



CAPE COD REGION
*COMPREHENSIVE ECONOMIC
DEVELOPMENT STRATEGY*
CEDs ANNUAL REPORT

SUBMITTED TO:
US DEPARTMENT OF COMMERCE ECONOMIC DEVELOPMENT ADMINISTRATION

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SUBMITTED:
JUNE 2004

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FORWARD

This document is being submitted to the U.S. Economic Development Administration (EDA) as the Annual Update of the Comprehensive Economic Development Strategy (CEDS) Report for the Cape Cod region.

The Economic Development Administration (EDA)

The mission of the Economic Development Administration (EDA), an agency of the U.S. Department of Commerce, is to support the formulation and implementation of economic development programs that create or retain full-time permanent jobs and income for the unemployed and underemployed in areas of economic distress. The EDA supports the efforts of regions and communities to devise and implement economic development programs.

The EDA provides regions with both technical and financial assistance. Investments are focused in areas experiencing or threatened with economic stress. Projects are reviewed according to five “Investment Policy Guidelines”:

1. ***Be market-based and results-driven.*** An investment will capitalize on a region's competitive strengths and will positively move a regional economic indicator measured on EDA's Balanced Scorecard, such as: an increased number of higher-skill, higher-wage jobs; increased tax revenue; or increased private-sector investment.
2. ***Have strong organizational leadership.*** An investment will have strong leadership, relevant project management experience, and a significant commitment of human-resources talent to ensure a project's successful execution.
3. ***Advance productivity, innovation, and entrepreneurship.*** An investment will embrace the principles of entrepreneurship, enhance regional clusters, and leverage and link technology innovators and local universities to the private sector to create the conditions for greater productivity, innovation, and job creation.
4. ***Look beyond the immediate economic horizon, anticipate economic changes, and diversify the local and regional economy.*** An investment will be part of an overarching, long-term comprehensive economic development strategy that enhances a region's success in achieving a rising standard of living by supporting existing industry clusters, developing emerging new clusters, or attracting new regional economic drivers.
5. ***Demonstrate a high degree of commitment by exhibiting:***
 - a. High levels of local-government or nonprofit matching funds and private-sector leverage
 - b. Clear and unified leadership and support by local elected officials
 - c. Strong cooperation between the business sector, relevant regional partners, and local, state, and federal governments

The Comprehensive Economic Development Strategy (CEDs)

Prior to the region or the towns within the region to receiving funding from the EDA, however, a region must have completed a Comprehensive Economic Development Strategy (CEDs). The CEDs is both a document and a process — a process of analysis, planning, and action to promote new economic development activity and improve community facilities and services.

The CEDs Planning Process: To lead the CEDs planning process, the regional planning authority is required to appoint or designate a “Strategy Committee.” The Committee is responsible for convening the planning process and overseeing implementation of the plan. The Committee should be representative of the economic development community within the region including business, industry, government, service and non-profit organizations, minority populations, and training and educational entities.

The CEDs Document: There are two types of CEDs reports: the five-year update and the interim annual reports. The detailed five-year CEDs report includes the following:

- 1) The Planning Process: A description of the CEDs Regional Planning Process
- 2) The Analysis: A comprehensive review of the region’s economic development challenges and opportunities
- 3) The Vision: An outline of the region’s economic development vision, goals & objectives
- 4) The Action Plan: A description of the major economic development initiatives throughout the region
- 5) The Evaluation: A plan for measuring the quality of economic development activities in the region and the region’s progress in meeting specific priorities and the overall CEDs vision and goals.

During the interim years, the annual reports track progress toward the economic development goals of the region and document any changes in regional conditions or priorities. Annual reports include the following:

- 1) Adjustment to the CEDs: Description of any changes in the CEDs planning process, structure, or strategy
- 2) Activities Evaluation: Description of the year’s activities, including quantitative and qualitative measures of their success, and an outcome evaluation of each activity.
- 3) Goals Evaluation: Analysis of overall progress toward meeting regional goals using quantitative and qualitative measures
- 4) Implementation Schedule: Timeline identifying priority activities for the upcoming year and when they will be implemented

Also included in the CEDs is a list of “Priority Projects” that have been identified by the region as projects that could qualify for funding by EDA.

EXECUTIVE SUMMARY

The following report is the second annual update of the Barnstable County Comprehensive Economic Development Strategy (CEDS) five-year plan completed in 2002. The annual report is organized in much the same manner as the five-year plan but places a greater focus on the action plan for the coming year and the evaluation of activities over the past year. This iteration of the CEDS report for the Cape Cod region has been significantly condensed relative to previous versions and is divided into five main sections:

1. The CEDS Planning Process: This section summarizes the CEDS planning structure for the Cape Cod region. Barnstable County includes the 15 towns that make up Cape Cod, a unique glacial spit of land jutting off the southeast coast of Massachusetts. The Cape Cod Commission, the regional planning and regulatory authority, leads the Barnstable County CEDS planning process for the County. The Cape Cod Economic Development Council (EDC) acts as an advisory committee to the Commission in the CEDS process. The planning process is designed, through the establishment of the CEDS Contributors Group, to include the direct input of regional organizations involved in economic development and each of the individual municipalities. The Governor's Regional Competitiveness Council, a state-level economic development planning process, has complemented the CEDS process in recent years. The legal and philosophical basis of the CEDS is established in the Cape Cod Commission Act, passed by the Massachusetts Legislature in 1990, and the Cape Cod Regional Policy Plan.
2. The CEDS Analysis: This section of the annual report highlights trends that make the Cape Cod region unique from an economic development perspective. Since the mid-twentieth century Cape Cod has been known as a tourist and retirement destination. Residential and commercial development has occurred at high rates over a limited period of time within a limited, and environmentally sensitive, geographic area of 39.5 square miles. A significantly larger proportion of businesses on Cape Cod serve the local market relative to the nation as a whole. Strong industry clusters include hospitality and tourism, education, transportation, real estate, and some traditional activities such as fishing and furniture. A significant percentage of employment is sole proprietorships.

The population of Barnstable County has grown three times as fast as the state and nearly half again as fast as the nation's since 1980. A higher proportion of the population living on Cape Cod is of retirement age, and more and more of the homes on Cape Cod are occupied by year-round residents. The number of homes on Cape Cod has doubled since 1970, and building continues at a higher rate than in the rest of the state. Meanwhile, the cost of housing, while consistent with the state, is significantly higher than in the rest of the nation. While Median household income continues to increase and poverty to decline in the county, housing affordability measures indicate a broadening bifurcation of the population between those with a great deal of wealth and those among the lower and middle classes struggling to maintain their standard of living on Cape Cod. Variations

between towns and income groups, however, are apparent in housing costs and income statistics.

3. The CEDS Vision: This section reiterates the economic development vision, goals, and objectives identified through the five-year CEDS planning process. A few changes have been made for the clarification purposes. Any major changes will be made during the next five-year plan update in 2007.
4. The CEDS Action Plan: The CEDS Action Plan delineates the economic development activities for the coming year. The plan is organized by CEDS goals and includes an implementation schedule for each activity. It may be helpful to note that the Cape Cod CEDS is focused on activities that are generally ongoing rather than specific planning or infrastructure projects in need of funding support from EDA. Nevertheless, several priority projects have been identified by CEDS Contributors as essential to local and regional economic development that warrant further consideration within the CEDS process. The projects included in this report are only a few of what we hope to develop as the region moves this process forward over the next three years.
5. The CEDS Evaluation: This sections outlines the evaluation methodology developed by the CEDS team over the past several years and summarizes the results from this year's evaluation of our ongoing activities. In terms of overall performance, most activities were described as on-course or making substantial progress. Only a few activities were on hold, primarily due to staff changes and organizational transition. Several new activities were added to the mix – the EntreCenter to support entrepreneurship; The Passport to the Arts to support the arts and culture cluster; and the Sustainability Outreach Program to help integrate the concepts of sustainability in the public and private sectors. While only one program is officially being revised, a large number of activities will be changed and generally enhanced over the coming year. A few programs will not be able to continue or are pending due to funding concerns. Evaluation reports for each activity are included in the appendices.

