

THE ECONOMIC CONTRIBUTION OF MCKENZIE HEALTH, 2026

CENTER FOR SOCIAL RESEARCH REPORT NO. 132

McKenzie Health

NDSU CENTER FOR SOCIAL RESEARCH

NDSU AGRIBUSINESS AND APPLIED ECONOMICS

The Economic Contribution of McKenzie Health, 2026

Prepared for: McKenzie Health

Prepared by:

Nancy Hodur, Director, Center for Social Research

Dean Bangsund, Research Scientist, Agribusiness and Applied Economics

Avram Slone, Research Specialist, Center for Social Research

Chelsey Hukriede, Research Specialist, Center for Social Research

North Dakota State University

September 2026

Acknowledgments

We would like to extend special thanks to individuals from McKenzie Health for all their help with data collection, document content, and other immeasurable assistance with this study.

Peter Edis, Chief Executive Officer
Deborah Tucker, Executive Assistant
William Merkle, Chief Financial Officer
Lynn Welker-Fevold, President, Benefit Fund
Gretta Ensrud, Human Resources Director and Patient Financial Services Director

Funding for this study was provided by McKenzie Health.

The authors assume responsibility for any errors of omission, logic, or otherwise. Any opinions, findings, and conclusions expressed in this publication are those of the authors and do not necessarily reflect the view of the Department of Agribusiness and Applied Economics, North Dakota State University, or the study sponsors.

This publication is available electronically at: https://ageconsearch.umn.edu/. Please address your inquiries regarding this publication to: Center for Social Research, PO Box 6050, Dept. 2574, Fargo, ND 58108-6050. Phone: 701-231-8621, Email: Nancy.Hodur@ndsu.edu.

NDSU is an equal opportunity institution.

Copyright © 2026 by Hodur, Bangsund, Slone, and Hukriede. All rights reserved. Readers may make verbatim copies of this document for non-commercial purposes by any means, provided this copyright notice appears on all such copies.

Table of Contents

List of Tables ii
List of Figures iii
Executive Summary 1
McKenzie County Profile 1
McKenzie Health Profile 2
Introduction 5
Study Objectives 5
Data Collections and Approach 5
McKenzie Health 6
Input-Output Modeling 6
McKenzie County Profile 7
Population Characteristics 7
Household Characteristics 11
Youth Characteristics 12
Economic Characteristics 14
Insurance Characteristics 16
McKenzie Health Profile 17
McKenzie County Health Care Sector 19
Direct Economic Effects 24
Secondary Economic Effects 26
Capital Expenditures 27
Total Economic Effects from Operations and Capital Expenditures 28
Government Revenues 29
Summary and Conclusions 32
References 33
Appendix A Survey Instrument 36

List of Tables

Table 1. Live Births in McKenzie County, 2010 to 2025 12
Table 2. Employment Counts, McKenzie Health, January 2023 and August 2026 19
Table 3. Total Output, Health Care and Social Assistance Sectors, McKenzie County, 2020 to 2024 22
Table 4. Transfer Payments, McKenzie County and North Dakota, 2022 23
Table 5. Economic Profile, McKenzie Health, McKenzie County, North Dakota, 2026 and 2027 (projected) 25
Table 6. Economic Profile, McKenzie Health, Williams County, North Dakota, 2026 and 2027 (projected) 25
Table 7. Economic Effects, by Key Economic Metrics, Operations, McKenzie Health, McKenzie County, 2026 and 2027 (projected) 26
Table 8. Economic Effects, by Key Economic Metrics, Operations, McKenzie Health, Williams County, 2026 and 2027 (projected) 27
Table 9. Economic Effects, by Key Economic Metrics, Capital Expenditures, McKenzie Health, McKenzie County, 2027 (projected) 28
Table 10. Economic Effects, by Key Economic Metrics, Capital Expenditures, McKenzie Health, Williams County, 2027 (projected) 28
Table 11. Total (Direct, Indirect and Induced) Economic Effects, by Key Economic Metrics, Operations and Capital Expenditures, McKenzie Health, McKenzie County and Williams County, 2026 and 2027 (projected) 29
Table 12. State and Local Government Tax Revenues, Operations, McKenzie Health, McKenzie County, 2026 and 2027 (projected) 30
Table 13. State and Local Government Tax Revenues, Operations, McKenzie Health, Williams County, 2026 and 2027 (projected) 31

List of Figures

Figure 1. Input-Output (I-O) Analysis Visualization 7
Figure 2. Total Population of McKenzie County, North Dakota 2010 to 2025 8
Figure 3. Total Population of North Dakota, 2010 to 2025 8
Figure 4. Population and Percent Change by Age, McKenzie County, 2020 and 2025 9
Figure 5. Population by Gender, McKenzie County, 2020 and 2025 9
Figure 6. Population by Race and Hispanic Origin as a Percentage of Total Population, McKenzie County, 2020 and 2025 10
Figure 7. Population by Race and Hispanic Origin, McKenzie County, 2020 and 2025 10
Figure 8. Household Characteristics, McKenzie County, 2010, 2019, and 2024 11
Figure 9. Household Types as a Percentage of Total Households, McKenzie County, 2010, 2019, and 2024 12
Figure 10. Birth Rates for McKenzie County, North Dakota, and United States, 2010 to 2025 13
Figure 11. Average Daily Enrollment for Public Schools in McKenzie County and North Dakota, 2015/16 to 2025/26 13
Figure 12. High School Graduation Rates for McKenzie County and North Dakota, 2015/16 to 2024/25 14
Figure 13. Average Number of Jobs, McKenzie County, 2005 to 2025 15
Figure 14. Median Household Income, McKenzie County, North Dakota, and United States, 2010 to 2024 (current dollars) 15
Figure 15. Per Capita Personal Income, McKenzie County, North Dakota, and United States, 2010 to 2024 (current dollars) 16
Figure 16. Residents Under Age 65 Without Health Insurance, McKenzie County and North Dakota, 2020 to 2024 17
Figure 17. Uninsured Children Ages 0 to 18, McKenzie County and North Dakota, 2020 to 2024 17
Figure 18. McKenzie Health Employment, by Employment Category, 2023 and 2026 19
Figure 19. Total Output of all Health Care and Social Assistance Sectors and McKenzie Health Sectors, 2016 to 2024 20
Figure 20. McKenzie Health Sectors as a Percentage of All Health Care and Social Assistance Sectors, Economic Output, McKenzie County, 2016 to 2024 21
Figure 21. Total Output and Percentage of Total Output of Various Components of the Health Care and Social Assistance Sector, McKenzie County, 2024 22
Figure 22. Transfer Payments for Medical Benefits, McKenzie County, 2012 to 2022 24
Figure 23. Total In-County Expenditures, McKenzie and Williams Counties, McKenzie Health, 2026 and 2027 (projected) 26

Executive Summary

Access to health care is especially important to the well-being of residents in North Dakota, and even more so in rural communities. In addition to medical care and general well-being, medical providers also serve as an important component of rural economies. Health care providers often represent a large and stable economic presence in rural communities. Economic contribution assessments are used to gauge the relative importance of those providers to their host communities and rural counties. An assessment of economic effects serves to educate and inform a range of stakeholders about the economic size and relative importance of economic sectors and industries.

The main focus of this study is to provide an overview of the current conditions and trends that affect McKenzie County and to measure the economic contribution of its healthcare system, McKenzie Health. The study objectives are:

- Develop a McKenzie County profile using various demographic and economic indicators to describe current conditions and recent trends in McKenzie County, North Dakota.
- Conduct an assessment of the economic contribution of McKenzie Health on the McKenzie County and Williams County economies.

McKenzie County Profile

- Since 2010, McKenzie County experienced high population and economic growth as a result of the rapid expansion of the oil and gas industry. The population of McKenzie County increased from 6,400 people in 2010 to 15,192 people in 2025, an increase of 137.4 percent.

- Population has stabilized since 2019, with a slight decline post-pandemic in 2021 and 2022 to 13,858 and 13,893, respectively, followed by moderate annual increases of 2.6 to 3.6 percent since 2022.

- McKenzie County is slightly more diverse than North Dakota overall, with a population that is 80.2 percent white, 10.7 percent American Indian & Alaska Native, and 9.1 percent multiracial or of another race. McKenzie County is 14.9 percent Hispanic (of any race).

- McKenzie County population continues to have a higher percentage of males than females; 54 percent and 46 percent, respectively. The percentage of males in McKenzie County is slightly higher than in North Dakota overall where males comprise 51 percent of the population.

- From 2020 to 2025, McKenzie County saw population growth among children aged 5 to 17 (+11.1 percent) and adults aged 65 and older (+27.0 percent). The county saw population decline in children under the age of 5 (-11.7 percent) and adults aged 18 to 24 (-6.7 percent). The population of adults aged 25 to 64 did not change.

- The number of households in McKenzie County increased by 33.9 percent from 2020 to 2024, from 4,478 to 5,997. Households with children ages 0 to 17 increased 57.2 percent, from 1,247 to 1,960. The average household size decreased from 3.03 in 2020 to 2.34 in 2024.

- From 2020 to 2024 there has been a decrease in owner-occupied housing units (57.5 percent to 53.4 percent of total households) and an increase in renter-occupied housing units (42.5 percent to 46.6 percent of total households).

- The birth rate (total number of live births per 1,000 people) in McKenzie County more than quadrupled from 2010 to 2020, increasing from 8.3 to 38.8 births per 1,000 population, before declining to 18.9 births per 1,000 population in 2025. Even with the decline, the birth rate in McKenzie County is higher than North Dakota's rate of 12.5 live births per 1,000 people. The number of live births to mothers that reside in McKenzie County increased from 53 births in 2010 to 287 births in 2025.

- The number of births at McKenzie Health has increased substantially since 2023, increasing from 66 births in 2023 to 111 in 2025 - with births at McKenzie Health estimated to reach approximately 200 in 2026.

- Public school enrollment has increased steadily in McKenzie County and statewide since 2015/16. Average daily enrollment increased from 1,844 students in 2015/16 to 3,083 students in 2025/26, a 67 percent increase countywide, compared to an 8 percent increase statewide over the same period. With the exception of a slight decline in enrollment in 2020/21, and stable enrollment in 2024/25, enrollment has increased annually since 2015/16.

- McKenzie County saw a 377.5 percent increase in employment from 2,463 jobs in 2005 to 11,760 jobs in 2025. Employment dipped from 9,897 jobs in 2020 to 9,126 jobs in 2021, coinciding with the COVID-19 pandemic and a broader slowdown in the oil and gas industry, before recovering and increasing annually from 2021 to 2025.

- Median household income in McKenzie County increased from $51,641 in 2010 to $110,682 in 2024.

- In McKenzie County, both the number and percent of residents under age 65 without health insurance rose between 2020 and 2021, from 17.1 percent (2,152 residents) to 19.4 percent (2,428 residents), before declining steadily to 11.6 percent (1,507 residents) by 2024. The uninsured rate among children (ages 0 to 18) in McKenzie County followed a similar pattern, peaking at 24.4 percent (1,094 children) in 2021 before declining to 13.4 percent (597 children) by 2024.

McKenzie Health Profile

- McKenzie Health operates a trauma level IV, 24 bed critical access hospital. In February of 2026, McKenzie Health was for the first time named a Chartis Top 100 Critical Access Hospital. The designation recognizes top performing rural hospitals across the United States and is regarded as one of the industry's most significant designations.

- McKenzie Health also offers pediatric and family medicine and specialty clinical services. In addition to hospital and clinical services, McKenzie Health operates Good Shepherd Home, a 39-

bed long term care facility; Horizon Assisted Living, an 11-apartment assisted living facility; and the Connie Wold Wellness Center which also houses McKenzie Health physical and occupational services.

- McKenzie Health has grown and expanded services in Williston and Minot. McKenzie Health Williston has two locations in Williston, providing urgent and walk-in clinics, orthopedics, imaging and labs, primary care, family medicine, obstetrics and gynecology, general surgery consultations, and physical therapy. In Minot, McKenzie Health provides specialized and rapid access orthopedic services and MRI imaging.

- In 2025 major improvements were made to both Horizon Assisted Living and Good Shepard Home. Improvements included a kitchen renovation at Horizon Assisted Living and a Greenhouse, Chapel, and Courtyard expansion adjacent to Horizon Assisted Living and Good Shepard Home. The renovations were fully funded by almost $3 million in donations. The Greenhouse is an especially noteworthy addition; it is the only one of its kind in North Dakota.

- McKenzie Health employs 537 people including 90 physicians, physicians' assistants, and nurse practitioners; 183 CNA's, RN's and LPN's; and 64 health technicians.

- McKenzie Health operates in several of the economic sectors that comprise the Health Care and Social Assistance Sector in McKenzie County. Economic output associated with the specific sectors aligned with activities and services provided by McKenzie Health grew from $35.4 million in 2020 to $55.0 million in 2024, a 55.4 percent increase. McKenzie Health is responsible for 76 percent of economic activity from health care services in McKenzie County.

- The first round of payments for services, labor, and other operations inputs represents direct economic effects. In 2026, direct economic effects from McKenzie Health operations were estimated to be $62.7 million in McKenzie County and $16.4 million in Williams County.

- Indirect and induced economic effects (secondary effects) in 2026 from McKenzie Health operations were estimated at $14.7 million and $2.9 million in McKenzie County and Williams County, respectively.

- Total direct and secondary economic effects from McKenzie Health operations in 2026 were $77.4 million and $19.3 million in McKenzie and Williams counties, respectively.

- Direct economic output (direct economic effects) from operations for 2027 was projected to be $73.1 million and $19.1 million in McKenzie County and Williams County, respectively. Indirect and induced economic effects from operations for 2027 were projected at $16.8 million and $4.3 million in McKenzie and Williams counties, respectively. Total (direct and secondary) 2027 economic effects were projected at $89.9 million and $23.4 million in McKenzie and Williams counties, respectively.

- Direct capital expenditures in Williams County for 2027 were projected to be $5.5 million. Total economic effects (direct, indirect and induced) from capital expenditures were projected to be $7.4 million in Williams County. Economic effects from capital expenditures in McKenzie County will be minimal, and consist of spillover (indirect and induced) from capital expenditures made in Williams County.

- Payroll expenditures of $46.3 million supported direct employment of 370 jobs in McKenzie County and payroll expenditures of $16.4 million supported direct employment of 60 jobs in Williams County in 2026.

- Employment compensation (payroll expenditures) for 2027 is projected to increase to $73.1 million with direct employment increasing to 408 jobs in McKenzie County and to $19.1 million with direct employment increasing to 67 jobs in Williams County.

- In 2026, secondary employment supported 103 jobs and $5.0 million in labor income in McKenzie County and 17 jobs and $952,000 in labor income in McKenzie County. In 2027, projected secondary employment is expected to support 92 jobs and $5.0 million in labor income in McKenzie County and 25 jobs and $1.4 million in labor income in Williams County.

