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CAPE COD
COMMISSION

JUNE 30, 2013

Ms. Tonia Williams, Regional Director
Economic Development Administration
U.S. Department of Commerce
Philadelphia Regional Office
The Curtis Center, Suite 140 South
601 Walnut Street
Philadelphia, Pennsylvania 19106-3323

Dear Ms. Williams :

Please accept the enclosed Cape Cod Comprehensive Economic Development Strategy (CEDS) Annual Report for Year 1 of our 2014 CEDS 5-Year Plan. The Annual Report has been approved by the CEDS Strategy Committee (the Cape Cod Economic Development Council) and by the Cape Cod Commission.

The CEDS over the past six years has given focus to the region's economic development efforts and spurred collaboration among stakeholders across the region. Our success is in part due to the support of EDA through three short-term planning funds that ultimately led to the region being designated an Economic Distress District (EDD). Past EDA funding has been pared with increased investment by Barnstable County in the implementation of the CEDS. At this time, annual funding associated with the EDD designation has not been forthcoming but we are hopeful that the EDA will be able to allocate funding soon to address the economic concerns that led to the designation.

The enclosed Annual Report documents our progress over the past year towards strengthening our regional economy and implementing the CEDS strategy. The report tracks the health of the regional economy, the effectiveness of the CEDS planning process to develop regional partnerships, and the accomplishments over the past year in terms of the implementation plan and the regional priority projects.

We look forward to your review of the Annual Report and thank you for your support of our local process.

Sincerely,

Paul Niedzwiecki
Executive Director

Richard Roy
Chair

Cape Cod Comprehensive Economic Development Strategy (CEDS)

2015 Annual Report

June 30, 2015

Submitted To:
US Department of Commerce Economic Development Administration

Approved & Submitted By:
Cape Cod Commission, Barnstable County, Massachusetts

Table of Contents

Executive Summary

The Comprehensive Economic Development Strategy (CEDS) for Cape Cod is an economic development blueprint for the region that is consistent with the Regional Policy Plan. The CEDS is a planning process as well as a plan. The process is led by the CEDS Strategy Committee and includes stakeholders across regional and local organizations with an interest in economic development. The CEDS document lays out a vision and goals for economic development on Cape Cod as well as an action plan for achieving those goals. Leadership and collaboration are essential to the implementation of this plan. The following annual report outlines the regions progress towards implementation of the five-year plan completed in 2014.

SUMMARY BY CHAPTER

CEDS STRUCTURE AND PROCESS

The Cape Cod Commission is the regional planning agency for Barnstable County. The Commission is charged, under the Cape Cod Commission Act (1989 state legislation), to "ensure balanced economic development" that will provide quality jobs today and preserve the natural resources, beauty, and heritage of Cape Cod for the next generation. 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 RPP establishes a basis for economic development planning on Cape Cod, envisioning synergy between economic development and the protection and preservation of the Cape's resources and heritage. The CEDS is built on the Cape Cod Regional Policy Plan (RPP); it incorporates the economic development goals and regional growth policy from the RPP.

The CEDS is built on the Cape Cod Regional Policy Plan (RPP); it incorporates the economic development goals and regional growth policy from the RPP.

The Cape Cod Commission staffs the development and implementation of the CEDS while the Cape Cod Economic Development Council (EDC) serves as the CEDS Strategy Committee for Barnstable County. The EDC is a 14-member advisory council to Barnstable County. The EDC, together with the Cape Cod Commission members, represent the economic development constituencies called for in the federal EDA guidelines.

This annual report was prepared by the Commission's Chief Economic Development Officer, reviewed and endorsed by the EDC/CEDS Strategy Committee, and approved by the full 18 member Cape Cod Commission.

CEDS VISION

Economic development on Cape Cod begins with the protection of the natural, built, and cultural assets that make this region unique. The importance of being unique should not be underestimated in this era of standardization. Cape Cod has the enviable advantage of having near global name recognition and a reputation for being a special place of great beauty. The Cape Cod character has attracted not only tourists, retirees, and second homeowners, but also scientists, entrepreneurs, artists, and professionals to live and work in this otherwise remote location.

The region's economic strategy is based on four core economic development principles:

- *Protect and build on your competitive advantage* – For the Cape, this is the region's unique natural environment, historic village character, working agricultural land, harbors, and cultural heritage.
- *Use your resources efficiently* – Resources include natural assets, capital facilities, infrastructure, and human capital. Population and land use patterns affect efficiency.
- *Foster balance and diversity* – Economic strength and sustainability benefit from a mixture of industries, businesses, workers, ownership types, and employment options.
- *Expand opportunity and regional wealth* – Methods include increasing exports, substituting imports locally, attracting capital, and fostering local ownership.

Cape Cod's long-term economic vision is based on these principles and the principle of sustainability – the opportunities of today shall not undermine the opportunities of future generations:

Cape Cod is a mosaic of historic villages, dynamic economic centers, and healthy natural areas where a diverse array of viable employment and business opportunities exist that retain and attract income to the region and are supported by reliable infrastructure designed to serve a modern economy and protect the natural assets and historic character of the region.

There are five goals included in the CEDS. The first four are directly from the Cape Cod Regional Policy Plan that governs land use policy at the regional level. The fifth goal pertains to the CEDS process specifically. The goals are:

<u>Goal - ED1: Low-impact and Compatible Development</u>

To promote the design and location of development and redevelopment to preserve the Cape's environment and cultural heritage, use infrastructure efficiently, minimize adverse impacts, and enhance the quality of life for Cape Codders.

<u>Goal - ED2: A Balanced Economy</u>

To promote a balanced regional economy with a broad business, industry, employment, cultural and demographic mix capable of supporting year-round and quality employment opportunities.

<u>Goal - ED3: Regional Income Growth</u>

To promote economic activity that retains and attracts income to the region and benefits residents, thus increasing economic opportunity for all.

<u>Goal – ED4: Infrastructure Capacity</u>

To provide adequate capital facilities and infrastructure that meet community and regional needs, expand community access to services, and improve the reliability and quality of services.

<u>Goal – CEDS1: Regional Collaboration & Joint Commitment</u>

To provide a forum for local and regional organizations to be actively involved in determining and executing economic development policies and projects.

Evaluating the Region's Progress

There are a number of measures used in this report to gauge regional economic progress. The first are EDA's measures of distress that show 13 census tracts of Cape Cod's fifty-seven tracts qualifying as distressed. The data, American Community Survey five year estimates, show between 40,000 – 56,000 people living in tracts where the unemployment rate is at least 1% higher than the national average and/or per capita incomes are less than 80% of the national per capita income.

The Regional Benchmarks created by the Cape Cod Commission compare the region's performance using standard economic measures for Massachusetts and the Nation to get a sense of relative prosperity and progress. The benchmarks show a growing regional product of over $9 Billion but still less than the years prior to the recession. The data also show modest gains in employment consistent with the modest gains found nationally and in Massachusetts.

While a less seasonal economy than in the past, the region still depends heavily on the summer tourism season for jobs and income. We continue to have a lower share of emerging sectors with their higher wages than the state or nation and average weekly wages are lower in all industries on the Cape than elsewhere. And, like everywhere else, average wages have not grown in any significant way since 1990. That said, the number of households with incomes above $150,000 has gone from 1% in 1990 to 11% in 2013. Clearly, there are many households on Cape Cod that do not depend on the local economy for income.

Evaluating the CEDS Planning Process

The goal of the CEDS planning process is to provide a forum where local and regional organizations impacting economic development can work together to form policies and execute projects. The CEDS process has been very successful in forming new strong partnerships between regional organizations that, in the past, were typically considered adversaries, and between regional organizations and towns that, in the past, were often at odds. Efforts to disseminate information and increase understanding of what economic development means on Cape Cod continue. The annual Smarter Cape Summit and the STATSCapeCod website are some examples. CEDS efforts have been successful in channeling and increasing public funds towards the implementation of CEDS priorities and projects.

Evaluating the CEDS Implementation Plan

Each year the EDC/CEDS Strategy Committee and the Cape Cod Commission agree to a work plan the implementation of which is funded jointly by the EDC, Cape Cod Commission, and EDA through a short-term planning grant. The work plan includes economic development planning, research, public outreach, data dissemination, and implementation of regional priority projects as well as providing economic development assistance to towns. Some of these activities are on-going while others were completed within the year. Only one project has been postponed this year but is picked up in the work plan for year 2.

Evaluating progress on the CEDS Regional Priority Project

The following table lists the ten regional priority projects selected for inclusion in the CEDS 5-year plan completed in 2014. The table includes the long-term goals of the project, when it might be expected to be achieved, and how far along the region is towards achieving the goal. More details on the work accomplished over the past year are included in Chapter 3 for each project.

Regional Priority Project Name	Project Goal	Estimated Year for meeting Goal	Estimated Percent Complete
Cape Cod Capital Trust Fund	Fund Established and Operating	2020	20%
Wastewater Infrastructure in Growth Areas	Sewer Services in designated Growth Centers	2040	40%
Integrated Infrastructure Planning	Regional Infrastructure Plan	2017	5%
Commuter Rail Impact Analysis	Complete region-wide impact analysis	2017	25%

Regional Priority Project Name	Project Goal	Estimated Year for meeting Goal	Estimated Percent Complete
SIO Regional Services	E-permitting in all 15 towns	2025	25%
Climate Change Impacts	Completed assessment of economic impact	2018	25%
Last Mile Broadband	Open-Cape dominant provider of broadband in region	2025	15%
Business Dev. Revolving Loan	Loan fund established and operating	2020	5%
Expedited Permitting	New development locates in Growth Centers and not outside	2030	30%
Harbor Planning	Completed Planning Study	2018	0%

Chapter 1: CEDS Structure & 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 CEDS is built on the Cape Cod Regional Policy Plan (RPP); it incorporates the economic development goals and regional growth policy from the RPP.

THE LEGAL AND PHILOSOPHICAL BASIS FOR THE CEDS

The Cape Cod Commission is charged, under the Cape Cod Commission Act (1989 state legislation), to "ensure balanced economic development" that will provide quality jobs today and preserve the natural resources, beauty, and heritage of Cape Cod for the next generation.

THE CAPE COD COMMISSION ACT

The Cape Cod Commission was established in 1990 through an Act of the Massachusetts State Legislature (1989) and a countywide referendum. The Cape Cod Commission Act outlines the agency'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 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 is authorized (1) to regulate developments that are considered to have regional impact, (2) oversee land use planning on Cape Cod, and (3) recommend the designation of areas as Districts of Critical Planning Concern (DCPC), among other duties.

The Act specifies that the Commission shall "promote the expansion of employment opportunities; and implement a balanced and sustainable economic development strategy for Cape Cod capable of absorbing the effects of seasonal fluctuations in economic activity." The Commission Act and the Regional Policy Plan recognize that the Cape's economy is inextricably linked to the health and beauty of our natural and built environment, the preservation of which will provide positive and durable returns both in terms of private investment and public benefit.

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 synergy between economic development and the protection and preservation of the Cape's resources and heritage.

CAPE COD ECONOMIC DEVELOPMENT DISTRICT (EDD)

Cape Cod was designated an Economic Development District (EDD) by the EDA on December 19th, 2013. The district is comprised of the 15 towns that make up Barnstable County. In conferring this designation the EDA has committed to providing financial assistance to economic development in distressed communities on Cape Cod. EDA assistance was essential in obtaining the EDD designation as well as completing and implementing the CEDS. Potential future funding will be instrumental in reducing distress in this region.

THE CEDS PLANNING STRUCTURE

THE CEDS LEAD AGENCY

The Cape Cod Commission is the regional planning authority for the Cape Cod region. The Commission is charged with promoting sustainable development. It is a department of Barnstable County but with independent powers established under the Cape Cod Commission Act (outlined above).

The Commission's 19- members represent each town on Cape Cod, the County of Barnstable, the Governor, and the Native American and minority communities on Cape Cod (see sidebar to right). The Commission is supported by a staff of full-time planners and technical specialists in the areas of water resources,

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

Economic Development Staff (3.5)

- Chief Economic Development Officer (CEDS Manager)
- Environmental Economist
- Special Projects Coordinator
- Economic Development Council Administrative Assistant (0.5 FTE)

Other Staff (~40 total)

- Executive Director
- Deputy Directors (2)
- Technical Services Director
- Chief Planner
- Chief Regulatory Officer
- Land Use, Community Design, and Natural Resource Planners
- Transportation Engineers & Planners
- Hydro-geologists & Hydrologists
- Regulatory Officers

transportation, housing, natural resources, community design, and economic development. The Chief Economic Development Officer is the CEDS Project Manager.

THE CEDS STRATEGY COMMITTEE

The Cape Cod Economic Development Council (EDC) serves as the CEDS Strategy Committee for Barnstable County. The EDC is a 14-member advisory council to Barnstable County. The EDC, together with the Cape Cod Commission members, represent the economic development constituencies called for in the federal EDA guidelines. 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:

- Create a more educated and skilled workforce
- Expand artistic/cultural and intellectual capital
- Promote healthcare, technology, environmental science, and marine/coastal industry clusters
- Identify "choke points" involving physical infrastructure that limit options for economic 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:
  - Barnstable County Commissioners
  - Barnstable County Assembly of Delegates
  - Cape Cod Commission

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 CEDS ANNUAL REPORT APPROVAL PROCESS

The CEDS Strategy Committee (the Cape Cod EDC), endorsed and the Cape Cod Commission adopted the CEDS Annual Report on behalf of Barnstable County, as follows:

- Cape Cod Economic Development Council (June 4, 2015)
  Endorsed the CEDS Annual Report and recommended adoption by the Cape Cod Commission on behalf of Barnstable County

- Cape Cod Commission (June 25, 2015)
  Approved the CEDS Annual Report for submission to EDA on behalf of Barnstable County

Chapter 2: CEDS Vision

CHANGES OR UPDATES TO THE CEDS VISION

The foundation of the CEDS is the Regional Policy Plan (RPP) which the Cape Cod Commission updates on a five year cycle, most recently just prior to the 2009 Five-Year Update of the CEDS. <u>No changes were made to the economic development section in the last update of the Regional Policy Plan so this section has not changed.</u>

BACKGROUND

Economic development on Cape Cod begins with the protection of the natural, built, and cultural assets that make this region unique. The importance of being unique should not be underestimated in this era of standardization. Cape Cod has the enviable advantage of having near global name recognition and a reputation for being a special place of great beauty. The Cape Cod character has attracted not only tourists, retirees, and second homeowners, but also scientists, entrepreneurs, artists, and professionals to live and work in this otherwise remote location.

The Cape's traditional industries, such as cranberry cultivation and fin fishing, are also dependent on the health of the region's ecosystems and have been the first to suffer from our failure to see the links between the economy, land use, and environment. The decline of these traditional industries, combined with the use of suburban-style zoning and the entrance of national formula businesses, threaten the Cape's unique character and our ability to make a living in significant traditional ways.

The Regional Policy Plan (RPP), upon which the CEDS is built, looks at economic development from a land use and resource protection perspective, recognizing that these issues determine the mix and size of economic activities on the Cape. Land use is seldom the first thing that comes to mind in discussions of economic development. The focus is usually on job creation or quality, workforce availability, or how to attract a certain kind of business without realizing that if land use policy and zoning are not aligned with these goals, the goals are unlikely to be realized.

THE REGION'S GROWTH POLICY

The Cape Cod Commission lacks the authority to dictate local zoning or regulations, but, through the Regional Policy Plan does establish a growth policy for the region. Local and regional plans, including the CEDS, must be consistent with this policy and is herein adopted to guide the CEDS action plan and implementation.

THE GROWTH POLICY FOR CAPE COD
The growth policy for Barnstable County, expressed throughout the 2009 Regional Policy Plan, is to guide growth toward areas that are adequately supported by infrastructure and away from areas that must be protected for ecological, historical, or other reasons.

This policy is reflected in the comprehensive set of goals, planning actions, and regional regulations in the RPP that cover land use, economic development, water resources, natural resources, coastal resources, energy, historic and architectural resources, affordable housing, and transportation.

THE REGION'S ECONOMIC DEVELOPMENT VISION

The RPP recognizes that our economy is a public-private partnership in which government policy creates the frame and the private sector creates the content. The framework of the RPP, particularly the economic development section, is focused on the adequacy of public infrastructure and the role of land use in supporting or inhibiting different types of business activity. The economic development planning actions outlined in the RPP focus on improving the business climate, which includes the quality, clarity, and fair application of regulations, taxes, and fees.

The Regional Policy Plan defines the purpose of economic development as creating an environment in which individuals and businesses may prosper over the long term without depleting public resources or undermining the region's competitive advantage in the marketplace. Unlike business development, economic development focuses not on individual businesses, but on the business environment.

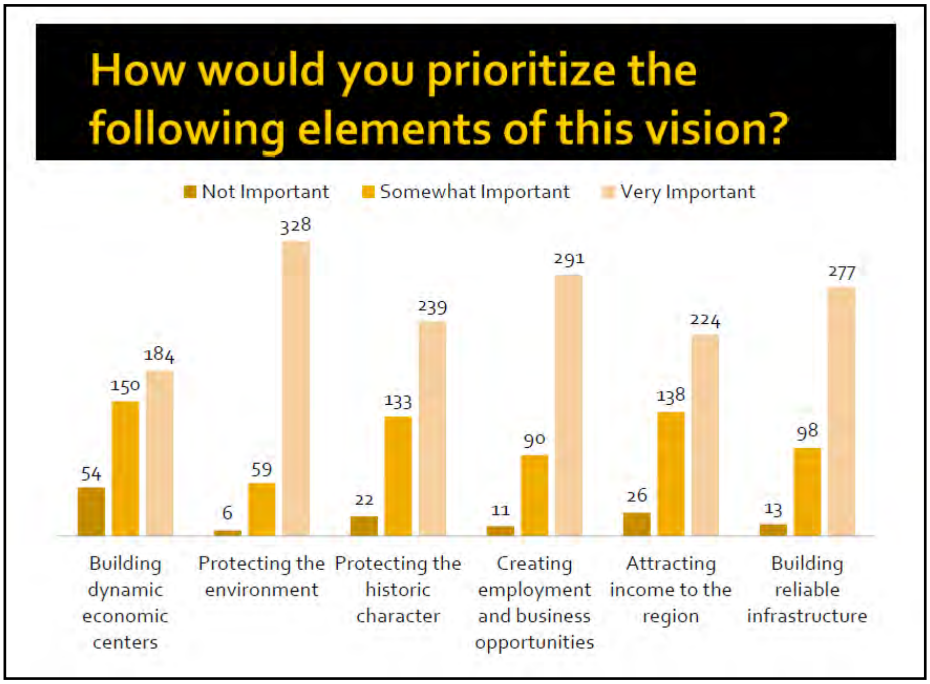
The RPP outlines four core economic development principles:

- *Protect and build on your competitive advantage* – For the Cape, this is the region's unique natural environment, historic village character, working agricultural land, harbors, and cultural heritage.
- *Use your resources efficiently* – Resources include natural assets, capital facilities, infrastructure, and human capital. Population and land use patterns affect efficiency.
- *Foster balance and diversity* – Economic strength and sustainability benefit from a mixture of industries, businesses, workers, ownership types, and employment options.
- *Expand opportunity and regional wealth* – Methods include increasing exports, substituting imports locally, attracting capital, and fostering local ownership.

These principles guide the economic goals, recommended planning actions, and regulatory standards of the RPP. Cape Cod's long-term economic vision is based on these principles and the principle of sustainability – the opportunities of today shall not undermine the opportunities of future generations.

A VISION FOR CAPE COD
Cape Cod is a mosaic of historic villages, dynamic economic centers, and healthy natural areas where a diverse array of viable employment and business opportunities exist that retain and attract income to the region and are supported by reliable infrastructure designed to serve a modern economy and protect the natural assets and historic character of the region.

The CEDS Stakeholder Survey, conducted in February 2014, asked respondents to prioritize the different elements included in this vision.



THE REGION'S ECONOMIC DEVELOPMENT GOALS

Four economic development goals are in the Regional Policy Plan and, by extension, in the CEDS. The first directly addresses the link between land use and economic development. The second focuses on the benefits of economic diversity, the third on regional income flows, and the fourth on the vital role of infrastructure in the development of an economy.

Goal - ED1: Low-impact and Compatible Development
To promote the design and location of development and redevelopment to preserve the Cape's environment and cultural heritage, use infrastructure efficiently, minimize adverse impacts, and enhance the quality of life for Cape Codders.

CAPE COD COMMISSION

The Low-impact and Compatible Development Goal for economic development is based on the principles of competitive advantage and efficiency: land use policy and development should complement the strengths that make Cape Cod unique and economically viable without taxing built, human, and natural resources beyond their capacity. As in the business world, regional economic success is built upon differentiating your product from that of your competitors and maximizing profits by running an efficient operation.

Achieving the goal of compatible development for Cape Cod requires creativity and innovation. Economic development tactics with significant impact on the long-term prosperity of the Cape are (1) strategic investments in wastewater infrastructure, (2) elimination of large-lot strip and subdivision zoning in favor of mixed-use, village style zoning, and (3) a system of transferable development rights under which a shift in development patterns becomes economically viable. Combined with targeted regulation, these tools may reduce impacts of high land prices on small businesses, the workforce, and economic diversity on Cape Cod. The new Regional Policy Plan addresses these issues.

Specific objectives under this goal are:

- Historic areas, structures, and scenic vistas are not destroyed or degraded by tear downs, visual obstructions, or other inappropriate development.
- Development and redevelopment is located in accordance with the RPP Growth Policy and Regional Land Use Vision Map.
- Infrastructure investments primarily serve those areas designated for development and redevelopment.

Goal - ED2: A Balanced Economy
To promote a balanced regional economy with a broad business, industry, employment, cultural and demographic mix capable of supporting year-round and quality employment opportunities.

There is a fine balance in regional economics between capitalizing on an area's competitive advantage and having enough economic diversity to withstand changes in the market. The Cape has seen industries come and go with changes in tastes, technology, and the emergence of competitors. Industries that today seem to define the Cape—for example, tourism—could persist or they could die out, as did leading regional industries of the past, such as salt production, whaling, and glass manufacturing. The Cape Cod Commission encourages flexible policies and development projects that can provide high-quality employment opportunities today and lend themselves to multiple uses over time.

Specific objectives under this goal are:

- Greater demographic diversity
- More year-round employment opportunities that pay wages consistent with the cost of living
- Less dependence on the seasonal tourism economy
- Strong base of locally owned businesses able to pay wages consistent with state and national averages

Goal - ED3: Regional Income Growth
To promote economic activity that retains and attracts income to the region and benefits residents, thus increasing economic opportunity for all.

A regional economy such as Cape Cod's can be equated to a pie with money as the filling. When money is added to the pie it gets larger; when it is removed the pie shrinks. The regional income goal seeks to enlarge the pie while giving everyone a chance to earn a bigger slice. Money is added to the economic pie when products made locally are sold to non-residents (i.e., exported) or goods previously imported are made and sold locally (i.e., import substitution). The size of the pie is also impacted by business ownership; locally owned businesses retain and circulate money within the pie to a greater degree than non-local businesses that naturally draw their profits back to their home office location and are more likely to use non-local suppliers of goods and services.

Specific objectives under this goal are:

- A strong tourism and second-home economy with fewer negative impacts on the environment, community, and infrastructure
- Increased export of products and services originating on Cape Cod
- Increase in value added locally to products harvested, designed, or built locally
- Increased quality and quantity of locally owned businesses that meet both the needs of residents and visitors

Goal – ED4: Infrastructure Capacity
To provide adequate capital facilities and infrastructure that meet community and regional needs, expand community access to services, and improve the reliability and quality of services.

Adequate, high-quality facilities and infrastructure are vital to a competitive economy and an engaged community. Capital facilities and infrastructure include everything from schools and libraries to high-speed telecommunication networks and public transit. Efficient facilities and reliable services are critical. They enable economic progress and civic participation, open new markets and educational opportunities, and protect communities from man-made and natural disasters. Cape Cod faces significant challenges to reach this goal. For example, the region currently lacks reliable energy service, sufficient high-speed and redundant telecommunication services at competitive prices, and wastewater infrastructure – all necessary for economic growth.

Specific objectives under this goal are:

- Symmetrical broadband service that allows as much data to be up-loaded and sent off Cape as can be downloaded from elsewhere
- Reliable energy supply that does not require generators and other mechanisms to protect against brown-outs
- Wastewater infrastructure that protects the environment while allowing development and redevelopment to occur only in those areas designated for growth

THE REGION'S GOAL FOR THE CEDS AND CEDS PROCESS

The process undertaken to complete this five-year update is unprecedented in the amount and quality of public participation. The overall goal for the CEDS process is for future CEDS updates and annual reports to have the same or even greater public participation.

Goal – CEDS1: Regional Collaboration & Joint Commitment
To provide a forum for local and regional organizations to be actively involved in determining and executing economic development policies and projects.

This year's CEDS process was much more focused and action-oriented than in the past and included greater participation. Through this process, existing partnerships were strengthened and new partnerships are enthusiastically being formed. We see tremendous momentum in the collaborative discussions to move projects forward and anticipate great success and prosperity over the next five-year period. The Cape Cod Commission and the Cape Cod Economic Development Council have gained unprecedented support for the CEDS process, for the proposed projects, and for greater collaboration in future implementation. Thus, the goal for the CEDS process is to facilitate this level of collaboration throughout the implementation of the Action Plan.

Specific objectives under this goal are:

- Attract public and private investment to the region and for the CEDS priority projects
- Create year-round jobs with competitive wages consistent with the cost of living on Cape Cod
- Strengthen and create new partnerships between organizations traditionally involved in economic development and others
- Improve regional awareness of economic development concepts and challenges specific to the Cape
- Improve availability of information and data on different aspects of the region and towns therein

Chapter 3: CEDS Evaluation

Implementation is the greatest challenge in planning. A well designed review process helps to move implementation forward and make necessary adjustments along the way. CEDS implementation is evaluated on an annual basis culminating in an Annual Report delivered to the US Economic Development Administration on June 30th of each year.

Evaluation of CEDS implementation happens at four levels:

1. Evaluating the Region's Progress
2. Evaluating the CEDS Planning Process
3. Evaluating the CEDS Implementation Plan
4. Evaluating progress on the CEDS Regional Priority Projects

Each aspect of the evaluation process involves the Strategy Committee and often other stakeholders involved in both CEDS planning and implementation. Quantitative and qualitative measures are used to gauge progress towards the CEDS goals overall or towards the goals of specific projects.

EVALUATING THE REGION'S PROGRESS

The land area of Cape Cod is 253,701 acres with 560 linear miles of shoreline in 15 towns:

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

REGIONAL DISTRESS INDICATORS

The following table provides the unemployment and income data used by the EDA to determine distress. The two criteria that the EDA uses to determine distress are (1) whether or not a community is subject to an unemployment rate that is, for the most recent 24 month period for which data are available, at least one percentage point greater than the national average unemployment; and (2) per capita income that is, for the most recent period for which data are available, 80 percent or less of the national average per capita income. This table was generated using the website developed by STATSAmerica.org with funding from the EDA. It shows the 24-month averages for each census tract in the region; those highlighted in orange represent distressed areas. The total population in these distressed tracts is 39,623 representing 18.4% of the total population of Cape Cod. It is essential to note that the dataset, American Community Survey (ACS) 5-year estimates, have very large margins of error. The previous run using STATSAmerica based on 2011 ACS data showed the total population in these distressed tracts is 55,713 representing 25.8% of the 2011 population.

