for conventional recreational/athletic programs rather than for community events.
- There is a strong demand for community space at the Center. Almost every weekend the Center's gym is rented for community functions. As of December 2002, 39 events have been booked for 2003, of which 31 of them will take place on the weekends. Only three of these events are athletic related: two volleyball tournaments and a taekwondo tournament.
- The first weekend of every month, a flea market occupies the space. Other events that require use of the gym for non-traditional uses include: weddings, auctions, gun shows, agriculture days (live animals once a year in march), art and craft shows, etc. Included in the appendix is the Community Center's 2003 events schedule, which highlight the many events that have been booked to date for 2003.
- The Park District of course would rather be using gym for more traditional gym uses on the weekend but has begun to rely on events' revenue to cover costs. Currently the revenue is averaging approximately \$60,000 annually, which equals about a third of its annual budget. Gym space rental fees average \$600, including \$300 for the space itself, \$100 for set up, and \$150 security.
- The two smaller conference rooms are rented for smaller events such as meetings or showers. These spaces rent for \$15 an hour or \$75 a day. Local residents enjoy using the facility because they are able to forgo fees charged by the hotels and civic center by providing their own food and beverage.
- The gym is booked Monday-Thursday evenings for adult sport programs/leagues.

- The Park District has identified the need for an events center that would hold functions for 100-300 people. Such a center would accommodate events such as weddings, meetings, performances, flea markets, etc. that are currently being held at the gym.
- Downtown would be an ideal location for a community events center due to its centralized location. The events center would help bring people to the downtown, creating an active and energized town center.

***Local Convention Hotels***

The Bismarck-Mandan Area hosts four hotels with large conference/convention spaces. The ***Seven Seas Inn and Conference Center*** in Mandan and Bismarck's ***Radisson, Ramkota Best Western*** and the ***Doublewood*** combine for approximately 60,000 square feet of flexible meeting space. A breakdown of the meeting space is as follows:

Seven Seas	10,378 sq.ft.
Radisson	10,505 sq.ft.
Ramkota	28,000 sq.ft.
<u>Doublewood</u>	<u>10,818 sq.ft.</u>
Total	59,691 sq.ft.

- The local hotels are able to discount the cost of the meeting space as well as food and beverage costs through room guarantees.
- The hotel property managers all identified a surplus of space on the market. Each property identified that there are few occasions when they need to turn business to another facility.
- Because the ***Radisson*** and the ***Ramkota*** are under the same ownership, the properties are able to share marketing and event resources.

***Hotel Market Analysis***

Data relevant to the development of a hotel in Mandan includes:

- Local hotels are having a depressed year with annual occupancies around 60% through November for the hotel properties analyzed.
- Average Daily rates for hotels average \$6 - \$10 more in Bismarck than in Mandan for comparable properties.
- A local developer is looking at sites in Bismarck for either a new or reflagged ***Holiday Inn Express***. The ***Holiday Inn*** site selection team identified that they will only consider Bismarck and not Mandan for future development.

### ***Competitive Analysis***

URS conducted interviews with management at three of the existing regional hotels with meeting and banquet space to gain insight specifically into the downtown hotel business. The hotels interviewed include:

- The *Seven Seas Best Western*, Mandan
- The *Ramkota Inn*, Bismarck
- The *Radisson*, Bismarck

#### **Seven Seas Inn and Conference Center**

Location: 2611 Old Red Trail, Mandan  
Size: 103 rooms  
Average Daily Rate: \$50, advertised at \$79  
Occupancy: 60%  
Primary Guest: Group business, primarily State associated business  
Meeting Space: 10,378 square feet

#### Comments:

The Seven Seas is the only limited to full service property in Mandan. The owner of the property indicated that the quality of service at the Seven Seas is a primary reason they have repeat business. An additional hotel property in the market would hurt the Seven Seas to the point of possibly forcing them out of business. The owner also indicated that the convention space drives hotel occupancy.

The largest continual space in the Seven Seas is the Pier 7 room at over 4,500 square feet. The room is able to hold mid sized events of 500 people if positioned for banquet seating or 700 people if positioned as an audience type meeting. Being in close proximity to the state capital is important to the Seven Seas because a majority of its meetings are government related. The hotel also hosts some religious and association functions, as well as weddings and other private groups.

#### **Ramkota**

Location: 800 South 3rd St, Bismarck  
Size: 306 rooms  
Average Daily Rate: \$69 (advertised)  
Occupancy: na  
Primary Guest: Convention/meeting guests  
Meeting Space: 28,000 square feet

#### Comments:

The Ramkota Best Western was recently re-flagged from a Radisson and labels itself primarily as a convention hotel. The ballroom is the largest in the Bismarck-Mandan market at 12,000 square feet, aside from the Civic Center. Seating in the ballroom is limited to 1,300 people for banquets. The property owner also owns the Radisson Hotel in downtown Bismarck.

More than half of all travelers to the Ramkota are groups or are attending a convention/meeting at the property or down the street at the civic center.

### **Radisson**

Location:	6th Street and Broadway, Bismarck
Size:	215 rooms
Average Daily Rate:	\$ 84 (advertised)
Occupancy:	na
Primary Guest:	Business travelers
Meeting Space:	10,505 square feet

#### Comments:

The Radisson was until this past November 1<sup>st</sup>, a Holiday Inn. As part of the change, the property has undergone a multi million-dollar modernization/renovation of the entire facility. The hotel is the closest full service property to the State Capital. Meeting space is limited to 10,505 square feet, which includes a ballroom and 13 meeting rooms. The 4,000 square foot ballroom is able to host a reception of 500 people but sit only 325 people at oval tables. The ballroom is utilized for meetings as well as many social functions.

### ***Recommendations***

There is a perceived notion in the community that there is a need for banquet space on the magnitude of 2,000 – 3,000 people. In our investigation, we were able to identify that such a facility would be utilized in the market on an occasional basis. Financially, a banquet hall of that size is a major endeavor. With the smaller hotel spaces and the Civic Center only turning away a few functions, we have not found an adequate market gap that would sustain a stand-alone facility. That being said, it does appear that such a facility could be feasible in the future if demand increases and if connected to an existing meeting/convention facility.

However, as discussed earlier, there is a need for a civic center, accommodating 100-300 people so that the gymnasium of the Mandan Community Center could be returned to its intended purpose of hosting athletic programs and activities. Downtown would be an ideal location for a community events center due to its centralized location. Such a facility is estimated to be approximately 15,000 – 35,000 square feet in size. The events center would help bring people to the downtown, creating an active and energized town center.

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## ***ECONOMIC DEVELOPMENT TOOLS***

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### **Existing Mandan Strategies**

The City of Mandan has several economic development tools in place to encourage private investment within the City. These tools include:

- Mandan Growth Fund
- Property tax abatements
- Tax Increment Financing (TIF)

#### ***Mandan Growth Fund***

In 1991, the City of Mandan established the Mandan Growth Fund (MGF), a funding mechanism intended to provide assistance to businesses that desire to expand or locate in the Mandan area. MGF is funded by a portion of the City's 1% general retail sales tax revenue. The annual average appropriation for the MGF is approximately \$250,000 to \$300,000. In the past, the funds needed to be used on an annual basis. However, this practice was recently changed to allow for "banking of funds", which will equip the City with an effective tool to undertake large-scale redevelopment and economic development projects.

#### ***Property Tax Abatements***

The City of Mandan currently uses property tax abatements to assist new business development within the area. A number of developments have been granted 5-year property tax abatements, including the Burlington Street Plaza, 507 East Main Street Plaza, 517 East Main Street Plaza, and the Bill Barth Ford Mercury Dealership on Memorial Highway.

#### ***Tax Increment Financing (TIF)***

The City of Mandan currently uses TIF to encourage economic development within the city. There is presently one TIF district in downtown, which was created in 2001 to assist the affordable senior housing "Library Square" development project, located at the northwest corner of Collins and 1<sup>st</sup> Street NW.

TIF can be an extremely effective economic development tool for large-scale redevelopment projects. By designating a large area, such as the downtown, rather than a single site, municipalities have a long-term funding tool in place to effectively respond to redevelopment opportunities as they arise over time. This is extremely important when the redevelopment opportunities are time sensitive and require timely response by the City. Also, TIF gives a municipality the authority to exercise the power of eminent domain, which could greatly expedite a large-scale redevelopment project, such as Downtown Mandan. Eligible costs that TIF revenue can be used for include the following:

- Property acquisition
- Building demolition and site preparation

- Building rehabilitation
- Public improvements, such as the construction/reconstruction of streets, utilities, parks, and other public works or improvements necessary for the redevelopment project
- All interest and redemption premiums paid on bonds, notes, or other obligations issued by the municipality to provide funds for the payment of eligible TIF project costs.

### ***Additional Economic Development Tools***

In addition to the above economic development tools, the following tools are also recommended to foster economic growth within the City of Mandan:

#### ***Local Funding Tools***

- Land assembly and write-down
- Building acquisition and write-down
- Guarantee of property value
- Permit fees waived
- Special Service Areas (SSAs)/Business Improvement Districts (BIDs)
- Low interest/forgivable loan programs

#### ***State Funding Tools***

- Renaissance Zones
- State Administered Community Development Block Grant (CDBG) Funding
- MATCH Program
- PACE Fund
- Income tax exemption and incentives
- Job Training Assistance
- Business Development Loan Programs
- North Dakota Development Fund
- Strategic Partners

#### ***Federal Funding Tools***

- Section 108 Loan Guarantee Program
- Economic Development Initiative (EDI) Grants
- Brownfields Economic Development Initiative (BEDI) Grants
- U.S. EPA Brownfield Assessment Grants
- U.S. EPA Brownfield Revolving Loan Fund Grants
- U.S. EPA Brownfield Cleanup Grants

#### ***Local Funding Tools***

##### **Land Assembly and Write-Down**

Land assembly is an effective way for the City to ready itself for redevelopment. Development projects are much easier and timely if the land is already assembled and under one ownership. Many times when property is under the control of multiple

property owners, it can be difficult for the prospective developer to gain ownership of all the sites at a fair market price and in a reasonable time frame.

Land write-downs is another way in which the City can provide gap financing to help Mandan be competitive to Bismarck locations.

#### **Building Acquisition and Write-Down**

Similar to land assembly, the City should be proactive and begin to acquire buildings targeted for redevelopment. By having ownership of buildings, the City is in a better position to direct the type of development it envisions for the area, as well as having the ability to provide building write-downs to potential businesses looking to expand or locate to the City of Mandan.

#### **Guarantee of Property Value**

In light of the current environmental issues currently surrounding the downtown area, it is recommended that the City take out an insurance policy guaranteeing property values for future property owners. This will help eliminate possible fears and uncertainty regarding investing in downtown property.

#### **Permit Fees**

To help reduce the cost of development, the City should waive permit fees for targeted areas in the City.

#### **Special Service Areas (SSAs)/Business Improvement Districts (BIDs)**

SSAs and BIDs are community imposed taxing authorities within a designated project area. Funding typically is generated from a tax levy on property values but it can also be generated through a flat rate per owner. Revenues can be used for capital improvement projects, landscaping, marketing, administration, safety, transportation, and maintenance.

#### **Low Interest/Forgivable Loan Programs**

Low interest loans are an effective way to assist new and expanding businesses in obtaining loans that would have a higher degree of risk than would normally be acceptable to a lending institution. The State of North Dakota owns, controls, and operates its own development bank, the Bank of North Dakota. The Bank of North Dakota currently has such program already established which businesses can utilize.

#### **State Funding Tools**

##### **Renaissance Zones**

The City of Mandan should take advantage of the State of North Dakota's Renaissance Zone Program, where a City can designate an area of up to twenty square blocks as a Renaissance Zone for a period not to exceed 15 years. A city may not propose or be part of more than one renaissance zone. Businesses and individuals may qualify for income and property tax exemptions and credits for purchasing, leasing, or making improvements to residential and commercial property located in a renaissance zone.

### **State Administered CDBG Funds**

The primary objective of the CDBG program is to develop viable communities by providing decent housing and a suitable living environment and by expanding economic opportunities, principally for persons of low- and moderate-income. The State must ensure that at least 70 percent of its CDBG grant funds are used for activities that benefit low- and moderate-income persons over a one-, two-, or three-year time period selected by the State.

In 2002 the North Dakota State Program was granted \$6,410,000 in CDBG funding. Of this funding, approximately \$2.5 million is retained by the Governor's office to be allocated to special projects.

***Eligible Activities*** include the following:

- Acquisition of property for public purposes
- Construction or reconstruction of streets, water and sewer facilities, neighborhood centers, recreation facilities, and other public works
- Demolition
- Rehabilitation of public and private buildings
- Public services
- Planning activities
- Assistance to nonprofit entities for community development activities
- Assistance to private, for profit entities to carry out economic development activities

### **MATCH Program**

The MATCH Program is designed to encourage and attract financially strong companies to North Dakota. The program targets manufacturing, processing, and value-added industries. Through this program, the Bank of North Dakota will participate in loans to financially strong companies and provide interest rates at some of the lowest in the nation.

### **PACE Fund**

The PACE Fund assists North Dakota's communities in expanding their economic base by fostering new job development. This program has two major elements, which include:

- The participation by the Bank of North Dakota with a local lender in a community based loan.
- The participation by the PACE Fund with the local community in reducing the borrower's overall interest rate.

### **Income Tax Exemption and Incentives**

The State has a number of programs in which businesses can take advantage of to help reduce their overall cost of doing business. For instance, the State grants an income tax exemption for up to five years for a new or expansion project in a primary sector business or tourism. Also, a corporation doing business in North Dakota for the first time may take an income tax credit equal to:

- 1% of wages and salaries paid during the tax year for each of the first three years of operation; and
- ½% of wages and salaries paid during the tax year for the fourth and fifth years.

**Job Training Assistance**

A State program is available that assists a new or expanding primary sector business with training new employees. The cost of the training under the program is paid for in whole or in part with the income tax withheld from the new employees.

**Business Development Loan Programs**

The Business Development Loan Program through the Bank of North Dakota is designed to assist new and existing businesses in obtaining loans that would have a higher degree of risk than would normally be acceptable to a lending institution.

**North Dakota Development Fund**

A North Dakota Economic Development and Finance fund provides flexible "gap" financing through loan and equity investments to new or expanding primary-sector businesses in North Dakota.

**Strategic Partners**

The Bismarck Mandan Development Association has relationships with local service providers. Partnering with BMDA, many of these utility service providers will negotiate favorable terms, grants, and conditions for new or expanding companies.

**Federal Funding Tools**

**Section 108 Loan Guarantee Program**

Section 108 Loan Guarantees are designed to enable cities to undertake large-scale redevelopment projects, by allowing cities to borrow against future CDBG funds. This funding offers flexibility in terms of how the money can be spent, which is key in taking on complex and unconventional types of projects. Activities that are eligible for funding with these loan guarantees include:

- Acquisition of real property
- Rehabilitation of publicly owned real property
- Construction, reconstruction, or installation of public facilities and infrastructure
- Environmental cleanups
- Related relocation costs
- Demolition
- Clearance and site preparation
- Payment of interest and financing costs
- Housing rehabilitation eligible under CDBG

State assisted public entities may apply for up to five times the latest approved CDBG amount received by its State, minus any outstanding Section 108 commitments and/or

principal balances on Section 108 loans for which the State has pledged its CDBG funds as security.

The maximum repayment period for a Section 108 loan is twenty years. Repayment of the loan is possible through the following methods:

- Resale value of clean sites
- Tax increment financing (TIF) proceeds
- Interest earned on the loan drawdown prior to payout
- Cost recovery from the parties responsible for contamination
- EDI Grants

To date Section 108 Loan Guarantees have not yet been undertaken in the State of North Dakota.

### **EDI Grants**

EDI provides grants to local governments to enhance both the security of loans guaranteed through the Section 108 Loan Program and the feasibility of the economic development and revitalization projects they finance.

Because Section 108 loans represent a potential risk to local governments' Community Development Block Grant (CDBG) allocations which governments pledge against potential repayment shortfalls, the EDI program offers communities a way to decrease the level of risk to their CDBG funds. A local government may use an EDI grant to provide additional security for the Section 108 loan (as a loan-loss reserve or debt-service, for example), thereby reducing the exposure of its CDBG funds in the event of a default in loans made locally with the 108 funds. Or it may use this flexible grant to simply make the project more feasible by paying some of the project costs with grant funds or by reducing the interest rate to be paid from a revolving loan fund. Increasing access to capital for entrepreneurs and small business has emerged as a key component of the job growth strategy powered by the EDI grant program.

EDI grant funds can only be used in projects also assisted by the Section 108 Loan Program as identified above.

### **BEDI Grants**

BEDI is designed to assist cities with the redevelopment of abandoned, idled and underused industrial and commercial facilities with expansion and redevelopment of *real or perceived* environmental contamination. HUD emphasizes the use of BEDI and Section 108 Loan Guarantee funds to finance projects and activities that will provide near-term results and demonstrable economic benefits, such as job creation and increases in the local tax base. HUD does not encourage applications whose scope is limited only to site acquisition and/or remediation (i.e., land banking), where there is no immediately planned redevelopment. BEDI grants must be used in conjunction with a new Section 108 guaranteed loan commitment. However, there has been discussion to eliminate this requirement possibly for Year 2004, which would allow for greater eligibility for the BEDI Grants.

***Eligible activities*** include the following:

- Land write-downs

- Site remediation costs
- Funding reserves
- Over-collateralizing the Section 108 Loan
- Direct enhancement of the security of the Section 108 Loan
- Provisions of financing to for-profit businesses at a below market interest rate

These activities are eligible as long they meet one of the CDBG Program’s three national objectives:

- Benefit low and moderate income persons
- Prevent or eliminate slum or blight
- Address imminent threats and urgent needs

**Grant Amount.** In FY 2001 a total amount of \$25 million was available and a maximum BEDI grant amount was \$2 million per project with a minimum BEDI to Section 108 ratio of 1:1.

**U.S. EPA Brownfield Grants**

The U.S. EPA has several brownfield grants which could be utilized to help redevelop Downtown Mandan. These grants are highlighted in the table below.

Program	Eligible Activities	Available Funding	Required Match	Performance Period
Assessment Grant	Inventory, characterize, assess and conduct planning and community involvement	Maximum \$400,000 (\$200,000 for hazardous substance sites and \$200,000 for petroleum contaminated sites); waivers possible for maximum of \$700,000 (\$350,000 for hazardous substances and \$350,000 for petroleum)	none	2 years
Revolving Loan Fund Grants	Capitalize a revolving loan fund and provide subgrants for cleanup on sites contaminated by petroleum and hazardous substances, pollutants, or contaminants. At least 60% of funds capitalize a revolving loan fund. No more than 40% may be awarded as cleanup subgrants. The loan recipient can not subgrant to itself.	\$1million per eligible entity	20% cost share (contribution of money, labor, material or services)	5 years
Cleanup Grant	Cleanup activities	\$200,000 per site (maximum of 5 sites)	20% cost share (contribution of money, labor, material or services)	2 years

***Economic Development Tools Conclusions***

Large-scale redevelopment projects, such as Downtown Mandan, require a combination of funding tools from various levels of government. Due to the complexity and diversity of issues typically involved in redevelopment projects, such as environmental, transportation, infrastructure, land acquisition/assembly, building demolition/

rehabilitation, and business recruitment issues, a municipality needs a number of resources to tap to help address the varying aspects of the redevelopment project. However, locally controlled economic development tools cannot be stressed enough. From working with other municipalities across the country, we have found that the local funding tools have proved critical in the redevelopment process. This is because, local funding tools, such as TIF, property tax abatements, land acquisition/write-downs, empower municipalities to guide redevelopment and provide timely assistance, which is critical to today's development projects.

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## *Restrictions*

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Our study and report are based on assumptions and estimates that are subject to uncertainty and variation. These estimates are often based on data obtained in interviews with third parties, and such data are not always completely reliable. In addition, we make assumptions as to the future behavior of consumers and the general economy that are highly uncertain. Therefore, while our estimates have been conscientiously prepared on the basis of our experience and the data available to us, we make no warranty of any kind that the development or employment projected will, in fact be achieved.

URS Corporation shall have no obligation to update our findings and conclusions for changes in market conditions, which occur subsequent to our fieldwork. Any such changes in market conditions will affect the validity of our estimates.

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Mandan City	15,177	16,739	0.98%
Bismarck City	49,256	55,284	1.16%
Morton County	23,700	25,303	0.66%
Burleigh County	60,131	69,416	1.45%
North Dakota	638,800	642,200	0.05%

*Source: US Census Bureau and URS Corp.*

Table A.2  
Population by Race,  
City of Mandan vs Metro Area and State of North Dakota,  
1990 - 2000

	Mandan		Bismarck		Morton County		Burleigh County		North Dakota	
<b>1990</b>										
White	14,843	97.80%	47,682	96.80%	23,282	98.24%	58,216	96.82%	605,007	94.71%
Black	11	0.07%	70	0.14%	17	0.07%	70	0.12%	3,519	0.55%
American Indian, Eskimo, or Aleut	251	1.65%	1,062	2.16%	315	1.33%	1,383	2.30%	25,305	3.96%
Asian or Pacific Islander	64	0.42%	296	0.60%	69	0.29%	302	0.50%	3,184	0.50%
Other race	8	0.05%	146	0.30%	17	0.07%	160	0.27%	1,785	0.28%
<b>2000</b>										
White alone	15,881	94.87%	52,491	94.95%	24,243	95.81%	66,043	95.14%	593,785	92.46%
Black or African American alone	63	0.38%	172	0.31%	65	0.26%	204	0.29%	3,673	0.57%
American Indian and Alaska Native alone	499	2.98%	1,717	3.11%	587	2.32%	2,079	2.99%	31,308	4.88%
Asian alone	14	0.08%	259	0.47%	30	0.12%	279	0.40%	3,342	0.52%
Native Hawaiian and Other Pacific Islander alone	0	0.00%	0	0.00%	17	0.07%	0	0.00%	187	0.03%
Some other race alone	50	0.30%	218	0.39%	73	0.29%	266	0.38%	2,360	0.37%
Two or more races	232	1.39%	427	0.77%	288	1.14%	545	0.79%	7,545	1.17%
<b>Change, 1990 - 2000</b>		Percent		Percent		Percent		Percent		Percent
White	1,038	7%	4,809	10%	961	4%	7,827	13%	-11,222	-2%
Black	52	473%	102	146%	48	282%	134	191%	154	4%
American Indian, Eskimo, or Aleut	248	99%	655	62%	272	86%	696	50%	6,003	24%
Asian or Pacific Islander	-50	-78%	-37	-13%	-22	-32%	-23	-8%	345	11%
Other race	42	525%	72	49%	56	329%	106	66%	575	32%

Source: US Census Bureau and URS Corp.