- McKenzie Health operations in 2026 supported total employment (direct and secondary) of 474 jobs in McKenzie County and 77 jobs in Williams County. For 2027 McKenzie Health operations are projected to support total employment (direct and secondary) of 499 jobs in McKenzie County and 92 jobs in Williams County.

- Tax revenues are generated by operations of McKenzie Health and from secondary business volume. In 2026, total government revenues (direct and secondary) for local and state jurisdictions generated by McKenzie Health were estimated to be $709,700 and $125,700 in McKenzie and Williams counties, respectively. Total direct tax collections for 2027 were projected to be $910,500 and $171,600 in McKenzie and Williams counties, respectively.

- Changing socio-economic conditions in the past decade have resulted in the need for expanded health care services in McKenzie County. McKenzie Health has continued to grow and respond to those needs by expanding services and providers not only in McKenzie County but by offering services in Minot and Williston. In addition to responding to McKenzie County's need for health care services, McKenzie Health is also making a substantial contribution to the local economy.

Introduction

Access to health care is important to the well-being of residents of North Dakota, especially in rural communities. Without locally available health care, rural residents may incur excess travel, postpone visits, or otherwise forgo health care. In addition to medical care and general well-being, medical providers also represent an important component of rural economies.

An economic contribution assessment serves to educate and inform a range of stakeholders about the economic size and relative importance of economic sectors and industries. Often businesses and industries find having economic information advantageous when discussing economic development, rural economic stability, job creation and retention, regional economic importance, and support of governmental revenues.

Health care providers are among the largest employers in rural communities and wage rates for medical professionals are often higher compared to other occupations in rural economies. Health care providers often represent a stable economic presence in these communities. Economic contribution assessments are used to gauge the relative importance of those providers to their host counties and communities.

Study Objectives

The main focus of this study is to provide an overview of the current conditions and trends that affect McKenzie County and to measure the economic contribution of its healthcare system, McKenzie Health. McKenzie Health has expanded services in Williams County. Accordingly, the study will also measure economic effects of McKenzie Health in Williams County. The assessment does not include the operations of the McKenzie Health Foundation. Study objectives are:

1. Update the 2022 McKenzie County profile using various demographic and economic indicators to describe current conditions and recent trends in McKenzie County.
2. Conduct an assessment of the effect of McKenzie Health's operations on the McKenzie County and Williams County economies.

Data Collections and Approach

Economic contribution assessments measure the economic output from a project, program, policy, or activity. Those outputs typically include jobs or employment, labor and proprietor income, and the sales and purchases of inputs. Economic output is categorized into direct and secondary effects. Direct effects are those changes in output, employment, or income that represent the initial or first-round effects as a result of payments for services, labor, and other inputs. Secondary effects are measured by the turnover and flow of dollars originating from a direct effect. Secondary effects are composed of *indirect* effects which represent business-to-business transactions, and *induced* effects which represent households-to-business transactions.

Labor income, employment, business volume, value-added, and fiscal revenues are common economic measures used frequently to show *magnitude*, or overall size of an economic effect. The terms *direct*, *indirect*, and *induced* describe the *causality* of an economic effect (see illustration below). Economy metrics are often presented both in total and by economic units. Economic units often represent an economic sector (i.e., businesses that produce/sell similar goods and services), groups of sectors that constitute industries (e.g., healthcare, oil and gas extraction, etc.), or an entire economy.

For any particular business, economic sector, or industry, what is considered the direct effect will vary depending upon which economic value or metric is being measured. When describing business volume, gross revenue is often called direct economic output, and is one part of the measurements of overall business volume or output. The mechanism by which that direct economic output affects business volume in the economy includes the expenditures for inputs (goods and services) consumed during one year's operations and payments for labor. For labor, jobs employed at the business, in the economic sector, or in an industry represent direct employment. When examining labor income specifically, the same principal applies. Direct labor income is the compensation to wage and salary and sole proprietor jobs that represent direct employment. Value-added is a measure of the contribution to the gross state product (GSP).

McKenzie Health

Expenditure data was collected from McKenzie Health. Expenditures represent outlays for operations such as wages and benefits, materials and supplies, maintenance, professional services, and other general operations expenses. Expenditure data for capital outlays were also collected for McKenzie Health. Expenditures for operations and capital expenditures are used to estimate direct economic effects and as inputs to model secondary effects. Using actual expenditures rather than estimates or other secondary data results in a robust estimate of economic effects with a high degree of confidence.

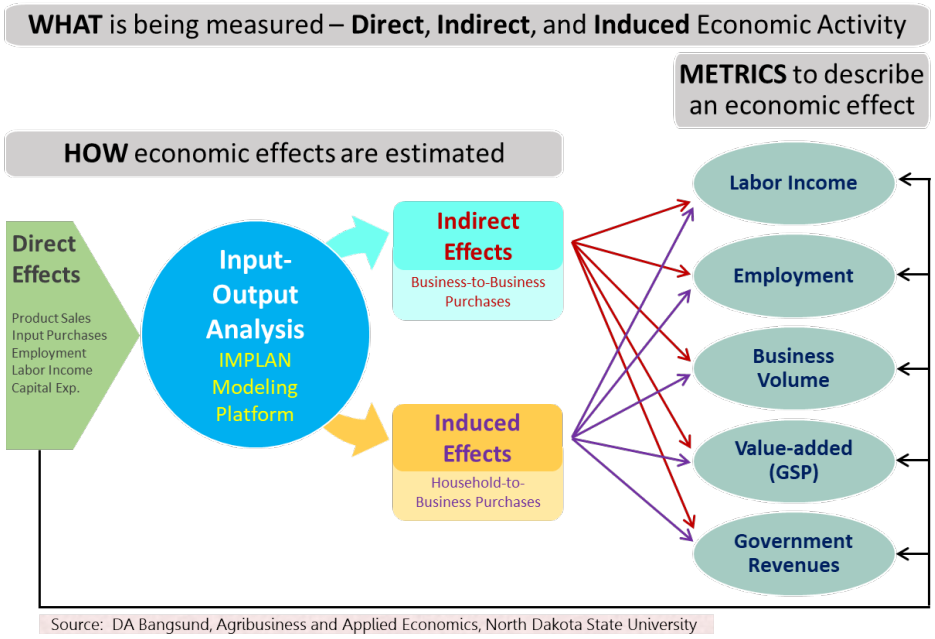
Input-Output Modeling

One of the most commonly accepted methods for measuring the magnitude and causality of economic effects is Input-Output (I-O) Analysis. I-O models are mathematical representations of both consuming and producing components of an economy, and trace the flow of dollars originating from transactions involving businesses, households, and governments. The IMPLAN I-O model was use to estimate economic effects of McKenzie Health on the McKenzie County economy.

IMPLAN is widely accepted and used for these types of assessments. IMPLAN divides an economy into 528 distinct economic sectors, and also includes a social accounts matrix that incorporates non-market transfers among households, businesses, and governments within an economy (e.g., social security payments). This study used the 2024 IMPLAN matrix for McKenzie County (IMPLAN Group LLC., 2025). See the illustration below (**Figure 1**) for a visualization of the I-O Analysis.

In 2025 IMPLAN Group, LLC updated and revised its matrix from 546 distinct industry sectors to 528. Revisions incorporate updates to the underlying government data sources and the use of non-lagged raw data as well as incorporating methodological improvements. The percentage of overall economic activities in the Health and Social Services Sector and percentage of that economic activity attributable to McKenzie Health were calculated using the new 528 sector model. The previous study used the 546-sector scheme. A comparison of overall economic activity reported in the previous study will reveal slightly different results than reported in this update. Differences are due to methodology changes, and not necessarily a change in the county's health care economy. For more information, see the following articles and notes: https://support.implan.com/hc/en-us/articles/38871403860123-528-Time-Series-Data-Release-Notes and https://support.implan.com/hc/en-us/articles/20747773412379-2018-2022-U-S-546-Industry-Data-Release-Notes

Figure 1. Input-Output (I-O) Analysis Visualization



McKenzie County Profile

Since 2010, McKenzie County, North Dakota has experienced an unprecedented expansion of the oil and gas industry. As a result, the county has witnessed dramatic changes in population and rapid economic growth. However, since 2015, population growth and other indicators have stabilized and moderated.

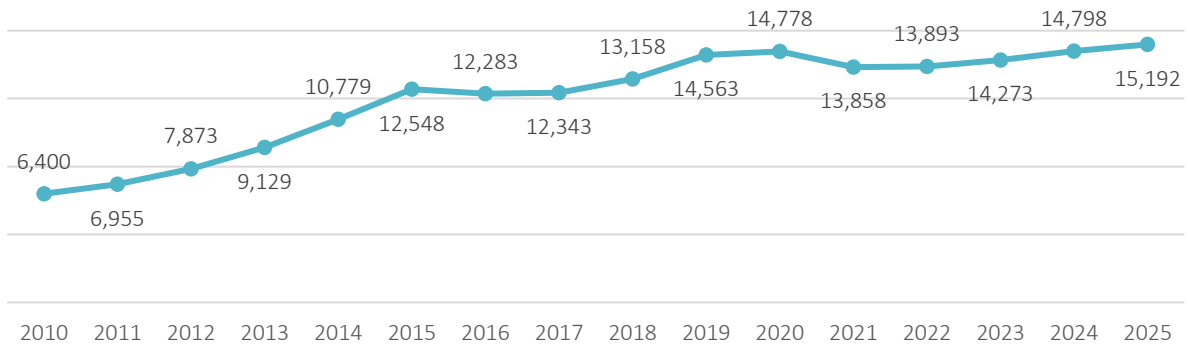
Population Characteristics

McKenzie County data presented in the following tables and graphs illustrate recent population trends as well as the change in size, composition, and demographic characteristics of the county's population.

The population of McKenzie County increased from 6,400 people in 2010 to 15,192 people in 2025, an increase of 137.4 percent (**Figure 2**). North Dakota also experienced rapid growth during this time, increasing from 675,097 residents in 2010 to 799,358 residents in 2025, an increase of 18.4 percent (**Figure 3**).

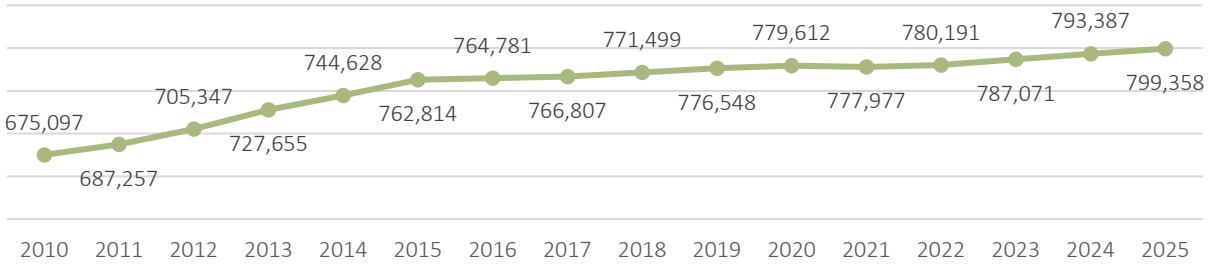
Population growth since 2019 has stabilized and growth has moderated. With the exception of a slight decline in 2021 as a result of the COVID-19 pandemic, McKenzie County has experienced moderate and consistent population growth of 3 to 4 percent annually (**Figure 3**).

Figure 2. Total Population of McKenzie County, North Dakota 2010 to 2025



Source: U.S. Census Bureau (2024; 2026a)

Figure 3. Total Population of North Dakota, 2010 to 2025



Source: U.S. Census Bureau (2024; 2026b)

The largest percentage growth in population by age from 2020 to 2025 was for individuals age 65 and older with an increase of 27 percent (1,255 people to 1,594 people) followed by those ages 5 to 17 at 11.1 percent (3,026 people to 3,262 people) (**Figure 4**). The substantial increase in population age 65 and older is consistent with state-wide trends associated with the aging forward of baby-boomers. The increase in population ages 5 to 17 is the result of significant population increase and in-migration associated with the expansion of the oil and gas industry from 2010 to 2015. The largest percentage loss in population was in children under the age of 5 at -11.7 percent (1,409 people to 1,244 people). The prime working age population declined slightly from 2020 to 2025, with a percentage loss of -6.7 in adults ages 18 to 24 (1,263 people to 1,178 people), and no percentage change in adults ages 25 to 44.

Figure 4. Population and Percent Change by Age, McKenzie County, 2020 and 2025

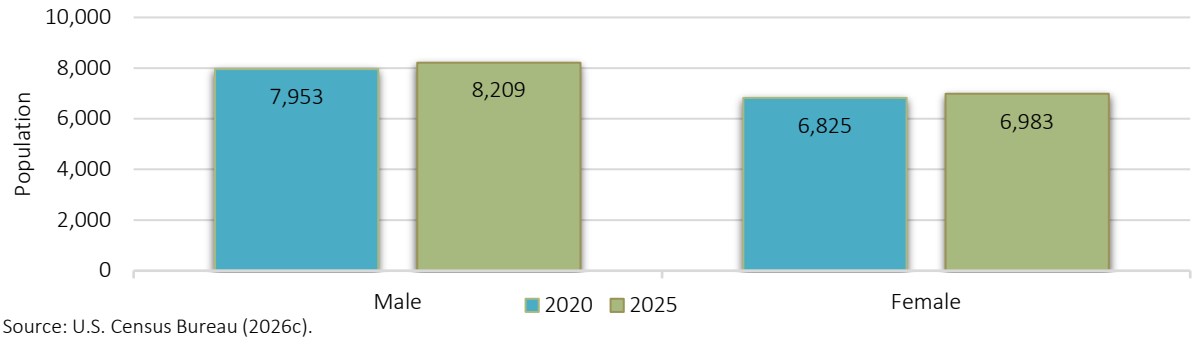


	Under 5	5 to 17	18 to 24	25 to 44	45 to 64	65 and Older
2020	1,409	3,026	1,263	4,808	3,017	1,255
2025	1,244	3,362	1,178	4,806	3,008	1,594

Sources: U.S. Census Bureau (2026c)

The population of McKenzie County was skewed male in 2025 (54 percent male compared to 46 percent female) (**Figure 5**). The distribution has not changed much since 2020, when the county's population was 53.8 percent male and 46.2 percent female. The male skew in this region of North Dakota is due to the creation of high paying jobs as a result of the expansion of the oil and gas industry, and the general predominance of males in that field of work.