THE CEDS PLANNING PROCESS

The Cape Cod Region

The Cape Cod region consists of Barnstable County, which in turn consists of 15 incorporated towns:

- Barnstable
- Bourne
- Brewster
- Chatham
- Dennis
- Eastham
- Falmouth
- Harwich
- Mashpee
- Orleans
- Provincetown
- Sandwich
- Truro
- Wellfleet
- Yarmouth

The region completed its most recent five-year update of the Comprehensive Economic Development Strategy (CEDS) in June 2002. This plan was approved by the EDA following the submission of an evaluation addendum in November 2002.

The CEDS Planning Structure

1. The CEDS Strategy Committee: The Cape Cod Commission serves as the CEDS Strategy Committee for Cape Cod/Barnstable County region. The Commission is made up of 19 members representing each town on Cape Cod, the County of Barnstable, the Governor, and both the Native American and minority communities on Cape Cod. The Commission was established in 1990 as the regional planning and regulatory authority for the Cape with a special charge to promote sustainable development. The Cape Cod Commission Act outlines the Commission's role as follows:

The purpose of the Cape Cod Commission shall be to further: the conservation and preservation of natural undeveloped areas, wildlife, flora and habitats for endangered species; the preservation of coastal resources including aquaculture; the protection of groundwater, surface water and ocean water quality; as well as the other natural resources of Cape Cod; balanced economic growth; the provision of adequate capital facilities, including transportation, water supply, and solid, sanitary

The Cape Cod Commission Organizational Structure

Commission Members (19)

- 15 Members representing each town on Cape Cod
- 1 Member representing the Governor
- 1 Member representing the County Commissioners
- 1 Member representing Native Americans
- 1 Member representing minority populations

Staff (~40)

- Executive Director
- Deputy Director/Chief Planner
- Chief Regulatory Officer
- Economic Development Officer (CEDS Coordinator)
- Affordable Housing Specialist
- Marine Resources Specialist
- Water Resources Program Manager
- Transportation Program Manager
- Natural Resources & Land Protection Specialist
- Others

and hazardous waste disposal facilities; the coordination of the provision of adequate capital facilities with the achievement of other goals; the development of adequate supply of fair affordable housing; and the preservation of historical, cultural, archeological, architectural, and recreational values.

In fulfilling this mission, the Cape Cod Commission may act to regulate developments that are considered to have regional impact, oversee land-use planning on Cape Cod, and recommend the designation of areas as Districts of Critical Planning Concern (DCPC). The Commission is supported by a staff of full-time planners and specialists in the areas of water resources, transportation, housing, natural resources, coastal and marine resources, and economic development.

2. The CEDS Advisory Committee: The Cape Cod Economic Development Council (EDC) serves as an advisory committee in the CEDS planning process. The EDC is a 14 member advisory council to Barnstable County. The mission of the EDC is to improve the quality of life of the residents of Barnstable County by fostering a stronger year-round economy. To focus their efforts, the EDC has adopted a four-pronged strategy:
 - 1) Create a more educated and skilled workforce;
 - 2) Expand artistic/cultural and intellectual capital;
 - 3) Promote healthcare, technology, environmental science, and marine/coastal industry clusters; and
 - 4) Identify “choke points” involving physical infrastructure that limit options for economic development.

The EDC administers the Cape and Islands License Plate Grant Program offering approximately \$400,000 in grants annually. The program was established in 1997-1998 to address the need for an additional regional funding source for non-profit and town-based projects that strengthen the Cape's year-round economy.

The EDC has structured the program to include a small grant and a large grant option. The small grants focus on providing support for model programs in arts and culture, education, technology, and environmental science. The large grants are designed to support both physical infrastructure and workforce development.

The Cape Cod Economic Development Council
Organizational Structure

Council Members (14)

- 11 private-sector members representing important areas of the Cape's economy such as finance, media, healthcare, transportation, and housing
- 3 governmental members representing:
 1. Barnstable County Commissioners
 2. Barnstable County Assembly of Delegates
 3. Cape Cod Commission

Staff (1)

- Executive Director

3. The CEDS Contributors Group: The CEDS Contributors group consists of regional organizations associated with issues of economic development as well as municipal representatives from each of the Cape's towns. (See Appendix A for a brief description of each organization currently participating in the CEDS Contributor Group.)
4. The Governor's Regional Competitiveness Council (RCC): In the spring of 2003, the Governor established Regional Competitiveness Councils throughout the state to bring key regional leaders together to identify regional priorities for economic development by looking at each region's unique strengths and weaknesses. The process began with a detailed data evaluation component, including having an Industry Cluster Analysis completed for each region by Professor Michael Porter's Institute of Strategy and Competitiveness at the Harvard Business School. The results of this research for the Cape & Islands region are summarized in the analysis section of this report. In December 2003, the Cape & Islands Regional Competitiveness Council prepared a summary of its findings and recommendations to the Governor. Since that time the RCC has met to develop plans for implementing the specific recommendation identified. (Materials on the Cape & Islands Regional Competitiveness Council can be found in Appendix B.)

The Legal and Philosophical Basis for the CEDS

1. The Cape Cod Commission Act: The Cape Cod Commission was established in 1990 through an Act of the Massachusetts State Legislature and a countywide referendum. Among the purposes stated in the Cape Cod Commission Act are the promotion of "balanced economic growth" in a way that meets the economic development goals of Cape Cod without sacrificing its natural resources, beauty, and heritage.
2. The Regional Policy Plan: The Cape Cod Commission Act calls for the development of a Regional Policy Plan (RPP) to outline a coherent set of planning policies and objectives to guide development on Cape Cod and to protect its resources. The Act requires that the Regional Policy Plan identify the Cape's critical resources and management needs, establish a growth policy for the Cape, set regional goals, and develop a policy for coordinating local, regional and other planning activities. The RPP establishes a basis for economic development planning on Cape Cod, envisioning a synergy between economic development and the protection and preservation of the Cape's resources.

The RPP outlines five core planning principles:

1. **The rate of growth** for any town should not exceed the ability of that town to provide the services necessary to support that growth.
2. **The pattern of growth** should focus on redevelopment and "infill" (intensification of existing development) to revitalize existing Growth/Activity Centers and Growth Incentive Zones, enhance community character, and protect remaining open space from sprawl development.

3. **The location of growth** should not damage the natural environment or the character of the Cape's communities.
4. **The amount of growth** should be based on regional and local capacity limits, especially in light of the type, pattern, and location of expected growth, and steps should be taken to ensure that the amount of future growth is sustainable.
5. **The type of growth**, particularly new development, should respect the integrity of the Cape's scenic, historic, and architectural character and its compact village centers.

In terms of economic development the Regional Policy Plan outlines three overarching goals focusing on the nature and location of particularly commercial development. The goals are as follows:

ED Goal 1: Development Compatibility

To encourage businesses which are compatible with Cape Cod's environmental, cultural, and economic strengths in order to ensure balanced economic development

ED Goal 2: Development Location

To locate development so as to preserve the Cape's environment and cultural heritage, minimize adverse impacts, and enhance the quality of life

ED Goal 3: Employment Diversity

To encourage the creation and diversification of year-round employment opportunities

In addition to establishing these economic development goals, the RPP requires specific economic data must be submitted to the Commission for any developments considered to have a regional impact. The information submitted is used, in accordance with the RPP, to identify both the positive and negative impacts of the project on the region's economy. (See Appendix C for the complete economic development section of the RPP.)