Barnstable County Economic Distress Criteria—Primary Elements			Region	U.S.	Threshold Calculations
2013 Unemployment Rate (5-Year ACS)			8.2	9.7	-1.5
2013 Per Capita Money Income (5-Year ACS)			$36,142	$28,155	128.37%
Economic Distress Criteria—Geographic Components	Unemployment Rate 2013 ACS	Threshold Calculations	PCMI 2013 ACS	Threshold Calculations	Population Estimate 2013 5-Year Avg. ACS
Tract 0101.00	13.7	4	$45,204	160.6	2,964
Tract 0102.06	10.7	1	$39,276	139.5	3,012
Tract 0102.08	9.7	0	$39,472	140.2	1,731
Tract 0103.04	11.7	2	$38,586	137	2,001
Tract 0103.06	11.2	1.5	$34,793	123.6	2,944
Tract 0104.00	4.6	-5.1	$34,402	122.2	3,074
Tract 0105.00	5	-4.7	$49,437	175.6	2,803
Tract 0106.00	9.7	0	$45,270	160.8	3,396
Tract 0107.00	7.7	-2	$44,840	159.3	2,742
Tract 0108.00	7	-2.7	$37,241	132.3	5,097
Tract 0109.00	6.6	-3.1	$33,741	119.8	4,689
Tract 0110.02	11.9	2.2	$33,077	117.5	4,330
Tract 0111.00	9.4	-0.3	$32,825	116.6	4,582
Tract 0112.00	7.9	-1.8	$38,527	136.8	3,311
Tract 0113.00	10	0.3	$37,046	131.6	2,737

CAPE COD COMMISSION

Barnstable County Economic Distress Criteria—Primary Elements			Region	U.S.	Threshold Calculations
2013 Unemployment Rate (5-Year ACS)			8.2	9.7	-1.5
2013 Per Capita Money Income (5-Year ACS)			$36,142	$28,155	128.37%
Economic Distress Criteria—Geographic Components	Unemployment Rate 2013 ACS	Threshold Calculations	PCMI 2013 ACS	Threshold Calculations	Population Estimate 2013 5-Year Avg. ACS
Tract 0114.00	5.9	-3.8	$37,294	132.5	3,107
Tract 0115.00	9.2	-0.5	$28,131	99.9	3,515
Tract 0116.00	15.3	5.6	$26,988	95.9	2,978
Tract 0117.00	5.8	-3.9	$37,575	133.5	1,831
Tract 0118.01	4.6	-5.1	$50,428	179.1	2,423
Tract 0118.02	8.1	-1.6	$33,220	118	4,008
Tract 0120.01	8.1	-1.6	$33,749	119.9	5,867
Tract 0120.02	11.9	2.2	$26,797	95.2	3,021
Tract 0121.01	7	-2.7	$30,953	109.9	5,399
Tract 0121.02	9.5	-0.2	$35,754	127	3,008
Tract 0122.00	2.7	-7	$40,852	145.1	4,599
Tract 0125.02	11.9	2.2	$33,044	117.4	2,761
Tract 0126.01	9.2	-0.5	$24,937	88.6	3,236
Tract 0126.02	12	2.3	$22,175	78.8	4,675
Tract 0127.00	4.7	-5	$37,228	132.2	4,481
Tract 0128.00	8	-1.7	$32,669	116	4,282
Tract 0129.00	9.5	-0.2	$31,224	110.9	4,084
Tract 0130.02	12.5	2.8	$59,647	211.9	3,398
Tract 0131.00	6.4	-3.3	$43,006	152.7	5,543
Tract 0132.00	7	-2.7	$42,233	150	4,869
Tract 0133.00	8.4	-1.3	$36,949	131.2	3,152
Tract 0134.00	10.3	0.6	$36,793	130.7	4,176
Tract 0135.00	9.3	-0.4	$37,809	134.3	6,445
Tract 0136.00	4.2	-5.5	$29,051	103.2	6,716
Tract 0137.00	9	-0.7	$30,380	107.9	4,042
Tract 0138.00	8.4	-1.3	$34,088	121.1	5,044
Tract 0139.00	5	-4.7	$39,997	142.1	5,355
Tract 0140.02	5.8	-3.9	$33,723	119.8	4,259

CAPE COD
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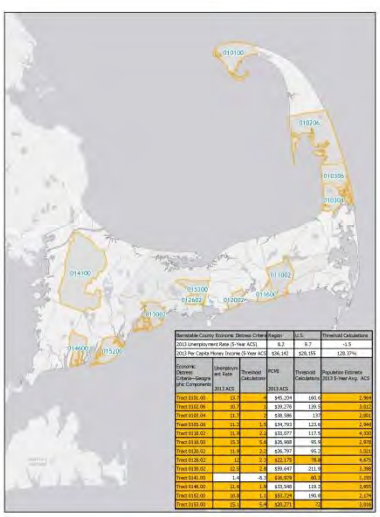
Barnstable County Economic Distress Criteria—Primary Elements			Region	U.S.	Threshold Calculations
2013 Unemployment Rate (5-Year ACS)			8.2	9.7	-1.5
2013 Per Capita Money Income (5-Year ACS)			$36,142	$28,155	128.37%
Economic Distress Criteria—Geographic Components	Unemployment Rate 2013 ACS	Threshold Calculations	PCMI 2013 ACS	Threshold Calculations	Population Estimate 2013 5-Year Avg. ACS
Tract 0141.00	1.4	-8.3	$16,979	60.3	1,155
Tract 0143.00	8.6	-1.1	$45,406	161.3	4,287
Tract 0144.02	8	-1.7	$34,650	123.1	6,467
Tract 0145.00	7.2	-2.5	$29,829	105.9	5,828
Tract 0146.00	11.6	1.9	$33,548	119.2	3,955
Tract 0147.00	9.7	0	$39,574	140.6	3,641
Tract 0148.00	9.5	-0.2	$44,061	156.5	3,519
Tract 0149.00	7.4	-2.3	$57,749	205.1	3,894
Tract 0150.01	4.5	-5.2	$29,054	103.2	4,522
Tract 0150.02	4.5	-5.2	$28,270	100.4	3,312
Tract 0151.00	2.9	-6.8	$36,129	128.3	3,992
Tract 0152.00	10.8	1.1	$53,724	190.8	2,174
Tract 0153.00	15.1	5.4	$20,271	72	3,016

Sources: U.S. Bureaus of Census (ACS 5-year estimates), Labor Statistics, and Economic Analysis; Calculations generated by StatsAmerica.



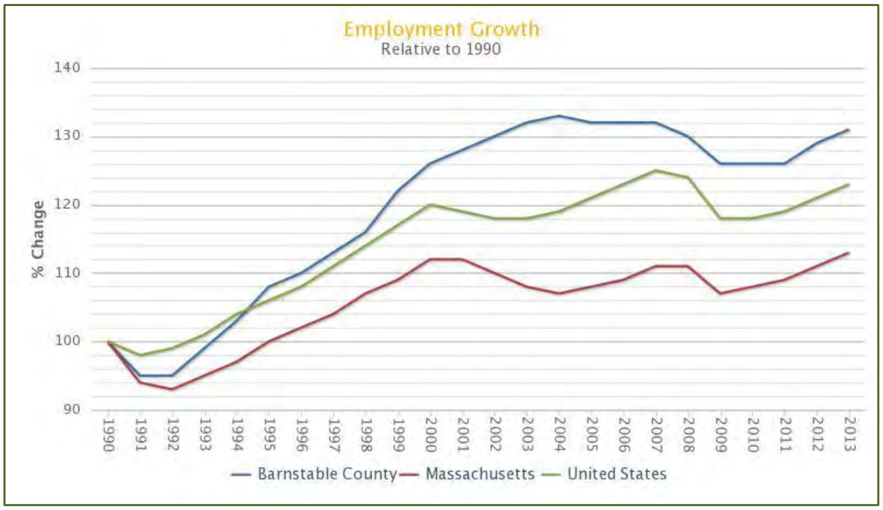
The Commission has been working to develop a set of measures to benchmark the progress of the region's economy and the economic well-being of its residents. These benchmarks are available on the Cape Cod Commission's web site STATSCapeCod.org along with much of the data presented in this chapter. The measures are designed around the four principles of economic development:

- *Protect and build on your competitive advantage* –The Cape's competitive advantage is its unique natural environment, historic village character, working agricultural land, harbors, and cultural heritage.
- *Use your resources efficiently* – Resources include natural assets, capital facilities, infrastructure, and human capital. Population and land use patterns affect efficiency.
- *Foster balance and diversity* – Economic strength and sustainability benefit from a mixture of industries, businesses, workers, ownership types, and employment options.
- *Expand opportunity and regional wealth* – Methods include increasing exports, substituting imports locally, attracting capital, and fostering local ownership.

Thus far measures focus on the last two of these principles: economic balance and regional wealth. These principles correspond to CEDS goals 2: A Balanced Economy and 3: Regional Income Growth. Economic strength and sustainability benefit from a diverse mixture of industries, businesses, workers, ownership types, and employment options.

Employment trends: Job creation

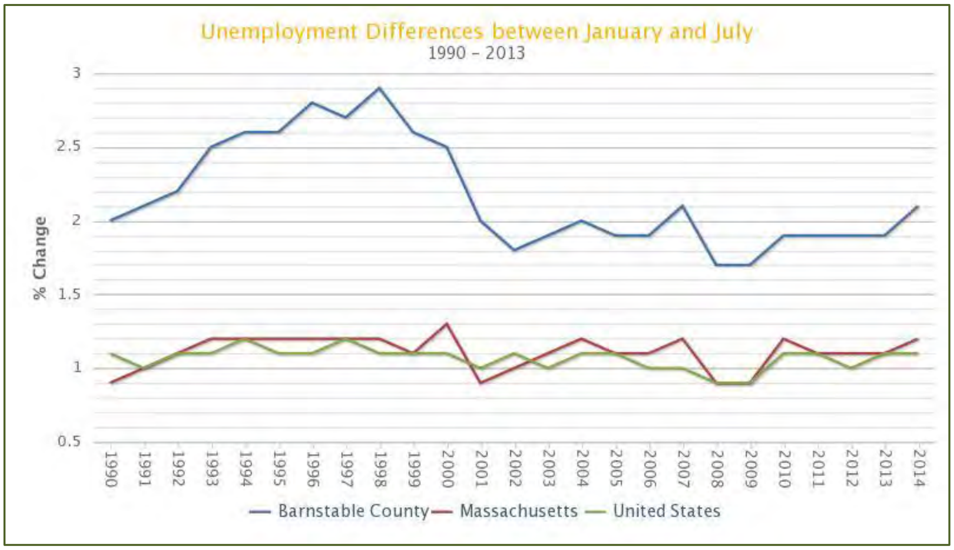
Employment on Cape Cod peaked in 2004 at 93,198 jobs at firms located in Barnstable County. 2013 employment in Barnstable County, the latest figures available, was 92,214. While still slightly below the peak we are increasing again since the recession. Employment patterns in recent years do mirror the state and national trends but our growth rate relative to the past is still higher.



Employment trends: Seasonality

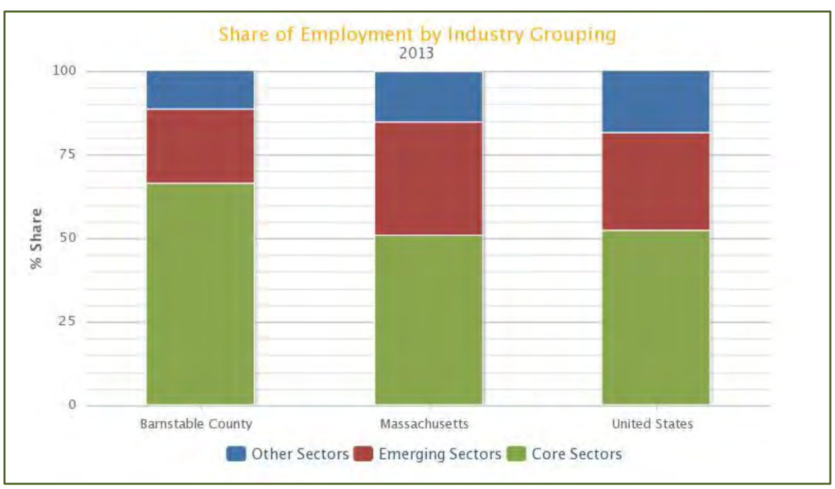
The Cape economy is more seasonal than the state or the national economy. However, data showing the difference between January and June unemployment rates do suggest that the region is less seasonal than it has been in the past.

Significant effort over the last two decades has been put towards extending the tourist season into the fall and spring. Problems in keeping part-time and seasonal help have, however, made this difficult. Changes in student school schedules have forced employers to depend on foreign workers, the visas for which have been limited themselves by the federal government. Second-home owners do support the weekend and holiday economic activity as well as the day and weekend tourists.



Employment trends: Industry clusters

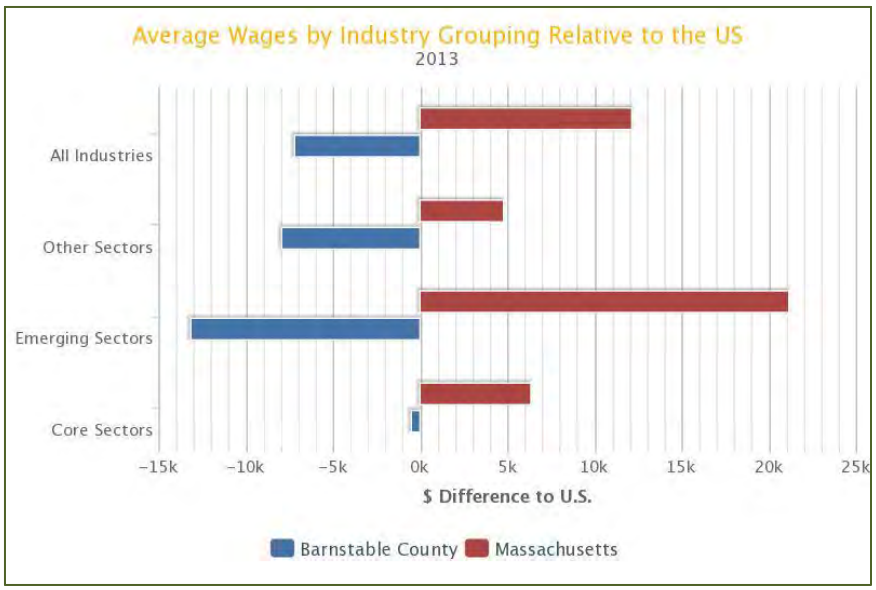
The Cape economy falls into three industry clusters: core, emerging, and other. The core industries include fishing, construction, real estate, retail trade, accommodation and food services, and health care. As a tourism destination many of these can be considered export activities serving people from outside the region and thereby attracting their income to Cape Cod. This explains in part why core industries form almost 20% more of the economic mix than they do in the US or in Massachusetts.



WAGE & Income trends: Industry clusters

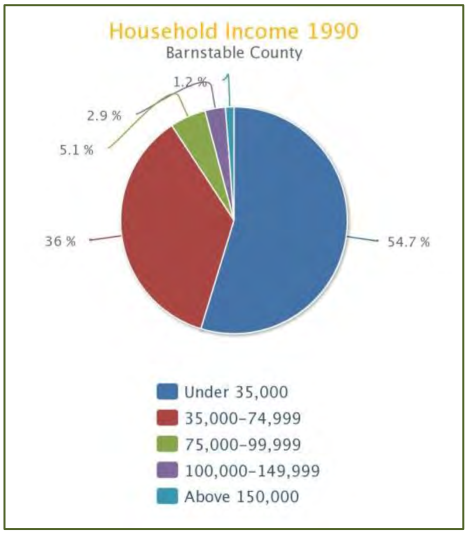
Emerging industries include Arts, Entertainment, and Recreation, Educational Services, Finance and Insurance, Information, and Professional, Scientific, and Technical Services. Businesses and economic leaders would like to see these industries grow in the future to better balance the tourism economy and provide more year-round, high-skill, high-wage jobs for residents.

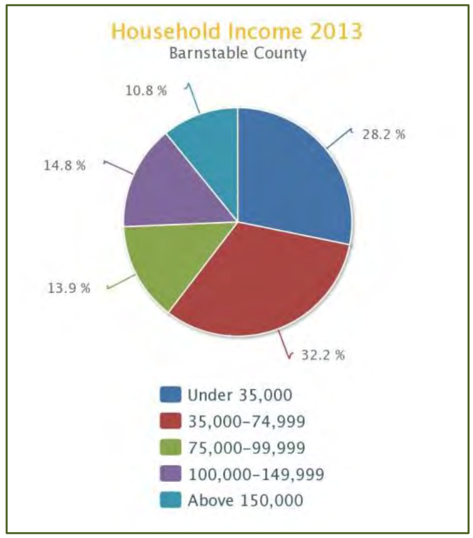
The importance of increasing industry diversity can be seen by looking at wage data. The average wage in the emerging industry cluster ($53,613 for Barnstable County) is significantly higher than in the core cluster ($34,766). Even so, emerging industry wages seriously lag those found statewide and in the US ($86,109 and $65,128 respectively).



WAGE & Income trends: Household Income

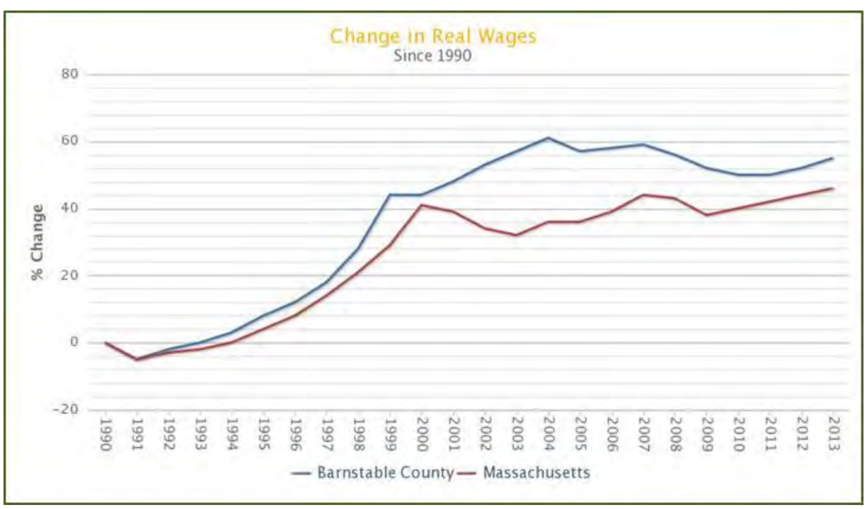
Without controlling for inflation, there appears to be a shift towards higher income groups on the Cape between 1990 and 2013. In 1990 only 9.2% of all households earned $75,000 or above; by 2010 this percentage had grown to 38.8% of all households. It is difficult to determine how much of the change in distribution is due to inflation versus increased wealth due to higher wages, in-migration of wealthier households, commuters earning higher off-Cape wages, non-earnings income growth, or other factors.





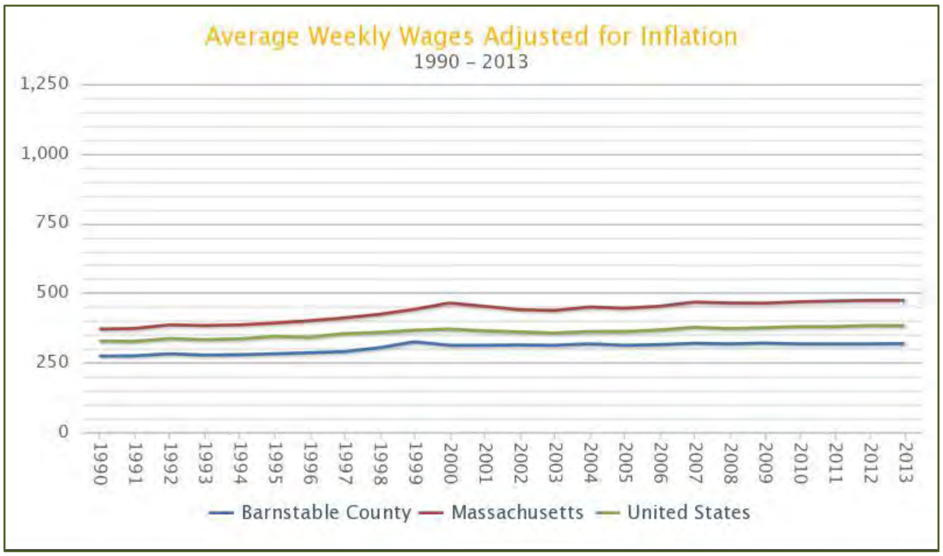
<u>Wage & Income trends: Total Wages in Real Terms</u>

Since 1990, total wages paid on Cape Cod have grown by 55% in real terms. Growth was very strong during the 1990s for both Barnstable County and the state. The county continued to grow until the recession hit mid-decade when the decline began to mirror the State's. Overall, however, this data show the positive impact of job growth for both the state and county over the past two decades.



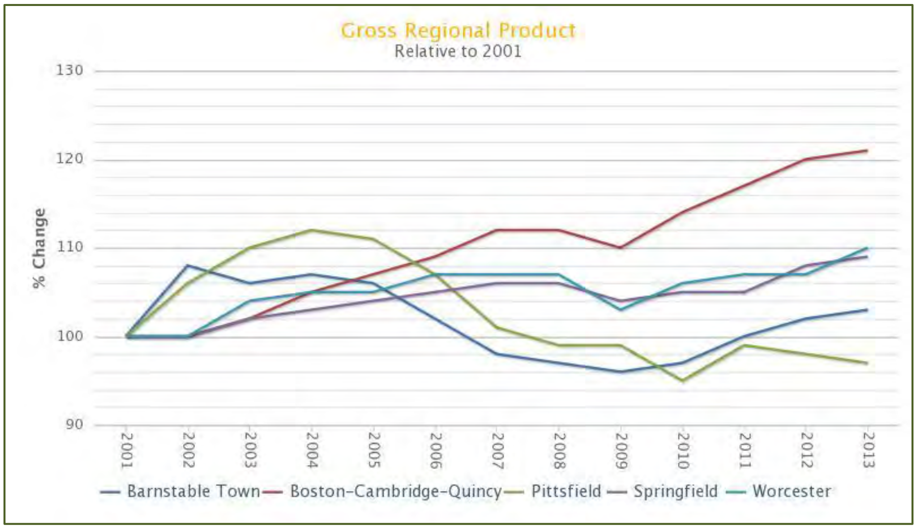
Wage & Income trends: Average wages per job

While the total amount of wages paid by employers in the county has grown, the average wage workers receive has remained flat when controlling for inflation. So while there are more jobs on the Cape, they are still not paying substantially more than they were in 1990.



Wage & Income trends: Regional Income

Barnstable County's Gross Regional Product is $9.4 billion in 2013 controlling for inflation. The area's regional product was stronger in the first half of this decade, dropping to below 2001 level in 2007. Some uplift is evident towards the end of the decade but the region has yet to recover to the levels prior to the recession.



Gross Regional Product (millions of chained 2005 dollars)					
Massachusetts Metro Areas					
Year	Barnstable Town (Cape Cod)	Boston-Cambridge-Quincy	Pittsfield	Springfield	Worcester
2001	9,158	287,899	5,471	21,073	31,802
2002	9,897	286,556	5,807	21,115	31,850
2003	9,752	292,507	5,993	21,533	33,185
2004	9,756	301,130	6,105	21,804	33,326
2005	9,719	306,848	6,090	21,967	33,477
2006	9,378	312,513	5,865	22,046	33,926
2007	9,005	322,823	5,520	22,237	34,104
2008	8,891	321,975	5,440	22,388	34,098
2009	8,772	315,377	5,397	21,840	32,646
2010	8,902	328,307	5,183	22,065	33,749
2011	9,163	335,814	5,402	22,145	33,963
2012	9,333	344,090	5,372	22,749	34,148
2013	9,431	349,652	5,319	22,895	35,022

CAPE COD
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EVALUATING THE CEDS PLANNING PROCESS

Evaluating the CEDS process focuses specifically on how well we have achieved the CEDS Process goal:

Goal – CEDS1: Regional Collaboration & Joint Commitment
To provide a forum for local and regional organizations to be actively involved in determining and executing economic development policies and projects.

The measures of success in implementing this goal are both process measures and outcome measures. They track the work put into the process and wherever possible the results of that work. Often, the outcome measures are the hardest to quantify and to track but every effort is made to do so.

The following table outlines some of the successes in reaching the goal of regional collaboration and joint commitment.

CEDS Process – Measures of Success – Accomplishments for Year 1				
Objective	Process/In-put Measures		Outcome Measures	
	Measure	Results	Measure	Results
Capital Investment	# of Grants Submitted: $$ of Funds Awarded	No grants submitted in year 1. County allocated $30,000 for Cape Cod Capital Trust Fund Feasibility Analysis – a Regional Priority Project.	$$ of Private Investment Leveraged	No new private investment in priority projects
Understanding of ED	# of Presentations given # of Reports published # of Articles written	Presented ED program and CEDS to County Assembly of Delegates, the Community Development Partnership and the Mashpee Wampanoag Tribal Council.	TBD	

CEDS Process – Measures of Success – Accomplishments for Year 1				
Objective	Process/In-put Measures		Outcome Measures	
		Survey of property owners on Cape Cod completed and report published.		
Strong Partnerships	# of Partnerships # of new Partnerships	Towns of Orleans, Barnstable, and Falmouth through joint planning projects currently underway	Formal Partnerships	Barnstable County & Open Cape; SmarterCape Partnership expanded by 3 new organizations; On Board of the Community Development Partnership (CDC addressing economic development and affordable housing)
Easy Access to Information	Progress made on STATSCapeCod	Site fully updated	STATSCapeCod user statistics	

The CEDS process goals for Year 2 are listed in the following table.

CEDS Process – Measures of Success – Goals for Year 2				
Objective	Process/In-put Measures	Goal	Outcome Measures	Goal
Capital Investment	# of Grants Submitted: $$ of Funds Awarded	1 grant submitted	$$ of Private Investment Leveraged	TBD
Understanding of ED	# of Presentations given # of Reports published # of Articles written	5 presentations 2 RESET Reports 1 Article	TBD	
Strong Partnerships	# of Partnerships # of new Partnerships	Continue existing	Formal Partnerships	Continue existing;
Easy Access to Information	Progress made on STATSCapeCod	Maintain site; upgrade maps	STATSCapeCod user statistics	Increase by 10%

EVALUATING THE IMPLEMENTATION PLAN

Each year the implementation plan is fully vetted by the Strategy Committee both in terms of what is included for a given year and how much progress was made on the previous year's workplan. The implementation plan included the following areas:

- Economic Development Planning
- Research
- Public Outreach
- Data Dissemination
- Regional Priority Projects led by the Cape Cod Commission
- RESET: Direct Technical Assistance to Towns

The following table outlines the activities slotted for Year 1 and the progress made towards completing those actions within the year. This represents the complete scope of work in the area of economic development undertaken by the Cape Cod Commission in Year 1.

Cape Cod Commission Economic Development Work Plan – Year 1					
Action	Activities	Complete	In Progress	Postponed	Comments
Economic Development Planning	Update the economic development planning and regulatory sections of the Regional Policy Plan (RPP)		x		The RPP update process began in December 2014 and should be complete by the end of 2015.
	Review Developments of Regional Impact, Local Comprehensive Plans, Growth Incentive Zones and Districts of Critical		x		On-going activity dependent on the amount of large development being proposed on Cape Cod and on Towns actions.

Cape Cod Commission Economic Development Work Plan – Year 1					
Action	Activities	Complete	In Progress	Postponed	Comments
	Planning Concern				
	Coordinate EDC/CEDS Strategy Committee		x		Monthly Meetings; Grant Administration
	Miscellaneous Town Technical Assistance	x			Assisted the Town of Bourne to understand the economic implications of commuter rail service
	Complete CEDS Annual Report	x			For continued EDA certification
	EDA Short-term Planning Grant		x		Grant will end Sept. 2015
	Assist Mashpee Wampanoag Tribe with development of a tribal CEDS		x		Signed an MOU with the tribe and agreed on a scope of work
Research	Resident Survey	x			Completed in Fall 2014 – Report issued March 1st 2015
	Water Quality Impacts on Property Values and Distribution of Tax Burden	x			Presented at Wastewater Conference in March 2015

Cape Cod Commission Economic Development Work Plan – Year 1					
Action	Activities	Complete	In Progress	Postponed	Comments
Outreach	Conference	x			Done in collaboration with the SmarterCape Partners
	Reporting on CEDS activities	x			EDC, CCC, County Commissioners, and AOD, etc.
Data Dissemination	STATSCapeCod	x			All tables and charts updated with latest data
	Design Additional Content			x	
Regional Priority Projects – Lead	Wastewater in Economic Centers		x		Completed regional wastewater plan and associated models
	Strategic Information Office		x		Technology audit, regional area network, and extension of e-permitting
RESET	Intensive Multi-disciplinary Town Technical Assistance		x		RESET projects underway in Barnstable, Falmouth, and Orleans

The following table outlines the new work plan for Year 2 of the CEDS implementation including whether this is a new activity or an ongoing activity. This work plan and funding ($290,000) to support it where approved by the Economic Development Council/CEDS Strategy Committee in December 2014. This support amounts to approximately 28% of the total budget, the rest is paid for by the Cape Cod Commission. We hope in future years to obtain EDA funding as an Economic Development District, a designation we received in December 2013.

Cape Cod Commission Economic Development Work Plan - Year 2			
Action	Activities	Status: New or Ongoing	Comments
Economic Development Planning	Update the economic development planning and regulatory sections of the Regional Policy Plan (RPP)	Ongoing	Includes revising the Land Use Vision Map and related thresholds
	Review Developments of Regional Impact, Local Comprehensive Plans, Growth Incentive Zones and Districts of Critical Planning Concern	Ongoing	Bring ED angle to use of special CCC land use planning and regulatory tools
	Coordinate EDC/CEDS Strategy Committee	Ongoing	Monthly Meetings; Grant Administration
	Complete CEDS Annual Report	Ongoing	For continued EDA certification
Research	Environmental Economics Applied Research	Ongoing	
Outreach	Conference	Ongoing	Done in collaboration with the SmarterCape Partners
	Reporting on CEDS activities	Ongoing	EDC, CCC, County Commissioners, and AOD, etc.
Data Dissemination	STATSCapeCod	Ongoing	Regular maintenance and improvements to existing content
	Design Additional Content	New	American Community Survey, State Data, Property Tax data, etc.

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Cape Cod Commission Economic Development Work Plan - Year 2			
Action	Activities	Status: New or Ongoing	Comments
Regional Priority Projects – Lead	Wastewater in Economic Centers	Ongoing	Economic modeling of action scenarios and no action
	Commuter Rail Impact Analysis	New	Buzzards Bay initial terminus for this proposed project
	Expedited Permitting	New	Continue to work with towns to streamline local permitting through improved zoning and work on GIZ and Chapter H designations
	Cape Cod Capital Trust Fund	New	Develop framework for a regional infrastructure grant and loan fund
	Strategic Information Office	Ongoing	E-permitting, Integrated Infrastructure Planning, Continued development of Regional Database; Collaborate with IT to maintain Interisle Consulting analysis
RESET	Intensive Multi-disciplinary Town Technical Assistance	Ongoing	Identify development and redevelopment impediments and opportunities in areas designated for growth

EVALUATING THE REGIONAL PRIORITY PROJECTS

Regional Priority Project Name	Project Goal	Estimated Year for meeting Goal	Estimated Percent Complete
Cape Cod Capital Trust Fund	Fund Established and Operating	2020	20%
Wastewater Infrastructure in Growth Areas	Sewer Services in designated Growth Centers	2040	40%
Integrated Infrastructure Planning	Regional Infrastructure Plan	2017	5%
Commuter Rail Impact Analysis	Complete region-wide impact analysis	2017	25%
SIO Regional Services	E-permitting in all 15 towns	2025	25%
Climate Change Impacts	Completed assessment of economic impact	2018	25%
Last Mile Broadband	Open-Cape dominant provider of broadband in region	2025	15%
Business Dev. Revolving Loan	Loan fund established and operating	2020	5%
Expedited Permitting	New development locates in Growth Centers and not outside	2030	30%
Harbor Planning	Completed Planning Study	2018	0%

CAPE COD COMMISSION

1. Cape Cod Capital Trust Fund for infrastructure financing

Funding would be sought to establish a Cape Cod Capital Trust Fund, a revolving loan fund to finance infrastructure development particularly in the areas of wastewater, telecommunications, and renewable energy.