Figure 5. Population by Gender, McKenzie County, 2020 and 2025

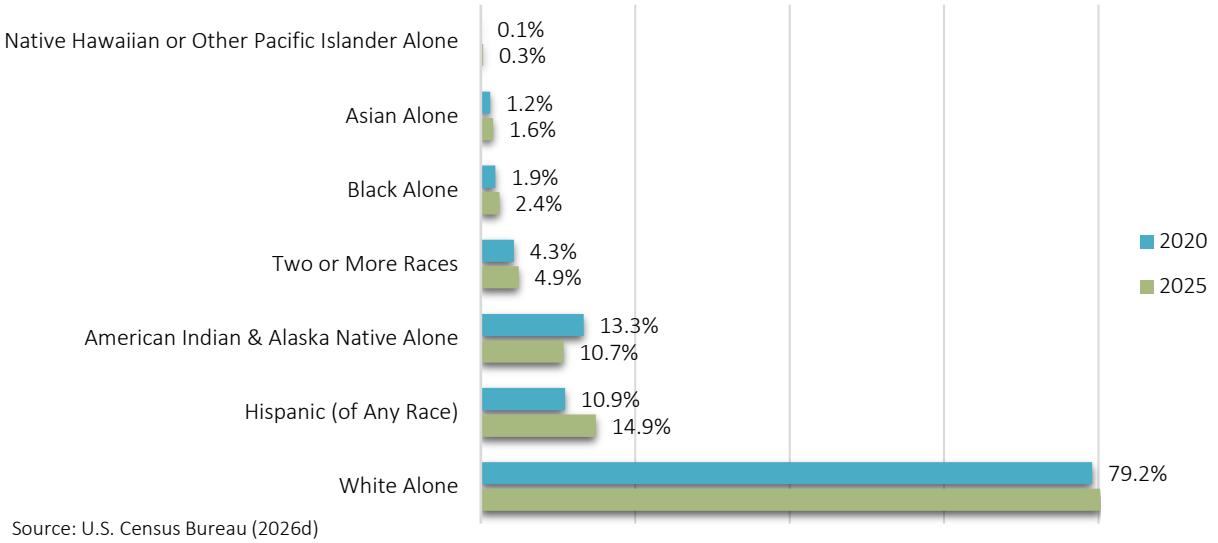


Source: U.S. Census Bureau (2026c).

During the 2010s McKenzie County's population rapidly diversified. The number of Hispanic or Latino (of any race) and Black residents increased substantially from 2010 to 2020 (U.S. Census Bureau, 2010; U.S. Census Bureau, 2020). Since 2020 the racial and ethnic composition of McKenzie County has stabilized.

From 2020 to 2025, the only changes in racial or ethnic composition that accounted for a shift of more than 1 percent were in the American Indian & Alaska Native population, which declined from 13.3 percent of the county's population to 10.7 percent, and in the Hispanic (of any race) population, which increased from 10.9 percent of the county's population to 14.9 percent (**Figure 6 and Figure 7**). At 80.2 percent, the county's overall racial/ethnic makeup remains predominately White.

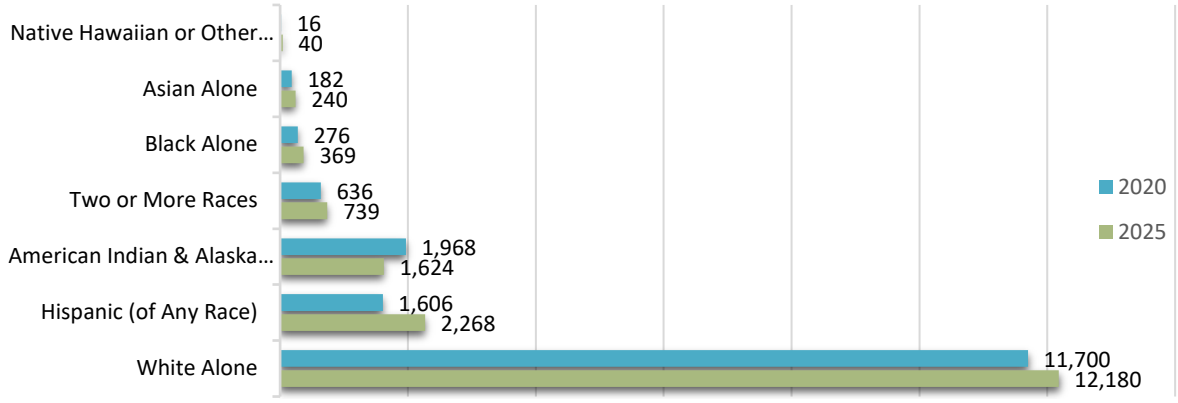
Figure 6. Population by Race and Hispanic Origin* as a Percentage of Total Population, McKenzie County, 2020 and 2025



Source: U.S. Census Bureau (2026d)

*Note: As Hispanic (of Any Race) is an ethnic category rather than a racial one, total will be greater than 100 percent.

Figure 7. Population by Race and Hispanic Origin, McKenzie County, 2020 and 2025

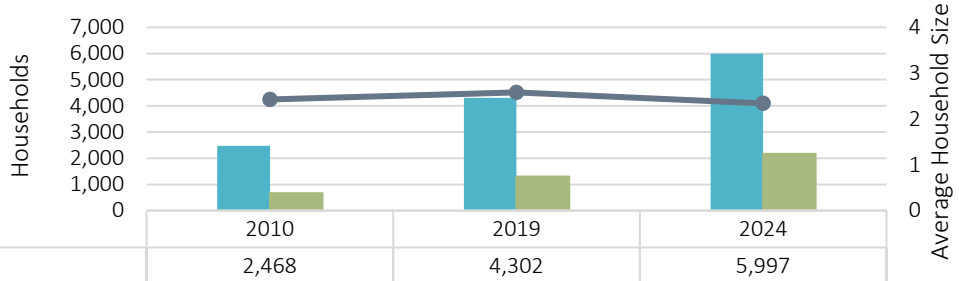


Source: U.S. Census Bureau (2026d)

Household Characteristics

The number of households in McKenzie County nearly doubled from 2010 to 2020, increasing from 2,468 in 2010 to 4,302 in 2019. Since 2019, the number of households has continued to increase, increasing to 5,997 households, a 39.4 percent increase. Households with children ages 0 to 17 have also increased rapidly (**Figure 8**). In 2010 there were 669 households with children compared to 1,298 households in 2019 and 2,171 in 2024. The average household size also increased from 2.43 persons per household in 2010 to an average size of 2.58 in 2019, but has subsequently decreased to 2.34 as of 2024.

Figure 8. Household Characteristics, McKenzie County, 2010, 2019, and 2024

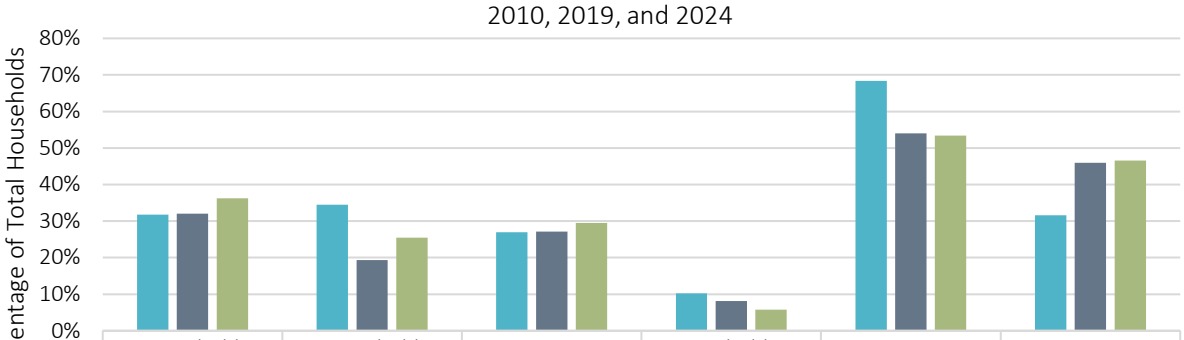


	2010	2019	2024
Total households	2,468	4,302	5,997
Households with children (age 0-17)	669	1,298	2,171
Average household size	2.43	2.58	2.34

Source: U.S. Census Bureau (2026e)

The shift in the total numbers of households, number of households with children, and household size between 2019 and 2024 has coincided with shifts in other household characteristics as well. The percentage of households with children ages 0 to 17 increased from 32.0 percent in 2019 to 36.2 percent in 2024 (**Figure 9**). The percentage of households with a householder age 65 or older living alone decreased from 8.1 percent to just 5.8 percent. The percentage of total householders living alone increased from 27.1 percent to 29.5 percent. The percentage of households with adults age 60 and older has shifted from 34.5 percent in 2010 to 19.3 percent in 2019 to 25.5 percent in 2024. This change is due largely to the substantial in-migration of younger people and the subsequent population growth. The percentage of housing units that are owner occupied continued to decline, from 68.4 percent in 2010 and 54.0 percent in 2019 to 53.4 percent in 2024. The percentage of housing units that are renter occupied continued to increase, from 31.6 percent in 2010 and 46.0 percent in 2019 to 46.6 percent in 2024.

Figure 9. Household Types as a Percentage of Total Households, McKenzie County, 2010, 2019, and 2024



	Households with children (age 0-17)	Households with older adults (age 60+)	Householders living alone	Householders (age 65+) living alone	Owner-occupied households	Renter-occupied households
2010	31.8%	34.5%	27.0%	10.2%	68.4%	31.6%
2019	32.0%	19.3%	27.1%	8.1%	54.0%	46.0%
2024	36.2%	25.5%	29.5%	5.8%	53.4%	46.6%

Sources: U.S. Census Bureau (2026e)

Youth Characteristics

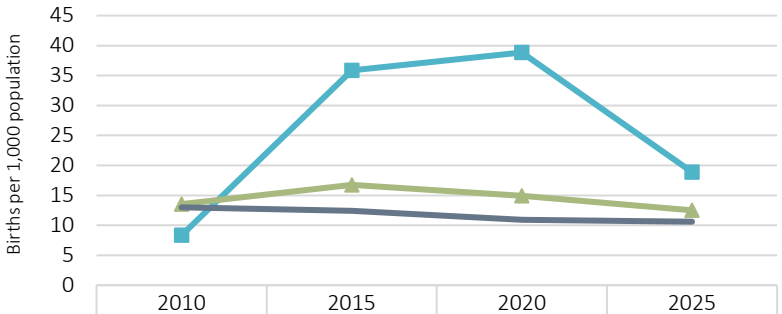
The birth rate (total number of live births per 1,000 population) in McKenzie County more than quadrupled from 2010 to 2020, increasing from 8.3 to 38.8 births per 1,000 population, but has declined in the subsequent five years to 18.9 in 2025 (**Figure 10**). The birth rate in McKenzie County however remains higher than North Dakota overall and the United States, 18.9 percent compared to 12.5 and 10.6 percent, respectively. The number of live births in the McKenzie County increased from 53 births in 2010 to 287 births in 2025 (**Table 1**).

Table 1. Live Births in McKenzie County, 2010 to 2025

Year	Number of Births
2010	53
2015	228
2020	247
2025	287

Source: North Dakota Department of Health and Human Services (2026)

Figure 10. Birth Rates for McKenzie County, North Dakota, and United States, 2010 to 2025

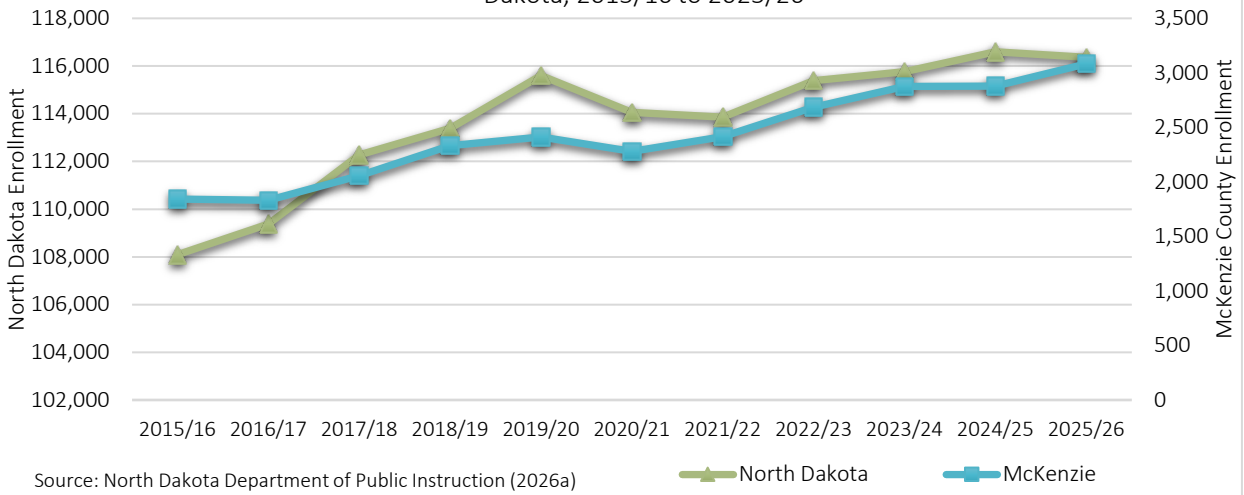


	2010	2015	2020	2025
McKenzie County Birth Rate	8.3	35.9	38.8	18.9
North Dakota Birth Rate	13.5	16.8	14.9	12.5
United States Birth Rate	13.0	12.4	10.9	10.6

Sources: North Dakota Department of Health and Human Services (2026); National Institutes of Health (2024); Centers for Disease Control and Prevention (2026)

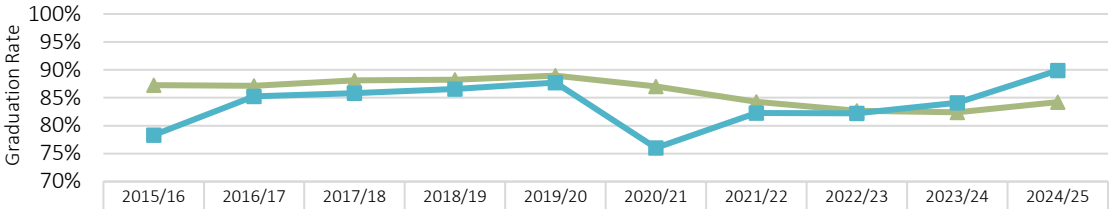
Public school enrollment has increased steadily in McKenzie County and statewide since the 2015/16 school year, with the exception of a decline in enrollment in 2020/21. The average number of students enrolled per day in McKenzie County and North Dakota public schools dropped in 2020/21, coinciding with the COVID-19 pandemic. Since then, public school enrollment in McKenzie County has increased consistently. Average daily enrollment has increased by 67 percent countywide and 8 percent statewide from 2015/16 to 2025/26 (**Figure 11**).

