

# North Dakota Military Force Structure

## FY18 Economic Impact Analysis



Prepared by NGND-PFO-IR

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## **FY 18 North Dakota Military Force Structure Economic Impact Analysis**

### **Methodology / Availability of Information**

The Economic Impact Analysis (EIA) provides unclassified key information about the resources and economic impact of the military on the State of North Dakota.

In fiscal year (FY) 2018 Military organizations employed 13,555 people and created about 3,766 indirect jobs in North Dakota. Annual payroll for military employees is approximately \$682.8M and indirect salaries are approximately \$183.5M. The military also has direct expenses for construction, services, materials, equipment and supplies of \$211.8M. Total military economic impact in North Dakota for Fiscal Year 2018 was estimated at about \$1.08B.

The total economic impact of the military in North Dakota is calculated by totaling annual payroll, annual expenditures and estimated dollar value of indirect jobs created. The economic area for this report is the State of North Dakota. The indirect job multipliers were obtained from LMI Economic Impact database, Installations and Indirect/Induced Multipliers, Feb 95. The average annual pay for North Dakota was obtained from the North Dakota Workforce Intelligence, a statistics web site using State labor information from the 1st quarter of 2018. This program analysis was prepared within the parameters of the Office of the Secretary of Defense's economic impact analysis model. The funding sources used in this analysis are Appropriated Funds (AFP), Non-Appropriated Funds (NAF) and State Military Funds. Some figures were estimates based on known factors and are identified in the report. The Active Duty information was obtained from the Annual Economic Impact Analysis for the Grand Forks and Minot Air Force bases and information provided by Armed Forces Recruiting Stations.

National Guard is made up of North Dakota Army and Air National Guard units. Active Duty is made up of the Air Force bases at Minot and Grand Forks and the Armed Forces recruiting stations for Air Force, Army, Marines and Navy. The Reserves are made up of the Air Force at Minot; the Army at Bismarck, Fargo and Grand Forks; the Marines at Wahpeton and the Navy at Fargo.

Information contained in this analysis is for the period 01 Oct 17 through 30 Sep 18 (Fiscal year 2018). The report is broken down by location (Tables 1-5) and military component (Tables 6-11). The information for this analysis was collected and compiled by NGND-PFO-IR.

## FY 18 North Dakota Military Force Structure Economic Impact Analysis

**TABLE 1**

**PERSONNEL BY CLASSIFICATIONS (By Location)**

	<u><b>National Guard</b></u>	<u><b>Active Duty</b></u>	<u><b>Reserve**</b></u>	<u><b>Total</b></u>
<b>1. Military Appropriated</b>				
Bismarck/Mandan	947	13	52	1,012
Fargo/West Fargo	1,564	18	193	1,775
Grand Forks	307	1,621	16	1,943
Minot	276	5,338	17	5,630
Other	929		57	986
Total	<b>4,023</b>	<b>6,990</b>	<b>335</b>	<b>11,348</b>
<b>2. Dependents</b>				
Bismarck/Mandan	1,456	16	75	1,547
Fargo/West Fargo	1,929	22	253	2,204
Grand Forks	273	1,483	22	1,778
Minot 1	374	6,057	22	6,453
Other	1,158		74	1,232
Total	<b>5,190</b>	<b>7,578</b>	<b>446</b>	<b>13,214</b>
<b>3. Civilian Appropriated</b>				
Bismarck/Mandan	222		6	228
Fargo/West Fargo	196		3	199
Grand Forks	11	373	1	385
Minot	9	514		523
Other	58			58
Excepted technicians included in part 1 *	(460)			(460)
Total	<b>36</b>	<b>887</b>	<b>10</b>	<b>933</b>
<b>4. Other</b>				
Bismarck/Mandan	89			89
Fargo/West Fargo	57			57
Grand Forks	4	562		566
Minot	5	501		506
Other	56			56
Total	<b>211</b>	<b>1,063</b>		<b>1,274</b>
Total Personnel and Dependents	<b>9,460</b>	<b>16,518</b>	<b>791</b>	<b>26,769</b>

\*Some National Guard Civilians are also military members and are included with the Appropriated Civilians, therefore not added into the total personnel.

\*\*The number of dependents for Reserve was estimated, using the National Guard military member to dependent ratio.

## FY 18 North Dakota Military Force Structure Economic Impact Analysis

**TABLE 2**  
**ANNUAL PAYROLL BY CLASSIFICATION (By Location)**

	<u>National Guard</u>	<u>Active Duty</u>	<u>Reserve</u>	<u>Total</u>
<b>1. Military Appropriated</b>				
Bismarck/Mandan	\$40,988,204	\$905,876	\$450,337	\$42,344,417
Fargo/West Fargo	46,502,363	896,836	2,121,222	49,520,421
Grand Forks	7,234,829	95,254,866	118,718	138,701,382
Minot	9,831,397	305,456,919	973,157	316,261,473
Other	16,490,050		773,135	17,263,185
Total	<b>\$121,046,843</b>	<b>\$402,514,497</b>	<b>\$4,436,569</b>	<b>\$527,997,909</b>
<b>2. Civilian Appropriated</b>				
Bismarck/Mandan	\$23,707,040		\$382,187	\$24,089,227
Fargo/West Fargo	17,532,743		100,786	17,633,529
Grand Forks	975,929	29,936,521	46,879	30,959,329
Minot	993,128	43,678,487		44,671,615
Other	5,050,002			5,050,002
Total	<b>\$48,258,842</b>	<b>\$73,615,008</b>	<b>\$529,852</b>	<b>\$122,403,702</b>
<b>3. Other</b>				
Bismarck/Mandan	\$6,151,686			\$6,151,686
Fargo/West Fargo	3,755,038			6,755,038
Grand Forks	343,786	6,096,219		6,440,005
Minot	420,051	11,324,099		11,744,150
Other	4,355,212			4,355,212
Total	<b>\$15,025,773</b>	<b>\$17,420,318</b>		<b>\$32,446,091</b>
<b>4. Total Annual Payroll</b>				
Bismarck/Mandan	\$70,846,930	\$905,876	\$832,524	\$72,585,330
Fargo/West Fargo	67,790,144	896,836	2,222,008	70,908,988
Grand Forks	8,554,544	131,287,606	165,597	140,007,747
Minot	11,244,576	360,459,505	973,157	372,677,238
Other	25,895,264		773,135	26,668,399
	<b>\$184,331,458</b>	<b>\$493,549,823</b>	<b>\$4,966,421</b>	<b>\$682,847,702</b>