Long-term Measures of Success	Quantitative: • Trust Fund Balance • Number of Loans Issued • Interest Rate • Infrastructure designed and constructed • Nitrogen reductions in sensitive embayments • Amount of energy from renewable resources • Last-mile OpenCape connections
	Qualitative: • Stronger partnership between the county and the towns

Project Status: The Cape Cod Commission and the Barnstable County Wastewater Collaborative are the lead agencies on this project. They have hired the Sycamore Group, experts in public finance, to complete a feasibility analysis. The analysis seeks to answer the following research questions:

1. What staffing expertise would be needed to administer the Trust Fund?

2. What sort of governance board would be needed to guide the Funds priorities and operations?

3. Would state legislation be needed to establish the Fund or could this be done under the County's existing authority?

4. What would be an optimal fund balance needed to provide meaningful loans to communities or districts for the purposes outlined above?

5. What financing tools would be the most appropriate → revolving loan fund, loan guarantees, other?

6. Are there case studies of similar entities being established at such a small regional scale?

The feasibility analysis will be completed by the end of June 2015.

2. Wastewater infrastructure and planning for identified growth areas

Funding would be sought from the US Economic Development Administration and other federal, state, and regional sources to design and build capital infrastructure for wastewater treatment serving regionally identified growth areas.

Long-term Measures of Success	Quantitative: • Number of interventions built to reduce nitrogen in sensitive watersheds • Nitrogen concentrations in sensitive embayments • Number of businesses served by nitrogen reducing wastewater treatment systems
	Qualitative: • Increased partnerships between the county and towns • Increased town to town partnerships

Project Status: The Cape Cod Commission is the lead agency on this project working closely with the 15 towns that make up Barnstable County, the State Department of Environmental Protection (DEP), and the US Environmental Protection Agency (EPA). The major milestone achieved over the past year is the submission of an updated Section 208 Water Quality Plan to Mass DEP and the US EPA and the designation of towns as Waste Treatment Management Agencies responsible for reducing the flow of nitrogen to Cape embayments. The Commission is also working with stakeholders to establish a water quality monitoring program that will track the effectiveness of different approaches to reducing nitrogen. The 208 plan can be found at: http://cape2o.org/.

3. Integrated infrastructure planning

Staff time and funding will be dedicated to developing a system for coordinating infrastructure upgrades that include road openings and to facilitate the efficient burying of utility lines.

Long-term Measures of Success	Quantitative: • Miles of Utility lines buried • Number of road openings and services addressed by road openings • Cost of infrastructure maintenance over time
	Qualitative: • Improve partnerships between towns and various utilities • Advance asset management efforts by towns • Improve county-town partnerships

Project Status: The Cape Cod Commission worked in partnership with the towns to complete a fly over to photograph the entire region in order to have a complete planimetric dataset for GIS with which towns and the region can better plan and coordinate infrastructure management. In addition, the Commission is currently working with the Town of Orleans to estimate the value and cost of placing utilities underground in their town center to reduce storm damage and improve community character.

4. Commuter rail impact analysis

CEDS stakeholders have identified the provision of commuter rail between Cape Cod and Boston as a high priority – this project would investigate the economic, transportation, and land use impacts of commuter service on Cape Cod.

Long-term Measures of Success	Quantitative: • Report for distribution to towns, rail providers, chambers and public decision makers • Availability of Commuter Rail and frequency
	Qualitative: • Partnerships between towns, county, and chambers of commerce • Information to developers about opportunities afforded by potential rail services • Information for Public policy makers on the pros and cons of developing commuter rail to the Cape

Project Status: CEDS stakeholders identified commuter rail between Cape Cod and Boston as a high priority and thus included a project in the CEDS to analyze the economic, transportation, and land use impacts of commuter rail service on Cape Cod. This work was initiated with the completion of the Buzzards Bay Commuter Rail Extension Local Impact Report in April 2015. The study included:

- Two detailed parking scenarios were developed.
- Intersection traffic impacts were evaluated at Academy Drive/Main Street, the entrance and exits to the parking areas, and St. Margaret's Street/Main Street
- Traffic impacts on the Main Street corridor between Academy Drive and St. Margaret's Street were evaluated.
- A localized economic analysis based on case studies for commuter rail was prepared.
- Public outreach was performed by presenting materials at Bourne Transportation Advisory Committee meetings, who reports to the Bourne Board of Selectmen, and through local newspaper articles.
- A parking policy including access to the Army Corps Canal Viewing lot, on-street parking, and other existing parking lots is discussed.
- Assessment estimates for the Town of Bourne were received from the MBTA and MassDOT in the case that the town is admitted to the assessment district or if service is extended to Buzzards Bay.

5. Strategic Information Office regional services

The Strategic Information Office of the Cape Cod Commission will apply staff time and resources to the identification and pursuit of regionalized services, including e-permitting, which increase efficiencies and decrease costs to municipalities on Cape Cod.

Long-term Measures of Success	Quantitative: • Number of services provided • Number of towns participating • Reduction in total costs for services
	Qualitative: • Partnerships between the county and the towns • Town to town collaboration

Project Status: The Commission continues to support the establishment of a region-wide e-permitting system. Thus far 4 towns have or are in the process of establishing e-permitting programs for building and other local permits. The Commission and the County have also provided technical and financial support to towns to establish a Regional Area Network. All but one town is participating in this project. The regional GIS database continues to be built and the Commission is working with ESRI and the Towns on a joint licensing program. The Strategic Information Office has also updated its inventory of local IT infrastructure to identify other areas that could benefit from regional coordination.

6. Climate change economic impacts assessment

Funding will be sought to support planning for resiliency to climate change and understanding the economic impacts of no action.

Long-term Measures of Success	Quantitative: • Towns participating in the planning process • Economic Assets identified and mitigation efforts undertaken to protect the asset
	Qualitative: • Improved coordination among governmental units • Faster response time in a disaster event

Project Status: The Cape Cod Commission has developed a sea level rise viewer using GIS to help towns understand the impact of climate change on key infrastructure as well as homes and businesses in order to assist local decision-makers in adopting climate change mitigation and adaptation strategies for critical transportation infrastructure. The Cape Cod Commission provides technical assistance to towns to develop local Multi-hazard Mitigation Plans to FEMA. Seven towns have completed plans thus far out of fifteen.

7. Last mile broadband build-out

The OpenCape middle-mile network, funded through federal and state grants, has been completed. Funding will be sought to complete a regional area network for municipalities and encourage last-mile build out to areas designated for growth.

Long-term Measures of Success	Quantitative: • Number of last-mile connections achieved • Cost of connections

	Qualitative: • Collaboration between County and towns • Competition with Comcast and Verizon

Project Status: The Commission and the County have also provided technical and financial support to towns to establish a Regional Area Network. All but one town is participating in this project. The Cape Cod Technology Council is working closely with Open Cape to understand how best to link the Open Cape middle-mile broadband with homes and businesses (the last mile).

8. Business development revolving loan fund

Funding will be sought from the Economic Development Administration to seed a new revolving loan fund for small business and entrepreneurial development.

Long-term Measures of Success	Quantitative: • Increase in income for loan recipients • Jobs created by loan recipients
	Qualitative: • Sense of empowerment and increased creativity • Increased consumer choice

Project Status: Commission reached out to Coastal Community Capital and Community Development Partnership about applying to EDA to fund a revolving loan program. Unfortunately, at this time neither of these entities or the County can provide the required 50% match and have some concerns about the cost of administration and reporting. Over the next year Commission staff will look into match options and collect data on the need for an additional loan fund.

9. Expedited permitting in identified growth areas

The Commission will work actively with Towns to improve regional and local permitting processes in areas identified for growth through the use of regional tools (Growth Incentive Zones and Flexible Review Thresholds) and the revision of local zoning to promote well designed and appropriately sited development.

Long-term Measures of Success	Quantitative:	
		• New business development in strategic industries • Business development in growth centers • Reduction in commercial sprawl • Job creation
	Qualitative:	
		• Collaborations between county and towns • Public participation and understanding of development challenges and opportunities on Cape Cod

Project Status: The Cape Cod Commission is currently working with the towns of Barnstable, Orleans, and Mashpee to revise local zoning in order to stimulate redevelopment consistent with the region's economic development and land use goals. The Commission is also working with the Town of Mashpee to raise regional regulatory review thresholds for high value added, high wage businesses in the town's industrial park. The Commission has already done this in the towns of Bourne, Falmouth, and Sandwich.

10. Regional Harbor Planning and Infrastructure Evaluation

Funding will be sought by the Commission and other regional partner agencies to support regional and local planning to maintain active fishing harbors and fishing assets for both commercial and recreational fishing.

Long-term Measures of Success	Quantitative:	
		• Size of the Commercial Fishing Fleet • Size of the Commercial Catch by species • Jobs created and retained • Number of water access points serving fishing fleet and recreational fishing
	Qualitative:	
		• Maintain traditional industry the defines the Cape as a special place • Increase awareness of the importance of the fishing industry to Cape Cod

Project Status: Project has not been initiated yet.

CAPE COD COMMISSION

Appendices

2015 Annual Report

CAPE COD COMMISSION

Table of Appendices

CAPE COD
COMMISSION

CAPE COD COMMISSION

Appendix 1: Economic Development District Designation Letter

UNITED STATES DEPARTMENT OF COMMERCE
Economic Development Administration
Washington, D.C. 20230

December 19, 2013

Mr. Paul Niedzwiecki
Executive Director
Cape Cod Commission
3225 Main Street
Post Office Box 226
Barnstable, MA 02630

Dear Mr. Niedzwiecki:

I am pleased to inform you that the U.S. Economic Development Administration (EDA) has approved the Cape Cod Economic Development District's request for designation as an Economic Development District (EDD). The EDD is comprised of the 15 towns located within Barnstable County.

President Obama is committed to ensuring that no community or demographic group is excluded from the opportunity to achieve the American Dream. To that end, this EDA designation will serve as a foundation for future economic successes that will benefit both families and businesses in your region. EDA is committed to providing financial assistance to meet the economic development needs of distressed communities throughout the United States. Our mission is to lead the federal economic development agenda by promoting innovation and competitiveness, preparing American regions for growth and success in the worldwide economy.

I trust that this designation will strengthen the economies of the Cape Cod region, and wish you every success in carrying out your economic development activities. Bill Good, of EDA's Philadelphia regional office, will remain your primary point of contact regarding this designation and may be contacted by telephone at (215) 597-0505, or email at www.wgood@eda.gov.

Your ongoing efforts to stimulate growth and business expansion through local economic development programs are greatly appreciated.

Sincerely,

Matthew S. Erskine
Deputy Assistant Secretary of Commerce
for Economic Development
and Chief Operating Officer

Enclosure

UNITED STATES DEPARTMENT OF COMMERCE
Economic Development Administration
Washington, D.C. 20230

MEMORANDUM OF DESIGNATION OF AN ECONOMIC DEVELOPMENT DISTRICT

In accordance with Section 401 of the Public Works and Economic Development Act of 1965, as amended (42 U.S.C. 3171 et seq.), I hereby designate the region identified below as an Economic Development District:

Name of District Organization	Cape Cod Economic Development District
State	Massachusetts
Regional Definition	Barnstable County, consisting of the towns of Barnstable, Bourne, Brewster, Chatham, Dennis, Eastham, Falmouth, Harwich, Mashpee, Orleans, Provincetown, Sandwich, Truro, Wellfleet, and Yarmouth.

Matthew S. Erskine
Deputy Assistant Secretary of Commerce
for Economic Development
and Chief Operating Officer

Date: December 19, 2013

Appendix 2: CEDS Strategy Committee Agendas & Minutes

Cape Cod Economic Development Council

Monthly Meeting Agenda

Date: June 4, 2015
Time: 5:00 pm
Location: Cape Cod Commission
3225 Main Street, Barnstable, MA 02630

1. Board Minutes
   - Approval of May 7, 2015 draft minutes

2. Council Chair's Report

3. Finance Committee: *Paul Rumul*
   - Discussion and potential vote to eliminate the budget line item for the reserve fund
   - Discussion of timeline for FY16 budget submission to County Finance

4. Grant Committee: *Felicia Penn*
   - Discussion of proposed grant round with regard to available funds, timeline, and areas of interest

5. CEDS Implementation Update: *Leslie Richardson*
   - Discussion and potential vote for approval of draft FY15 Comprehensive Economic Development Strategy (CEDS) Annual Report for submission to the Economic Development Administration

6. Topics not reasonably anticipated by the Chair prior to the time of posting notice

Attachments:
Draft minutes from May 7, 2015
Draft FY15 CEDS Annual Report

If you are deaf or hard of hearing or a person with a disability who requires an accommodation, contact the Cape Cod Commission at 508-362-3828 or TTY 508-362-5885. Notice of at least 24 hours prior to the meeting is helpful.

Caso estas informações sejam necessárias em outro idioma, por favor, contate o Coordenador de Título VI da MPO pelo telefone 508-362-3828.

Cape Cod Economic Development Council

Monthly Meeting Agenda

Date: May 7, 2015
Time: 5:00 pm
Location: Cape Cod Commission
3225 Main Street, Barnstable, MA 02630

1. Board Minutes
    - Approval of March 26, 2015 minutes

2. Council Chair's Report, Felicia Penn
    - Speaker: Chris Duren, Home Builders & Remodelers Association
    - Summary of May 6, 2015 SmarterCape Summit on Housing

3. Finance Committee, Paul Rumul
    - Review and Discussion on Draft FY16 Budget

4. Grant Committee, Felicia Penn
    - Recommendations and Discussion on FY16 Grant Opportunities

5. Comprehensive Economic Development Strategy (CEDS) Implementation, Leslie Richardson
    - Feedback and Suggestions to the draft FY15 Annual CEDS Report

6. Other Business

<u>Attachments:</u>
Draft 3/26/15 minutes
Draft FY15 Annual CEDS Report

If you are deaf or hard of hearing or are a person with a disability who requires an accommodation, contact the Cape Cod Commission at 508-362-3828 or TTY 508-362-5885. Notice of at least 24 hours prior to the meeting is helpful.

Cape Cod Economic Development Council

Monthly Meeting Agenda

Meeting Date: March 26, 2015
Time: 5:00 PM
Location: Conference Room, Cape Cod Commission
3225 Main Street, Barnstable, MA 02630

1. Board Minutes
   - Approval of draft minutes, January 8, 2015

2. Council Chair's Report
   - Discussion: CCEDC "Projects" to fund and roles to play
   - Review of CCC plan for updating the Barnstable County Information Technology Survey
   - Update on Int'l Oyster Symposium 6

3. Council Vice Chair's Report

4. CEDS Implementation Update
   - Discussion on CEDS annual report

5. Other

Attachments:
Draft minutes of January 6, 2015
Background for discussion of projects and roles from AOD Ordinance 98-21
CCC plan for BCITS update
IOS6 Report

Cape Cod Economic Development Council
3225 Main Street, PO Box 226, Barnstable, MA 02630

Minutes, March 26, 2015

Present:
John Kilroy, Barbara Milligan, Felicia Penn, Paul Rumul, Sheryl Walsh, Dan Wolf

Absent:
Ken Cirillo, M. Pat Flynn, Brian Mannal, Rick Presbrey, Richard Roy, Allen White, David Willard

Also Attending:
CCC Staff: Leslie Richardson, Taree McIntyre

Felicia Penn called the meeting to order at 5:00 PM in the conference room of the Cape Cod Commission.

Board Minutes
Upon a motion by John Kilroy, second by Paul Rumul, the minutes of the January 8, 2015, meeting were approved with a revision of the SmarterCape Summit title from *Smart to be Dense* to *Is it Smart to be Dense?*. Dan Wolf abstained from the vote.

CEDS Implementation Update – Discussion on CEDS Annual Report
Leslie Richardson stated that she is preparing the draft annual report for CEDS and is planning on presenting the report to the Council in May for review and, subsequently, an endorsement by the CCEDC in June. Ms. Richardson noted that the report is a sub-document of the Regional Policy Plan with the same goals. Included in the report is the ranking of the priority projects with process measures, the current status of the RESET projects, and the data updates to the StatsCapeCod website.

Review of CCC plan for updating the Barnstable County IT Survey
Ms. Penn referenced the attached email from Kristy Senatori on the process of updating the Barnstable County IT Survey from 2012. There was a brief discussion regarding Barnstable County's role in gathering this information versus an outside contractor which would require funding and how non-participation by the Town of Barnstable could affect regional efforts.

Other

Ms. Penn reviewed the agenda for the May 6th SmarterCape Summit which focuses on Cape Cod's housing issues. Members discussed housing on Cape Cod from the private and public sector perspective and how the tourism industry and second-homeowners affect the Cape's housing market.

Members discussed various ideas for the next grant round with no definitive conclusions.

Members discussed potential funding cuts by the Barnstable County Commissioners to the Arts Foundation from the License Plate Fund.

Update on International Oyster Symposium 6 (IOS6):

Members discussed the difficulty in raising funding for the IOS6 slated for Cape Cod during October, 2015, and the short amount of time left to do so.

The meeting was adjourned at 6:30.

Cape Cod Economic Development Council

Monthly Meeting Agenda

Cape Cod Economic Development Council Meeting

Scheduled
Thursday, March 5, 2014, 5:00 pm

at the
Cape Cod Commission
3225 Main Street, Barnstable, MA 02630

Is Cancelled due to Snow

If

Cape Cod Economic Development Council

Monthly Meeting Agenda

Cape Cod Economic Development Council Meeting

Scheduled
Thursday, February 5, 2014, 5:00 pm

at the
Cape Cod Commission
3225 Main Street, Barnstable, MA 02630

Is Cancelled due to Snow

If

Cape Cod Economic Development Council

Monthly Meeting Agenda

Meeting Date: January 8, 2015
Time: 5:00 PM
Location: Conference Room, Cape Cod Commission
3225 Main Street, Barnstable, MA 02630

1. Board Minutes
    - November 6, 2014 and December 4, 2014

2. Council Chair's Report
    - Guest Speakers – Katherine Garofoli, Dennis Conservation Trust and Mark Robinson, Compact of CC Conservation Trusts
    - December 4th Economic Forum – Next Steps
    - Discussion on mid and final grant report review

3. Council Vice Chair's Report

4. Nominating Committee
    - Election of 2015 Officers

5. Grant Committee
    - Discussion on Spring Grant Round regarding timetable and subject matter

6. Other

Attachments:
Draft minutes from November 6, 2014 and December 4, 2014

Cape Cod Economic Development Council
3225 Main Street, PO Box 226, Barnstable, MA 02630

Minutes, January 8, 2015

Present:
Ken Cirillo, M. Pat Flynn, John Kilroy, Brian Mannal (arrived 5:18), Barbara Milligan, Felicia Penn, Richard Roy, Sheryl Walsh, David Willard

Remote Participation:
Paul Rumul, Allen White

Absent:
Rick Presbrey, Dan Wolf

Also Attending:
CCC Staff: Paul Niedzwiecki, Taree McIntyre
Guest Speakers:
Dennis Conservation Trust: Katherine Garofoli
Compact of Cape Cod Conservation Trusts: Mark Robinson
Senator Wolf's Office: Seth Rolbein
Cape Cod Commercial Fishermen's Alliance: John Pappalardo
Aquaculture Research Center (ARC): Rob Doane

Felicia Penn called the meeting to order at 5:05 PM in the conference room of the Cape Cod Commission. Upon a motion by Sheryl Walsh, second by John Kilroy, the minutes of the November 6, 2014 meeting were approved with the following roll call vote:

Ken Cirillo, yes	John Kilroy, yes	Barbara Milligan, abstain
Felicia Penn, yes	Paul Rumul, yes	Sheryl Walsh, yes
Allen White, abstain	David Willard, abstain	

Upon a motion by Ken Cirillo, second by Allen White, the minutes of the December 4, 2014 meeting were approved with the following roll call vote:

Ken Cirillo, yes	John Kilroy, yes	Barbara Milligan, yes
Felicia Penn, yes	Paul Rumul, abstain	Sheryl Walsh, yes
Allen White, yes	David Willard, yes	

<u>Nominating Committee:</u>
Paul Rumul stated that Felicia Penn and Ken Cirillo agreed to retain their positions as Chair and Vice Chair, respectively, if the Council so voted. David Willard motioned for Felicia Penn to remain Chair and Ken Cirillo to remain Vice Chair for 2015, seconded by Allen White and approved with the following roll call vote:

Ken Cirillo, yes	John Kilroy, yes	Barbara Milligan, yes
Felicia Penn, yes	Paul Rumul, yes	Sheryl Walsh, yes
Allen White, yes	David Willard, yes	

Economic Forum – Next Steps:

Sheryl Walsh reported that 12 of the 15 Cape towns were represented at the Economic Forum in December. The survey results were presented to the group and several towns shared information on current projects and success stories of past endeavors. Sallie Riggs, Executive Director of the Bourne Financial Development Corp., shared the chronology of the Bourne Local Comprehensive Plan (LCP) which sparked the interest of other towns still in the LCP process. Ken Cirillo stated that it was clear that the towns have no information-sharing systems in place and that the towns were very interested in technical assistance offered by the Cape Cod Commission (CCC). Ms. Penn noted that participants were also very interested in Chapter H which allows for revisions to the CCC's Developments of Regional Impact thresholds. Paul Niedzwiecki remarked that most local economic boards have no staff, no policy making authority, and no funding, making it difficult to be effective. Mr. Niedzwiecki initiated a discussion on creating a capital trust fund for infrastructure design and regional priorities. Ms. Penn will schedule a meeting in the spring to devise a plan for the forum follow up.

Mid and Final Grant Report Review:

Ms. Penn stated that the mid-year grant reports from the FY 14 grant round are due January 1, 2015 and the final reports will be due August 30, 2015. Ms. Penn requested volunteers, not including grant committee members, to review the reports in comparison to the submitted proposals. Reviewers will be looking to see if award recipients followed the budget, solved the problem, and achieved success. Reviewers will report back to the grant committee with their conclusions. John Kilroy and Sheryl Walsh agreed to take on this task with Ms. McIntyre providing the proposals and reports.

Guest Speakers on the Chase Garden Creek Conservation Restriction and Aquaculture Research Corporation (ARC):

Katherine Garofoli opened with a power point presentation (attached) introducing the Stakeholder attempt to purchase a conservation restriction on 39.7 acres in Dennis where ARC, the Cape's only shellfish hatchery, is located. The power point includes a list of the Stakeholders, identifies the property, and details the budget necessary to purchase the restriction. Discussion among the guest speakers and Council members included the following factors:

- The MA Office of Energy and Environmental Affairs, Barnstable County, Town of Dennis, Dennis Conservation Trust, and the Yarmouth Community Preservation Committee are working together to raise funds in support of the conservation restriction.
- The cost of the conservation restriction is $3,000,000 and has a deadline of 9/2015.
- The state approved $100,000 for startup in FY15 with another $1,500,000 slated for FY16. These funds could still be diminished by budget cuts.
- The funds supported by the Towns of Dennis and Yarmouth will be on their town warrants to be voted on in the spring.
- The buildings on the property are in total disrepair and must be demolished and rebuilt on the same footprint. The $3,000,000 cost of rebuilding will be funded through private investors and loans.
- The approval of a wind turbine to be built on the property will greatly reduce energy costs.
- The 4 pristine wells located on the property maintain the purity of the seed making it impossible for the business to be relocated.
- The current owners plan to stay on in the hatchery for the best transition results.
- CC Community College is planning to use the facility for added curriculum – vocational, historical, scientific, and marketing.

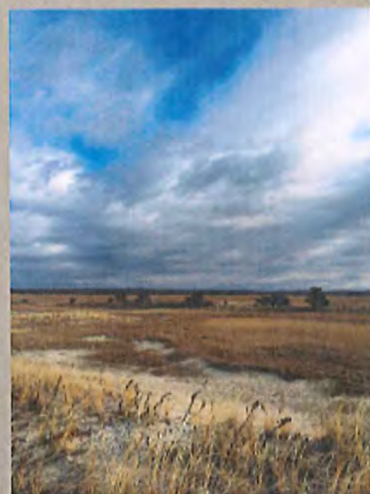
Other:

Ms. Penn announced that the SmarterCape Summit will take place in May at the Hyannis Resort and Conference Center. The theme of this year's Summit will be *Is it Smart to be Dense?* and focus on housing and density.

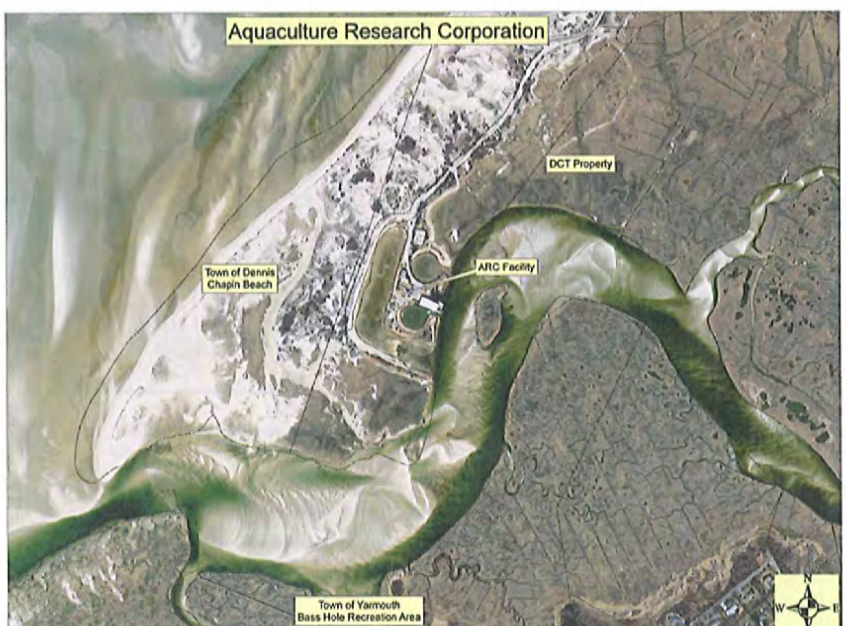
Ms. Penn asked Council members to email her regarding the areas of interest for the next grant round. Ms. Penn suggested that the next grant round could follow the focus of the Summit and deal with housing issues on the Cape or she would consider any ideas offered.

There was a brief discussion of a possible redesign of the county complex and better space usage.

The meeting was adjourned at 6:25 pm.

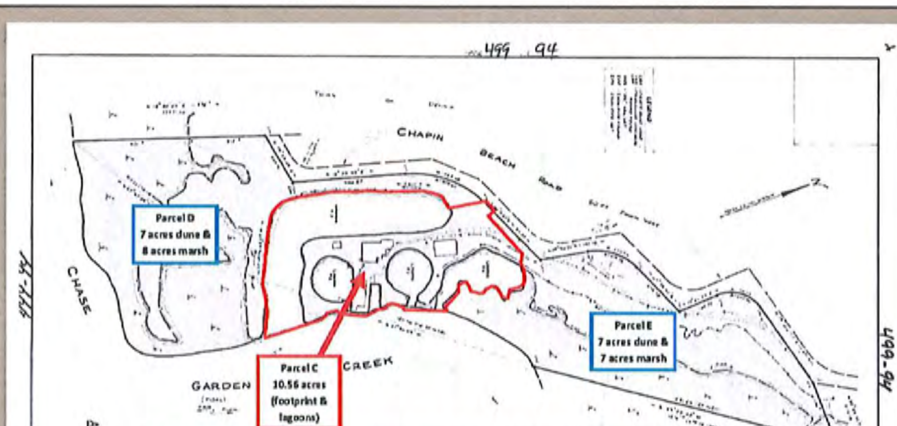


CHASE GARDEN CREEK CONSERVATION RESTRICTION



STAKEHOLDERS

- Town of Dennis
- Dennis Conservation Trust
- County of Barnstable
- The Nature Conservancy
- Town of Yarmouth
- Cape Cod Commercial Fishermen's Alliance
- Commonwealth of Massachusetts
- State Senator Dan Wolf
- Several Private Investors



Final Disposition of 39.7 acres of land owned by ARC—Proposed for Sept. 2015:

1. ARC would sell a perpetual Conservation Restriction (CR) to the Townof Yarmouth/Barnstable County/DCT for$3 million on all 39.7 acres, limiting the use of Parcels D & E to conservation and passive recreation, and Parcel C to aquacultural use.
2. Parcel C, including the buildings, four lagoons and 50 feet of frontage on Chapin Beach Road (Town way, paper road), would be transferred to "ARC 2.0", subject to the CR held by the Yarmouth and County or DCT.
3. Parcels D & E (29 acres total) would be sold to the Town of Dennis Conservation Commission subject to the CR held by Yarmouth/County/DCT.
4. Acreage estimates to be confirmed by field survey in 2015.

Prepared by M. H. Robinson for Dennis Conservation Trust & Barnstable County. Nov 2014

BUDGET

Conservation Restriction for the 39.7-acre ARC parcel
$3,000,000

GRANT NAME/ORGANIZATION	DATE APPLIED	AMOUNT REQUESTED	STATUS OF YOUR APPLICATION	DATE GRANT IS AWARDED
MA EXECUTIVE OFFICE OF ENERGY AND ENVIRONMENTAL AFFAIRS	JUNE, 2014	$1.6 M	APPROVED	2/1/15 ($100,000) 7/1/2015 ($1.5M)
BARNSTABLE COUNTY	DECEMBER 2014	$250,000	PENDING	7/1/2015
TOWN OF DENNIS	MAY, 2015	$300,000 (+/-)	PENDING	
DENNIS CONSERVATION TRUST	OCTOBER, 2014	$475,000 (+/-)	FUND DRIVE UNDERWAY	ROLLING
YARMOUTH CPC	DECEMBER 2014	200,000	PENDING	5/2015

Thank you!
Questions?