Figure 11. Average Daily Enrollment for Public Schools in McKenzie County and North Dakota, 2015/16 to 2025/26



Source: North Dakota Department of Public Instruction (2026a)

Figure 12. High School Graduation Rates for McKenzie County and North Dakota, 2015/16 to 2024/25



	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25
North Dakota	87.3%	87.2%	88.1%	88.3%	89.0%	87.0%	84.3%	82.7%	82.4%	84.2%
McKenzie County	78.4%	85.3%	85.8%	86.6%	87.7%	76.0%	82.3%	82.2%	84.1%	89.9%

Source: North Dakota Departmnet of Public Instruction (2026b)

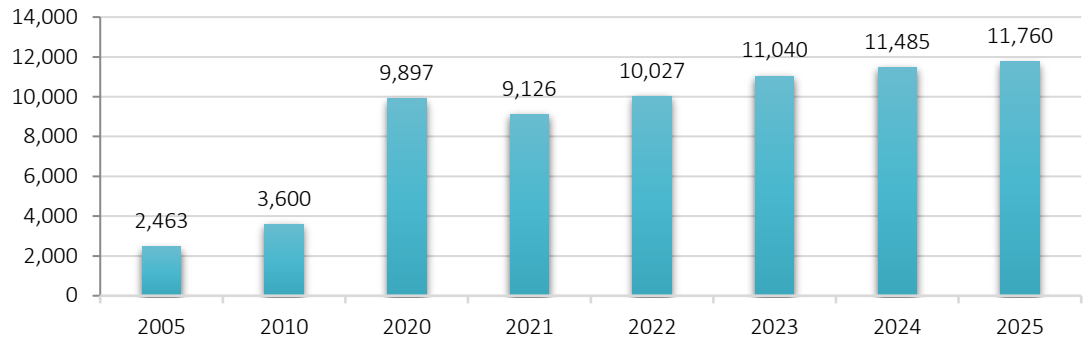
Following a substantial drop in high school graduation rates to 76.0 percent in 2020/21 as a result of the COVID-19 pandemic, graduation rates returned to rates more similar to pre-pandemic rates by 2023/24. Graduation rate rebounded to 82.3 percent in 2021/22, and 82.2 percent in 2022/23, and rose to 84.1 percent in 2023/24 (**Figure 12**). North Dakota's graduation rate, by contrast, remained relatively stable through 2019/20, ranging from 87.2 to 89.0 percent, but has since declined to 84.3 percent in 2021/22, 82.7 percent in 2022/23, and 82.4 percent in 2023/24 before rising to 84.2 percent in 2024/25. As a result, McKenzie County's graduation rate has converged with the statewide average and, in 2023/24, surpassed it for the first time in this period—a trend continuing in 2024/25 and a reversal from 2020/21, when the county's graduation rate fell well below the state graduation rate.

Economic Characteristics

Total employment for McKenzie County grew substantially from 2005 to 2025 (**Figure 13**). Employment data for this report were obtained from the Quarterly Census of Employment and Wages (QCEW) program administered by Job Service North Dakota – and reflects the total number of jobs averaged over a year. QCEW does not include sole proprietors and self-employed, railroad workers, family farm workers, full-time students working for their school, elected government officials, and a few other minor employment types. While the list of excluded jobs in the QCEW may seem rather lengthy, QCEW represents 90 percent or more of wage and salary jobs in most geographies.

The dramatic increase in employment as a result of expansion in the oil and gas industry is well documented. McKenzie County saw a 377 percent increase in employment from 2,463 jobs in 2005 to 11,760 jobs in 2025. Employment dipped slightly in 2021 from 9,897 jobs in 2020 to 9,126 jobs in 2021, a decline coinciding with the impact of the COVID-19 pandemic and a broader slowdown in the oil and gas industry. However, employment rebounded in 2022 and 2023 increasing by roughly 10 percent annually to 10,027 and 11,040 jobs, respectively. Since 2023 employment increased by 4.0 percent in 2024 to 11,485 and 2.0 percent in 2025 to 11,760 jobs.

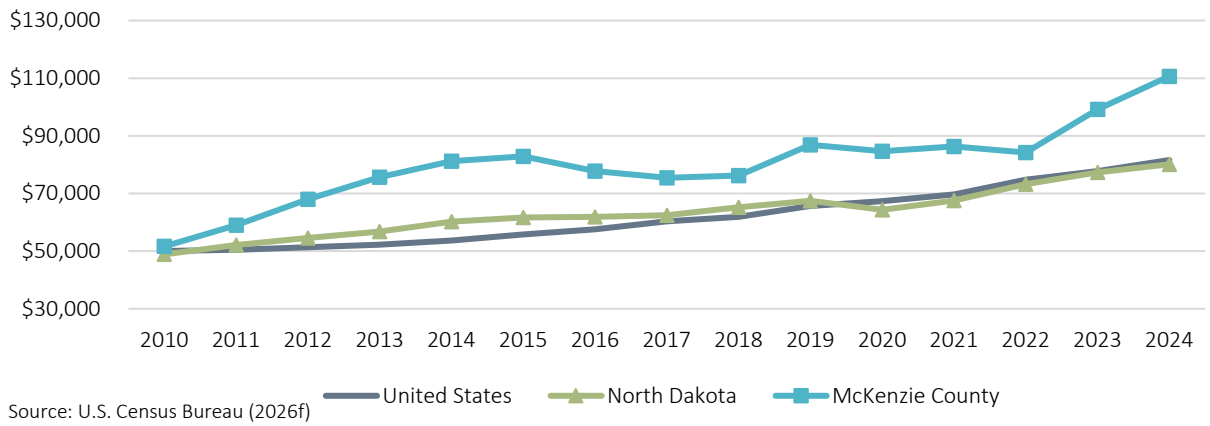
Figure 13. Average Number of Jobs, McKenzie County, 2005 to 2025



Source: U.S. Bureau of Labor Statistics (2026)

Median household income in McKenzie County increased from $51,641 in 2010 to $110,682 in 2024. These are published annual Census SAIPE estimates in current dollars, without adjustment for inflation. The estimate was $82,906 in 2015, $84,705 in 2020, $84,206 in 2022, and $99,157 in 2023 (**Figure 14**). In 2024, the county estimate exceeded the North Dakota median of $80,132 and the United States median of $81,604. Household income includes income of the householder and all other people ages 15 and older in the household, whether or not they are related. Differences over time reflect changes in both income and prices.

Figure 14. Median Household Income, McKenzie County, North Dakota, and United States, 2010 to 2024 (current dollars)

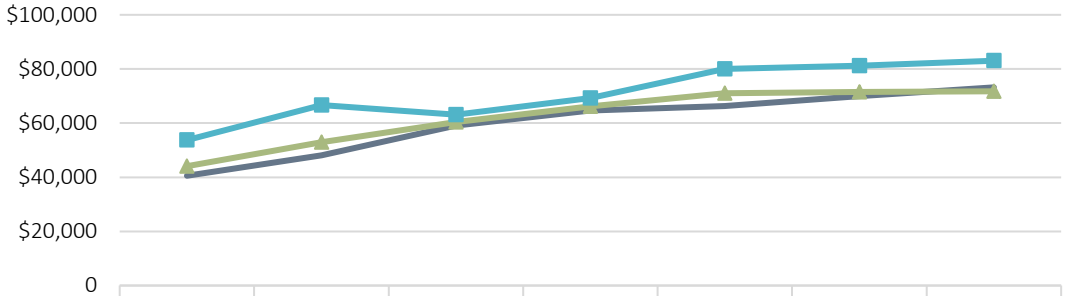


Source: U.S. Census Bureau (2026f)

McKenzie County per capita personal income increased from $53,726 in 2010 to $83,041 in 2024 (**Figure 15**). Estimates from the U.S. Bureau of Economic Analysis (BEA) indicate that per capita personal income in McKenzie County was $66,624 in 2015, $63,146 in 2020, $69,286 in 2021, $80,015 in 2022, and $81,224 in 2023. In 2024, McKenzie County exceeded North Dakota at $71,749 and the United States at $73,204. All amounts are in current dollars, without inflation adjustment. Per capita personal income is

BEA's published measure of residents' personal income divided by population; it includes earnings, proprietors' income, dividends, interest, rents, and government benefits.

Figure 15. Per Capita Personal Income, McKenzie County, North Dakota, and United States, 2010 to 2024 (current dollars)



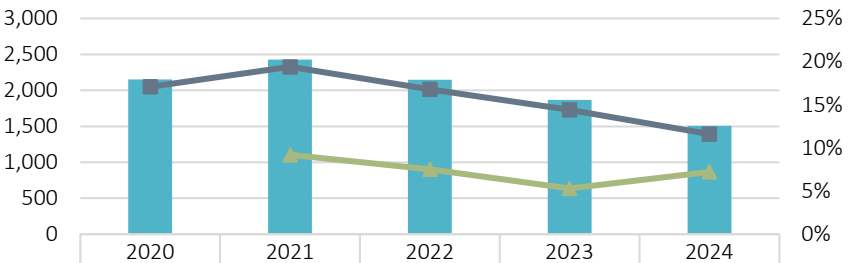
	2010	2015	2020	2021	2022	2023	2024
United States	$40,557	$48,062	$59,151	$64,692	$66,298	$70,002	$73,204
North Dakota	$44,081	$52,972	$60,447	$66,158	$71,011	$71,545	$71,749
McKenzie County	$53,726	$66,624	$63,146	$69,286	$80,015	$81,224	$83,041

Source: U.S. Bureau of Economic Analysis (2026)

Insurance Characteristics

Health insurance is critical to ensuring access to health care. Uninsured individuals are less likely to receive care and are therefore at risk of more serious health conditions. In McKenzie County, both the number and percent of residents under age 65 without health insurance rose between 2020 and 2021, from 17.1 percent (2,152 residents) to 19.4 percent (2,428 residents), before declining steadily each year through 2024 to 11.6 percent (1,507 residents) (**Figure 16**). Uninsured children (ages 0 to 18) in McKenzie County followed a similar pattern: the uninsured rate rose from 22.3 percent (1,025 children) in 2020 to a peak of 24.4 percent (1,094 children) in 2021, then declined steadily to 13.4 percent (597 children) by 2024 (**Figure 17**). While the uninsured rate for children statewide has declined substantially since 2021, the number of uninsured children in McKenzie County is substantially higher than the statewide average, nearly twice as high as statewide rate for uninsured children in 2024, 13.4 percent compared to 6.7 percent statewide.

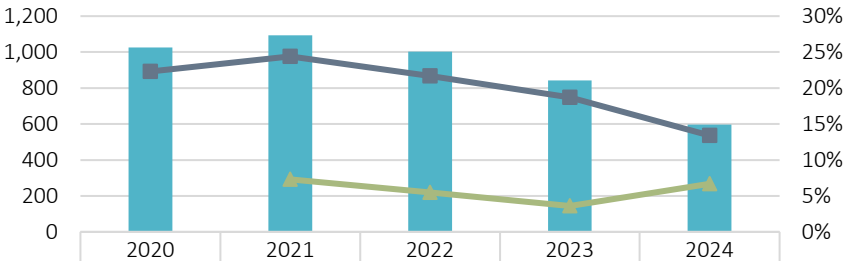
Figure 16. Residents Under Age 65 Without Health Insurance, McKenzie County and North Dakota, 2020 to 2024



	2020	2021	2022	2023	2024
McKenzie County #	2,152	2,428	2,148	1,867	1,507
McKenzie County %	17.1%	19.4%	16.8%	14.4%	11.6%
North Dakota %		9.2%	7.5%	5.3%	7.2%

Source: U.S. Census Bureau (2026g)

Figure 17. Uninsured Children Ages 0 to 18, McKenzie County and North Dakota, 2020 to 2024



	2020	2021	2022	2023	2024
McKenzie County #	1,025	1,094	1,003	843	597
McKenzie County %	22.3%	24.4%	21.7%	18.7%	13.4%
North Dakota %		7.3%	5.5%	3.6%	6.7%

Sources: U.S. Census Bureau (2026g)

McKenzie Health Profile

McKenzie Health is a nonprofit independent health system that was formed in 2004 from the merger of the Good Shepherd Home Corporation and the McKenzie County Memorial Hospital Corporation. The merger consolidated health care in McKenzie County. In addition to services in Watford City, McKenzie Health also provides specialty clinical services in Williston, Minot, New Town, Tioga, and Stanley. McKenzie Health also serves the communities of Arnegard, Alexander, Grassy Butte, Alexandra, and Keene, all in McKenzie County, North Dakota.

McKenzie Health operates a trauma level IV, 24 bed critical access hospital. In February of 2026, McKenzie Health was for the first time named a Chartis Top 100 Critical Access Hospital. The designation recognizes top performing rural hospitals across the United States and is regarded as one of the industry's most significant designations. The system offers emergency and acute care, primary and family care, pediatrics and OBGYN, surgical and specialty services, and diagnostics and support including radiology and imaging, and physical, occupational, and speech therapy. In addition to hospital and clinical services, McKenzie Health operates Good Shepherd Home, a 48-bed long term care facility; Horizon Assisted Living, a 15-apartment assisted living facility; and the Connie Wold Wellness Center which also houses McKenzie Health physical and occupational services.

McKenzie Health has grown and expanded services in Williston and Minot. McKenzie Health Williston has two locations in Williston providing urgent and walk-in clinic, orthopedics, imaging and labs, primary care, family medicine, obstetrics and gynecology, general surgery consultations, and physical therapy. In Minot, McKenzie Health provides specialized and rapid access orthopedic services and MRI imaging.

In 2025, major improvements were made to both Horizon Assisted Living and Good Shepard Home. Improvements included a kitchen renovation at Horizon Assisted Living and a Greenhouse, Chapel, and Courtyard expansion adjacent to Horizon Assisted Living and Good Shepard Home. The renovations were fully funded by almost $3 million in donations. The Greenhouse is an especially noteworthy addition; it is the only one of its kind in North Dakota.

In addition to the new facilities, McKenzie Health has expanded its health care services and expertise. In 2023, McKenzie health expanded women and children's health services including labor and delivery services. The increase in the number of births at McKenzie Health since the expansion of those services demonstrates the importance of labor and delivery services. The number of births has increased from 66 in 2023, to 99 in 2024, and 111 in 2025. There were 124 births through July of 2026, with total projected number of births for 2026 of approximately 200.