THE ANALYSIS: CAPE COD'S ECONOMY

Background: Capacity & Sustainability

In 2000, the Cape Cod Commission, working in partnership with the Massachusetts Executive Office of Environmental Affairs, conducted a “build-out” analysis for all 15 Cape towns. This analysis examined local zoning and other growth-related regulations currently in place, and made projections about future growth based on the amount of remaining developable land. The analysis revealed that, with no additional growth management or land-protection efforts, the Cape could add 37,000 houses and at least 50,000 people at build-out. Moreover, at current growth rates, build-out will likely be reached within 30 years—well within the lifetime of many of the people reading this passage.

As of 2000, about 40% (102,099 acres) of the land on the Cape is developed. Another 29% (74,629 acres) is permanently protected. That leaves about 31%, or 76,973 acres—approximately one-third of the remaining land—available for development. While not all of this land can be built on due to the presence of wetlands, unsuitable topography, or other constraints, it is still subject to environmental impacts and habitat fragmentation from the development that could occur. During the 1990s, more than 15,000 acres of open land was converted to development. During the same period, the number of houses increased by approximately 17,000 and the population increased by roughly 35,000. The Cape is now home to nearly 230,000 year-round residents and some 150,000 homes.

In the 1995 Cape Cod Residents' Survey prepared for the Cape Cod Commission, respondents indicated that the following factors were very important in their decision to live on Cape Cod: 60% cited the air and water quality, 60% cited safety from crime, 55% cited proximity to the coast, 52% cited the rural character of the Cape, and 48% cited the small-town life style. Respondents ranked traffic congestion, population growth, groundwater pollution, pollution of coastal waters, loss of open space, and tax increases as the most serious problems facing the Cape in the next five years. Fifty-four percent (54%) of the respondents indicated that population growth in their town had worsened the quality of life during the previous 25 years.

Updates & Changes

The analysis section has been reorganized to highlight trends that make the Cape Cod Region unique from an economic development perspective. This change is intended to help the CEDs planning team focus their efforts in reviewing and implementing the plan. Over the next several years, we plan to develop this section more fully, incorporating further data and indicators that are identified as important along the way. At this point, the section focuses mostly on the data collected in US Census 2000 and will therefore be consistent with the 2003 Annual Report. Unlike that report, however, we have decided to include more data in the form of tables and, as mentioned above, limit discussion to those trends unique to the region as illustrated by the data. Finally, the section concludes with new information provided through the Governor's Regional Competitiveness Council process on industry clusters.

Data Trends

POPULATION

- **Trend:** Barnstable County’s population is growing more than three times as fast as Massachusetts’s and nearly half again as fast as the nation’s.

Total Population						
Location	1980-1990			1990-2000		
	1990	# Change	% Change	2000	# Change	% Change
Barnstable County	186,605	38,680	26.2%	222,230	35,625	19.1%
Massachusetts	6,016,425	279,388	4.9%	6,349,097	332,672	5.5%
United States	248,709,873	22,164,068	9.8%	281,421,906	32,712,033	13.2%

Source: US Census, 1980, 1990, 2000, Census Bureau, US Department of Commerce

- **Trend:** Retirement-age residents comprise a higher proportion of the population on Cape Cod than in Massachusetts and the US as a whole.

Population 65 years & older				
Location	1990	2000	% Change	% of Total Population
Barnstable County	41,135	51,265	24.6%	23.1%
Massachusetts	819,284	860,162	5.0%	13.5%
United States	31,241,831	34,658,190	12.0%	12.3%

Source: US Census 1990, 2000, Census Bureau, US Department of Commerce

Town Population by Age Groups						
Town	1990		2000		1990-2000	
	% of Total Population		% of Total Population		% Change	
	Working Age	% Over 65	Working Age	% Over 65	Working Age	Over 65
Barnstable	58.5%	20.2%	58.0%	20.1%	15.8%	15.9%
Bourne	60.4%	14.9%	60.5%	17.6%	16.8%	38.3%
Brewster	55.2%	22.2%	52.9%	26.2%	14.6%	41.2%
Chatham	51.0%	34.1%	52.4%	34.3%	3.6%	1.4%
Dennis	52.5%	28.8%	54.7%	28.4%	20.0%	13.9%
Eastham	56.0%	23.7%	56.3%	26.0%	22.9%	34.4%
Falmouth	59.0%	18.9%	56.8%	22.5%	12.6%	39.2%
Harwich	52.5%	28.6%	52.1%	29.6%	19.8%	24.9%
Mashpee	61.0%	14.5%	56.7%	18.6%	52.7%	110.6%
Orleans	53.9%	31.2%	50.2%	36.0%	1.2%	25.6%
Provincetown	69.0%	18.0%	74.3%	17.8%	3.7%	-5.0%
Sandwich	58.7%	14.1%	57.9%	13.7%	28.4%	26.2%
Truro	63.2%	20.4%	65.6%	17.0%	37.7%	10.3%
Wellfleet	59.5%	20.0%	60.5%	21.7%	12.1%	19.9%
Yarmouth	51.8%	30.6%	52.7%	30.1%	19.3%	15.1%
Barnstable Co.	56.9%	22.0%	56.5%	23.1%	18.2%	24.6%
Massachusetts	63.9%	13.6%	62.8%	13.5%	3.8%	5.0%

Source: U.S. Census 1990, 2000

Note: Working Age is defined as being between 18 and 64 years of age.

HOUSING

- **Trend:** The number of housing units on the Cape has more than doubled since 1970 and continues to grow at a higher rate than the state as a whole.

Housing Units								
Location	1970	1980		1990		2000		1970-2000
	Total	Total	% Change	Total	% Change	Total	% Change	% Change
Barnstable Co.	65,676	99,946	52.2%	135,192	35.3%	147,083	8.8%	124.0%
Dukes Co.	5,510	8,819	60.1%	11,604	31.6%	14,836	27.9%	169.3%
Nantucket Co.	3,063	4,784	56.2%	7,021	46.8%	9,210	31.2%	200.7%
Massachusetts	1,890,400	2,208,146	16.8%	2,472,711	12.0%	2,621,989	6.0%	38.7%

Source: US Census 2000, Census Bureau, US Department of Commerce

Housing Units					
Town	1990	2000	Unit Change	% Change	State Rank
Barnstable	23,370	25,018	1,648	7.1%	206
Bourne	8,999	9,648	649	7.2%	204
Brewster	6,367	7,339	972	15.3%	82
Chatham	6,301	6,743	442	7.0%	208
Dennis	14,502	14,105	-397	-2.7%	337
Eastham	4,863	5,535	672	13.8%	100
Falmouth	18,168	20,055	1,887	10.4%	140
Harwich	8,325	9,450	1,125	13.5%	104
Mashpee	7,002	8,325	1,323	18.9%	56
Orleans	4,593	5,073	480	10.5%	137
Provincetown	3,802	3,890	88	2.3%	293
Sandwich	7,236	8,748	1,512	20.9%	42
Truro	2,175	2,551	376	17.5%	66
Wellfleet	3,576	3,998	422	11.7%	120
Yarmouth	15,913	16,605	692	4.3%	257

Source: US Census 2000, Census Bureau, US Department of Commerce

- **Trend:** Year-round residents occupied more of the homes on Cape Cod in 2000 than in 1990.

Housing Units by Type of Occupancy							
Location	1990			2000			1990-2000
	Total Units	% Year-Round	% Vacant/Seasonal	Total Units	% Year-Round	% Vacant/Seasonal	% Change Year-Round
Barnstable Co.	135,192	57.4%	42.6%	147,083	64.5%	35.5%	22%
Massachusetts	2,472,711	90.9%	9.1%	2,621,989	93.2%	6.8%	9%

Source: US Census 2000, Census Bureau, US Department of Commerce

- **Trend:** Median housing value is lower on Cape Cod than in Massachusetts as a whole, both however, are significantly higher than the US.

