

**MARKET ANALYSIS OF DEMAND
FOR SENIOR HOUSING AND RELATED SERVICES
IN THE HAWLEY, MINNESOTA HAWLEY MARKET AREA
MARCH 2013**

Purpose of the Study

The City of Hawley contracted with Health Planning & Management Resources, Inc. (HP&MR), Edina, Minnesota, to complete a market analysis of demand for senior housing and related services for the Hawley, Minnesota Market Area.

Study Process

The information presented in this market analysis was compiled through the following processes:

- Defining a Market Area based on discussions with the City Treasurer, and the Eventide President and considering the proximity of other communities with senior housing options available
- Gathering and analyzing socio-demographic data for the defined Hawley Market Area and Clay County
- Profiling general assisted living, memory loss assisted living, and independent congregate housing near the Hawley Market Area
- Projecting the demand for general and memory loss assisted living and independent congregate housing for the Hawley Market Area
- Developing recommendations related to potential development

Definition of Senior Housing Types for Projecting Housing Demand

For the purposes of this study, two types of senior housing were considered in the analysis and defined as follows.

Independent congregate housing was identified for this study as apartment or town home style living for persons 65 years of age and older. Independent congregate housing facilities typically have a minimum age requirement of 55; however, demand projections reflect those individuals 65 years of age and older. An individual will rent or purchase a living unit, which may be either a one or two-bedroom apartment, with a full kitchen. In apartment-style congregate housing, the building is designed to accommodate a daily meal service, if desired, as well as social-recreational spaces. The building and apartments are designed to be accessible and accommodating to seniors aging in place. The buildings have secured entrances, and there is an emergency call system available for individuals within their apartments. Services, e.g., meals, housekeeping, personal care, etc., are generally optional services purchased if the occupant desires or needs them. Most older persons who move to these types of buildings do so because of convenience and concern about being able to maintain their single-family homes. Persons are also beginning to experience some health problems. In the demand analysis, independent congregate housing demand relates to the building that is designed to be accessible and accommodating to seniors as they age in place.

For the purposes of this study, assisted living is defined as follows. The reader should note that “assisted living” is not a precise term that clearly defines levels of care for persons who are in assisted living.

Assisted living is for very frail elderly persons with three or more limitations in activities of daily living. Persons who need assisted living are persons who need help in the daily management of their lives, as well as someone available 24 hours a day for oversight and assistance. Persons living in assisted living are more likely to have “unscheduled” needs that arise compared to more independent housing in which persons schedule their assistance. Gerontology research has substantiated that persons who have three or more limitations in activities of daily living are at a degree of frailty that it is difficult for them to maintain themselves in the independent setting.

If assisted living meets the above definition, e.g., 24-hour staffing, it has emerged as an alternative to the nursing home for many older persons. In the past, persons who needed this level of service had no option other than the nursing home. Persons coming to assisted living generally have at least two meals per day provided and frequently, all three meals, have planned social and recreational activities, housekeeping of their living units, and some assistance with laundry and have assistance with personal care. Living units in such buildings vary in size and have included one-room, two-room suites and apartments. Some include small cooking facilities, e.g., microwave, sink and small refrigerators. In most newly designed projects, and projects for the private pay market, there are generally private bathroom accommodations for each unit.

Older persons who have moderate to severe Alzheimer's disease are increasingly being taken care of in the assisted living setting, particularly those who can afford to pay privately for this type of care. The assisted living setting provides ideal circumstances for persons with Alzheimer's disease if it has specialty programming for this population. Many persons with Alzheimer's disease do not have health and/or medical needs that necessitate living in a nursing facility with 24-hour availability of this type of care. However, these persons need to be in a sheltered and structured situation. Many general assisted living facilities have older persons who are in the earliest stages of the disease and do not present the risk of leaving the facility unattended and are not a problem for other residents, e.g., going into their rooms, etc. However, when persons progress to the moderate stage, they are difficult to manage in a general assisted living setting.

The reader should note the above definitions are based on general market definitions. These definitions are reflected in the demand section of the report. The reader should also note these definitions are used in determining whether facilities are classified as independent and congregate housing or assisted living. This sometimes differs from how the building administrator describes his/her facility and/or has it licensed.

In Minnesota, Housing with Services is a registration for senior housing that provides some services to the persons living in the building. In addition, if a provider is providing home care services only to the residents of the building that he/she operates, a Class F home care license can be obtained, which is much less onerous than a licensed home health care agency that serves the general public. In Minnesota, payment is available for qualifying persons through Group Residential

Housing for room and board and through the Elderly Waiver Program (Customized Living) for services that persons need.

Definition of the Hawley Market Area

The Hawley Market Area was defined as the following zip codes:

56514 – Barnesville
56547 – Glyndon
56549 – Hawley
56552 – Hitterdal
56554 – Lake Park
56585 – Ulen

The researcher assumed that 70 percent of the units would be occupied by persons in the Hawley Market Area and the other 30 percent would be from places near the market and/or persons moving family members who need assistance to live closer to them.

Facilities in and near the Hawley Market Area were profiled to assist in determining what expectations may be in the area for senior housing, including prices. The map on page 16 identifies these areas.

Socio-Demographic Analysis of the Hawley Market Area and Clay County

The following analysis presents selected socio-demographic information for the Hawley Market Area and Clay County. Clay County was used to compare with the dynamics of the Hawley Market Area. The information presents estimates for 2013 and projections for 2018. The population data available from the 2010 U.S. Census is incorporated into the estimates and projections. The source of this information is Claritas, Inc., Arlington, Virginia. Claritas, Inc. maintains an on-line database that provides detailed socio-demographic data about the defined Hawley Market Area, including current year population estimates and five-year population projections.

Long-term demographic information for Clay County through the year 2035 is also presented. The source of this information is Minnesota State Demographic Center. Minnesota State Demographic Center information is available on a statewide and countywide basis.

Information taken from Claritas, Inc. and Minnesota State Demographic Center will differ somewhat. In the researcher's experience, Claritas, Inc. is a more sensitive database because it is updated annually. Also, because of methods used for estimating and projecting population, Claritas, Inc. is more likely to identify growth trends or decreases in population than the State database. For example, in 2013, Claritas, Inc. estimates the total senior population 65 years of age and older in Clay County to be 7,484 persons, while the Minnesota State Demographic Center estimates 6,940 in 2010, which is a difference of 544 persons.

General Population Trends and Senior Population Characteristics

Included in this analysis are charts reflecting trends and characteristics of the total population and the senior population 65 years of age and older in the Hawley Market Area and Clay County.

The data on pages 17 through 20, for the Hawley Market Area and Clay County, show projections for both the total population and the senior population.

- From 2013 to 2018, the total population in the Hawley Market Area is projected to increase by 502 persons from 15,022 in 2013 to 15,524 in 2018.
- From 2013 to 2018, the total population in Clay County is projected to increase by 2,672 persons from 60,736 in 2013 to 63,408 in 2018.
- Long-term projections for the total population in Clay County show an increase in population from the years 2010 to 2035 from 57,070 persons in 2010 to 68,130 persons in 2035.
- From 2013 to 2018, the total senior population in the Hawley Market Area is projected to increase by 302 persons from 2,306 in 2013 to 2,608 in 2018.

- From 2013 to 2018, the total senior population in Clay County is projected to increase by 983 persons from 7,484 in 2013 to 8,467 in 2018.
- Long-term projections for the total senior population in Clay County show an increase in population from the years 2010 to 2035 from 6,940 persons in 2010 to 12,960 persons in 2035.

The data on pages 21 and 22 show projections for the senior population as a percent of the total population for the Hawley Market Area and Clay County. The reader should note the following:

- From 2013 to 2018, the senior population as a percent of the total population in the Hawley Market Area is projected to increase by 1.4 percent from 15.4 percent in 2013 to 16.8 percent in 2018.
- From 2013 to 2018, the senior population as a percent of the total population in Clay County is projected to increase by 1.1 percent from 12.3 percent in 2013 to 13.4 percent in 2018.
- Long-term projections for the senior population as a percent of the total population in Clay County projects an increase in percent from the years 2010 (12.2 percent) to 2035 (19.0 percent).

Population Change by Age Segments of the Senior Population

An important consideration in an analysis of the senior population is the age segmentation. Age segmentation is used to determine the use of nursing facilities, assisted living, independent and congregate senior housing and other senior services, which are dependent on the age of the persons in the senior household.

Seniors age 65 to 74 are lower users of nursing facilities, senior housing and related services, than seniors in the older age categories. Seniors in this lower age category are able to maintain their own homes or condominiums, and/or spend their early retirement years in Sunbelt states, at least during the winter months. Some persons in this age category will move to senior housing as a convenience, e.g., no

maintenance, able to leave for the winter, and this is accounted for in the demand projections.

Seniors age 75 and older are much more likely to be at a stage in their lives when they begin to consider housing options, including both independent and congregate housing and assisted living, and have a higher probability of needing to spend some time in a nursing facility. This is precipitated by the inability to maintain a single-family home because of increasing health problems, one or both persons in the household becoming debilitated, the loss of the spouse, and/or the inability of the remaining spouse (most frequently the female) to be alone and care for a home.

Seniors age 80 and older have a higher probability of needing nursing home care or assisted living services. At this point in their lives, some seniors feel more comfortable and confident in their local community facilities with which they are familiar. When seniors begin to experience frailty, some seniors who have moved to Sunbelt communities decide to move back to their home communities, wanting to be near family and/or having greater trust in the community nursing homes in the communities they lived in for years.

Population change by age segments for the Hawley Market Area and Clay County are located on pages 23 and 24. The reader should note the following information:

- In the Hawley Market Area, the population for persons in the age groups of 55 years of age and older are projected to increase between the years 2013 and 2018. The largest increase in population is in the 65 to 74 years of age group, which increases by 20.7 percent. The smallest increase in population is in the 75 to 84 age group, which increases by 3.8 percent.
- In Clay County, the population for persons in all the age groups 55 years of age and older is projected to increase between the years 2013 and 2018. The largest increase in population is in the 65 to 74 age group, which increases by 24.8 percent. The smallest increase in population is in the 75 to 84 age group, which increases by 0.3 percent.
- Long-term population projections in Clay County project the population for persons in all age groups 60 years of age and older to increase between the years 2010 and 2035. The largest projected increase in population is

in the 75 to 79 age group, which increases by 136.7 percent. The smallest projected increase in population is in the 60 to 64 age group, which increases by 10.3 percent. The population is projected to decrease in the age group of 55 to 59 years of age.

Income of Senior Households

The income of the senior households in the Hawley Market Area was used to segment the demand, presented later in this report, into those who are able to pay privately and those that will need assistance to live in senior housing alternatives. The charts on pages 25 and 26, show the estimated income distribution of senior households in the Hawley Market Area and Clay County by head of household ages 65 to 74, 75 to 84 and 85 years of age and older for both 2013 and 2018.

Senior households with incomes of less than \$30,000 (2013) and \$35,000 (2018) generally need some type of assistance in order to access senior housing alternatives. Thus, the demand projections, for independent and congregate housing and assisted living, take into account the number of households who can pay privately, e.g., incomes of \$30,000 or greater, and those persons that will need help, e.g., incomes of less than \$30,000.

The reader should note the following:

- Households with incomes of less than \$30,000 are most often widowed females, who rely on a low social security payment and have few assets.
- Senior income data does not reflect assets seniors may have that they can use for health care and related services. The single largest asset most seniors have is the single-family home, which is typically paid for.
- In 2013, the percentage of households living in the Hawley Market Area with head of household 65 to 74 years of age and having incomes of \$30,000 or greater, e.g. able to pay privately, is 64.0 percent. The percentage of households with head of household 75 to 84 years of age is 45.8 percent and for 85 years of age and older is 33.6 percent. For Clay County, the percentages are 64.6, 48.5 and 34.9, respectively.

- In 2018, the percentage of households living in the Hawley Market Area with head of household 65 to 74 years of age and having incomes of \$35,000 or greater, e.g. able to pay privately, is 60.5 percent. The percentage of households with head of household 75 to 84 years of age is 41.4 percent and for 85 years of age and older is 26.6 percent. For Clay County, the percentages are 59.7, 43.5 and 28.9, respectively.

Profiles of General and Memory Loss Assisted Living and Independent Congregate Housing in and near the Hawley Market Area

This analysis presents profiles of general and memory loss assisted living and independent and congregate housing facilities in and near the Hawley Market Area.

The inventories for the Fargo Moorhead market are included in a separate Appendix for reference per Eventide Senior Living Communities. In the planning process, Hawley will need to develop a senior development that more closely reflects the quality of facilities in the Fargo Moorhead area.