McKenzie Health provides the following services:

- Allergy and Immunology
- Cardiology
- Gastroenterology
- General Surgery
- Interventional Radiology
- Obstetrics and Gynecology
- Oncology
- Orthopedics and Orthopedic Surgery
- Pain Management
- Pediatrics
- Pediatric Therapy
- Pulmonology
- Adult Therapy
- Sports Medicine and Athletic Training
- Urology
- Assisted Living
- Cardiac Rehab
- Physical Therapy
- Echocardiography
- Pulmonary Rehab
- Emergency Services
- Radiology
  - MRI
  - CT
  - X-Ray
  - US
  - Dexa
  - Mammography
- Hospitalist Services
- Birthing Unit
  - C-sections
- Respiratory Therapy
- Inpatient Pharmacy
- Respite Care
- Infusion Therapy
- Laboratory Services
- Rural Health Clinic
- Nursing
- Nutrition Services
- Occupational Therapy
- Swing Bed Program
- Pain Management
- Wellness Center
- Speech Therapy

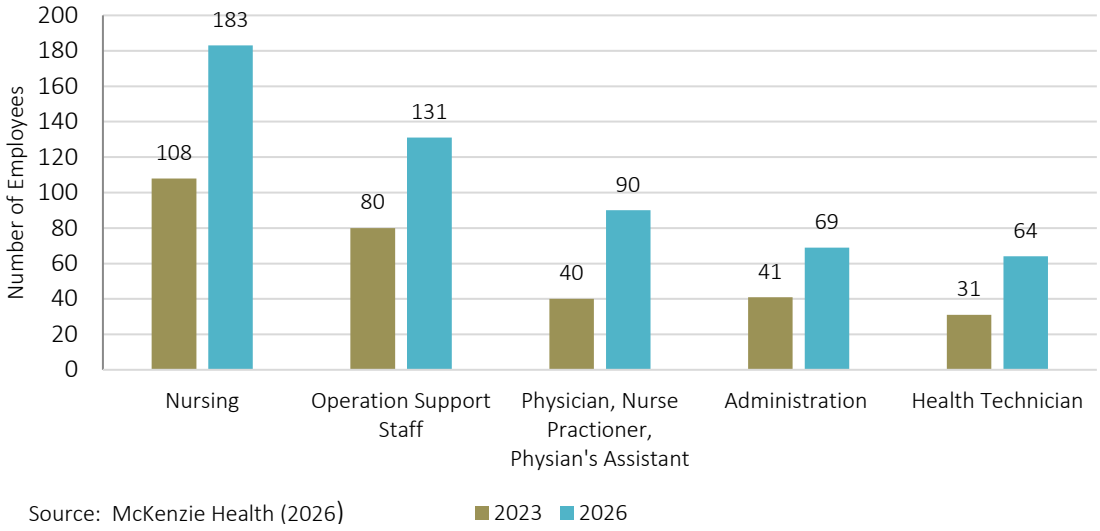
McKenzie Health is the largest employer in McKenzie County (North Dakota Job Service, 2026). McKenzie Health currently employs 537 people (**Table 2**), including 90 physicians, physicians' assistants, and nurse practitioners; 183 CNA's, RN's and LPN's; and 64 health technicians (including positions such as radiology technologist, pharmacy tech, physical therapist, and surgical technician) (**Figure 18**). Nearly two-thirds of McKenzie Health employees are full-time employees (65 percent) (**Table 2**).

Table 2. Employment Counts, McKenzie Health, January 2023 and August 2026

Employment Type	Number of Employees	
	2023	2026
Contracted	58	86
Full Time	192	349
Part Time	21	37
PRN/As Needed[1]	36	65
Total	307	537

Source: McKenzie Health (2026)
[1]PRN employees work as needed without a fixed schedule

Figure 18. McKenzie Health Employment, by Employment Category, January 2023 and August 2026



Source: McKenzie Health (2026)

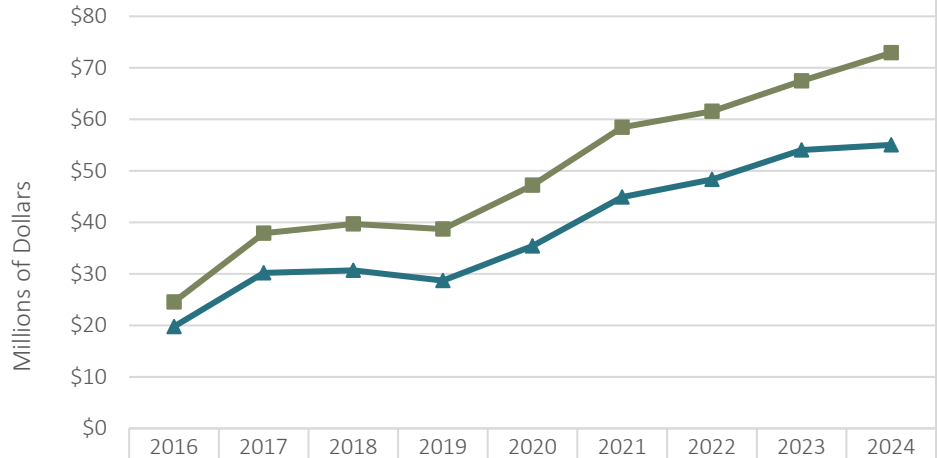
McKenzie County Health Care Sector

IMPLAN baseline data from 2016 to 2024 can be used to estimate the economic activity (direct output) of the overall Health Care and Social Assistance Sector in McKenzie County, North Dakota. Health care services are comprised of 13 individual economic sectors. Summing the output from those 13 sectors provides an estimate of total economic activity or gross revenue from Healthcare and Social Assistance. Because McKenzie Health operates the Connie Wold Wellness Center, economic output from the Health Care and Fitness sector are also included in the estimate of economic output of the Health Care and Social Assistance sector in McKenzie County. The 13 economic sectors that comprise the Health Care and Social Assistance sector and the Health Care and Fitness sector are summed to create comparable metrics to describe what percentage of total county economic output for Health Care and Social Assistance are attributable to McKenzie Health.

Gross revenues (output) for the Health Care and Social Assistance Sector and Fitness and Recreation Sports Centers Sector in McKenzie County have increased substantially in the past five years. Revenues (economic activity) in the Health Care and Social Assistance Sector and Recreation and Sports Centers Sector in McKenzie County increased from $47.2 million in 2020 to $72.9 million in 2024. Sector revenues have grown dramatically since 2016, increasing from $24.5 million in 2016 to $72.1 million in 2024, an increase of 194 percent in the past nine years (IMPLAN Group LLC., 2025).

McKenzie Health operates in several of the economic sectors that comprise the Health Care and Social Assistance Sector and the Recreation and Sports Centers Sector in McKenzie County. Growth of health care sectors associated with McKenzie Health also increased substantially in the past five years. Economic output associated with specific sectors aligned with activities and services provided by McKenzie Health grew from $35.4 million in 2020 to $55.0 million in 2020, a 55.4 percent increase (**Figure 19**).

Figure 19. Total Output of all Health Care and Social Assistance Sectors and McKenzie Health Sectors, 2016 to 2024

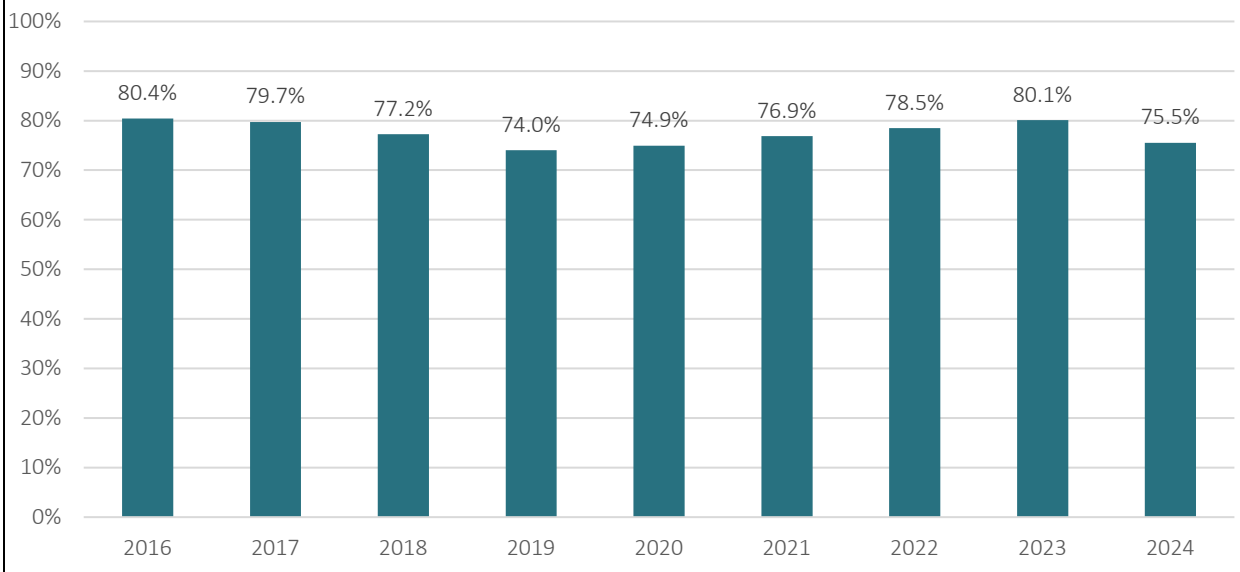


	2016	2017	2018	2019	2020	2021	2022	2023	2024
All Health Care and Social Assistance Sectors in McKenzie County (NAICS 62) and Health Care and Fitness (Industry Code 487)	$24.6	$37.9	$39.7	$38.7	$47.2	$58.4	$61.6	$67.5	$72.9
McKenzie Health Sectors1	$19.8	$30.2	$30.7	$28.7	$35.4	$44.9	$48.3	$54.0	$55.0

[1] Offices of Physicians (465), Outpatient care centers (468), Medical and diagnostic laboratories (469), Home health care services (470), Hospitals (472), Nursing and community care services (473), Fitness and recreational sports centers (487). NAICS: North American Industry Classification System (https://www.census.gov/naics/)
Source: IMPLAN Group LLC (2025)

The sectors that align with McKenzie Health operations is responsible for about three-fourths of all health care services output in McKenzie County. Economic output from sectors that align with McKenzie Health operations as a percentage of all health care service sectors has remained relatively stable in the past five years ranging from 75 to 80 percent of all health care services in McKenzie County (IMPLAN Group LLC., 2025 (**Figure 20**).

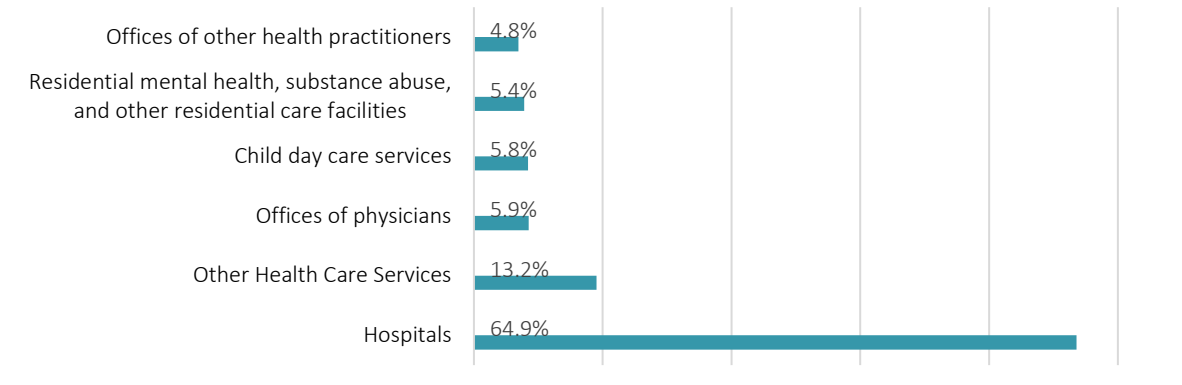
Figure 20. McKenzie Health Sectors as a Percentage of All Health Care and Social Assistance Sectors, Economic Output, McKenzie County, 2016 to 2024



Source: IMPLAN Group LLC (2025)

Economic output associated with hospitals makes up the largest portion of revenues associated with the Health Care and Social Assistance Sector. Total output for hospitals in McKenzie County was $46.8 million, nearly two-thirds of all output in the Health Care and Related Services Sector in McKenzie County (**Figure 21, Table 3**). Offices of physicians and child care services made up 5.9 and 5.8 percent of economic output, respectively. Economic output from all sectors increased substantially from 2020 to 2025. Hospital revenue increased by 69.9 percent. Output for child care services and offices of other health care services increased by 48.5 percent and 32.1 percent, respectively. While output for offices of physicians declined by 29.6 percent, output for offices of other health care practitioners increased by 32.1 percent **(Table 3)**. These shifts are likely due to changes in IMPLAN sectors and other methodologies. (See the section on Input-Output Modeling of this report for more information on changes to IMPLAN methodologies.)

Figure 21. Total Output and Percentage of Total Output of Various Components of the Health Care and Social Assistance Sector, McKenzie County, 2024



Source: IMPLAN Group LLC (2025)

Table 3. Total Output, Health Care and Social Assistance Sectors, McKenzie County, 2020 to 2024

	2020	2021	2022	2023	2024	Sector as Percentage of 2024 Total	Change 2020-2024
	----------000s $----------					----------% ---------	
Hospitals	$24,199	$30,943	$32,900	$36,909	$46,794	64.9%	93.4%
Office of Physicians	$6,025	$8,807	$8,450	$10,539	$4,244	5.9%	-29.6%
Child Care Services	$2,827	$3,308	$3,874	$4,176	$4,199	5.8%	48.5%
Residential Mental Health, Substance Abuse, Other Residential	--	--	$813	$573	$3,903	5.4%[2]	380.3%
Offices of Other Health Care Practitioners	$2,609	$2,638	$2,879	$2,990	$3,446	4.8%	32.1%
Other Health Care and Services[1]	$10,812	$11,530	$11,247	$11,019	$9,522	13.2%	-11.9%

[1] Other ambulatory health care, nursing and community care facilities, individual and family services, offices of dentists, outpatient care centers, community food, housing, and other relief services, medical and diagnostic laboratories; home health care services.
[2]Percentage change from 2022. Source: IMPLAN Group LLC (2025)

Federal government transfer payments to individuals for medical benefits comprise a substantial portion of all government transfer payments in McKenzie County. Medical benefits from Medicare and Medicaid

make up the majority of transfer payments in McKenzie County. From 2012 to 2022, transfer payments for medical benefits comprised 39 to 45 percent of all transfers payments to individuals in McKenzie County (**Figure 22**). Transfer payments for medical benefits as a percentage of total transfer payments dropped to 24 percent in 2020 and 30.0 percent in 2021 (U.S. Bureau of Economic Analysis, 2026) (**Table 4** and **Figure 22**). The decline in payments for medical benefits as a percentage of total transfer payments was due to the extraordinary increase in unemployment compensation benefits as a result of job losses associated with the COVID-19 pandemic. Transfer payments for medical benefits are an important revenue stream for health care providers. Government transfer payments for medical benefits, which represent payments and revenue are included in the assessment of economic effects associated with McKenzie Health operations. Those revenue streams are part of McKenzie Health total revenue.