Median Housing Value				
Value	Owner-Occupied Households			
	Barnstable County		Massachusetts	
	2000	May 2004	2000	-
Median Value	\$178,800	\$333,000	\$185,700	-
Valued \$100-\$150K	27.5%	-	26.8%	-
Valued < \$200K	59.3%	-	55.9%	-

Source: U.S. Census 2000; Banker & Tradesman, May 2004

- **Trend:** Monthly housing costs as a percentage of total household income on Cape Cod was consistent with state and national figures, although the Cape exceeded the Massachusetts share at the two extremes; housing cost below 15% of total household income and housing costs above 35% of household income.

Housing Costs				
Housing Costs as % of Household Income	Owner-Occupied Households			
	Barnstable County		Massachusetts	
	Number	Share of Total	Number	Share of Total
Below 15%	24,305	36.3%	397,028	33.4%
15%-19.9%	10,757	16.1%	214,224	18.0%
20%-24.9%	8,832	13.2%	178,705	15.0%
25%-29.9%	6,233	9.3%	121,955	10.3%
30%-34.9%	4,173	6.2%	76,471	6.4%
35%+	12,248	18.3%	192,836	16.2%
Not Computed	473	0.7%	6,652	0.6%
TOTAL	67,021	100.0%	1,187,871	100.0%

Source: U.S. Census 2000

- **Trend:** Median housing values and the cost of housing as a percentage of household income varies significantly from town to town on Cape Cod.

Housing Value & Housing Cost			
Location	Median Value of Owner Occupied Housing	Share of Total Housing Costing 35% or more of Household Income	
		Owner Occupied Housing	Rental Housing
Barnstable	\$171,500	19.9%	34.0%
Bourne	166,100	20.6%	26.9%
Brewster	198,500	17.3%	26.4%
Chatham	273,900	14.3%	26.7%
Dennis	175,100	17.6%	31.8%
Eastham	192,300	15.4%	26.6%
Falmouth	181,500	16.2%	32.2%

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Harwich	183,000	20.1%	23.3%
Mashpee	168,900	18.9%	31.5%
Orleans	300,700	17.0%	22.0%
Provincetown	323,600	28.4%	40.7%
Sandwich	178,000	18.9%	22.7%
Truro	286,500	23.9%	19.8%
Wellfleet	242,700	21.3%	24.3%
Yarmouth	151,200	16.5%	32.3%
Barnstable Co.	\$178,800	18.3%	30.5%
Massachusetts	\$185,700	16.2%	28.6%

Source: U.S. Census 2000

INCOME

Trend: Barnstable County led the 14 Massachusetts counties both in rate of median household income growth as well as decline in percent of families with income below poverty level.

Trends in Median Household Income					
Location	Median Income 1989	Median Income 1999	Numerical Change	1989-1999 Percent Change	Rank in State by % Change
Barnstable Co.	31,766	45,933	14,167	44.6%	1
Massachusetts	36,952	50,502	13,550	36.7%	

Source: U.S. Census 1990, 2000

Poverty Rates								
Area Name	Families below poverty level in 1990	Families below poverty level in 2000	Numerical change of families below poverty level, 1990 to 2000	Percent of families below poverty level in 1990	Percent of families below poverty level in 2000	Rank of Percent of families below poverty level in 2000	Families below poverty level, percent change 1990-2000	Families below poverty level, rank of percent change 1990-2000
Barnstable Co.	3,030	2,833	(197)	5.8%	4.6%	11 th of 14	-1.2%	14 th of 14
Massachusetts	102,748	105,619	2,871	6.7%	6.7%		-0.1%	

Source: U.S. Census 1990, 2000

➤ **Trend:** With nearly one-fourth of its residents age 65 or over, Barnstable County median household and per capita income levels remain below statewide levels, but median household income in two Cape towns (Sandwich and Mashpee) and per capita income in five towns (Orleans, Chatham, Falmouth, Sandwich and Provincetown) exceed state levels.

1999 Median Household Income & Per Capita Income		
Location	Median household income (dollars)	Per capita income (dollars)
Barnstable	\$ 46,811	\$ 25,554
Bourne	\$ 45,113	\$ 22,092
Brewster	\$ 49,276	\$ 24,638

CAPE COD REGION COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS)
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Chatham	\$ 45,519	\$ 28,594
Dennis	\$ 41,598	\$ 25,428
Eastham	\$ 42,618	\$ 24,642
Falmouth	\$ 48,191	\$ 27,548
Harwich	\$ 41,552	\$ 23,063
Mashpee	\$ 50,871	\$ 25,215
Orleans	\$ 42,594	\$ 29,553
Provincetown	\$ 32,716	\$ 26,109
Sandwich	\$ 61,250	\$ 26,895
Truro	\$ 42,981	\$ 22,608
Wellfleet	\$ 43,558	\$ 25,712
Yarmouth	\$ 39,808	\$ 22,731
Barnstable Co.	\$ 45,933	\$ 25,318
Massachusetts	\$ 50,502	\$ 25,952

Source: U.S. Census 2000

- **Trend:** Relative to the state and the US, a larger portion of income on Cape Cod is from investment & government transfer payments than earned income.

Sources of Personal Income - 2002				
Location	Total	Earned	Dividends, Interest, & Rent	Government Transfer Payments
Barnstable Co.	\$9.0 Billion	57.2%	27.0%	15.8%
Massachusetts	\$251.0 Billion	69.1%	17.5%	13.4%

Source: Bureau of Economic Analysis, US Department of Commerce

EMPLOYMENT

- **Trend:** Remarkably, between 1990 and 2000 job creation outstripped population and housing growth by a significant margin.

Total Employment						
Location	1980-1990			1990-2000		
	1990	# Change	% Change	2000	# Change	% Change
Barnstable Co.	70,333	18,902	36.8%	88,583	18,250	25.9%
Massachusetts	2,929,500	333,800	12.9%	3,275,100	345,600	2.7%

Source: ES202 Data Series, Massachusetts Division of Unemployment Assistance; Bureau of Labor Statistics, US Department of Labor

Note: Figures do not capture the above-average number of self-employed workers on Cape Cod.

Industry Clusters

Over the past year the Governor's Regional Competitiveness Council for the Cape and Islands Region has been working to identify the elements that make this region competitive, those elements that undermine the region's competitive position, and how the public sector at the state,

county, and town levels may influence these competitiveness factors. An early step in this analysis was to employ Professor Michael E. Porter, from the Institute for Strategy and Competitiveness at Harvard Business School, to identify the industry clusters on the Cape & Islands and assess the competitive position of these clusters. Professor Porter’s findings, taken directly from his presentation to the Cape and Islands Regional Competitiveness Council on September 30, 2003, are quoted below:

1. Cape & Islands Economic Performance Trends

- The region has traditionally low wages but registered wage growth at 5.95% annually over the last five years, among the leading regions in the state and significantly above the U.S. average.
- The region led the state in employment growth at 3.1% annually over the last five years.
- However, 81% of the region’s job growth occurred in local clusters, especially in real estate development.
- The region’s growth of establishments was among the lowest of all Massachusetts regions.
- The patenting rate of 4.5 patents per 10,000 employees in 2001 significantly lags the U.S. average and the leading Massachusetts regions.

2. Cape & Islands Economic Composition

- The region has, with 18.3%, the lowest share of traded employment of all Massachusetts regions.

Employment 1990-2001						
Location	Traded Clusters		Local Clusters		Natural Resource Driven Industries	
	Share	Growth	Share	Growth	Share	Growth
United States	31.6%	1.7%	67.6%	2.8%	0.8%	-1%
Cape & Islands	18.3%		81.4%		0.3%	

- The region is dominated by its strong position in hospitality and tourism.
- Other clusters with significant positions include education & knowledge creation, transportation & logistics, and furniture (in furniture, cluster wages are above the state and national average; this contrasts with cluster wages otherwise lower than the Massachusetts average).
- The region’s position in most of its strong clusters is deteriorating, especially in furniture.
- The region is strengthening its position in some of the smaller clusters, such as Plastics and Distribution Services.
- Within local clusters, real estate development has added the most significant number of jobs between 1997 and 2001.
- A significantly higher share of employment in the region is in sole proprietorships than in other regions in Massachusetts.