Table A.3 Average Annual Population Growth Rates by Age Group, City of Mandan vs Metro Area and State of North Dakota, 1990 - 2000						
	1990		2000		Average Annual	
	Number	% of Population	Number	% of Population	Growth	Percentage Change
<b>Mandan</b>						
0-4 years	1,178	7.76%	1,139	6.80%	(4)	-0.34%
5-17	3,548	23.38%	3,407	20.35%	(16)	-0.40%
18-24	1,183	7.79%	1,416	8.46%	26	1.81%
25-44	5,010	33.01%	5,107	30.51%	11	0.19%
45-64	2,477	16.32%	3,490	20.85%	113	3.49%
65+	1,781	11.73%	2,180	13.02%	44	2.04%
<b>Bismarck</b>						
0-4 years	3,578	7.26%	3,185	5.76%	(44)	-1.16%
5-17	9,711	19.72%	9,765	17.66%	6	0.06%
18-24	4,800	9.75%	6,201	11.22%	156	2.59%
25-44	16,817	34.14%	15,858	28.68%	(107)	-0.59%
45-64	8,727	17.72%	12,638	22.86%	435	3.77%
65+	5,623	11.42%	7,637	13.81%	224	3.11%
<b>Morton County</b>						
0-4 years	1,711	7.22%	1,621	6.41%	(10)	-0.54%
5-17	5,545	23.40%	5,217	20.62%	(36)	-0.61%
18-24	1,681	7.09%	1,945	7.69%	29	1.47%
25-44	7,333	30.94%	7,145	28.24%	(21)	-0.26%
45-64	4,241	17.89%	5,659	22.36%	158	2.93%
65+	3,189	13.46%	3,716	14.69%	59	1.54%
<b>Burleigh County</b>						
0-4 years	4,467	7.43%	4,311	6.21%	(17)	-0.35%
5-17	12,286	20.43%	12,898	18.58%	68	0.49%
18-24	5,915	9.84%	7,571	10.91%	184	2.50%
25-44	20,425	33.97%	20,287	29.23%	(15)	-0.07%
45-64	10,625	17.67%	15,648	22.54%	558	3.95%
65+	6,413	10.67%	8,701	12.53%	254	3.10%
<b>North Dakota</b>						
0-4 years	47,961	7.51%	39,094	6.09%	(985)	-2.02%
5-17	127,720	19.99%	121,805	18.97%	(657)	-0.47%
18-24	66,569	10.42%	72,716	11.32%	683	0.89%
25-44	195,922	30.67%	175,257	27.29%	(2,296)	-1.11%
45-64	109,639	17.16%	138,731	21.60%	3,232	2.38%
65+	90,989	14.24%	94,597	14.73%	401	0.39%

Source: US Census Bureau and URS Corp.

Table A.4  
 Educational Attainment,  
 City of Mandan vs Metro Area and State of North Dakota,  
 1990 - 2000

	City of Mandan		City of Bismarck		Morton County		Burleigh County		North Dakota	
	1990	2000	1990	2000	1990	2000	1990	2000	1990	2000
Less than 9th Grade	10.9%	10.2%	6.8%	7.1%	13.1%	11.8%	6.9%	6.8%	9.3%	8.7%
High School Graduates	18.2%	30.4%	15.3%	23.2%	18.5%	31.9%	15.8%	23.7%	17.4%	27.9%
Some College / Associate	17.6%	33.0%	20.8%	34.8%	16.7%	31.2%	20.2%	35.5%	19.0%	34.0%
Bachelor Degree	6.8%	15.2%	11.9%	21.7%	6.3%	13.6%	11.1%	21.4%	8.4%	16.5%
Graduate or Professional Degree	2.9%	3.9%	4.8%	7.7%	2.3%	3.4%	4.5%	7.3%	2.8%	5.5%

Source: US Census Bureau and URS Corp.

Table A.5  
Per Capita Income Comparison  
United States, Plains Region, State of North Dakota, Bismarck MSA, Morton and Burleigh Counties, ND,  
1990 - 2000

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	Average Annual Percentage Change
												1990 - 2000
Morton County	\$13,686	\$14,325	\$15,447	\$16,015	\$16,304	\$16,586	\$17,689	\$18,124	\$19,551	\$19,893	\$21,747	4.74%
Burleigh County	\$17,718	\$18,312	\$19,547	\$20,341	\$21,084	\$21,767	\$22,684	\$23,390	\$24,939	\$25,648	\$26,985	4.30%
Bismarck MSA	\$16,582	\$17,207	\$18,424	\$19,154	\$19,777	\$20,350	\$21,330	\$21,971	\$23,487	\$24,107	\$25,586	4.43%
North Dakota	\$15,872	\$16,230	\$17,614	\$17,719	\$18,885	\$18,899	\$20,921	\$20,520	\$22,716	\$22,969	\$24,708	4.53%
Plains Region <sup>1</sup>	\$18,208	\$18,794	\$19,838	\$20,258	\$21,381	\$22,138	\$23,520	\$24,517	\$26,001	\$26,769	\$28,228	4.48%
United States	\$19,572	\$20,023	\$20,960	\$21,539	\$22,340	\$23,255	\$24,270	\$25,412	\$26,893	\$27,843	\$29,469	4.18%

Notes: 1 Plains region includes Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota and South Dakota

Source: Bureau of Economic Analysis and URS Corp.

Table A.6  
Select Housing Characteristics,  
City of Mandan vs. Metro Area and State of North Dakota,  
1990 - 2000

	Mandan City		Bismarck City		Morton County		Burleigh County		North Dakota	
	1990	2000	1990	2000	1990	2000	1990	2000	1990	2000
Occupied Housing Units	5,608	6,634	19,315	23,143	8,677	9,889	22,684	27,670	240,878	257,152
Owner Occupied	3,787	4,667	11,729	14,656	6,346	7,472	14,704	18,822	157,950	171,310
<i>Percentage</i>	68%	70%	61%	63%	73%	76%	65%	68%	66%	67%
Renter Occupied	1,821	1,967	7,586	8,487	2,331	2,417	7,980	8,848	82,928	85,842
<i>Percentage</i>	32%	30%	39%	37%	27%	24%	35%	32%	34%	33%
Average Household Size	2.7	2.5	2.6	2.4	2.7	2.6	2.7	2.5	2.7	2.5
Owner Occupied Units										
1 Unit Detached	2,725	3,423	8,597	10,263	4,890	5,825	10,995	14,006	130,867	141,304
<i>Percentage</i>	72%	73%	73%	70%	77%	78%	75%	74%	83%	82%
1 Unit Attached	113	175	814	1,044	122	196	849	1,101	4,171	6,587
<i>Percentage</i>	3%	4%	7%	7%	2%	3%	6%	6%	3%	4%
2 Units	63	62	292	294	83	66	296	294	1,479	1,133
<i>Percentage</i>	2%	1%	2%	2%	1%	1%	2%	2%	1%	1%
3-4 Units	10	11	76	199	10	13	76	205	701	991
<i>Percentage</i>	0%	0%	1%	1%	0%	0%	1%	1%	0%	1%
5-9 Units	16	24	102	154	17	28	102	154	773	1,044
<i>Percentage</i>	0%	1%	1%	1%	0%	0%	1%	1%	0%	1%
10-49 Units	3	15	218	416	3	18	218	424	1,031	1,520
<i>Percentage</i>	0%	0%	2%	3%	0%	0%	1%	2%	1%	1%
50+ Units	0	0	7	98	0	0	7	98	87	235
<i>Percentage</i>	0%	0%	0%	1%	0%	0%	0%	1%	0%	0%
Other	857	957	1,623	2,188	1,221	1,326	2,161	2,540	18,841	18,496
<i>Percentage</i>	23%	21%	14%	15%	19%	18%	15%	13%	12%	11%
Renter Occupied Units										
1 Unit Detached	292	324	719	909	625	581	983	1,139	20,991	19,642
<i>Percentage</i>	16%	16%	9%	11%	27%	24%	12%	13%	25%	23%
1 Unit Attached	73	47	406	260	79	55	429	295	5,445	4,109
<i>Percentage</i>	4%	2%	5%	3%	3%	2%	5%	3%	7%	5%
2 Units	223	236	988	875	238	246	1,012	879	6,041	5,167
<i>Percentage</i>	12%	12%	13%	10%	10%	10%	13%	10%	7%	6%
3-4 Units	275	299	861	717	287	314	862	717	10,210	10,021
<i>Percentage</i>	15%	15%	11%	8%	12%	13%	11%	8%	12%	12%
5-9 Units	385	450	1,354	1,492	436	502	1,361	1,510	9,839	9,615
<i>Percentage</i>	21%	23%	18%	18%	19%	21%	17%	17%	12%	11%
10-49 Units	282	302	2,464	3,162	316	342	2,465	3,172	23,701	28,705
<i>Percentage</i>	15%	15%	32%	37%	14%	14%	31%	36%	29%	33%
50+ Units	0	22	413	762	0	22	413	765	2,640	5,682
<i>Percentage</i>	0%	1%	5%	9%	0%	1%	5%	9%	3%	7%
Other	291	287	381	310	350	355	455	371	4,061	2,901
<i>Percentage</i>	16%	15%	5%	4%	15%	15%	6%	4%	5%	3%
Household Size										
1 Person Household	1,326	1,716	5,321	7,161	2,049	2,534	5,763	7,787	63,953	75,392
<i>Percentage</i>	24%	26%	28%	31%	24%	26%	25%	28%	27%	29%
2 Person Household	1,704	2,280	6,259	8,197	2,720	3,420	7,287	9,618	78,445	89,423
<i>Percentage</i>	30%	34%	32%	35%	31%	35%	32%	35%	33%	35%
3-4 Person Household	1,942	2,039	6,054	6,223	2,850	3,003	7,413	8,105	73,000	70,399
<i>Percentage</i>	35%	31%	31%	27%	33%	30%	33%	29%	30%	27%
5+ Person Household	636	599	1,681	1,562	1,058	932	2,221	2,160	25,480	21,938
<i>Percentage</i>	11%	9%	9%	7%	12%	9%	10%	8%	11%	9%
Age of Householder										
15 to 34 years	1,615	1,511	6,164	5,871	2,168	1,883	7,028	6,788	69,907	60,738
<i>Percentage</i>	29%	23%	32%	25%	25%	19%	31%	24%	29%	24%
35 to 44 years	1,338	1,616	4,455	4,804	1,954	2,319	5,427	6,203	49,930	54,152
<i>Percentage</i>	24%	24%	23%	21%	23%	23%	24%	22%	21%	21%
45 to 54 years	731	1,382	2,681	4,636	1,206	2,167	3,296	5,718	31,428	49,541
<i>Percentage</i>	13%	21%	14%	20%	14%	22%	15%	21%	13%	19%
55 to 64 years	739	739	2,390	2,889	1,261	1,159	2,831	3,460	30,572	31,464
<i>Percentage</i>	13%	11%	12%	12%	15%	12%	12%	12%	13%	12%
65 + years	1,185	1,389	3,625	4,963	2,088	2,355	4,102	5,568	59,041	61,339
<i>Percentage</i>	21%	21%	19%	21%	24%	24%	18%	20%	25%	24%

Table A.7  
Select Housing Characteristics,  
City of Mandan vs. City of Bismarck, ND,  
1990 - 2000

	City of Mandan				City of Bismarck			
	1990	2000	Change	Average Annual Percent Change	1990	2000	Change	Average Annual Percent Change
Occupied Housing Units	5,608	6,634	1,026	1.7%	19,315	23,143	3,828	1.8%
Owner Occupied	3,787	4,667	880	2.1%	11,729	14,656	2,927	2.3%
<i>Percentage</i>	68%	70%			61%	63%		
Renter Occupied	1,821	1,967	146	0.8%	7,586	8,487	901	1.1%
<i>Percentage</i>	32%	30%			39%	37%		
Average Household Size	2.7	2.5	0	-0.7%	2.6	2.4	0	-0.7%
Owner Occupied Units								
1 Unit Detached	2,725	3,423	698	2.3%	8,597	10,263	1,666	1.8%
<i>Percentage</i>	72.0%	73.3%			73.3%	70.0%		
1 Unit Attached	113	175	62	4.5%	814	1,044	230	2.5%
<i>Percentage</i>	3.0%	3.7%			6.9%	7.1%		
2 Units	63	62	-1	-0.2%	292	294	2	0.1%
<i>Percentage</i>	1.7%	1.3%			2.5%	2.0%		
3-4 Units	10	11	1	1.0%	76	199	123	10.1%
<i>Percentage</i>	0.3%	0.2%			0.6%	1.4%		
5-9 Units	16	24	8	4.1%	102	154	52	4.2%
<i>Percentage</i>	0.4%	0.5%			0.9%	1.1%		
10-49 Units	3	15	12	17.5%	218	416	198	6.7%
<i>Percentage</i>	0.1%	0.3%			1.9%	2.8%		
50+ Units	0	0	0	na	7	98	91	30.2%
<i>Percentage</i>	0.0%	0.0%			0.1%	0.7%		
Other	857	957	100	1.1%	1,623	2,188	565	3.0%
<i>Percentage</i>	22.6%	20.5%			13.8%	14.9%		
Renter Occupied Units								
1 Unit Detached	292	324	32	1.0%	719	909	190	2.4%
<i>Percentage</i>	16.0%	16.5%			9.5%	10.7%		
1 Unit Attached	73	47	-26	-4.3%	406	260	-146	-4.4%
<i>Percentage</i>	4.0%	2.4%			5.4%	3.1%		
2 Units	223	236	13	0.6%	988	875	-113	-1.2%
<i>Percentage</i>	12.2%	12.0%			13.0%	10.3%		
3-4 Units	275	299	24	0.8%	861	717	-144	-1.8%
<i>Percentage</i>	15.1%	15.2%			11.3%	8.4%		
5-9 Units	385	450	65	1.6%	1,354	1,492	138	1.0%
<i>Percentage</i>	21.1%	22.9%			17.8%	17.6%		
10-49 Units	282	302	20	0.7%	2,464	3,162	698	2.5%
<i>Percentage</i>	15.5%	15.4%			32.5%	37.3%		
50+ Units	0	22	22	na	413	762	349	6.3%
<i>Percentage</i>	0.0%	1.1%			5.4%	9.0%		
Other	291	287	-4	-0.1%	381	310	-71	-2.0%
<i>Percentage</i>	16.0%	14.6%			5.0%	3.7%		
Household Size of Occupied Units								
1 Person Household	1,326	1,716	390	2.6%	5,321	7,161	1,840	3.0%
<i>Percentage</i>	24%	26%			28%	31%		
2 Person Household	1,704	2,280	576	3.0%	6,259	8,197	1,938	2.7%
<i>Percentage</i>	30%	34%			32%	35%		
3-4 Person Household	1,942	2,039	97	0.5%	6,054	6,223	169	0.3%
<i>Percentage</i>	35%	31%			31%	27%		
5+ Person Household	636	599	-37	-0.6%	1,681	1,562	-119	-0.7%
<i>Percentage</i>	11%	9%			9%	7%		
Age of Householder of Occupied Units								
15 to 34 years	1,615	1,511	-104	-0.7%	6,164	5,871	-293	-0.5%
<i>Percentage</i>	29%	23%			32%	25%		
35 to 44 years	1,338	1,616	278	1.9%	4,455	4,804	349	0.8%
<i>Percentage</i>	24%	24%			23%	21%		
45 to 54 years	731	1,382	651	6.6%	2,681	4,636	1,955	5.6%
<i>Percentage</i>	13%	21%			14%	20%		
55 to 64 years	739	739	0	0.0%	2,390	2,889	499	1.9%
<i>Percentage</i>	13%	11%			12%	12%		
65 + years	1,185	1,389	204	1.6%	3,625	4,963	1,338	3.2%
<i>Percentage</i>	21%	21%			19%	21%		

Source: US Census and URS Corporation

**Table A.8**  
**Number of Occupied Housing Units by Owner and Renter Occupied,**  
**City of Mandan vs Metro Area and State of North Dakota,**  
**1990 - 2000**

Type of Housing Structure	Mandan City		Bismarck City		Morton County		Burleigh County		North Dakota	
	1990	2000	1990	2000	1990	2000	1990	2000	1990	2000
Owner occupied:	3,787	4,667	11,729	14,656	6,346	7,472	14,704	18,822	157,950	171,310
1unit, detached	2,725	3,423	8,597	10,263	4,890	5,825	10,995	14,006	130,867	141,304
1unit, attached	113	175	814	1,044	122	196	849	1,101	4,171	6,587
2 units	63	62	292	294	83	66	296	294	1,479	1,133
3 or 4 units	10	11	76	199	10	13	76	205	701	991
5 to 9 units	16	24	102	154	17	28	102	154	773	1,044
10 to 19 units	3	15	166	302	3	18	166	302	672	892
20 to 49 units	0	0	52	114	0	0	52	122	359	628
50 + units	0	0	7	98	0	0	7	98	87	235
Mobile home	835	957	1,544	2,188	1,189	1,326	2,076	2,540	18,045	18,469
Other	22	0	79	0	32	0	85	0	796	27
Renter occupied:	1,821	1,967	7,586	8,487	2,331	2,417	7,980	8,848	82,928	85,842
1unit, detached	292	324	719	909	625	581	983	1,139	20,991	19,642
1unit, attached	73	47	406	260	79	55	429	295	5,445	4,109
2 units	223	236	988	875	238	246	1,012	879	6,041	5,167
3 or 4 units	275	299	861	717	287	314	862	717	10,210	10,021
5 to 9 units	385	450	1,354	1,492	436	502	1,361	1,510	9,839	9,615
10 to 19 units	210	234	1,549	1,500	244	272	1,550	1,510	12,382	12,907
20 to 49 units	72	68	915	1,662	72	70	915	1,662	11,319	15,798
50 + units	0	22	413	762	0	22	413	765	2,640	5,682
Mobile home	229	287	259	310	281	355	328	371	2,945	2,895
Other	62	0	122	0	69	0	127	0	1,116	6
<b>Total</b>	<b>5,608</b>	<b>6,634</b>	<b>19,315</b>	<b>23,143</b>	<b>8,677</b>	<b>9,889</b>	<b>22,684</b>	<b>27,670</b>	<b>240,878</b>	<b>257,152</b>

Source: US Census Bureau and URS Corp.

**Table A.9**  
**Average Household Size by Number of Occupied Housing Units by Owner and Renter Occupied,**  
**City of Mandan vs Metro Area and State of North Dakota,**  
**1990 - 2000**

Type of Housing Structure	Mandan City		Bismarck City		Morton County		Burleigh County		North Dakota	
	1990	2000	1990	2000	1990	2000	1990	2000	1990	2000
Owner occupied:	2.92	2.68	2.84	2.65	2.85	2.66	2.88	2.73	2.74	2.61
1unit, detached	2.99	2.79	3.02	2.91	2.89	2.72	3.04	2.94	2.80	2.68
1unit, attached	2.71	2.47	2.28	1.85	2.73	2.40	2.32	1.85	2.27	2.01
2 units	2.43	1.79	2.22	2.08	2.33	1.85	2.23	2.08	2.21	2.06
3 or 4 units	1.50	1.64	1.70	1.93	1.50	1.54	1.70	2.01	1.82	1.91
5 to 9 units	1.63	2.08	1.62	1.45	1.65	2.00	1.62	1.45	1.68	1.58
10 to 19 units	2.33	0.93	1.52	1.40	2.33	1.11	1.52	1.40	1.56	1.34
20 to 49 units	na	na	1.50	1.50	na	na	1.50	1.67	1.61	1.51
50 + units	na	na	1.43	1.34	na	na	1.43	1.34	1.45	1.28
Mobile home	2.80	2.47	2.59	2.32	2.80	2.56	2.61	2.39	2.70	2.51
Other	1.68	na	2.01	na	1.75	na	2.04	na	2.20	2.04
Renter occupied:	2.18	2.03	1.94	1.74	2.23	2.03	2.00	1.76	2.18	2.00
1unit, detached	2.97	2.44	3.09	2.78	2.92	2.43	3.13	2.72	2.96	2.68
1unit, attached	2.86	2.15	2.64	2.27	2.82	2.25	2.69	2.31	3.06	2.78
2 units	2.28	1.79	2.19	1.86	2.24	1.76	2.21	1.87	2.23	2.04
3 or 4 units	1.72	1.56	1.59	1.52	1.70	1.56	1.59	1.52	1.77	1.78
5 to 9 units	1.76	1.74	1.73	1.59	1.68	1.68	1.73	1.58	1.72	1.66
10 to 19 units	1.83	1.77	1.64	1.50	1.73	1.68	1.64	1.50	1.72	1.64
20 to 49 units	1.24	1.25	1.79	1.53	1.24	1.24	1.79	1.53	1.71	1.67
50 + units	na	1.05	1.37	1.44	na	1.05	1.37	1.44	1.42	1.44
Mobile home	2.79	3.17	2.33	2.08	2.70	2.95	2.42	2.05	2.54	2.54
Other	1.87	na	1.71	na	1.81	na	1.72	na	1.81	2.17
Total	2.68	2.49	2.48	2.31	2.68	2.51	2.57	2.42	2.55	2.41

Source: US Census Bureau and URS Corp.

**Table A.10**  
**Percentage of Population by Number of Units per Structure,**  
**City of Mandan vs Metro Area and State of North Dakota,**  
**1990 - 2000**

Type of Housing Structure	Mandan City		Bismarck City		Morton County		Burleigh County		North Dakota	
	1990	2000	1990	2000	1990	2000	1990	2000	1990	2000
Owner occupied:	73.6%	75.8%	69.3%	72.5%	77.7%	80.2%	72.6%	76.7%	70.5%	72.3%
1unit, detached	54.4%	57.8%	54.1%	55.7%	60.7%	63.8%	57.4%	61.6%	59.6%	61.3%
1unit, attached	2.0%	2.6%	3.9%	3.6%	1.4%	1.9%	3.4%	3.1%	1.5%	2.1%
2 units	1.0%	0.7%	1.4%	1.1%	0.8%	0.5%	1.1%	0.9%	0.5%	0.4%
3 or 4 units	0.1%	0.1%	0.3%	0.7%	0.1%	0.1%	0.2%	0.6%	0.2%	0.3%
5 to 9 units	0.2%	0.3%	0.3%	0.4%	0.1%	0.2%	0.3%	0.3%	0.2%	0.3%
10 to 19 units	0.0%	0.1%	0.5%	0.8%	0.0%	0.1%	0.4%	0.6%	0.2%	0.2%
20 to 49 units	0.0%	0.0%	0.2%	0.3%	0.0%	0.0%	0.1%	0.3%	0.1%	0.2%
50 + units	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%
Mobile home	15.6%	14.3%	8.3%	9.5%	14.3%	13.7%	9.3%	9.1%	7.9%	7.5%
Other	0.2%	0.0%	0.3%	0.0%	0.2%	0.0%	0.3%	0.0%	0.3%	0.0%
Renter occupied:	26.4%	24.2%	30.7%	27.5%	22.3%	19.8%	27.4%	23.3%	29.5%	27.7%
1unit, detached	5.8%	4.8%	4.6%	4.7%	7.8%	5.7%	5.3%	4.6%	10.1%	8.5%
1unit, attached	1.4%	0.6%	2.2%	1.1%	1.0%	0.5%	2.0%	1.0%	2.7%	1.8%
2 units	3.4%	2.6%	4.5%	3.0%	2.3%	1.7%	3.8%	2.5%	2.2%	1.7%
3 or 4 units	3.1%	2.8%	2.9%	2.0%	2.1%	2.0%	2.4%	1.6%	2.9%	2.9%
5 to 9 units	4.5%	4.8%	4.9%	4.4%	3.1%	3.4%	4.0%	3.6%	2.8%	2.6%
10 to 19 units	2.6%	2.5%	5.3%	4.2%	1.8%	1.8%	4.4%	3.4%	3.5%	3.4%
20 to 49 units	0.6%	0.5%	3.4%	4.7%	0.4%	0.4%	2.8%	3.8%	3.2%	4.3%
50 + units	0.0%	0.1%	1.2%	2.0%	0.0%	0.1%	1.0%	1.6%	0.6%	1.3%
Mobile home	4.3%	5.5%	1.3%	1.2%	3.3%	4.2%	1.4%	1.1%	1.2%	1.2%
Other	0.8%	0.0%	0.4%	0.0%	0.5%	0.0%	0.4%	0.0%	0.3%	0.0%

Source: US Census Bureau and URS Corp.