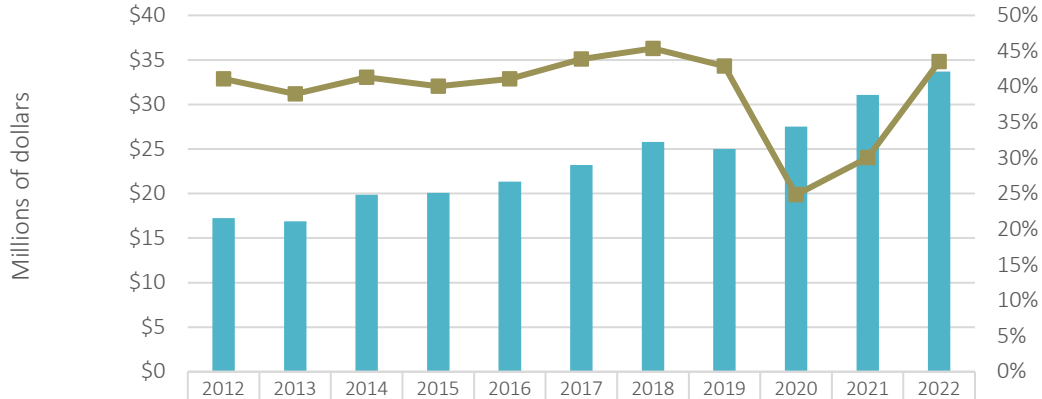
The U.S. Bureau of Economic Analysis (BEA) discontinued reporting personal current federal government transfer payments previously detailed in BEA Table CAIN35 in July of 2024. Data from 2022 are the most recent available through archived records.

Table 4. Transfer Payments, McKenzie County and North Dakota, 2022

	McKenzie County		North Dakota	
	------000s $---	-----%-----	------000s $---	------%----
Retirement and Disability	$25,593	33.1%	$2,791,304	36.1%
Medical Benefits	$33,696	43.5%	$3,468,468	44.9%
Medicare	$17,144		$1,823,683	
Medicaid	$16,237		$1,586,443	
Military Medical Insurance Benefits	$315		$58,342	
Income Maintenance Benefits	$8,122	10.5%	$599,700	7.8%
Unemployment Insurance Compensation[1]	$1,160	1.5%	$59,880	0.8%
Other Transfer Reciepts[2]	$8,867	11.5%	$805,492	10.4%
Total Transfer Receipts[3]	$77,438	100.0%	$7,724,844	100.0%

[1]Unemployment benefits as a percentage of total payments increased dramatically in 2020 as a result of unemployment due to COVID-19. [2]Veterans benefits, Education and training assistance, other transfer payments [3]Transfer receipts of individuals only. Does not include transfer receipts of nonprofit institutes or individuals from businesses Source: U.S. Bureau of Economic Analysis (2026)

Figure 22. Transfer Payments for Medical Benefits, McKenzie County, 2012 to 2022



	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Medical benefits $000s	$17.2	$16.9	$19.9	$20.1	$21.3	$23.2	$25.8	$25.0	$27.5	$31.1	$33.7
Percent of Transfer Payments	41.1%	39.0%	41.3%	40.1%	41.1%	43.9%	45.4%	42.9%	24.8%	30.0%	43.5%

U.S. Bureau of Economic Analysis (2026)

Direct Economic Effects

McKenzie Health provided financial information to create a custom economic profile (industry balance sheet) within the IMPLAN modeling system for the McKenzie County and Williams County economies. The economic sector profile represents the direct effects used to estimate indirect and induced economic effects.

Economic output is equal to revenues and is a measure of economic activity that describes direct economic effects. Direct economic effects are first round payments for services, labor, and other inputs to operations.

In McKenzie County, McKenzie Health had direct economic output (gross revenue) of $62.7 million in 2026 (**Table 5**). In Williams County, the direct economic output was $16.4 million (**Table 6**). Economic output in McKenzie County is projected to increase to $73.1 million in 2027 (**Table 5**) and Williams County is projected to increase to $19.1 million in 2027 (**Table 6**).

Of the $62.7 million in output in McKenzie County, $46.4 million was for payroll, $31.9 million for intermediate inputs, and the remainder represented taxes and other property type income. Of the $16.4 million in output in Williams County, $4.2 million was for payroll, $1.9 million for intermediate outputs, and the remainder represented taxes and other property type income (**Table 6**).

In McKenzie County, employment compensation for 2026 was $46.3 million and supported 370 jobs. In 2027, employment compensation in McKenzie County is projected to increase to $68.2 million, with direct employment increasing to 408 jobs (**Table 5**). In Williams County, employment compensation for 2026 was $4.2 million and supported 60 jobs. In 2027, employment compensation in Williams County is projected to increase to $5.2 million, with direct employment increasing to 67 jobs (**Table 6**).

Table 5. Economic Profile, McKenzie Health, McKenzie County, North Dakota, 2026 and 2027 (projected)		
	2026	2027 (projected)
	-------- 000s $ ------	
Economic Output (Revenues)	$62,655	$73,056
Employment[1,2]	370	408
Employment Compensation (Wages, Salaries and Benefits)	$46,335	$68,225
Tax on Production and Imports (TOPI)	$24	$25
Other property type income (OPTI)	*-$15,570*	*-$26,434*
Intermediate Inputs (Operation Expenses)[3]	$31,865	$31,240
Value-added (sum of labor income, OPTI, and TOPI)	$30,790	$41,816

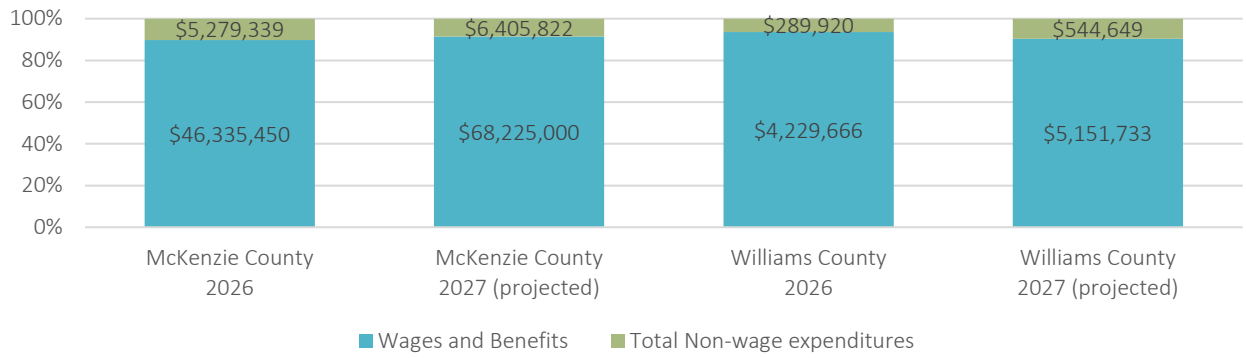
[1]Full- and part-time jobs
[2]Full-time jobs used in the economic assessment do not match employment reported in McKenzie Health employment summary in Table 2 and Figure 18. The differences in employment numbers are due to fluctuations in employment over time. Employment data for the economic assessment and McKenzie Health employment summary were collected at different times.
[3]Represents gross expenditures for inputs and services purchased by McKenzie Health.

Table 6. Economic Profile, McKenzie Health, Williams County, North Dakota, 2026 and 2027 (projected)		
	2026	2027 (projected)
	-------- 000s $ ------	
Economic Output (Revenues)	$16,392	$19,113
Employment[1,2]	60	67
Employment Compensation (Wages, Salaries and Benefits)	$4,230	$5,152
Tax on Production and Imports (TOPI)	$15	$21
Other property type income (OPTI)	$10,272	$10,279
Intermediate Inputs (Operation Expenses)[3]	$1,875	$3,661
Value-added (sum of labor income, OPTI, and TOPI)	$14,516	$15,452

[1]Full- and part-time jobs
[2]Full-time jobs used in the economic assessment do not match employment reported in the McKenzie Health employment summary in Table 2 and Figure 18. The differences in employment numbers are due to fluctuations in employment over time. Employment data for the economic assessment and the McKenzie Health employment summary were collected at different times.
[3]Represents gross expenditures for inputs and services purchased by McKenzie Health

Disbursements in McKenzie County in 2026 for wages and benefits were estimated at $46.4 million, and non-wage expenditures for inputs supplied by local firms were estimated at $5.3 million (**Figure 23**). McKenzie County projections for 2027 were $68.2 million for wages and benefits and $6.4 million for non-wage expenditures. In Williams County, disbursements for wages and benefits were estimated at $4.2 million in 2026, and non-wage expenditures were estimated at $289,920 (**Figure 23**). Williams County projections for 2027 were $5.2 million for wages and benefits and $544,649 for non-wage expenditures. Non-wage expenditures (intermediate inputs) represent outlays for operations, such as medical supplies, business services, utilities, and equipment. Only purchases from McKenzie County sources were used in the analysis.

Figure 23. Total In-County Expenditures, Mc Kenzie Health, McKenzie and Williams Counties, 2026 and 2027 (projected)



Secondary Economic Effects

Indirect and induced economic output (secondary effects) in McKenzie County for 2026 were estimated at $8.6 million and $6.1 million, respectively for total secondary economic effects of $14.7 million (**Table 7**). Secondary effects were estimated to support an additional 103 jobs and $5.0 million in labor income for total employment of 474 and total labor income of $51.4 million in 2026. Indirect and induced value-added (gross state product) effects in 2026 were estimated at $8.7 million.

Indirect and induced economic effects in McKenzie County for 2027 were projected at $8.2 million and $8.6 million, respectively for total secondary economic effects of $16.8 million. Secondary effects were projected to support an additional 92 jobs and $5.0 million in labor income for total employment of 499 and total labor income of $73.2 million in 2027. Indirect and induced value-added (gross state product) were projected at $9.7 million.

Table 7. Economic Effects, by Key Economic Metrics, Operations, McKenzie Health, McKenzie County, 2026 and 2027 (projected)

Type of Economic Effect	Employment[1]	Economic Output	Labor Income	Value-Added
		---------- 000s $ ----------		
	2026			
Direct	370	$62,655	$46,335	$30,790
Indirect	72	$8,638	$3,320	$4,787
Induced	31	$6,064	$1,727	$3,940
Total	474	$77,357	$51,382	$39,517
	2027 (Projected)			
Direct	408	$73,056	$68,225	$41,816
Indirect	47	$8,224	$2,567	$4,111
Induced	45	$8,607	$2,452	$5,592
Total	499	$89,887	$73,244	$51,519

[1]Total full- and part-time jobs and does not represent FTEs.

In Williams County, indirect and induced economic output from operations for 2026 were estimated at $826,000 and $2.1 million, respectively for total secondary economic effects of $2.9 million (**Table 8**). Secondary effects were estimated to support an additional 17 jobs and $952,000 in labor income for total employment of 77 and total labor income of $5.2 million in 2026. Indirect and induced value-added (gross state product) effects in 2026 were estimated at $1.8 million.

Indirect and induced economic effects from operations (output) in Williams County for 2027 were projected at $1.5 million and $2.8 million, respectively for total secondary economic effects of $4.3 million. Secondary effects from operations were projected to support an additional 25 jobs and $1.4 million in labor income for total employment of 92 and total labor income of $6.6 million in 2027. Indirect and induced value-added (gross state product) were projected at $2.6 million.

Table 8. Economic Effects, by Key Economic Metrics, Operations, McKenzie Health, Williams County, 2026 and 2027 (projected)

Type of Economic Effect	Employment[1]	Economic Output	Labor Income	Value-Added
		---------- 000s $ ----------		
	2026			
Direct	60	$16,392	$4,230	$14,516
Indirect	5	$826	$312	$462
Induced	12	$2,124	$640	$1,334
Total	77	$19,342	$5,182	$16,312
	2027 (Projected)			
Direct	67	$19,113	$5,152	$15,452
Indirect	9	$1,514	$559	$840
Induced	16	$2,812	$847	$1,766
Total	92	$23,439	$6,558	$18,058

[1]Total full- and part-time jobs and does not represent FTEs.

Capital Expenditures

McKenzie Health also provided financial information on capital expenditures. Capital expenditures represent payments for new construction, machinery, diagnostic equipment, furniture, and any other physical assets used by McKenzie Health that are not consumed in a single use. Economic effects from capital expenditures are not measured using the economic sector profile, and must be modeled as a stand-alone activity separate from operations. Only capital expenditures that represent a business transaction with a firm in McKenzie County were considered in this assessment of economic effects from capital expenditures. Economic effects from capital expenditures are one-time effects and do not accrue beyond the time-period associated with those capital investments.

No capital expenditures were reported for either McKenzie County or Williams County in 2026. However, there are substantial capital expenditures planned for McKenzie Health operations in Williams County in 2027. Economic effects for both McKenzie and Williams counties are reported, however, the economic effects will largely be in Williams County. Economic effects from capital expenditures in McKenzie County

will be minimal, and consist of spillover (indirect and induced) from capital expenditures made in Williams County.

Indirect and induced (secondary) effects from capital expenditures in McKenzie County in 2027 were projected to be $19,000. Secondary effects as a result of capital expenditures were projected to produce $5,000 in labor income in 2027 (Table 9).

Table 9. Economic Effects, by Key Economic Metrics, Capital Expenditures, McKenzie Health, McKenzie County, 2027 (projected)

Type of Economic Effect	Economic Output	Labor Income	Value-Added (GSP)
	---------- 000s $ ----------		
2027 (Projected)			
Direct (Capital Expenditures)	---	---	---
Indirect	$1	$0	$1
Induced	$18	$5	$12
Total	$19	$5	$13

Direct expenditures for capital improvement in Williams County are estimate to be $5.5 million. Direct capital expenditures will generate $1.8 million in secondary effects (indirect and induced). Total economic effects (direct, indirect, and induced) from capital improvements in Williams County were to be $7.4 million in 2027 (Table 10). Capital expenditures were projected to produce $3.1 million in total (direct and secondary) labor income in 2027.

Table 10. Economic Effects, by Key Economic Metrics, Capital Expenditures, McKenzie Health, Williams County, 2027 (projected)

Type of Economic Effect	Economic Output	Labor Income	Value-Added (GSP)
	---------- 000s $ ----------		
	2027 (Projected)		
Direct (Capital Expenditures)	$5,546	$2,510	$3,241
Indirect	$1,122	$361	$682
Induced	$720	$217	$452
Total	$7,388	$3,088	$4,375

Total Economic Effects from Operations and Capital Expenditures

Total economic effects (direct, indirect, and induced) for operations in 2026 were estimated to be $63.7 million in McKenzie County and $19.3 million in Williams County. Economic effects in 2026 were entirely comprised of economic effects associated with operations; no capital expenditures were reported. Economic effects from operations supported $46.3 million and $5.2 million in labor income in McKenzie County and Williams County, respectively.

Total economic effects (direct, indirect and induced) for operations and capital expenditures for 2027 were projected to be $89.9 million in McKenzie County and $30.8 million in Williams County (Table 11). The projected increase in economic effects in McKenzie County are associated with projected expansion

in operations, while the projected in increase in economic effects in Williams County are largely a function of planned expenditures for capital improvements. Labor income from operations and capital expenditures in 2027 was projected to be $73.2 million in McKenzie County and $9.6million in Williams County. Total value-added to gross state product from operations and capital expenditures in 2027 was projected to be $51.5 million in McKenzie County and $22.4 million in Williams County.