There is a brief description of the facilities, the total number of units and the average occupancy of the facilities in and near the Hawley Market Area. The detailed data relies on information received in telephone calls to the facilities; thus, the researcher is conveying this information with the expectation that it is accurate.

The reader should note that in assisted living, 24 hour staffing, emergency response system, utilities and activities are assumed and are available in all of the assisted living facilities. Only those items that were variable were identified as included in the rent.

Assisted Living Facilities

Detailed profiles of the general and memory loss assisted living facilities in and near the Hawley Market Area are available on pages 27 through 29.

General Assisted Living

There are three general assisted living facilities located in the Hawley Market Area. These three facilities have a total of 62 beds and were 85.5 percent occupied at the time of contact.

There are five general assisted living facilities located near the Hawley Market Area. These five facilities have a total of 86 units and 79.1 percent were occupied at the time of contact.

Memory Loss Assisted Living

There are no facilities that have special units for persons with memory loss needs located in the Hawley Market Area.

There are no facilities that have special units for persons with memory loss needs located near the Hawley Market Area.

Independent Congregate Housing

Detailed profiles of the market rate independent congregate housing near the Hawley Market Area are available on page 30.

There are two market rate independent congregate housing facilities located in the Hawley Market Area. These two facilities have a total of 17 units and were 88.2 percent occupied at the time of contact. One facility has services available at the site and the other has no services available.

Demand Analysis for General and Memory Loss Assisted Living and Independent Congregate Housing in and near the Hawley Market Area

This section of the analysis presents the demand for general and memory loss assisted living and independent congregate housing in the Hawley Market Area.

Using the defined Hawley Market Area based on discussions with The City of Hawley and analysis of the Hawley Market Area and the proximity of other communities with senior housing available, it has been determined that persons from the Hawley Market Area would fill approximately 70 percent of beds available in the Hawley Market Area. The balance is likely to be persons who move to be near adult children, return to the area from another location, or live near, but not in, the Hawley Market Area.

General Assisted Living Demand

The table on page 31 presents the general assisted living demand projections for the Hawley Market Area, which is segmented by income.

- In 2013, using the analysis that adjusts for homeownership, the estimated demand for market rate general assisted living units is 22 units and the demand for subsidized general assisted living units is 20 units.
- In 2018, using the analysis that adjusts for homeownership, the estimated demand for market rate general assisted living units is 22 units and the demand for subsidized general assisted living units is 22 units.

Demand for Alzheimer's and Other Forms of Dementia

The table on page 32 presents the anticipated number of persons with moderate to severe Alzheimer's disease in the Hawley Market Area in 2013 and 2018. The reader should note the following:

- The chart on page 33, assumes that assisted living will fill 60.0 percent of the market rate demand and 40.0 percent of the subsidized demand.
- In 2013, the demand for market rate memory loss assisted living is 10 and the demand for subsidized memory loss assisted living is 16.
- In 2018, the demand for market rate memory loss assisted living is 10 and the demand for subsidized memory loss assisted living is 18.

The reader should note the demand for Alzheimer's and related dementia is a partial, but not total, overlap with general assisted living. Many persons in general assisted living are at earlier stages of Alzheimer's disease but are not yet a problem for managing or do not cause problems for other residents. In addition, the demand for assisted living assumed persons will have three or more limitations in activities of daily living, and some persons with Alzheimer's disease who need to be taken care of outside of their homes do not have the defined limitations but need to be in a 24-hour supervised living environment.

Independent Congregate Housing Demand

The table on page 34 presents the market rate independent congregate housing demand projections for the Hawley Market Area, which is segmented by income.

- In 2013, using the analysis that adjusts for homeownership, the estimated demand for market rate independent congregate housing units is 72 units.
- In 2018, using the analysis that adjusts for homeownership, the estimated demand for market rate independent and congregate housing units is 70 units.

Summary of Supply and Demand for General and Memory Loss Assisted Living and Independent and Congregate Housing in and near the Hawley Market Area

The tables on pages 35 and 36 summarize the demand and supply for general and memory loss assisted living and independent and congregate housing in and near the Hawley Market Area. These tables account for the anticipated number of persons coming from outside of the Hawley Market Area.

General Assisted Living

In 2013, there is an oversupply of 20 units of market rate general assisted living and an unmet demand of 18 units of subsidized general assisted living. In 2018, these numbers change to an oversupply of 20 units of market rate general assisted living and an unmet demand of 21 units of subsidized general assisted living.

The reader should note that segmenting the demand into market rate and subsidized is simply a function of what is happening at this time. It is more accurate to consider the combined supply and demand because it will change. For example, when facilities have the “luxury” of not taking persons on the Elderly Waiver/Group Residential Housing payment or significantly limiting the number that they take, they will have primarily private pay residents. However, when a “new” product is introduced into the market, depending on what the product and pricing are, this balance will change.

Memory Loss Assisted Living

In 2013, there is an unmet demand for 14 units of market rate memory loss assisted living and an unmet demand for 24 units of subsidized memory loss assisted living. In 2018, there is an unmet demand for 14 units of market rate memory loss assisted living and an unmet demand for 26 units of subsidized memory loss assisted living.

Market Rate Independent and Congregate Housing

For this analysis, the researcher assumed that approximately 50 percent of the demand for market rate independent congregate housing would be met by independent buildings with minimal or no services for residents to accommodate aging in place, and 50 percent of the demand would be for congregate buildings with services available to assist older persons aging in place – catered living. Generally, the monthly fees are less in the totally independent buildings because they are not staffed and there are no services available for residents on a regular basis. It appears reasonable that 50 percent of older persons would be concerned about costs and be willing to forego the availability of services that they did not need at this time. Others are willing and comfortable paying to be in a more service rich environment with the opportunity to age in place on that campus.

Thus, in 2013, there is a total demand for 102 units of market rate independent congregate housing. Assuming 50 percent demand for each type of housing, there would be an unmet demand for 42 units of independent housing with services, and an unmet demand for 43 units of independent housing with no services.

In 2018, there is a total demand for 101 units of market rate independent and congregate housing. Again, assuming 50 percent demand for each type of housing, there would be an unmet demand for 42 units of independent housing with services, and an unmet demand for 42 units of independent housing with no services.

Conclusions and Recommendations

If the developer captured 70 percent of the market for independent senior housing with services, 30 units could be developed based on projections for 2018.

Though there is unmet demand for only one unit for general assisted living in 2018, a new development could potentially capture 50 percent of the total demand (excluding supply), which would be 32 units if you offer the option to be accepted while utilizing Group Residential Housing and Elderly Waiver funding. The capture rate is reduced for general assisted living because, even though the general assisted living that is available is not as attractive as a new development, some

private pay persons will continue to choose Hawley Manor since it is likely to be priced lower than a new development. If the desire is to pursue only the private pay market, the demand would be approximately 15 units.

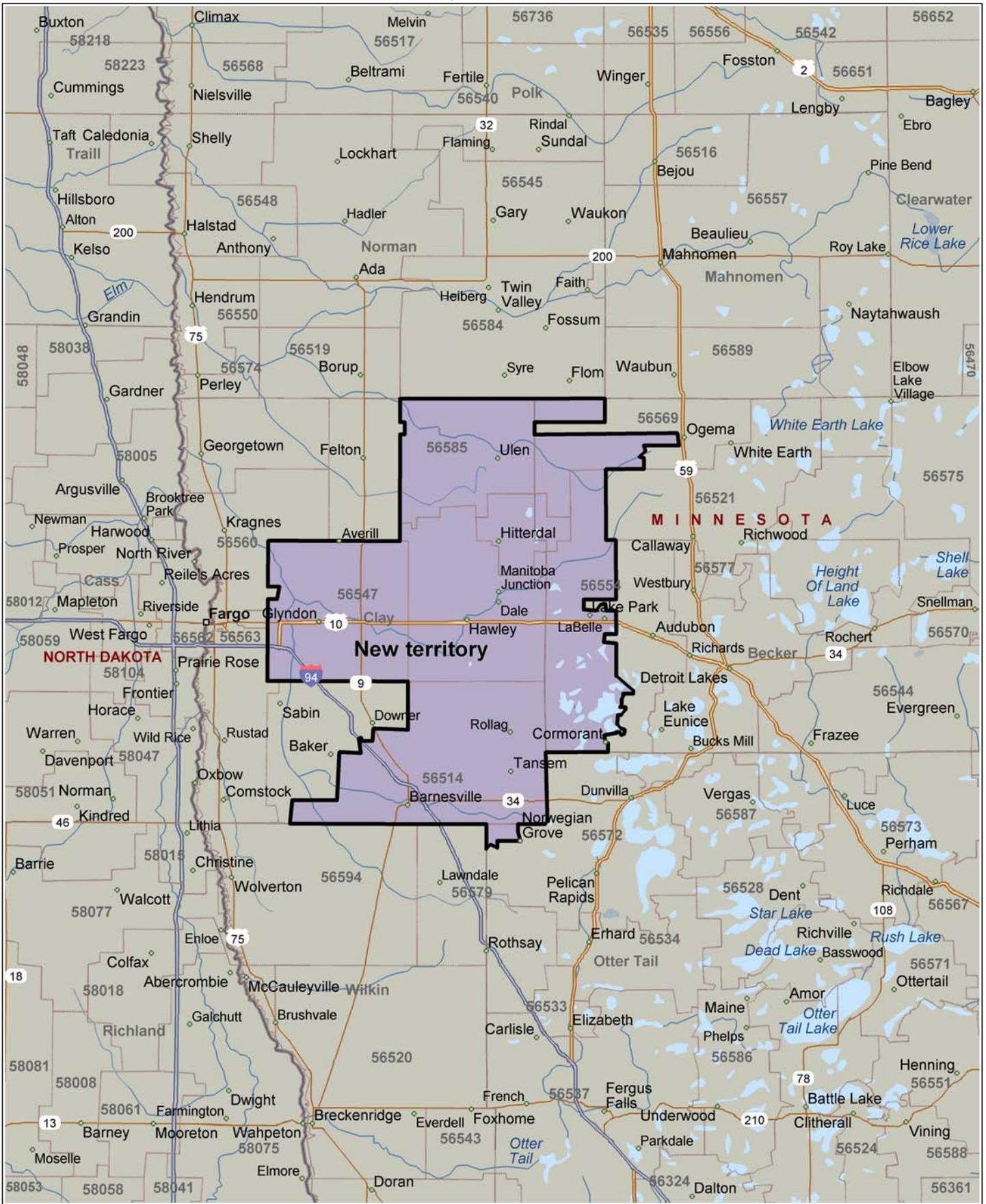
An option to consider is developing an apartment style building, featuring catered living, with the capability of providing various levels of service the person needs. In addition, build cottage style independent living units.

There is also demand for memory loss assisted living. Size depends on the number of persons who are accepted on the Elderly Waiver program and Group Residential Housing.

Limitations of a Market Study

This market study presents an analysis of a given market based on experience in other markets and reasonable industry assumptions about demand. A market study cannot predict what the actual experience in the market will be. Market conditions at the time of the facility's opening, unforeseen and/or unpredictable events occurring in the market, the quality of the product offered, the marketing and management staff and many other events influence the success of a project and are beyond the scope of a market study. The researcher also relies on other sources of data, i.e., Claritas, Inc., Minnesota State Demographic Center, the U.S. Census, and these resources are presumed to be reliable. HP&MR is not responsible for errors in these data sources.