**Table A.11**  
**Percentage of Housing Units by Number of Units per Structure,**  
**City of Mandan vs Metro Area and State of North Dakota,**  
**1990 - 2000**

Type of Housing Structure	Mandan City		Bismarck City		Morton County		Burleigh County		North Dakota	
	1990	2000	1990	2000	1990	2000	1990	2000	1990	2000
Owner occupied:	67.5%	70.3%	60.7%	63.3%	73.1%	75.6%	64.8%	68.0%	65.6%	66.6%
1unit, detached	48.6%	51.6%	44.5%	44.3%	56.4%	58.9%	48.5%	50.6%	54.3%	54.9%
1unit, attached	2.0%	2.6%	4.2%	4.5%	1.4%	2.0%	3.7%	4.0%	1.7%	2.6%
2 units	1.1%	0.9%	1.5%	1.3%	1.0%	0.7%	1.3%	1.1%	0.6%	0.4%
3 or 4 units	0.2%	0.2%	0.4%	0.9%	0.1%	0.1%	0.3%	0.7%	0.3%	0.4%
5 to 9 units	0.3%	0.4%	0.5%	0.7%	0.2%	0.3%	0.4%	0.6%	0.3%	0.4%
10 to 19 units	0.1%	0.2%	0.9%	1.3%	0.0%	0.2%	0.7%	1.1%	0.3%	0.3%
20 to 49 units	0.0%	0.0%	0.3%	0.5%	0.0%	0.0%	0.2%	0.4%	0.1%	0.2%
50 + units	0.0%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.4%	0.0%	0.1%
Mobile home	14.9%	14.4%	8.0%	9.5%	13.7%	13.4%	9.2%	9.2%	7.5%	7.2%
Other	0.4%	0.0%	0.4%	0.0%	0.4%	0.0%	0.4%	0.0%	0.3%	0.0%
Renter occupied:	32.5%	29.7%	39.3%	36.7%	26.9%	24.4%	35.2%	32.0%	34.4%	33.4%
1unit, detached	5.2%	4.9%	3.7%	3.9%	7.2%	5.9%	4.3%	4.1%	8.7%	7.6%
1unit, attached	1.3%	0.7%	2.1%	1.1%	0.9%	0.6%	1.9%	1.1%	2.3%	1.6%
2 units	4.0%	3.6%	5.1%	3.8%	2.7%	2.5%	4.5%	3.2%	2.5%	2.0%
3 or 4 units	4.9%	4.5%	4.5%	3.1%	3.3%	3.2%	3.8%	2.6%	4.2%	3.9%
5 to 9 units	6.9%	6.8%	7.0%	6.4%	5.0%	5.1%	6.0%	5.5%	4.1%	3.7%
10 to 19 units	3.7%	3.5%	8.0%	6.5%	2.8%	2.8%	6.8%	5.5%	5.1%	5.0%
20 to 49 units	1.3%	1.0%	4.7%	7.2%	0.8%	0.7%	4.0%	6.0%	4.7%	6.1%
50 + units	0.0%	0.3%	2.1%	3.3%	0.0%	0.2%	1.8%	2.8%	1.1%	2.2%
Mobile home	4.1%	4.3%	1.3%	1.3%	3.2%	3.6%	1.4%	1.3%	1.2%	1.1%
Other	1.1%	0.0%	0.6%	0.0%	0.8%	0.0%	0.6%	0.0%	0.5%	0.0%

Source: US Census Bureau and URS Corp.

Table A.12.a Migration, Burleigh County, ND, 1997 - 1998									
County	State	Inflow	Out Flow	Net Migration	County	State	Inflow	Out Flow	Net Migration
<b>North Dakota</b>					<b>Midwest</b>				
Ward County	ND	193	113	80	Dakota County	MN	0	24	(24)
Grand Forks County	ND	155	81	74	Pennington County	SD	21	45	(24)
Mountrail County	ND	40	0	40	Minnehaha County	SD	0	27	(27)
Stark County	ND	89	51	38	Hennepin County	MN	31	93	(62)
Grant County	ND	33	0	33	Other Flows - Midwest		538	533	5
Dunn County	ND	28	0	28	<b>Total Midwest</b>		<b>590</b>	<b>722</b>	<b>(132)</b>
Kidder County	ND	48	20	28	<b>West</b>				
Mercer County	ND	69	42	27	Clark County	NV	25	0	25
Williams County	ND	49	22	27	Yellowstone County	MT	32	25	7
Bottineau County	ND	26	0	26	Maricopa County	AZ	38	49	(11)
Emmons County	ND	50	25	25	San Diego County	CA	0	11	(11)
Logan County	ND	24	0	24	Boulder County	CO	0	12	(12)
Stutsman County	ND	82	58	24	Larimer County	CO	0	16	(16)
Mchenry County	ND	22	0	22	Arapahoe County	CO	0	18	(18)
Ramsey County	ND	39	18	21	King County	WA	0	19	(19)
Hettinger County	ND	20	0	20	El Paso County	CO	0	35	(35)
Mclean County	ND	120	100	20	Other Flows - West		312	380	(68)
Mckenzie County	ND	17	0	17	<b>Total West</b>		<b>407</b>	<b>565</b>	<b>(158)</b>
Sheridan County	ND	16	0	16	<b>Foreign</b>				
Foster County	ND	15	0	15			<b>16</b>	<b>15</b>	<b>1</b>
Rolette County	ND	33	22	11	<b>Other</b>				
Sioux County	ND	50	40	10	Other Flows - Northeast		31	39	(8)
Oliver County	ND	20	21	(1)	Other Flows - Different State		984	1,183	(199)
Richland County	ND	15	17	(2)	Other Flows - South		103	231	(128)
Barnes County	ND	0	21	(21)	<b>Total Other</b>		<b>1,118</b>	<b>1,453</b>	<b>(335)</b>
Cass County	ND	217	278	(61)	<b>Total</b>				
Morton County	ND	605	690	(85)			<b>4,407</b>	<b>4,563</b>	<b>(156)</b>
Other Flows - Same State	SS	201	189	12					
<b>Total North Dakota</b>		<b>2,276</b>	<b>1,808</b>	<b>468</b>					

Source: Internal Revenue Service and URS

Table A.12.b Migration, Morton County, ND, 1997 - 1998				
County	State	Inflow	Out Flow	Net Migration
<b>North Dakota</b>				
Burleigh County	ND	690	605	85
Sioux County	ND	25		25
Stark County	ND	55	31	24
Grant County	ND	23		23
Stutsman County	ND	21		21
Ward County	ND	39	27	12
Mclean County	ND	33	28	5
Grand Forks County	ND	26	24	2
Mercer County	ND		21	(21)
Cass County	ND	38	84	(46)
Other Flows - Same State	SS	184	138	46
<b>Total North Dakota</b>		<b>1,134</b>	<b>958</b>	<b>176</b>
<b>Other</b>				
Hennepin County	MN	13	15	(2)
Other Flows - Different State		369	435	(66)
<b>Total Other</b>		<b>382</b>	<b>450</b>	<b>(68)</b>
<b>Total</b>		<b>1,516</b>	<b>1,408</b>	<b>108</b>

Source: Internal Revenue Service and URS

Table A.13.a  
Migration,  
Burleigh County, ND,  
1998 - 1999

County	State	Inflow	Out Flow	Net Migration	County	State	Inflow	Out Flow	Net Migration
<b>North Dakota</b>					<b>Midwest</b>				
Stark County	ND	145	45	100	Walworth County	SD	28	0	28
Ward County	ND	171	99	72	Pennington County	SD	42	24	18
Mercer County	ND	107	46	61	Corson County	SD	16	0	16
Kidder County	ND	41	0	41	Clay County	MN	18	28	(10)
McLean County	ND	113	73	40	Cook County	IL	0	14	(14)
Morton County	ND	681	647	34	Minnehaha County	SD	26	43	(17)
Barnes County	ND	33	0	33	Ramsey County	MN	0	25	(25)
Richland County	ND	30	0	30	Washington County	MN	0	26	(26)
Grand Forks County	ND	102	75	27	Anoka County	MN	0	29	(29)
Grant County	ND	25	0	25	Dakota County	MN	0	29	(29)
Pierce County	ND	24	0	24	Hennepin County	MN	41	74	(33)
McIntosh County	ND	23	0	23	Other Flows - Midwest		479	626	(147)
Mckenzie County	ND	22	0	22	<b>Total Midwest</b>		<b>650</b>	<b>918</b>	<b>(268)</b>
Williams County	ND	43	21	22	<b>West</b>				
Bottineau County	ND	19	0	19	Dawson County	MT	29	0	29
Wells County	ND	19	0	19	Yellowstone County	MT	23	18	5
Emmons County	ND	53	37	16	Pima County	AZ	0	13	(13)
Mchenry County	ND	15	0	15	Ada County	ID	0	18	(18)
Ramsey County	ND	48	33	15	Los Angeles County	CA	0	20	(20)
Hettinger County	ND	13	0	13	Gallatin County	MT	0	26	(26)
Sioux County	ND	42	38	4	Clark County	NV	0	31	(31)
Mountrail County	ND	13	15	(2)	Maricopa County	AZ	15	61	(46)
Stutsman County	ND	67	69	(2)	Other Flows - West		422	449	(27)
Rolette County	ND	27	38	(11)	<b>Total West</b>		<b>489</b>	<b>636</b>	<b>(147)</b>
Oliver County	ND	0	17	(17)	<b>Foreign</b>				
Ransom County	ND	0	23	(23)			<b>13</b>	<b>23</b>	<b>(10)</b>
Cass County	ND	195	309	(114)	<b>Other</b>				
Other Flows - Same State	SS	180	205	(25)	Other Flows - Northeast		61	37	24
<b>Total North Dakota</b>		<b>2,251</b>	<b>1,790</b>	<b>461</b>	Other Flows - Different State		1,090	1,298	(208)
					Other Flows - South		128	186	(58)
					<b>Total Other</b>		<b>1,279</b>	<b>1,521</b>	<b>(242)</b>
					<b>Total</b>		<b>4,682</b>	<b>4,888</b>	<b>(206)</b>

Source: Internal Revenue Service and URS

Table A.13.b  
Migration,  
Morton County, ND,  
1998 - 1999

County	State	Inflow	Out Flow	Net Migration
<b>North Dakota</b>				
Mercer County	ND	31	0	31
Grant County	ND	27	0	27
Sioux County	ND	25	0	25
Grand Forks County	ND	21	0	21
Ward County	ND	43	29	14
Stark County	ND	45	39	6
Cass County	ND	48	60	(12)
Burleigh County	ND	647	681	(34)
Other Flows - Same State	SS	212	181	31
<b>Total North Dakota</b>		<b>1,099</b>	<b>990</b>	<b>109</b>
<b>Other</b>				
Hennepin County	MN	0	23	(23)
Other Flows - Different State		321	493	(172)
<b>Total Other</b>		<b>321</b>	<b>516</b>	<b>(195)</b>
<b>Total</b>		<b>1,420</b>	<b>1,506</b>	<b>(86)</b>

Source: Internal Revenue Service and URS

Table A.14.a  
Migration,  
Burleigh County, ND,  
1999 - 2000

County	State	Inflow	Out Flow	Net Migration	County	State	Inflow	Out Flow	Net Migration
<b>North Dakota</b>					<b>Midwest</b>				
Stark County	ND	165	40	125	Brown County	SD	27	0	27
Ward County	ND	169	54	115	Pennington County	SD	33	27	6
Williams County	ND	68	17	51	Minnehaha County	SD	23	28	(5)
Mountrail County	ND	43	0	43	Stearns County	MN	0	17	(17)
Mercer County	ND	67	26	41	Lawrence County	SD	0	22	(22)
Mclean County	ND	109	75	34	Macomb County	MI	0	33	(33)
Rolette County	ND	33	0	33	Anoka County	MN	0	39	(39)
Grand Forks County	ND	114	82	32	Dakota County	MN	0	56	(56)
Mckenzie County	ND	28	0	28	Hennepin County	MN	28	118	(90)
Wells County	ND	25	0	25	Other Flows - Midwest		489	656	(167)
Mcintosh County	ND	22	0	22	<b>Total Midwest</b>		<b>600</b>	<b>996</b>	<b>(396)</b>
Bowman County	ND	20	0	20	<b>West</b>				
Stutsman County	ND	57	37	20	Dawson County	MT	23	0	23
Kidder County	ND	43	24	19	King County	WA	13	16	(3)
Bottineau County	ND	18	0	18	Gallatin County	MT	0	14	(14)
Emmons County	ND	38	21	17	Maricopa County	AZ	38	54	(16)
Mchenry County	ND	17	0	17	Adams County	CO	0	17	(17)
Benson County	ND	16	0	16	Multnomah County	OR	0	17	(17)
Grant County	ND	16	0	16	Salt Lake County	UT	0	23	(23)
Pierce County	ND	15	0	15	Yellowstone County	MT	0	32	(32)
Sheridan County	ND	14	0	14	El Paso County	CO	0	35	(35)
Richland County	ND	32	21	11	Other Flows - West		452	363	89
Sioux County	ND	46	42	4	<b>Total West</b>		<b>526</b>	<b>571</b>	<b>(45)</b>
Ramsey County	ND	40	42	(2)	<b>Foreign</b>				
Oliver County	ND	26	31	(5)			<b>16</b>	<b>17</b>	<b>(1)</b>
Ransom County	ND	0	17	(17)	<b>Other</b>				
Morton County	ND	647	717	(70)	Other Flows - Northeast		40	33	7
Cass County	ND	202	319	(117)	Other Flows - Different State		1,104	1,231	(127)
Other Flows - Same State	ND	163	195	(32)	Other Flows - South		123	179	(56)
<b>Total North Dakota</b>		<b>2,253</b>	<b>1,760</b>	<b>493</b>	<b>Total Other</b>		<b>1,267</b>	<b>1,443</b>	<b>(176)</b>
					<b>Total</b>		<b>4,662</b>	<b>4,787</b>	<b>(125)</b>

Source: Internal Revenue Service and URS

Table A.14.b  
Migration,  
Morton County, ND,  
1999 - 2000

County	State	Inflow	Out Flow	Net Migration
<b>North Dakota</b>				
Burleigh County	ND	717	647	70
Mercer County	ND	27	0	27
Stutsman County	ND	20	0	20
Stark County	ND	41	26	15
Sioux County	ND	36	25	11
Ward County	ND	45	44	1
Mclean County	ND	17	17	0
Cass County	ND	45	54	(9)
Grand Forks County	ND	0	17	(17)
Grant County	ND	0	25	(25)
Other Flows - Same State	ND	157	110	47
<b>Total North Dakota</b>		<b>1,105</b>	<b>965</b>	<b>140</b>
<b>Other</b>				
Hennepin County	MN	0	13	(13)
Foreign	FR	0	15	(15)
Other Flows - Different State		354	491	(137)
<b>Total Other</b>		<b>354</b>	<b>519</b>	<b>(165)</b>
<b>Total</b>		<b>1,459</b>	<b>1,484</b>	<b>(25)</b>

Source: Internal Revenue Service and URS

Table B.1.a  
Labor Market Information,  
Burleigh and Morton Counties vs. State of North Dakota,  
1990 - 2001

Year	Burleigh County				Morton County				North Dakota		
	Labor Force	Employment	Unemployment Rate	Burleigh County as a % of ND Total	Labor Force	Employment	Unemployment Rate	Morton County as a % of ND Total	Labor Force	Employment	Unemployment Rate
2001	40,312	39,406	2.2%	12.0%	13,733	13,276	3.3%	4.0%	338,768	329,218	2.8%
2000	39,885	38,993	2.2%	11.9%	13,577	13,136	3.2%	4.0%	338,822	328,716	3.0%
1999	39,449	38,393	2.7%	11.8%	13,461	12,934	3.9%	4.0%	336,822	325,366	3.4%
1998	40,246	39,129	2.8%	11.7%	13,806	13,294	3.7%	4.0%	346,265	335,212	3.2%
1997	40,167	39,260	2.3%	11.6%	13,751	13,324	3.1%	3.9%	347,539	338,691	2.5%
1996	38,930	37,870	2.7%	11.4%	13,439	12,959	3.6%	3.9%	344,174	333,616	3.1%
1995	37,824	36,673	3.0%	11.3%	13,268	12,727	4.1%	3.9%	335,596	324,613	3.3%
1994	36,679	35,278	3.8%	10.9%	12,914	12,310	4.7%	3.8%	336,571	323,508	3.9%
1993	36,172	34,757	3.9%	11.3%	12,799	12,128	5.2%	4.0%	320,227	306,234	4.4%
1992	35,208	33,659	4.4%	11.3%	12,482	11,719	6.1%	3.9%	314,333	298,437	5.1%
1991	34,272	32,910	4.0%	11.0%	12,291	11,651	5.2%	3.9%	313,095	299,763	4.3%
1990	33,171	31,929	3.7%	10.5%	12,141	11,567	4.7%	3.8%	318,054	305,272	4.0%

Source: Job Service North Dakota and URS Corp.

Table B.1.b Labor Market Change, Burleigh and Morton Counties vs. State of North Dakota, 1990 - 2001		
	Change	Average Annual Percentage Change
Burleigh County	7,141	1.79%
Morton County	1,709	1.13%
North Dakota	23,946	0.58%

Source: Job Service North Dakota and URS Corp.

Table B.2.a Largest Manufacturing Employers, North Dakota, 2002		
Company	City	Total Employed
Bobcat	Gwinner	1000
Bobcat	Bismarck	800
CNH Global NV	Fargo	750
Imation Corp	Wahpeton	600
Primewood Inc	Wahpeton	500
TRW Aeronautical Systems	Jamestown	500
Phoenix International Corp	Fargo	400
TMI Systems Design Corp	Dickinson	387
Turtle Mountain Corporation	Dunseith	300
Marvin Windows & Doors	Grafton	275
<b>Tesoro Refining and Marketing Company</b>	<b>Mandan</b>	<b>218</b>
Cardinal IG	Fargo	210
Cirrus Design Corp	Grand Forks	190
Integrity Windows By Marvin	Fargo	185
Crary Company	West Fargo	181
American Woods Inc	Grand Forks	175
G P K Products Inc	Fargo	170
Dakota Machine Inc	West Fargo	165
Mid America Steel Inc	Fargo	158
Duratech Industries International Inc	Jamestown	157
Gremada Industries	West Fargo	153
Fargo Assembly Company Inc	Fargo	150
Tecton Products	Fargo	150
Amerada Hess Corporation	Tioga	130
Red River Manufacturing Inc	West Fargo	125

Source: State of North Dakota and URS Corp.

Table B.2.b Largest Food Employers, North Dakota, 2002		
Company	City	Total Employed
J R Simplot Co	Grand Forks	500
Minn-Dak Farmers Cooperative	Wahpeton	340
<b>Cloverdale Foods Company</b>	<b>Mandan</b>	<b>300</b>
Dakota Growers Pasta Company	Carrington	275
Baker Boy Supply	Dickinson	260
American Crystal Sugar Co	Hillsboro	250
Cavendish Farms	Jamestown	250
American Crystal Sugar Co	Drayton	245
Drayton Enterprises LLC	Fargo	174
Cargill Inc	Wahpeton	150
Pan-O-Gold Baking Co	Fargo	150
Red River Commodities Inc	Fargo	150
ND Mill & Elevator Association	Grand Forks	121
Archer Daniels Midland Co	Enderlin	118
RDO Foods Company	Grand Forks	110
Noodles By Leonardo Inc	Cando	90
Sun Valley Products Inc	Fargo	90
Cargill Malt	Spiritwood	84
Philadelphia Macaroni Co	Grand Forks	84
North American Bison Cooperative	New Rockford	81
Cargill Incorporated	West Fargo	75
Archer Daniels Midland Company	Velva	50
Roman Meal Milling Company Inc	Fargo	50
Minot Milling	Minot	31
Minn-Dak Yeast Company Inc	Wahpeton	20

Source: State of North Dakota and URS Corp.

Table B.2.c Largest Service Employers, North Dakota, 2002		
Company	City	Total Employed
US Bank Service Center	Fargo	1150
Microsoft Great Plains Business Solutions	Fargo	900
Noridian Administrative Services	Fargo	721
ING Minot Service Center	Minot	665
Aetna	Bismarck	660
Sykes Enterprises Inc	Minot	541
Sykes Enterprises Inc	Bismarck	484
Midwest Telemark International	Mohall	386
Rosenbluth International Inc	Fargo	350
Uniband Inc	Belcourt	323
MLT Vacations Inc	Minot	300
Rosenbluth International Inc	Dickinson	300
Choice Hotels International Reservation Center	Minot	279
<b>Laducer &amp; Associates Inc</b>	<b>Mandan</b>	<b>270</b>
Community First Service Corp	Fargo	250
SEI Information Technology	Fargo	240
<b>National Information Solutions Cooperative</b>	<b>Mandan</b>	<b>214</b>
Call Solutions Inc	Williston	210
Medquist	Williston	208
Contact America Inc	Bismarck	180
Navigation Technologies	Fargo	180
WebSmart Interactive Inc	Minot	160
Rosenbluth International Inc	Linton	140
Unisys Corporation	Bismarck	140
Cargill Financial Service Center	Fargo	131

Source: State of North Dakota and URS Corp.

Table B.3  
Average Annual Wages by Industry,  
Morton and Burleigh Counties, State of North Dakota,  
1990 - 2000

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	Average Annual Percentage Change
<b>Morton County</b>												
Construction and Mining	\$23,910	\$20,021	\$19,296	\$19,450	\$19,888	\$25,283	\$20,889	\$23,716	\$25,078	\$26,691	\$26,907	1.2%
Manufacturing	\$26,254	\$27,120	\$28,649	\$28,422	\$30,645	\$32,116	\$31,175	\$31,142	\$32,702	\$33,175	\$32,778	2.2%
Transportation, Comm. & Utilities	\$25,800	\$26,250	\$27,203	\$27,891	\$29,889	\$30,630	\$31,242	\$33,023	\$38,187	\$34,753	\$36,429	3.5%
Trade - Wholesale	\$17,294	\$17,855	\$18,136	\$19,852	\$20,616	\$21,501	\$21,888	\$21,899	\$22,914	\$24,218	\$25,116	3.8%
Trade - Retail	\$10,415	\$11,338	\$11,674	\$11,976	\$12,677	\$13,069	\$13,818	\$15,521	\$15,085	\$15,549	\$16,385	4.6%
Finance, Insurance & Real Estate	\$20,033	\$19,895	\$21,182	\$22,310	\$23,388	\$24,003	\$24,698	\$26,120	\$27,281	\$27,939	\$29,297	3.9%
Services	\$13,291	\$13,342	\$14,259	\$14,556	\$14,441	\$15,078	\$15,573	\$17,158	\$18,144	\$19,433	\$20,358	4.4%
Government	\$17,340	\$17,589	\$18,303	\$18,933	\$19,218	\$19,607	\$20,084	\$20,122	\$21,255	\$21,774	\$22,293	2.5%
<b>Burleigh County</b>												
Construction	\$21,032	\$20,697	\$21,293	\$22,128	\$22,864	\$23,778	\$25,078	\$26,041	\$27,723	\$29,537	\$30,912	3.9%
Manufacturing	\$23,570	\$24,861	\$27,559	\$28,592	\$30,087	\$30,023	\$31,445	\$32,918	\$32,631	\$32,778	\$32,930	3.4%
Transportation, Comm. & Utilities	\$27,917	\$29,036	\$30,292	\$30,473	\$30,825	\$32,264	\$33,808	\$34,513	\$38,962	\$37,775	\$40,476	3.8%
Trade - Wholesale	\$23,286	\$24,252	\$24,768	\$26,325	\$27,200	\$28,018	\$27,683	\$29,397	\$30,449	\$31,472	\$33,137	3.6%
Trade - Retail	\$9,958	\$10,316	\$11,104	\$11,473	\$12,067	\$12,407	\$12,802	\$13,013	\$13,503	\$13,987	\$14,616	3.9%
Finance, Insurance & Real Estate	\$21,923	\$22,218	\$24,318	\$24,421	\$25,394	\$26,174	\$28,282	\$27,691	\$28,867	\$29,778	\$31,187	3.6%
Services	\$19,452	\$20,210	\$20,998	\$21,301	\$21,184	\$22,302	\$22,930	\$23,569	\$24,062	\$24,236	\$25,300	2.7%
Government	\$22,295	\$22,503	\$23,791	\$24,213	\$25,486	\$25,567	\$26,573	\$27,325	\$27,973	\$28,978	\$29,991	3.0%
<b>North Dakota</b>												
Construction	\$21,564	\$21,649	\$22,079	\$22,874	\$23,274	\$24,833	\$26,576	\$27,282	\$28,808	\$31,446	\$31,214	3.8%
Manufacturing	\$20,889	\$21,799	\$22,975	\$23,541	\$24,447	\$25,504	\$26,600	\$27,396	\$28,992	\$29,711	\$30,570	3.9%
Transportation, Comm. & Utilities	\$25,573	\$26,396	\$27,089	\$27,564	\$28,427	\$29,182	\$29,956	\$31,228	\$33,115	\$32,995	\$34,465	3.0%
Trade - Wholesale	\$22,541	\$23,029	\$23,968	\$24,847	\$25,817	\$26,196	\$27,342	\$28,343	\$29,872	\$30,591	\$31,994	3.6%
Trade - Retail	\$9,646	\$9,976	\$10,501	\$10,791	\$11,219	\$11,453	\$11,856	\$12,427	\$12,849	\$13,298	\$13,867	3.7%
Finance, Insurance & Real Estate	\$20,554	\$21,290	\$22,828	\$23,521	\$24,066	\$25,008	\$25,769	\$26,889	\$28,132	\$28,740	\$30,364	4.0%
Services	\$16,198	\$16,705	\$17,492	\$17,735	\$17,980	\$18,648	\$19,351	\$20,084	\$20,782	\$21,702	\$22,817	3.5%
Government	\$19,451	\$20,189	\$21,133	\$21,716	\$22,248	\$22,779	\$23,396	\$24,147	\$24,965	\$25,404	\$26,361	3.1%

Source: Job Service North Dakota and URS Corp.