3. Cape & Islands Business Environment

- Overall the region is seen as lagging many regions in Massachusetts as a location for doing business.
- Specific advantages are the quality of life and basic education.
- Critical disadvantages are the cost of doing business and of living, the quality of the transportation infrastructure, and the quality of specialized suppliers.
- The satisfaction with educational institutions is low compared to other regions in the state.
- Cost of living, transportation, and access to skilled employees are seen as the most important challenges for the region, with housing availability already a critical barrier to growth.

THE CEDs VISION

Background

The CEDs Vision for economic development on Cape Cod is derived from the larger vision outlined in The Regional Policy Plan (RPP). The RPP is an expression of the shared aspirations of Cape Codders for the future. It is also a commitment by Barnstable County, in exercising its authority under the Cape Cod Commission Act, to serve as steward and trustee of the natural and cultural resources of Cape Cod and to work toward the development of a sustainable regional economy.

The RPP recognizes the Cape as a fragile and beautiful place: a land of pine barren, kettle pond and sand dune; piping plover and gray seal; beach, salt marsh, and bay; village lane and stone wall. It is a plan that seeks to protect habitat, in the awareness that Cape Cod is home to endangered species of global significance. It is a Plan to conserve a cultural landscape shaped slowly over 10,000 years of human habitation.

The RPP also recognizes that Cape Cod is home to nearly 230,000 year-round residents, provider of jobs for over 90,000, and the destination for millions of visitors. It is a Plan about creating the conditions for good jobs and decent, affordable housing. And it is necessarily a plan to address problems such as traffic jams, waste disposal, and contaminated groundwater, and to deal with a range of land uses and forms of development from rural to urban.

Updates & Changes

Since the 2003 Annual Report, one new goal and one new objective have been added to the region's set of priorities. The new goal, number 3, was added to separate out target industry initiatives and those initiatives directly associated with environmental and social linkages. Several objectives have also been moved as they fit more logically under a different goal than originally assigned. The additions and changes are highlighted in italics on the table below, with the numbers from the 2003 report following each objective to assist in comparison. None of the changes results in or reflects a significant shift in direction or philosophy.

The CEDs Vision

VISION STATEMENT

To implement a balanced, sustainable economic development strategy capable of absorbing the effects of seasonal fluctuations in economic activity, which integrates economic and environmental concerns.

The CEDS Goals & Objectives

GOAL	OBJECTIVE
<p>Goal 1: A strong CEDS Planning Process</p>	Increase awareness of economic development issues in the region (1d & 1f)
	Increase participation in CEDS Planning Process (1d & 1f)
	Strengthen coordination among economic development organizations (1c & 1e)
	Increase distribution of CEDS Report including electronic distribution (1a & 1b)
	<i>Analyze the Cape Cod regional economy regularly to inform the CEDS Process (3a)</i>
	<i>Understand the economic impact of the retirement community on the region (3g)</i>
<p>Goal 2: A skilled workforce and outstanding training & educational opportunities</p>	Increase the technical competence of the workforce (2a)
	Promote educational partnerships and new approaches to learning that benefit K-12 students (2b)
	Support strategic planning efforts in workforce training and education (2c)
	<i>Continue to expand opportunities for higher education and life-long learning</i>
<p>Goal 3: A vibrant economy built on strong traditional and emerging economic clusters</p>	<i>Support the hospitality and leisure cluster by promoting value-added tourism (3f)</i>
	<i>Support the arts and culture cluster through training and creative marketing strategies</i>
	<i>Support the information and related technology cluster (3h)</i>
	<i>Support the micro/small business and entrepreneurship cluster (3i)</i>
	<i>Support the marine science and technology cluster (3j)</i>
	<i>Support the energy efficiency, alternative energy cluster and programs (4e)</i>

GOAL	OBJECTIVE
	<i>Support the education cluster by attracting students from outside the region (2e)</i>
Goal 4: An economy that benefits all residents and preserves a healthy natural environment <i>(formerly Goal 3)</i>	Direct development to regional growth centers (3b)
	Improve wastewater infrastructure (3c)
	Improve access to child and elder care (3d)
	Support efforts to make housing affordable (3e)
Goal 5: An integrated transportation and communications infrastructure in keeping with the character of Cape Cod <i>(formerly Goal 4)</i>	Identify infrastructure gaps (4a)
	Develop inter-modal transportation links (4b)
	Encourage use of auto alternatives (4c)
	Encourage affordable housing where transportation alternatives exist (4d)
Goal 6: A top notch, affordable health care system <i>(formerly Goal 5)</i>	<i>Provide training for health services workers (2a)</i>
	Support the development of higher quality services and facilities (5a)
	Support efforts to make health care affordable (5b)

THE CEDDS ACTION PLAN

Background

In the past, the CEDDS Action Plan has included a few specific tasks and then just broad categories of activities that were part of the on going CEDDS process. This Action Plan is focused instead on actual activities, events, or projects that will take precedence in the year to come.

The Purpose of the CEDDS Action Plan

The purpose of the CEDDS Action Plan is to identify which projects and activities should be undertaken over the next year. The action plan should reflect the Goals and Objectives of the CEDDS outlined in the previous section titled the CEDDS Vision.

The Structure of the CEDDS Action Plan

The CEDDS Action Plan is divided in two parts; the first focuses on ongoing economic development activities in the region, and the second, on priority projects that have been identified as potential recipients of federal funding. An implementation chart illustrating when the actions outlined are to be accomplished has also been incorporated into each part of the Action Plan.

Updating the CEDDS Action Plan

Each CEDDS Contributor reported their plans for next year as part of the CEDDS activities evaluation process. This detailed information by activity can be found in Appendix D. The following CEDDS Action Plan for July 2004 – June 2005 reflects the work priorities of the CEDDS Contributors Group but focuses primarily on new activities and activities lead by the Cape Cod Commission.

Program Changes to the CEDDS Action Plan

The most significant program change reflected in this year's Action Plan is the removal of the Regional Infrastructure and Facilities Plan (RIF). The successful efforts of the Barnstable County Wastewater Implementation Committee, the Cape Cod Transit Task Force, the pre-disaster mitigation planning efforts, and the planning that Cape municipalities will undertake as part of the Growth Incentive Zone Program have together reduced the need for the RIF planning process. As a result the project has been suspended.