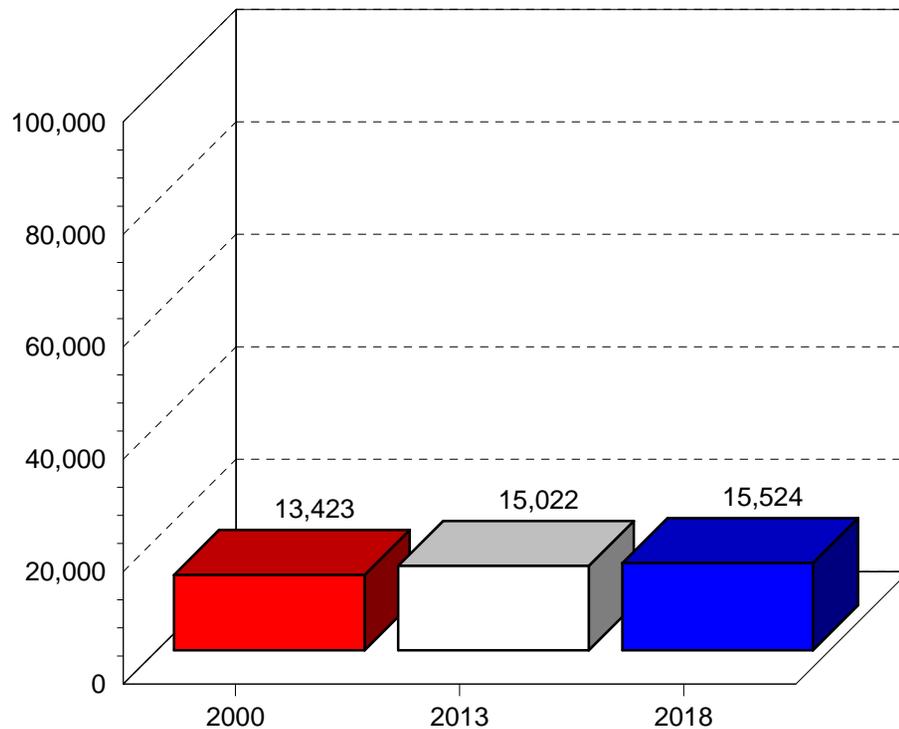
Hawley Market Area



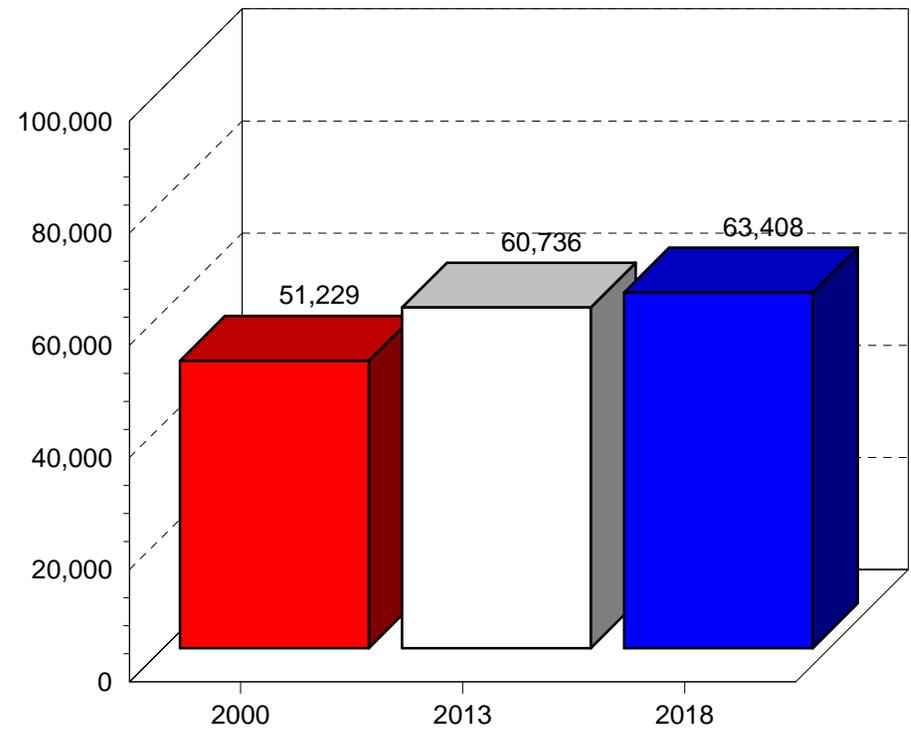
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TOTAL POPULATION FOR THE HAWLEY MARKET AREA AND CLAY COUNTY THE CITY OF HAWLEY, MINNESOTA 2000, 2013 AND 2018

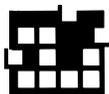
HAWLEY MARKET AREA



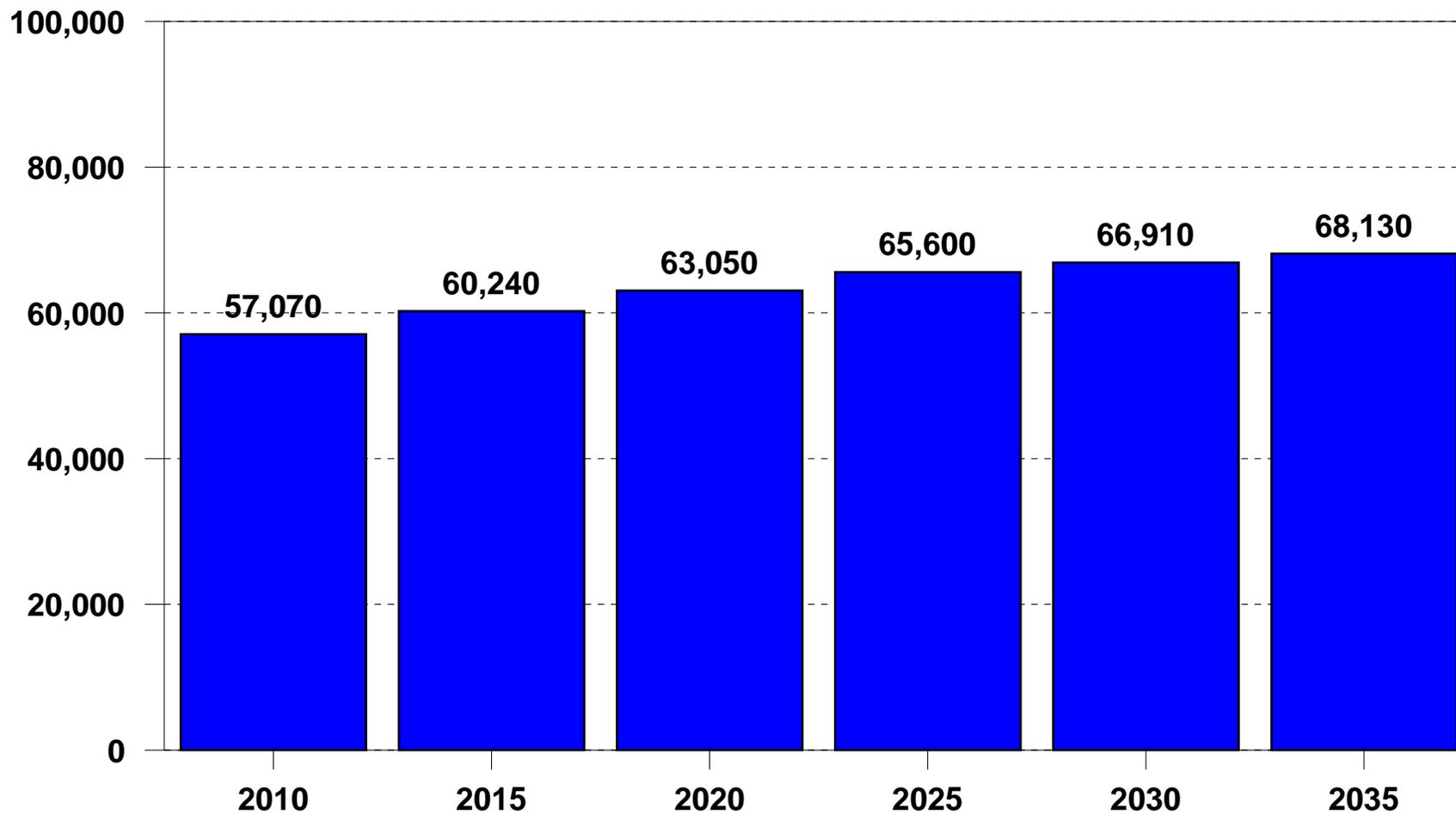
CLAY COUNTY



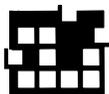
Source: Claritas, Inc.



TOTAL POPULATION CLAY COUNTY THE CITY OF HAWLEY, MINNESOTA 2010 THROUGH 2035

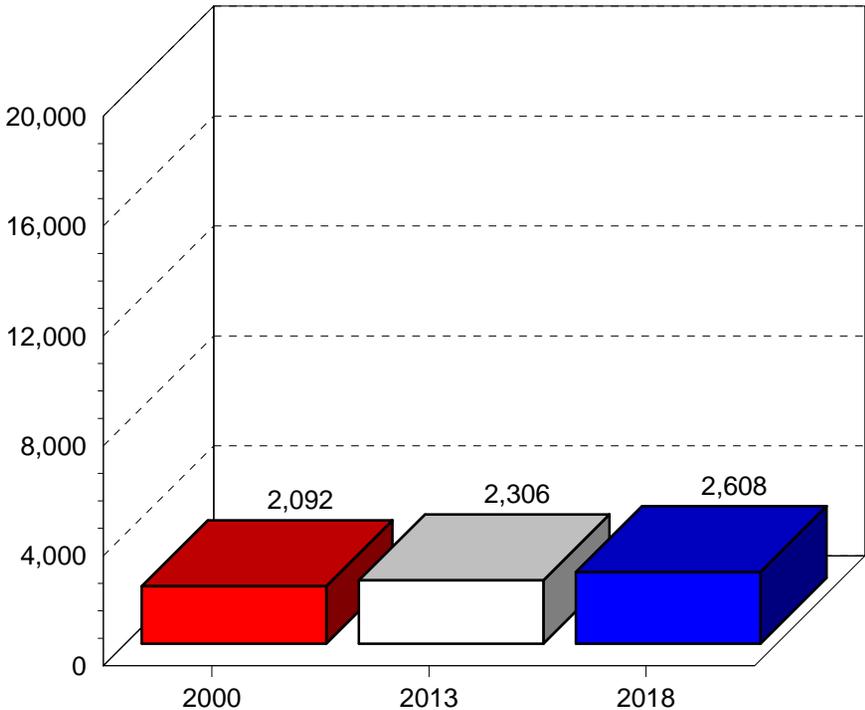


Source: Minnesota State Demographic Center

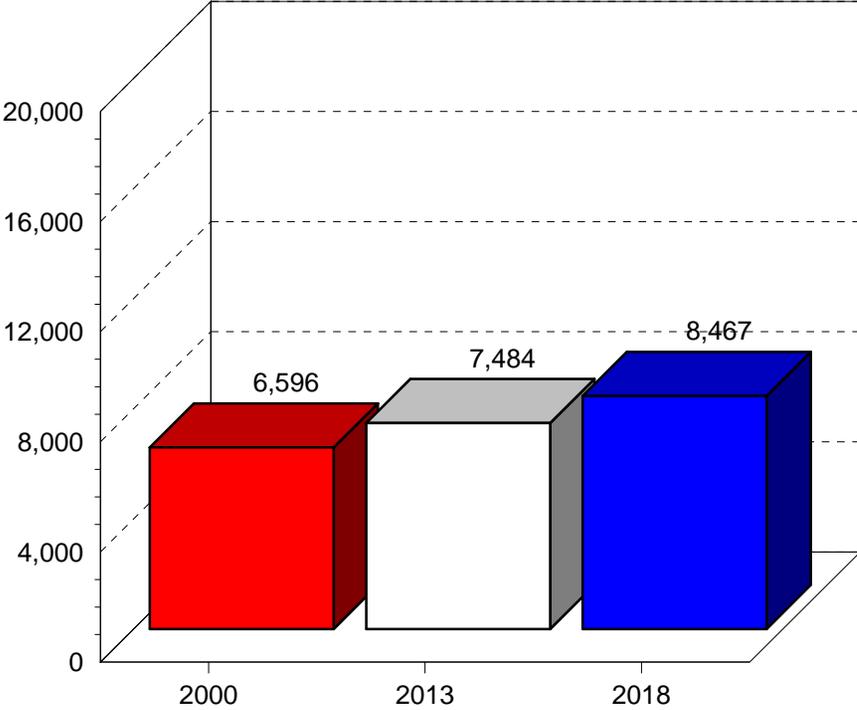


**TOTAL SENIOR POPULATION 65+
FOR THE HAWLEY MARKET AREA AND CLAY COUNTY
THE CITY OF HAWLEY, MINNESOTA
2000, 2013 AND 2018**