National Guard and Army Reserve payroll included deployed soldiers.

## FY 18 North Dakota Military Force Structure Economic Impact Analysis

**TABLE 3**  
**EXPENDITURES FOR CONSTRUCTION, SERVICES, AND PROCUREMENT OF**  
**MATERIALS, EQUIPMENT AND SUPPLIES (By Location)**

	<u>National Guard</u>	<u>Active Duty</u>	<u>Reserve*</u>	<u>Total</u>
<b>1. Construction</b>				
Bismarck/Mandan				
Fargo/West Fargo	\$6,013,418			\$6,013,418
Grand Forks		11,983,543		11,983,543
Minot		34,578,000		34,578,000
Other	(28,761)			(28,761)
	<b>\$5,984,657</b>	<b>\$46,561,543</b>		<b>\$52,546,200</b>
<b>2. Services, Materials, Equipment and Supplies Procurement</b>				
Bismarck/Mandan	\$11,721,467		\$64,018	\$11,785,485
Fargo/West Fargo	11,536,968		152,008	11,688,976
Grand Forks	1,155,103	62,170,955	19,846	63,345,904
Minot	10,686,829	52,887,117		63,573,946
Other	8,610,258		228,003	8,838,261
	<b>\$43,710,625</b>	<b>\$115,058,072</b>	<b>\$463,875</b>	<b>\$159,232,572</b>
<b>3. Total Annual Expenditures</b>				
Bismarck/Mandan	\$11,721,467		\$64,018	\$11,785,485
Fargo/West Fargo	17,550,386		152,008	17,702,394
Grand Forks	1,155,103	74,154,498	19,846	75,329,447
Minot	10,686,829	87,465,117		98,151,946
Other	8,581,497		228,003	8,809,500
	<b>\$49,695,282</b>	<b>\$161,619,615</b>	<b>\$463,875</b>	<b>\$211,778,772</b>

\* Army Reserve Expenditures were estimated because actual figures were not available.

# FY 18 North Dakota Military Force Structure Economic Impact Analysis

**TABLE 4**  
**ESTIMATE OF NUMBER OF INDIRECT JOBS CREATED (By Location)**

Type of Personnel	National Guard	Active Duty	Reserve	Total	Multiplier	Indirect Jobs Created
<b>Bismarck/Mandan</b>						
Active Duty / AGR	149	13	1	163	.29	47
Reserve / Traditional	603		51	654	.13	85
AF Civilian / Technicians	222		6	228	.43	98
NAF Civilians / BX / PX					.43	
State Employees	67			67	.43	29
Contractors / Private Bus.	22			22	.43	9
	<b>1,063</b>	<b>13</b>	<b>58</b>	<b>1,134</b>		<b>269</b>
<b>Fargo/West Fargo</b>						
Active Duty / AGR	162	18	11	191	.29	55
Reserve / Traditional	1,214		182	1,396	.13	181
AF Civilian / Technicians	196		3	199	.43	86
NAF Civilians / BX / PX	2			2	.43	1
State Employees	33			33	.43	14
Contractors / Private Bus.	22			22	.43	9
	<b>1,629</b>	<b>18</b>	<b>196</b>	<b>1,843</b>		<b>347</b>
<b>Grand Forks</b>						
Active Duty / AGR	20	1,621		1,641	.29	476
Reserve / Traditional	276		16	292	.13	38
AF Civilian / Technicians	11	373	1	385	.43	166
NAF Civilians / BX / PX		115		115	.43	49
State Employees	3			3	.43	1
Contractors / Private Bus.	1	447		448	.43	193
	<b>311</b>	<b>2,556</b>	<b>17</b>	<b>2,884</b>		<b>923</b>
<b>Minot</b>						
Active Duty / AGR	75	5,338		5,413	.29	1,570
Reserve / Traditional	192		17	209	.13	27
AF Civilian / Technicians	9	514		523	.43	225
NAF Civilians / BX / PX		180		180	.43	77
State Employees	4			4	.43	2
Contractors / Private Bus.	1	321		322	.43	138
	<b>281</b>	<b>6,353</b>	<b>17</b>	<b>6,650</b>		<b>2,039</b>
<b>Other</b>						
Active Duty / AGR	110		6	116	.29	34
Reserve / Traditional	762		51	813	.13	106
Civilian Technicians	58			58	.43	25
NAF Civilians / BX / PX	5			5	.43	2
State Employees	49			49	.43	21
Contractors / Private Bus.	2			2	.43	1
	<b>986</b>		<b>57</b>	<b>1,043</b>		<b>188</b>
<b>Total</b>	<b>4,270</b>	<b>8,940</b>	<b>345</b>	<b>13,555</b>		<b>3,766</b>

Multiplier: LMI Economic Impact database, Installations and Indirect/Induced Job Multipliers, Feb 95.