Table B.4  
Employment Trends By Industry,  
Morton County, ND,  
1990 - 2000

<b>Employment</b>											
Industry	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Construction and Mining	600	466	495	509	559	682	515	545	548	579	557
Manufacturing	803	833	853	884	860	846	884	916	946	985	1,021
Transportation, Comm. & Utilities	436	456	490	462	465	445	446	410	410	452	440
Trade - Wholesale	468	459	494	500	583	598	577	537	533	555	545
Trade - Retail	1,436	1,434	1,501	1,673	1,718	1,752	1,675	1,655	1,677	1,688	1,671
Finance, Insurance & Real Estate	237	243	257	272	277	280	276	286	288	294	313
Services	1,740	1,683	1,664	1,694	1,901	1,956	2,015	2,081	2,190	2,228	2,175
Government	1,308	1,320	1,333	1,330	1,379	1,384	1,402	1,417	1,472	1,486	1,479
<b>Total<sup>1</sup></b>	<b>7,028</b>	<b>6,894</b>	<b>7,087</b>	<b>7,324</b>	<b>7,742</b>	<b>7,943</b>	<b>7,790</b>	<b>7,847</b>	<b>8,064</b>	<b>8,267</b>	<b>8,201</b>

<b>Change in Employment</b>											
Industry	1990-91	1991-92	1992-93	1993-94	1994-95	1995-96	1996-97	1997-98	1998-99	1999-2000	<b>1990 - 2000</b>
Construction and Mining	(134)	29	14	50	123	(167)	30	3	31	(22)	<b>(43)</b>
Manufacturing	30	20	31	(24)	(14)	38	32	30	39	36	<b>218</b>
Transportation, Comm. & Utilities	20	34	(28)	3	(20)	1	(36)	0	42	(12)	<b>4</b>
Trade - Wholesale	(9)	35	6	83	15	(21)	(40)	(4)	22	(10)	<b>77</b>
Trade - Retail	(2)	67	172	45	34	(77)	(20)	22	11	(17)	<b>235</b>
Finance, Insurance & Real Estate	6	14	15	5	3	(4)	10	2	6	19	<b>76</b>
Services	(57)	(19)	30	207	55	59	66	109	38	(53)	<b>435</b>
Government	12	13	(3)	49	5	18	15	55	14	(7)	<b>171</b>
<b>Total<sup>1</sup></b>	<b>(134)</b>	<b>193</b>	<b>237</b>	<b>418</b>	<b>201</b>	<b>(153)</b>	<b>57</b>	<b>217</b>	<b>203</b>	<b>(66)</b>	<b>1,173</b>

<b>Percent Change in Employment</b>											
Industry	1990-91	1991-92	1992-93	1993-94	1994-95	1995-96	1996-97	1997-98	1998-99	1999-2000	<b>1990 - 2000</b>
Construction and Mining	-22.3%	6.2%	2.8%	9.8%	22.0%	-24.5%	5.8%	0.6%	5.7%	-3.8%	<b>-7.7%</b>
Manufacturing	3.7%	2.4%	3.6%	-2.7%	-1.6%	4.5%	3.6%	3.3%	4.1%	3.7%	<b>21.4%</b>
Transportation, Comm. & Utilities	4.6%	7.5%	-5.7%	0.6%	-4.3%	0.2%	-8.1%	0.0%	10.2%	-2.7%	<b>0.9%</b>
Trade - Wholesale	-1.9%	7.6%	1.2%	16.6%	2.6%	-3.5%	-6.9%	-0.7%	4.1%	-1.8%	<b>14.1%</b>
Trade - Retail	-0.1%	4.7%	11.5%	2.7%	2.0%	-4.4%	-1.2%	1.3%	0.7%	-1.0%	<b>14.1%</b>
Finance, Insurance & Real Estate	2.5%	5.8%	5.8%	1.8%	1.1%	-1.4%	3.6%	0.7%	2.1%	6.5%	<b>24.3%</b>
Services	-3.3%	-1.1%	1.8%	12.2%	2.9%	3.0%	3.3%	5.2%	1.7%	-2.4%	<b>20.0%</b>
Government	0.9%	1.0%	-0.2%	3.7%	0.4%	1.3%	1.1%	3.9%	1.0%	-0.5%	<b>11.6%</b>
<b>Total<sup>1</sup></b>	<b>-1.9%</b>	<b>2.8%</b>	<b>3.3%</b>	<b>5.7%</b>	<b>2.6%</b>	<b>-1.9%</b>	<b>0.7%</b>	<b>2.8%</b>	<b>2.5%</b>	<b>-0.8%</b>	<b>14.3%</b>

Note<sup>1</sup> Total does not include Agriculture Employment  
Source: Job Service North Dakota and URS Corp.

Table B.5  
Employment Trends By Industry,  
Burleigh County, ND,  
1990 - 2000

Employment											
Industry	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Construction	1,233	1,303	1,517	1,530	1,653	1,783	1,864	1,987	2,067	2,075	2,089
Manufacturing	1,417	1,419	1,412	1,446	1,526	1,589	1,632	1,785	1,881	1,952	2,025
Transportation, Comm. & Utilities	2,129	2,180	2,249	2,453	2,502	2,461	2,370	2,390	2,369	2,433	2,431
Trade - Wholesale	1,718	1,662	1,697	1,650	1,698	1,761	1,788	1,796	1,842	1,908	1,928
Trade - Retail	6,692	6,954	7,086	7,337	7,369	7,541	7,828	8,087	8,205	8,216	8,322
Finance, Insurance & Real Estate	1,126	1,302	1,385	1,473	1,683	1,736	1,797	1,806	2,010	2,061	2,049
Services	9,694	10,094	10,708	10,850	11,153	11,623	12,166	12,767	13,111	13,671	13,896
Government	6,917	7,300	7,446	7,688	7,551	7,879	7,740	7,871	7,992	8,135	8,350
<b>Total<sup>1</sup></b>	<b>30,926</b>	<b>32,214</b>	<b>33,500</b>	<b>34,427</b>	<b>35,135</b>	<b>36,373</b>	<b>37,185</b>	<b>38,489</b>	<b>39,477</b>	<b>40,451</b>	<b>41,090</b>

Change in Employment											
Industry	1990-91	1991-92	1992-93	1993-94	1994-95	1995-96	1996-97	1997-98	1998-99	1999-2000	1990 - 2000
Construction	70	214	13	123	130	81	123	80	8	14	<b>856</b>
Manufacturing	2	(7)	34	80	63	43	153	96	71	73	<b>608</b>
Transportation, Comm. & Utilities	51	69	204	49	(41)	(91)	20	(21)	64	(2)	<b>302</b>
Trade - Wholesale	(56)	35	(47)	48	63	27	8	46	66	20	<b>210</b>
Trade - Retail	262	132	251	32	172	287	259	118	11	106	<b>1,630</b>
Finance, Insurance & Real Estate	176	83	88	210	53	61	9	204	51	(12)	<b>923</b>
Services	400	614	142	303	470	543	601	344	560	225	<b>4,202</b>
Government	383	146	242	(137)	328	(139)	131	121	143	215	<b>1,433</b>
<b>Total<sup>1</sup></b>	<b>1,288</b>	<b>1,286</b>	<b>927</b>	<b>708</b>	<b>1,238</b>	<b>812</b>	<b>1,304</b>	<b>988</b>	<b>974</b>	<b>639</b>	<b>10,164</b>

Percent Change in Employment											
Industry	1990-91	1991-92	1992-93	1993-94	1994-95	1995-96	1996-97	1997-98	1998-99	1999-2000	1990 - 2000
Construction	5.7%	16.4%	0.9%	8.0%	7.9%	4.5%	6.6%	4.0%	0.4%	0.7%	<b>41.0%</b>
Manufacturing	0.1%	-0.5%	2.4%	5.5%	4.1%	2.7%	9.4%	5.4%	3.8%	3.7%	<b>30.0%</b>
Transportation, Comm. & Utilities	2.4%	3.2%	9.1%	2.0%	-1.6%	-3.7%	0.8%	-0.9%	2.7%	-0.1%	<b>12.4%</b>
Trade - Wholesale	-3.3%	2.1%	-2.8%	2.9%	3.7%	1.5%	0.4%	2.6%	3.6%	1.0%	<b>10.9%</b>
Trade - Retail	3.9%	1.9%	3.5%	0.4%	2.3%	3.8%	3.3%	1.5%	0.1%	1.3%	<b>19.6%</b>
Finance, Insurance & Real Estate	15.6%	6.4%	6.4%	14.3%	3.1%	3.5%	0.5%	11.3%	2.5%	-0.6%	<b>45.0%</b>
Services	4.1%	6.1%	1.3%	2.8%	4.2%	4.7%	4.9%	2.7%	4.3%	1.6%	<b>30.2%</b>
Government	5.5%	2.0%	3.3%	-1.8%	4.3%	-1.8%	1.7%	1.5%	1.8%	2.6%	<b>17.2%</b>
<b>Total<sup>1</sup></b>	<b>4.2%</b>	<b>4.0%</b>	<b>2.8%</b>	<b>2.1%</b>	<b>3.5%</b>	<b>2.2%</b>	<b>3.5%</b>	<b>2.6%</b>	<b>2.5%</b>	<b>1.6%</b>	<b>24.7%</b>

Note <sup>1</sup> Total does not include Mining and Agriculture Employment  
Source: Job Service North Dakota and URS Corp.

Table B.6  
Employment Trends By Industry,  
North Dakota,  
1990 - 2000

Employment											
Industry	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Construction	10,091	10,296	10,962	11,726	12,778	13,575	14,873	14,976	15,612	16,694	15,772
Manufacturing	17,380	17,956	18,269	19,477	21,218	21,756	21,899	23,613	24,259	24,406	25,291
Transportation, Comm. & Utilities	15,231	15,266	15,642	16,027	16,581	16,782	16,803	16,582	16,533	16,739	17,134
Trade - Wholesale	19,354	19,202	19,628	19,301	20,019	20,798	21,211	21,619	21,642	21,833	21,360
Trade - Retail	50,759	52,507	53,721	55,514	56,678	58,203	59,035	59,182	59,776	59,696	60,402
Finance, Insurance & Real Estate	11,968	12,251	12,485	13,003	13,397	13,501	14,015	14,504	15,411	16,167	16,508
Services	62,779	64,768	67,539	70,455	74,123	78,037	81,597	85,121	87,475	89,132	90,399
Government	51,552	51,524	52,748	52,992	53,009	52,994	53,035	53,535	53,593	54,430	55,131
Total <sup>1</sup>	239,114	243,770	250,994	258,495	267,803	275,646	282,468	289,132	294,301	299,097	301,997

Change in Employment											
Industry	1990-91	1991-92	1992-93	1993-94	1994-95	1995-96	1996-97	1997-98	1998-99	1999-2000	1990 - 2000
Construction	205	666	764	1,052	797	1,298	103	636	1,082	(922)	<b>5,681</b>
Manufacturing	576	313	1,208	1,741	538	143	1,714	646	147	885	<b>7,911</b>
Transportation, Comm. & Utilities	35	376	385	554	201	21	(221)	(49)	206	395	<b>1,903</b>
Trade - Wholesale	(152)	426	(327)	718	779	413	408	23	191	(473)	<b>2,006</b>
Trade - Retail	1,748	1,214	1,793	1,164	1,525	832	147	594	(80)	706	<b>9,643</b>
Finance, Insurance & Real Estate	283	234	518	394	104	514	489	907	756	341	<b>4,540</b>
Services	1,989	2,771	2,916	3,668	3,914	3,560	3,524	2,354	1,657	1,267	<b>27,620</b>
Government	(28)	1,224	244	17	(15)	41	500	58	837	701	<b>3,579</b>
Total <sup>1</sup>	4,656	7,224	7,501	9,308	7,843	6,822	6,664	5,169	4,796	2,900	<b>62,883</b>

Percent Change in Employment											
Industry	1990-91	1991-92	1992-93	1993-94	1994-95	1995-96	1996-97	1997-98	1998-99	1999-2000	1990 - 2000
Construction	2.0%	6.5%	7.0%	9.0%	6.2%	9.6%	0.7%	4.2%	6.9%	-5.5%	<b>36.0%</b>
Manufacturing	3.3%	1.7%	6.6%	8.9%	2.5%	0.7%	7.8%	2.7%	0.6%	3.6%	<b>31.3%</b>
Transportation, Comm. & Utilities	0.2%	2.5%	2.5%	3.5%	1.2%	0.1%	-1.3%	-0.3%	1.2%	2.4%	<b>11.1%</b>
Trade - Wholesale	-0.8%	2.2%	-1.7%	3.7%	3.9%	2.0%	1.9%	0.1%	0.9%	-2.2%	<b>9.4%</b>
Trade - Retail	3.4%	2.3%	3.3%	2.1%	2.7%	1.4%	0.2%	1.0%	-0.1%	1.2%	<b>16.0%</b>
Finance, Insurance & Real Estate	2.4%	1.9%	4.1%	3.0%	0.8%	3.8%	3.5%	6.3%	4.9%	2.1%	<b>27.5%</b>
Services	3.2%	4.3%	4.3%	5.2%	5.3%	4.6%	4.3%	2.8%	1.9%	1.4%	<b>30.6%</b>
Government	-0.1%	2.4%	0.5%	0.0%	0.0%	0.1%	0.9%	0.1%	1.6%	1.3%	<b>6.5%</b>
Total <sup>1</sup>	1.9%	3.0%	3.0%	3.6%	2.9%	2.5%	2.4%	1.8%	1.6%	1.0%	<b>20.8%</b>

Note <sup>1</sup> Total does not include Mining and Agriculture Employment  
Source: Job Service North Dakota and URS Corp.

Table B.7  
Percent of Employment Industry,  
Morton and Burleigh Counties and State of North Dakota,  
1990 - 2000

Morton County <sup>1</sup>											
Industry	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Construction and Mining	9%	7%	7%	7%	7%	9%	7%	7%	7%	7%	7%
Manufacturing	11%	12%	12%	12%	11%	11%	11%	12%	12%	12%	12%
Transportation, Comm. & Utilities	6%	7%	7%	6%	6%	6%	6%	5%	5%	5%	5%
Trade - Wholesale	7%	7%	7%	7%	8%	8%	7%	7%	7%	7%	7%
Trade - Retail	20%	21%	21%	23%	22%	22%	22%	21%	21%	20%	20%
Finance, Insurance & Real Estate	3%	4%	4%	4%	4%	4%	4%	4%	4%	4%	4%
Services	25%	24%	23%	23%	25%	25%	26%	27%	27%	27%	27%
Government	19%	19%	19%	18%	18%	17%	18%	18%	18%	18%	18%

Burleigh County <sup>2</sup>											
Industry	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Construction	4%	4%	5%	4%	5%	5%	5%	5%	5%	5%	5%
Manufacturing	5%	4%	4%	4%	4%	4%	4%	5%	5%	5%	5%
Transportation, Comm. & Utilities	7%	7%	7%	7%	7%	7%	6%	6%	6%	6%	6%
Trade - Wholesale	6%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
Trade - Retail	22%	22%	21%	21%	21%	21%	21%	21%	21%	20%	20%
Finance, Insurance & Real Estate	4%	4%	4%	4%	5%	5%	5%	5%	5%	5%	5%
Services	31%	31%	32%	32%	32%	32%	33%	33%	33%	34%	34%
Government	22%	23%	22%	22%	21%	22%	21%	20%	20%	20%	20%

North Dakota <sup>2</sup>											
Industry	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Construction	4%	4%	4%	5%	5%	5%	5%	5%	5%	6%	5%
Manufacturing	7%	7%	7%	8%	8%	8%	8%	8%	8%	8%	8%
Transportation, Comm. & Utilities	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%	6%
Trade - Wholesale	8%	8%	8%	7%	7%	8%	8%	7%	7%	7%	7%
Trade - Retail	21%	22%	21%	21%	21%	21%	21%	20%	20%	20%	20%
Finance, Insurance & Real Estate	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%	5%
Services	26%	27%	27%	27%	28%	28%	29%	29%	30%	30%	30%
Government	22%	21%	21%	21%	20%	19%	19%	19%	18%	18%	18%

Notes: <sup>1</sup> Does not include Agriculture

<sup>2</sup> Does not include Mining or Agriculture

Source: Job Service North Dakota and URS Corp.

**Table B.8**  
**North Dakota State Agency Office Space Leases By Location, Square Feet, Cost per Square Foot, and Lease Terms,**  
**Cities of Mandan and Bismarck, ND,**  
**2003 - 2005**

<b>Agency</b>	<b>Location of Leased Office Space</b>	<b>City</b>	<b>Total Square Feet</b>	<b>Cost per SF</b>	<b>Terms of Lease</b>	<b>Lease Expire</b>
Aeronautics Comm.	Bismarck City Airport, Bldg #22, University Drive	Bismarck	2,175	\$10.98	2 years	Aug-03
Arts Council of North Dakota	City Center Plaza, 418 E. Broadway Ave, Suite 70	Bismarck	1,166	\$8.64	2 years	Jun-03
<i>*Arts Council of North Dakota</i>	<i>1600 East Century Ave, Suite 6</i>	<i>Bismarck</i>	<i>1,261</i>	<i>\$13.00</i>	<i>2 years</i>	<i>Jun-05</i>
Attorney General	116 N 4th St.	Bismarck	10,000	\$8.43	2 years	Jun-03
Attorney General, BCI, Fire Marshall	Professional North Office Building, 4205 State St.	Bismarck	11,010	\$9.55	2 years	Jun-03
Auditor's Office	425 N. 5th St, 3rd Flr	Bismarck	1,003	\$11.50	1 year	Sep-03
Auditor's Office	925 Basin Ave	Bismarck	768	\$10.50	2 years	Jun-03
Banking and Finance	2000 Schafer St.	Bismarck	2,955	\$12.50	4 years	Jun-03
Career Resource Network	City Center Plaza, 418 E. Broadway Ave, Suite 70	Bismarck	1,166	\$8.65	2 years	Jun-03
Career Resource Network	1720 Burnt Boat Drive, Lower level	Bismarck	653	\$9.76	1 year	Jun-03
<i>*Career Resource Network</i>	<i>1600 East Century Ave</i>	<i>Bismarck</i>	<i>1,261</i>	<i>\$13.00</i>	<i>2 years</i>	<i>Jun-05</i>
Department of Commerce	Dakota Northwestern Building, Suite 50 400 E. Broadway	Bismarck	9,084	\$10.19	2 years	Jul-03
Department of Commerce	Dakota Northwestern Building, Suite 616, 400 E. Broadway	Bismarck	1,785	\$12.35	23 months	Jul-03
Department of Commerce	Dakota Northwestern Building, 400 E. Broadway	Bismarck	2,796	\$9.52	23 months	Jul-03
<i>*Department of Commerce</i>	<i>1600 East Century Ave, Suite 2</i>	<i>Bismarck</i>	<i>15,368</i>	<i>\$13.00</i>	<i>2 years</i>	<i>2005</i>
Disciplinary BRD/Judicial Con.	Parkade Building, 515 1/2 E Broadway, Suite 102	Bismarck	700	\$10.20	2 years	Jun-03
Division of Juvenile Services	City Center Plaza, 418 E. Broadway Ave, Suite 224	Bismarck	1,857	\$9.76	2 years	Jun-03
DOCR (Field Services Div)	523 E. Expressway, Suite 6	Bismarck	200	\$11.70	23 months	Jun-03
DOCR (Field Services Div)	515 E. Main St., Suites 6,7,8, & 10	Bismarck	1,160	\$9.05	2 years	Jun-03
DOCR (Field Services Div)	1110 College Dr., Suite 209	Bismarck	349	\$8.60	2 years	Jun-03
DOCR (Field Services Div)	300 1st Street NW	Mandan	950	\$6.69	2 years	Jun-03
Health Department	1205 Ave A West & 417 Shireley	Bismarck	6,632	\$12.54	1 year	Jun-03
Health Department	1200 Missouri Ave	Bismarck	20,560	\$10.50	2 years	Jun-03
Housing Finance	1500 E. Capital Ave	Bismarck	7,980	\$11.50	29.5 months	Jun-03
Human Services	Dacotah Foundation Bldg, 600 South 2nd St.	Bismarck	12,883	\$10.77	2 years	Jun-03
Human Services	Dacotah Foundation Bldg, 600 South 2nd St.	Bismarck	30,636	\$10.77	2 years	Jun-03
Human Services	Dacotah Foundation Bldg, 600 South 2nd St.	Bismarck	7,684	\$12.08	2 years	Jun-03
Human Services	Northbrook Mall, 1929 N. Washington St., Suites SS, KK, Y, K, FF, Z	Bismarck	7,084	\$12.04	2 years	Jun-03
Human Services	Northbrook Mall, 1929 N. Washington St., Suites I & HH	Bismarck	5,108	\$12.04	2 years	Jun-03
Human Services	4007 State St., Suite 101	Bismarck	400	\$3.77	2 years	Jun-03
<i>*Human Services</i>	<i>1600 East Century Ave</i>	<i>Bismarck</i>	<i>9,251</i>	<i>\$13.00</i>	<i>2 years</i>	<i>Jun-05</i>
Ind. Com. Geological Survey	1016 E. Calgary Ave	Bismarck	6,116	\$12.01	2 years	Jun-03
Ind. Com. -Oil & Gas Div.	1016 E. Calgary Ave	Bismarck	9,175	\$12.01	2 years	Jun-03
Info Tech Dept.	Northbrook Mall, 1929 N. Washington St.	Bismarck	5,346	\$11.68	35 months	Jun-03
Insurance	425 N. 5th Street	Bismarck	3,186	\$10.25	18 months	Jun-03
Job Service	200 N. 3rd St, Suite 210 & 290	Bismarck	4,664	\$12.00	5 years	Oct-04
ND Board of Nursing	Kirkwood Office Tower, 919 7th St., Suite 504	Bismarck	2,406	\$10.75	2 years	Jun-03
Office of Administrative Hearings	1707 N. 9th St.	Bismarck	1,136	\$10.50	2 years	na
Parks & Recreation	1835 Bismarck Expressway	Bismarck	8,460	\$9.15	2 years	Jun-03
<i>*Parks &amp; Recreation</i>	<i>1600 East Century Ave</i>	<i>Bismarck</i>	<i>5,426</i>	<i>\$13.00</i>	<i>2 years</i>	<i>2005</i>
Plumbing Board	204 W. Thayer Ave	Bismarck	530	\$10.10	2 years	Jun-04
Protection and Advocacy	Dakota Northwestern Building, 400 E. Broadway	Bismarck	3,430	\$9.00	22 months	Jun-03
Public Employees Retirement System	Dakota Northwestern Building, 400 E. Broadway	Bismarck	6,442	\$12.25	22 months	Jun-03
Real Estate Comm.	314 E. Thayer Ave	Bismarck	615	\$7.61	36 months	Sep-03
Reg. Board of prof. Engineers and Land Surveyors	721 West memorial Highway	Bismarck	666	\$8.75	2 years	Jun-03
Risk Management	Wells Fargo Bank Building, 400 E. Broadway	Bismarck	1,359	\$11.25	2 years	Jun-03
<i>*Risk Management</i>	<i>1600 East Century Avenue</i>	<i>Bismarck</i>	<i>1,510</i>	<i>\$13.00</i>	<i>2 years</i>	<i>Jun-05</i>
Wheat Commission	AG Gfoundation Building, 4023 State St.	Bismarck	3,505	\$8.00	5 years, 7 months	Jun-05
Total Leased Square Feet: 239,857				\$10.76	Median	
<i>*Less: Future leased space in the new North Dakota Workers Compensation Building on 1600 East Century</i>				<i>34,077</i>	<i>Average</i>	
<b>Total Square Feet Currently Leased: 205,780</b>				<b>\$3.77</b>	Minimum	
				<b>\$13.00</b>	Maximum	

\* Recently signed future 2- year leases, expiring in June 2005, for space in the new Workers Compensation Building on 1600 East Century Avenue in Bismarck  
Source: State of North Dakota and URS Corp.