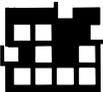
HAWLEY MARKET AREA



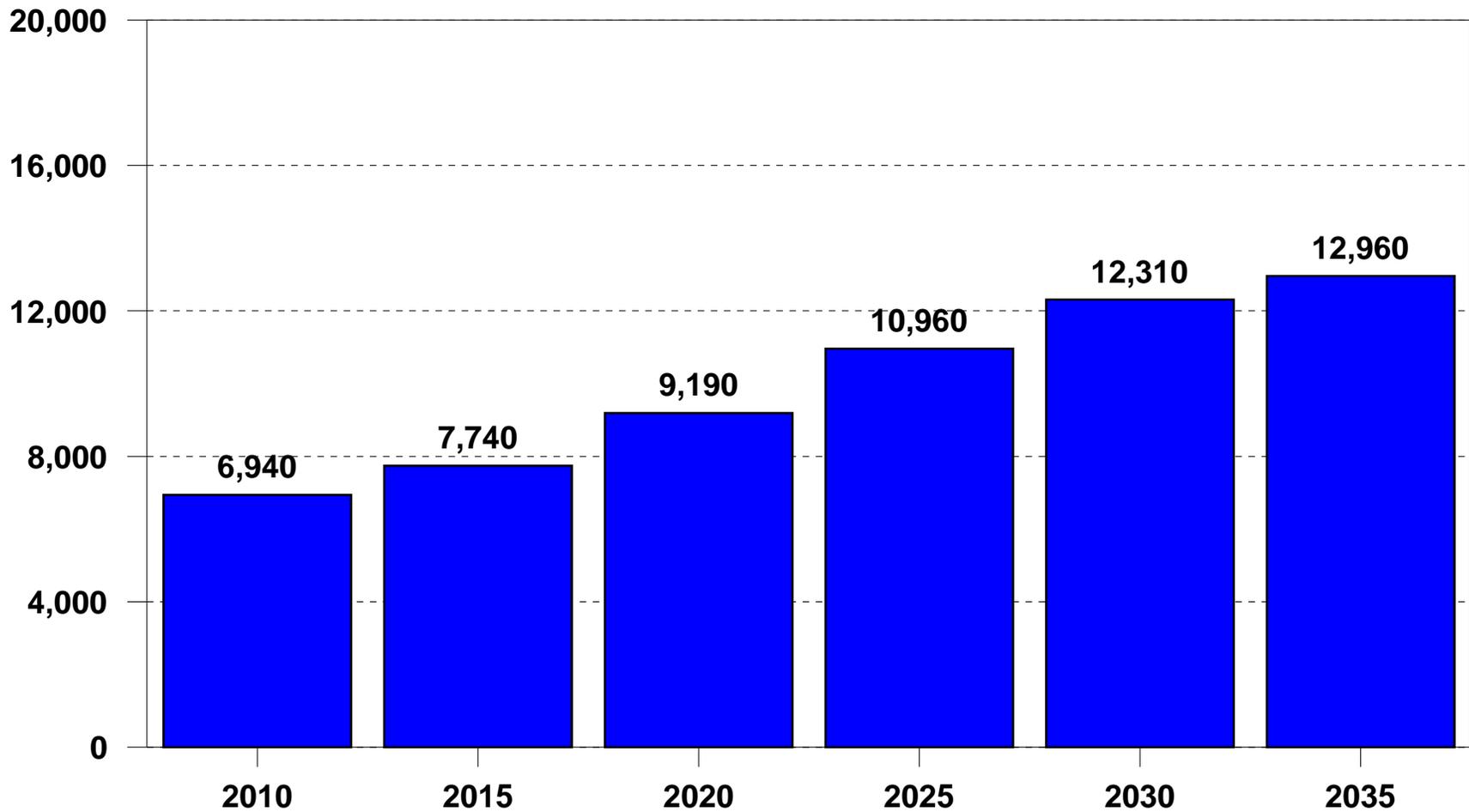
CLAY COUNTY



Source: Claritas, Inc.



**TOTAL SENIOR POPULATION 65+
CLAY COUNTY
THE CITY OF HAWLEY, MINNESOTA
2010 THROUGH 2035**

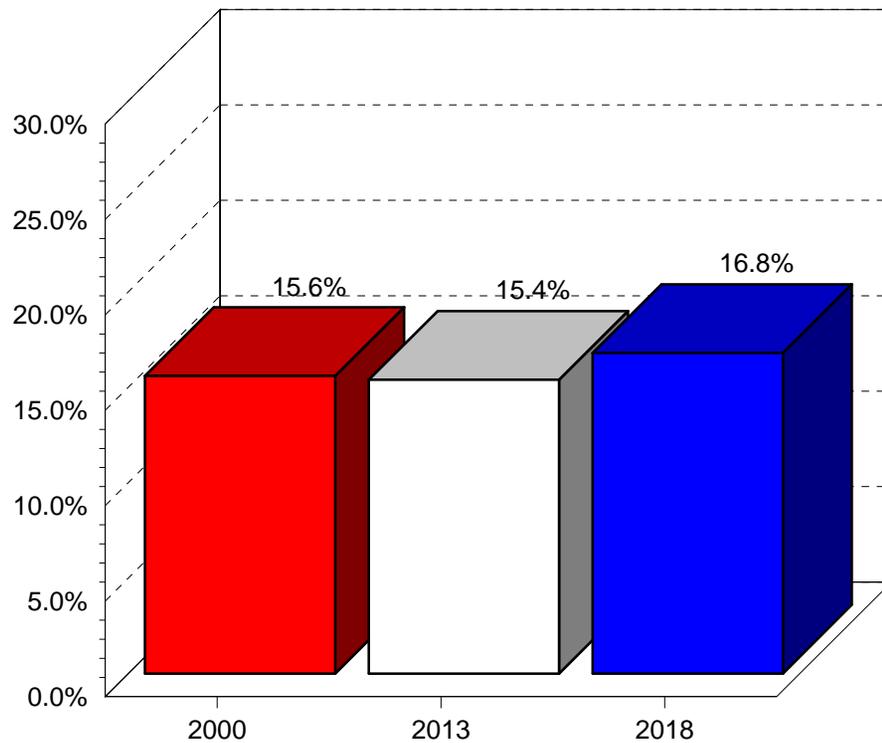


Source: Minnesota State Demographic Center

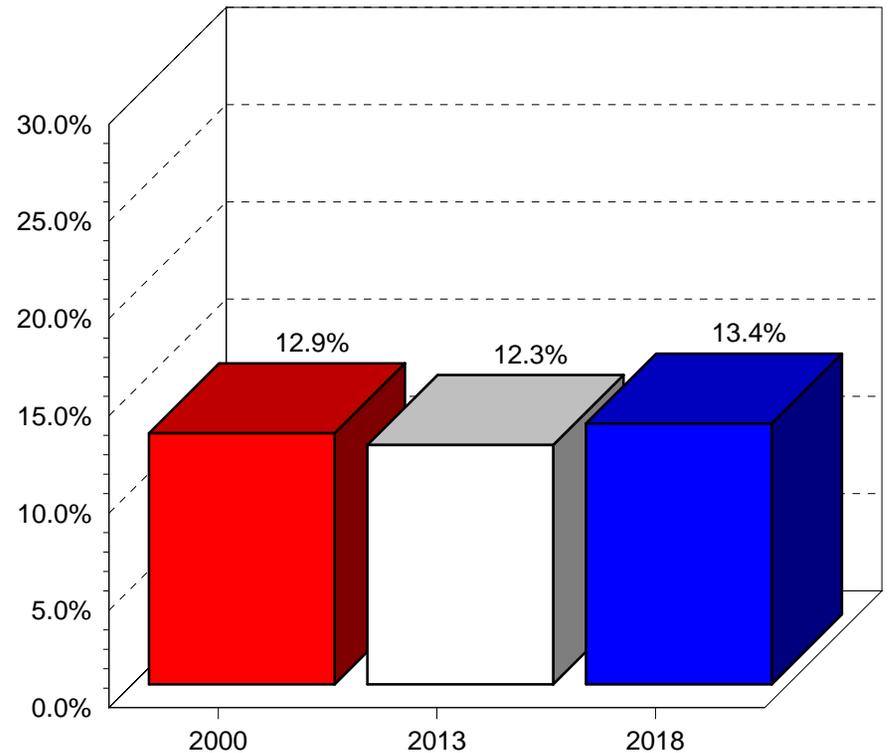


SENIOR POPULATION 65+ AS A PERCENT OF THE TOTAL POPULATION FOR THE HAWLEY MARKET AREA AND CLAY COUNTY THE CITY OF HAWLEY, MINNESOTA 2000, 2013 AND 2018

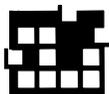
HAWLEY MARKET AREA



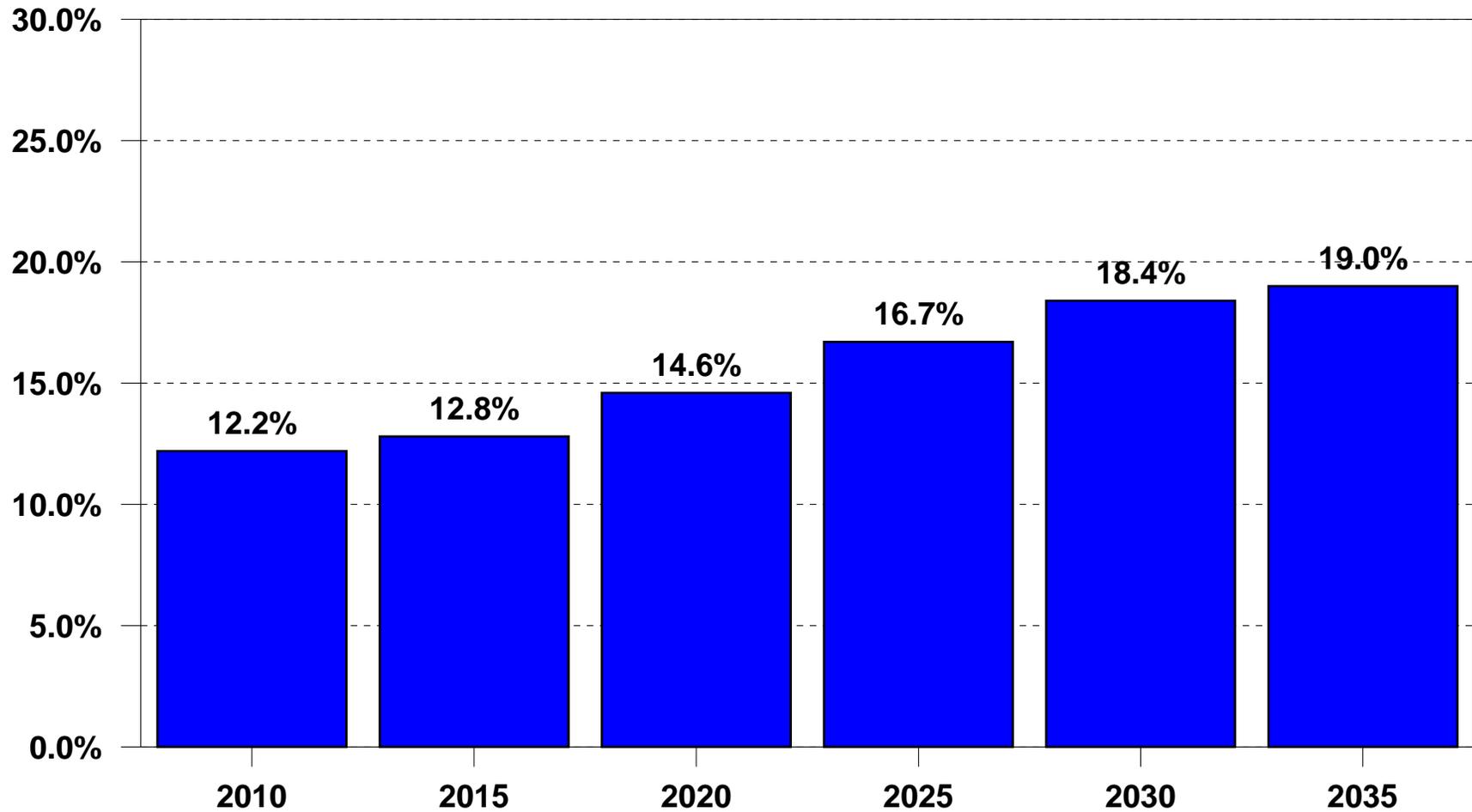
CLAY COUNTY



Source: Claritas, Inc.



**SENIORS (65+) AS A PERCENT OF THE TOTAL POPULATION
CLAY COUNTY
THE CITY OF HAWLEY, MINNESOTA
2010 THROUGH 2035**



Source: Minnesota State Demographic Center



**POPULATION CHANGE BY AGE SEGMENTS
FOR PERSONS 55 YEARS OF AGE AND OLDER
FOR THE HAWLEY MARKET AREA
2000, 2013 AND 2018**

**THE CITY OF HAWLEY
HAWLEY, MINNESOTA**

Age Segment	2000	2013	2018	Population Change 2013 - 2018	Percent Change 2013 - 2018
55-64	1,269	2,018	2,187	+169	+8.4%
65-74	1,071	1,244	1,502	+258	+20.7%
75-84	706	743	771	+28	+3.8%
85+	315	319	335	+16	+5.0%
Total 55+	3,361	4,324	4,795	+471	+10.9%
Total 65+	2,092	2,306	2,608	+302	+13.1%

**POPULATION CHANGE BY AGE SEGMENTS
FOR PERSONS 55 YEARS OF AGE AND OLDER
CLAY COUNTY
2000, 2013 AND 2018**

**THE CITY OF HAWLEY
HAWLEY, MINNESOTA**

Age Segment	2000	2013	2018	Population Change 2013 - 2018	Percent Change 2013 - 2018
55-64	3,747	6,619	7,263	+644	+9.7%
65-74	3,183	3,794	4,736	+942	+24.8%
75-84	2,381	2,419	2,426	+7	+0.3%
85+	1,032	1,271	1,305	+34	+2.7%
Total 55+	10,343	14,103	15,730	+1,627	+11.5%
Total 65+	6,596	7,484	8,467	+983	+13.1%

Source: Claritas, Inc.