## FY 18 North Dakota Military Force Structure Economic Impact Analysis

**TABLE 4a**  
**ESTIMATED ANNUAL DOLLAR VALUE OF JOBS CREATED (by location)**

	<b><u>Indirect Jobs</u></b>	<b><u>Average Annual Salary</u></b>	<b><u>Amount</u></b>
Bismarck/Mandan	269	\$50,492	\$13,562,151
Fargo/West Fargo	347	\$49,452	17,157,371
Grand Forks	923	\$46,696	43,090,135
Minot	2,039	\$49,088	100,110,558
Other	188	\$51,272	9,657,081
	<b>3,766</b>		<b>\$183,577,297</b>

The average annual salary was taken from [www.ndworkforceintelligence.com](http://www.ndworkforceintelligence.com) for the 1<sup>st</sup> quarter of 2018.



# FY 18 North Dakota Military Force Structure Economic Impact Analysis

**TABLE 5**  
**TOTAL ANNUAL ECONOMIC IMPACT ESTIMATES (By Location)**

	<u>National Guard</u>	<u>Active Duty</u>	<u>Reserve</u>	<u>Total</u>
<b>Annual Payroll</b>				
Bismarck/Mandan	\$70,846,930	\$9,058,746	\$832,524	\$72,585,330
Fargo/West Fargo	67,790,144	896,836	2,222,008	70,908,988
Grand Forks	8,554,544	131,287,606	165,597	140,007,747
Minot	11,244,576	360,459,505	973,157	372,677,238
Other	25,895,264		773,135	26,668,399
	<b>\$184,331,458</b>	<b>\$493,549,823</b>	<b>\$4,966,421</b>	<b>\$682,847,702</b>
<b>Annual Expenditures</b>				
Bismarck/Mandan	\$11,721,467		\$64,018	11,785,485
Fargo/West Fargo	17,550,386		152,008	17,702,394
Grand Forks	1,155,103	74,154,498	19,846	75,329,447
Minot	10,685,829	87,465,117		98,151,946
Other	8,581,497		228,003	8,809,500
	<b>\$49,695,282</b>	<b>\$161,619,615</b>	<b>\$463,875</b>	<b>\$211,778,772</b>
<b>Estimated Annual Dollar Value of Jobs Created</b>				
Bismarck/Mandan	\$12,892,122	\$190,355	\$479,674	\$13,562,151
Fargo/West Fargo	15,507,653	258,139	1,391,579	17,128,689
Grand Forks	2,247,478	40,725,449	117,207	43,076,593
Minot	2,588,410	97,413,663	108,484	100,096,323
Other	9,227,935		429,147	9,657,081
	<b>\$42,463,598</b>	<b>\$138,587,607</b>	<b>\$2,526,091</b>	<b>\$183,577,297</b>
<b>GRAND TOTAL</b>				
Bismarck/Mandan	\$95,460,519	\$1,096,231	\$1,376,216	\$97,932,966
Fargo/West Fargo	100,848,183	1,154,975	3,765,595	105,768,753
Grand Forks	11,957,125	246,167,553	302,650	258,427,329
Minot	24,519,815	545,338,285	1,081,641	570,939,742
Other	43,704,696		1,430,285	45,134,980
<b>GRAND TOTAL</b>	<b>\$276,490,339</b>	<b>\$793,757,045</b>	<b>\$7,956,387</b>	<b>\$1,078,203,771</b>

## FY 18 North Dakota Military Force Structure Economic Impact Analysis

**TABLE 6**  
**PERSONNEL BY CLASSIFICATIONS (By Component)**

	<u>National Guard</u>	<u>Active Duty</u>	<u>Reserve</u>	<u>Total</u>
<b>1. Military Appropriated</b>				
Air force	1,105	6,959	17	8,081
Army	2,918	18	197	3,133
Marines		9	57	66
Navy		4	64	68
<b>Total</b>	<b>4,023</b>	<b>6,990</b>	<b>335</b>	<b>11,348</b>
<b>2. Dependents</b>				
Air force	1,441	7,540	22	9,003
Army	3,749	22	267	4,038
Marines		11	74	85
Navy		5	83	88
<b>Total</b>	<b>5,190</b>	<b>7,578</b>	<b>445</b>	<b>13,214</b>
<b>3. Civilian Appropriated</b>				
General scale and wage grade	496	887	10	1,393
Excepted technicians included in part 1 *	(460)			(460)
<b>Total</b>	<b>36</b>	<b>887</b>	<b>10</b>	<b>933</b>
				6
<b>4. Other</b>				
State Employees	156			156
Civilian NAF		295		295
Civilian BX/PX	3	202		205
Contract Employees	48	438		481
Private Business	4	133		137
<b>Total</b>	<b>211</b>	<b>1,063</b>		<b>1,274</b>
<b>Total Personnel and Dependents</b>	<b>9,460</b>	<b>16,518</b>	<b>791</b>	<b>26,769</b>

\* National Guard Civilians are also military members and are included in with the Military Appropriated. Civilians, therefore not added into the total personnel.