Cape Cod Economic Development Council

Monthly Meeting Agenda

Meeting Date: December 4, 2014
Time: 7:30 am
Location: **Harborview Room, Barnstable County Campus**
3195 Main Street, Barnstable, MA 02630

1. Board Minutes
   - Potential vote of November 6, 2014 minutes (if available)

2. CEDS Implementation Update
   - Review and potential vote of Cape Cod Commission Draft FY16 Work Plan

3. Other

If you are deaf or hard of hearing or are a person with a disability who requires an accommodation, contact the Cape Cod Commission at 508-362-3828 or TTY 508-362-5885. Notice of at least 24 hours prior to the meeting is helpful.

Cape Cod Economic Development Council
3225 Main Street, PO Box 226, Barnstable, MA 02630

Draft Minutes, December 4, 2014

Present:
Ken Cirillo, John Kilroy, Barbara Milligan, Felicia Penn, Sheryl Walsh, Allen White, David Willard

Absent:
M. Pat Flynn, Brian Mannal, Rick Presbrey, Richard Roy, Paul Rumul, Dan Wolf

Also Attending:
CCC Staff: Leslie Richardson, Taree McIntyre

Felicia Penn called the meeting to order at 7:35 am in the Harborview Room of the Barnstable County Campus. Ms. McIntyre verified that the draft minutes from the November 6, 2014 meeting were not available to vote.

CEDS Implementation Update:

Review and vote of Cape Cod Commission (CCC) Draft FY16 Work Plan
Felicia Penn, Chair, stated that one EDC Member had responded with questions regarding the CCC FY16 Work Plan and those questions were addressed satisfactorily by the CCC in an email sent to the full council. Ms. Penn also stated that the CCC revised the work plan at her request to include a commitment to keep the information up-to-date from the Barnstable County Information Technology Systems audit by Interisle Consulting of 2012.

Upon a motion by Allen White, second by David Willard, and approval by all, the Cape Cod Economic Council voted to recommend to the County Commissioners that License Plate Revenue fund the proposed FY16 Economic Development Work Plan of the Cape Cod Commission in an amount up to $290,000.00 for programming and administrative expenses. The amount equals level funding with last year.

Other:
Members had a brief discussion regarding the addition of an Environmental Economist, Dr. Mahesh Ramachandran, to the CCC staff. Dr. Ramachandran will be quantifying impacts of water quality on property values and working with the EPA on a systems model as part of the 208 Water Quality Plan. This discussion led into a conversation on the emerging co-existence of Cape Cod Community College and Bridgewater State University.

The meeting was adjourned at 7:50 am.

Cape Cod Economic Development Council

Monthly Meeting Agenda

Meeting Date: November 6, 2014
Time: 5:00 PM
Location: Conference Room, Cape Cod Commission
3225 Main Street, Barnstable, MA 02630

1. Board Minutes
   - Approval of draft Minutes of October 2, 2014 Meeting

2. Council Chair's Report
   - Guest Speaker: Paul Parker – Director, CC Fisheries Trust

3. Council Vice Chair's Report
   - Economic Development Forum Update

4. Nominating Committee
   - Vote on 4 Term Renewals

5. CEDS Implementation Update
   - Review of CCC Draft FY16 Work Plan

6. Other

<u>Attachments:</u>
Draft Minutes of October 2, 2014 Meeting

Cape Cod Economic Development Council
3225 Main Street, PO Box 226, Barnstable, MA 02630

Minutes, November 6, 2014

Present:
Ken Cirillo, John Kilroy, Brian Mannal, Felicia Penn, Rick Presbrey, Richard Roy, Paul Rumul, Sheryl Walsh, Dan Wolf

Absent:
M. Pat Flynn, Barbara Milligan, Allen White, David Willard

Also Attending:
CCC Staff: Paul Niedzwiecki, Kristy Senatori, Leslie Richardson, Taree McIntyre
CC Commercial Fishermen's Alliance: John Pappalardo, CEO
Paul Parker, Director, CC Fisheries Trust

Felicia Penn called the meeting to order at 5:03 PM in the conference room of the Cape Cod Commission. Upon a motion by Ken Cirillo, second by Brian Mannal, the minutes of the October 2, 2014 meeting were approved. Paul Rumul and Rick Presbry abstained from the vote.

Economic Forum Update:
Sheryl Walsh reported that 24 people responded to the economic survey released in October. Additional response time has been added for five towns that did not respond to the survey. The planning committee is compiling the survey data and an agenda for the December 4th forum will be noticed in two weeks. Ms. Penn announced that the December 4th, 5:00 pm, monthly meeting of the CCEDC is cancelled due to the economic forum on the same date.*

Nominating Committee:
Paul Rumul noted that member terms are expiring December 31, 2014, for Ken Cirillo, Brian Mannal, Sheryl Walsh, and Dan Wolf. All were contacted and wish to remain on the Council. Paul Rumul motioned to recommend to the Barnstable County Commissioners, the reappointment of Ken Cirillo, Brian Mannal, Sheryl Walsh, and Dan Wolf, each to new 3 year terms that will begin January 1, 2015 and run through December 31, 2017, seconded by Rick Presbrey, and approved by all.

Mr. Rumul stated that there have been suggestions to create ex-officio positions for Senator Dan Wolf and Representative Brian Mannal because of the difficulty in attending meetings due to their schedules in the state legislature. Mr. Rumul explained that creating the positions would require an amendment to the ordinance governing the CCEDC. A discussion resulted in the decision to not pursue the ex-officio positions. Ms. Penn reminded everyone that remote participation is always an option and should be prearranged.

*Ms. Penn later called for a 7:30 am meeting on December 4, 2014, before the economic forum.

John Pappalardo and Paul Parker of the Cape Cod Fishermen's Alliance joined the EDC for an update on the fishing industry on Cape Cod. The attached presentation began with a brief history of the industry and the over-fishing which led to the depletion of many species. The initiation of a quota system was established to rebuild stock but purchasing a quota is expensive. The Alliance has been able to purchase quotas that are then leased to local fishermen. Up-to-date science and technology information is critical for the management of the fishing industry. The current system allows for the maximum sustainable yield for each species to increase stock. The Alliance flash freezes a variety of fish for donation to food pantries between the Cape and Boston.

<u>CEDS Implementation Update:</u>

Review of CCC Draft FY16 Work Plan

The EDC has provided support to the Cape Cod Commission for the implementation of the Cape Cod Comprehensive Economic Development Strategy over the past five years. In the context of considering funding for an additional year of CEDS implementation, Paul Niedzwiecki presented a sampling of the work of the Commission made possible by EDC support.* The presentation focused on the RESET program and how these local-regional collaborations are able to overcome economic development obstacles resulting in real changes on the ground and informed regional planning efforts. Zoning changes, regional regulatory changes, public investment, and private investment leading to new jobs in export industries have all resulted from the RESET program. After some discussion of the presentation, Leslie Richardson distributed the proposed FY16 budget for CEDS implementation, 26.3% of which is being requested from the EDC ($290,000). Members were asked to review the proposal and submit questions to the Chair in preparation for a potential vote at the next meeting.

The meeting was adjourned at 6:36 pm.

*The presentation will also serve as the mid-term report for the CCC grant funding the FY2015 Work Plan.

Motion: "To recommend to the Barnstable County Commissioners the reappointment of Kenneth Cirillo, Brian Mannal, Sheryl Walsh, and Daniel Wolf, each to new 3 year terms that will run from January 1, 2015 through December 31, 2017"

Cape Cod Fisheries Trust

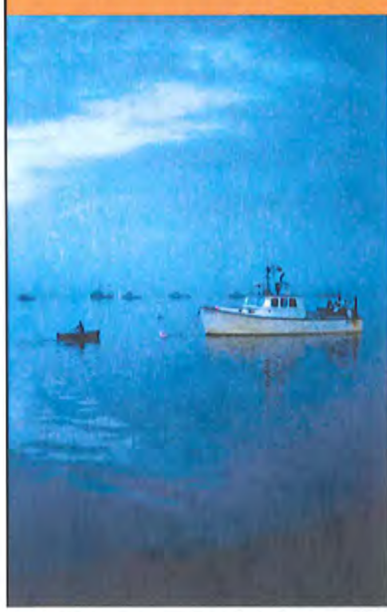
John Pappalardo, CEO
CC Fishermen's Alliance

Paul Parker, Director
Cape Cod Fisheries Trust

Thursday Nov. 5, 2014

CAPE COD FISHERIES TRUST

Our Fishing Community



- Fishing matters on Cape Cod
- A sense of place
- Independent family businesses
- Fresh local seafood
- Diverse natural resources
- Good Cape Cod jobs
- Sustainable fishing
- It's about the people

New England Fishery Crisis

- 1976 Magnuson Stevens Act
- Replace foreign fleet
- 1990s stock collapse
- Failed complex regulations
- Bycatch & overfishing
- Less profit & Fewer jobs
- Community loss
- Stronger revisions to federal law

Quota Transition (Catch Shares)

- Cap and trade system
- Annual science-based quotas
- Allocated to fishermen
- For sale or lease
- Increased accountability
  - Vessel tracking
  - Daily catch reporting
  - Daily dealer reporting
  - Observers & monitoring

Community Challenges

- Rising quota prices
- High lease costs
- Quota scarcity
- Lack of quota financing
- Lower crew pay
- Deferred maintenance
- Species specialization
- No access to capital
- Fishermen not prepared
- Loss of hope

Cape Cod Fisheries Trust

We run a non-profit business:

- Buys quota from retiring fishermen
- Leases quota to Cape Cod fishermen at affordable rates (50% of market price)
- Helps local fishermen improve their businesses
- Bring fishermen together to work as a team

Outcomes & Guiding Principles

Expected Outcomes:

- Strong Cape Cod fishing economy
- Bankable fishing businesses
- Profits for captains
- Fair compensation for local crew
- Diversified fishing businesses
- Sustainable fishing practices

Guiding principles:

- Support new generations of fishermen
- Provide services for business improvement
- Value hard work
- Bring fleet together as a team

Who's Eligible

- Cape Cod resident
- Use Cape Cod ports
- Hire local crew
- Participation
- Sustainable fishing
- Owner-operator fishermen
- Comply with monitoring
- Comply with regulations
- Lease compliance

CCFT's community model promotes the ability to implement healthy fishing practices for the environment and local economy

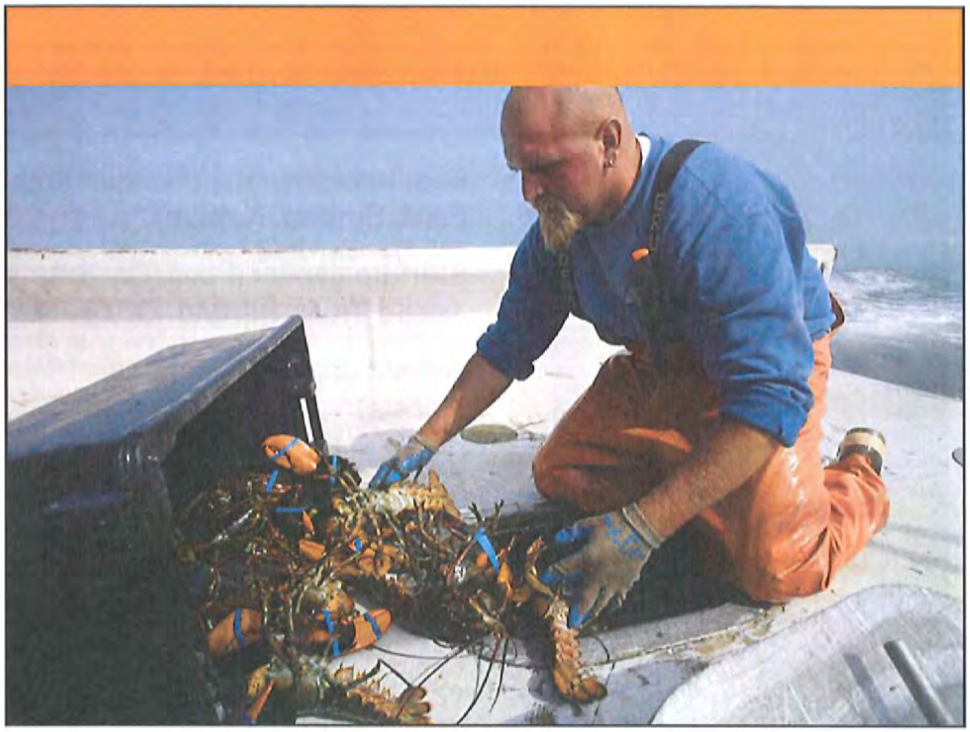
Investors' Role in Our Success

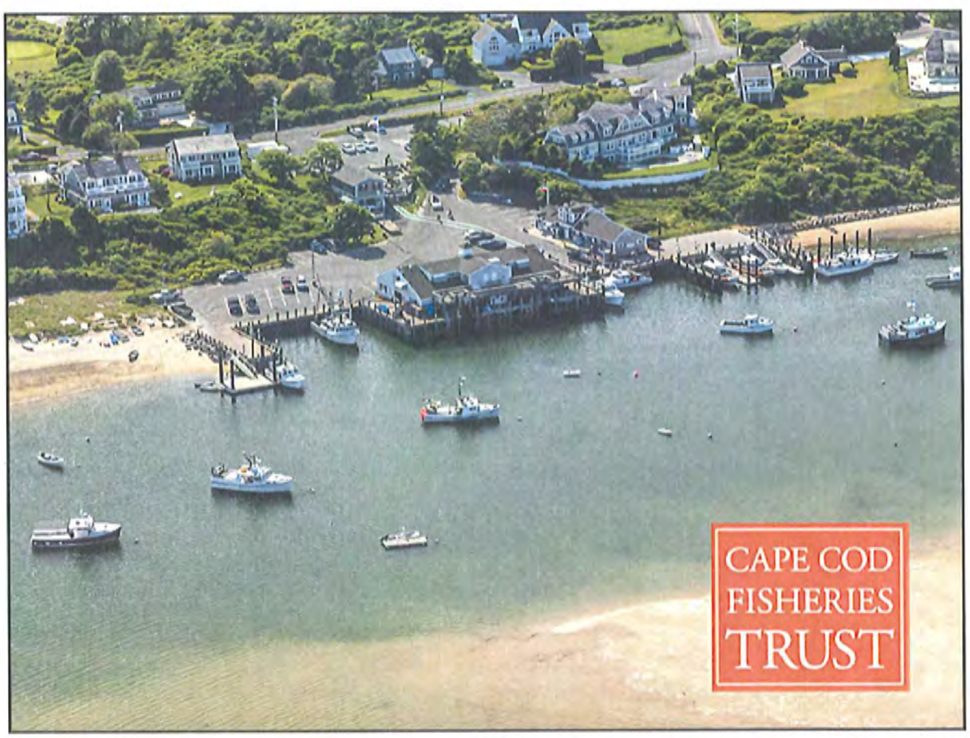
- Business planning (Foundations Ford, Surdna, Kaplan)
- Start-up capital (Ford, Calvert, Jane's Trust, Surdna, CC5)
- Growth capital (Campbell, Marisla)
- Business stability (Moore, Walton, Marisla)

"Without the Trust, we'd be gone" Bruce Kaminski
"Without impact investors, there'd be no Trust" Paul Parker

Community Impacts

- Anchors an industry
- 40 fishing vessels
- 100-120 fishing families
- 600K – 1.2M pounds
- \$1.9 - \$3.8M annually
- Team building
- Better businesses
- Increasing leverage
- Delivers hope




CAPE COD
FISHERIES
TRUST

DRAFT - Cape Cod Commission Economic Development Work Plan FY2016						
Action	Activities	Consultant/ Staff	Funding Source	Comments	% Time	Cost
Economic Development Planning	Update the economic development planning and regulatory sections of the Regional Policy Plan (RPP)	Staff	CCC	Includes revising the Land Use Vision Map and related thresholds	30%	57,408
	Review Developments of Regional Impact, Local Comprehensive Plans, Growth Incentive Zones and Districts of Critical Planning Concern	Staff	CCC	Bring ED angle to use of special CCC land use planning and regulatory tools	10%	19,136
	Coordinate EDC/CEDS Strategy Committee	Staff	EDC/CCC	Monthly Meetings; Grant Administration	50%	53,040
	Complete CEDS Annual Report	Staff	CCC	For continued EDA certification	20%	38,272
Research	Environmental Economics Applied Research	Staff	CCC		100%	191,360
Outreach	Conference	Staff	EDC/CCC	Done in collaboration with the SmarterCape Partners	40%	76,544
	Reporting on CEDS activities	Staff	CCC	EDC, CCC, County Commissioners, and AOD, etc.	30%	57,408
Data Dissemination	STATSCapeCod	Consultant	EDC/CCC	Regular maintenance and improvements to existing content	20%	38,272
	Design Additional Content	Staff/ Consultant	CCC	American Community Survey, State Data, Property Tax data, etc.	5%	8,424
Regional Priority Projects – Lead	Wastewater in Economic Centers	Staff/ Consultant	EDC/CCC	Economic modeling of action scenarios and no action	25%	47,840
	Commuter Rail Impact Analysis	Staff/ Consultant	EDC/CCC	Buzzards Bay initial terminus for this proposed project	30%	57,408
	Expedited Permitting	Staff/ Consultant	EDC/CCC	Continue to work with towns to streamline local permitting through improved zoning and work on GIZ and Chapter H designations	25%	47,840
	Cape Cod Capital Trust Fund	Staff/ Consultant	EDC/CCC	Develop framework for a regional infrastructure grant and loan fund	65%	124,384
	Strategic Information Office	Staff/ Consultant	EDC/CCC	E-permitting, Integrated Infrastructure Planning, Continued development of Regional Database	50%	95,680
RESET	Intensive Multi-disciplinary Town Technical Assistance	Staff	EDC/CCC	Identify development and redevelopment impediments and opportunities in areas designated for growth	100%	191,360
					5.70	1,104,376

In addition to funds allocated here, economic development initiatives leverage funds from the Massachusetts Department of Transporation; Massachusetts Department of Housing & Community Development, Massachusetts Department of Administration, Federal Transit

Economic Development Program Budget

Expenses

Economic Development Planning	15.2%	167,856
Research	17.3%	191,360
Outreach	12.1%	133,952
Data Dissemination	4.2%	46,696
Regional Priority Projects – Lead	33.8%	373,152
RESET	17.3%	191,360
TOTAL	100.0%	1,104,376

Funding

EDC TOTAL	26.3%	290,000
EDA	0.0%	-
CCC	73.7%	814,376
TOTAL	100.0%	1,104,376

Cape Cod Economic Development Council

Monthly Meeting Agenda

Meeting Date: October 2, 2014
Time: 5:00 PM
Location: **Innovation Room, Open Cape Building**
3195 Main Street, MA 02630

1. Board Minutes

2. Council Chair's Report:
   - Guest Speaker: David Augustinho, Executive Director
     C&I Workforce Investment Board

3. Council Vice Chair's Report
   - Update on December Economic Forum

4. Nominating Committee
   - Update on member terms

5. CEDS Implementation Update:
   - Update on current RESET projects

6. Other

Attachments:
Draft minutes – September 12, 2014

If you are deaf or hard of hearing or are a person with a disability who requires an accommodation, contact the Cape Cod Commission at 508-362-3828 or TTY 508-362-5885. Notice of at least 24 hours prior to the meeting is helpful.

Cape Cod Economic Development Council
3225 Main Street, PO Box 226, Barnstable, MA 02630

Minutes, October 2, 2014

Present:
Ken Cirillo, M. Pat Flynn, John Kilroy, Brian Mannal, Felicia Penn, Richard Roy, Sheryl Walsh, Allen White

Absent:
Barbara Milligan, Rick Presbrey, Paul Rumul, David Willard, Dan Wolf

Also Attending:
CCC Staff: Leslie Richardson, Taree McIntyre; Guest Speaker: David Augustinho, C&I Workforce Investment Board

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Felicia Penn called the meeting to order at 5:05 PM in the Innovation Room of the Open Cape Building. Upon a motion by Ken Cirillo, second by Allen White, the minutes of the September 12, 2014 meeting were approved.

Update on December Economic Forum:
Responding for Ken Cirillo, Taree McIntyre updated members on the status of the December Economic Forum. Ms. McIntyre confirmed that the forum save-the-date notice was released on September 18th to representatives of each town, who would then forward it to their economic and planning organizations. The towns have not been forthcoming with contact information for their volunteer committees and prefer to have documents forwarded through the town planners. As suggested by Senator Wolf, the Cape Delegation was added to the list of participants. Few people have RSVP'd but Ms. McIntyre believes they are waiting to review the subject matter of the pre-forum survey. Following the established timeline, the survey is still slated to be released October 6th with a deadline to submit by October 22nd.

Council Chair's Report:
Ms. Penn introduced David Augustinho, Executive Director of the C&I Workforce Investment Board, to speak about the Cape's economy as it relates to workforce training and available resources for jobs with sustainable living wages. Mr. Augustinho provided a packet of statistical economic information (attached) to be reviewed by members at their convenience. This discussion included the following observations:

- The Cape continues to be mostly service based in the retail and hospitality fields.
- The establishment of more one-stop career centers could play a key role in training for mid-level careers.
- There is a lack of managerial training on Cape Cod for retail and start-ups.
- Opportunities exist in mid-level healthcare positions but a lack of clinical sites and barriers in the certification/licensing regulations present challenges.

- The new Cape Cod location of Bridgewater State University will increase opportunities in certificate and professional development courses. Courses will be limited to the current curriculum offered at Bridgewater.
- The current administration of Cape Cod Community College has fostered opportunities in middle-skill positions, particularly in computer and technical programs. The Open Cape network may provide advantages in technology job growth.
- The Cape Cod Community College grant for an accelerated program in aviation maintenance and certification will afford new skill opportunities but may not affect job growth in that area.
- Many training programs are mostly utilized by the already-employed to increase their skills and do not necessarily create new jobs.

CEDS Implementation Update on RESET Projects:
Barnstable Reset
Leslie Richardson reported that the Cape Cod Commission (CCC) and Town of Barnstable are working together to consider local and regional regulatory changes that might stimulate the redevelopment of the four regional retail centers (the Cape Cod Mall, Capetown Plaza, Southwind Plaza, and Festival Plaza) along Iyannough Road (Rte. 132) .

Orleans Reset
Ms. Richardson stated that the Town of Orleans requested assistance with a RESET project on Route 6A from Brewster to Eastham. CCC staff will meet with the Orleans Planning Board to identify areas that need improvement and to discuss the specifics of their vision for the corridor.

Nominating Committee:
Ms. Penn stated that Paul Rumul was unable to attend and the nominating report will be continued to the next meeting.

Other:
Ms. Penn requested that Ms. Richardson have the FY2016 Cape Cod Commission Workplan available by the December meeting.

John Kilroy noted that he has been impressed by the successes of BackOffice Associates, Harwich, MA, and would be interested in having Patricia Kennedy, Co-Founder, as a guest speaker.

Ms. Penn announced that the next meeting will be November 6th, 5:00 pm, in the Cape Cod Commission conference room. The meeting was adjourned at 6:05.

Cape Cod Economic Development Council

Monthly Meeting Agenda

Meeting Date: September 12, 2014
Time: 7:30 Am
Location: Innovation Room, Open Cape Building
3195 Main Street, Barnstable, MA 02630

1. Board Minutes
   - Approval of August 8, 2014 minutes
2. Council Chair's Report
   - Guest speaker, Senator Dan Wolf – Economic Development at the State Level
   - CCEDC Meeting Schedule
3. Council Vice Chair's Report
   - December ED Forum Update
4. Finance Committee
   - License Plate Reserve Account Update
5. Other

Attachments:
Draft minutes from August 8, 2014 meeting

If you are deaf or hard of hearing or are a person with a disability who requires an accommodation, contact the Cape Cod Commission at 508-362-3828 or TTY 508-362-5885. Notice of at least 24 hours prior to the meeting is helpful.

Cape Cod Economic Development Council
3225 Main Street, PO Box 226, Barnstable, MA 02630

Minutes, September 12, 2014

Present:
Ken Cirillo, John Harris, Barbara Milligan, Felicia Penn, Paul Rumul, Sheryl Walsh, Allen White, David Willard, Dan Wolf (arrived 7:45)

Absent:
M. Pat Flynn, Brian Mannal, Rick Presbrey; John Kilroy, Leave of Absence

Also Attending:
CCC Staff: Leslie Richardson, Taree McIntyre

Felicia Penn called the meeting to order at 7:35 AM in the Barnstable County Innovation Room. Upon a motion by Allen White, second by Paul Rumul, the minutes of the August 8, 2014 meeting were approved.

Council Chair's Report

CCEDC Meeting Schedule:

Ms. Penn stated that, after two polls, members have not agreed on a convenient time for CCEDC meetings. After an inconclusive discussion of morning vs afternoon, Paul Rumul suggested that the meetings return to the original time of the first Thursday of the month, 5:00 pm. Upon a motion by Felicia Penn, second by Sheryl Walsh, members approved returning to the original time and location, with David Willard and Barbara Milligan dissenting.

Senator Dan Wolf – Economic Development at the State Level:

Senator Wolf addressed the following issues as they pertain to Cape Cod:

- Workforce development is one of the biggest challenges and credible, collaborative partnerships need to be established for a better chance at winning grant awards.
- Lack of affordable housing and the inadequate supply of current affordable housing continues to plague Cape Cod and deter economic growth.
- Efforts are being made to better promote the aquaculture industry in the public sector to increase capital investment. The state needs to formulate a more effective regulatory and management process for increased growth and better sustainability.
- Challenges facing the Open Cape fiber optic broadband network with integration of the platform into businesses and municipalities need to be addressed.
- The gap between wages and the cost of living on Cape Cod will continue to be a drain on the Cape's economy until rectified.

- Structural problems plaguing the Cape's economy are wastewater, the 3rd bridge, and infrastructure. Resolving any or all of these issues would be a boon to the creation of jobs and the economy as a whole. The government does not have the funds and does not have the ability to raise tax dollars to cover these projects.
- Leveraging the C&I Workforce Investment Board would be a good topic for the CCEDC to explore.
- The functionality of the Senate processes needs to be re-evaluated.

Ms. Penn noted that the knowledge workforce on Cape Cod is growing with the addition of Bridgewater State University. Cape Cod Community College and the two technical schools are prospering. The community college is offering a technical course to three area high schools using the Open Cape network.

Ms. Penn expressed the need for marine science technology to grow from the upper Cape to the mid/lower Cape. Senator Wolf stated that Aquaculture Research Center (ARC) is making great strides in the sharing of technology in marine science and wastewater. David Willard noted that the Highland Center of the National Park Service was also a great resource for technology sharing. Senator Wolf suggested that ARC and the Highland Center would be a great collaboration.

December Economic Development Forum Update:

Ms. Penn announced that the forum committee had a recent meeting and is well into the planning process. The forum will be December 4, 2014 in the Barnstable County Harborview Room, 8:30 – 10:30 am. Save-the-Date notices will be emailed in September to town planners, town economic development committees, and the four town EDICs. An information-gathering survey related to the Cape's economic issues will be released to participants in early October. This survey will provide the committee with information on opportunities, challenges, and trends that will be addressed at the forum. A draft survey (attached) was displayed to review the topics and format. Senator Wolf requested that the Cape Delegation be invited to the forum as it is a good lead-in to preparation of the state budget for the region.

Finance Committee

License Plate Reserve Account Update:

Paul Rumul stated that the FY15 budget was submitted to the county and the funds were being transferred. The county did not approve *Grant Stabilization Fund* as the name for the reserve fund so the title of the reserve account is still to be determined.

Other

Nominating Committee: Mr. Rumul announced that there are four terms expiring December 31, 2014. He will be contacting, not only those four, but all members to discuss their seats on the Council.

3rd Quarter Barnstable County Commissioner Update: Ms. Penn stated that the 3rd quarter update would be cancelled and the 4th quarter update would be more substantial with the results from the forum included.

The meeting was adjourned at 8:49 am.

CCEDC Questionnaire

1. Please answer the following questions:

What town/community do you serve?	
What is your title/position?	
What is your name?	
How many years have you been involved in economic development efforts in this town/community?	

*2. Please rank the following economic development variables in importance for your town or community: (1 being the most important- Once a ranking is assigned to a variable, the variable will be repositioned to the numerical assignment of the ranking. For example, PARKING is the 9th choice in the question below, if ranked as the number 1 variable, this would be repositioned to line 1 in the ranking choices).

- Reliable Public Transportation
- Wastewater Solutions
- Broadband Infrastructure: Last Mile Build Out
- More Commercial Growth
- More Residential Growth
- Innovation Center/ Business Incubator
- A Broadened Tax Base
- More Rental Apartments
- Parking
- Workforce Housing
- Indoor Recreational Areas

Outdoor Recreational Areas

Convention/Hotel Facilities

3. Based on the above question, are there are any other economic development variables you wish to mention?

***4. Please rank the following education and workforce training variables in order of importance: (1 being the most important - Once a ranking is assigned to a variable, the variable will be repositioned to the numerical assignment of the ranking)**

Pre-K Through 12 Education

Higher Education: 2 Year Degrees

Higher Education: 4 Year Degrees And Post Graduate Courses

"Smarter" Educational Teaching Methods In Grades 8-12

Technical Or Certificate-Based Education

Sustainable Employment/Entrepreneurial Opportunities

Livable Wage Jobs

Knowledge Workforce Jobs/ Opportunities

5. Based on the question above, are there any other educational or workforce training variables you wish to mention?

***6. Please rank the following land use and government support variables in order of importance for your town and community: (1 being the most important - Once a ranking is assigned to a variable, the variable will be repositioned to the numerical assignment of the ranking)**

Technical Assistance In Planning And Development

- Creating An Arts & Culture District
- Revised Zoning Regulations
- Public Access To The Shore
- Protected Environment And Open Space
- Downtown Growth Incentives
- Change In Town Government Structure
- e-Permitting
- A Ban On Formula Stores

7. Based on the question above, are there any other land use and government support variables you wish to mention?

***8. Please indicate the success achieved by your group: (check all that apply)**

- Implemented New Development-Friendly Zoning
- Created An Industrial/Economic/Technology Development Area Or Park
- Created A Long Term Economic Growth Plan For Town
- Implemented Smart Growth Principles: Denser Development Offset By Open Space
- Encouraged Town To Implement e-Permitting
- Recruited Businesses To Relocate In Town
- Worked With Municipality & Schools To Use Open Care Resources
- Worked With Town And Developers To Create Accessory Apartments
- Created Public/Private Partnership For A Project
- Worked To Create Maker Spaces
- Created An Arts & Culture District
- Created A Growth Incentive Zone
- Received Grant Funds For Programs/ Projects
- Received Town Funds For Operational Expenses
- Negotiated Commercial Development Projects
- Worked To Create Tax Incentives For Commercial Developers

Worked With Local Or Regional Chamber Of Commerce To Market Town To Tourists

Other (please specify)

*9. Please indicate the biggest difficulties facing your group: (check all that apply)

Lack Of Funding

Lack Of Strategic Planning

Lack Of Power/Ability To Implement Plan

Lack Of Focus

Lack Of Public Support

Lack Of Town Support

Lack Of Technical Assistance

Lack Of Zoning To Support Plan

Other (please specify)

10. If you had all the resources you needed, both monetary and human, what would you implement in the next three years, to have the most positive economic impact on your town? Please tell us in five sentences or less.