Table C.1  
Competitive Apartment Survey,  
Bismarck, ND  
Fall, 2002

Community	Terrace Point	Cottonwood	Alberta Heights	Kirkwood Manor	North Pointe	Turnpike	Westwood Park
Project Overview							
Address	3635 Valcartier St.	2020 South 12th St.	4111 Lockport Garsten	140 Indiana Avenue East	1930 East Capitol Ave	2140 North Xavier St.	1101 Westwood St
Owner	IMM Apartments	IMM Apartments	Perennial Bismarck	IMM Apartments	IMM Apartments	IMM Apartments	IMM Apartments
City	Bismarck	Bismarck	Bismarck	Bismarck	Bismarck	Bismarck	Bismarck
Year Built							
Phase I	2002	1998	2001	1983	1995	1999	1984
Phase II	na	1999 & 2000	2002	na	na	na	na
Number of Floors	2	3	na	3	3	3	3
Total Units Built	36	201	68	108	69	36	64
Occupancy	92%	91%	93%	97%	87%	89%	95%
Studio							
Number of Units	na	3	na	na	1	na	na
Square Footage	na	724	na	na	na	na	na
Base Rent	na	\$460	na	na	\$430	na	na
Rent/ Sq. Ft.	na	\$0.64	na	na	na	na	na
One Bedroom							
Number of Units	3	36	15	4	13	1	6
Square Footage	825	785	780	550	816	683	736
Base Rent	\$570	\$610	\$475	\$460	\$575	\$515	\$495
Rent/ Sq. Ft.	\$0.69	\$0.78	\$0.61	\$0.84	\$0.70	\$0.75	\$0.67
Two Bedroom							
Number of Units	30	108	38	103	46	35	55
Square Footage	960	1240	1,050	960	1,040	890	816
Base Rent	\$715	\$740	\$550	\$565	\$700	\$615	\$575
Rent/ Sq. Ft.	\$0.74	\$0.60	\$0.52	\$0.59	\$0.67	\$0.69	\$0.70
Three Bedroom							
Number of Units	3	54	15	na	9	na	3
Square Footage	1080	1463	1,320	na	1,362	na	915
Base Rent	\$820	\$820	\$675	na	\$815	na	\$615
Rent/ Sq. Ft.	\$0.76	\$0.56	\$0.51	na	\$0.60	na	\$0.67
Comments	Dishwashers, Central Air, Washer/Dryer	Dishwashers, Central Air, Washer/Dryer, Fitness Room	na	Air Conditioning, One unit is on site office	Dishwashers, Central Air, Washer/Dryer	Dishwashers, Central Air, Washer/Dryer	Waher/Dryer Hookups, Dishwashers, Fireplaces, AC

Source: Individual Properties and URS Corp.

Table C.2  
Residential Sales by Structure Type,  
Mandan and Bismarck, ND,  
2000 through September 2002

	2000		2001		2002 <sup>1</sup>	
	Mandan	Bismarck	Mandan	Bismarck	Mandan	Bismarck
<b>Single-Family Residential</b>						
Number on Market	148	486	335	939	239	752
Number Sold	101	345	176	504	128	369
Average Sales Price (SP)	\$78,467	\$111,710	\$95,887	\$115,355	\$88,905	\$114,447
SP as % of List Price	98%	98%	97%	97%	97%	97%
Average Days on Market	43	43	75	65	55	63
<b>Condo/Townhome</b>						
Number on Market	29	176	38	307	55	226
Number Sold	15	120	16	171	11	121
Average Sales Price (SP)	\$97,553	\$82,603	\$93,194	\$88,908	\$91,341	\$89,239
Median Sales Price	na	na	\$72,250	\$84,500	\$72,700	\$85,000
SP as % of List Price	98%	98%	97%	98%	97%	98%
Average Days on Market	138	80	204	91	41	69
<b>Duplex</b>						
Number on Market	na	10	7	48	11	49
Number Sold	na	1	4	19	7	24
Average Sales Price (SP)	na	\$109,900	\$54,850	\$83,405	\$72,353	\$77,578
SP as % of List Price	na	100%	95%	97%	98%	97%
Average Days on Market	na	45	62	99	85	68
<b>Multi-Family</b>						
Number on Market	7	48	14	39	9	24
Number Sold	3	27	7	15	7	11
Average Sales Price (SP)	\$79,967	\$102,213	\$112,757	\$106,790	\$154,857	\$123,718
SP as % of List Price	96%	96%	89%	95%	93%	96%
Average Days on Market	69	66	119	110	53	115

Note: <sup>1</sup> Data is as of September 2002

Source: Multiple Listing Service, Century 21, Landmark Realty, Inc., and URS

Table C.3.a Residential Building Permits, Bismarck, ND, 1996 - 2002							
	1996	1997	1998	1999	2000	2001	2002 <sup>1</sup>
Single Family	164	136	163	140	123	179	74
Two Family	2	7	5	25	22	7	2
Three and Four Family	1	4	8	7	16	10	1
Five or More Family	4	11	5	3	0	10	4
Total	171	158	181	175	161	206	81

Table C.3.b Residential Building Permits, by Number of Units, Bismarck, ND, 1996 - 2002							
	1996	1997	1998	1999	2000	2001	2002 <sup>1</sup>
Single Family	164	136	163	140	123	179	74
Two Family	4	14	10	50	44	14	4
Three and Four Family	4	16	31	27	64	39	4
Five or More Family	78	286	224	44	0	216	56
Total	250	452	428	261	231	448	138

Table C.3.c Residential Building Permits by Total Value, Bismarck, ND, 1996 - 2002							
	1996	1997	1998	1999	2000	2001	2002 <sup>1</sup>
Single Family	\$18,263,615	\$15,037,140	\$22,323,949	\$19,769,529	\$17,598,333	\$27,094,593	\$11,551,206
Two Family	\$329,000	\$1,261,064	\$1,104,747	\$6,796,004	\$5,868,222	\$1,853,133	\$617,718
Three and Four Family	\$270,000	\$1,035,000	\$2,857,000	\$2,248,060	\$5,579,000	\$3,825,645	\$300,000
Five or More Family	\$3,177,000	\$13,533,254	\$14,689,199	\$1,194,919	\$0	\$10,615,823	\$2,960,832
Total	\$22,039,615	\$30,866,458	\$40,974,895	\$30,008,512	\$29,045,555	\$43,389,194	\$15,429,756

Table C.3.d Average Residential Building Permit Value, Bismarck, ND, 1996 - 2002							
	1996	1997	1998	1999	2000	2001	2002 <sup>1</sup>
Single Family	\$111,364	\$110,567	\$136,957	\$141,211	\$143,076	\$151,366	\$156,097
Two Family	\$164,500	\$180,152	\$220,949	\$271,840	\$266,737	\$264,733	\$308,859
Three and Four Family	\$270,000	\$258,750	\$357,125	\$321,151	\$348,688	\$382,565	\$300,000
Five or More Family	\$794,250	\$1,230,296	\$2,937,840	\$398,306	na	\$1,061,582	\$740,208
Total	\$128,887	\$195,357	\$226,381	\$171,477	\$180,407	\$210,627	\$190,491

Table C.3.e Average Residential Unit Value, by Permits, Bismarck, ND, 1996 - 2002							
	1996	1997	1998	1999	2000	2001	2002 <sup>1</sup>
Single Family	\$111,364	\$110,567	\$136,957	\$141,211	\$143,076	\$151,366	\$156,097
Two Family	\$82,250	\$90,076	\$110,475	\$135,920	\$133,369	\$132,367	\$154,430
Three and Four Family	\$67,500	\$64,688	\$92,161	\$83,261	\$87,172	\$98,093	\$75,000
Five or More Family	\$40,731	\$47,319	\$65,577	\$27,157	na	\$49,147	\$52,872
Total	\$88,158	\$68,289	\$95,736	\$114,975	\$125,738	\$96,851	\$111,810

Notes: <sup>1</sup> Through June 2002

Source: US Census Bureau and URS Corp.

Table C.4.a Residential Building Permits, Mandan, ND, 1996 - 2002							
	1996	1997	1998	1999	2000	2001	2002 <sup>1</sup>
Single Family	75	53	69	60	62	59	29
Two Family	2	0	0	0	0	0	0
Three and Four Family	0	0	0	0	0	2	0
Five or More Family	3	3	4	4	1	1	2
Total	80	56	73	64	63	62	31

Table C.4.b Residential Building Permits, by Number of Units, Mandan, ND, 1996 - 2002							
	1996	1997	1998	1999	2000	2001	2002 <sup>1</sup>
Single Family	75	53	69	60	62	59	29
Two Family	4	0	0	0	0	0	0
Three and Four Family	0	0	0	0	0	8	0
Five or More Family	26	28	40	48	8	12	24
Total	105	81	109	108	70	79	53

Table C.4.c Residential Building Permits by Total Value, Mandan, ND, 1996 - 2002							
	1996	1997	1998	1999	2000	2001	2002 <sup>1</sup>
Single Family	\$6,512,034	\$5,139,068	\$6,977,104	\$5,337,589	\$6,400,052	\$6,706,556	\$3,583,050
Two Family	\$207,936	\$0	\$0	\$0	\$0	\$0	\$0
Three and Four Family	\$0	\$0	\$0	\$0	\$0	\$893,187	\$0
Five or More Family	\$1,621,998	\$1,064,908	\$1,736,228	\$2,492,960	\$659,008	\$536,976	\$913,816
Total	\$8,341,968	\$6,203,976	\$8,713,332	\$7,830,549	\$7,059,060	\$8,136,719	\$4,496,866

Table C.4.d Average Residential Building Permit Value, Mandan, ND, 1996 - 2002							
	1996	1997	1998	1999	2000	2001	2002 <sup>1</sup>
Single Family	\$86,827	\$96,964	\$101,117	\$88,960	\$103,227	\$113,670	\$123,553
Two Family	\$103,968	na	na	na	na	n	na
Three and Four Family	na	na	na	na	na	\$446,594	na
Five or More Family	\$540,666	\$354,969	\$434,057	\$623,240	\$659,008	\$536,976	\$456,908
Total	\$104,275	\$110,785	\$119,361	\$122,352	\$112,049	\$131,237	\$145,060

Table C.4.e Average Residential Unit Value, by Permits, Mandan, ND, 1996 - 2002							
	1996	1997	1998	1999	2000	2001	2002 <sup>1</sup>
Single Family	\$86,827	\$96,964	\$101,117	\$88,960	\$103,227	\$113,670	\$123,553
Two Family	\$51,984	na	na	na	na	na	na
Three and Four Family	na	na	na	na	na	\$111,648	na
Five or More Family	\$62,385	\$38,032	\$43,406	\$51,937	\$82,376	\$44,748	\$38,076
Total	\$79,447	\$76,592	\$79,939	\$72,505	\$100,844	\$102,996	\$84,847

Notes: <sup>1</sup> Through May 2002

Source: US Census Bureau and URS Corp.

Table C.5  
Building Permits - Total Value by Category,  
City of Mandan, ND,  
1993 - 2002

Category	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002 <sup>1</sup>
Single Family Dwellings	\$6,019,036	\$9,588,994	\$6,469,962	\$6,204,083	\$5,139,068	\$5,797,975	\$5,352,102	\$6,405,731	\$6,706,556	\$9,909,976
Variance Request	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Two Family dwellings	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Fireplace	\$0	\$0	\$16,200	\$27,000	\$32,462	\$31,080	\$19,400	\$18,400	\$34,075	\$32,300
Condominiums	\$0	\$0	\$0	\$1,241,998	\$0	\$0	\$1,592,960	\$414,064	\$893,187	\$1,239,134
Miscellaneous	\$33,125	\$152,920	\$53,940	\$148,600	\$89,080	\$48,708	\$52,524	\$436,310	\$202,852	\$97,623
New Mobile Homes - Owned Lots	\$310,500	\$130,400	\$279,808	\$222,328	\$185,800	\$254,195	\$399,437	\$269,970	\$105,000	\$196,900
Townhouse	\$0	\$631,596	\$499,141	\$522,928	\$0	\$1,182,470	\$0	\$659,008	\$0	\$190,798
Residential Remodelling and Additions	\$488,163	\$572,501	\$533,051	\$555,580	\$815,032	\$499,483	\$538,409	\$494,624	\$674,018	\$869,788
Fireworks Display	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Garages	\$291,438	\$339,246	\$328,472	\$431,200	\$368,796	\$248,896	\$330,072	\$331,784	\$505,797	\$603,054
Garage Addition	\$0	\$0	\$0	\$25,204	\$41,728	\$63,148	\$24,592	\$27,796	\$26,944	\$48,360
Sheds	\$68,165	\$76,070	\$59,989	\$92,426	\$59,429	\$50,532	\$79,217	\$84,412	\$70,268	\$61,170
Pole Barn	\$4,267	\$0	\$0	\$31,440	\$42,132	\$0	\$0	\$11,400	\$16,639	\$0
Shop	\$0	\$0	\$0	\$21,504	\$0	\$35,760	\$0	\$188,432	\$26,800	\$35,616
Apartment Buildings	\$344,096	\$185,000	\$192,800	\$472,400	\$1,124,908	\$1,736,228	\$900,000	\$0	\$536,976	\$5,221,959
Apartment Remodeling/Additions	\$0	\$17,000	\$35,800	\$0	\$1,300	\$13,000	\$800	\$0	\$0	\$0
New Commercial and Industrial Buildings	\$2,842,052	\$1,099,040	\$2,002,868	\$1,589,090	\$1,799,026	\$3,917,000	\$1,819,506	\$3,685,844	\$5,227,970	\$3,180,846
Commercial Remodeling and Additions	\$2,033,582	\$1,754,190	\$4,357,072	\$1,488,546	\$4,584,740	\$1,940,260	\$4,082,319	\$678,615	\$1,930,144	\$693,756
New Mobile Homes - Rented Lots	\$840,719	\$628,278	\$814,246	\$593,470	\$423,912	\$614,504	\$839,330	\$606,300	\$376,250	\$233,800
Remodeling Mobile Homes - Rented Lots	\$34,239	\$29,956	\$65,610	\$88,342	\$27,120	\$20,410	\$74,736	\$20,548	\$110,050	\$31,508
Decks	\$0	\$111,882	\$125,448	\$149,070	\$113,132	\$134,046	\$98,998	\$100,174	\$114,800	\$115,884
New Public Buildings	\$3,935,736	\$0	\$61,697	\$1,722,000	\$603,992	\$515,230	\$0	\$66,595	\$0	\$0
Remodeling and Additions - Public Buildings	\$143,500	\$192,022	\$574,595	\$576,383	\$4,207,085	\$1,451,238	\$652,315	\$1,640,727	\$45,000	\$547,380
Demolitions Commercial	\$0	\$5,000	\$44,000	\$39,871	\$26,000	\$500	\$25,000	\$0	\$2,000	\$6,000
Demolition	\$0	\$4,300	\$19,136	\$29,200	\$18,700	\$61,000	\$30,000	\$12,200	\$14,000	\$6,900
Satellite Dish	\$0	\$0	\$7,500	\$2,478	\$99	\$0	\$0	\$1,300	\$0	\$0
Moving Commercial	\$0	\$5,000	\$1,056	\$7,500	\$4,800	\$300	\$0	\$0	\$0	\$0
Moving Residential	\$80,996	\$1,000	\$17,600	\$0	\$10,200	\$100,140	\$55,000	\$0	\$10,600	\$4,000
Sign	\$65,065	\$20,100	\$81,918	\$84,000	\$52,761	\$62,253	\$147,615	\$113,367	\$79,600	\$230,207
<b>Total</b>	<b>\$17,534,679</b>	<b>\$15,544,495</b>	<b>\$16,641,909</b>	<b>\$16,366,641</b>	<b>\$19,771,302</b>	<b>\$18,778,356</b>	<b>\$17,114,332</b>	<b>\$16,267,601</b>	<b>\$17,709,526</b>	<b>\$23,556,959</b>

Note: <sup>1</sup> 2002 data as of November 2002

Source: City of Mandan, Building Department and URS Corp.

Table C.6  
 Building Permits - Total Number by Category,  
 City of Mandan, ND,  
 1993 - 2002

Category	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002 <sup>1</sup>
Single Family Dwellings	65	104	72	71	53	59	60	62	59	73
Variance Request	0	0	11	24	11	10	21	17	16	18
Two Family dwellings	0	0	0	0	0	0	0	0	0	0
Fireplace	0	0	13	17	23	20	12	11	16	18
Condominiums	0	0	0	10	0	0	20	4	8	12
Miscellaneous	13	9	12	11	9	19	15	14	23	16
New Mobile Homes - Owned Lots	18	7	13	9	5	7	10	6	3	6
Townhouse	0	7	6	6	0	13	0	8	0	2
Residential Remodelling and Additions	138	99	118	95	115	74	96	66	73	96
Fireworks Display	0	0	0	0	0	0	0	0	0	0
Garages	43	44	41	42	41	29	37	37	47	53
Garage Addition	0	0	0	4	3	4	4	5	5	7
Sheds	91	88	86	100	68	67	85	98	82	73
Pole Barn	1	0	0	2	3	0	0	1	2	0
Shop	0	0	0	1	0	2	0	2	1	2
Apartment Buildings	3	1	1	3	3	4	3	0	1	5
Apartment Remodeling/Additions	0	2	2	0	1	2	1	0	0	0
New Commercial and Industrial Buildings	13	15	9	14	11	13	14	15	11	15
Commercial Remodeling and Additions	45	40	37	53	45	28	40	31	33	27
New Mobile Homes - Rented Lots	86	63	62	45	34	31	38	26	19	21
Remodeling Mobile Homes - Rented Lots	39	20	33	16	15	17	15	10	24	11
Decks	0	77	81	78	71	72	77	61	67	60
New Public Buildings	2	0	1	3	3	2	0	1	0	0
Remodeling and Additions - Public Buildings	4	4	3	3	12	3	2	5	2	2
Demolitions Commercial	0	1	3	3	3	1	1	0	1	2
Demolition	0	3	3	5	4	12	4	6	3	3
Satellite Dish	0	0	3	2	1	0	0	1	0	0
Moving Commercial	0	1	1	2	2	1	0	0	0	0
Moving Residential	5	2	4	0	4	5	4	0	3	1
Sign	28	15	15	17	17	19	25	21	18	15
<b>Total</b>	<b>594</b>	<b>602</b>	<b>630</b>	<b>636</b>	<b>557</b>	<b>514</b>	<b>584</b>	<b>508</b>	<b>517</b>	<b>538</b>

Note: <sup>1</sup> 2002 data as of November 2002

Source: City of Mandan, Building Department and URS Corp.