## FY 18 North Dakota Military Force Structure Economic Impact Analysis

**TABLE 7**  
**ANNUAL PAYROLL BY CLASSIFICATION (By Component)**

	<u>National Guard</u>	<u>Active Duty</u>	<u>Reserve *</u>	<u>Total</u>
<b>1. Military Appropriated</b>				
Air force	\$43,504,370	\$400,645,652	\$973,157	\$445,123,180
Army	77,542,473	1,048,491	1,589,417	80,180,381
Marines		557,446	773,135	1,330,581
Navy		262,909	1,100,860	1,363,769
Total	<b>\$121,046,843</b>	<b>\$402,514,498</b>	<b>\$4,436,569</b>	<b>\$527,997,911</b>
<b>2. Civilian Appropriated</b>				
Civilian Employees	\$48,258,842	\$73,651,008	\$529,852	\$122,403,702
Total	<b>\$48,258,842</b>	<b>\$73,615,008</b>	<b>\$529,852</b>	<b>\$122,403,702</b>
<b>3. Other</b>				
State Employees	\$12,033,773			\$12,033,773
Civilian NAF		10,316,059		10,316,059
Civilian BX/PX/DECA	140,000	5,548,272		5,548,272
Cont/Private Employees**	2,852,000	1,555,987		1,555,987
Total	<b>\$15,025,773</b>	<b>\$17,420,318</b>		<b>\$32,446,091</b>
<b>Total Annual Payroll</b>	<b>\$184,331,458</b>	<b>\$493,549,823</b>	<b>\$4,966,421</b>	<b>\$682,847,702</b>

\*The Reserve payroll was estimated based on known members because actual payroll amounts were not available.

\*\* The National Guard contract employees payroll was estimated because actual payroll amounts were not available

## FY 18 North Dakota Military Force Structure Economic Impact Analysis

**TABLE 8**  
**EXPENDITURES FOR CONSTRUCTION, SERVICES, AND**  
**MATERIALS (By Component)**

	<b><u>National Guard</u></b>	<b><u>Active Duty</u></b>	<b><u>*Reserve</u></b>	<b><u>Total</u></b>
<b>Construction</b>				
Military Construction Program	\$5,984,657			\$5,984,657
Military Family Housing				
Operations and Maintenance		46,561,543		46,561,543
Other				
Total	<b>\$5,984,657</b>	<b>\$46,561,543</b>		<b>\$52,546,200</b>
 <b>Services, Materials, Equipment and Supplies Procurement</b>	 <b>\$43,710,625</b>	 <b>\$115,058,072</b>	 <b>\$463,875</b>	 <b>\$159,232,572</b>
 <b>Total Annual Expenditures</b>	 <b>\$49,695,282</b>	 <b>161,619,615</b>	 <b>\$463,875</b>	 <b>\$211,778,772</b>

\* Army Reserve Expenditures were estimated because actual figures were not available.

## FY 18 North Dakota Military Force Structure Economic Impact Analysis

**TABLE 9**

**ESTIMATE OF NUMBER AND DOLLAR VALUE OF INDIRECT JOBS CREATED (By Component)**

<b>Type of Personnel</b>	<b><u>National Guard</u></b>	<b><u>Active Duty</u></b>	<b><u>Reserve</u></b>	<b><u>Total</u></b>	<b><u>Multiplier</u></b>	<b><u>Indirect Jobs Created</u></b>
Active Duty Military	516	6,990	18	7,524	.29	2,181
Traditional	3,047		317	3,364	.13	437
AFP Civilian	496	887	10	1,393	.43	599
Other Civilian	211	1,063		1,273	.43	548
<b>TOTAL</b>	<b>4,270</b>	<b>8,940</b>	<b>345</b>	<b>13,555</b>		<b>3,766</b>

**Estimated Number of Indirect Jobs Created.**

<b>Active Duty</b>	2,865
<b>National Guard</b>	850
<b>Reserve</b>	51
<b>Total Jobs Created</b>	<b>3,766</b>

**Estimated Annual Dollar Value of Jobs Created.**

Active Duty	<b>\$138,587,607</b>
National Guard	<b>42,463,598</b>
Reserve	<b><u>2,526,091</u></b>
<b>Estimated Total</b>	<b>\$183,577,297</b>

Multiplier:

LMI Economic Impact database, Installations and Indirect/Induced Job Multipliers, Feb 95