Done

Cape Cod Economic Development Council

Monthly Meeting Agenda

Meeting Date: August 8, 2014
Time: 7:30 AM
Location: Innovation Room, Open Cape Building
3195 Main Street, Barnstable, MA 02630

1. Board Minutes
   - Approval of June 13, 2014 Draft Minutes

2. Council Chair's Report, *Felicia Penn*
   - Guest Speaker: Dan Vortherms, Open Cape, Current Status and Future Plans
   - Guest Speaker: Wendy Northcross, Cape Cod Chamber, Current Economic Development Agenda

3. Council Vice Chair's Report, *Ken Cirillo*
   - Status of EDC/EDIC Fall Meeting

4. Finance Committee, *Paul Rumul*
   - FY15 Budget Update

5. Public Outreach
   - Cape Cod Commission - Regional Policy Plan (RPP) Update Process, *Leslie Richardson*

6. Other
   - Committee for Safer Roads & Bridges Letter Response, *Felicia Penn*
   - SmarterCape Partnership – Expansion of Partners, *Felicia Penn*

<u>Attachments:</u>
Draft minutes of June 13, 2014 meeting

Cape Cod Economic Development Council
3225 Main Street, PO Box 226, Barnstable, MA 02630

Minutes, August 8, 2014

Present:
M. Pat Flynn, Barbara Milligan, Felicia Penn, Rick Presbrey, Paul Rumul, Sheryl Walsh, Allen White, David Willard,

Absent:
Ken Cirillo, Brian Mannal, Dan Wolf; John Kilroy, LoA

Also Attending:
CCC Staff: Leslie Richardson, Taree McIntyre; Dan Vortherms, CEO of OpenCape; Wendy Northcross, CEO of the Cape Cod Chamber

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Felicia Penn called the meeting to order at 7:34 AM in the Innovation Room of the Open Cape Building. Upon a motion by Paul Rumul, second by David Willard, the minutes of the June 13, 2014 meeting were approved.

Council Chair's Report:
Dan Vortherms updated the CCEDC on the current status and future plans of OpenCape. Mr. Vortherms spoke briefly about the technical aspects of the fiber optic and microwave network reviewing the 335 miles of cable with its current locations and hookups. The focus of the presentation was on the future of OpenCape which involves building the network and adding revenue. Mr. Vortherms expects to have discussions with the 15 towns on Cape Cod regarding available services, joint endeavors, and economic development. After his presentation, Mr. Vortherms led a tour of the OpenCape Regional Colocation Data Center. This center houses equipment, space, and bandwidth while providing power, cooling, and physical security for servers and networking equipment.

Wendy Northcross presented information on the Chamber's current economic development focus. Tony Shepley, President of Shepley Wood Products, is the new Chair of the Chamber's Economic & Community Development Pillar. Ms. Northcross presented documents outlining the Chamber's Strategic Plan and the Action Plan (attached) of the economic committee. A flowchart (attached) depicting how the Cape economy stems from water, the Cape's biggest asset, was also shared. Discussion touched on the Cape's traffic issues and Pat Flynn noted the county's increased effort in developing bike paths along with bike safety education for cyclists and drivers. Ms. Northcross urged everyone to view the Chamber's new website - capecodunpaved.com – for additional information on bike trails. Members discussed the ease of commuting to the Cape with the addition of Jet Blue and the Cape Flyer and noted that having these services year round vs seasonal would be beneficial.

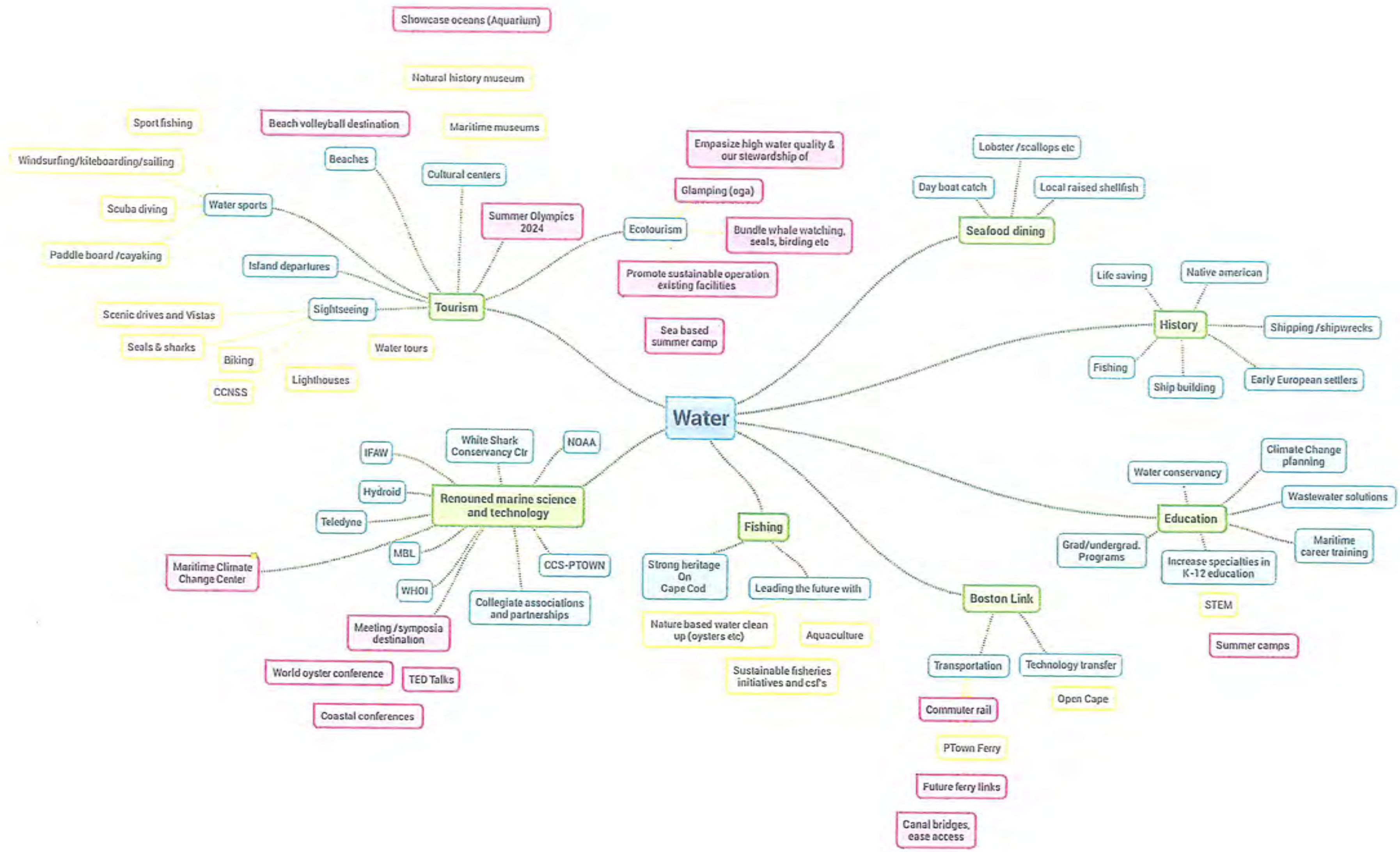
Council Vice Chair's Report *by Sheryl Walsh for Ken Cirillo:*
Sheryl Walsh shared a power point (attached) prepared by Ken Cirillo summarizing the role of the CCEDC in the Cape's economic growth and establishing the planning process for the Economic Development Forum, potentially scheduled for December 4, 2014. Ms. Penn stated that, due to the current work load, Cape Cod Commission staff would not be available to provide expertise on the CEDS, the 208 Plan, Chapter H, the Regional Policy Plan, and the Regional Transportation Plan at the forum. A discussion followed with suggestions for the length of the meeting, invitees and contact information, and subject matter for the forum. Ms. Penn suggested using a questionnaire or survey prior to the forum to help identify trends with accomplishments/opportunities/challenges to aid in the planning of the forum and engage the invitees. The Forum Committee will schedule a meeting to continue the planning process.

Finance Committee:
Paul Rumul presented a revised draft budget for FY15 (attached). Ms. Penn stated that the $500 proposed for website maintenance would not be needed and should be added to the reserve. Members discussed renaming the reserve fund and revised the name to Grant Stabilization Fund. Mr. Rumul motioned to approve the budget with the two revisions, David Willard seconded, and all approved.

Public Outreach:
Cape Cod Commission – Regional Policy Plan (RPP) Update Process
Leslie Richardson stated that the Cape Cod Commission was beginning the process to update the Regional Policy Plan. The process used to establish the 208 Water Quality Plan was well received by the Stakeholders and the same process will be used for the RPP. Several meetings will be held in each of the four Cape sub-regions through the end of the year and will focus on regional efforts including the 208 Water Quality Plan, CEDS and various RESET projects, Chapter H, the Regional Policy Plan, and the Regional Transportation Plan. All meetings are open to the public and the schedule will be available on our website and highly publicized.

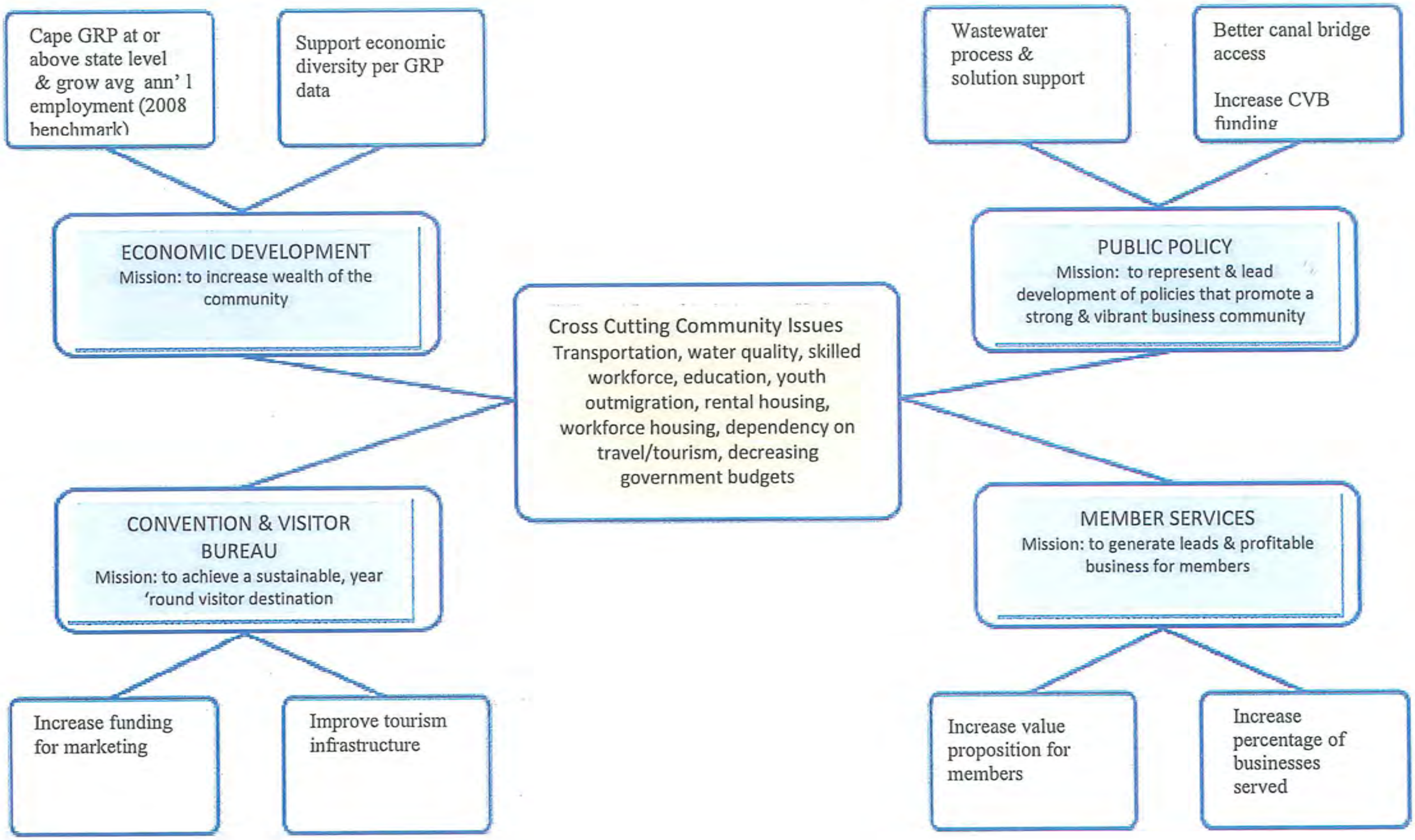
Other:
Members continued the ongoing conversation revolving around the best day and time to schedule the EDC meetings. Ms. Penn will send out a doodle poll with several options so that members can mark the most convenient times that fit their schedules.

The meeting was adjourned at 9:30 am.


Water
Tourism
Showcase oceans (Aquarium)
Natural history museum
Maritime museums
Beach volleyball destination
Sport fishing
Windsurfing/kiteboarding/sailing
Water sports
Scuba diving
Paddle board /cayaking
Beaches
Cultural centers
Summer Olympics 2024
Island departures
Sightseeing
Scenic drives and Vistas
Seals & sharks
Biking
CCNSS
Lighthouses
Water tours
Ecotourism
Empasize high water quality & our stewardship of
Glamping (oga)
Bundle whale watching, seals, birding etc
Promote sustainable operation existing facilities
Sea based summer camp
Seafood dining
Lobster /scallops etc
Day boat catch
Local raised shellfish
History
Life saving
Native american
Shipping /shipwrecks
Fishing
Ship building
Early European settlers
Education
Water conservancy
Climate Change planning
Wastewater solutions
Maritime career training
Grad/undergrad. Programs
Increase specialties in K-12 education
STEM
Summer camps
Boston Link
Transportation
Technology transfer
Open Cape
Commuter rail
PTown Ferry
Future ferry links
Canal bridges, ease access
Fishing
Strong heritage On Cape Cod
Leading the future with
Nature based water clean up (oysters etc)
Aquaculture
Sustainable fisheries initiatives and csf's
Renouned marine science and technology
IFAW
White Shark Conservancy Ctr
NOAA
Hydroid
Teledyne
MBL
Maritime Climate Change Center
WHOI
CCS-PTOWN
Collegiate associations and partnerships
Meeting /symposia destination
World oyster conference
TED Talks
Coastal conferences

3-5 Year Big Strategies ~ **Cape Cod Chamber Strategic Plan**

Adopted January 2, 2013



capecod
CHAMBER OF COMMERCE
CONVENTION & VISITORS BUREAU

3-5 YEAR GOALS:

- Cape Cod GRP to match or outperform state GDP
- Support economic diversification as measured by GRP sector data
- Grow average annual employment (benchmark at 2008 levels)

ECONOMIC & COMMUNITY DEVELOPMENT PILLAR FY 14 ACTION PLAN

1. Study and then deliver recommendations and action plans on new ways to support business startup or business growth in order to grow jobs.
    a. Programs for top 100 employers & 20-employee businesses
    b. Increase programs for entrepreneurs:
        i. Support CCYP study
        ii. Add a Startup Weekend event in November
        iii. CCCC Entrepreneur Curriculum
    c. Increase creative economy cluster & benchmark against Berkshires
        i. Organize **CreativeNEXT** business assistance events with state & local partners
        ii. With the AFCC apply for Creative Economy Network organization status
    d. Build out Launch pad space at Chamber
    e. MCC grant for Placemaking Project – linking artists, architects and communities in public art installations (benches, way finding signs, lighting, etc.)
    f. Educate local towns, local chambers & EDICs on Chapter H regulations (relief from 10,000 square foot thresholds for Commission review)
    g. Identify new economic centers for town/commission approval or certification
    h. Grow marketing effort:
        i. Identify a source for COL index or
        ii. Develop criteria for COL and seek data to create Cape Cod measurements
            1. Map tax rates & compare to competitive counties

2. Develop strategies to maintain funding streams via License Plates and REDO grant

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Operational Duties Performed by Staff:

REDO activity

Retain REDO status and act as the HUB for business assistance /Write application for REDO
Implement REDO scope of services as approved by MOBD

- Report REDO activities to MOBD (June 30, 2013)

Manage Entrepreneurs Resource System (ERS)

- ✓ Convene other resource providers monthly to advance the viability of high-potential entrepreneurs.
- ✓ Manage the Sales Force software to track entrepreneurs' progress
- ✓ Organize and execute SmarterCape
- ✓ Organize and execute Start-Up Weekend in March and November

Organize and execute NEXT (a follow up to Start-Up Weekend)

- ✓ Finalize and launch Live Work Play Create website
- ✓ Track businesses or entrepreneurs seeking assistance at all levels (non-ERS businesses)
- ✓ Implement marketing plan for SmarterCape Partnership (Live Work Play Create)

Chamber activity

- ✓ Support organizational overhead of Coastal Community Capital

Finalize iSEM findings and present to Pillar/Board for implementation consideration

- ✓ Organize and implement License Plate marketing plan with partners
- ✓ Market Arts App
- ✓ Write and submit MCC grant for Placemaking – oversee implementation with partners

The mission of the CCEDC is:

"To improve the quality of life for all residents of Barnstable County by fostering public policies and financing, through grants, activities that lead to a healthy year-round economy compatible with the Cape Cod environment and culture."

This mission is accomplished by:

Providing financial support via grants for innovative projects that strengthen the Cape's economic infrastructure by collaborating with the non-profit, public and private sectors on economic development initiatives.

CCEDC Grants:

Have supported wastewater treatment, zoning by-laws, village growth centers, main street redevelopment, education, STEM programs, renewable energy, the OpenCape project, arts and culture and Buy Fresh Buy Local.

CAPE COD live, work, play, create!

Why Cape Cod? Find The Answer Here

COASTAL COMMUNITY CAPITAL

CCEDC granted Coastal Community Capital $100,000 to develop their local revolving loan fund for small businesses.

STATS CapeCod

STATS Cape Cod is funded by the CCEDC

100% of our grant funds derive from proceeds from the Cape & Island License Plate program. Click License Plate image to Order Yours and Support Economic Development on Cape Cod.

OpenCape Received it's First "Seed" Money from CCEDC in 2008: $50,000

ARTS FOUNDATION OF CAPE COD

Each year Barnstable County supports the Arts Foundation of Cape Cod with a gift of $35,000. $10,000 of that is from Cape and Island License Plate funds.

CEDS

The EDC most recently focused on the implementation of the CEDS (Comprehensive Economic Development Strategy) and developing regional economic infrastructure—all conducive to enabling economic development on Cape Cod.

Economic Development

X Cape Towns & x Chambers EDC's/EDIC's

- http://www.capecodedc.org/resources-links/
- (master list from which we can select to invite)

Economic Development Stakeholders Forum

- **When:** Thursday, December 4th, 2014 (TBD), Time: 0830 – 1200 – refreshments and lunch.
- **Who's Invited:**
  - EDC's/EDIC's & anyone else doing Economic Development on Cape Cod
  - Recent CCEDC Grant recipients and those that submitted applications

Economic Development Stakeholders Forum

- **Topics To Be Discussed:**
  - Updates on:
    - OpenCape
    - Chapter 208 Planning Efforts
    - Regional Policy Plan
    - Regional Transportation Plan
    - CEDS

Economic Development Stakeholders Forum

- **Why do it, how does it all tie in and why do we want to bring everyone together?:**
  - To find out what the EDC's/EDIC's on Cape are doing
  - Learn "best practices" – sharing of information – is there one example of how the sharing of information between neighboring towns has resulted in a joint project?
  - Become updated on the regional strategic planning & regulatory changes taking place
  - To hear what they believe their opportunities are and also what the greatest challenges are in their communities re: economic development. (listening to them about this would be very educational to us, as it may point out areas where they require more information or more support)

Economic Development Stakeholders Forum

- Items for discussion:

1. Date
2. Venue
3. Duration; half day with lunch (2 four hour sessions)
4. Presentations; Who does what for the high-level overviews?
5. Do we need a facilitator?
6. Budget
7. Invite List – establish the reasons for the forum, solicit input on their pain points, short term goals, priorities, etc.
8. In advance of the meeting (2 – 3 weeks), we will get each groups presentation, review for commonality/conflicts, summarize the agenda and planned outcome.
9. Create working group and set a date/time to meet to finalize the plan and begin

Draft Budget FY 15
Cape Cod Economic Development Council

		FY 15
Revenue	$1,135,000 x 33.87%	$379,000.00
Balance from FY 14 (not including $60,000.00 to be set up in reserve)		$67,500.00
Total Revenue		**$446,500.00**
Expenses		
Financial support to Cape Cod Commission		$290,000.00
CI plate mktg $101,788.00 x 33.87% =		$33,000.00
Rest Area support		$19,500.00
Arts Foundation		$10,000.00
Smarter Cape support		$2,500.00
Web site maintenance		$500.00
Misc (including retreat @$1,500)		$3,500.00
Grant Program		$45,000.00
Move to Reserve		$36,500.00
Contingency		$6,000.00
Total Expenses		**$446,500.00**

Cape Cod Economic Development Council

Monthly Meeting Agenda

Meeting Date: July 11, 2014
Time: 7:30 AM
Location: Innovation Room, Open Cape Building
3195 Main Street, Barnstable, MA 02630

This meeting has been cancelled.

If you are deaf or hard of hearing or are a person with a disability who requires an accommodation, contact the Cape Cod Commission at 508-362-3828 or TTY 508-362-5885. Notice of at least 24 hours prior to the meeting is helpful.

CAPE COD COMMISSION

Appendix 3: CEDS 5-Year Planning process summary

Development of the CEDS five-Year Plan (2014)

The Cape Cod Commission and the Cape Cod Economic Development Council devoted an unprecedented amount of financial and staff resources to the development of the 2009 five-year plan and its implementation. This support continues with the 2014 five-year update.

As with the 2009 five-year update, this strategy is based on the Cape Cod Regional Policy Plan (RPP). Each issue area in the RPP has a set of goals; the economic development goals are the same in the CEDS as those included in the RPP. The visioning and public participation efforts around the development of these goals are conducted as part of the regular update of the Regional Policy Plan. Therefore, the CEDS planning process focused primarily on the development of regional and local priority projects given the regional economic context outlined in Chapter 3 of this document.

THE CEDS CALL FOR PROJECTS

The first step in the update process was to solicit project ideas from the 15 towns that make up Cape Cod. A letter was sent out to each Town Administrator requesting local projects they felt would facilitate economic development in their community. Eight towns responded with forty priority projects the details of which are included in Chapter 4.

THE CEDS SURVEY

The Cape Cod Commission designed and issued a CEDS Survey for the five-year update of the CEDS document. The survey instrument and the final results are included in the appendix. Included in the survey were specific questions about potential regional priority projects. The 397

CAPE COD COMMISSION

respondents ranked the projects according to how important they felt they were to the regional economy with the results as follows:

1. Seasonal Passenger Rail Service from Boston
2. Regional Infrastructure Financing Authority to fund construction of Wastewater Infrastructure
3. Commuter Rail Service to Boston
4. Entrepreneurship Training & Business Support
5. Conference Center
6. Regional Performing Arts Center
7. Third Bridge across the Canal
8. Redevelopment Authority to Aggregate Commercial Land for Redevelopment
9. Large Sporting Fields Facility

An open ended question was included in the survey also so that respondents could nominate other ideas for regional priority projects.

The survey also affirmed the principles underpinning the CEDS vision placing protecting the environment and creating employment and business opportunities as the most important aspects of that vision.

Some universal themes throughout the survey include the need for more rental apartments.

- 62% see a need for more rental housing
- 94% rated the high cost of housing as a moderate or significant problem

In terms of the Cape's built environment, 63% of survey respondents believe that there is too little or not the right kind of commercial development, 37% believe it's just right or too much.

- 17% Too Much
- 31% Too Little
- 20% Just Right
- 32% Not the right kind

As for the types of commercial development, survey respondents see the greatest need for more laboratory/research and development space (71%)

and light manufacturing (60%). Low on their priorities was warehouses (11%) and medical offices (18%).

Respondents were split on whether “big box” retail development had a place on Cape Cod. While 49% said they did not support such uses, those indicating support were qualified in their responses.

- 49% do not support “big box” retail
- 23% support it anywhere on Cape
- 10% support “big box” retail west of Bass River
- 19% support such uses only in Hyannis

THE CEDS WORKSHOP

The third step in the CEDS planning process was to hold a workshop inviting regional and local partners from chambers of commerce to town officials to regional non-profits related to economic development. The invitation when out to over 150 people; the list of attendees is included in Appendix ***.

The agenda of the workshop included a presentation on the recently conferred Economic Development District Designation, and two group exercises to complete a SWOT[1] analysis and nominate priority projects. The results of the SWOT analysis are included in Chapter 3 and the regional priority projects are outlined in Chapter 4.

The priority projects submitted by towns and those nominated at the workshop where then vetted by the strategy committee to identify those that would become regional priorities for the Cape Cod Commission and partner organizations to take the lead on over the next five years. The regional priority projects were also chosen based on the likelihood that they would be eligible for funding from the EDA through their grant programs.

[1] A SWOT analysis allows participants to identify the strengths and weaknesses of economic development on Cape Cod and the opportunities and threats to the regional economy from outside the region.

THE CEDS FOCUS GROUPS

Once a short list of regional priority projects was agreed to by the Strategy Committee the list was brought to a series of three focus groups. The purpose of the focus groups was to ensure that the projects made sense given the needs of the business community and the public. The three focus groups were:

1. Large and Small Businesses
2. Municipal Staff
3. Elected Officials

Participants were asked to rank the new options for this five year update according to importance and answer a set of questions regarding the projects expected impact on the economy. Each person had an opportunity to share their reactions. The session lasted an hour and a half.

The presentation used in the focus groups is included in the appendix to this report. The findings will be discussed in Chapter 4 with the presentation of the final regional priority projects.

THE SMARTER ECONOMY CONFERENCE

The Smarter Economy Conference was an opportunity to understand the workings of the Cape Cod economy and form policies to continue to improve its vibrancy. The conference built on previous SmarterCape summits that sought to leverage technology, particularly broadband, to move policies forward that would enhance Cape Cod communities, including their environment, economy, governance, and education.

This year's focus on the economy included keynote speakers and panels sharing research and experience that shed light on the economic opportunities and challenges that face Cape Cod. With this information, participants had a chance to weigh in on the essential question of how to manage our land use in a way that will bring us the greatest economic return without harming our key asset, the natural environment. The material gathered during this interactive session will inform the Cape Cod

Regional Policy Plan and has been used in writing the Cape Cod Comprehensive Economic Development Strategy. Participants and materials from the conference are included in the appendix.

THE CEDS APPROVAL PROCESS

The CEDS Strategy Committee (the Cape Cod EDC), endorsed and the Cape Cod Commission adopted the CEDS on behalf of Barnstable County, as follows:

- Public Comment Period (May 6th – May 23rd)

- Cape Cod Commission Planning Committee (June 2, 2014)
  Reviewed the CEDS chapters and priority projects; recommended approval by the full Commission.

- Cape Cod Economic Development Council (June 13, 2014)
  Endorsed CEDS and recommended adoption by the Cape Cod Commission on behalf of Barnstable County; incorporated CEDS implementation into work plan.

- Cape Cod Commission (June 19, 2014)
  Certified the CEDS as consistent with Regional Policy Plan and adopted it for implementation.

Appendix 4: Cape Cod Homeowners Survey

UMASS DONAHUE INSTITUTE • APPLIED RESEARCH & PROGRAM EVALUATION

Cape Cod Commission

Final Report

2014 Cape Cod Homeowner Survey

February 2015

Contents

Executive Summary

In the fall of 2014, the University of Massachusetts Donahue Institute conducted a survey of a random sample of 1,637 Cape Cod homeowners for the Cape Cod Commission. The purpose of the survey was to obtain homeowners' perspectives and opinions related to several planning and development issues on Cape Cod, and ultimately to inform revision of the Regional Policy Plan. Approximately 24% (or 389) of those sampled responded. Survey results are reported for the Cape as a whole, and for each of the Cape's four sub-regions: Upper Cape, Mid-Cape, Lower Cape, and Outer Cape.[1] Where statistically significant differences were found, results are also reported to show differences between year-round and seasonal homeowners, and male and female respondents, and among respondents of different age and income categories.

Homeowners and their Homes

Just over half of survey respondents were year-round residents. The majority have owned their homes for more than 15 years. The top factors drawing homeowners to Cape Cod were environmental quality, access to the coast, reasonable taxes, outdoor recreational opportunities, and the affordability of housing. Over time, these factors have consistently been among the most frequently cited reasons for the initial decision to live or maintain a home on the Cape. Approximately one-fourth of respondents indicated owning homes adjacent to water, but less than 20% carried flood insurance.