ONGOING ACTIVITIES
JULY 2004 – JUNE 2005 ACTION PLAN

Goal 1: A strong CEDS Planning Process	
Objectives	Increase awareness of economic development issues in the region
	Increase participation in CEDS Planning Process
	Strengthen coordination among economic development organizations
	Increase distribution of CEDS Report including electronic distribution
	Analyze the Cape Cod regional economy regularly to inform the CEDS Process
	Understand the economic impact of the retirement community on the region

1. Distribute CEDS annual report to economic development agencies, towns, and public libraries. (Lead: Cape Cod Commission)
2. Convene a series of CEDS planning meetings of regional and municipal economic development organizations to develop a hierarchy of investment needs. (Lead: Cape Cod Commission)
3. Prepare a public participation plan for the 2005 CEDS Annual Report and the five-year update in 2007. (Lead: Cape Cod Commission)
4. Inform and update policy makers and the public on economic development activities online, through the Commission’s newsletter, at meetings, and through the press. (Lead: Cape Cod Commission)
5. Publish demographic and economic data as “Cape Trends Updates” once every two months in the Cape Cod Commission newsletter. (Lead: Cape Cod Commission)
6. Maintain, update, and improve the Cape Cod Commission’s economic development and data webspace. (Lead: Cape Cod Commission)
7. Continue working with the Sustainability Indicators Council to develop the concepts of sustainable development on Cape Cod and indicators that will assist in the pursuit of sustainable development. (Lead: Cape Cod Center for Sustainability)
8. Continue to convene the Economic Development Professionals Group around pertinent economic development issues being confronted in the region. (Lead: Cape Cod Economic Development Council)

Activity Implementation Plan	Month (beginning with July 2004)											
	J	A	S	O	N	D	J	F	M	A	M	J
CEDS Distribution	X											
CEDS Regional Meetings			X					X				
CEDS Public Participation Plan	X	X								X	X	
ED Article/Speaking Series				X	X	X		X	X	X		
<i>Cape Trends Updates</i>	X		X		X		X		X		X	

Upgrade CCC Econ. Development Website	X	X	X									
Sustainability Outreach and Indicators (SIC)	X	X	X	X	X	X	X	X	X	X	X	X
Economic Development Professionals Group	X		X		X		X		X		X	

Goal 2: A skilled workforce and outstanding training and educational opportunities	
Objectives	Increase the technical competence of the workforce
	Promote educational partnerships and new approaches to learning that benefit K-12 students
	Support strategic planning efforts in workforce training and education
	Continue to expand opportunities for higher education and life-long learning

1. Continue to support workforce development programs through large or small grants. (Lead: Cape Cod Economic Development Council)
2. Continue to implement the *Workforce Development Policy Blueprint*. (Lead: Cape & Islands Workforce Investment Board)
3. Continue to provide technical certificate programs, associates degrees, and specialized workforce training programs including those offered through the Workforce Resource Center (WERC). (Lead: Cape Cod Community College)
4. Offer *Making Art, Making A Living* training series and conference. (Lead: Arts Foundation)

Activity Implementation Plan	Month (beginning with July 2004)											
	J	A	S	O	N	D	J	F	M	A	M	J
EDC Large Grant Program	X	X	X	X	X	X	X	X	X	X	X	X
EDC Small Grant Program			X	X		X		X	X			
WIB <i>Workforce Development Policy Blueprint</i> Implementation	X	X	X	X	X	X	X	X	X	X	X	X
Certificate, Associate Degree, and Specialty Training Programs	X	X	X	X	X	X	X	X	X	X	X	X
<i>Making Art, Making a Living</i>				X	X							

Goal 3: A vibrant economy built on strong traditional and emerging economic clusters	
Objectives	Support the hospitality and leisure cluster by promoting value-added tourism
	Support arts & culture cluster through training and creative marketing strategies
	Support the information and related technology cluster
	Support the micro/small business and entrepreneurship cluster
	Support the marine science and technology cluster

Support the energy efficiency, alternative energy cluster and programs
Support the education cluster by attracting students from outside the region

1. Continue to support traditional and emerging industry clusters through large and small grants. (Lead: Cape Cod Economic Development Council)
2. Continue to support the arts and culture cluster and promote value-added tourism through programs including *Passport to the Arts*, *Maritime Days*, *Everything Arts Guide*, *POPS by the Sea*, *Arts by the Sea*, and *Music on the Green*. (Lead: Arts Foundation, Cape Cod Chamber, & Cape Cod Commission)
3. Develop the organizational capacity of the EntreCenter and foster partnerships with Cape & Islands Community Development Inc., Lower Cape Community Development Corporation, Small Business Development Center, and other like entities already existing on the Cape; build a small direct EntreCenter client base and client management system. (Lead: EntreCenter/Cape Cod Chamber of Commerce)
4. Continue to provide loans and technical assistance to Cape businesses through the Cape & Islands Community Development Inc. (CDI). (Lead: Cape Cod Chamber of Commerce)
5. Continue the BizWiz program with a second annual conference and further workshop series. (Lead: Cape Cod Chamber of Commerce)
6. Continue the Business Information Resources Program. (Lead: Cape Cod Chamber of Commerce)
7. Continue to offer and strengthen the Business Builders Programs as well as continuing to provide seed funding through the micro-loan program to Outer and Lower Cape entrepreneurs. (Lead: Lower Cape Community Development Corp.)
8. Continue to provide the public with the comprehensive Business Information Center at the Cape Cod Community College library. (Lead: Cape Cod Community College)
9. Continue to provide technical assistance and public education programs in energy efficiency, including the twice-annual energy fairs. (Lead: Barnstable County/Cape Light Compact)
10. Continue collaborative efforts to identify ways to support the development of the renewable energy cluster through the Renewable Energy Committee. (Lead: Cape Cod Economic Development Council)
11. Continue to participate in the Ocean Working Group, a Southeastern Massachusetts collaboration to support the emerging marine technology cluster. (Lead: Cape Cod Economic Development Council)

Activity Implementation Plan	Month (beginning with July 2004)											
	J	A	S	O	N	D	J	F	M	A	M	J
EDC Large Grant Program	X	X	X	X	X	X	X	X	X	X	X	X
EDC Small Grant Program			X	X		X		X	X			
Arts and Culture Programs	X	X	X	X	X	X	X	X	X	X	X	X
EntreCenter	X	X	X	X	X	X	X	X	X	X	X	X

Activity Implementation Plan	Month (beginning with July 2004)											
	J	A	S	O	N	D	J	F	M	A	M	J
Cape & Islands Community Development Inc.	X	X	X	X	X	X	X	X	X	X	X	X
BizWiz Conference and Workshop Series			X	X	X		X	X	X	X	X	
Chamber Business Info. Resources Program	X	X	X	X	X	X	X	X	X	X	X	X
Business Builders Programs	X	X	X	X	X	X	X	X	X	X	X	X
Business Information Center	X	X	X	X	X	X	X	X	X	X	X	X
Energy Efficiency Program and Energy Fairs	x	x	x	X	x	x	x	x	X	x	x	x
Renewable Energy Committee				X			X	X			X	
Ocean Working Group	X	X	X	X	X	X	X	X	X	X	X	X

Goal 4: An economy that benefits all residents and preserves a healthy natural environment	
Objectives	Direct development to regional growth centers
	Improve wastewater infrastructure
	Improve access to child and elder care
	Support efforts to make housing affordable

1. Enact new countywide regulations to encourage development within designated Growth Incentive Zones (GIZ) and implement methods to reduce development outside the zones. (Lead: Cape Cod Commission)
2. Continue the Business Roundtable initiative to encourage towns to pass bylaws that encourage growth in town centers, cluster development, and the preservation of open space. (Lead: Association to Preserve Cape Cod)
3. Continue county wide affordable housing programs. (Lead: Cape Cod Commission)
4. Conclude the Pre-disaster Mitigation Planning project and submit the final plans to FEMA November 1, 2004. (Lead: Cape Cod Commission)
5. Continue to lead wastewater planning, assessment, and implementation projects through the Wastewater Implementation Committee. (Lead: Cape Cod Commission)
6. Continue to support smart growth efforts through large and small grants. (Lead: Cape Cod Economic Development Council)

Activity Implementation Plan	Month (beginning with July 2004)											
	J	A	S	O	N	D	J	F	M	A	M	J
Growth Incentive Zones	X	X	X	X	X	X	X	X	X	X	X	X
Business Roundtable	X	X	X	X	X	X	X	X	X	X	X	X
Child Care Task Force			X			X			X			X