Table C.7  
 Building Permits - Total Units by Category,  
 City of Mandan, ND,  
 1993 - 2002

Category	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002 <sup>1</sup>
Single Family Dwellings	65	104	72	71	53	59	60	62	59	73
Variance Request	0	0	0	0	0	0	0	0	0	0
Two Family dwellings	0	0	0	0	0	0	0	0	0	0
Fireplace	0	0	0	0	0	0	0	0	0	0
Condominiums	0	0	0	10	0	0	20	4	8	12
Miscellaneous	0	0	0	0	0	0	0	0	0	0
New Mobile Homes - Owned Lots	18	7	13	9	5	7	10	6	3	6
Townhouse	0	7	6	6	0	13	0	8	0	2
Residential Remodelling and Additions	0	0	0	0	0	0	0	1	0	4
Fireworks Display	0	0	0	0	0	0	0	0	0	0
Garages	0	0	0	0	0	0	0	0	0	0
Garage Addition	0	0	0	0	0	0	0	0	0	0
Sheds	0	0	1	0	0	0	0	0	0	0
Pole Barn	0	0	0	0	0	0	0	0	0	0
Shop	0	0	0	0	0	0	0	0	0	0
Apartment Buildings	12	4	4	20	28	40	28	0	12	92
Apartment Remodeling/Additions	0	13	12	0	4	2	1	0	0	0
New Commercial and Industrial Buildings	0	0	0	0	0	0	0	1	0	0
Commercial Remodeling and Additions	0	0	0	0	0	0	0	0	0	0
New Mobile Homes - Rented Lots	0	0	1	0	0	0	0	0	0	0
Remodeling Mobile Homes - Rented Lots	0	0	0	1	0	0	0	0	1	0
Decks	0	0	0	0	0	0	0	1	0	0
New Public Buildings	0	0	0	0	0	0	0	0	0	0
Remodeling and Additions - Public Buildings	0	0	0	0	0	0	0	0	0	0
Demolitions Commercial	0	0	0	0	0	0	0	0	0	0
Demolition	0	0	0	0	0	0	0	0	0	0
Satellite Dish	0	0	0	0	0	0	0	0	0	0
Moving Commercial	0	0	0	0	0	0	0	0	0	0
Moving Residential	0	0	0	0	0	0	0	0	0	0
Sign	0	0	0	0	0	0	0	0	0	0
<b>Total</b>	<b>95</b>	<b>135</b>	<b>109</b>	<b>117</b>	<b>90</b>	<b>121</b>	<b>119</b>	<b>83</b>	<b>83</b>	<b>189</b>

Note: <sup>1</sup> 2002 data as of November 2002

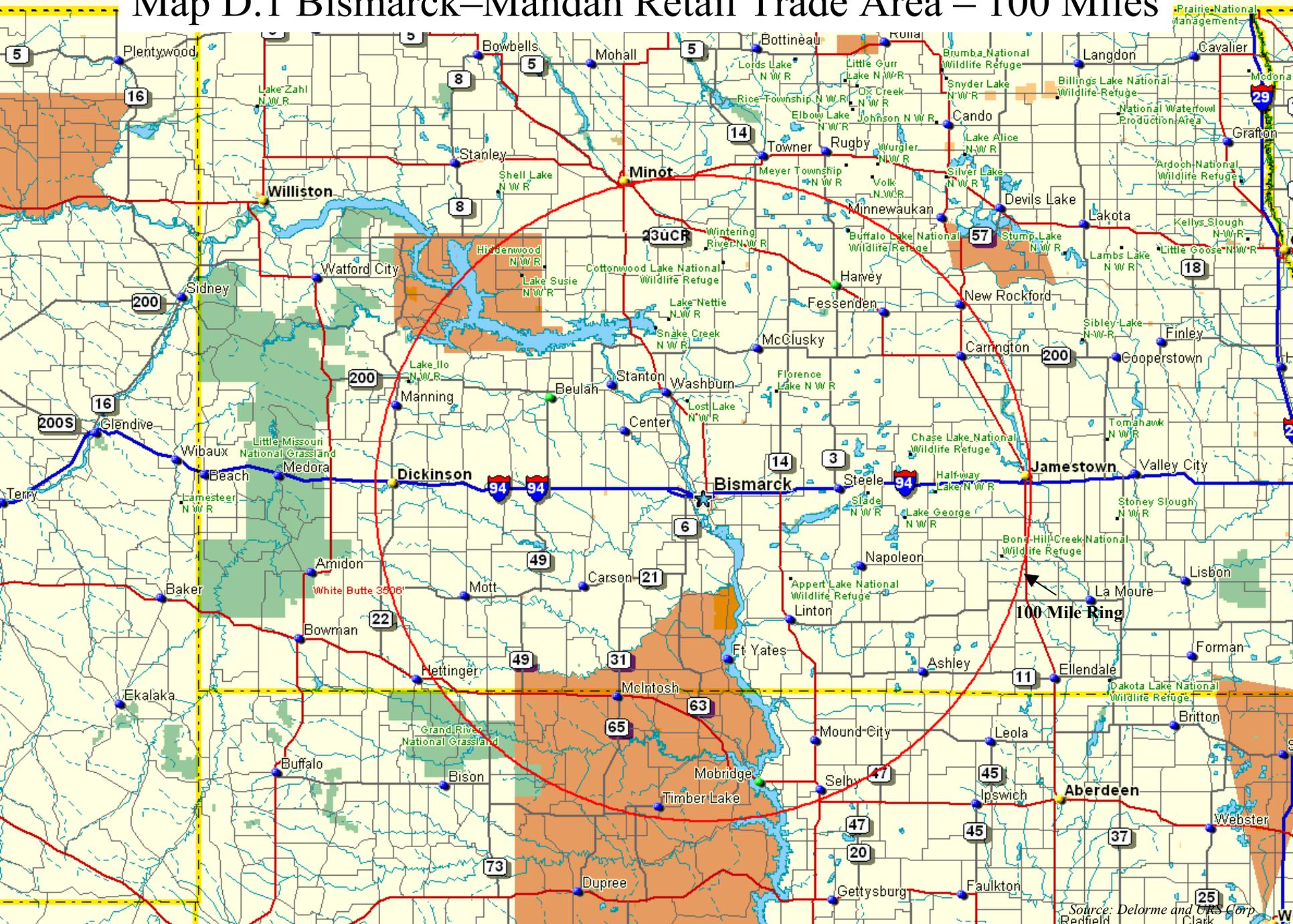
Source: City of Mandan, Building Department and URS Corp.

Table C.8  
Competitive Apartment Developments,  
City of Mandan, ND,  
Fall 2002

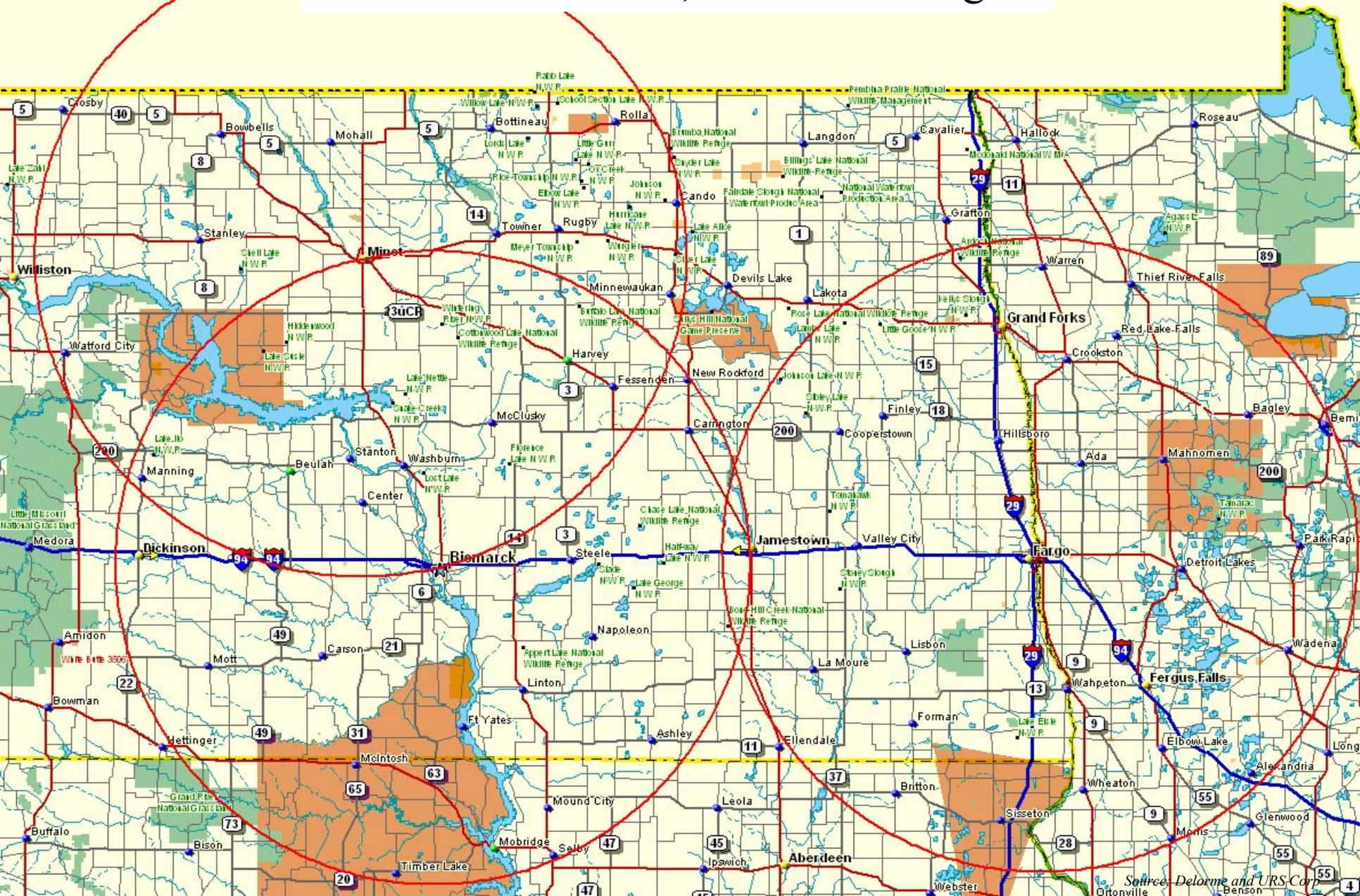
Name and Location/ Developer	Year Built	Type of Building	No. of Units	No. Rented	Vacant Units	No. of Bedroom/Bath	Unit Size (S.F.)	Rent per Month (\$)	Renter Profile	Amenities	Comments
Library Square Apartments First Street and Collins Ave/ MetroPlains Development and Lewis & Clark Community Works	Under Construction Began Sept. 2002	5-story building	46	na	na	22 2-bed units & 24 1-bed units	na	\$275 - \$550	age requirement: 55+ years	Elevator, community room with serving kitchen, guest room available for visiting family/guests, one parking space per unit	All affordable units: 60% of median income or below. Estimated completion Sept. 2003. Public funding assistance given. 60 people on waiting list (very few from outside of Mandan)
Old Trail Road (across from Seven Seas Hotel)/ Perry Schloser	3 buildings complete - 2002, 1 building under construction	Four 12-unit, 2-story buildings	48	33	3	2/1	4 units: 1,080 sf 8 units: 1,120 sf 36 units: 1,200 sf	\$625, \$650, \$700 (utilities included)	Retirees, retired farmers, college students, young couples	Washer and dryer in each unit, single car garage with each unit, additional uncovered spaces available	na
River Place Apartments 3111 Marina Road SE/ Mike Wachter	December 2002 and January 2003	Two 12-unit, 2-story buildings	24	6	6	1, 2, and 3 bedrooms	800 sf, 1,200 sf, 1,400 sf	2-bed: \$700+	Retirees and middle-aged persons	Washer and dryer in each unit, 2-car garage	First building just completed within last month. Second building to be completed in January.
Off of 46th Ave in Marina Bay Area/ Charles Schaeffbauer	Under Construction	na	12	na	na	2 bedroom	1,200	na	na	na	Rents not yet determined. Will be advertising in the next few months.

Source: Property owners and URS Corp.

# Map D.1 Bismarck–Mandan Retail Trade Area – 100 Miles

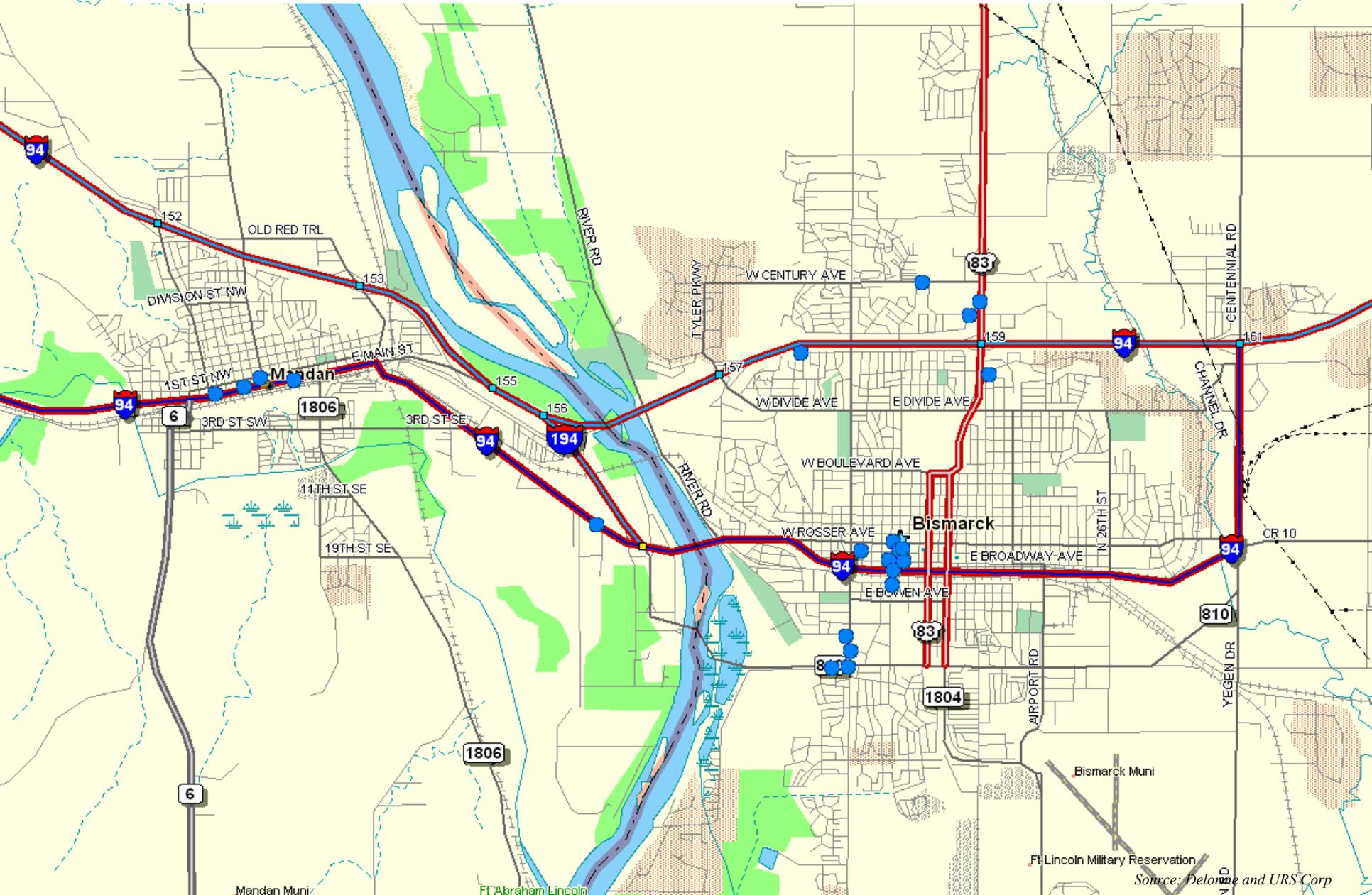


# Map D.2 Retail Trade Area – 100 Miles Bismarck-Mandan, Minot and Fargo

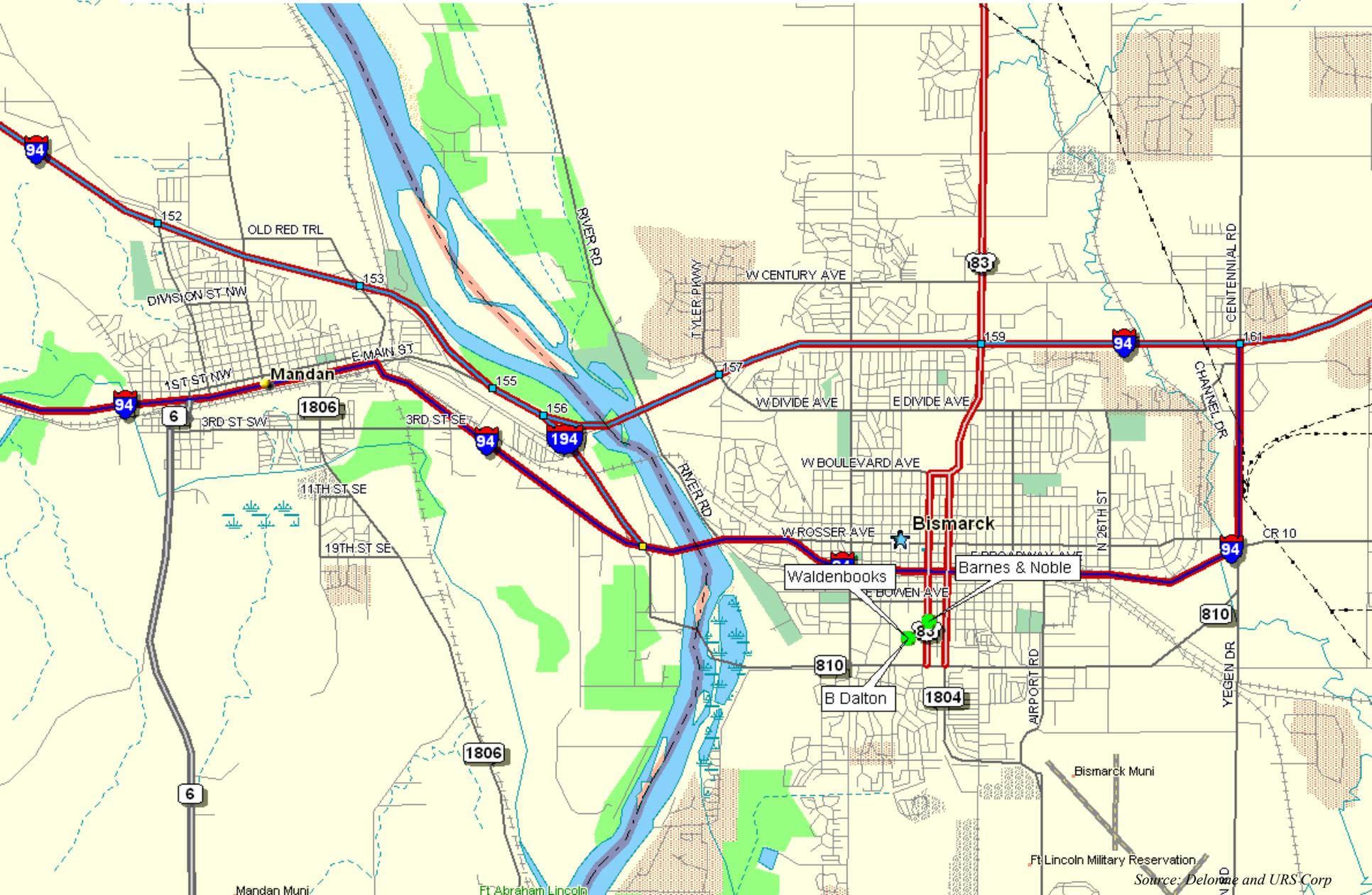




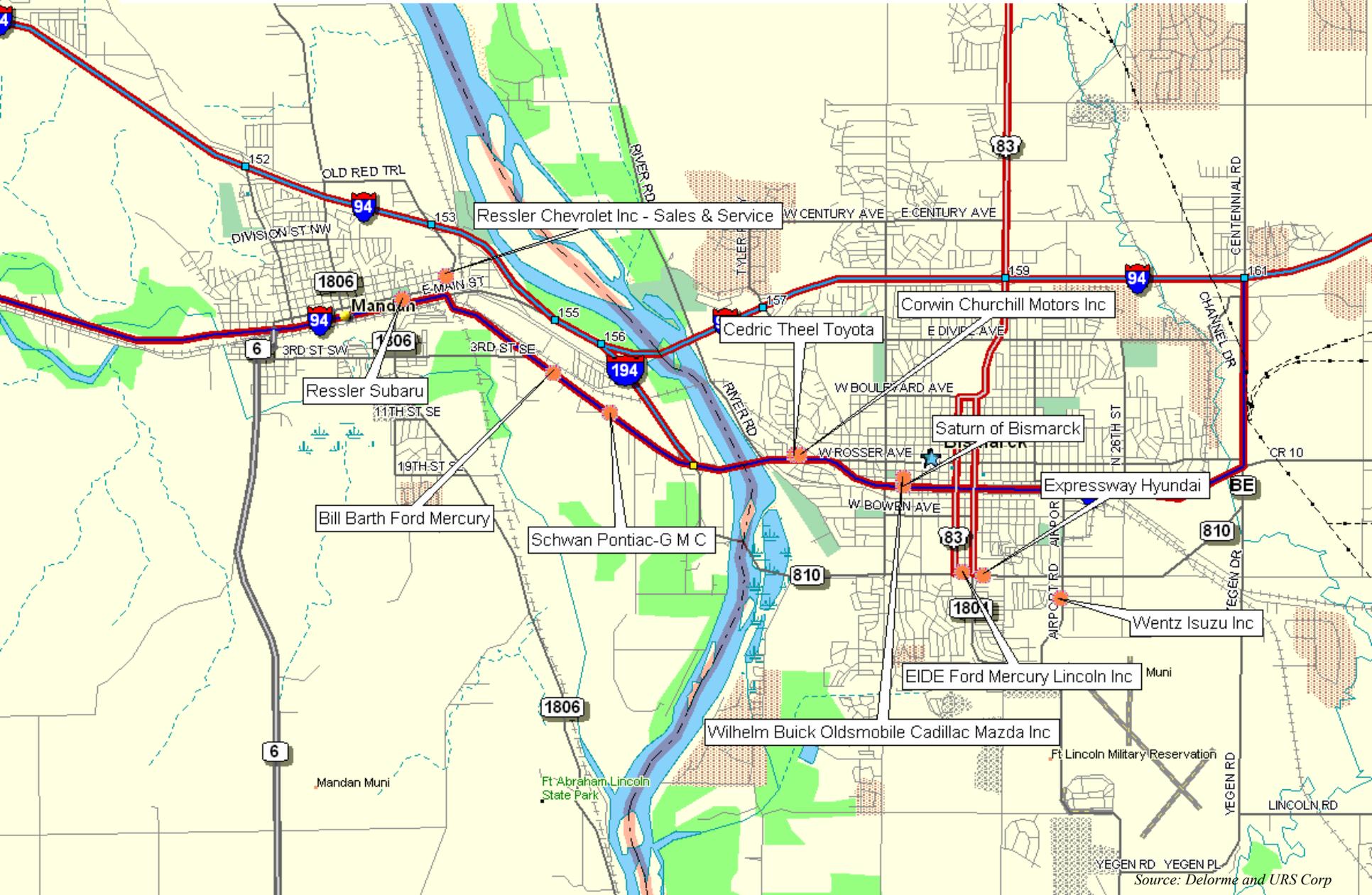
# Map D.4 Bismarck-Mandan Retail Coverage, 10 Mile Area, Banks, 2002



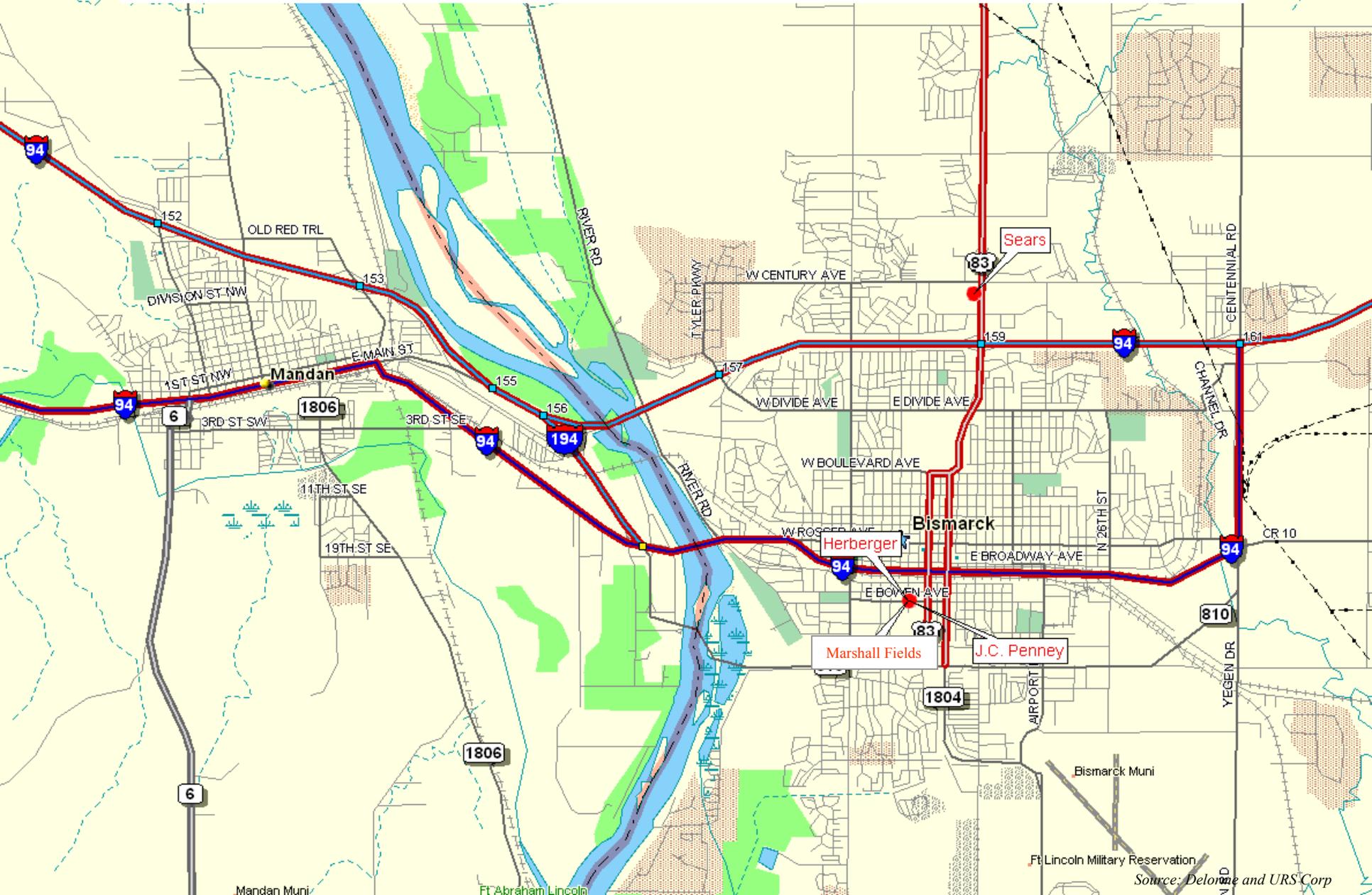
# Map D.5 Bismarck-Mandan Retail Coverage, 10 Mile Area, Book Stores, 2002