Current and Future Problems

Traffic congestion, coastal erosion, the availability of jobs and economic opportunities, and the pollution of ponds and coastal waters were consistently identified as current problems facing Cape Cod and its towns. Coastal erosion in particular appears to have become more of a concern over time. These issues also were among the most frequently identified as potential serious problems five years from now. Costs associated with wastewater treatment and solid waste disposal were of concern to many residents as well, particularly those who make Cape Cod their home year-round. Of the list of issues specified, respondents were generally least concerned about the availability of recreational opportunities in their towns and on the Cape as a whole.

Perspectives on Development

Generally, there is not substantial support for new residential or commercial development. Notable exceptions include a technology firm, light industrial use development, a cultural facility, and small neighborhood businesses. The majority of respondents would support making development easier in already-developed commercial areas, but more difficult in less developed areas; year-round residents and those with homes in the Upper and Mid Cape regions more frequently favored this approach. Infrastructure development support was greatest for bike paths and sewer treatment and collection systems. Results do not indicate a strong majority opinion on potential approaches to alleviating traffic congestion—including construction of a third automobile

[1] The following is a list of Cape Cod towns by sub-region:
Upper Cape – Bourne, Falmouth, Mashpee, and Sandwich
Mid-Cape – Barnstable, Dennis, and Yarmouth
Lower Cape – Brewster, Chatham, Harwich, and Orleans
Outer Cape – Eastham, Provincetown, Truro, and Wellfleet

bridge and widening Rt. 6 after exit 9—although fewer than half of respondents indicated support for expansion of Rt. 6 before exit 9 or for expansion of state-numbered roads.

Opinions on Town Projects

The majority of respondents indicated support for several potential town projects funded through a local tax increase. Support was greatest for land purchases for water supply protection, open space preservation, and recreational purposes. Fewer than half of respondents supported increasing taxes to facilitate the construction of public recreational facilities or property acquisition for affordable housing.

Cape Cod Commission

Homeowners indicated the highest priorities of the Cape Cod Commission should be those related to water quality and the improvement of wastewater management, open space preservation, the preservation and enhancement of agriculture and the fishing and shellfishing industries, and the promotion of road improvements. Most respondents indicated their support for many potential Cape Cod Commission regulations; however, support was least for requiring residential and commercial developers to support affordable housing, either by setting aside new residential units or by offsetting wages with support for this purpose. With the exception of land use planning—which about 42% of homeowners felt should be addressed only by towns—respondents generally felt that most planning issues should be addressed at both the town and regional levels.

Water Quality

Most Cape Cod residents appeared to enjoy the water view and opportunity for swimming that comes with living near the water. Although approximately half of respondents reported noticing a change in coastal or pond water quality in the past ten years, few reported changing or stopping their engagement in water related activities as a result.

Format of the Report

The report consists of the following sections: Introduction, Methodology, Results, and Conclusion. Results are presented according to broad substantive area, including a descriptive profile of respondents and their homes, current and future problems facing Cape Cod and its towns, perspectives on development, opinions on town projects, the role and priorities of the Cape Cod Commission, water quality, and comparisons of survey results over time. In addition to the primary report sections, there are three appendices: Appendix A contains a copy of the survey instrument; Appendix B provides survey response frequencies by question; and Appendix C includes a question-by-question comparison of the 2014 and 2005 surveys.

Introduction

The Cape Cod Commission Act requires the preparation of a Regional Policy Plan (RPP) that "establishes a coherent set of goals, policies, and standards to guide planning and development on Cape Cod in a way that will protect its resources."[2] The RPP, which is updated at least every five years, must identify critical resources and management needs; establish a growth policy for Barnstable County and guidelines for protection of resources and provision of capital facilities; set regional goals; and establish a policy, present regional goals, and present a policy for coordinating regional and local planning efforts. In order to produce a plan that meets the needs and goals of Cape Cod homeowners, the Cape Cod Commission (CCC) contracted with the University of Massachusetts Donahue Institute (UMDI) to conduct a survey of Cape Cod homeowners.

The 2014 Cape Cod Homeowner Survey was intended to gauge (1) how the Barnstable County populace felt about the built and natural environments on the Cape and the region's economic development, and (2) the extent to which these feelings have changed over time. To this end, the Homeowner Survey was based on a survey administered in 2005 for the CCC. Although some questions were revised based on CCC feedback, many questions were kept the same to allow for comparisons to be made across time periods. Specific areas of inquiry within the survey included the following: identification of current and potential future problems facing the Cape; perspectives on residential, commercial, and infrastructure development; opinions on specific kinds of town projects and on the priorities of the CCC; and perceptions of water quality on the Cape. The survey also provides information about homeowners and their properties.

In October and November 2014, UMDI surveyed 1,771 homeowners, who were randomly sampled from lists provided by Town Clerks of the 15 Barnstable County towns. Several surveys that were originally mailed to homeowners were returned as undeliverable by the Postal Service. Ultimately, 1,637 surveys were successfully mailed, and 389 homeowners (or 23.8% of those whose survey invitations were delivered) completed the survey.

This report is organized to provide a more detailed overview of the methods used to conduct the survey and analyze the data it generated, and to report results according to several broad, substantive areas: (1) a profile of homeowners and their homes; (2) identification of current and future problems facing the Cape and its towns; (3) perspectives on residential, commercial, and infrastructure development; (4) opinions on town projects; (5) the role and priorities of the Cape Cod Commission; (6) water quality; and (7) comparisons of survey results over time.

With the exception of the comparison over time, results are reported for the survey sample overall and are broken out by Cape Cod region (i.e., Upper Cape, Mid-Cape, Lower Cape, and Outer Cape). Results are also provided to allow for comparisons of responses from year-round and seasonal residents where such comparisons are statistically significant. Additionally, any areas in which responses differed significantly according to respondents' age, sex, or income level are noted throughout the report.

[2] Cape Cod Regional Policy Plan, effective January 16, 2009.

Methodology

Survey Instrument

The 2014 Cape Cod Homeowner Survey was developed in consultation with the Cape Cod Commission. The primary objective for the survey was to address particular informational needs of the CCC, while also reducing the length of the survey compared with its previous iteration and maximizing comparability with other homeowner surveys over time. Appendix A contains a copy of the paper-based survey that was mailed to a random sample of Cape Cod homeowners; an Internet-based version offered as an alternative response format was structured to match the questions, response options, and order of the paper survey. Item-by-item comparisons of the 2014 and 2005 surveys can be found in Appendix C.

Sample

In the fall of 2014, the town clerks of each Barnstable County town provided lists of all residential property owners and their mailing addresses. Excluding international mailing addresses for administrative purposes, UMDI randomly selected 1,771 property owners from the lists and mailed each an invitation to complete the survey, along with a paper survey and instructions for accessing the Internet-based alternative response format. Some of these mailed items were found to be sent more than once to the same homeowner, and some were returned by the Postal Service as undeliverable. UMDI researchers attempted to obtain accurate mailing addresses in these cases wherever possible. Ultimately, after accounting for any duplicate or undeliverable mailings, 1,637 Cape Cod homeowners were sampled. Of these, 389 homeowners completed the survey in October and November 2014, for a response rate of 23.8%.[3] A total of 34 respondents did not indicate the town in which their Cape Cod residence was located (question 20 on the survey). In all of these cases, the missing town data were able to be obtained from administrative files.

As indicated in Tables 1 and 2, approximately 65% of respondents were homeowners in Upper or Mid-Cape towns, with respondents from the town of Barnstable comprising a larger proportion of the sample than respondents from any other town.

[3] In cases where homeowners responded via both the paper survey and the Internet-based one, only the paper survey was counted. Therefore, the number 389 indicates that there were 389 unique respondents.

Table 1. Respondents by town

	n	Percent of total
Barnstable	60	15.4%
Bourne	28	7.2%
Brewster	21	5.4%
Chatham	20	5.1%
Dennis	39	10.0%
Eastham	19	4.9%
Falmouth	50	12.9%
Harwich	27	6.9%
Mashpee	20	5.1%
Orleans	20	5.1%
Provincetown	5	1.3%
Sandwich	24	6.2%
Truro	5	1.3%
Wellfleet	18	4.6%
Yarmouth	33	8.5%
Total	389	100%

Table 2. Respondents by region

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total
Total number of respondents	122	132	88	47	389
Percent of total	31.4%	33.9%	22.6%	12.1%	100%

Analysis and Interpretation

Overall response frequencies or averages for each question in the survey can be found in Appendix B. As there were 144,533 property owners listed in the files originally provided by town clerks, of whom 389 responded to the survey, the margin of error of the survey results (at the 95% confidence level) is +/- 4.96%.

Throughout the results sections of this report, frequencies are used to report results, though in some cases response categories are collapsed to assist with interpretation (e.g., for questions soliciting agreement with a particular initiative, the "strongly support" and "support" response categories are combined). In addition, survey results were analyzed comparatively among respondents from different Cape Cod regions and age and income categories, and results were also compared between male and female respondents and between those who reside on Cape Cod year-round and seasonally. All analyses in the body of the report show results by Cape Cod region, and additional tables are provided to show results by year-round residence in cases where there was a statistically significant difference ($p<.05$) in responses from year-round and seasonal residents. These results tables include a "Difference" column, in which "Sig." indicates a statistically significant difference among groups and "NS" indicates that the difference is not statistically significant. Comparisons by age, income, and sex, where such comparisons reflect statistically significant differences, are reported in the text.

Chi-square tests of independence with post-hoc analysis of standardized residuals were used to compare findings across the different comparative groups, in each case using a confidence level of 95%. In instances where chi-square test assumptions were violated, response categories were collapsed (e.g., the number of income categories was reduced from 10 to 7) to make interpretation of chi-square results appropriate. In addition, the Kruskal-Wallis H test was used to evaluate the statistical significance of group differences for survey questions that had ordinal response scales (e.g., those reflecting the extent of respondents' support or opposition along a continuum). A two-sample z-test for proportions was used to assess the statistical significance of changes in response frequencies between different survey time points.

Results

Survey results are organized in seven broad areas: (1) a profile of respondents and their homes; (2) current and future problems facing the Cape and its towns; (3) perspectives on residential, commercial, and infrastructure development; (4) opinions on town projects; (5) the priorities and role of the Cape Cod Commission; (6) water quality; and (7) comparisons of survey results over time.

Respondent Profile

Tables 3, 4, and 5 provide descriptive data on the survey respondents, overall and by the Cape Cod region where their property is located. Overall, about 56% of survey respondents were male and about 44% were female. Respondents' median age was 67.5, and no respondent was under the age of 30 or over the age of 95. Neither the proportion of male and female respondents nor the proportion of respondents in each age category differed significantly across the four Cape Cod regions. Slightly more than half of respondents overall reported an annual household income greater than $85,000, and although respondents from different regions appear to differ according to household income, these differences were not statistically significant. Statistically significant differences were found in respondents' income by age and by sex. In general, female respondents reported a lower household income than male respondents, and respondents between the ages of 50 and 59 reported higher incomes than respondents in other age ranges.

Table 3. Respondent sex (n=354)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total
Male	63.3%	53.3%	51.3%	55.6%	56.2%
Female	36.7%	46.7%	48.7%	44.4%	43.8%

Table 4. Respondent age (n=348)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total
30–39	1.9%	3.3%	0.0%	2.2%	2.0%
40–49	7.5%	5.0%	3.9%	2.2%	5.2%
50–59	17.9%	21.5%	22.4%	22.2%	20.7%
60–69	23.6%	32.2%	27.6%	35.6%	29.0%
70+	49.1%	38.0%	46.1%	37.8%	43.1%

Table 5. Respondent annual household income (n=315)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total
$35,000 or less	11.6%	11.0%	11.4%	2.4%	10.2%
$35,001 to $50,000	6.3%	12.8%	7.1%	0.0%	7.9%
$50,001 to $65,000	20.0%	7.3%	11.4%	14.6%	13.0%
$65,001 to $85,000	17.9%	14.7%	17.1%	12.2%	15.9%
$85,001 to $100,000	10.5%	11.0%	10.0%	17.1%	11.4%
$100,001 to $150,000	13.7%	21.1%	15.7%	24.4%	18.1%
More than $150,000	20.0%	22.0%	27.1%	29.3%	23.5%

Tables 6, 7, 8, and 9 provide data on the length of time respondents have owned their Cape Cod properties as well as the amount of time respondents spend living on the Cape each year. Approximately 70% of respondents are either lifetime Cape Cod residents or have lived on the Cape more than 15 years. Overall, 57.7% of respondents are year-round Cape residents. About 59% of respondents spent more than 6 months on the Cape during the 12 months prior to the 2014 survey, and just over 80% spent at least 3 months on the Cape during that period of time. Nearly 80% of respondents indicated the amount of time they spent on the Cape during the 12 months prior to the 2014 survey was about the same as the amount of time they are on the Cape in a typical year. There were no statistically significant differences between the four Cape Cod regions with regard to either the length of time respondents have owned a residence on Cape Cod, or the amount of time respondents reported residing on the Cape. Respondents in different age categories reported length of ownership that differed significantly. Although more than two-thirds of respondents aged 60 and older indicated they have owned their homes for more than 15 years, 41.5% of respondents aged 59 and below gave this response.

Table 6. Length of time owning a residence on Cape Cod (n=356)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total
Less than 1 year	0.0%	0.0%	0.0%	0.0%	0.0%
1 to 5 years	1.8%	3.2%	3.9%	13.0%	4.2%
6 to 10 years	15.6%	8.1%	9.1%	8.7%	10.7%
11 to 15 years	14.7%	15.3%	14.3%	13.0%	14.6%
More than 15 years	58.7%	60.5%	67.5%	54.3%	60.7%
Lifetime resident	9.2%	12.9%	5.2%	10.9%	9.8%

Year-round residence differed significantly by the region in which the home was located and by income group. Residents of the Outer Cape were more likely to report seasonal residence than respondents in other regions. Among respondents reporting an annual household income of more than $150,000, 31% were year-round residents, whereas more than two-thirds of respondents with an annual income of $85,000 or below were year-round residents.

Table 7. Are you a year-round resident of Cape Cod? (n=355)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total
Yes	65.7%	62.9%	53.2%	32.6%	57.7%
No	34.3%	37.1%	46.8%	67.4%	42.3%

Table 8. Amount of time on the Cape in past 12 months (n=343)					
	Upper Cape	**Mid-Cape**	**Lower Cape**	**Outer Cape**	**Total**
Less than 3 weeks	2.9%	5.0%	1.3%	4.5%	3.5%
3 weeks to 2 months	11.5%	13.4%	15.8%	36.4%	16.3%
3 to 6 months	17.3%	18.5%	28.9%	25.0%	21.3%
More than 6 months	68.3%	63.0%	53.9%	34.1%	58.9%

Table 9. Amount of time on the Cape in past 12 months compared with typical year (n=332)					
	Upper Cape	**Mid-Cape**	**Lower Cape**	**Outer Cape**	**Total**
More	6.1%	12.2%	14.7%	6.8%	10.2%
Less	8.2%	14.8%	5.3%	4.5%	9.3%
About the same	85.7%	73.0%	78.7%	86.4%	79.8%
This is my first year on the Cape	0.0%	0.0%	1.3%	2.3%	0.6%

The survey also asked respondents to indicate how important several factors were in their decision to live or maintain a residence on Cape Cod. The three factors most frequently rated as very important or important were environmental quality (92.7%), access to the coast (89.5%), and reasonable taxes (86.0%). The three factors least frequently rated as very important or important were job or economic opportunities (42.3%), a good place to raise children (43.4%), and shopping opportunities (44.8%).

As indicated in Table 10, there were statistically significant differences across the four Cape Cod regions in the importance of several factors. Upper Cape and Mid-Cape homeowners rated the following factors as very important or important more frequently than homeowners in the Lower and Outer Cape regions: job or economic opportunities, good place to raise children, good schools, outdoor recreational opportunities, and shopping opportunities. Upper Cape homeowners less frequently identified the importance of the historic character of the Cape. Outer Cape homeowners less frequently identified the importance of a good place to retire and more frequently indicated access to the coast as important. Respondents over the age of 70 were more likely than respondents of other ages to identify the importance of a good place to retire (86.1% compared with between 64% and 66%), and were less likely to identify job or economic opportunities (29.7% compared with over 50%) or a good place to raise children (36.9% compared with over 44%) as draws to the Cape. Compared with respondents with household incomes of no more than $100,000, respondents with household incomes greater than $150,000 annually were less likely to rate the importance of job or economic opportunities (20.8% compared with 50% or more) or housing that they can afford (63.9% compared with more than 82.0%). Access to the coast was less important to respondents with household incomes less than $35,000 per year (58.4%) than for all other income categories (each 90% or greater). In addition, nearness of friends or relatives was more important to female respondents (64%) than to male (54%).

Table 10. Percentage of respondents rating each factor as very important or important when they first decided to live or maintain a residence on the Cape (n=380*)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total	Difference
Job or economic opportunities	46.0%	51.2%	30.2%	31.1%	42.3%	Sig.
Good place to raise children	50.9%	47.6%	33.7%	31.2%	43.4%	Sig.
Good schools	50.9%	52.4%	40.8%	31.1%	46.7%	Sig.
Nearness of friends or relatives	62.8%	57.5%	59.0%	54.4%	59.1%	NS
Nearness to Boston or Providence	51.3%	46.5%	36.5%	43.5%	45.3%	NS
Housing that you can afford	78.8%	84.0%	68.2%	76.1%	77.8%	NS
Reasonable taxes	83.2%	90.5%	88.6%	76.1%	86.0%	NS
Public services	69.5%	80.1%	66.3%	61.7%	71.3%	NS
Environmental quality (clean air and water)	91.5%	93.7%	93.1%	91.3%	92.7%	NS
Access to the coast	87.4%	89.1%	89.5%	95.7%	89.5%	Sig.
Outdoor recreational opportunities, such as fishing, hiking, boating, etc.	80.9%	73.4%	85.2%	89.4%	80.4%	Sig.
Shopping opportunities	47.0%	52.8%	37.2%	31.1%	44.8%	Sig.
Good place to retire	71.2%	76.2%	81.2%	55.6%	73.3%	Sig.
Historic character of the Cape	60.5%	74.2%	75.9%	80.4%	71.0%	Sig.

*The number of homeowners providing a response for each factor ranged from 364 to 380.

Table 11 shows several factors for which year-round and seasonal residents differed in how important they perceived each factor to be in their decision to live or maintain a residence on the Cape. Compared with seasonal residents, year-round residents more frequently indicated the importance of job or economic opportunities, a good place to raise children, good schools, and housing that they can afford. Seasonal residents more frequently indicated the importance of access to the coast and the historic character of the Cape.

Table 11. Percentage of respondents (by year-round vs. seasonal residence) rating each factor as Very Important or Important when they first decided to live or maintain a residence on the Cape (n=380*)				
	Year-Round Residents	**Seasonal Residents**	**Total**	**Difference**
Job or economic opportunities	59.8%	17.6%	42.3%	Sig.
Good place to raise children	51.8%	31.0%	43.4%	Sig.
Good schools	58.4%	27.3%	46.7%	Sig.
Nearness of friends or relatives	61.7%	54.2%	59.1%	NS
Nearness to Boston or Providence	45.2%	46.9%	45.3%	NS
Housing that you can afford	82.7%	71.8%	77.8%	Sig.
Reasonable taxes	88.0%	83.4%	86.0%	NS
Public services	74.0%	68.3%	71.3%	NS
Environmental quality (clean air and water)	92.5%	93.8%	92.7%	NS
Access to the coast	85.0%	95.2%	89.5%	Sig.
Outdoor recreational opportunities, such as fishing, hiking, boating, etc.	72.6%	91.0%	80.4%	NS
Shopping opportunities	41.1%	49.3%	44.8%	NS
Good place to retire	71.5%	74.5%	73.3%	NS
Historic character of the Cape	61.5%	83.6%	71.0%	Sig.

*The number of homeowners providing a response for each factor ranged from 364 to 380.

Tables 12 and 13 provide data on respondents' plans for the use of their residences within the next 1 to 5 years and within the next 15 years. Just over half of respondents plan to use their home as a primary residence within the next 1 to 5 years, and 29.1% intend for their property to be a second home for personal or family use during this time. Within the next 15 years, 39.1% of respondents plan for their home to be their primary residence, and 27.5% intend to either sell their home or to hand it down to a family member or friend. Respondents' plans for their Cape Cod homes did not differ significantly by the Cape region in which the home is located. There was a statistically significant difference in the proportion of respondents of different age categories reporting plans to sell or hand down their home within the next 15 years. Of respondents aged 70 and older, 44.7% indicated they would sell or hand down their home, compared with 19.8% of those aged 60 to 69, and 14.9% of those aged 59 and below.

Table 12. Plans for use of home within next 1–5 years (n=333)					
	Upper Cape	**Mid-Cape**	**Lower Cape**	**Outer Cape**	**Total**
Only as a primary residence	62.9%	56.9%	46.1%	27.3%	52.3%
Only as a second home for personal/family use	23.7%	24.1%	38.2%	38.6%	29.1%
Only as a rental	2.1%	1.7%	0.0%	0.0%	1.2%
As both a rental and a primary residence	0.0%	0.9%	2.6%	4.5%	1.5%
As both a rental and a second home for personal/family use	4.1%	7.8%	6.6%	22.7%	8.4%
Sell it	2.1%	2.6%	5.3%	0.0%	2.7%
Hand it down to a family member or friend	3.1%	1.7%	0.0%	2.3%	1.8%
Don't know	2.1%	4.3%	1.3%	4.5%	3.0%

Table 13. Plans for use of home within next 15 years (n=338)					
	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total
Only as a primary residence	37.0%	45.0%	38.7%	27.9%	39.1%
Only as a second home for personal/family use	16.0%	8.3%	18.7%	14.0%	13.6%
Only as a rental	1.0%	0.8%	0.0%	0.0%	0.6%
As both a rental and a primary residence	1.0%	0.8%	0.0%	7.0%	1.5%
As both a rental and a second home for personal/family use	2.0%	4.2%	1.3%	4.7%	3.0%
Sell it	14.0%	10.0%	16.0%	14.0%	13.0%
Hand it down to a family member or friend	13.0%	15.8%	17.3%	9.3%	14.5%
Don't know	16.0%	15.0%	8.0%	23.3%	14.8%

Tables 14, 15, and 16 provide data on the location of homeowners' properties relative to water and on the prevalence of carrying flood insurance among respondents. About one-fourth of respondents' properties are adjacent to water, and about 17% report having property located in a flood zone. About 17% of respondents report carrying flood insurance. There were no statistically significant differences related to property location or flood insurance among respondents of different Cape Cod regions, age or income categories, or sexes, or between year-round and seasonal residents.

Table 14. Is property adjacent to water? (n=349)					
	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total
Yes	34.0%	19.0%	26.0%	22.2%	25.5%
No	66.0%	81.0%	74.0%	77.8%	74.5%

Table 15. Is property in a flood zone? (n=348)					
	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total
Yes	25.5%	17.4%	10.5%	8.9%	17.2%
No	63.2%	69.4%	75.0%	77.8%	69.8%
Don't know	11.3%	13.2%	14.5%	13.3%	12.9%

Table 16. Percentage of respondents with flood insurance (n=363)					
	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total
Yes	20.7%	21.6%	11.1%	8.7%	17.4%
No	72.1%	75.2%	81.5%	87.0%	77.1%
Don't know	7.2%	3.2%	7.4%	4.3%	5.5%

Current and Future Problems

The survey asked Cape Cod homeowners to consider a list of issues and rate the extent to which these issues are currently a problem, and to indicate whether they expect each issue to be a serious problem within the next five years. Homeowners were asked to consider each issue separately with regard to their own town and to the Cape as a whole. Tables 17 through 20 provide respondents' perceptions of current problems in their town and on the Cape, whereas Tables 21 through 24 indicate perceptions of serious problems in the next five years.

Overall, three issues stand out most as perceived current problems in respondents' towns: coastal erosion (85.5%), traffic congestion (85.4%), and availability of job or economic opportunities (82.2%). The three issues least frequently rated as current problems were availability of recreational opportunities (25.5%), adequacy of town services (35.5%), and quality of education (42.1%).

Table 17. Percentage of respondents rating each issue as current serious or moderate problem in their town (n=363*)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total	Difference
Residential sprawl	45.3%	44.5%	46.7%	46.7%	45.5%	NS
Commercial sprawl	36.9%	61.8%	39.7%	33.3%	45.5%	Sig.
Traffic congestion	83.5%	89.6%	80.5%	87.0%	85.4%	Sig.
Adequacy of town services	40.0%	34.2%	29.6%	38.1%	35.5%	NS
Loss of open space	54.7%	67.7%	63.2%	58.1%	61.6%	NS
Quality of education	45.2%	53.6%	28.6%	24.3%	42.1%	Sig.
Availability of moderate and lower-priced housing	58.2%	65.3%	67.5%	74.4%	64.7%	NS
Pollution of drinking water supply	56.8%	59.2%	60.5%	70.5%	60.1%	NS
Pollution of ponds or coastal waters	72.1%	77.7%	80.3%	83.3%	77.2%	NS
Coastal erosion	78.6%	90.4%	85.7%	88.4%	85.5%	NS
Air pollution	44.3%	52.5%	46.1%	46.5%	47.8%	NS
Taxes	77.9%	69.0%	61.8%	53.3%	68.3%	Sig.
Availability of job or economic opportunities	79.8%	88.2%	77.3%	80.0%	82.2%	NS
Loss of historic character	45.8%	62.5%	57.7%	55.6%	55.4%	NS
Cost of wastewater treatment	66.4%	73.9%	76.3%	61.5%	70.6%	NS
Cost of solid waste disposal	66.7%	74.8%	78.4%	72.5%	72.7%	NS
Availability of public transportation	66.1%	67.5%	66.7%	71.8%	67.4%	NS
Availability of recreational opportunities	25.4%	26.4%	29.5%	14.6%	25.5%	NS
Adequacy of healthcare facilities	39.6%	41.1%	43.8%	82.9%	46.1%	Sig.
Availability of high-speed Internet access	50.9%	44.3%	47.4%	43.9%	47.0%	NS

*The number of homeowners providing a response for each issue ranged from 323 to 363.

For some issues, statistically significant differences are evident across the Cape Cod regions, as well as between year-round and seasonal residents. Mid-Cape residents more frequently rated commercial sprawl as problematic, compared with residents of other regions. Upper Cape and Mid-Cape residents more frequently rated quality of education as a problem. Upper Cape residents more frequently rated taxes as a problem, and Outer Cape residents more frequently rated adequacy of healthcare facilities as a problem.[4] In addition, year-round residents were significantly more likely than seasonal residents to consider the following issues to be current problems in their town: adequacy of town services, availability of moderate and lower-priced housing, air pollution, availability of job or economic opportunities, cost of wastewater treatment, cost of solid waste disposal, availability of public transportation, and availability of recreational opportunities. Seasonal residents considered adequacy of healthcare facilities to be a problem more frequently than year-round residents.

The proportions of residents indicating some issues as a problem differed significantly by age or income group. About 65% of respondents aged 59 and under indicated pollution of ponds or coastal waters as a problem, compared with more than 80% of older respondents. About 58% of respondents aged 59 and under indicated cost of wastewater treatment or cost of solid waste disposal as problems, compared with more than 74% of older respondents. More than 79% of respondents with household income of $50,000 and below identified affordable housing as a problem, compared with 50% of respondents reporting an income of more than $150,000.

Table 18. Percentage of respondents (by year-round vs. seasonal residence) rating each issue as current serious or moderate problem in their town (n=363*)

	Year-Round Residents	Seasonal Residents	Total	Difference
Residential sprawl	47.3%	44.3%	45.5%	NS
Commercial sprawl	47.5%	43.4%	45.5%	NS
Traffic congestion	83.9%	86.0%	85.4%	NS
Adequacy of town services	40.0%	26.6%	35.5%	Sig.
Loss of open space	58.9%	67.5%	61.6%	NS
Quality of education	45.5%	35.1%	42.1%	NS
Availability of moderate and lower-priced housing	71.4%	51.6%	64.7%	Sig.
Pollution of drinking water supply	64.1%	54.3%	60.1%	NS
Pollution of ponds or coastal waters	81.9%	70.1%	77.2%	NS
Coastal erosion	83.6%	86.2%	85.5%	NS
Air pollution	53.2%	37.6%	47.8%	Sig.
Taxes	73.3%	60.6%	68.3%	Sig.
Availability of job or economic opportunities	90.1%	69.5%	82.2%	Sig.
Loss of historic character	54.2%	57.4%	55.4%	NS
Cost of waste-water treatment	78.0%	60.0%	70.6%	Sig.
Cost of solid waste disposal	75.9%	66.7%	72.7%	Sig.
Availability of public transportation	73.8%	57.2%	67.4%	Sig.
Availability of recreational opportunities	29.3%	18.1%	25.5%	Sig.
Adequacy of healthcare facilities	41.3%	53.1%	46.1%	Sig.
Availability of high-speed Internet access	50.0%	40.9%	47.0%	NS

*The number of homeowners providing a response for each issue ranged from 323 to 363.

Respondents' consideration of issues for the entire Cape yielded a similar pattern of results. The top three perceived problems were traffic congestion (93.2%), coastal erosion (91.9%), and availability of job or economic opportunities (88.6%). The three issues least frequently identified as problems were availability of recreational

[4] Differences between Cape Cod regions were also statistically significant for traffic congestion, but this issue was among the top concerns across all four regions. More than 80% of residents in each region indicated it as a serious or moderate problem.

opportunities (28.0%), availability of high-speed Internet access (49.9%), and adequacy of healthcare facilities (54.0%).

Compared with residents of other Cape Cod regions, Outer Cape residents more frequently rated residential sprawl, commercial sprawl, and adequacy of healthcare facilities as problems for the entire Cape. Lower Cape residents rated cost of solid waste disposal as a problem more frequently than other residents. Upper Cape residents less frequently considered loss of open space and loss of historic character to be problems, although for both issues, more than half of the region's residents considered the issue a problem.[5] A greater proportion of year-round than seasonal residents identified the following issues as problems: adequacy of town services, availability of moderate and lower-priced housing, pollution of drinking water supply, taxes, availability of job or economic opportunities, cost of wastewater treatment, cost of solid waste disposal, and availability of high-speed internet access. Compared with year-round residents, a greater percentage of seasonal residents indicated loss of historical character as a problem.