**POPULATION CHANGE BY AGE SEGMENTS
FOR PERSONS 55 YEARS OF AGE AND OLDER
CLAY COUNTY
2010, 2015, 2020, 2025, 2030 AND 2035**

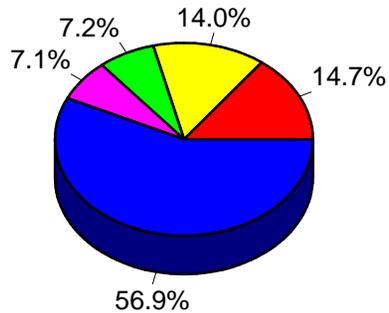
**THE CITY OF HAWLEY
HAWLEY, MINNESOTA**

Age Segment	2010	2015	2020	2025	2030	2035	Population Change 2010 - 2035	Percent Change 2010 - 2035
55-59	3,270	3,700	3,490	2,920	2,750	2,920	-350	-10.7%
60-64	2,320	3,010	3,410	3,230	2,710	2,560	+240	+10.3%
65-69	1,780	2,210	2,850	3,240	3,080	2,610	+830	+46.6%
70-74	1,530	1,750	2,210	2,820	3,190	3,050	+1,520	+99.3%
75-79	1,200	1,340	1,560	1,970	2,490	2,840	+1,640	+136.7%
80-84	1,160	1,020	1,150	1,370	1,730	2,190	+1,030	+88.8%
85+	1,270	1,420	1,420	1,560	1,820	2,270	+1,000	+78.7%
Total 55+	12,530	14,450	16,090	17,110	17,770	18,440	+5,910	+47.2%
Total 65+	6,940	7,740	9,190	10,960	12,310	12,960	+6,020	+86.7%

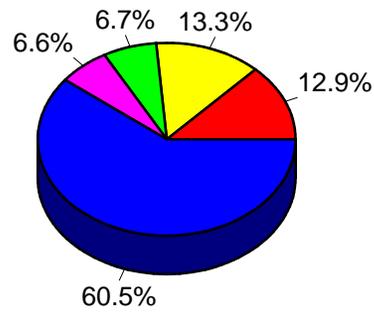
Source: Minnesota State Demographic Center

INCOME DISTRIBUTION OF HOUSEHOLDS WITH HEAD OF HOUSEHOLD AGE 65 TO 74, 75 TO 84 AND 85 AND OLDER FOR THE HAWLEY MARKET AREA THE CITY OF HAWLEY, MINNESOTA 2013 AND 2018

65 TO 74

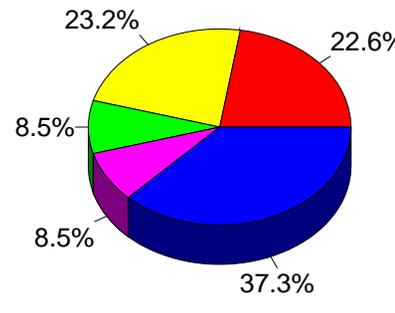


2013
N= 787

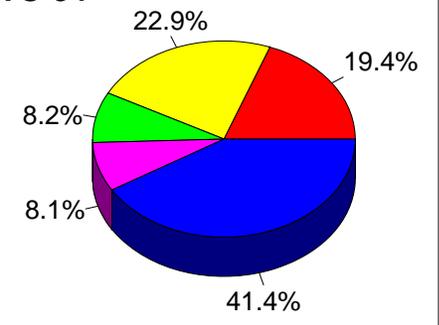


2018
N=960

75 TO 84

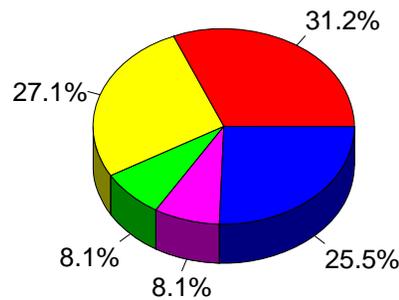


2013
N= 518

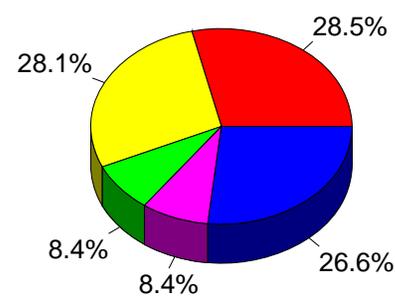


2018
N=546

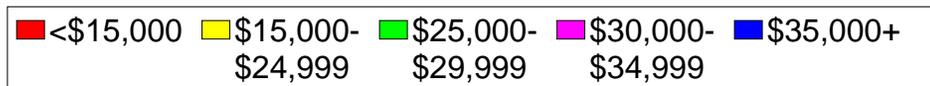
85 AND OLDER



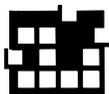
2013
N= 247



2018
N= 263

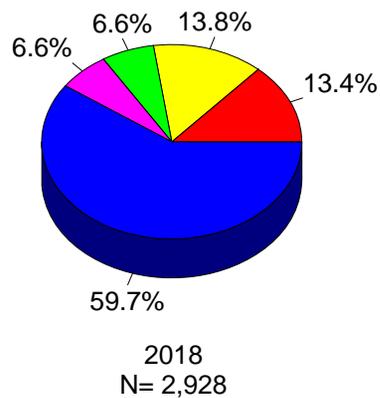
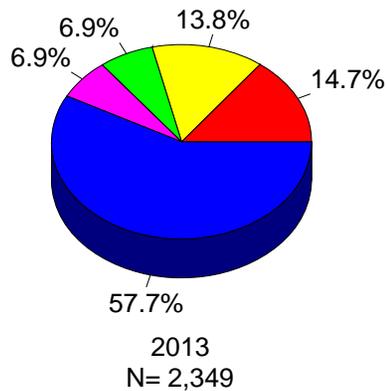


Source: Claritas, Inc.

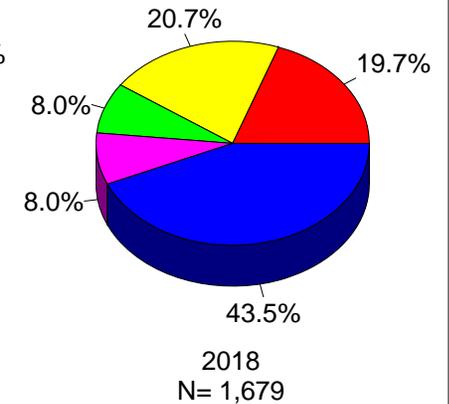
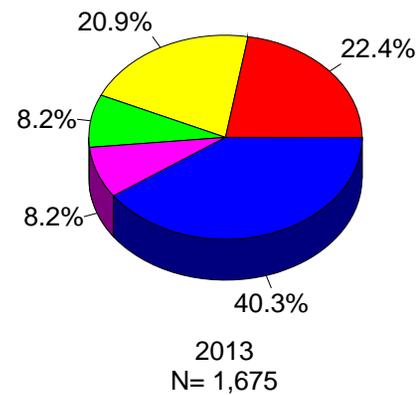


INCOME DISTRIBUTION OF HOUSEHOLDS WITH HEAD OF HOUSEHOLD AGE 65 TO 74, 75 TO 84 AND 85 AND OLDER FOR CLAY COUNTY THE CITY OF HAWLEY, MINNESOTA 2013 AND 2018

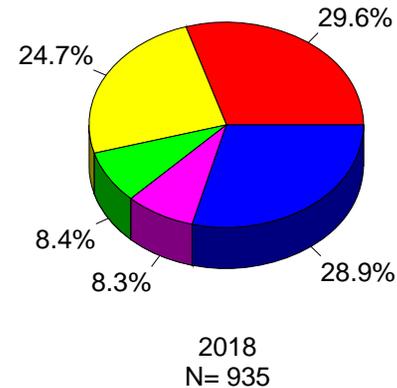
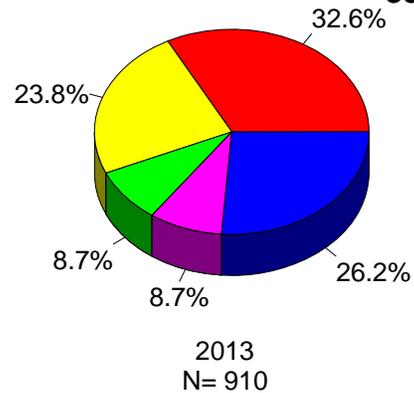
65 TO 74



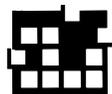
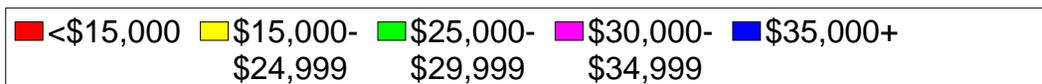
75 TO 84



85 AND OLDER



Source: Claritas, Inc.



**PROFILE OF GENERAL ASSISTED LIVING
IN THE HAWLEY MARKET AREA
THE CITY OF HAWLEY
MARCH 2013
(PAGE 1 OF 1)**

Facility	Capacity Year Built	Percent Occupied on the Day Contacted	Type of Room Available	Market Rate	Subsidized	Services/Amenities included in Rent Package	Services/Amenities Available for Purchase From Building
				Monthly Fees			
Hawley Manor 923 5 th Street Hawley, MN 56549	42	88.1% (37/42)	Private Rooms ½ or ¾ Bathrooms No Kitchen	90.0%	10.0%	3 Meals per day, Laundry, Linen, Housekeeping, and Scheduled Transportation	Personal Care a la Carte
				\$1,500-\$2,100			
Golden Manor of Barnesville 1102 4 th Avenue Northeast Barnesville, MN 56514	10	80.0% (8/10)	Private Rooms ½ Bathrooms No Kitchen	N/A	Accepts	3 Meals per day, Laundry, Linen, Housekeeping, and Scheduled Transportation	Personal Care
				N/A			
Northern Lights Assisted Living 317 1 st Street Northwest Ulen, MN 56585	10 of 19 ¹	80.0% (8/10)	1 Bedroom: 650 s.f. 2 Bedroom: 875 s.f. ¾ Bathroom Kitchen	80.0%	20.0%	1 Meal per day, Laundry, Linen, Housekeeping, and Scheduled Transportation	Additional Meals, Personal Care a la Carte
				1 Bedroom:\$775 2 Bedroom:\$875			
Total	62	85.5% (53/62)					

¹ 10 of these units are occupied by those who are using assisted living services. The other 9 are living independently.

**PROFILE OF GENERAL ASSISTED LIVING
NEAR THE HAWLEY MARKET AREA
THE CITY OF HAWLEY
MARCH 2013
(PAGE 1 OF 2)**

Facility	Capacity	Percent Occupied on the Day Contacted	Type of Room Available	Market Rate	Subsidized	Services/Amenities included in Rent Package	Services/Amenities Available for Purchase From Building
	Year Built			Monthly Fees			
Good Samaritan Society 119 North Broadway Pelican Rapids, MN 56572	23 ¹	76.5% ² (13/17)	16:Efficiency 7:1 Bedroom ½ or ¾ Bathroom ³ Kitchenette	70.0%	30.0% ⁴	2 Meals per day, Laundry, Linen, Housekeeping, and Scheduled Transportation	Additional Meals, Personal Care by Levels (3)
				Efficiency:\$1,695 1 Bedroom:\$1,985			
Riverfront Manor 215 East Mill Avenue Pelican Rapids, MN 56572	20 2002	100.0% (20/20)	Studio:430 s.f. 1 Bedroom:600 s.f. ¾ Bathroom Kitchen	80.0%	20.0% ⁵	1 Meal per day, Housekeeping, and Scheduled Transportation	Additional Meals, Laundry, Linen, and Personal Care
				\$1,710 \$1,947			
Lincoln Terrace 205 3 rd Street Northwest Twin Valley, MN 56584	18 2000	44.4% (8/18)	1 Bedroom 2 Bedroom ¾ Bathroom Kitchenette	0.0%	100.0%	None	All Services Available
				\$846-\$930			

¹ Only 17 of these units are ready to be used as they are going through remodeling.