## FY 18 North Dakota Military Force Structure Economic Impact Analysis

**TABLE 10**  
**TOTAL ANNUAL ECONOMIC IMPACT ESTIMATE (By Component)**

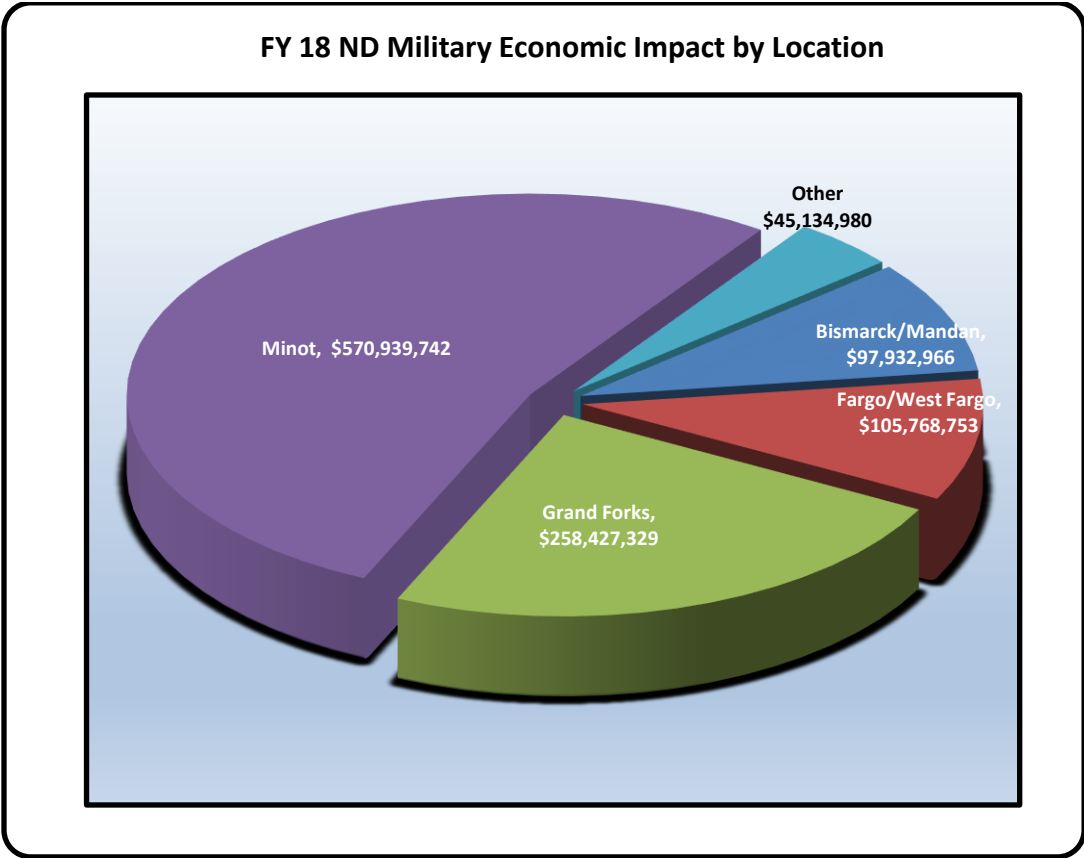
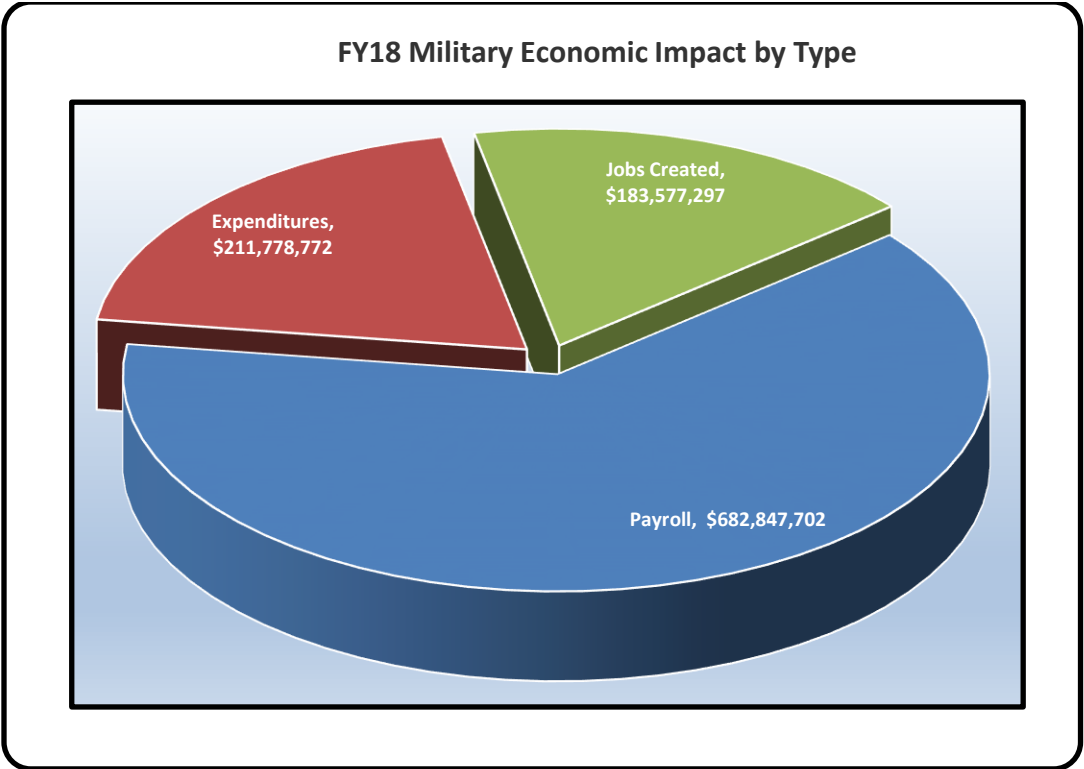
Annual Payroll		<u>National Guard</u>	<u>Active Duty</u>	<u>Reserve</u>	<u>Total</u>
	Military	\$121,046,843	\$402,514,498	\$4,436,569	\$527,997,910
	Fed Civilian	48,258,842	73,615,008	529,852	122,403,702
	Other Civilian	15,025,773	17,420,318		32,446,091
		<b>\$184,331,458</b>	<b>\$493,549,824</b>	<b>\$4,966,421</b>	<b>\$682,847,702</b>
Annual Expenditures					
		<b>\$49,695,282</b>	<b>\$161,619,615</b>	<b>\$463,875</b>	<b>\$211,778,772</b>
Estimated Annual Dollar Value of Jobs Created					
		<b>\$42,463,598</b>	<b>\$138,587,297</b>	<b>\$2,526,091</b>	<b>\$183,577,297</b>
TOTAL		<b>\$276,490,339</b>	<b>\$793,757,045</b>	<b>\$7,956,387</b>	<b>\$1,078,203,771</b>