Table 19. Percentage of respondents rating each issue as current serious or moderate problem for the entire Cape (n=334*)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total	Difference
Residential sprawl	63.6%	61.2%	66.2%	83.0%	65.8%	Sig.
Commercial sprawl	63.0%	73.0%	74.3%	78.9%	70.8%	Sig.
Traffic congestion	94.3%	94.3%	89.2%	95.0%	93.2%	Sig.
Adequacy of town services	54.6%	57.6%	51.7%	48.5%	54.5%	NS
Loss of open space	67.0%	78.0%	82.1%	86.9%	76.5%	Sig.
Quality of education	52.1%	59.0%	53.2%	61.2%	55.9%	NS
Availability of moderate and lower-priced housing	68.6%	70.2%	76.0%	84.6%	72.8%	NS
Pollution of drinking water supply	71.8%	72.1%	80.9%	84.6%	75.4%	NS
Pollution of ponds or coastal waters	80.0%	80.3%	88.4%	89.2%	83.1%	Sig.
Coastal erosion	88.2%	96.7%	91.9%	86.8%	91.9%	NS
Air pollution	49.5%	56.8%	53.6%	65.8%	54.9%	NS
Taxes	77.0%	77.0%	75.0%	71.0%	75.9%	NS
Availability of job or economic opportunities	85.9%	94.8%	82.6%	87.8%	88.6%	NS
Loss of historic character	58.6%	70.4%	72.6%	82.1%	68.7%	Sig.
Cost of waste-water treatment	74.2%	78.5%	82.3%	78.8%	78.1%	NS
Cost of solid waste disposal	73.5%	78.7%	86.7%	76.5%	78.6%	Sig.
Availability of public transportation	68.7%	73.0%	75.4%	88.6%	73.9%	NS
Availability of recreational opportunities	22.8%	27.6%	36.1%	27.3%	28.0%	NS
Adequacy of healthcare facilities	43.3%	53.7%	55.6%	82.4%	54.0%	Sig.
Availability of high-speed Internet access	53.7%	47.3%	52.3%	42.5%	49.9%	NS

*The number of homeowners providing a response for each issue ranged from 290 to 334.

[5] Differences between Cape Cod regions were also statistically significant for traffic congestion and pollution of ponds or coastal waters, but this issue was among the top concerns across all four regions. At least 89% of respondents in each region considered traffic congestion to be a problem, and at least 80% of respondents in each region considered pollution of ponds or coastal waters to be a problem.

There were statistically significant differences among age and income groups in rating some issues as problems for the entire Cape. About 58% of respondents aged 59 and under indicated cost of wastewater treatment and cost of solid waste disposal as problems, compared with more than 79% of older respondents. More than 79% of respondents with household income of $50,000 and below identified affordable housing as a problem, compared with 62.3% of respondents reporting an income of more than $150,000.

Table 20. Percentage of respondents (by year-round vs. seasonal residence) rating each issue as current serious or moderate problem for the entire Cape (n=334*)

	Year-Round Residents	Seasonal Residents	Total	Difference
Residential sprawl	67.1%	65.9%	65.8%	NS
Commercial sprawl	72.3%	68.9%	70.8%	NS
Traffic congestion	92.0%	94.5%	93.2%	NS
Adequacy of town services	59.7%	45.3%	54.5%	Sig.
Loss of open space	74.7%	79.4%	76.5%	NS
Quality of education	58.5%	51.9%	55.9%	NS
Availability of moderate and lower-priced housing	76.8%	63.3%	72.8%	Sig.
Pollution of drinking water supply	81.6%	67.8%	75.4%	Sig.
Pollution of ponds or coastal waters	86.5%	76.7%	83.1%	NS
Coastal erosion	90.8%	93.4%	91.9%	NS
Air pollution	59.1%	47.9%	54.9%	NS
Taxes	81.1%	66.4%	75.9%	Sig.
Availability of job or economic opportunities	93.0%	81.9%	88.6%	Sig.
Loss of historic character	63.4%	74.8%	68.7%	Sig.
Cost of waste-water treatment	84.7%	68.7%	78.1%	Sig.
Cost of solid waste disposal	82.7%	70.9%	78.6%	Sig.
Availability of public transportation	79.7%	66.7%	73.9%	NS
Availability of recreational opportunities	31.4%	21.8%	28.0%	NS
Adequacy of healthcare facilities	51.6%	57.8%	54.0%	NS
Availability of high-speed Internet access	56.1%	39.4%	49.9%	Sig.

*The number of homeowners providing a response for each issue ranged from 290 to 334.

Among all respondents, the top three issues rated as serious problems in the next five years in their own towns and for the entire Cape were traffic congestion (84.7% in town, 92.9% for Cape), coastal erosion (78.2% in town, 86.1% for Cape), and the cost of wastewater treatment (76.6% in town, 81.7% for Cape).[6] The three issues least frequently rated as serious problems in the next five years were availability of recreational opportunities (20.2% in town, 21.7% for Cape), availability of high-speed Internet access (34.0% in town, 35.5% for Cape), and air pollution (38.8% in town, 42.8% for Cape). Compared with respondents aged 60 and over, a statistically significant smaller proportion of respondents aged 59 and under indicated that pollution of ponds or coastal waters, cost of wastewater treatment, or cost of solid waste disposal would be serious problems in either the respondents' town or for the entire Cape in the next five years.

Table 21. Percentage of respondents indicating each issue will be a serious problem in their town in the next five years (n=357*)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total	Difference
Residential sprawl	44.5%	50.0%	50.0%	47.7%	48.0%	NS
Commercial sprawl	41.7%	60.9%	46.8%	32.6%	48.1%	Sig.
Traffic congestion	84.5%	89.2%	78.5%	84.1%	84.7%	NS
Adequacy of town services	40.2%	47.0%	32.9%	38.1%	40.6%	NS
Loss of open space	54.2%	59.7%	53.1%	60.0%	56.5%	NS
Quality of education	42.5%	46.8%	23.3%	37.8%	39.1%	Sig.
Availability of moderate and lower-priced housing	57.9%	64.3%	61.3%	73.8%	62.8%	NS
Pollution of drinking water supply	57.8%	61.9%	57.1%	70.7%	60.6%	NS
Pollution of ponds or coastal waters	66.7%	71.4%	75.9%	82.9%	72.3%	NS
Coastal erosion	73.9%	77.2%	81.0%	86.4%	78.2%	NS
Air pollution	38.5%	42.6%	35.9%	34.1%	38.8%	NS
Taxes	73.0%	75.6%	58.2%	64.3%	69.5%	NS
Availability of job or economic opportunities	72.4%	75.2%	77.6%	74.4%	74.8%	NS
Loss of historic character	36.1%	51.3%	42.5%	54.5%	45.0%	NS
Cost of waste-water treatment	72.9%	77.6%	77.3%	82.5%	76.6%	NS
Cost of solid waste disposal	72.9%	78.6%	76.3%	78.6%	76.3%	NS
Availability of public transportation	51.8%	56.3%	52.7%	50.0%	53.3%	NS
Availability of recreational opportunities	20.2%	20.7%	20.3%	19.0%	20.2%	NS
Adequacy of healthcare facilities	31.2%	39.0%	40.8%	78.0%	41.6%	Sig.
Availability of high-speed Internet access	28.7%	34.8%	40.0%	34.9%	34.0%	NS

*The number of homeowners providing a response for each issue ranged from 327 to 357.

[6] The cost of solid waste disposal was rated as seriously problematic at a rate nearly identical to the cost of wastewater treatment.

Table 22. Percentage of respondents (by year-round vs. seasonal residence) indicating each issue will be a serious problem in their town in the next five years (n=357*)				
	Year-Round Residents	**Seasonal Residents**	**Total**	**Difference**
Residential sprawl	47.9%	48.8%	48.0%	NS
Commercial sprawl	48.4%	44.9%	48.1%	NS
Traffic congestion	83.9%	83.3%	84.7%	NS
Adequacy of town services	43.7%	35.2%	40.6%	NS
Loss of open space	55.2%	58.5%	56.5%	NS
Quality of education	45.0%	29.2%	39.1%	NS
Availability of moderate and lower-priced housing	69.8%	50.8%	62.8%	Sig.
Pollution of drinking water supply	62.9%	58.9%	60.6%	NS
Pollution of ponds or coastal waters	73.2%	69.0%	72.3%	NS
Coastal erosion	74.9%	78.9%	78.2%	NS
Air pollution	42.0%	35.0%	38.8%	NS
Taxes	74.1%	63.8%	69.5%	NS
Availability of job or economic opportunities	82.3%	62.7%	74.8%	Sig.
Loss of historic character	39.7%	52.3%	45.0%	NS
Cost of waste-water treatment	81.8%	69.7%	76.6%	NS
Cost of solid waste disposal	79.4%	71.3%	76.3%	NS
Availability of public transportation	56.0%	45.8%	53.3%	NS
Availability of recreational opportunities	19.8%	17.9%	20.2%	NS
Adequacy of healthcare facilities	36.8%	50.0%	41.6%	NS
Availability of high-speed Internet access	35.1%	29.6%	34.0%	NS

*The number of homeowners providing a response for each issue ranged from 327 to 357.

Table 23. Percentage of respondents indicating each issue will be a serious problem for the entire Cape in the next five years (n=336*)						
	Upper Cape	**Mid-Cape**	**Lower Cape**	**Outer Cape**	**Total**	**Difference**
Residential sprawl	56.1%	60.4%	62.5%	82.5%	62.3%	Sig.
Commercial sprawl	60.2%	67.0%	70.4%	76.9%	66.9%	NS
Traffic congestion	92.2%	94.2%	90.7%	94.9%	92.9%	NS
Adequacy of town services	51.1%	51.8%	41.5%	54.5%	49.7%	NS
Loss of open space	60.4%	67.5%	74.3%	86.8%	69.3%	Sig.
Quality of education	50.0%	52.7%	40.3%	55.9%	49.5%	NS
Availability of moderate and lower-priced housing	64.6%	71.2%	67.1%	76.3%	68.8%	NS
Pollution of drinking water supply	62.5%	70.2%	68.1%	78.4%	68.3%	NS
Pollution of ponds or coastal waters	69.5%	76.3%	81.1%	89.2%	76.9%	NS
Coastal erosion	81.0%	88.3%	89.2%	86.5%	86.1%	NS
Air pollution	38.1%	46.5%	43.1%	43.2%	42.8%	NS
Taxes	77.8%	79.1%	66.2%	71.1%	74.9%	NS

Table 23. Percentage of respondents indicating each issue will be a serious problem for the entire Cape in the next five years (n=336*)						
	Upper Cape	**Mid-Cape**	**Lower Cape**	**Outer Cape**	**Total**	**Difference**
Availability of job or economic opportunities	78.4%	81.3%	81.9%	81.6%	80.6%	NS
Loss of historic character	41.2%	58.8%	59.7%	73.0%	55.3%	Sig.
Cost of waste-water treatment	78.6%	82.3%	81.4%	88.9%	81.7%	NS
Cost of solid waste disposal	77.8%	81.7%	76.7%	81.6%	79.4%	NS
Availability of public transportation	60.0%	60.0%	53.5%	68.6%	59.5%	NS
Availability of recreational opportunities	20.2%	23.0%	19.7%	25.7%	21.7%	NS
Adequacy of healthcare facilities	35.7%	48.2%	48.6%	72.2%	47.2%	Sig.
Availability of high-speed Internet access	30.9%	37.6%	41.4%	29.7%	35.5%	NS

*The number of homeowners providing a response for each issue ranged from 298 to 336.

Table 24. Percentage of respondents (by year-round vs. seasonal residence) indicating each issue will be a serious problem for the entire Cape in the next five years (n=336*)				
	Year-Round Residents	**Seasonal Residents**	**Total**	**Difference**
Residential sprawl	62.5%	63.6%	62.3%	NS
Commercial sprawl	67.2%	63.9%	66.9%	NS
Traffic congestion	92.9%	92.1%	92.9%	NS
Adequacy of town services	50.9%	47.3%	49.7%	NS
Loss of open space	68.0%	70.9%	69.3%	NS
Quality of education	57.2%	37.5%	49.5%	NS
Availability of moderate and lower-priced housing	73.2%	61.0%	68.8%	NS
Pollution of drinking water supply	71.8%	63.2%	68.3%	NS
Pollution of ponds or coastal waters	78.0%	72.9%	76.9%	NS
Coastal erosion	84.2%	87.7%	86.1%	NS
Air pollution	45.1%	40.4%	42.8%	NS
Taxes	81.0%	66.1%	74.9%	Sig.
Availability of job or economic opportunities	88.2%	68.6%	80.6%	Sig.
Loss of historic character	47.2%	65.8%	55.3%	NS
Cost of waste-water treatment	87.4%	73.0%	81.7%	Sig.
Cost of solid waste disposal	83.8%	71.6%	79.4%	Sig.
Availability of public transportation	60.1%	56.0%	59.5%	NS
Availability of recreational opportunities	20.4%	20.5%	21.7%	NS
Adequacy of healthcare facilities	42.0%	56.5%	47.2%	NS
Availability of high-speed Internet access	37.1%	31.6%	35.5%	NS

*The number of homeowners providing a response for each issue ranged from 298 to 336.

Perspectives on Development

The survey asked homeowners to respond to several questions designed to gauge their attitudes about residential, commercial, and infrastructure development on Cape Cod. As shown in Table 25, residents were about evenly split between feeling that the amount of development generally is too much (44.8%) and about the right amount (45.9%). Few respondents felt that there is too little development on Cape Cod (9.3%).

Table 25. In general, do you think the amount of development on Cape Cod is too much, too little, or just the right amount? (n=386)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total
Too much	43.4%	44.3%	41.4%	56.5%	44.8%
Too little	9.0%	11.5%	6.9%	8.7%	9.3%
About the right amount	47.5%	44.3%	51.7%	34.8%	45.9%

Tables 26 and 27 show how respondents felt about the current level of residential development in their town and on the Cape as a whole. The majority of respondents (55.8%) felt the amount of residential development was just right in their town. When considering the Cape as a whole, however, respondents most frequently indicated too much residential development (42.9%), although a similar proportion felt the amount of residential development to be just right (41.3%). Year-round residents (about 14%) were more likely than seasonal residents (about 2%) to respond that the current level of residential development is not the right kind.

Table 26. Respondent feelings about the current level of residential development in their town (n=382)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total
Too much	33.6%	31.5%	27.9%	38.3%	32.2%
Too little	4.2%	7.7%	3.5%	0.0%	4.7%
Just right	54.6%	55.4%	58.1%	55.3%	55.8%
Not the right kind	7.6%	5.4%	10.5%	6.4%	7.3%

Table 27. Respondent feelings about the current level of residential development for the entire Cape (n=368)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total
Too much	39.5%	36.0%	45.9%	65.9%	42.9%
Too little	7.0%	8.8%	7.1%	2.3%	7.1%
Just right	46.5%	46.4%	34.1%	27.3%	41.3%
Not the right kind	7.0%	8.8%	12.9%	4.5%	8.7%

Tables 28 and 29 provide respondents' perspectives on the current level of commercial development in their town and on the Cape. The majority of respondents (52.4%) felt the amount of commercial development in their town was just right. However, for the Cape as a whole, 36.8% felt commercial development was just right, and 32.7% felt it was too much. Considering the entire Cape, approximately one-fourth of year-round residents felt there was too little commercial development, compared with about 11% of seasonal residents.

Table 28. Respondent feelings about the current level of commercial development in their town (n=382)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total
Too much	22.5%	23.8%	21.2%	17.0%	22.0%
Too little	25.0%	19.2%	15.3%	10.6%	19.2%
Just right	50.0%	48.5%	55.3%	63.8%	52.4%
Not the right kind	2.5%	8.5%	8.2%	8.5%	6.5%

Table 29. Respondent feelings about the current level of commercial development for the entire Cape (n=368)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total
Too much	30.1%	30.2%	32.1%	47.7%	32.7%
Too little	18.6%	20.6%	21.4%	11.4%	19.1%
Just right	40.7%	38.1%	35.7%	25.0%	36.8%
Not the right kind	10.6%	11.1%	10.7%	15.9%	11.4%

The survey asked respondents to consider several different types of housing and commercial structures, and the extent to which more of each type is needed in their town and on the entire Cape. These results are reported in Tables 30 through 33.

Table 30. Percentage of respondents who felt more of each housing type is needed in their town (n=358*)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total	Difference
Single family homes	24.8%	20.0%	18.8%	7.1%	19.7%	NS
2-family homes	11.7%	9.4%	3.9%	14.3%	9.5%	NS
Rental apartments	22.8%	19.2%	19.2%	23.8%	20.9%	NS
Condominiums	12.5%	6.8%	13.0%	2.4%	9.5%	NS
Auxiliary dwellings	3.6%	5.1%	6.4%	9.5%	5.5%	NS
Top-of-the-shop housing	11.6%	8.4%	13.0%	0.0%	9.4%	NS
Deed restricted low-income ownership housing	23.0%	32.8%	27.5%	37.2%	29.1%	NS
Deed restricted low-income rental housing	17.0%	20.7%	17.7%	38.1%	20.9%	Sig.

*The number of homeowners providing a response for each issue ranged from 346 to 358.

Few respondents indicated a need for more housing of any category. Deed restricted low-income ownership housing was the most frequently indicated shortage area for both respondents' town (29.1%) and the entire Cape (35.8%). Compared with other Cape Cod regions, residents of the Outer Cape more frequently reported a need for deed restricted low-income rental housing in their town, and Outer Cape residents indicated a need for more condominiums less frequently than their counterparts elsewhere. Compared with seasonal residents, year-round residents more frequently indicated a need for more rental apartments in their town, and for more 2-family homes and rental apartments on the Cape. Respondents aged 59 and under more frequently identified a need for top-of-the-shop housing on the Cape as a whole, compared with older respondents. Individuals with lower household incomes more frequently felt a need for more deed restricted low-income ownership housing in their town and for rental apartments on the entire Cape.

Table 31. Percentage of respondents who felt more of each housing type is needed for the entire Cape (n=358*)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total	Difference
Single family homes	24.8%	21.7%	14.3%	9.5%	19.6%	NS
2-family homes	17.7%	20.2%	6.4%	11.9%	15.3%	NS
Rental apartments	28.1%	31.4%	28.6%	21.4%	28.5%	NS
Condominiums	22.3%	18.3%	17.5%	2.4%	17.5%	Sig.
Auxiliary dwellings	8.1%	12.7%	3.9%	9.5%	8.9%	NS
Top-of-the-shop housing	16.2%	11.9%	10.3%	7.0%	12.3%	NS
Deed restricted low-income ownership housing	30.6%	40.8%	36.7%	32.6%	35.8%	NS
Deed restricted low-income rental housing	22.5%	32.5%	25.3%	35.7%	28.2%	NS

*The number of homeowners providing a response for each type ranged from 347 to 358.

Overall, no more than 24% of respondents felt a need for more of any type of commercial structure in their town, and no more than 29.8% felt a need for more of any kind of commercial structure on the Cape. More year-round than seasonal residents felt more light manufacturing structures were needed in their town or on the Cape, and more year-round residents felt a need for laboratory/R&D space locally. There were also some statistically significant differences among groups at different income levels. Respondents reporting a household income greater than $150,000 more frequently felt a need for more professional offices in their towns. These respondents, along with those reporting a household income of $65,000 or less, more frequently indicated a need for more medical offices and small retail structures in their towns. Lower income residents more frequently indicated a need for light manufacturing structures and laboratory/R&D space on the Cape.

Table 32. Percentage of respondents who felt more of each commercial structure type is needed in their town (n=359*)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total	Difference
Professional offices	8.0%	10.0%	13.8%	11.6%	10.4%	NS
Medical offices	22.3%	19.8%	24.4%	27.3%	22.6%	NS
Retail - Large	15.5%	15.0%	9.1%	2.4%	12.3%	NS
Retail - Small	30.7%	22.1%	16.5%	25.0%	24.0%	NS
Light manufacturing structures	23.4%	19.3%	12.8%	14.3%	18.6%	NS
Laboratory/R&D Space	21.6%	20.2%	17.9%	11.9%	19.1%	NS
Warehouses	8.2%	5.0%	5.1%	2.4%	5.7%	NS

*The number of homeowners providing a response for each type ranged from 349 to 359.

Table 33. Percentage of respondents who felt more of each commercial structure type is needed for the entire Cape (n=362*)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total	Difference
Professional offices	12.3%	10.9%	13.8%	14.0%	12.4%	NS
Medical offices	17.9%	18.5%	15.2%	26.2%	18.5%	NS
Retail - Large	21.6%	21.7%	16.3%	16.3%	19.8%	NS
Retail - Small	15.9%	18.2%	12.8%	11.6%	15.5%	NS
Light manufacturing structures	29.8%	36.8%	26.3%	16.3%	29.8%	NS
Laboratory/R&D Space	24.8%	28.9%	26.3%	25.0%	26.5%	NS
Warehouses	13.5%	7.6%	7.6%	7.1%	9.4%	NS

*The number of homeowners providing a response for each type ranged from 351 to 362.

The survey also solicited homeowners' level of support for several types of infrastructure development projects on Cape Cod. These results are shown in Table 34. Overall, most respondents (85.9%) indicated support for bike paths. A sewer treatment plant (70.9%) and a sewer collections system (65.3%) were the second and third most frequently supported projects. The types of infrastructure development with the least support were expansion of state-numbered roads (30.5%) and a public parking garage (31.2%).

Compared to homeowners in other regions, Outer Cape residents were least likely to support a third automobile bridge across the Cape Cod Canal, whereas the majority of Upper and Mid-Cape residents supported this project. More Upper Cape residents than residents of other regions supported expansion of state numbered roads and expansion of Rt. 6 before exit 9. Bike paths received more support from seasonal residents, and male respondents supported a sewer treatment plan and sewer collections system more frequently than female respondents.

Table 34. Percentage of respondents indicating they would strongly support or support each type of infrastructure development (n=369*)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total	Difference
A third automobile bridge across the Cape Cod Canal	56.4%	53.9%	49.4%	39.1%	51.8%	Sig.
Sewer treatment plant	71.9%	70.5%	75.9%	60.8%	70.9%	NS
Sewer collections system	68.5%	63.2%	69.9%	54.6%	65.3%	NS
Expansion of state-numbered roads (not including Rt. 6)	39.4%	26.0%	27.7%	27.3%	30.5%	Sig.
Expansion of Rt. 6 after exit 9	53.8%	59.1%	57.8%	41.9%	55.1%	NS
Expansion of Rt. 6 before exit 9	49.1%	34.9%	29.4%	28.9%	37.0%	Sig.
Improved commercial harbor facilities	63.3%	50.0%	43.9%	43.2%	51.8%	NS
A public parking garage	38.9%	31.5%	25.9%	21.7%	31.2%	NS
Bike paths	87.3%	83.1%	86.6%	89.1%	85.9%	Sig.

*The number of homeowners providing a response for each type ranged from 354 to 369.

Tables 35 through 38 show respondents' level of support for four broad regulatory goals concerning development, both in respondents' town and for the Cape as a whole. Overall, the greatest support was for making development easier in already-developed commercial areas but harder in less developed areas (59.5% for town, 63.5% for Cape), and support was least for making development easier everywhere (14.3% for town, 15.2% for Cape). Compared with Lower and Outer Cape residents, respondents in the Upper Cape and Mid-Cape regions more frequently indicated support for making development easier in already-developed residential areas but harder in less developed areas, and for making development easier everywhere. This was the case when respondents considered either their own town or the Cape more generally. Relative to seasonal residents, year-round residents more frequently indicated support for making development easier in their towns and on the Cape, although the difference between year-round and seasonal residents was not statistically significant for the goal of making development easier in already-developed residential areas but harder in less developed areas for the Cape as a whole.

Table 35. Percentage of respondents indicating they would strongly support or support each regulation for their own town (n=358*)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total	Difference
Make development easier in already-developed commercial areas but harder in less developed areas	67.3%	65.1%	45.0%	51.1%	59.5%	NS
Make development easier in already-developed residential areas but harder in less developed areas	48.2%	38.9%	23.8%	29.6%	37.1%	Sig.
Make development easier everywhere	17.0%	15.1%	11.3%	11.1%	14.3%	Sig.
Make development harder everywhere	31.4%	34.7%	40.8%	48.9%	36.8%	NS

*The number of homeowners providing a response for each regulation ranged from 353 to 358.

Table 36. Percentage of respondents indicating they would strongly support or support each regulation for the entire Cape (n=336*)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total	Difference
Make development easier in already-developed commercial areas but harder in less developed areas	68.5%	69.2%	50.7%	59.1%	63.5%	NS
Make development easier in already-developed residential areas but harder in less developed areas	51.7%	45.9%	29.7%	37.2%	42.7%	Sig.
Make development easier everywhere	18.1%	16.3%	12.0%	11.3%	15.2%	Sig.
Make development harder everywhere	30.1%	34.7%	41.7%	52.3%	37.3%	NS

*The number of homeowners providing a response for each regulation ranged from 330 to 336.

Table 37. Percentage of respondents (by year-round vs. seasonal residence) indicating they would strongly support or support each regulation for their own town (n=358*)

	Year-Round Residents	Seasonal Residents	Total	Difference
Make development easier in already-developed commercial areas but harder in less developed areas	67.0%	51.8%	59.5%	Sig.
Make development easier in already-developed residential areas but harder in less developed areas	42.9%	31.4%	37.1%	Sig.
Make development easier everywhere	16.6%	9.5%	14.3%	Sig.
Make development harder everywhere	35.4%	40.0%	36.8%	NS

*The number of homeowners providing a response for each regulation ranged from 353 to 358.

Table 38. Percentage of respondents (by year-round vs. seasonal residence) indicating they would strongly support or support each regulation for the entire Cape (n=336*)

	Year-Round Residents	Seasonal Residents	Total	Difference
Make development easier in already-developed commercial areas but harder in less developed areas	71.1%	53.1%	63.5%	Sig.
Make development easier in already-developed residential areas but harder in less developed areas	49.2%	36.4%	42.7%	NS
Make development easier everywhere	18.3%	10.0%	15.2%	Sig.
Make development harder everywhere	36.1%	39.7%	37.3%	NS

*The number of homeowners providing a response for each regulation ranged from 330 to 336.

The survey also solicited homeowners' level of support for or opposition to a list of potential development projects for both their own town and the entire Cape. Results of these questions are presented in Tables 39 through 42. Overall, support was greatest for a technology firm (81.3% for town, 87.2 % for Cape), a cultural facility (77.1% for town, 83.6% for Cape), a neighborhood business (73.0% for town, 74.7% for Cape), and a light industrial use development (67.7% for town, 76.6% for Cape). Support was least for a gambling casino (8.9% for town, 11.6% for Cape), a gravel-mining operation (10.2% for town, 11.6% for Cape), a multi-story residential building (10.4% for town, 16.6% for Cape), and a large shopping mall (13.4% for town, 19.2% for Cape).

For several types of development projects, statistically significant differences were evident in responses from homeowners in different regions, but only when considering development within their own towns. Compared with homeowners in the Lower and Outer Cape regions, Upper Cape and Mid-Cape residents had more favorable attitudes toward the following: a light industrial use development, a gravel-mining operation, a new 50-room motel or hotel, a commercial recreational use development, a gambling casino, a large discount store, a large supermarket, a clustered residential subdivision, a multi-story residential building, a mixed use development, and a conference facility. Upper Cape residents were more likely than others to support a marina with docking space for 100 boats, a national fast food-chain restaurant, and a large shopping mall. Outer Cape residents less frequently supported a large shopping mall, a typical residential subdivision, and an indoor/outdoor athletic field complex. Mid-Cape residents less frequently supported a roadside shopping plaza. Support for a golf course was greater among Upper and Lower Cape residents than Mid-Cape and Outer Cape residents. However, almost none of the development projects where there were statistically significant differences in support across regions had greater than 50% support in any given region; the exceptions are a light industrial use development, where the majority of respondents in all regions indicated support, and a marina, where a majority of Upper Cape respondents indicated support.

Differential support for development projects was also evident between year-round and seasonal homeowners, as indicated in Tables 40 and 42. In almost all cases where a statistically significant difference was found, year-round residents were more likely than seasonal residents to have a favorable opinion of the potential development. The only exception was for a cultural facility when considering that development for the entire Cape; in this case, slightly more seasonal residents (85.4%) than year-round residents (82.2%) supported the development, although the overwhelming majority of both categories supported a cultural facility.

Statistically significant differences were found for other subcategories of respondents as well. Compared with other age groups, respondents aged 59 and below less frequently supported a fast-food chain restaurant on the Cape and affordable housing in their town, and more frequently supported the development of a neighborhood business. Respondents with higher family incomes less frequently supported light industrial use developments and affordable housing in both their town and for entire Cape. Support for a casino and a large discount store was greater among respondents with annual household incomes of $85,000 and below, compared with wealthier respondents, and residents with incomes of $50,000 and below more frequently supported the development of a large shopping mall and a multi-story residential building in their town. There was also less support for a cultural facility for the entire Cape among those with incomes of $35,000 and below and between $85,001 and $100,000, than among residents in other income categories. In addition, male respondents were more likely than female respondents to support the development of a golf course in their town and a fast-food chain restaurant in their town or for the Cape, and were less likely to support affordable housing for both their own town and the entire Cape.