² Once they reopen, they expect 13 of the units to be filled immediately.

³ Efficiencies have ½ bathrooms and 1 bedrooms have ¾ bathrooms.

⁴ They do not have a cap on those who can be on the Elderly Waiver Program.

⁵ This number is capped at 30 percent

**PROFILE OF GENERAL ASSISTED LIVING
NEAR THE HAWLEY MARKET AREA
THE CITY OF HAWLEY
MARCH 2013
(PAGE 2 OF 2)**

Facility	Capacity	Percent Occupied on the Day Contacted	Type of Room Available	Market Rate	Subsidized	Services/Amenities included in Rent Package	Services/Amenities Available for Purchase From Building
	Year Built			Monthly Fees			
Normandy Apartments 201 3 rd Street Northwest Twin Valley, MN 56584	16	75.0% (12/16)	2 Bedroom (860-884 s.f.) ¾ Bathroom Kitchen	100.0%	0.0%	None	All Services Available and Garages at \$30 per month
				\$1,050-\$1,070			
Vergas Assisted Living 405 East Frazee Avenue Vergas, MN 56587	15	100.0% (15/15)	14:Efficiency 1:1 Bedroom (475 s.f.) ¾ Bathroom Kitchenette	30.0%	70.0%	3 Meals per day, Laundry, Linen, Housekeeping, Scheduled Transportation, and Personal Care	None
	1999			\$2,400-\$2,500			
Total	86	79.1% (68/86)					

Source: Care Providers of Minnesota, Minnesota Department of Health, Aging Services of Minnesota, and information provided by facility to HP&MR in telephone interviews.

**PROFILE OF MARKET RATE INDEPENDENT AND CONGREGATE HOUSING
IN THE HAWLEY MARKET AREA
THE CITY OF HAWLEY
MARCH 2013
(PAGE 1 OF 1)**

Facility	Capacity Year Built	Percent Occupied on the Day Contacted	Type of Room Available	Monthly Fees	Services/Amenities included in Rent Package	Services/ Amenities Available for Purchase From Building
Northern Lights Assisted Living 317 1 st Street Northwest Ulen, MN 56585	9 of 19 ¹	88.9% (8/9)	1 Bedroom: 650 s.f. 2 Bedroom: 875 s.f.	\$625-\$725	None	None
Northern Lights Assisted Living 317 1 st Street Northwest Ulen, MN 56585	8	87.5% (7/8)	2 Bedroom: 1,325 s.f.	\$850	None	None
Total	17	88.2% (15/17)				

Source: Care Providers of Minnesota, Minnesota Department of Health, Aging Services of Minnesota, and information provided by facility to HP&MR in telephone interviews.

¹ 9 of these units are occupied by those who are living independently. The other 10 are using assisted living services.

**DEMAND FOR GENERAL ASSISTED LIVING UNITS
FOR THE HAWLEY MARKET AREA
THE CITY OF HAWLEY, HAWLEY, MINNESOTA**

2013	Number of Income and Disability Qualified Persons in the Market Area ¹	DEMAND ⁴	Demand Adjusted for Homeownership For Incomes of \$25,000 to \$29,999⁵
<\$15,000	32	10	10
\$15,000 - \$19,999	15	5	5
\$20,000 - \$24,999	15	5	5
\$25,000 - \$29,999	<u>11</u>	<u>3</u>	<u>0</u>
² Total <\$30,000	73	23	20
\$30,000 - \$34,999	11	3	6
\$35,000 +	<u>54</u>	<u>16</u>	<u>16</u>
³ Total \$30,000 +	65	19	22
2018	Number of Income and Disability Qualified Persons in the Market Area ¹	DEMAND ⁴	Demand Adjusted for Homeownership For Incomes of \$30,000 to \$34,999⁵
<\$15,000	31	9	9
\$15,000 - \$24,999	32	10	10
\$25,000 - \$29,999	11	3	3
\$30,000 - \$34,999	<u>11</u>	<u>3</u>	<u>0</u>
² Total <\$35,000	85	25	22
\$35,000 - \$39,999	11	3	6
\$40,000 +	<u>54</u>	<u>16</u>	<u>16</u>
³ Total \$35,000 +	65	19	22

¹ Based on estimated number of seniors with 3+ limitations in activities of daily living

² Based on head of household income of <\$30,000 in 2016 and <\$35,000 in 2018

³ Based on head of household income of \$30,000+ in 2013 and \$35,000+ in 2018

⁴ Market demand at 30.0 percent of income and disability qualified persons

⁵ 85.1 percent of households in the income categories \$25,000 to \$29,999 in 2013 and \$30,000 to \$34,999 in 2018 will be able to afford the proposed project based on income realized from the sale of their homes and investment of the principal

**NUMBER OF PERSONS WITH MODERATE OR SEVERE ALZHEIMER'S DISEASE
FOR THE HAWLEY MARKET AREA
THE CITY OF HAWLEY, HAWLEY, MINNESOTA
2013 AND 2018**

Age Segment	Percentage with Moderate or Severe Alzheimer's Disease	Population	Number of Persons with Alzheimer's Disease¹	Number of Persons with Alzheimer's Disease Who Will Be Cared For Outside Their Home²	Market Rate Demand³	Subsidized Demand⁴
2013						
65-69	0.6%	622	3.73	1.12	0.64	0.48
70-74	1.3%	622	8.09	2.43	1.38	1.04
75-79	2.5%	372	9.30	2.79	1.04	1.75
80-84	5.1%	371	18.92	5.68	2.11	3.56
85+	48.1%	319	153.44	46.03	11.74	34.29
Total		2,306	193.48	58.04	16.91	41.13
2018						
65-69	0.6%	751	4.51	1.35	0.77	0.58
70-74	1.3%	751	9.76	2.93	1.67	1.26
75-79	2.5%	386	9.65	2.90	1.08	1.82
80-84	5.1%	385	19.64	5.89	2.19	3.70
85+	48.1%	335	161.14	48.34	12.87	35.47
Total		2,608	204.69	61.41	18.58	42.83

¹ Due to fractions of numbers and application of "rounding" rules, numbers on this chart and the following chart may vary by small amounts

² Based on research completed by the Alzheimer's and Related Disorders Association, approximately 30 percent of persons with the disease will need to be cared for outside of the home

³ Based on head of household income of \$35,000+ in 2013 and \$40,000+ in 2018

⁴ Based on head of household income of <\$35,000 in 2013 and <\$40,000 in 2018

Source: Alzheimer's Disease, Estimates of Prevalence in the United States, Report to the Secretary of Health and Human Services, January 1998, and Claritas, Inc.

**DEMAND FOR MEMORY LOSS UNITS
FOR THE HAWLEY MARKET AREA
THE CITY OF HAWLEY, HAWLEY, MINNESOTA**

2012	Number of Persons with Alzheimer's Disease	Number of Persons with Alzheimer's Disease who will be Cared for Outside of Their Home ¹	Assisted Living Demand ²	Nursing Home Demand ³
<\$15,000	55.95	16.78	6.71	10.07
\$15,000 - \$24,999	49.81	14.94	5.98	8.97
\$25,000 - \$29,999	15.68	4.70	1.88	2.82
\$30,000 - \$34,999	<u>15.66</u>	<u>4.70</u>	<u>1.88</u>	<u>2.82</u>
⁴ Total <\$35,000	137.09	41.13	16.45	24.68
\$35,000 +	<u>56.38</u>	<u>16.91</u>	<u>10.15</u>	<u>6.77</u>
⁵ Total \$35,000 +	56.38	16.91	10.15	6.77
2018	Number of Persons with Alzheimer's Disease	Number of Persons with Alzheimer's Disease who will be Cared for Outside of Their Home ¹	Assisted Living Demand ²	Nursing Home Demand ³
<\$15,000	53.48	16.04	6.42	9.63
\$15,000 - \$24,999	53.95	16.18	6.47	9.71
\$25,000 - \$29,999	16.82	5.05	2.02	3.03
\$30,000 - \$34,999	16.80	5.04	2.02	3.02
\$35,000 - \$39,999	<u>7.81</u>	<u>2.34</u>	<u>0.94</u>	<u>1.41</u>
⁴ Total <\$40,000	148.85	44.66	17.86	26.79
\$40,000 +	<u>55.85</u>	<u>16.75</u>	<u>10.05</u>	<u>6.70</u>
⁵ Total \$40,000 +	55.85	16.75	10.05	6.70

¹ Based on research completed by the Alzheimer's and Related Disorders Association, approximately 30 percent of persons with the disease will need to be cared for outside of the home

² Approximately 60 percent of the market rate demand and 40 percent of the subsidized demand will use assisted living

³ Approximately 60 percent of the subsidized demand and 40 percent of the market rate demand will use skilled nursing

⁴ Based on head of household income of <\$35,000 in 2012 and <\$40,000 in 2018

⁵ Based on head of household income of \$35,000+ in 2012 and \$40,000+ in 2018

**DEMAND FOR INDEPENDENT AND CONGREGATE HOUSING UNITS
FOR THE HAWLEY MARKET AREA
THE CITY OF HAWLEY, HAWLEY, MINNESOTA**

2013	Number of Income Qualified Households in the Market Area		DEMAND			Demand Adjusted for Homeownership For Incomes of \$25,000 to \$29,999 ³	
	65-74	75+	65-74	75+	Total	Total	
<\$15,000	116	194	7	58	65	65	
\$15,000 - \$19,999	55	94	3	28	31	31	
\$20,000 - \$24,999	55	93	3	28	31	31	
\$25,000 - \$29,999	<u>57</u>	<u>64</u>	<u>3</u>	<u>19</u>	<u>22</u>	<u>3</u>	
¹ Total <\$30,000	283	445	16	133	149	130	
\$30,000 - \$34,999	56	64	1	10	11	30	
\$35,000 +	<u>448</u>	<u>256</u>	<u>4</u>	<u>38</u>	<u>42</u>	<u>42</u>	
² Total \$30,000 +	504	320	5	48	53	72	

2018	Number of Income Qualified Households in the Market Area		DEMAND			Demand Adjusted for Homeownership For Incomes of \$30,000 to \$34,999 ³	
	65-74	75+	65-74	75+	Total	Total	
<\$15,000	124	181	7	54	61	61	
\$15,000 - \$24,999	128	199	8	60	68	68	
\$25,000 - \$29,999	64	67	4	20	24	24	
\$30,000 - \$34,999	<u>63</u>	<u>66</u>	<u>4</u>	<u>20</u>	<u>24</u>	<u>4</u>	
¹ Total <\$35,000	379	513	23	154	177	157	
\$35,000 - \$39,999	82	60	1	9	10	30	
\$40,000 +	<u>499</u>	<u>236</u>	<u>5</u>	<u>35</u>	<u>40</u>	<u>40</u>	
² Total \$35,000 +	581	296	6	44	50	70	

¹ Based on head of household income of <\$30,000 in 2013 and <\$35,000 in 2018, market demand was calculated at 6.0 percent of head of households aged 65 to 74 and 30.0 percent of head of households aged 75 years of age and older

² Based on head of household income of \$30,000+ in 2013 and \$35,000+ in 2018, market demand was calculated at 1.0 percent of head of households aged 65 to 74 and 15.0 percent of head of households aged 75 years of age and older

³ 85.1 percent of households in the income categories \$25,000 to \$29,999 in 2013 and \$30,000 to \$34,999 in 2018 will be able to afford the proposed project based on income realized from the sale of their homes and investment of the principal

**SUMMARY OF SUPPLY AND DEMAND
FOR THE HAWLEY MARKET AREA
THE CITY OF HAWLEY, HAWLEY, MINNESOTA
2013**

	SUMMARY OF SUPPLY AND DEMAND FOR THE MARKET AREA			SUMMARY OF SUPPLY AND DEMAND FOR INDIVIDUALS FROM THE MARKET AREA AND FROM OUTSIDE THE MARKET AREA			UNMET DEMAND OR (EXCESS)
	Demand For the Market Area	Number of Units Serving the Market Area	Additional Demand (Oversupply) To Serve the Market Area	Additional Demand To Serve Individuals Outside the Market Area	Demand For the Market Area and Outside the Market Area ¹	Number of Units Operating Within the Market Area	
General Assisted Living - Market Rate	22	36	(14)	9	31	51	(20)
General Assisted Living - Subsidized	20	8	13	9	29	11	18
Memory Loss Assisted Living - Market Rate	10	0	10	4	14	0	14
Memory Loss Assisted Living - Subsidized	16	0	16	7	24	0	24
Independent Congregate Housing - Market Rate	72	12	60	31	102	17	
Housing with Services/Catered Living					51	9	42
Independent Housing with No Services					51	8	43

¹ The demand assumes 70 percent of the total units will be filled by persons from the market area and an additional 30 percent will be filled by persons from outside of the market area.