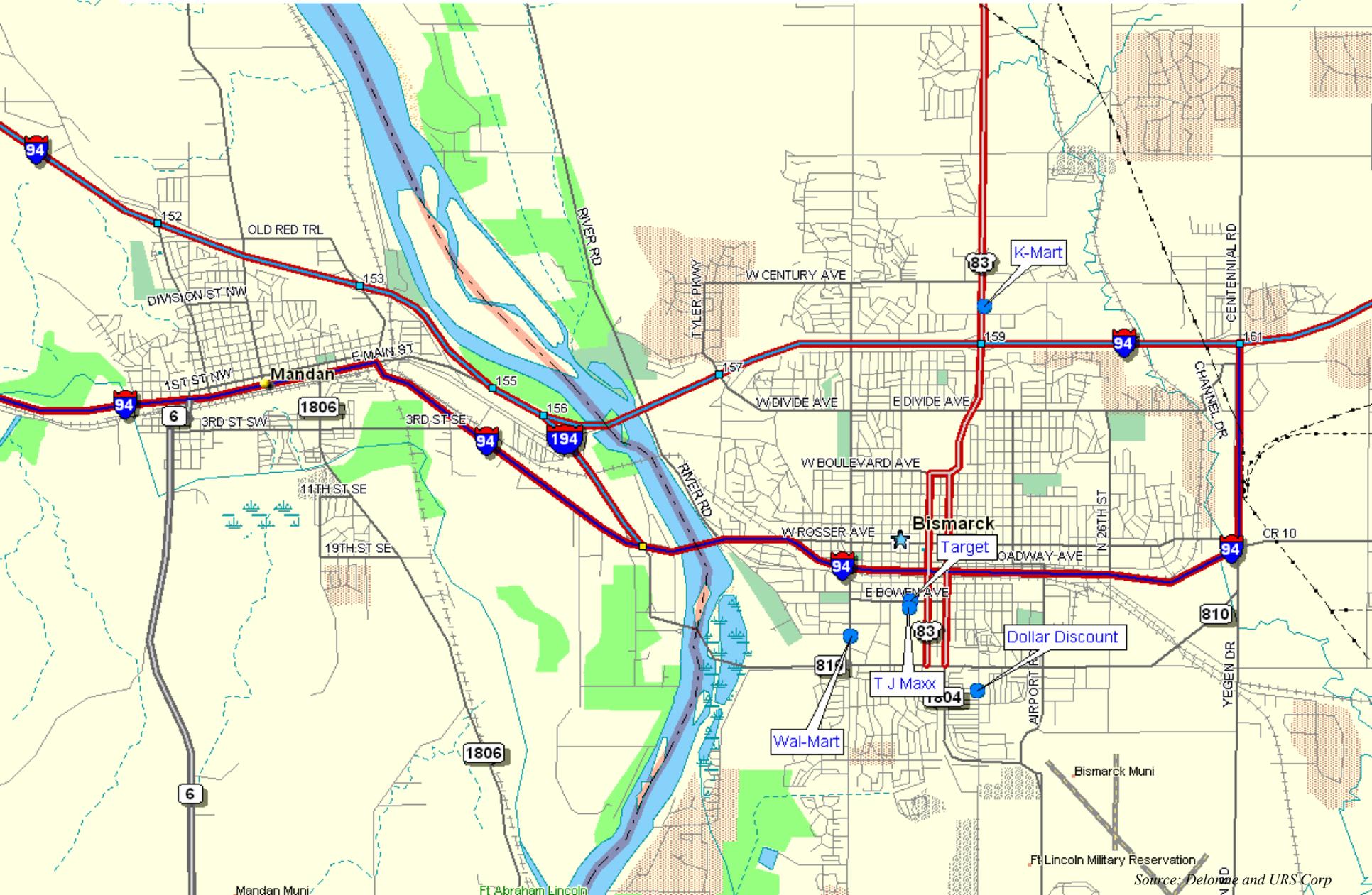
# Map D.6 Bismarck-Mandan Retail Coverage, 10 Mile Area, Car Dealers, 2002



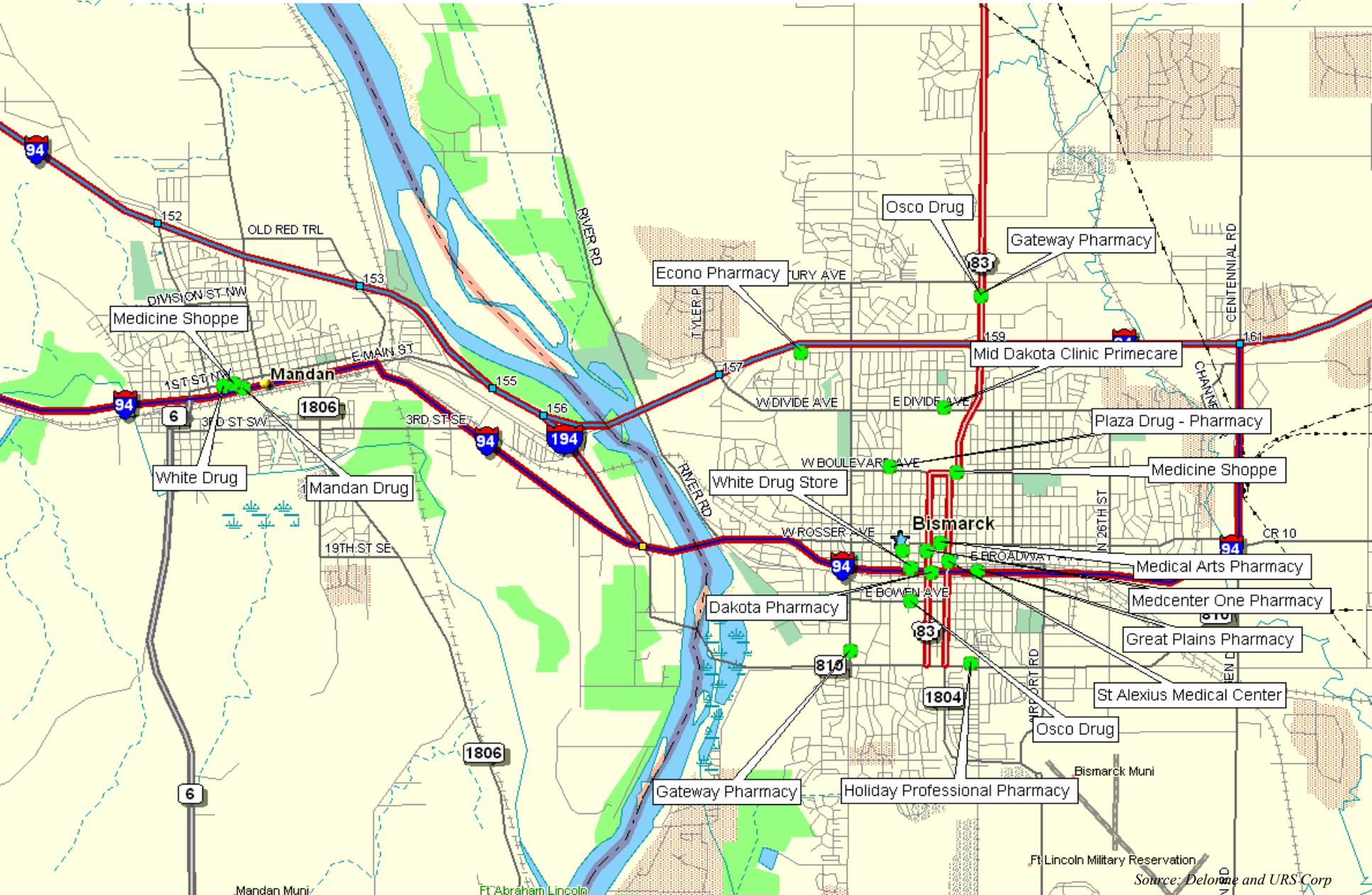
# Map D.7 Bismarck-Mandan Retail Coverage, 10 Mile Area, Department Stores, 2002



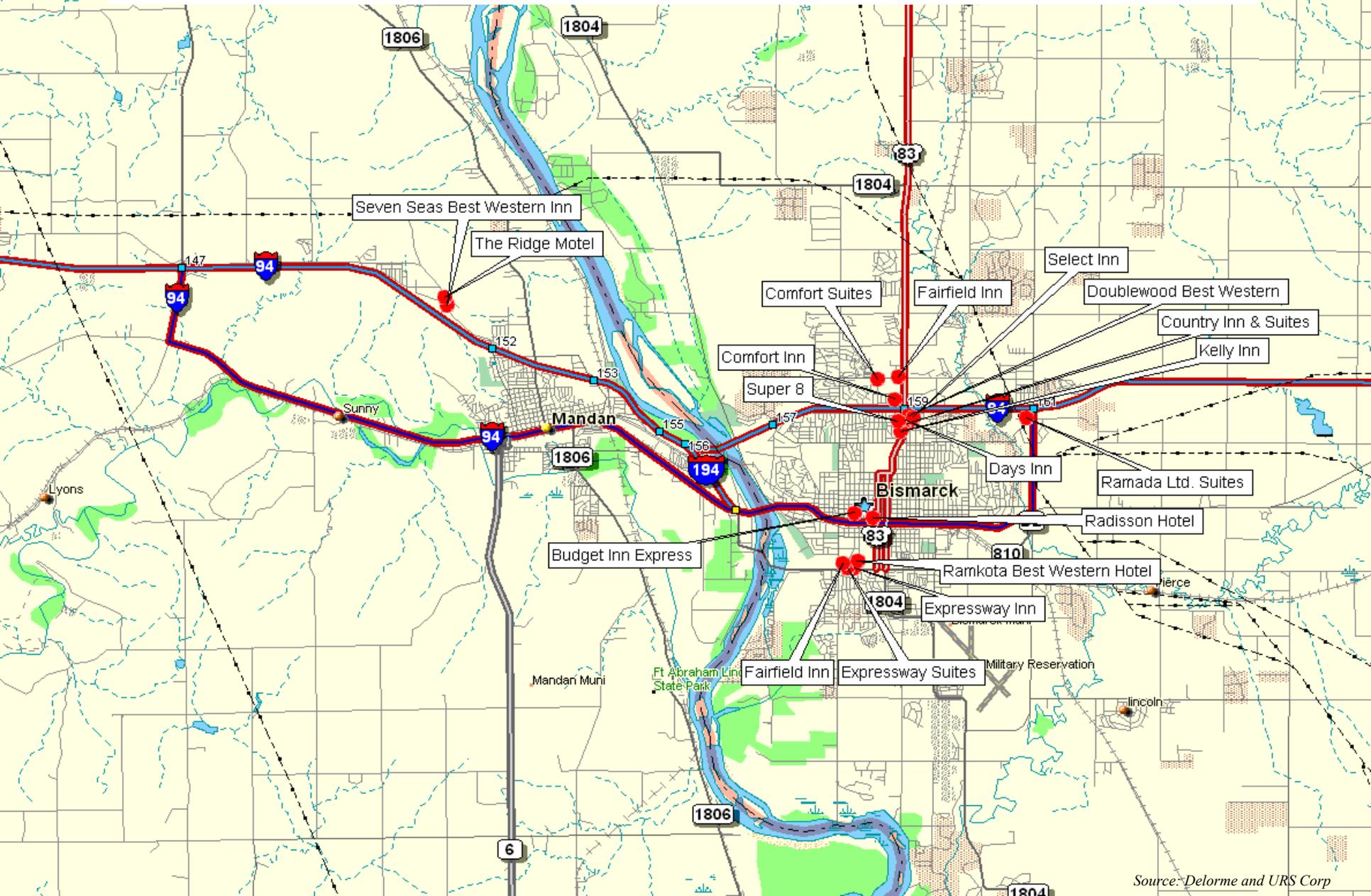
# Map D.8 Bismarck-Mandan Retail Coverage, 10 Mile Area, Discount Stores, 2002



# Map D.9 Bismarck-Mandan Retail Coverage, 10 Mile Area, Drug Stores, 2002



# Map D.10 Bismarck-Mandan Retail Coverage, 10 Mile Area, Hotels, 2002



# Map D.11 Bismarck-Mandan Retail Coverage, 10 Mile Area, Furniture and Electronic Stores, 2002



# Map D.12 Bismarck-Mandan Retail Coverage, 10 Mile Area, Grocery Stores, 2002



# Map D.13 Bismarck-Mandan Retail Coverage, 10 Mile Area, Home and Garden Stores, 2002



# Map D.14 Bismarck-Mandan Retail Coverage, 10 Mile Area, National Office Supply Stores, 2002



# Map D.15 Bismarck-Mandan Retail Coverage, 10 Mile Area, Sport Stores, 2002

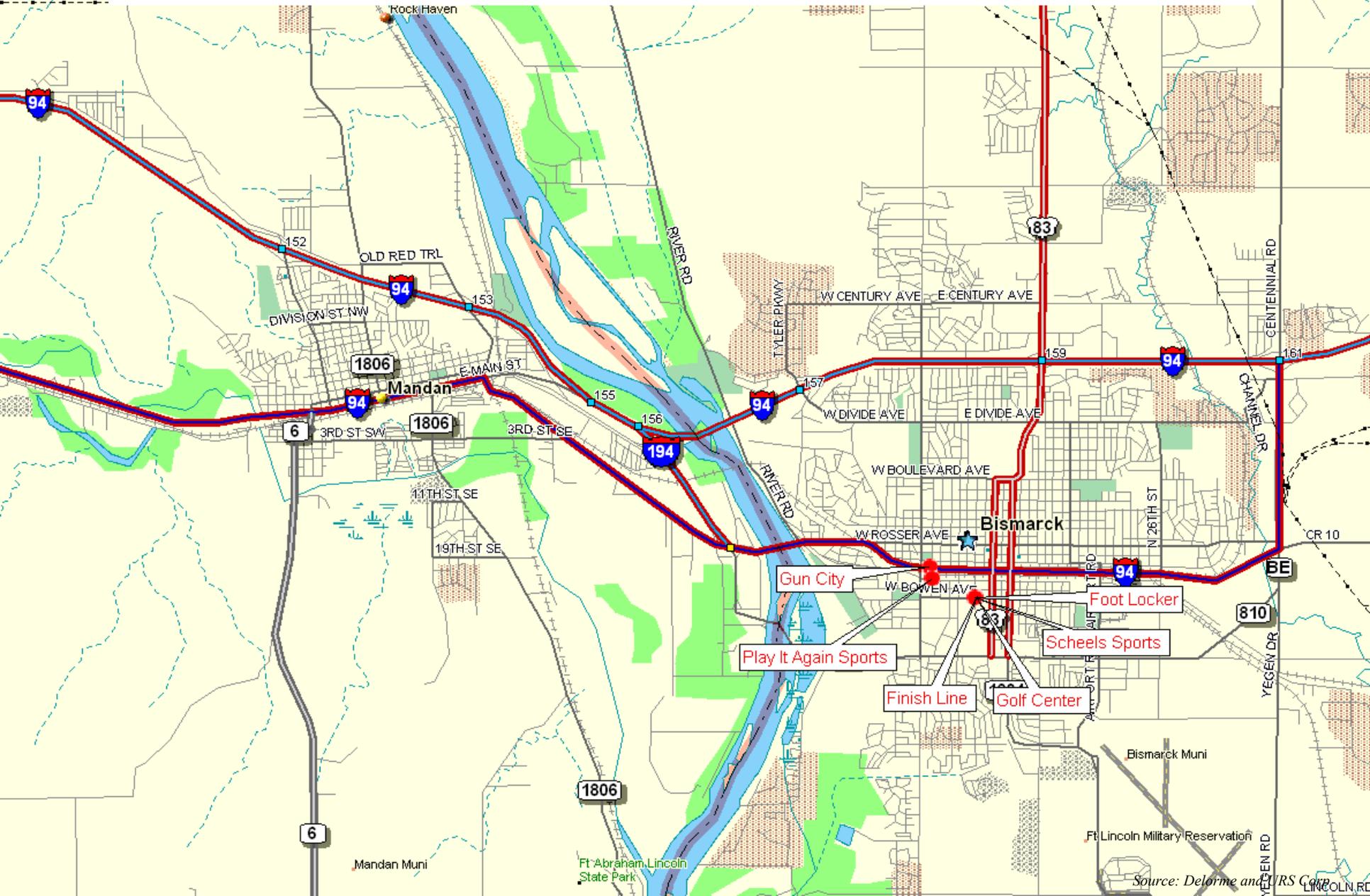


Table D.1  
Taxable Sales and Purchases, Retail Trade Sector (SICs 5200 - 52999),  
Morton County, ND,  
1999 - 2001

SIC	Description	1999	2000	2001	Absolute Change, 1999 - 2001	Average Annual Percentage Change, 1999 - 2001
5211	Lumber Yards	\$9,554,722	\$9,876,561	\$14,884,138	\$5,329,416	24.8%
5261	Nursery, Lawn & Garden	\$336,651	\$349,878	\$340,460	\$3,809	0.6%
5411	Grocery Stores	\$5,967,478	\$6,198,799	\$6,188,093	\$220,615	1.8%
5531	Auto/Home Supply	\$2,544,119	\$2,512,449	\$2,602,302	\$58,183	1.1%
5541	Gasoline Stations	\$8,881,087	\$9,399,639	\$9,908,430	\$1,027,343	5.6%
5712	Furniture	\$2,188,195	\$2,005,608	\$1,927,639	-\$260,556	-6.1%
5812	Restaurants	\$13,221,993	\$13,391,337	\$14,495,879	\$1,273,886	4.7%
5813	Drinking Establishments	\$5,854,832	\$5,989,198	\$6,359,487	\$504,655	4.2%
5912	Pharmacies	\$1,427,526	\$1,495,099	\$1,524,281	\$96,755	3.3%
5921	Liquor Stores	\$2,845,122	\$2,919,868	\$3,214,943	\$369,821	6.3%
5992	Florists	na	na	\$651,847	na	na
	Subtotal	\$52,821,725	\$54,138,436	\$62,097,499	\$9,275,774	8.4%
	Remaining Retail	\$18,106,164	\$18,332,791	\$18,644,751	\$538,587	1.5%
	Grand Total	\$70,927,889	\$72,471,227	\$80,742,250	\$9,814,361	6.7%

Note: Information not available for all sectors due to data disclosure policies

Source: North Dakota Office of Tax Commissioner and URS Corp.

Table D.2  
Taxable Sales and Purchases, Retail Trade Sector (SICs 5200 - 52999),  
Burleigh County, ND,  
1999 - 2001

SIC	Description	1999	2000	2001	Absolute Change, 1999 - 2001	Average Annual Percentage Change, 1999 - 2001
5211	Lumber Yards	\$51,319,719	\$58,082,261	\$66,525,716	\$15,205,997	13.9%
5251	Hardware	\$7,550,947	\$8,058,069	\$9,097,336	\$1,546,389	9.8%
5261	Nursery, Lawn & Garden	\$1,564,493	\$1,543,188	\$1,508,627	-\$55,866	-1.8%
5311	Department Stores	\$152,611,843	\$154,173,151	\$163,004,507	\$10,392,664	3.3%
5411	Grocery Stores	\$19,961,203	\$19,549,803	\$19,620,167	-\$341,036	-0.9%
5531	Auto/Home Supply	\$13,584,083	\$14,401,623	\$16,073,564	\$2,489,481	8.8%
5541	Gasoline Stations	\$19,926,068	\$20,901,441	\$22,414,649	\$2,488,581	6.1%
5621	Women's Clothing	\$8,186,137	\$8,234,935	\$8,294,137	\$108,000	0.7%
5651	Family Clothing	\$19,834,276	\$20,902,749	\$22,279,110	\$2,444,834	6.0%
5661	Shoe Stores	\$4,520,171	\$4,277,134	\$4,256,470	-\$263,701	-3.0%
5712	Furniture	\$14,757,802	\$14,804,690	\$15,970,823	\$1,213,021	4.0%
5713	Floor Covering	\$9,319,280	\$9,711,879	\$9,464,258	\$144,978	0.8%
5722	Household Appliances	\$6,867,082	\$7,209,642	\$6,975,883	\$108,801	0.8%
5732	Radio/TV/Appliances	\$3,746,524	\$3,869,670	\$4,218,572	\$472,048	6.1%
5733	Music/Record Stores	\$2,818,699	\$2,430,352	\$2,284,714	-\$533,985	-10.0%
5812	Restaurants	\$72,182,202	\$74,405,063	\$78,709,355	\$6,527,153	4.4%
5813	Drinking Establishments	\$13,576,366	\$14,013,444	\$14,968,825	\$1,392,459	5.0%
5912	Pharmacies	\$6,693,997	\$6,522,921	\$6,360,170	-\$333,827	-2.5%
5921	Liquor Stores	\$10,642,087	\$11,371,076	\$12,321,809	\$1,679,722	7.6%
5941	Sporting Goods Stores	\$15,722,107	\$17,782,610	\$18,608,840	\$2,886,733	8.8%
5942	Book Stores	\$4,462,473	\$4,748,489	\$4,977,160	\$514,687	5.6%
5944	Jewelry Stores	\$5,483,430	\$5,846,269	\$5,837,407	\$353,977	3.2%
5947	Gift, Novelty, Souvenir	\$8,136,026	\$7,860,301	\$7,659,466	-\$476,560	-3.0%
5992	Florists	\$2,013,722	\$2,127,844	\$2,425,934	\$412,212	9.8%
	Subtotal	\$475,480,737	\$492,828,604	\$523,857,499	\$48,376,762	5.0%
	Remaining Retail	\$64,165,145	\$64,630,687	\$68,408,966	\$4,243,821	3.3%
	Grand Total	\$539,645,882	\$557,459,291	\$592,266,465	\$52,620,583	4.8%

Note: Information not available for all sectors due to data disclosure policies

Source: North Dakota Office of Tax Commissioner and URS Corp.