Activity Implementation Plan	Month (beginning with July 2004)											
	J	A	S	O	N	D	J	F	M	A	M	J
Affordable Housing Forums				X						X		
Soft Second Loan Program	X	X	X	X	X	X	X	X	X	X	X	X
Barnstable Co. HOME Consortium	X	X	X	X	X	X	X	X	X	X	X	X
Barnstable Co. Housing Fund	X	X	X	X	X	X	X	X	X	X	X	X
Lower Cape Affordable Housing Program	X	X	X	X	X	X	X	X	X	X	X	X
Pre-disaster Mitigation Planning	X	X	X	X								
EDC Large Grant Program	X	X	X	X	X	X	X	X	X	X	X	X
EDC Small Grant Program			X	X		X		X	X			
Wastewater Implementation Committee	X	X	X	X	X	X	X	X	X	X	X	X

Goal 5: An integrated transportation and communications infrastructure in keeping with the character of Cape Cod	
Objectives	Identify infrastructure gaps
	Develop inter-modal transportation links
	Encourage use of auto alternatives
	Encourage affordable housing where transportation alternatives exist

1. Cape Cod Transit Task Force: continue to develop Outer Cape transit services; develop local transit centers; examine rail options and intelligent transportation systems; develop a central dispatch system; and complete a long-range public transit plan and an inter-regional advisory group on transit. (Lead: Cape Cod Commission)
2. Continue the Metropolitan Planning Organization (MPO) transportation planning process; implement the Transportation Improvement Plan (TIP); and complete annual traffic counting. (Lead: Cape Cod Commission)
3. Continue to publish the *Smart Guide* to alternative transportation on Cape Cod. (Lead: Cape Cod Chamber of Commerce)

Activity Implementation Plan	Month (beginning with July 2004)											
	J	A	S	O	N	D	J	F	M	A	M	J
Cape Cod Transit Task Force	X	X	X	X	X	X	X	X	X	X	X	X
Transportation Planning (RPA/MPO)	X	X	X	X	X	X	X	X	X	X	X	X
<i>Smart Guide</i>							X	X	X	X	X	

Goal 6: A top notch, affordable health care system	
Objectives	Provide training for health services workers
	Support the development of higher quality services and facilities
	Support efforts to make health care affordable

1. Continue to support the development of community health centers across the county. (Lead: Barnstable County Human Services)
2. Continue to develop and market an affordable insurance product for the self-employed and the “working poor.” (Lead: Barnstable County Human Services)
3. Continue the development and use of an integrated health information system that will link customers to service; providers to each other; and enroll individuals in public insurance programs. (Lead: Barnstable County Human Services)

Activity Implementation Plan	Month (beginning with July 2004)											
	J	A	S	O	N	D	J	F	M	A	M	J
Community Health Centers	X	X	X	X	X	X	X	X	X	X	X	X
Affordable Insurance for Working Poor	X	X	X	X	X	X	X	X	X	X	X	X
Health Services Information System	X	X	X	X	X	X	X	X	X	X	X	X

PRIORITY PROJECT
JULY 2004 – JUNE 2005 ACTION PLAN

Priority Projects

In recent months the different municipalities on Cape Cod have nominated an initial list of potential “priority projects.” While this list is not at all comprehensive it will provide a basis for discussion at a region-wide planning session planned for the early Fall. The next annual report should include a final set of priority projects and detailed explanations of their importance to economic development on Cape Cod and the CEDS goals and objectives.

INFRASTRUCTURE

The National Marine Life Center (NMLC): The National Marine Life Center is located in the village of Buzzards Bay in Bourne. The mission of the NMLC is to rehabilitate and release stranded whales, dolphins, seals, and sea turtles, and to advance scientific knowledge and education in marine wildlife health and conservation. The leaders of the National Marine Life Center, Inc., a private, independent not-for-profit organization, are raising money to renovate a building to create a marine animal rehabilitation hospital and science/education center. The hospital will give medical care to stranded seals, dolphins, marine turtles and small whales. The public will be able to visit the marine animal science center. A temporary facility was opened in

December 2003 and received its first patient, a loggerhead turtle, in March 2004. Further funding is required to build and staff a permanent facility.

Town of Orleans Industrial District: The Town of Orleans is seeking funds to improve access to its industrial district by building a new access road. The project is estimated to cost \$1.5 million.

PLANNING

The Provincetown Economic Revitalization Strategy: The Town of Provincetown is seeking funds to develop a long-term economic development strategy that will help support year-around sustainable business activity. The project, included a comprehensive public participation process, is estimated to cost \$100,000.

Town of Orleans Wastewater Management Plan: The Town of Orleans is seeking funds to complete a needs assessment and public participation process around the development of a wastewater management program for the business districts. This project is estimated to cost \$400,000 and is vital to continued business development and affordable housing development in the town.

Priority Project Implementation Schedule

Activity	Month (beginning with July 2004)												
	J	A	S	O	N	D	J	F	M	A	M	J	
National Marine Life Center (NMLC)	X	X	X	X	X	X	X	X	X	X	X	X	X
Town of Orleans Industrial District							X	X	X	X	X	X	X
Provincetown Economic Revitalization Strategy							X	X	X	X	X	X	X
Town of Orleans Wastewater Management Plan							X	X	X	X	X	X	X

EVALUATING THE CEDDS

Background

The evaluation component of the Barnstable County CEDDS process and document is still in its nascent stage. In the 2003 Annual Report the CEDDS Contributors Group decided to focus the evaluation effort on assessing the performance of specific activities undertaken during the year. Over the next several years, this focus will be expanded to evaluate priority projects that have been identified and our overall progress in meeting the CEDDS goals and objectives.

Purpose of the Evaluation Component

The purpose of the CEDDS evaluation component, as envisioned by the CEDDS Contributors Group, Advisory Board, and Strategy Committee, is to cement the link between planning and implementation. The evaluation process is an incentive for groups to implement the activities listed in the CEDDS and stimulate changes and refinements to the plan on an ongoing basis. Most importantly, the evaluation component is meant to encourage coordination and partnerships between stakeholders in both the short and long term.

Evaluation Approach

Given the structure of the Cape Cod region's CEDDS report, we plan to employ a three-tiered evaluation approach that will help economic development stakeholders gauge:

1. the status of ongoing economic development activities,
2. the status of priority projects identified during the CEDDS planning process, and
3. the region's progress towards realizing the vision of a "balanced, sustainable economy" over time.

Thus, the first tier will focus on CEDDS activities, showing progress in the short term on a project-by-project basis. The second tier will be the evaluation of the region's priority projects as these are designated. The third tier will focus on the CEDDS goals, attempting to track progress over the long term based on a set of standard benchmarks.

Evaluation Methodology

Activities Evaluation: The 2003 Annual Report included, for the first time, an evaluation section effectively grading the activities of the past year relative to the CEDDS goals and objectives established in the 5-Year Plan submitted in 2002. The evaluation section included both quantitative and qualitative measures for each task or activity. The quantitative measures were meant to document levels of participation and effort in an activity and, where possible, the outcome or impact of the activity. Examples of quantitative measures used include:

- The number of attendees at CEDDS planning meetings
- The number of technical certifications awarded
- The number of affordable units added over the past year

- The number of research studies completed
- The amount of funding dedicated to specific target training areas

In evaluating activities qualitatively, reviewers were asked to consider how those intended to benefit from them received the activities or services and how well they were integrated into the larger economic development effort. Thus, quantitative measures were expected to help answer questions such as: Are we reaching enough people? Are we getting the word out? Are we dedicating enough staff time and funding? Did we meet our goal for the year? Qualitative measures, on the other hand, were expected to elaborate on the numeric measures by focusing attention on the usefulness of the activity relative to its intended purpose and CEDS goals and objectives to which it relates.

The final step in evaluating the region's on-going economic development activities was to determine the overall status of each activity using the following hierarchy:

Status Category
On Course
Making Substantial Progress
Re-evaluated and Revised; New Initiative
Increased Focus Needed
On Hold; Will be Re-evaluated

The status categories were established by the CEDS Contributors group. The status of each activity was initially determined by the responsible agency and then reviewed by the larger CEDS Contributors group.