Table 11. Total (Direct, Indirect and Induced) Economic Effects, by Key Economic Metrics, Operations and Capital Expenditures, McKenzie Health, McKenzie County and Williams County, 2026 and 2027 (projected)

	Type of Economic Metric		
Expenditure Type	Economic Output	Labor Income	Value-Added (GSP)
	----------000s $----------		
	McKenzie County 2026		
Operations Expenditures	$77,357	$51,382	$39,517
Capital Expenditures	--	--	--
Total Operations and Capital Expenditures	$77,357	$51,382	$39,517
	Williams County 2026		
Operations Expenditures	$19,342	$5,182	$16,312
Capital Expenditures	--	--	--
Total Operations and Capital Expenditures	$19,342	$5,182	$16,312
	McKenzie County 2027 (Projected)		
Operations Expenditures	$89,887	$73,244	$51,519
Capital Expenditures	$19	$5	$13
Total Operations and Capital Expenditures	$89,906	$73,249	$51,532
	Williams County 2027 (Projected)		
Operations Expenditures	$23,439	$6,558	$18,058
Capital Expenditures	$7,388	$3,088	$4,375
Total Operations and Capital Expenditures	$30,827	$9,646	$22,433

Government Revenues

A variety of tax revenues are generated by operations of McKenzie Health and from secondary business volume. Total government revenues (direct and secondary) for local and state jurisdictions in McKenzie County were estimated to be $709,700 in 2026. Slightly more than half (53 percent) of tax revenues are generated by indirect and induced effects from salaries and wages and sales taxes on taxable purchases of goods and services. Direct taxes in 2026 were $337,500 and taxes generated from indirect and induced effects were $372,200 (Table 12). Total direct tax collections for 2027 were projected to be $484,000 with taxes generated by indirect and induced effects estimated to be $426,000 for total projected tax collections of $910,400.

Table 12. State and Local Government Tax Revenues, Operations, McKenzie Health, McKenzie County, 2026 and 2027 (projected)			
Revenue Type	Taxes paid by McKenzie Health	Taxes Generated by Indirect and Induced Effects	Total Tax Collections[1]
	---------- 000s $ ----------		
	2026		
OPI: Corporate Profits Tax	$0.0	$24.1	$24.1
Personal Tax: Income	$113.2	$14.4	$127.6
Personal Tax: Motor Vehicle License	$24.6	$2.9	$27.5
Personal Tax: Other	$28.2	$3.7	$31.9
Social Insurance Tax: Employee Contributions	$78.1	$7.5	$85.6
Social Insurance Tax: Employer Contributions	$67.5	$6.5	$74.0
TOPI: Motor Vehicle License	$0.2	$3.8	$4.0
TOPI: Property Tax	$13.0	$172.9	$185.9
TOPI: Sales Tax	$12.0	$119.7	$131.7
TOPI: Other Taxes	$0.3	$8.0	$8.3
TOPI: Special Assessments	$0.4	$8.7	$9.1
Total Taxes	$337.5	$372.2	$709.7
	2027 (Projected)		
OPI: Corporate Profits Tax	$0.0	$31.2	$31.2
Personal Tax: Income	$166.6	$14.3	$180.9
Personal Tax: Motor Vehicle License	$36.2	$3.0	$39.2
Personal Tax: Other	$41.5	$3.6	$45.0
Social Insurance Tax: Employee Contributions	$115.0	$7.5	$122.4
Social Insurance Tax: Employer Contributions	$99.5	$6.5	$106.0
TOPI: Motor Vehicle License	$0.2	$4.34	$4.4
TOPI: Property Tax	$12.6	$199.0	$211.6
TOPI: Sales Tax	$12.1	$137.6	$149.8
TOPI: Other Taxes	$0.3	$9.1	$9.5
TOPI: Special Assessments	$0.4	$10.1	$10.4
Total Taxes	$484.0	$426.0	$910.4

[1]The sum of direct, Indirect, and Induced many differ slightly from the Total due to rounding error.

In Williams County, total government revenues (direct and secondary) for local and state jurisdictions were estimated to be $125,700 in 2026. Similar to McKenzie County, more than half (60 percent) of tax revenues in Williams County are generated by indirect and induced effects from salaries and wages and

sales taxes on taxable purchases of goods and services. Direct taxes in 2026 were $50,800 and taxes generated from indirect and induced effects were $74,900 (**Table 13**). Total direct tax collections in Williams County for 2027 were projected to be $64,100 with taxes generated by indirect and induced effects estimated to be $107,500 for total projected tax collections of $171,600.

Table 13. State and Local Government Tax Revenues, Operations, McKenzie Health, Williams County, 2026 and 2027 (projected)

Revenue Type	Taxes paid by McKenzie Health	Taxes Generated by Indirect and Induced Effects	Total Tax Collections[1]
	---------- 000s $ ----------		
	2026		
OPI: Corporate Profits Tax	$0.0	$6.0	$6.0
Personal Tax: Income	$15.1	$3.0	$18.1
Personal Tax: Motor Vehicle License	$3.1	$0.7	$3.8
Personal Tax: Other	$3.8	$0.9	$4.7
Social Insurance Tax: Employee Contributions	$7.1	$1.4	$8.5
Social Insurance Tax: Employer Contributions	$6.2	$1.3	$7.5
TOPI: Motor Vehicle License	$0.1	$0.6	$0.7
TOPI: Property Tax	$10.0	$15.6	$25.6
TOPI: Sales Tax	$5.0	$42.5	$47.5
TOPI: Other Taxes	$0.2	$1.5	$1.7
TOPI: Special Assessments	$0.2	$1.4	$1.6
Total Taxes	$50.8	$74.9	$125.7
	2027 (Projected)		
OPI: Corporate Profits Tax	$0.0	$8.2	$8.2
Personal Tax: Income	$18.3	$5.4	$23.7
Personal Tax: Motor Vehicle License	$3.8	$1.1	$4.9
Personal Tax: Other	$4.6	$1.4	$6.0
Social Insurance Tax: Employee Contributions	$8.7	$2.1	$10.8
Social Insurance Tax: Employer Contributions	$7.5	$1.8	$9.4
TOPI: Motor Vehicle License	$0.1	$0.8	$0.9
TOPI: Property Tax	$15.0	$22.2	$37.2
TOPI: Sales Tax	$5.5	$60.4	$65.9
TOPI: Other Taxes	$0.3	$2.1	$2.4
TOPI: Special Assessments	$0.3	$2.0	$2.3
Total Taxes	$64.1	$107.5	$171.6

[1]The sum of direct, Indirect, and Induced many differ slightly from the total due to rounding error.

Summary and Conclusions

McKenzie County has experienced unprecedented socio-economic and demographic changes over the course of the past decade. McKenzie County's population increased dramatically, becoming more racially diverse. McKenzie County also experienced an increased birth rate, twice that of statewide and national averages — and an increase in households with children. Strong economic conditions drove increases in per capita personal income. Rapid expansion of the oil and gas industry was the impetus for the unprecedented expansion in McKenzie County.

While expansion in the oil and gas industry brought unprecedented growth, more recently, socio-economic conditions have stabilized and moderated. While growth has moderated, the county continues to experience population growth, increased school enrollment, a birth rate higher than the statewide average, and strong economic conditions. Employment has increased annually since 2021 and median income is higher than the statewide median. Socio-economic indicators suggest the county continues to grow, albeit at a much more manageable and desirable pace. One area where McKenzie County lags statewide averages is in the percentage of uninsured residents. The rate of uninsured children is roughly twice that of the statewide average and the rate of uninsured residents under the age of 65 is similarly higher.

McKenzie Health responded to the unprecedented growth in the 2010's by building a new hospital and expanding services. In recent years, McKenzie Health has continued to expand services and increase the number of providers. Since 2022, the number of employees has increased from 307 to 537, including an additional 50 physicians, nurse practitioners, and physicians' assistants; 75 nurses; and 33 health technicians. In 2023, McKenzie Health expanded women and children's health services and the number of births has increased from 66 in 2023 to 111 in 2025 – and is projected to reach 200 in 2026. McKenzie Health has expanded services into Williston and Minot and made major improvements to both Horizon Assisted Living and the Good Shepard Home.

In addition to providing health care services, the McKenzie Health makes a substantial contribution to the local economy. McKenzie Health is responsible for 76 percent of all health care services output in McKenzie County and is the largest employer in McKenzie County. Total economic output (direct, indirect, and induced) from operations in McKenzie County in 2026 was $77.4 million and is projected to increase to $89.9 million in 2027. Total economic output (direct, indirect and induced) from operations in William County in 2026 was $19.3 million and is projected to increase to $30.8 million in 2027. Economic activities associated with McKenzie Health operations in McKenzie County generated $709,700 in state and local tax revenues in 2026 and is projected to generate $910,400 in state and local tax revenues in 2027. Economic activities associated with McKenzie Health operations in Williams County generated $126,700 in state and local tax revenues in 2026 and is projected to generate $171,600 in state and local tax revenues in 2027.

Changing socio-economic conditions in the past decade has resulted in the need for expanded health care services in McKenzie County. McKenzie Health has continued to grow and respond to those needs by expanding services and providers not only in McKenzie County but by offering services in Minot and Williston. In addition to responding to McKenzie County's need for health care services, McKenzie Health is also making a substantial contribution to the local economy.

References

Centers for Disease Control and Prevention. (2026). *Births: Provisional Data for 2025*. Retrieved from https://www.cdc.gov/nchs/data/vsrr/vsrr043.pdf

IMPLAN Group LLC. (2025). Retrieved from IMPLAN System Software and Data at www.IMPLAN.com

McKenzie Health. (2026) Unpublished employment data. McKenzie Health, Watford City, North Dakota

National Institutes of Health. (2024). *Births and birth rates: United States, 2010-2024, and by race and Hispanc origin of mother: United States, 2016-2024.* Retrived from https://www.ncbi.nlm.nih.gov/books/NBK623381/table/nvsr75-02.t6/

North Dakota Department of Health and Human Services. (2026). *Total Births (1-Year Totals) in McKenzie*. Retrieved from Annie E. Casey Foundation KIDS COUNT Data Center at https://datacenter.aecf.org/data/tables/2362-total-births-1-year-totals#detailed/5/5151/false/575,1096,2545,1095,2048,574,1729,37,871,870/any/4928

North Dakota Job Service (2026). North Dakota Largest Employers by County. Retrieved from https://www.ndlmi.com/vosnet/gsipub/documentView.aspx?docid=682

North Dakota Department of Public Instruction. (2026a). *Fall Enrollment*. Retrieved from https://www.nd.gov/dpi/data

North Dakota Department of Public Instruction. (2026b). *Four Year High School Cohort Graduation Rate in North Dakota*. Retrieved from Annie E. Casey Foundation KIDS COUNT Data Center at https://datacenter.aecf.org/data/tables/9009-four-year-high-school-cohort-graduation-rate#detailed/2/any/false/2673,2575,2523,2103,2029,1965,1750,1686,1654,1601/any/17974

U.S. Bureau of Economic Analysis. (2026). CAINC35: *Personal Current Transfer Receipts, Discontinued*. Last updated November 16,2023. Retrieved from https://www.bea.gov/data/discontinued-or-delayed-statistics

U.S. Bureau of Labor Statistics. (2026). *Quarterly Census of Employment and Wages.* Retrieved from https://www.bls.gov/cew/downloadable-data-files.htm

U.S. Census Bureau. (2010). *2010 Decennial Census.* Retrieved from https://data.census.gov/table?q=race+2010&g=050XX00US38053

U.S. Census Bureau. (2020). *2020 Decennial Census.* Retrieved from https://data.census.gov/table/DECENNIALDHC2020.P9?q=race&g=050XX00US38053

U.S. Census Bureau. (2024). *County Intercensal Population Totals: 2010-2020*. Retrieved from https://www.census.gov/data/datasets/time-series/demo/popest/intercensal-2010-2020-counties.html

U.S. Census Bureau. (2026a). *Population Estimates Program, Vintage 2025: annual county population estimates for North Dakota, 2020–2025*. Retrieved from https://www2.census.gov/programs-surveys/popest/tables/2020-2025/counties/totals/co-est2025-pop-38.xlsx

U.S. Census Bureau. (2026b). *Population Estimates Program, Vintage 2025: annual state population estimates, 2020–2025*. Retrieved from https://www2.census.gov/programs-surveys/popest/tables/2020-2025/state/totals/NST-EST2025-POP.xlsx

U.S. Census Bureau. (2026c). *Population Estimates Program, Vintage 2025: annual county population estimates by selected age groups and sex for North Dakota, 2020–2025*. Retrieved from https://www2.census.gov/programs-surveys/popest/datasets/2020-2025/counties/asrh/cc-est2025-agesex-38.csv

U.S. Census Bureau. (2026d). *Population Estimates Program, Vintage 2025: annual county population estimates by age, sex, race, and Hispanic origin for North Dakota, 2020–2025*. Retrieved from https://www2.census.gov/programs-surveys/popest/datasets/2020-2025/counties/asrh/cc-est2025-alldata-38.csv

U.S. Census Bureau. (2026e). *American Community Survey 5-Year Data (2009-2024): S2501*. Retrieved from https://data.census.gov/table/ACSST5Y2024.S2501?q=household+size&g=010XX00US_040XX00US38

U.S. Census Bureau. (2026f). *Small Area Income and Poverty Estimates (SAIPE) Program. Retrieved from* https://www.census.gov/programs-surveys/saipe.html

U.S. Census Bueau. (2026g). *American Community Survey 1-Year Data: S2701*. Retrieved from https://data.census.gov/table?q=uninsured&g=010XX00US_040XX00US38

Appendix A Survey Instrument

NDSU AGRIBUSINESS AND APPLIED ECONOMICS

Economic Contribution of McKenzie County Healthcare Systems, Inc.

Data Request

McKenzie County Operations

May 5, 2026

Funding for this study is provided by McKenzie County Healthcare Systems, Inc.

Confidentiality

The data and information provided will be held in confidence. Only the NDSU research team has access to this information, and the information is never shared with any interests during or after the study. A confidentiality agreement can be provided upon request.

Guidelines and Instructions

Please use the following guidelines.

1. Please provide requested information for FY 2026 and projected for FY 2027 for McKenzie County Health operation in ***McKenzie County.***

   a. For FY2026, please use estimates for the remainder of FY2026.
   b. For FY2027, please estimate projected revenues and expenditures.

2. If information is not readily available, please provide an estimate

3. Responses can be rounded to the nearest thousand dollars.

4. Please complete the survey by May 22, 2026 and return to Nancy Hodur at the address below.

Study Contacts

Dr. Nancy Hodur (701-231-8621)
Director, Center for Social Research
North Dakota State University
nancy.hodur@ndsu.edu
701-361-3628

Dean Bangsund, Research Scientist
Ag. Business & Applied Economic
North Dakota State University
d.bangsund@ndsu.edu
701-231-7471

Contribution of McKenzie County Healthcare Systems, Inc

Data Request

McKenzie County Operations

Contact Person: _____

Email: _____ Phone: _____

Gross Revenues in North Dakota, McKenzie County (please round to thousands)

Gross revenues include revenues from all sources, such as inpatient services, outpatient services, assisted living services, ancillary services, satellite clinics, grants, donations, foundation and other revenues sources.