## FY 18 North Dakota Military Force Structure Economic Impact Analysis

**TABLE 11**  
**TOTAL ANNUAL ECONOMIC IMPACT ESTIMATE (By Location)**

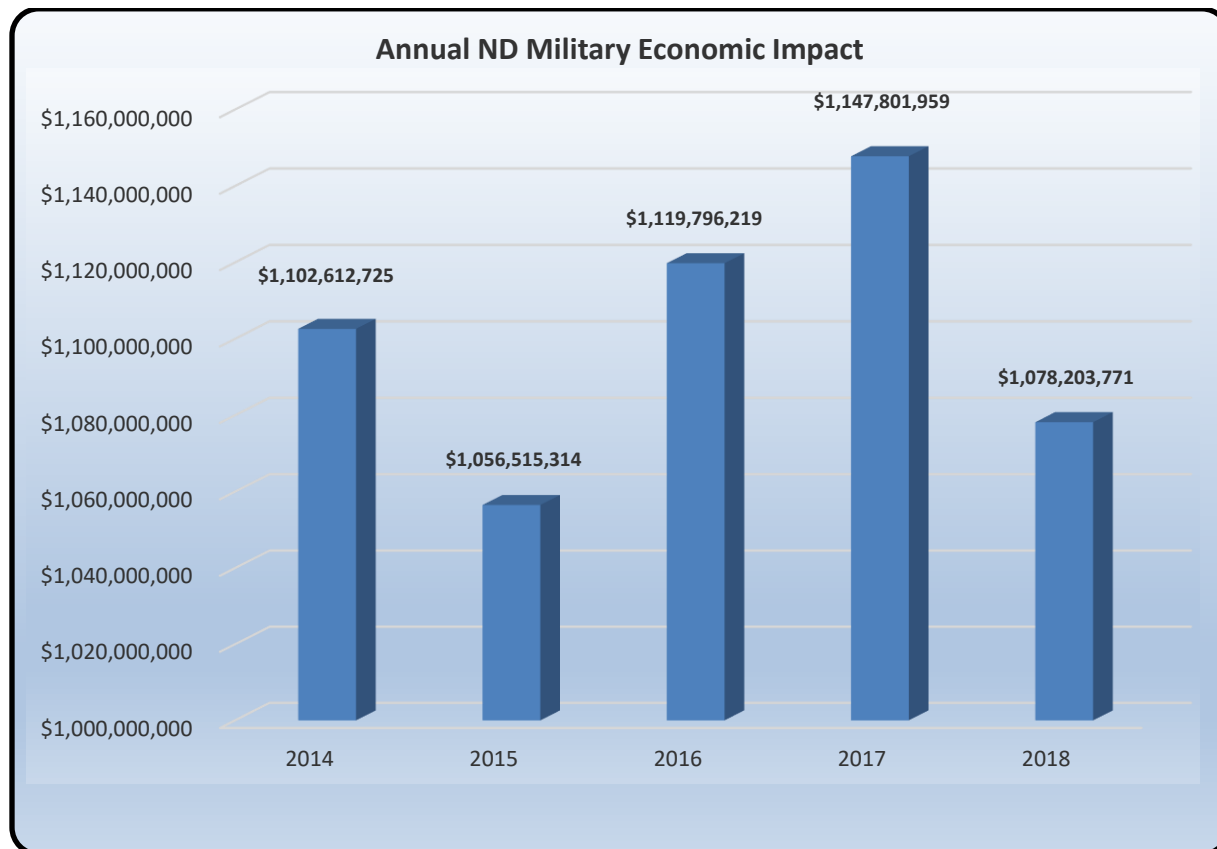
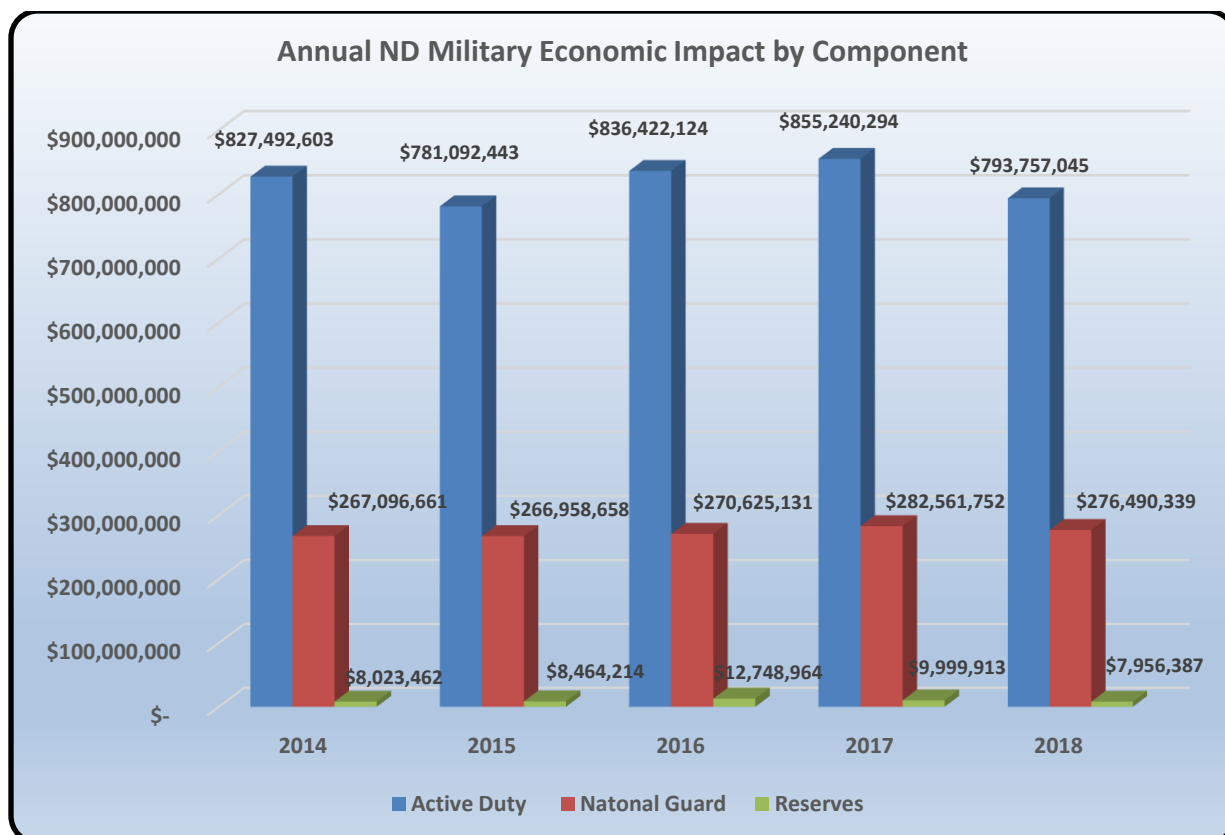
	<u>National Guard</u>	<u>Active Duty</u>	<u>Reserves</u>	<u>Total</u>
Bismarck / Mandan	\$95,460,519	\$1,096,231	\$1,376,216	\$97,932,966
Devils Lake	31,394,483			31,394,483
Dickinson	1,358,113			1,358,113
Edgeley	1,157,299			1,157,299
Fargo / West Fargo	100,848,183	1,154,975	3,765,595	105,768,754
Grand Forks	11,957,125	246,167,553	302,650	258,427,328
Jamestown	1,673,042			1,673,042
Lisbon	617,400			617,400
Mayville	7,404			7,404
Minot	24,519,815	545,338,285	1,081,641	570,939,742
Valley City	3,560,384			3,560,384
Wahpeton	2,874,567		1,430,285	4,304,852
Williston	455,191			455,191
Wishek	606,814			606,814
<b>TOTAL</b>	<b>\$276,490,339</b>	<b>\$793,757,045</b>	<b>\$7,956,387</b>	<b>\$1,078,203,771</b>