To facilitate the annual evaluation of activities for inclusion in the CEDS report the team has developed an Activity Update & Evaluation Form, which each of the CEDS Contributors have been asked to complete for this CEDS annual report. The completed forms are included in Appendix C of this report. Finally, the CEDS Contributor's Group, Advisory Board, and Strategy Committee are currently considering an evaluation subcommittee to further strengthen the evaluation component of the CEDS.

Priority Projects Evaluation: At this time the region has only barely begun to develop a priority projects list. For a project to be placed on the priority list it must have the potential for receiving funding from the Economic Development Administration (EDA) and be consistent with the overall goals of the CEDS and the larger Regional Policy Plan adopted by Barnstable County. Once identified, these projects will be evaluated annually until they are completed and follow-on evaluation is deemed unnecessary. Pending adoption of a formal evaluation procedure for priority projects, it is understood that it shall include as benchmarks the EDA investment guidelines. Once the CEDS leadership establishes an evaluation subcommittee or similar administrative structure, a more detailed evaluation methodology will be developed for the review of priority projects.

Goals Evaluation: To date, progress towards the CEDS goals for the Cape Cod Region has not been systematically evaluated. This will be a high priority for the CEDS Contributors Group over the next few years. One approach being considered is the identification of a set of benchmarks linking back to the goals that will be tracked over time. Preferably, these benchmarks would be standard indicators, such as employment rates and real income growth that are widely available and generally accepted. It is likely that, if established, the Evaluation Sub-Committee would research this and other evaluation options that will independently show progress over the long term.

Activities Evaluation

This section summarizes the actual performance of economic development activities over the past year as reported by the CEDS Contributors Group. As discussed in the methodology section, each activity was assessed using an Activity Update & Evaluation form, all of which are included in Appendix C of this report. Overall this reporting process has proved successful with only a few exceptions. The quantitative and qualitative measurement sections continue to be the most difficult for the respondents to complete. In many cases quantitative measures tend towards inputs rather than outcomes, a common problem in this type of work. Nevertheless, a consistent picture of all the activities taking place throughout the region and some sense of their relative success is beginning to emerge and will prove very helpful in the ongoing planning process.

In terms of overall performance, most activities were described as on course or making substantial progress. Only a few activities were on hold, primarily due to staff changes and organizational transition that is well on its way towards being settled.

Status Category	Percentage of All Activities
On Course	34
Making Substantial Progress	12
Re-evaluated & Revised; New Initiative	8
Increased Focus Needed	0
On Hold; Will be Re-evaluated	3

Several new activities were added to the mix; the EntreCenter to support entrepreneurship; the Passport to the Arts to support the arts and culture cluster; and the Sustainability Outreach Program to help integrate the concepts of sustainability in the public and private sectors. While only one program is officially being revised, a large number of activities will be changed and generally enhanced over the coming year. A few programs will not be able to continue or are pending due to funding concerns. The following table, sorted by lead organization, lists the evaluation status for each of this year’s activities.

CEDS Contributor Organization Acronym Key	
Organization Name	Acronym
Arts Foundation of Cape Cod	AFCC
Barnstable County Department of Human Services	BCHS

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Cape Cod Commission	CCC
Cape Cod Community College	CCCC
Cape Cod Center for Sustainability	CCCS
Cape Cod Chamber of Commerce	Chamber
Cape Light Compact	CLC
Cape Cod Economic Development Council	EDC
Lower Cape Community Development Corporation	LCCDC

Activity Name	Lead Org.	Status	Continue Next Year?
Arts by the Sea	AFCC	On Hold	Yes, with changes
Arts Foundation Grant Program	AFCC	Being Revised	Yes, with changes
Everything Arts (events listing)	AFCC	On Course	Yes
Making Art, Making a Living	AFCC	On Hold	Yes, with changes
Music on the Green	AFCC	On Course	Yes
Passport to the Arts	AFCC	New	Yes
POPS by the Sea	AFCC	On Course	Yes
Affordable Insurance for Working Poor	BCHS	Making Progress	Yes
Certified Medical Interpreter	BCHS	On Course	No – spun off
Community Health Centers	BCHS	Making Progress	Yes
Health Services Information System	BCHS	Making Progress	Yes, with changes
Affordable Housing Forums	CCC	On Course	Yes
Barnstable Co. HOME Consortium	CCC	On Course	Yes
Barnstable Co. Housing Fund	CCC	On Course	Yes
Cape Cod Transit Task Force	CCC	On Course	Yes, with changes
CEDS Coordination	CCC	Making Progress	Yes
Growth Incentive Zones	CCC	Making Progress	Yes
Maritime Days	CCC	On Course	Yes, with changes
Project Impact/Pre-Disaster Plng.	CCC	On Course	Yes, Pending Funds
Regional Infrastructure Plan (RIF)	CCC	On Hold	No
Soft Second Loan Program	CCC	New/Revised	Yes
Transportation Planning (RPA/MPO)	CCC	On Course	Yes
Wastewater Implementation Cmty.	CCC	On Course	Yes
2+2 Partnership for Baccalaureate	CCCC	Making Progress	Yes
Advancing the Field – Early Child. Ed.	CCCC	Making Progress	No
Associate of Science Degree Program	CCCC	Making Progress	Yes, with changes
Business Information Center	CCCC	On Course	Yes
Cape & Islands School-Career Partshp	CCCC	On Course	Yes
Cape & Islands Tech Prep Consortium	CCCC	On Course	Yes, with changes
Cape Cod College Bound	CCCC	On Course	Yes
Cape Cod Ctr. for Graduate Education	CCCC	On Course	Yes
Career & Technical Certification Prog.	CCCC	Making Progress	Yes, with changes
Community Leadership Institute (CLI)	CCCC	On Course	Yes

Activity Name	Lead Org.	Status	Continue Next Year?
Energy Technology Curriculum	CCCC	Making Progress	Yes, with changes
Senior Citizen & Adult Learners	CCCC	Making Progress	Yes, with changes
Workforce Ed. Resource Ctr. (WERC)	CCCC	Making Progress	Yes, with changes
Sustainability Indicator Report	CCCS	On Course	Yes
Sustainability Indicators Council	CCCS	On Course	Yes, with changes
Sustainability Outreach Program	CCCS	New	Yes
“Smart Guide – car free ways...”	Chamber	On Course	Yes
BizWiz Conference	Chamber	On Course	Yes, with changes
BizWiz Training Series	Chamber	On Course	Yes, with changes
Business Information Resources Prog.	Chamber	On Course	Yes, with changes
Cape & Islands CDI	Chamber	On Course	Yes
Child Care Task Force	Chamber	On Course	Yes
EntreCenter	Chamber	New	Yes
Cape Light Compact Programs	CLC	On Course	Yes
Economic Development Professionals	EDC	New	Yes
License Plate Large Grant Program	EDC	On Course	Yes, with changes
License Plate Small Grant Program	EDC	On Course	Yes
Ocean Economy Working Group	EDC	New	Yes
Renewable Energy Committee	EDC	New	Yes
Business Builders: Artists	LCCDC	On Course	Yes
Business Builders: Loan Programs	LCCDC	On Course	Yes
Business Builders: Software Training	LCCDC	On Course	Yes
Business Builders: Technical Asst.	LCCDC	On Course	Yes
Business Builders: Workshops	LCCDC	On Course	Yes, with changes
Lower Cape Affordable Housing	LCCDC	On Course	Yes

Priority Projects Evaluation

At this point no priority projects have been identified through a formal CEDS process and cannot therefore be evaluated.

Goals Evaluation

Over the next year the CEDS team plans to evaluate the CEDS goals relative to the indicators identified by the Sustainability Indicators Council in their *2003 Cape Cod Sustainability Indicators Report – An Uncertain Future* (see Appendix E for a summary of the indicators report). Progress on this effort will be included in the 2005 CEDS annual report.