Fiscal Year	Revenue from All Sources
FY2026 (estimate remainder of FY2026)	$
FY2027 (anticipated)	$

Employment

Employment is measured the place of work, so please include all individuals that work in McKenzie County for your organization regardless of their home residence.

Employment (All individuals working in McKenzie County regardless of their home residence)	In McKenzie County
FY 2026	
Number of full-time employees	
Number of part-time employees	
FY 2027 (anticipated)	
Number of full-time employees	
Number of part-time employees	

Expenditures for FY 2026, McKenzie County

Please estimate total expenditures for each category and the percentage of those expenditures made to entities in McKenzie County.

Values can represent your best estimate and can be rounded to thousands of dollars.

Annual expenses only. Do not include capital expenses. If a major expenditure category is missing, please specify the expenditure name, amount and percent under "Other".

Categories	Total Expense in FY 2026	Percentage to Entities in McKenzie County
Example: repairs	$21,000	70%
Employment Compensation		
Wages, salaries, bonuses	$	%
Employee Benefits (insurance, retirement, FICA, unemployment and WSI fees)	$	%
Operating Expenditures		
General Office (e.g., computers, software, office furniture, printer cartridges, paper, pens, custodial supplies)	$	%
Communications (e.g., internet, satellite, cell phone, land line)	$	%
Equipment Leases (e.g., vehicles)	$	%
Insurance (e.g., property and liability insurance for buildings, facilities, vehicles)	$	%
Loan Interest and Banking/Brokerage Fees	$	%
Business Services (e.g., advertising and promotion, computer services, security services, tax and auditing preparation, automotive repairs, janitorial services, landscaping and grounds keeping, catering and event hosting)	$	%
Business Travel (e.g., lodging, meals, entertainment, mileage, conferences, airfare)	$	%
Utilities (e.g., natural gas, electricity, water and sewer)	$	%
Garbage and Medical Waste Disposal	$	%

Medical Supplies (e.g., gloves, needles, masks, anesthesia, oxygen, bed linens, etc.)	$	%
Food and Meal Serving	$	%
Pharmaceuticals	$	%
Others (please specify)		
	$	%
	$	%
	$	%
Facility Maintenance and Upkeep (Annual Expenses Only)	**Total Expense in FY 2026**	**Percentage to Entities in McKenzie County**
Manufacturing related to annual upkeep (e.g., on-site or contracted fabrication)	$	%
Contract Construction related to annual upkeep	$	%
Engineering and Technical Services (annual)	$	%
Contracted Repairs (annual)	$	%
Others (please specify)		
	$	%
	$	%
Miscellaneous Expenses		
Memberships and Dues	$	%
Employee Training	$	%
Charitable Contributions	$	%
Others (please specify)		
	$	%
	$	%

Estimated Expenditures for FY2027, McKenzie County

Please make your best estimate for the coming fiscal year.

Categories	Estimated Expense in FY 2027	Percentage to Entities in McKenzie County
Example: repairs	$21,000	70%
Employment Compensation		
Wages, salaries, bonuses	$	%
Employee Benefits (insurance, retirement, FICA, unemployment and WSI fees)	$	%
Operating Expenditures		
General Office (e.g., computers, software, office furniture, printer cartridges, paper, janitorial supplies)	$	%
Communications (e.g., internet, satellite, cell phone, land line)	$	%
Equipment Leases (e.g., vehicles)	$	%
Insurance (e.g., property and liability insurance for buildings, facilities, vehicles)	$	%
Loan Interest and Banking/Brokerage Fees	$	%
Business Services (e.g., advertising and promotion, computer services, security services, tax and auditing preparation, automotive repairs, janitorial services (contracted), landscaping and grounds keeping, catering and event hosting)	$	%
Business Travel (e.g., lodging, meals, entertainment, mileage, conferences, airfare)	$	%
Utilities (e.g., natural gas, electricity, water and sewer)	$	%
Garbage and Medical Waste Disposal	$	%
Medical Supplies (e.g., gloves, needles, masks, anesthesia, oxygen, bed linens, etc.)	$	%

Food and Meal Serving	$	%
Pharmaceuticals	$	%
Others (please specify)		
	$	%
	$	%
Facility Maintenance and Upkeep (anticipated)	**Estimated Expense in FY 2027**	**Percentage to Entities in McKenzie County**
Manufacturing related to annual upkeep (e.g., on-site or contracted fabrication)	$	%
Contract Construction related to annual upkeep	$	%
Engineering and Technical Services	$	%
Contracted Repairs	$	%
Others (please specify)		
	$	%
	$	%
	$	%
Miscellaneous Expenses		
Memberships and Dues	$	%
Employee Training	$	%
Charitable Contributions	$	%
Others (please specify)		
	$	%
	$	%

Capital Expenditures, McKenzie County

Please estimate capital expenditures for facility construction/building, furnishings, medical equipment, other equipment, etc. Do not include any expenditures for parcel, lot, or land purchases.

Capital expenditure projects often occur over multiple years. Please estimate only those capital expenditures that occurred in FY2026 and projected for FY2027. Your best estimate is sufficient.

Capital Expenditures (infrequent expenditures that do not represent an annual expense)	Total Capital Outlays	Percentage to Entities in McKenzie County
	FY 2026	
Facility expansion and building new facilities (These expenditures most closely align with construction, labor and material costs. Do not include land purchases or medical equipment.)	$	%
Medical equipment (e.g., lab instruments, imaging and scanning, surgical equipment, other patient testing and monitoring systems)	$	%
Others (please specify)		%
	$	
	$	
	FY 2027 (estimated)	
Facility expansion and building new facilities (Note: These expenditures most closely align with construction labor and material costs. Do not include land purchases or medical equipment)	$	%
Medical equipment (e.g., lab instruments, imaging and scanning, surgical equipment, other patient testing and monitoring systems)	$	%
Others (please specify)		
	$	%
	$	%

Taxes Paid in FY 2026 to North Dakota Jurisdictions *Do not include payroll taxes.*		Total Taxes Paid	Percentage in North Dakota
	Property Tax	$	100%
	Sales and Use	$	100%
	Corporate Income	$	100%
	Others (please specify)		100%
		$	%
		$	%
		$	%
Estimated Taxes for FY 2027 **Do not include payroll taxes.**		**Estimated Taxes**	**Percentage in North Dakota**
	Property Tax	$	100%
	Sales and Use	$	100%
	Corporate Income	$	100%
	Others (please specify)		
		$	%
		$	%
		$	%

Feel free to add any supporting materials or comments that will help with the study.

NDSU AGRIBUSINESS AND APPLIED ECONOMICS

Economic Contribution of McKenzie County Healthcare Systems, Inc.

Data Request

Williams County Operations

May 5, 2026

Funding for this study is provided by McKenzie County Healthcare Systems, Inc.

Department of Agribusiness & Applied Economics, North Dakota State University

Confidentiality

The data and information provided will be held in confidence. Only the NDSU research team has access to this information, and the information is never shared with any interests during or after the study. A confidentiality agreement can be provided upon request.

Guidelines and Instructions

Please use the following guidelines.

1. Please provide requested information for FY 2026 and projected for FY 2027 for McKenzie County Health operation in ***Williams County.***

   a. For FY2026, please use estimates for the remainder of FY2026.
   b. For FY2027, please estimate projected revenues and expenditures.

2. If information is not readily available, please provide an estimate

3. Responses can be rounded to the nearest thousand dollars.

4. Please complete the survey by May 22, 2026 and return to Nancy Hodur at the address below.

Study Contacts

Dr. Nancy Hodur (701-231-8621)

Director, Center for Social Research Econ.

North Dakota State University

nancy.hodur@ndsu.edu

701-361-3628

Dean Bangsund

Research Scientist, Ag. Bus. & Applied Econ.

North Dakota State University

d.bangsund@ndsu.edu

701-231-7471

Contribution of McKenzie County Healthcare Systems, Inc

Data Request

Williams County Operations

Contact Person: _____

Email: _____ Phone: _____

Gross Revenues in North Dakota, Williams County (please round to thousands)

Gross revenues include revenues from all sources, such as inpatient services, outpatient services, assisted living services, ancillary services, satellite clinics, grants, donations, foundation and other revenues sources.

Fiscal Year	Revenue from All Sources
FY2026 (estimate remainder of FY2026)	$
FY2027 (anticipated)	$

Employment

Employment is measured the place of work, so please include all individuals that work in Williams County for your organization regardless of their home residence.

Employment (All individuals working in Williams County regardless of their home residence)	In Williams County
FY 2026	
Number of full-time employees	
Number of part-time employees	
FY 2027 (anticipated)	
Number of full-time employees	
Number of part-time employees	

Expenditures for FY 2026, Williams County

Please estimate total expenditures for each category and the percentage of those expenditures made to entities in Williams County.

Values can represent your best estimate and can be rounded to thousands of dollars.

Annual expenses only. Do not include capital expenses. If a major expenditure category is missing, please specify the expenditure name, amount and percent under "Other".

Categories	Total Expense in FY 2026	Percentage to Entities in Williams County
Example: repairs	$21,000	70%
Employment Compensation		
Wages, salaries, bonuses	$	%
Employee Benefits (insurance, retirement, FICA, unemployment and WSI fees)	$	%
Operating Expenditures		
General Office (e.g., computers, software, office furniture, printer cartridges, paper, pens, custodial supplies)	$	%
Communications (e.g., internet, satellite, cell phone, land line)	$	%
Equipment Leases (e.g., vehicles)	$	%
Insurance (e.g., property and liability insurance for buildings, facilities, vehicles)	$	%
Loan Interest and Banking/Brokerage Fees	$	%
Business Services (e.g., advertising and promotion, computer services, security services, tax and auditing preparation, automotive repairs, janitorial services, landscaping and grounds keeping, catering and event hosting)	$	%
Business Travel (e.g., lodging, meals, entertainment, mileage, conferences, airfare)	$	%
Utilities (e.g., natural gas, electricity, water and sewer)	$	%

Garbage and Medical Waste Disposal	$	%
Medical Supplies (e.g., gloves, needles, masks, anesthesia, oxygen, bed linens, etc.)	$	%
Food and Meal Serving	$	%
Pharmaceuticals	$	%
Others (please specify)		
	$	%
Facility Maintenance and Upkeep (Annual Expenses Only)	**Total Expense in FY 2026**	**Percentage to Entities in Williams County**
Manufacturing related to annual upkeep (e.g., on-site or contracted fabrication)	$	%
Contract Construction related to annual upkeep	$	%
Engineering and Technical Services (annual)	$	%
Contracted Repairs (annual)	$	%
Others (please specify)		
	$	%
	$	%
Miscellaneous Expenses		
Memberships and Dues	$	%
Employee Training	$	%
Charitable Contributions	$	%
Others (please specify)		
	$	%
	$	%

Estimated Expenditures for FY2027, Williams County

Please make your best estimate for the coming fiscal year.

Categories	Estimated Expense in FY 2027	Percentage to Entities in Williams County
Example: repairs	$21,000	70%
Employment Compensation		
Wages, salaries, bonuses	$	%
Employee Benefits (insurance, retirement, FICA, unemployment and WSI fees)	$	%
Operating Expenditures		
General Office (e.g., computers, software, office furniture, printer cartridges, paper, janitorial supplies)	$	%
Communications (e.g., internet, satellite, cell phone, land line)	$	%
Equipment Leases (e.g., vehicles)	$	%
Insurance (e.g., property and liability insurance for buildings, facilities, vehicles)	$	%
Loan Interest and Banking/Brokerage Fees	$	%
Business Services (e.g., advertising and promotion, computer services, security services, tax and auditing preparation, automotive repairs, janitorial services (contracted), landscaping and grounds keeping, catering and event hosting)	$	%
Business Travel (e.g., lodging, meals, entertainment, mileage, conferences, airfare)	$	%
Utilities (e.g., natural gas, electricity, water and sewer)	$	%
Garbage and Medical Waste Disposal	$	%
Medical Supplies (e.g., gloves, needles, masks, anesthesia, oxygen, bed linens, etc.)	$	%

Food and Meal Serving	$	%
Pharmaceuticals	$	%
Others (please specify)		
	$	%
	$	%
Facility Maintenance and Upkeep (anticipated)	**Estimated Expense in FY 2027**	**Percentage to Entities in Williams County**
Manufacturing related to annual upkeep (e.g., on-site or contracted fabrication)	$	%
Contract Construction related to annual upkeep	$	%
Engineering and Technical Services	$	%
Contracted Repairs	$	%
Others (please specify)		
	$	%
	$	%
Miscellaneous Expenses		
Memberships and Dues	$	%
Employee Training	$	%
Charitable Contributions	$	%
Others (please specify)		
	$	%
	$	%
	$	%

Capital Expenditures, Williams County

Please estimate capital expenditures for facility construction/building, furnishings, medical equipment, other equipment, etc. Do not include any expenditures for parcel, lot, or land purchases.

Capital expenditure projects often occur over multiple years. Please estimate only those capital expenditures that occurred in FY2026 and projected for FY2027. Your best estimate is sufficient.

Capital Expenditures (infrequent expenditures that do not represent an annual expense)	Total Capital Outlays	Percentage to Entities in Williams County
	FY 2026	
Facility expansion and building new facilities (These expenditures most closely align with construction, labor and material costs. Do not include land purchases or medical equipment.)	$	%
Medical equipment (e.g., lab instruments, imaging and scanning, surgical equipment, other patient testing and monitoring systems)	$	%
Others (please specify)		%
	$	
	$	
	FY 2027 (estimated)	
Facility expansion and building new facilities (Note: These expenditures most closely align with construction labor and material costs. Do not include land purchases or medical equipment)	$	%
Medical equipment (e.g., lab instruments, imaging and scanning, surgical equipment, other patient testing and monitoring systems)	$	%
Others (please specify)		
	$	%
	$	%
	$	%

Taxes Paid in FY 2026 to North Dakota Jurisdictions *Do not include payroll taxes.*		Total Taxes Paid	Percentage in North Dakota
	Property Tax	$	100%
	Sales and Use	$	100%
	Corporate Income	$	100%
	Others (please specify)		100%
		$	%
		$	%
		$	%
Estimated Taxes for FY 2027 **Do not include payroll taxes.**		**Estimated Taxes**	**Percentage in North Dakota**
	Property Tax	$	100%
	Sales and Use	$	100%
	Corporate Income	$	100%
	Others (please specify)		
		$	%
		$	%
		$	%

Feel free to add any supporting materials or comments that will help with the study.