**SUMMARY OF SUPPLY AND DEMAND
FOR THE HAWLEY MARKET AREA
THE CITY OF HAWLEY, HAWLEY, MINNESOTA
2018**

	SUMMARY OF SUPPLY AND DEMAND FOR THE MARKET AREA			SUMMARY OF SUPPLY AND DEMAND FOR INDIVIDUALS FROM THE MARKET AREA AND FROM OUTSIDE THE MARKET AREA			UNMET DEMAND OR (EXCESS)
	Demand For the Market Area	Number of Units Serving the Market Area	Additional Demand (Oversupply) To Serve the Market Area	Additional Demand To Serve Individuals Outside the Market Area	Demand For the Market Area and Outside the Market Area ¹	Number of Units Operating Within the Market Area	
General Assisted Living - Market Rate	22	36	(14)	9	31	51	(20)
General Assisted Living - Subsidized	22	8	15	10	32	11	21
Memory Loss Assisted Living - Market Rate	10	0	10	4	14	0	14
Memory Loss Assisted Living - Subsidized	18	0	18	8	26	0	26
Independent Congregate Housing - Market Rate	70	12	59	30	101	17	
Housing with Services/Catered Living					51	9	42
Independent Housing with No Services					50	8	42

¹ The demand assumes 70 percent of the total units will be filled by persons from the market area and an additional 30 percent will be filled by persons from outside of the market area.

APPENDIX

**PROFILE OF GENERAL ASSISTED LIVING
IN THE GREATER FARGO MOORHEAD MARKET AREA
EVENTIDE SENIOR LIVING COMMUNITIES, MOORHEAD, MINNESOTA
FEBRUARY 2013
(PAGE 1 OF 7)**

Facility ¹	Capacity Year Built	Percent Occupied on the Day Contacted	Type of Room Available	Market Rate	Subsidized	Services/Amenities included in Rent Package	Services/Amenities Available for Purchase From Building
				Monthly Fees			
Eventide Fairmont 801 Second Avenue North Moorhead, MN 56560 (HWS)	69	95.7% (66/69)	Companion Suites 1 Bedroom 2 Bedroom Full Bathroom No Kitchen	50.0%	50.0%	3 meals per day, Housekeeping and Scheduled Transportation	Laundry, Linen, and Personal Care
				\$1,857-\$2,200			
Eventide Linden Tree Circle 1400 Seventh Street South Moorhead, MN 56560 (HWS)	119	97.5% (116/119)	1 Bedroom (471-905 s.f.) 2 Bedroom (676-1,089 s.f.) ¾ or Full Bathroom Kitchen	100.0%	0.0%	Housekeeping and Scheduled Transportation	3 meals per day, Laundry, Linen, and Personal Care
				\$1,580-\$2,214 \$2,030-\$2,645			
Sheyenne Crossings - East 225 13 th Avenue West West Fargo, ND 58078 (AL)	36 2006	86.1% (31/36)	Studio 1 Bedroom 2 Bedroom (450-1,000 s.f.) ¾ Bathroom Kitchenette	100.0%	0.0%	3 meals per day, Laundry, Linen, Housekeeping, Scheduled Transportation, and Personal Care	Garage at \$50 per month
				Studio:\$1,666 1 Bedroom:\$2,588-\$2,861 2 Bedroom:\$3,044			

¹ Facilities are licensed/registered as follows:

(AL) Assisted Living in the State of North Dakota

(BC) Basic Care in the State of North Dakota

(HWS) Housing with Services; most also have a Class F home care license or contract with an independent home care agency

**PROFILE OF GENERAL ASSISTED LIVING
IN THE GREATER FARGO MOORHEAD MARKET AREA
EVENTIDE SENIOR LIVING COMMUNITIES, MOORHEAD, MINNESOTA
FEBRUARY 2013
(PAGE 2 OF 7)**

Facility	Capacity	Percent Occupied on the Day Contacted	Type of Room Available	Market Rate	Subsidized	Services/Amenities included in Rent Package	Services/Amenities Available for Purchase From Building
	Year Built			Monthly Fees			
Sheyenne Crossings - West 225 13 th Avenue West West Fargo, ND 58078 (AL)	67	95.5% (64/67)	1 Bedroom 2 Bedroom (650-1,090 s.f.) ¾ Bathroom Kitchen	100.0%	0.0%	30 meals per month, Housekeeping, and Scheduled Transportation	Additional meals, Laundry, Linen, Personal Care, Heated Parking at \$50 per month
				1 Bedroom:\$1,872-\$2,199 2 Bedroom:\$2,347-\$2,645			
Good Samaritan – Prairie Villa 150 County Road 34 Arthur, ND 59006 (AL) ¹	30 ²	N/A	24:Studio 6:1 Bedroom ¾ Bathroom Kitchenette	N/A	N/A	3 meals per day, Laundry, Linen, Housekeeping, Scheduled Transportation, and Personal Care ³	None
				N/A			
Houge Estates 510 Center Avenue East Dilworth, MN 56529 (HWS)	26 of 60 ⁴	100.0% (26/26)	1 Bedroom Full Bathroom Kitchen	7.7%	92.3%	None	3 meals per day, Laundry, Linen, Housekeeping, Scheduled Transportation, and Personal Care
	1980			Income based + Pay for services			

¹ Good Samaritan does not release information.

² The 24 studios are licensed as basic care. The six 1 bedrooms are licensed as assisted living.

³ Those on assisted living can choose to have services as needed.

⁴ Houge Estates is a subsidized independent apartment building that has 24-hour assisted living services offered in the building by an independent agency. Currently 26 of the residents are using assisted living services.

**PROFILE OF GENERAL ASSISTED LIVING
IN THE GREATER FARGO MOORHEAD MARKET AREA
EVENTIDE SENIOR LIVING COMMUNITIES, MOORHEAD, MINNESOTA
FEBRUARY 2013
(PAGE 3 OF 7)**

Facility	Capacity Year Built	Percent Occupied on the Day Contacted	Type of Room Available	Market Rate	Subsidized	Services/Amenities included in Rent Package	Services/Amenities Available for Purchase From Building
				Monthly Fees			
Serenity Assisted Living 1125 Oakview Drive Dilworth, MN 56529 ¹ (HWS)	23 2008	100.0% (23/23)	6: Studio (380 s.f.) 15:1 Bedroom (530 s.f.) 2:2 Bedroom (750 s.f.) ¾ Bathroom Kitchen	40.0%	60.0%	3 meals per day, Laundry, Linen, Housekeeping, Scheduled Transportation, and Personal Care	None
				Studio:\$3,190 1 Bedroom:\$3,490 2 Bedroom:\$3,790			
Bethany Towers I 201 South University Drive Fargo, ND 58103 (AL)	53 ² 1968	94.3% (50/53)	1 Person Units 2 Person Units ¾ or Full Bathrooms No Kitchen	30.0%	70.0%	3 meals per day, Laundry, Linen, Housekeeping, and Scheduled Transportation	Personal Care
				1 Person:\$1,533-\$1,763 2 Person:\$2,432-\$3,066 Basic Care: \$83.37 per day			
Bethany Towers II 201 South University Drive Fargo, ND 58103 (AL)	90 1978	92.2% (83/90)	88:Studio 6:1 Bedroom ¾ or Full Bathroom Kitchen or No Kitchen ³	60.0%	40.0%	3 meals per day, Laundry, Linen, Housekeeping, and Scheduled Transportation	Personal Care
				1 Occupant Studio: \$1,701-\$1,851 2 Occupant Studio: \$2,335-\$2,485 1 Occupant 1 Bedroom: \$2,923 2 Occupant 1 Bedroom: \$3,557			

¹ Serenity Assisted Living will be adding an additional 19 units in March. These two building will be divided into East and West campuses.

² 40 of these units are basic care and the rest are assisted living. The plan is to convert the 13 assisted living units to basic care.

³ The 1 Bedroom units have kitchens and full bathrooms, the studios do not.

**PROFILE OF GENERAL ASSISTED LIVING
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Facility	Capacity Year Built	Percent Occupied on the Day Contacted	Type of Room Available	Market Rate	Subsidized	Services/Amenities included in Rent Package	Services/Amenities Available for Purchase From Building
				Monthly Fees			
Bethany – The Gables 4255 30 th Avenue South Fargo, ND 58103 (AL)	40 2010	90.0% (36/40)	31: 1 Bedroom (520-546 s.f.) 8:2 Bedroom (908 s.f.) ¾ Bathroom Kitchen	100.0%	0.0%	1 meal per day, Laundry, Linen, Housekeeping, and Scheduled Transportation	2 meals per day, Personal Care, and a Garage at \$45 per month
				1 Bedroom: \$2,195-\$2,315 2 Bedroom: \$2,890			
Edgewood Vista of Fargo ¹ 4420 37 th Avenue South Fargo, ND 58104 (BC) (AL)	69 ² 2007	N/A	Studio 1 Bedroom ¾ Bathroom Kitchen or Kitchenette ³	90.0%	10.0%	3 meals per day, Housekeeping, and Scheduled Transportation,	Laundry, Linen, and Personal care
				\$1,995-\$2,425			
Evergreens of Fargo 1401 West Gateway Drive Fargo, ND 58103 (BC)	30	86.7% (26/30)	Suite (140-200 s.f.) ¾ Bathroom No Kitchen	61.5%	38.5%	3 meals per day, Laundry, Linen, Housekeeping, and Scheduled Transportation	Personal Care A la Carte
				\$3,052-\$3,728			

¹ Edgewood Vista would not share information. Info has been gathered from the North Dakota Department of Health and Human Services and previous studies.

² Of these 85 units, 18 are licensed as basic care. The remaining are licensed as assisted living.

³ Studios are equipped with a kitchenette and the 1 bedrooms have a full kitchen.

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Facility	Capacity Year Built	Percent Occupied on the Day Contacted	Type of Room Available	Market Rate	Subsidized	Services/Amenities included in Rent Package	Services/Amenities Available for Purchase From Building
				Monthly Fees			
Good Samaritan Society ¹ 4502 37 th Avenue South Fargo, ND 58104 (BC) (AL)	34 2008	100.0% (34/34) ²	1 Bedroom (550 s.f.) 2 Bedroom (765 s.f.) ¾ Bathroom Kitchen	N/A	N/A	3 meals per day, Laundry, Linen, Housekeeping, Scheduled Transportation, and Basic Personal Care	Garage at \$40 per month
				1-Bedroom: \$1,990+ 2-Bedroom: \$2,300+			
Good Samaritan Society 4502 37 th Avenue South Fargo, ND 58104 (BC) (AL)	36 2008	100.0% (36/36)	1 Bedroom (456 s.f.) ¾ Bathroom Kitchenette	N/A	N/A	3 meals per day, Laundry, Linen, Housekeeping, Scheduled Transportation, and Basic Personal Care	Garage at \$40 per month
				\$105 Per day			
Pioneer House 3540 South University Dr. Fargo, ND 58104 (AL)	48	100.0% (48/48)	Studio 1 Bedroom 2 Bedroom (414-789 s.f.) ¾ Bathroom Kitchenette	100.0%	0.0%	3 meals per day, Laundry, Linen, Housekeeping, and Scheduled Transportation	Personal Care A la Carte
				\$2,800-\$4,000			

¹ Good Samaritan does not release information. Info has been gathered from their website and the North Dakota Department of Health and Human Services. According to the State of North Dakota licensed facility directories, Good Samaritan has 70 total units divided into 40 units of licensed basic care, 13 units of assisted living, and 17 apartments described as housing with services for independent persons.

² Occupancy based on information furnished by Good Samaritan to the State Association for a report to the Legislature.