**FY 18 North Dakota Military Force Structure Economic Impact Analysis**



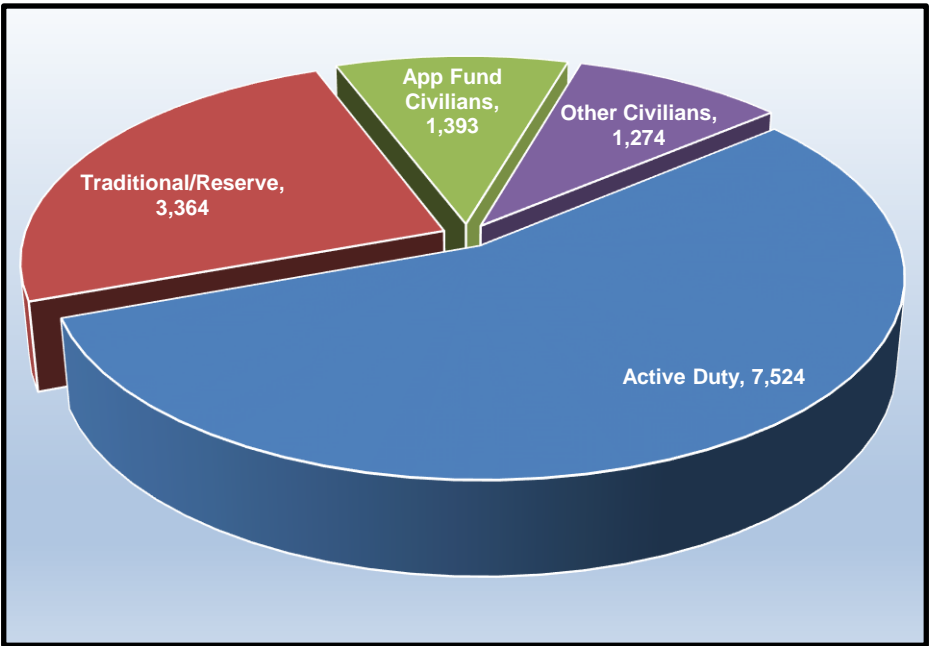


## FY 18 North Dakota Military Force Structure Economic Impact Analysis

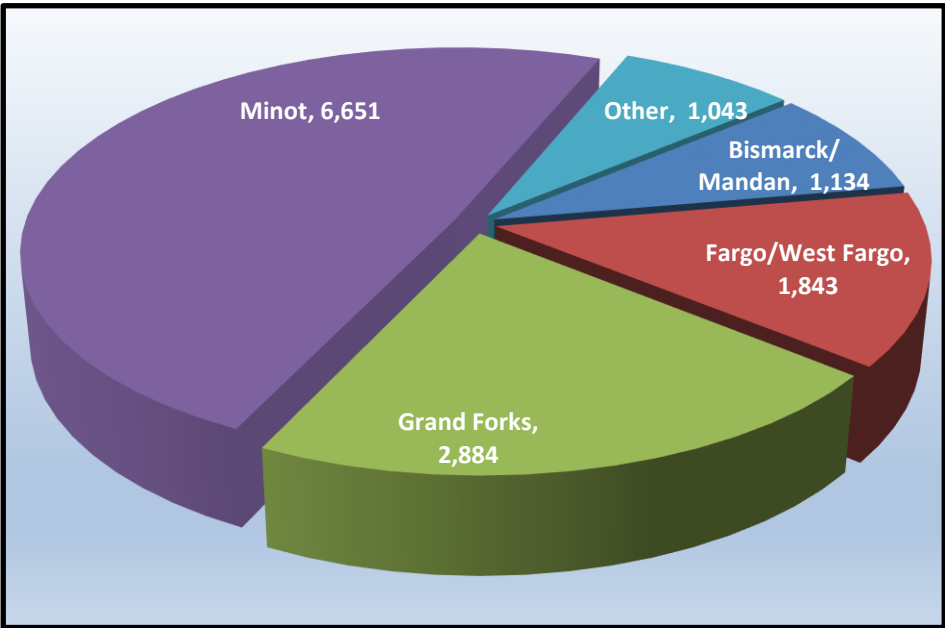


**FY 18 North Dakota Military Force Structure Economic Impact Analysis**

**FY 18 ND Military Direct Jobs by Type**

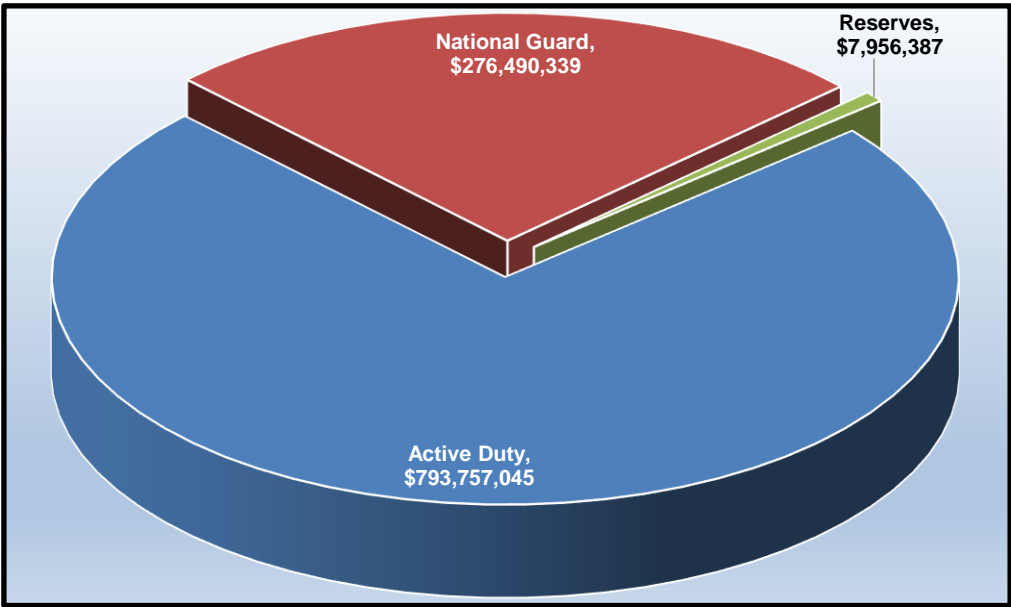


**FY18 ND Direct Military Jobs by Location**

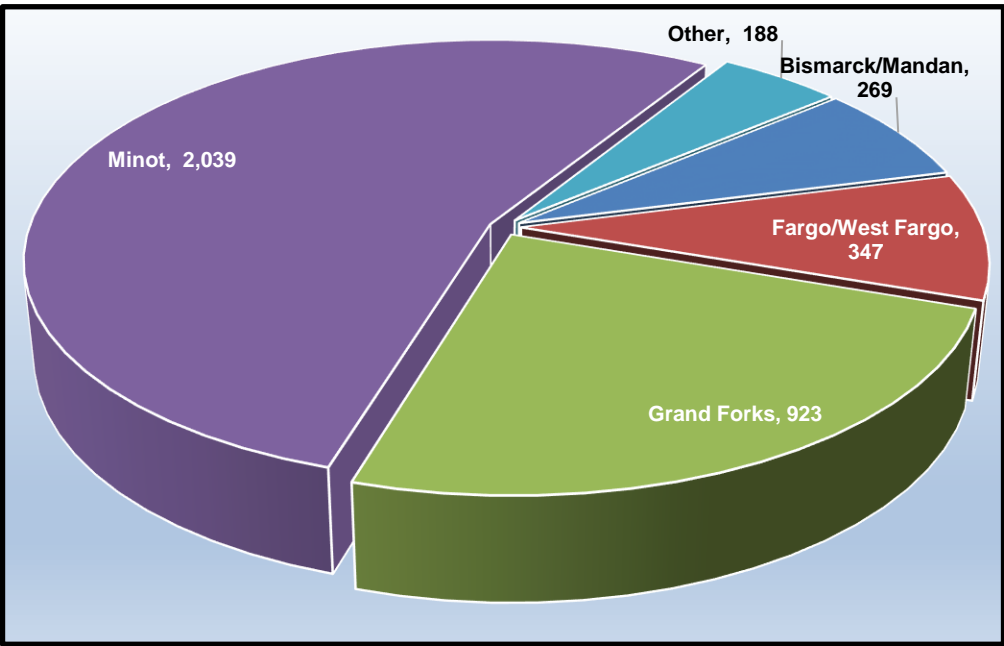


**FY 18 North Dakota Military Force Structure Economic Impact Analysis**

**FY18 Military Economic Impact by Component**



**FY18 Indirect Jobs Created by Location**



## **FY 18 North Dakota Military Force Structure Economic Impact Analysis**

The following Military organizations in North Dakota have been represented in this analysis.

*Army Reserve- Bismarck, Fargo and Grand Forks*

*Grand Forks Air Force Base- Grand Forks ND*

*Marine Reserves- Wahpeton ND*

*Minot Air Force Base- Minot ND*

*Naval Reserve- Fargo ND*

*North Dakota Army National Guard State-wide*

*North Dakota Air National Guard- Fargo and Minot ND*

*Army Recruiting Stations State-wide*

*Marine Recruiting Stations State-wide*

*Air Force Recruiting Stations State-wide*

*Navy Recruiting Stations State-wide*