Table D.3 Per Capita Taxable Sales and Purchases, Retail Trade Sector (SICs 5200 - 52999), Morton and Burleigh Counties, ND, 2000			
SIC	Description	Burleigh County	Morton County
5211	Lumber Yards	\$837	\$390
5251	Hardware	\$116	na
5261	Nursery, Lawn & Garden	\$22	\$14
5311	Department Stores	\$2,221	na
5411	Grocery Stores	\$282	\$245
5531	Auto/Home Supply	\$207	\$99
5541	Gasoline Stations	\$301	\$371
5621	Women's Clothing	\$119	na
5651	Family Clothing	\$301	na
5661	Shoe Stores	\$62	na
5712	Furniture	\$213	\$79
5713	Floor Covering	\$140	na
5722	Household Appliances	\$104	na
5732	Radio/TV/Appliances	\$56	na
5733	Music/Record Stores	\$35	na
5812	Restaurants	\$1,072	\$529
5813	Drinking Establishments	\$202	\$237
5912	Pharmacies	\$94	\$59
5921	Liquor Stores	\$164	\$115
5941	Sporting Goods Stores	\$256	na
5942	Book Stores	\$68	na
5944	Jewelry Stores	\$84	na
5947	Gift, Novelty, Souvenir	\$113	na
5992	Florists	\$31	na
	Subtotal	\$7,100	\$2,140
	Remaining Retail	\$931	\$725
	Grand Total	\$8,031	\$2,864

Note: Information not available for all sectors due to data disclosure policies

Source: North Dakota Office of Tax Commissioner, US Census Bureau and URS Corp.

Table D.4  
Hospitality Facilities,  
Mandan and Bismarck Area, ND,  
2002

Property	The Ridge Motel	Super 8	Seven Seas Best Western Inn	Select Inn	Ramkota Best Western Hotel
Address	2630 Old Red Trail	1124 E. Capitol Ave.	2611 Old Red Trail	1505 Interchange Ave.	800 S. 3rd St.
City	Mandan, ND. 58554	Bismarck, ND. 58501	Mandan, ND. 58554	Bismarck, ND. 58501	Bismarck, ND. 58504
Phone	(701) 663-8686	(701) 255-1314	(701) 663-7401	(701) 223-8060	(701) 258-7700
Number of Rooms:	79	61	103	102	306
Ammenities					
Exercise Room:	No	No	No	No	Yes
Pets Allowed:	Yes	Yes	Yes	Yes	Yes
Continental Breakfast:	No	No	No	Yes	No
Kitchenettes:	No	No	No	No	No
Pool:	No	No	Yes	No	Yes
Meeting Facilities:	No	No	Yes	No	Yes
Group Tour Discount:	No	No	Yes	Yes	Yes
Restaurant:	Yes	No	Yes	No	Yes
Lounge:	Yes	No	Yes	No	Yes
Laundry Services:	Yes	No	No	No	No
Airport Shuttle:	No	No	Yes	No	Yes
Additional Information:	<ul style="list-style-type: none"> <li>• video game room</li> <li>• winter car plug-ins</li> <li>• meeting space for small groups</li> </ul>	<ul style="list-style-type: none"> <li>• bus parking</li> <li>• non-smoking rooms</li> </ul>		<ul style="list-style-type: none"> <li>• restaurant / lounge nearby</li> <li>• senior citizen discount</li> <li>• located near shopping</li> </ul>	<ul style="list-style-type: none"> <li>• convenient location</li> <li>• located across from mall</li> <li>• game room</li> </ul>
Property	Ramada Ltd. Suites	Radisson Hotel	Prairie Knights Casino & Resort	Kelly Inn	Fairfield Inn South
Address	3808 East Divide Ave.	605 E. Broadway & 6th Street	7932 Hwy 24	1800 N. 12th St.	135 Ivy Drive
City	Bismarck, ND. 58501	Bismarck, ND. 58501	Fort Yates, ND. 58538	Bismarck, ND. 58501	Bismarck, ND. 58504
Phone	(701) 221-3030	(701) 255-6000	(701) 854-7777	(701) 223-8001	(701) 223-9293
Number of Rooms:	66	215	96	101	63
Ammenities					
Exercise Room:	Yes	Yes	No	No	No
Pets Allowed:	No	Yes	No	Yes	No
Continental Breakfast:	Yes	No	No	No	Yes
Kitchenettes:	No	Yes	No	Yes	No
Pool:	Yes	Yes	No	Yes	Yes
Meeting Facilities:	No	Yes	Yes	Yes	No
Group Tour Discount:	No	Yes	No	Yes	Yes
Restaurant:	No	Yes	Yes	Yes	No
Lounge:	No	Yes	Yes	Yes	No
Laundry Services:	No	Yes	No	No	No
Airport Shuttle:	No	Yes	No	Yes	No
Additional Information:	<ul style="list-style-type: none"> <li>• jacuzzi suites</li> </ul>	<ul style="list-style-type: none"> <li>• convenient downtown location, walking distance to mall</li> <li>• Covered parking in parking ramp</li> </ul>	<ul style="list-style-type: none"> <li>• Gaming and entertainment located 46 miles south of Mandan on the Standing Rock Reservation</li> <li>• Hunters Club restaurant and the Feast of the Rock buffet also on site</li> <li>• Four suites with whirlpool bath and king sized beds</li> </ul>	<ul style="list-style-type: none"> <li>• winter car plug-ins</li> <li>• full catering and banquet facilities</li> <li>• close to shopping</li> </ul>	<ul style="list-style-type: none"> <li>• located near shopping, restaurant / lounge</li> <li>• fax and copy service</li> <li>• Marriot rewards program</li> <li>• same day valet service</li> </ul>

Table D.4 (continued)  
 Hospitality Facilities,  
 Mandan and Bismarck Area, ND,  
 2002

Property	Fairfield Inn North	Expressway Suites	Expressway Inn	Comfort Inn	Doublewood Best Western
Address	1120 Century Ave.	180 East Bismarck Expy.	3rd St. & 200 E. Bismarck Expy.	1030 Interstate Ave.	1400 E. Interchange Ave.
City	Bismarck, ND. 58503	Bismarck, ND. 58504	Bismarck, ND. 58504	Bismarck, ND. 58501	Bismarck, ND. 58501
Phone	(701) 223-9077	(701) 222-3311	(701) 222-2900	(701) 223-1911	(701) 258-7000
Number of Rooms:	63	64	163	148	143
Ammenities					
Exercise Room:	No	Yes	No	No	No
Pets Allowed:	No	No	Yes	Yes	Yes
Continental Breakfast:	Yes	Yes	Yes	Yes	No
Kitchenettes:	No	No	No	No	No
Pool:	Yes	Yes	Yes	Yes	Yes
Meeting Facilities:	No	Yes	No	Yes	Yes
Group Tour Discount:	Yes	Yes	Yes	Yes	Yes
Restaurant:	No	No	No	No	Yes
Lounge:	No	Yes	No	Yes	Yes
Laundry Services:	No	Yes	Yes	No	No
Airport Shuttle:	No	Yes	Yes	No	Yes
Additional Information:	<ul style="list-style-type: none"> <li>• located near shopping, restaurants / lounge</li> <li>• fax and copy service</li> <li>• Marriot rewards program</li> <li>• same day valet service</li> <li>• free local phone calls</li> </ul>	<ul style="list-style-type: none"> <li>• Executive &amp; Honeymoon Suites</li> <li>• winter car plug-ins</li> <li>• every room has computer data ports, fridge, microwave, coffeemaker</li> <li>• across the street from mall, three blocks from Civic Center, close to restaurants</li> <li>• meeting rooms for groups up to 50 people</li> </ul>	<ul style="list-style-type: none"> <li>• within walking distance to restaurants / lounge</li> <li>• game room and playground</li> <li>• swimming spa and outdoor pool</li> <li>• executive meeting suites and minisuites</li> <li>• computer data ports in every room</li> <li>• free continental breakfast</li> </ul>	<ul style="list-style-type: none"> <li>• restaurants &amp; lounge nearby</li> </ul>	
Property	Days Inn	Country Inn & Suites	Comfort Suites	Budget Inn Express	
Address	1300 E. Capitol Ave.	3205 North 14th St.	929 Gateway Ave.	2nd St. & 122 E. Thayer Ave.	
City	Bismarck, ND. 58501	Bismarck, ND. 58501	Bismarck, ND. 58501	Bismarck, ND. 58501	
Phone	(701) 223-9151	(701) 258-4200	(701) 223-4009	(701) 255-1450	
Number of Rooms:	110	76	60	58	
Ammenities					
Exercise Room:	No	Yes	Yes	No	
Pets Allowed:	Yes	No	No	Yes	
Continental Breakfast:	Yes	Yes	Yes	Yes	
Kitchenettes:	No	No	No	Yes	
Pool:	Yes	Yes	Yes	No	
Meeting Facilities:	No	Yes	No	No	
Group Tour Discount:	Yes	Yes	No	Yes	
Restaurant:	No	No	No	No	
Lounge:	No	No	No	No	
Laundry Services:	No	Yes	No	No	
Airport Shuttle:	No	Yes	Yes	No	
Additional Information:	<ul style="list-style-type: none"> <li>• restaurant / lounge nearby</li> </ul>	<ul style="list-style-type: none"> <li>• indoor pool with 150-ft. triple loop waterslide</li> <li>• childrens play pool</li> <li>• located within walking distance of theaters, restaurants, and shopping mall</li> </ul>	<ul style="list-style-type: none"> <li>• Indoor pool with a 97 ft. waterslide</li> <li>• computer data ports in every room</li> <li>• next door to Gateway Mall and numerous restaurants</li> <li>• frequent stay program</li> </ul>	<ul style="list-style-type: none"> <li>• senior citizen discounts</li> <li>• outdoor pool</li> <li>• restaurant/lounge nearby</li> </ul>	

Source: Individual Properties, Bismarck Mandan Convention and Visitors Bureau and URS Corporation

Table E.1  
List of Companies and Individuals Interviewed,  
Winter 2002

Company <sup>1</sup>	Name <sup>1</sup>
<b>Developers/Brokers</b>	
Aspen Group	Matthew Beichert
Century 21 Landmark, Bismarck	Barb Orr
Century 21 of Mandan	Karen Fleck
Century 21 of Mandan	Wade Bachmeier
Cook Construction	Mike Cook
Home Depot	Tim Platt
Kirkwood Mall	Paul Schabel
Kohl's Department Store	
Lewis & Clark Community Works	Sherri Arenz, Housing Program Director
Local Real Estate Broker	Pat Maddock
Lowes	Patrick Herrion
Main and Co. Realtors	John Myers
MetroPlains Development, St. Paul MN	Gary Stenson
Mitzel Builders	Lee Mitzel
Pinnacle Development	Bill Shalhoob
Private Developer	Al Leingang
Private Developer	Charles Schaeffbauer
Private Developer	Mike Wachter
Private Developer	Perry Schlosser
RSTS	Lou Bond
<b>Education/Institutions</b>	
Bismarck Art & Galleries Association	Linda Christman, Director
Bismarck Mandan Chamber of Commerce	Dave McIver, President/CEO
Bismarck Mandan Development Authority	Russ Staiger, President/CEO
Bismarck State College	Dr. Thigpen, President
City of Madnan Parks Department	Cole Higlin, President
City of Mandan	Dan Ulmer, Commissioner
City of Mandan	Francis Schwindt
City of Mandan	Jim Neubauer, City Administrator
City of Mandan	Mark Bitz, Commissioner
City of Mandan	Richard L. Barta, City Assessor, Building Official
City of Mandan	Stan Scott, Commissioner
Ford Abraham Lincoln Center	Tracy Potters, Director
Mandan Growth Fund	Tim Spillman
Missouri Valley YMCA	Andy Dahl, Director
North Dakote Dept. of Health/ Waste Management	D. Wayne Kern, Director
North Dakote Dept. of Health/ Waste Management	Gary Berreth, Manager
North Dakote Dept. of Health/Environmental Health	David Glatt, Chief
University of Mary	Sister Thomas Welder, President
US Department of Housing and Urban Development	Joel Manske, Senior Community Builder
Wells Fargo	Todd Steinwand

Table E.1 continued  
List of Companies and Individuals Interviewed,  
Winter 2002

Company <sup>1</sup>	Name <sup>1</sup>
<b>Native American Indian Community</b>	
ND Rural Development Council	Cornelius Grant, Director
North Dakota Indian Affairs Commission	Cherly Kulas, Executive Director
United Tribes, North Dakota/South Dakota	Breck Maxon, Director
Native Business Center	
<b>Major Employers</b>	
Bobcat/Ingersoll, Bismarck	Mike Seifert
Laducer and Associates	James Laducer, President
Medcenter One Health Systems	James Cooper, President/CEO
NISC	Vern Dosch, President/CEO
St. Alexius Center	Richard Tschider, President/CEO
<b>Local Businesses</b>	
Bill Barth Ford Mercury	Bill Barth, President
Five Arts Nation	Wanita Schanandore, Manager
For the Birds & More	Todd Henson, Owner
Mandan Western Shop	Mark Mosbrucker, Owner
Marv's Hardware	Bruce Joersz, Owner
<b>Residential Developments</b>	
Alberta Heights Apartments	
Brandon Heights	
Cottonwood Apartments	
Edgewood Vista	
Kirkwood Manor Apartments	
North Pointe Apartments	
PrimRose Retirement Center	
Terrace Pointe Apartments	
Turnpike Apartments	
Waterford on West Century, Retirement Community	Kathy Schmidt, Director of Marketing
Westwood Park Apartmetns	
<b>Hotels / Convention Space</b>	
Bismarck Civic Center	
Bismarck Mandan Convention and Visitors Bureau	
Bismarck Radisson	
Ramkota Best Western, Bismarck	
Seven Seas Inn and Conference Center	
<b>Other Data</b>	
Bismarck Tribune	David Braton
North Dakota Tax Department	Kathy Strombeck

Notes: <sup>1</sup> Select Companies and Individuals are not listed due to confidentiality claims

**MANDAN COMMUNITY CENTER, MANDAN, NORTH DAKOTA  
SCHEDULE OF 2003 BOOKED EVENTS IN GYMNASIUM AS OF DECEMBER 2002**

JANUARY 1	CLOSED HAPPY NEW YEAR
JANUARY 4	
JANUARY 5	
JANUARY 10	SWAP MEET SET-UP
JANUARY 11	SWAP MEET
JANUARY 12	SWAP MEET
JANUARY 17	GUN SHOW SET-UP
JANUARY 18	GUN SHOW
JANUARY 19	GUN SHOW
JANUARY 24	QUILTING DEMO SET-UP 5:00P.M.
JANUARY 25	QUILTING DEMO
JANUARY 31	FLEA MARKET SETUP
FEBRUARY 1	FLEA MARKET
FEBRUARY 2	FLEA MARKET
FEBRUARY 8	WINTER DAZE VOLLEYBALL TOURNAMENT
FEBRUARY 9	WINTER DAZE VOLLEYBALL TOURNAMENT
FEBRUARY 15	
FEBRUARY 16	
FEBRUARY 21	AUCTION SET-UP
FEBRUARY 22	AUCTION
FEBRUARY 28	FLEA MARKET SET-UP
MARCH 1	FLEA MARKET
MARCH 2	FLEA MARKET
MARCH 8	
MARCH 9	
MARCH 15	
MARCH 16	
MARCH 19	AG DAY SET-UP 9:00P.M.
MARCH 20	AG DAY
MARCH 21	SPRING CRAFT FAIR SET-UP
MARCH 22	SPRING CRAFT FAIR
MARCH 23	SPRING CRAFT FAIR
MARCH 27	SNAP-ON TOOLS DEMO
MARCH 29	
MARCH 30	
APRIL 1	NEW HOLLAND DEMO
APRIL 2	NEW HOLLAND DEMO
APRIL 3	JOB SERVICE JOB FAIR
APRIL 5	
APRIL 6	
APRIL 10	MANDAN ART SHOW
APRIL 11	MANDAN ART SHOW
APRIL 12	MANDAN ART SHOW
APRIL 19	
APRIL 20	
APRIL 23	TASTE OF HOME COOKING
APRIL 26	GARAGE SALE-ASA
MAY 2	FLEA MARKET SET-UP
MAY 3	FLEA MARKET
MAY 4	FLEA MARKET
MAY 10	
MAY 11	
MAY 17	WEDDING
MAY 18	

**MANDAN COMMUNITY CENTER, MANDAN, NORTH DAKOTA  
 SCHEDULE OF 2003 BOOKED EVENTS IN GYMNASIUM AS OF DECEMBER 2002, PAGE 2**

MAY 24	
MAY 25	
MAY 31	
JUNE 1	
JUNE 6	WEDDING
JUNE 7	WEDDING
JUNE 8	
JUNE 14	WEDDING
JUNE 15	
JUNE 20	WEDDING
JUNE 21	WEDDING
JUNE 22	
JUNE 27	WEDDING
JUNE 28	
JUNE 29	
JULY 5	
JULY 6	
JULY 12	
JULY 13	
JULY 19	
JULY 20	
JULY 26	
JULY 27	
AUGUST 2	WEDDING
AUGUST 3	
AUGUST 9	
AUGUST 10	
AUGUST 16	
AUGUST 17	
AUGUST 19-23	HOMIER TOOL SALE
AUGUST 24	
AUGUST 30	WEDDING
AUGUST 31	
SEPTEMBER 5	FLEA MARKET SET-UP
SEPTEMBER 6	FLEA MARKET
SEPTEMBER 7	FLEA MARKET
SEPTEMBER 13	WEDDING
SEPTEMBER 14	
SEPTEMBER 19	GEM & MINERAL SHOW
SEPTEMBER 20	GEM & MINERAL SHOW
SEPTEMBER 20	GARAGE SALE-ASA
SEPTEMBER 21	GEM & MINERAL SHOW
SEPTEMBER 26	GUN SHOW SET-UP
SEPTEMBER 27	GUN SHOW
SEPTEMBER 28	GUN SHOW
OCTOBER 3	FLEA MARKET SET-UP
OCTOBER 4	FLEA MARKET
OCTOBER 5	FLEA MARKET
OCTOBER 11	
OCTOBER 12	
OCTOBER 17	FALL CRAFT FAIR SET-UP
OCTOBER 18	FALL CRAFT FAIR
OCTOBER 19	FALL CRAFT FAIR
OCTOBER 25	TAEKWONDO TOURNAMENT

**MANDAN COMMUNITY CENTER, MANDAN, NORTH DAKOTA  
SCHEDULE OF 2003 BOOKED EVENTS IN GYMNASIUM AS OF DECEMBER 2002, PAGE 3**

OCTOBER 26	
OCTOBER 31	FLEA MARKET SET-UP
NOVEMBER 1	FLEA MARKET
NOVEMBER 2	FLEA MARKET
NOVEMBER 8	
NOVEMBER 9	
NOVEMBER 15	
NOVEMBER 16	
NOVEMBER 22	
NOVEMBER 23	
NOVEMBER 29	
NOVEMBER 30	VOLLEYBALL TOURNAMENT
DECEMBER 6	FLEA MARKET
DECEMBER 7	FLEA MARKET
DECEMBER 12	CHRISTMAS CRAFT FAIR SET-UP
DECEMBER 13	CHRISTMAS CRAFT FAIR
DECEMBER 14	CHRISTMAS CRAFT FAIR
DECEMBER 20	
DECEMBER 21	
DECEMBER 24	COMMUNITY CENTER CLOSES AT 4:00
DECEMBER 25	CLOSED MERRY CHRISTMAS
DECEMBER 27	
DECEMBER 28	
DECEMBER 31	SINGLE FILE DANCE
JANUARY 1	CLOSED HAPPY NEW YEAR

Source: Mandan Community Center, Mandan North Dakota

**Table 3.4**  
**Gateway Mall Tenants, August 2002, I-94 & Hwy**  
**83 North, Bismarck, North Dakota**

<b>Store Number</b>	<b>Store Name</b>
A-1	Vacant
A-2	Mid Dakota Clinic Prime Care
A-3	Great plains Health Company
A-4	Center for Integrated Medicine
A-5	Unassigned
B	Vacant
C	Oscro Drug
D	Sears
D-2	Sears Optical
D-3	Sears Miracle Ear
D-1	Sears Automotive
E	Carmike 8 Cinemas
F-1a	Spherion
F-1b	Planet Cellular
F-2	The Old Attic
F-3	Mastercuts
F-4	Vacant
F-5	Bath & Body Works
F-6/9	Joy's Hallmark
F-7	Vacant
F-8	Vacant
F-10	Subway
F-11	Vacant
F-12	Candy, Cones, & More
F-13	House of Sound
G-6&7	Rock'N 50's Café
H-1	Great Dragon Chinese Buffet
H-6	RadioShack
H-7	Vacant
J-1	Pretzelmaker
J-2	Rings Etc.
J-3/4	Rainbow Outlet
K-1	Regis Hairstylists
K-2	Mocha Mommas Coffee Beanery
K-3	Dollar Store
K-4	Gateway to Science Center
L-1/5	Gateway Fellowship Church
M-1	Junique's
M-2	Vacant
M-3	Hansen's Mens wear
M-4	Vacant
M-5	Only Nails
Outlots	
1	Perkins Family Restaurant
2A	Paradiso
2B/3A	Burger King
3B	Kentucky Fried Chicken
4	Gate City bank

Source: Gateway mall and URS Corporation

**Table 3.5**

**Kirkwood Mall Tenants, January 2003, 7th Street & Bismarck Expressway, Bismarck, ND**

**Department Stores**

Herberger's  
JCPenney  
Marshall Fields  
Target  
TJMaxx

I Keating Furniture World coming Spring 2003

**Music/Electronics**

Fye  
Radio Shack  
Rex's TV  
Sam Goody  
Software Etc.  
Suncoast Motion Picture

**Athletic Wear**

Finishline  
Footlocker  
Lady Footlocker  
Scheels All Sports

**Photography**

Photo Express  
Ritz Camera

**Books**

Maxwell's & Max Jrs.  
Waldenbooks

**Services**

AAA Travel Agency  
Century 21  
Gartner's Cobblery  
Kirkwood Bank & Trust  
Kirkwood Family Denistry  
Kirkwood Postal Station  
Mid Dakota Clinic  
Sterling Optical  
Super Shoe Shine  
Vista Optical

**Cards/Gifts**

Joy's Hallmark  
Lee's Hallmark Gold Crown  
Prairie Peddler  
Spencer Gifts  
Stabo Scandinavian Imports  
Wild Things Gallery

**Shoes**

Casual Corner  
Finishline  
Footlocker  
Lady Footlocker  
Naturalizer  
Payless Shoe Source  
Tradehome

**Food/Beverage/Candy**

Arby's  
Deli N'Yogurt  
Fanny Farmer  
Grizzly's Grill N'Saloon  
Maxwell's & Max Jrs.  
McDonald's  
Orange Julius/KarmelKorn  
Prairie Peddler  
Pretzelmaker  
Subway

**Specialty/Miscellaneous**

EarthPantry  
General Nutrition center  
K-B Toys  
Stabo Scandinavian Imports  
Wild Things Gallery  
Wireless Concepts

**Hair/Beauty**

Bath & Body Works  
City Looks  
Foxy Nails  
Master Cuts  
Merle Norman  
Regis salon  
System Seven

**Women's Apparel**

American Eagle  
The Buckle  
Casual Corner  
Christopher & banks  
Deb Shop  
Eddie Bauer  
Lane Bryant  
Maurices  
Motherhood Maternity  
Originals Casual wear  
Pacific Sunwear  
Petite Sophisticate  
RCC Western Store  
Vanity  
Victoria's Secret  
Wilson's Leather

**Jewelry/Accessories**

Afterthoughts  
Antique & Coin Exchange  
Claire's Boutique  
Riddle's  
Walkers N'Daughters Jewelers  
Zales Jewelers

**Men's Apparel**

American eagle  
The Buckle  
Eddie Bauer  
Maurices  
Pacific Sunwear  
RCC Western Store  
Wilson's Leather