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Facility	Capacity Year Built	Percent Occupied on the Day Contacted	Type of Room Available	Market Rate	Subsidized	Services/Amenities included in Rent Package	Services/Amenities Available for Purchase From Building
				Monthly Fees			
Riverview Place 5300 12 th Street South Fargo, ND 58104 (AL)	54	88.8% (48/54)	Studio (450 s.f.) 1 Bedroom (550-700 s.f.) 2 Bedroom (650-900 s.f.) Full Bathroom Kitchen	100.0%	0.0%	Scheduled Transportation	3 meals per day, Laundry, Linen, Housekeeping, Personal Care, and a Garage at \$40 per month
Touchmark at Harwood Groves 1200 Harwood Drive Fargo, ND 58103 (AL)	70	95.7% (67/70)	Studio 1 Bedroom 2 Bedroom $\frac{3}{4}$ Bathroom Kitchen or Kitchenette	100.0%	0.0%	3 meals per day, Laundry, Linen, Housekeeping, and Scheduled Transportation	Personal Care and a Garage at \$50 per month
Arbor Park at Moorhead 2901 Sixth Avenue North Moorhead, MN 56560 (HWS)	15	100.0% (15/15)	1 Bedroom (420 s.f.) $\frac{3}{4}$ Bathroom Kitchenette	50.0%	50.0%	3 Meals per day and Scheduled Transportation	Laundry, Linen, Housekeeping, and Personal Care

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Facility	Capacity	Percent Occupied on the Day Contacted	Type of Room Available	Market Rate	Subsidized	Services/Amenities included in Rent Package	Services/Amenities Available for Purchase From Building
	Year Built			Monthly Fees			
Moorhead Manor 1710 13 th Avenue North Moorhead, MN 56560 (HWS)	31	71.0% (22/31)	Suite Private and Shared Bathroom No Kitchen	9.0%	91.0%	3 meals per day, Laundry, Linen, Housekeeping, and Scheduled Transportation	Personal Care
				Private pay:\$867 Others are income based			
River Pointe of Moorhead 2401 South 11 th Street Moorhead, MN 56560 (HWS)	59 2009	100.0% (59/59)	1 Bedroom (581, 673 s.f.) 2 Bedroom (824, 927 s.f.) ¾ Bathroom Kitchen	90.0%	10.0%	1 meal per day, Laundry, Linen, Housekeeping, and Scheduled Transportation	2 meals per day and Personal Care A la Carte
				1 Bedroom: \$1,995-\$2,300 2 Bedroom: \$2,600-\$2,895			
Total	999	94.4% (850/900)					

Source: Care Providers of Minnesota, Minnesota Department of Health, Aging Services of Minnesota, and information provided by facility to HP&MR in telephone interviews.

**PROFILE OF MEMORY LOSS ASSISTED LIVING
IN THE GREATER FARGO MOORHEAD MARKET AREA
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Facility ¹	Capacity	Percent Occupied on the Day Contacted	Type of Room Available	Market Rate	Subsidized	Services/Amenities included in Rent Package	Services/Amenities Available for Purchase From Building
	Year Built			Monthly Fees			
Garden Square of Fairmont 801 Second Avenue North Moorhead, MN 56560	19	94.7% (18/19)	Companion Suite 1 Bedroom 2 Bedroom Private or Shared Full Bathroom No Kitchen	60.0%	40.0%	3 meals per day, Housekeeping, and Scheduled Transportation	Laundry, Linen, and Personal Care
				\$3,036-\$3,242			
Sheyenne Crossings 225 13 th Avenue West West Fargo, ND 58078	24	91.7% (22/24)	Studio (356-515 s.f.)	100.0%	0.0%	3 meals per day, Laundry, Linen, Housekeeping, and Scheduled Transportation	Personal Care
	2007		¾ Bath Kitchenette	\$3,937			
Edgewood Vista of Fargo ² 4420 37 th Avenue South Fargo, ND 58104	33	N/A	Private Semi Private	85.0%	15.0%	3 meals per day, Laundry, Linen, Housekeeping, Scheduled Transportation, and Personal Care	Additional Personal Care
	2007		½ Bathroom No Kitchen	Private:\$3,210 Semi-Private:\$2,945			

¹ All units serving persons with memory loss needs must be licensed as Basic Care in the State of North Dakota.

² Edgewood Vista would not share information. Info has been gathered from the North Dakota Department of Health and Human Services and previous studies.

**PROFILE OF MEMORY LOSS ASSISTED LIVING
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Facility	Capacity	Percent Occupied on the Day Contacted	Type of Room Available	Market Rate	Subsidized	Services/Amenities included in Rent Package	Services/Amenities Available for Purchase From Building
	Year Built			Monthly Fees			
Evergreens of Fargo – Enhanced Care 1401 West Gateway Drive Fargo, ND 58103	15	86.7% (13/15)	Suite (140-200 s.f.) ¾ Bathroom No Kitchen	100.0%	0.0%	3 meals per day, Laundry, Linen, Housekeeping, Scheduled Transportation, and Personal Care	None
				\$4,370-\$4,994			
Touchmark at Harwood Groves – Memory Care 1200 Harwood Drive Fargo, ND 58103	25	100.0% (25/25)	Studio (260-420 s.f.) 1 Bedroom ¾ Bathroom Kitchenette	100.0%	0.0%	3 meals per day, Laundry, Linen, Housekeeping, Scheduled Transportation, and Personal Care	Additional Personal Care
				\$4,300-\$4,625			
Arbor Park Living 2901 Sixth Avenue North Moorhead, MN 56560	15	100.0% (15/15)	Private Shared ½ Bathroom or No Bathroom No Kitchen	50.0%	50.0%	3 meals per day, Laundry, Linen, Housekeeping, Scheduled Transportation, and Personal Care	None
				\$2,200-\$6,000			

**PROFILE OF MEMORY LOSS ASSISTED LIVING
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Facility	Capacity Year Built	Percent Occupied on the Day Contacted	Type of Room Available	Market Rate	Subsidized	Services/Amenities included in Rent Package	Services/Amenities Available for Purchase From Building
				Monthly Fees			
Evergreens of Moorhead 502 Third Avenue South Moorhead, MN 56560	30	86.7% (26/30)	Suite ¾ Bathroom No Kitchen	35.0%	65.0%	3 meals per day, Laundry, Linen, Housekeeping, and Scheduled Transportation	Personal Care
				\$4,200-\$4,800 ¹			
River Point of Moorhead 2401 South 11 th Street Moorhead, MN 56560	16	100.0% (16/16)	Studio (368-394 s.f.)	100.0%	0.0%	3 meals per day, Laundry, Linen, Housekeeping, Scheduled Transportation, and Personal Care	None
	2009		1 Bedroom (500 s.f.) ¾ Bathroom No Kitchen	\$3,895			
TOTAL	177	93.8% (135/144)					

Source: Care Providers of Minnesota, Minnesota Department of Health, Aging Services of Minnesota, and information provided by facility to HP&MR in telephone interviews.

¹ The pricing information was taken from an older study because the manager was out at the Moorhead location.

**PROFILE OF MARKET RATE INDEPENDENT AND CONGREGATE HOUSING
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Facility	Capacity	Percent Occupied on the Day Contacted	Year Built	Type of Room Available	Monthly Fees	Services/Amenities included in Rent Package	Services/Amenities Available for Purchase through building
Good Samaritan Apartments and Cottages 150 County Road 34 Arthur, ND 58006 ¹	9	N/A	N/A	4:1 Bedroom 5:2 Bedroom	N/A	Utilities, Complementary Laundry Facilities	Garage
Casselton Retirement Center – Good Samaritan 612 5 th Street North Casselton, ND 58012 ²	20	N/A	N/A	8:1 Bedroom 12:2 Bedroom	N/A	Noon Meal, Utilities, Complementary Laundry Facilities	Garage
Bethany – Kinder House 101 South University Drive Fargo, ND 58103	35	82.9% (29/35)	1978	7:Efficiency (375,550 s.f.) 8:1 Bedroom (650 s.f.) 20:2 Bedroom (840,850 s.f.)	Efficiency: \$430,\$515,\$520 1 Bedroom: \$805,\$895 2 Bedroom: \$925,\$1,025	Emergency Response System, Complimentary Laundry Facilities, Utilities	Evening Meal, Garage: \$45/Month
Century Estates 3820 25 th Street South Fargo, ND 58103 ³	24	N/A	2000	1 Bedroom (900 s.f.) 2 Bedroom (1,100 s.f.)	1 Bedroom:\$895 2 Bedroom:\$995	Water, Sewer, Trash	None

¹ Good Samaritan does not release information.

² Good Samaritan does not release information.

³ Facility did not return phone calls. Information was taken from a previous report.

**PROFILE OF MARKET RATE INDEPENDENT AND CONGREGATE HOUSING
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Facility	Capacity	Percent Occupied on the Day Contacted	Year Built	Type of Room Available	Monthly Fees	Services/Amenities included in Rent Package	Services/Amenities Available for Purchase through building
Edgewood Vista 4420 37 th Avenue South Fargo, ND 58104 ¹	85 ²	N/A	2007	1 Bedroom 2 Bedroom (744-1,209 s.f.)	\$2,095-\$3,045	Continental Breakfast, Noon Meal, Emergency Response System, Utilities	Laundry, Linen, Housekeeping, Transportation, Personal Care, Garage: \$50/Month
Heritage House 401 Sixth Avenue North Fargo, ND 58102 ³	62	N/A	1989	1 Bedroom 2 Bedroom (627-1,000 s.f.)	1 Bedroom: \$640-\$750 2 Bedroom: \$885-\$915	Emergency Response System, Bi-Monthly Housekeeping, Heat	Underground Garage: \$30/Month
Riverview Place 5300 12 th Street South Fargo, ND 58104	96	87.5% (84/96)	1987	Efficiency 1 Bedroom (550-700 s.f.) 2 Bedroom (650-1,150 s.f.)	\$1,450-\$2,709	Emergency Response System, Coin-Free Laundry, Activities, Scheduled Transportation, Utilities	Meals, Linen, Laundry, Housekeeping, Personal Care, Garage: \$55/Month
Trollwood Village 3105 North Broadway Fargo, ND 58102	189	N/A	1987, 1989, 1994	Efficiency 1 Bedroom 2 Bedroom (312-1,248 s.f.)	\$350-\$1,240	Weekly Housekeeping, Heat, Water, Sewer, Trash, Cable	None

¹ Facility did not return phone calls. Information was taken from a previous report.

² These 85 units are licensed as assisted living; however, residents in these units are independent and can arrange for scheduled services as needed. There is no 24-hour staffing in the building.

³ Facility did not return phone calls. Information was taken from a previous report.

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Facility	Capacity	Percent Occupied on the Day Contacted	Year Built	Type of Room Available	Monthly Fees	Services/Amenities included in Rent Package	Services/Amenities Available for Purchase through building
Touchmark Apartments 1200 Harwood Drive Fargo, ND 58104	75	96.0% (72/75)	1998 2009	1 Bedroom 2 Bedroom (400-1,900 s.f.)	\$1,795-\$4,650	30 breakfasts per month, 30 other meals per month, Emergency Response System, Weekly Housekeeping, Activities, Scheduled Transportation, Utilities	Laundry, Linen, Housekeeping, Transportation, Personal Care
Touchmark Cottages 1200 Harwood Drive Fargo, ND 58104	23	95.7% (22/23)	1998	2 Bedroom 3 Bedroom (1,100-1,800 s.f.) 2 Bathroom	Purchase Price: \$155,000- \$250,000 Monthly Fee: \$2,900-\$3,500 ¹	Emergency Response System, Activities, Scheduled Transportation, Utilities, Attached Garage	Laundry, Linen, Housekeeping, Personal Care
Carriage House Apartments 3412 Village Green Boulevard Moorhead, MN 56560	36	N/A	1984	21:1 Bedroom (508-603 s.f.) 15:2 Bedroom (842, 892 s.f.)	1 Bedroom: \$599-\$699 2 Bedroom: \$849-\$899	Emergency Response System, Activities, Heat, Water, Garage	None

¹ Facility would not share pricing information. This information is from a previous study.

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Facility	Capacity	Percent Occupied on the Day Contacted	Year Built	Type of Room Available	Monthly Fees	Services/Amenities included in Rent Package	Services/Amenities Available for Purchase through building
Farmstead Estates 3433 South 28 th Street Moorhead, MN 56560	48	N/A	2010	2 Bedroom (1,200 s.f.)	\$1,435	Utilities and a Garage	Home Health Care Through Third Party Home Care Agency
Cooperative Living Center 1424 14 th Street East West Fargo, ND 58078	48 (24 rental) (24 condo purchase)	N/A	1985	1 Bedroom (650 s.f.) 2 Bedroom (890 s.f.)	<u>Rental:</u> 1 Bedroom: \$835 2 Bedroom: \$910 <u>Purchase:</u> \$83,000 + <u>Monthly Fee:</u> \$213	Condo: Attached Garage, Heat, Water, Sewer, Trash Rental: Heat, Water, Sewer, Trash	Rental: Garage: \$30/Month
TOTAL	750	90.4%¹ (207/229)					

Source: North Dakota Department of Health, North Dakota Department of Human Services, Aging Services of Minnesota, Care Providers of Minnesota, Minnesota Department of Health, Minnesota Department of Human Services, U.S. Department of Health and Human Services, and information provided by facility to HP&MR in telephone interviews.

¹ Total overall occupancy information only includes those facilities that were willing or able to share occupancy information or were not in an initial fill-up period.