Table 39. Percentage of respondents indicating they would strongly support or support each kind of development if proposed for their town (n=361*)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total	Difference
A technology firm, such as software development	87.0%	85.0%	74.1%	69.8%	81.3%	NS
A light industrial use, such as a small manufacturing firm employing 25-50 people	72.0%	74.1%	56.7%	59.6%	67.7%	Sig.
A gravel-mining operation	11.5%	11.2%	8.9%	6.8%	10.2%	Sig.
A new 50-room motel or hotel	38.1%	24.0%	16.1%	13.9%	25.2%	Sig.
A cultural facility (e.g., concert hall, art gallery, or museum that would be open year-round)	81.3%	80.1%	71.9%	67.5%	77.1%	NS
Commercial recreational use (e.g., miniature golf course, water slide)	31.1%	30.7%	18.5%	15.9%	26.2%	Sig.
A marina with docking space for 100 boats	53.7%	44.4%	34.1%	42.8%	44.6%	Sig.
A golf course	31.8%	26.6%	32.1%	23.3%	29.0%	Sig.
A national fast-food chain restaurant	34.3%	21.2%	15.8%	18.2%	23.5%	Sig.
A gambling casino	13.1%	11.0%	4.8%	0.0%	8.9%	Sig.
A large shopping mall, such as the Cape Cod Mall	18.9%	13.6%	12.0%	2.2%	13.4%	Sig.
A roadside shopping plaza	22.8%	21.5%	14.3%	20.0%	20.1%	Sig.
A large discount store	33.0%	27.5%	15.8%	11.3%	24.5%	Sig.
A large supermarket	44.8%	39.7%	27.7%	31.8%	37.5%	Sig.
A neighborhood business such as a small food store, general store, or hardware store located in and serving a residential neighborhood	74.3%	71.8%	69.5%	79.6%	73.0%	NS
Affordable housing for low-and moderate-income people in single-family homes	52.9%	52.4%	59.5%	55.6%	54.5%	NS
Affordable housing for low-and moderate-income people in townhouses or duplexes	48.1%	47.3%	48.8%	50.0%	48.2%	NS
A typical residential subdivision on large lots	26.4%	25.6%	22.2%	15.9%	23.9%	Sig.
A clustered residential subdivision (smaller lots with large areas of protected open space)	49.0%	43.2%	35.4%	40.9%	42.9%	Sig.
A multi-story residential building	12.4%	14.5%	6.2%	2.2%	10.4%	Sig.
Mixed use development (e.g., residential units developed together with retail, restaurants, and other commercial space.)	38.8%	34.9%	23.8%	31.8%	33.1%	Sig.
Conference facility	36.9%	36.0%	26.3%	25.0%	32.7%	Sig.
Indoor/outdoor athletic field complex	48.6%	45.6%	44.6%	34.1%	44.8%	Sig.

*The number of homeowners providing a response for each kind of development ranged from 350 to 361.

Table 40. Percentage of respondents (by year-round vs. seasonal residence) indicating they would strongly support or support each kind of development if proposed for their town (n=361*)

	Year-Round Residents	Seasonal Residents	Total	Difference
A technology firm, such as software development	87.3%	73.2%	81.3%	Sig.
A light industrial use, such as a small manufacturing firm employing 25-50 people	74.5%	58.6%	67.7%	Sig.
A gravel-mining operation	13.0%	8.0%	10.2%	Sig.
A new 50-room motel or hotel	28.5%	21.0%	25.2%	Sig.
A cultural facility (e.g., concert hall, art gallery, or museum that would be open year-round)	74.8%	79.8%	77.1%	NS
Commercial recreational use (e.g., miniature golf course, water slide)	28.0%	23.1%	26.2%	NS
A marina with docking space for 100 boats	43.0%	45.3%	44.6%	NS
A golf course	26.0%	30.9%	29.0%	NS
A national fast-food chain restaurant	25.3%	20.0%	23.5%	Sig.
A gambling casino	10.2%	6.4%	8.9%	NS
A large shopping mall, such as the Cape Cod Mall	14.4%	8.5%	13.4%	Sig.
A roadside shopping plaza	18.7%	20.2%	20.1%	NS
A large discount store	25.6%	20.7%	24.5%	Sig.
A large supermarket	35.7%	39.2%	37.5%	NS
A neighborhood business such as a small food store, general store, or hardware store located in and serving a residential neighborhood	73.0%	76.3%	73.0%	NS
Affordable housing for low-and moderate-income people in single-family homes	59.7%	43.9%	54.5%	Sig.
Affordable housing for low-and moderate-income people in townhouses or duplexes	53.1%	39.2%	48.2%	Sig.
A typical residential subdivision on large lots	27.7%	17.3%	23.9%	Sig.
A clustered residential subdivision (smaller lots with large areas of protected open space)	43.9%	39.4%	42.9%	NS
A multi-story residential building	15.9%	4.3%	10.4%	Sig.
Mixed use development (e.g., residential units developed together with retail, restaurants, and other commercial space.)	37.0%	26.1%	33.1%	Sig.
Conference facility	30.6%	33.1%	32.7%	NS
Indoor/outdoor athletic field complex	40.5%	49.7%	44.8%	NS

*The number of homeowners providing a response for each kind of development ranged from 350 to 361.

Table 41. Percentage of respondents indicating they would strongly support or support each kind of development if proposed for the entire Cape (n=329*)						
	Upper Cape	**Mid-Cape**	**Lower Cape**	**Outer Cape**	**Total**	**Difference**
A technology firm, such as software development	87.7%	89.1%	84.4%	85.7%	87.2%	NS
A light industrial use, such as a small manufacturing firm employing 25-50 people	75.2%	78.3%	76.7%	73.8%	76.6%	NS
A gravel-mining operation	16.7%	14.7%	16.3%	11.9%	15.2%	NS
A new 50-room motel or hotel	46.6%	35.6%	41.1%	33.3%	39.6%	NS
A cultural facility (e.g., concert hall, art gallery, or museum that would be open year-round)	84.1%	85.7%	81.1%	80.5%	83.6%	NS
Commercial recreational use (e.g., miniature golf course, water slide)	39.8%	40.8%	36.5%	31.7%	38.4%	NS
A marina with docking space for 100 boats	61.4%	55.1%	42.4%	47.5%	53.0%	NS
A golf course	43.7%	33.7%	40.2%	37.5%	38.4%	NS
A national fast-food chain restaurant	35.3%	26.6%	26.0%	26.8%	28.9%	NS
A gambling casino	15.9%	12.4%	12.2%	0.0%	11.6%	NS
A large shopping mall, such as the Cape Cod Mall	22.2%	21.2%	16.4%	11.6%	19.2%	NS
A roadside shopping plaza	26.4%	27.4%	28.8%	19.5%	26.4%	NS
A large discount store	37.7%	35.6%	28.7%	28.0%	33.6%	NS
A large supermarket	48.8%	42.4%	40.0%	38.1%	43.1%	NS
A neighborhood business such as a small food store, general store, or hardware store located in and serving a residential neighborhood	76.4%	74.7%	70.6%	78.5%	74.7%	NS
Affordable housing for low-and moderate-income people in single-family homes	58.9%	61.4%	69.5%	69.8%	63.6%	NS
Affordable housing for low-and moderate-income people in townhouses or duplexes	50.0%	54.1%	58.9%	60.5%	54.9%	NS
A typical residential subdivision on large lots	32.2%	32.2%	29.6%	16.7%	29.6%	NS
A clustered residential subdivision (smaller lots with large areas of protected open space)	58.1%	51.7%	45.1%	47.6%	51.5%	NS
A multi-story residential building	15.4%	21.5%	18.1%	2.4%	16.6%	NS
Mixed use development (e.g., residential units developed together with retail, restaurants, and other commercial space.)	42.7%	46.1%	30.6%	51.3%	42.3%	NS
Conference facility	50.5%	45.7%	45.8%	47.6%	47.4%	NS
Indoor/outdoor athletic field complex	57.8%	52.5%	49.4%	50.0%	52.9%	NS

*The number of homeowners providing a response for each kind of development ranged from 315 to 329.

Table 42. Percentage of respondents (by year-round vs. seasonal residence) indicating they would strongly support or support each kind of development if proposed for the entire Cape (n=329*)

	Year-Round Residents	Seasonal Residents	Total	Difference
A technology firm, such as software development	91.1%	81.9%	87.2%	Sig.
A light industrial use, such as a small manufacturing firm employing 25-50 people	83.0%	68.5%	76.6%	Sig.
A gravel-mining operation	16.8%	13.5%	15.2%	NS
A new 50-room motel or hotel	41.2%	35.3%	39.6%	NS
A cultural facility (e.g., concert hall, art gallery, or museum that would be open year-round)	82.2%	85.4%	83.6%	Sig.
Commercial recreational use (e.g., miniature golf course, water slide)	38.9%	37.1%	38.4%	NS
A marina with docking space for 100 boats	53.6%	50.8%	53.0%	NS
A golf course	35.6%	40.7%	38.4%	NS
A national fast-food chain restaurant	31.8%	24.0%	28.9%	Sig.
A gambling casino	13.7%	8.0%	11.6%	NS
A large shopping mall, such as the Cape Cod Mall	20.1%	14.3%	19.2%	NS
A roadside shopping plaza	26.0%	26.1%	26.4%	NS
A large discount store	35.6%	29.3%	33.6%	Sig.
A large supermarket	41.1%	44.4%	43.1%	NS
A neighborhood business such as a small food store, general store, or hardware store located in and serving a residential neighborhood	74.6%	77.8%	74.7%	NS
Affordable housing for low-and moderate-income people in single-family homes	67.6%	55.7%	63.6%	Sig.
Affordable housing for low-and moderate-income people in townhouses or duplexes	57.2%	49.6%	54.9%	NS
A typical residential subdivision on large lots	31.8%	23.8%	29.6%	NS
A clustered residential subdivision (smaller lots with large areas of protected open space)	48.3%	51.6%	51.5%	NS
A multi-story residential building	21.4%	10.6%	16.6%	Sig.
Mixed use development (e.g., residential units developed together with retail, restaurants, and other commercial space.)	44.2%	37.1%	42.3%	NS
Conference facility	45.0%	46.7%	47.4%	NS
Indoor/outdoor athletic field complex	50.6%	54.4%	52.9%	NS

*The number of homeowners providing a response for each kind of development ranged from 315 to 329.

Town Projects

Respondents were asked to indicate their level of support or opposition for each of several town projects if citizens proposed that the town should increase taxes to fund the projects. Tables 43 and 44 provide these results. Overall, support was greater for the purchase of open space than for other projects, and there was the least amount of support for construction of public recreational facilities. With regard to purchasing land to improve public access to the shore, support was greatest among Outer Cape residents and least among Mid-Cape residents. Compared with year-round residents, seasonal residents more frequently indicated strong support or support for several town projects.

Table 43. Percentage of respondents indicating they would strongly support or support each town project if funded through a local tax increase (n=366*)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total	Difference
Preservation or restoration of historic buildings	50.9%	55.6%	62.9%	58.7%	56.2%	NS
Purchase of land to improve public access to the shore (both fresh and saltwater)	64.8%	59.0%	68.8%	73.3%	64.7%	Sig.
Purchase of open space for water supply protection	71.9%	79.4%	80.7%	80.5%	77.5%	NS
Purchase of open space for a variety of recreational uses such as walking, bicycling or picnicking	68.8%	67.0%	70.4%	73.9%	69.2%	NS
Construction of public recreational facilities such as ball fields, golf course, tennis courts, etc.	37.1%	30.1%	36.3%	31.1%	33.7%	NS
Purchase of land or buildings to provide affordable housing	35.3%	40.4%	45.1%	46.5%	40.7%	NS
Purchase of open space so it will remain open and not be developed	69.8%	71.7%	72.6%	82.6%	72.6%	NS
Construction of waste-water treatment facilities	56.9%	67.0%	60.7%	63.1%	62.1%	NS

*The number of homeowners providing a response for each project ranged from 344 to 366.

Table 44. Percentage of respondents (by year-round vs. seasonal residence) indicating they would strongly support or support each town project if funded through a local tax increase (n=366*)

	Year-Round Residents	Seasonal Residents	Total	Difference
Preservation or restoration of historic buildings	49.0%	63.0%	56.2%	Sig.
Purchase of land to improve public access to the shore (both fresh and saltwater)	62.4%	67.9%	64.7%	Sig.
Purchase of open space for water supply protection	76.3%	79.8%	77.5%	NS
Purchase of open space for a variety of recreational uses such as walking, bicycling or picnicking	62.6%	77.5%	69.2%	Sig.
Construction of public recreational facilities such as ball fields, golf course, tennis courts, etc.	25.0%	41.6%	33.7%	Sig.
Purchase of land or buildings to provide affordable housing	42.8%	34.1%	40.7%	NS
Purchase of open space so it will remain open and not be developed	67.4%	79.1%	72.6%	Sig.
Construction of waste-water treatment facilities	65.3%	57.6%	62.1%	NS

*The number of homeowners providing a response for each project ranged from 344 to 366.

Cape Cod Commission

The survey asked respondents a series of questions pertaining to the priorities and roles of the Cape Cod Commission. Results from these series of questions are presented in Tables 45 through 49.

Overall, respondents most frequently indicated as a high priority the following CCC goals: protect the Cape's drinking water quality (86.1%), protect the Cape's recreational waters and surface water quality (76.2%), and preserve and enhance the fishing and shellfishing industries on the Cape (69.8%). Among respondents in different regions, those with homes in the Outer Cape region were least likely to indicate a high priority for encouraging business to locate on the Cape or for encouraging the expansion of tourism. Seasonal residents more frequently than year-round residents prioritized historic preservation, the protection of water quality and open and scenic landscapes, and the preservation and enhancement of the fishing and shellfishing industries. Year-round residents more frequently than seasonal residents prioritized ensuring an adequate supply of affordable housing and encouraging businesses to locate on the Cape.

Table 45. Percentage of respondents indicating each goal should be a high priority for the Cape Cod Commission (n=357*)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total	Difference
Preservation and restoration of historic buildings	28.6%	27.4%	33.3%	37.0%	30.3%	NS
Ensure an adequate supply of affordable housing for Cape residents	33.3%	38.2%	32.4%	23.9%	33.6%	NS
Protect the Cape's drinking water quality	85.7%	83.1%	90.8%	87.2%	86.1%	NS
Protect the Cape's recreational waters and surface water quality	73.8%	76.2%	76.6%	80.9%	76.2%	NS
Encourage development to locate in specified already developed areas	30.4%	29.6%	27.4%	32.6%	29.7%	NS
Protect open space and scenic landscapes	62.0%	62.2%	65.3%	77.8%	64.8%	NS
Preserve and enhance the fishing and shell-fishing industries on the Cape	71.4%	63.5%	70.1%	82.6%	69.8%	NS
Preserve and enhance agriculture on the Cape	53.3%	48.8%	61.8%	65.2%	55.1%	NS
Encourage businesses to locate on the Cape	41.1%	44.9%	35.1%	10.9%	37.3%	Sig.
Encourage expansion of tourism on the Cape	34.9%	32.0%	25.0%	11.1%	28.7%	Sig.
Promote road improvements to ensure traffic safety and ease of travel	62.6%	56.7%	53.2%	51.1%	57.0%	NS
Improve public transportation such as buses, rail services, etc.	49.5%	47.2%	45.5%	46.7%	47.5%	NS
Improve bicycle and walking paths	52.4%	40.5%	49.4%	56.5%	48.0%	NS
Promote commuter rail service to Boston	56.2%	47.2%	50.6%	41.3%	49.9%	NS
Promote passenger rail service on or within Cape Cod	45.3%	35.7%	38.2%	38.3%	39.4%	NS
Support development of improved waste-water treatment facilities	55.3%	52.0%	50.6%	52.2%	52.7%	NS

*The number of homeowners providing a response for each goal ranged from 343 to 357.

The priority assigned to several goals differed significantly by age, income group, and sex as well. Respondents aged 59 and under were less likely than older respondents to assign a high priority to ensuring an adequate supply of affordable housing and to supporting development of improved wastewater treatment facilities, whereas respondents aged 70 and over were more likely to prioritize public transportation improvements. Individuals with higher incomes were more likely to prioritize improving bicycle and walking paths and protection of drinking water. Those with lower incomes, particularly $50,000 per year and below, more frequently prioritized ensuring an adequate supply of affordable housing. Finally, more female than male respondents indicated a high priority for preserving and enhancing agriculture on the Cape and for promoting passenger rail service on or within Cape Cod.

Table 46. Percentage of respondents (by year-round vs. seasonal residence) indicating each goal should be a high priority for the Cape Cod Commission (n=357*)

	Year-Round Residents	Seasonal Residents	Total	Difference
Preservation and restoration of historic buildings	22.6%	39.0%	30.3%	Sig.
Ensure an adequate supply of affordable housing for Cape residents	39.2%	26.1%	33.6%	Sig.
Protect the Cape's drinking water quality	82.8%	92.0%	86.1%	Sig.
Protect the Cape's recreational waters and surface water quality	69.6%	84.2%	76.2%	Sig.
Encourage development to locate in specified already developed areas	31.2%	28.0%	29.7%	NS
Protect open space and scenic landscapes	58.0%	73.7%	64.8%	Sig.
Preserve and enhance the fishing and shell-fishing industries on the Cape	64.1%	75.4%	69.8%	Sig.
Preserve and enhance agriculture on the Cape	53.6%	54.7%	55.1%	NS
Encourage businesses to locate on the Cape	47.2%	23.0%	37.3%	Sig.
Encourage expansion of tourism on the Cape	27.7%	28.3%	28.7%	NS
Promote road improvements to ensure traffic safety and ease of travel	54.7%	58.6%	57.0%	NS
Improve public transportation such as buses, rail services, etc.	51.8%	40.9%	47.5%	NS
Improve bicycle and walking paths	44.3%	52.2%	48.0%	NS
Promote commuter rail service to Boston	52.6%	44.6%	49.9%	NS
Promote passenger rail service on or within Cape Cod	41.5%	34.8%	39.4%	NS
Support development of improved waste-water treatment facilities	52.9%	52.9%	52.7%	NS

*The number of homeowners providing a response for each goal ranged from 343 to 357.

The survey also asked homeowners to share their level of support for several potential CCC regulations. The majority of respondents indicated support for all regulations. The three most frequently supported regulations were prohibiting the storage or use of hazardous materials or wastes in areas where they could pollute public water supply wells (94.2%); restricting new developments in or near wetlands, ponds, floodplains, dunes, and critical habitat areas (88.0%); and requiring new developments to use wastewater treatment systems that protect water quality (86.9%). The least frequently supported regulations were requiring developers of new commercial developments to offset low wages with support for affordable housing development on Cape Cod (52.0%) and requiring developers of new residential projects to provide 10% of units as affordable housing (57.7%).

Compared with homeowners in other regions, Outer Cape homeowners more frequently supported two regulations: limiting the size of development projects to reduce impacts on traffic congestion and safety, and requiring new residential subdivisions to cluster lots to preserve open space and protect sensitive resources on site. More seasonal than year-round residents supported assessing fees to developers in order to pay for the impacts of development on infrastructure and the natural environment, limiting the size of development projects to reduce impacts on traffic congestion and safety, requiring new buildings to conform to architecture styles that are in keeping with the character of Cape Cod, and requiring developers to set aside land as open space proportional to the new land developed.

Compared with residents in other age categories, those aged 70 and older more frequently supported requiring new buildings to conform to architecture styles that are in keeping with the character of Cape Cod and requiring flood-resistant constructions in coastal areas. Female respondents were more likely than male respondents to support or strongly support the following regulations: limiting the size of development projects to reduce impacts on traffic congestion and safety, requiring developers of new commercial developments to offset low wages with support for affordable housing development on Cape Cod, and prohibiting the storage or use of hazardous materials or wastes in areas where they could pollute public water supply wells.

Table 47. Percentage of respondents indicating they would strongly support or support each regulation if established by the Cape Cod Commission (n=352*)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total	Difference
Assessing fees to developers in order to pay for the impacts of development on infrastructure and the natural environment	75.5%	76.4%	84.9%	84.4%	79.1%	NS
Limiting the size of development projects to reduce impacts on traffic congestion and safety	87.7%	81.4%	83.5%	93.4%	85.4%	Sig.
Requiring new buildings to conform to architecture styles that are in keeping with the character of Cape Cod	81.1%	78.6%	82.4%	84.8%	80.9%	NS
Requiring developers of new residential projects to provide 10% of units as affordable housing	53.3%	56.0%	60.2%	68.1%	57.7%	NS
Requiring developers of new commercial developments to offset low wages with support for affordable housing development on Cape Cod	47.6%	53.7%	54.8%	53.2%	52.0%	NS
Requiring developers to set aside land as open space proportional to the new land developed	71.7%	76.6%	78.3%	80.4%	76.0%	NS
Requiring new residential subdivisions to cluster lots to preserve open space and protect sensitive resources on site	71.8%	78.9%	71.6%	84.7%	76.0%	Sig.
Requiring new developments to use waste-water treatment systems that protect water quality	87.6%	84.0%	86.5%	93.4%	86.9%	NS
Prohibiting the storage or use of hazardous materials or wastes in areas where they could pollute public water supply wells	91.5%	94.4%	95.9%	97.8%	94.2%	NS
Restricting new developments in or near wetlands, ponds, floodplains, dunes, and critical habitat areas	86.0%	87.9%	87.9%	93.5%	88.0%	NS
Directing new projects to existing developed areas with existing transportation and waste-water infrastructure by making development easier in those locations while making it more difficult in areas with significant natural and historic resources	73.0%	81.1%	72.6%	82.6%	77.1%	NS
Requiring flood resistant constructions in coastal areas	81.0%	79.2%	83.7%	69.6%	79.4%	NS

*The number of homeowners providing a response for each regulation ranged from 343 to 352.

Table 48. Percentage of respondents (by year-round vs. seasonal residence) indicating they would strongly support or support each regulation if proposed by the Cape Cod Commission (n=352*)

	Year-Round Residents	Seasonal Residents	Total	Difference
Assessing fees to developers in order to pay for the impacts of development on infrastructure and the natural environment	75.3%	82.8%	79.1%	Sig.
Limiting the size of development projects to reduce impacts on traffic congestion and safety	81.4%	91.3%	85.4%	Sig.
Requiring new buildings to conform to architecture styles that are in keeping with the character of Cape Cod	75.9%	86.2%	80.9%	Sig.
Requiring developers of new residential projects to provide 10% of units as affordable housing	57.1%	55.1%	57.7%	NS
Requiring developers of new commercial developments to offset low wages with support for affordable housing development on Cape Cod	53.4%	48.1%	52.0%	NS
Requiring developers to set aside land as open space proportional to the new land developed	71.8%	80.0%	76.0%	Sig.
Requiring new residential subdivisions to cluster lots to preserve open space and protect sensitive resources on site	72.5%	78.5%	76.0%	NS
Requiring new developments to use waste-water treatment systems that protect water quality	85.9%	87.5%	86.9%	NS
Prohibiting the storage or use of hazardous materials or wastes in areas where they could pollute public water supply wells	93.7%	94.1%	94.2%	NS
Restricting new developments in or near wetlands, ponds, floodplains, dunes, and critical habitat areas	85.5%	90.3%	88.0%	NS
Directing new projects to existing developed areas with existing transportation and waste-water infrastructure by making development easier in those locations while making it more difficult in areas with significant natural and historic resources	76.6%	76.8%	77.1%	NS
Requiring flood resistant constructions in coastal areas	76.9%	79.4%	79.4%	NS

*The number of homeowners providing a response for each regulation ranged from 343 to 352.

For each of several planning issues in which the CCC is involved, more respondents indicated the issue should be addressed at both town and regional levels. Natural disaster planning (approximately 75%) was the issue most frequently indicated as needing to be addressed at both the town and regional level. Land use planning was the issue most frequently indicated as needing to be addressed at the town level only (42.3%), although more respondents felt land use planning was an issue for both town and region (49.6%) than for town alone.

Table 49. Governance level at which respondents believed each planning issue should be addressed (n=358*)

	Town Level	Regional Level	Both
Land use planning	42.3%	8.2%	49.6%
Infrastructure planning	24.4%	18.4%	57.2%
Wastewater planning	17.0%	18.2%	64.8%
Sea Level Rise planning	10.3%	20.9%	68.9%
Natural disaster planning	7.0%	18.2%	74.8%
Infrastructure financing	16.7%	20.7%	62.6%
Building and management of waste-water infrastructure	13.0%	18.9%	68.2%

*The number of homeowners providing a response for each issue ranged from 353 to 358.

Water Quality

The survey asked respondents to indicate the activities they enjoy most living near the water. The survey also asked whether respondents have noticed any change in coastal or pond water quality in the past 10 years, and whether any water activities have changed as a consequence of any perceived change in water quality. These responses are reported in Tables 50 through 52.

Overall, respondents most frequently identified enjoying a water view (82.8%), and more than two-thirds reported enjoyment of swimming (69.8%). Mid-Cape residents (18.5%) were less likely than residents in the other regions (between 34.2% and 42.2%) to indicate enjoyment of shellfishing. About half of respondents reported noticing a change in coastal or pond water quality in the last 10 years, and about 60% indicated they have not changed or stopped recreational activities due to a perceived change in water quality.

For several water activities, statistically significant differences were evident between groups of respondents. Approximately 61% of respondents aged 70 and over enjoyed swimming, compared with at least 75% in each of the other age categories. Of respondents with incomes below $35,000, 25.8% enjoyed boating, compared with more than 46% for each income category above $50,000. In addition, more men (48.9%) than women (28%) enjoyed fishing, and more seasonal residents (82.6%) than year-round residents (63.2%) enjoyed swimming.

Table 50. Percentage of respondents who reported enjoying each water activity (n=379*)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total	Difference
Water view	81.7%	84.7%	81.9%	82.2%	82.8%	NS
Swimming	65.3%	69.8%	73.8%	74.5%	69.8%	NS
Fishing	43.4%	33.6%	38.0%	45.5%	39.1%	NS
Shellfishing	40.7%	18.5%	34.2%	42.2%	32.0%	Sig.
Boating	57.3%	44.0%	45.6%	59.1%	50.4%	NS
Don't know	2.7%	5.9%	2.6%	0.0%	3.5%	NS

*The number of homeowners providing a response for each activity ranged from 346 to 379.

Table 51. Have you noticed any change in coastal or pond water quality in the last 10 years? (n=368)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total
Yes	44.6%	49.6%	58.8%	55.3%	50.8%
No	35.7%	34.1%	28.8%	27.7%	32.6%
Don't know	19.6%	16.3%	12.5%	17.0%	16.6%

Table 52. Percentage of respondents who reported changing or stopping each activity because of a noticed change in coastal or pond water quality (n=372*)

	Upper Cape	Mid-Cape	Lower Cape	Outer Cape	Total	Difference
Water view	7.3%	1.7%	2.6%	4.8%	4.1%	NS
Swimming	13.6%	15.8%	16.7%	14.3%	15.1%	NS
Fishing	6.3%	5.1%	9.1%	9.5%	6.9%	NS
Shellfishing	12.5%	7.6%	3.9%	9.3%	8.6%	NS
Boating	0.9%	2.6%	5.2%	4.8%	2.9%	NS
Have not changed or stopped	55.2%	59.7%	63.0%	67.4%	59.9%	NS
Don't know	9.8%	11.1%	9.1%	2.4%	9.2%	NS

*The number of homeowners providing a response for each activity ranged from 345 to 372.

Comparison of Findings over Time

One of the aims of the Cape Cod Homeowner Survey is to enable comparisons in the responses of Cape Cod homeowners over time. Although changes in particular Cape Cod Commission informational needs have driven some alterations in the particular content and wording of survey questions in the surveys iterations over time, responses to many questions are directly comparable at multiple time points. This section of the report provides a comparison of 2014 survey results with those from 2005 and 1995 in instances where survey questions were repeated. (Appendix C provides an item-by-item comparison of the 2014 survey with the iteration conducted in 2005 and shows areas of direct overlap between the surveys.) The statistical significance of differences in response frequencies was also calculated in instances where question and response wording matched exactly between surveys at different time points. Comparative results are presented according to the particular focus of inquiry they represent.

Reasons for Living on Cape Cod

Table 53 shows a side-by-side comparison of the percentage of respondents in 2014, 2005, and 1995 who rated each of a list of factors as very important or important in their initial decision to live or maintain a residence on Cape Cod. Environmental quality and access to the coast have been prioritized by a relatively stable proportion of respondents across the surveys administered in 1995, 2005, and 2014. Similarly, the relative importance of nearness to Boston or Providence and shopping opportunities has not changed dramatically over time. The importance of reasonable taxes was indicated by a greater proportion of respondents in 2014 (86%) compared with 1995 (75%), and the importance of a good place to raise children decreased from 1995 (66%) to 2014 (43%). Results also show a trend of decreasing importance of job or economic opportunities, particularly between 2005 (51%) and 2014 (42%), and increasing importance of nearness of friends and relatives, which rose from 1995 to 2005, and again in 2014. Affordable housing was less frequently given importance as a draw to the Cape in 2014 (78%) than in 2005 (84%).

Table 53. Percentage of respondents in 2014, 2005, and 1995 rating each factor as very important or important when they first decided to live or maintain a residence on the Cape

	2014	2005	1995	1995 to 2014 Change	2005 to 2014 Change
Environmental quality (clean air and water)	93%	94%	95%	-2%	-1%
Access to the coast	90%	87%	86%	4%	3%
Reasonable taxes	86%	85%	75%	11%*	1%
Housing that you can afford	78%	84%	81%	-3%	-6%*
Good place to retire	73%	72%	NA	NA	1%
Outdoor recreational opportunities, such as fishing, hiking, boating, etc.	80%	77%	77%	3%	3%
Job or economic opportunities	42%	51%	50%	-8%*	-9%*
Good schools	47%	53%	NA	NA	-6%
Good place to raise children	43%	48%	66%	-23%*	-5%
Historic character of the Cape	71%	68%	NA	NA	3%
Public services	71%	67%	74%	-3%	4%
Nearness of friends or relatives	59%	52%	41%	18%*	7%*
Nearness to Boston or Providence	45%	43%	41%	4%	2%
Shopping opportunities	45%	48%	46%	-1%	-3%

* Indicates a statistically significant change between time points.

Note: NA indicates particular data that are not available because of differences in surveys at different time points.

Current and Future Problems

Tables 54 and 55 address changes between 2005 and 2014[7] in the identification of serious current problems facing respondents' towns and the entire Cape. Statistically significant changes occurred between 2005 and 2014 in the proportion of respondents who felt that several issues were serious problems in their town and on the Cape. In 2005, the most frequently identified serious town problem was traffic congestion (56.9%), whereas in 2014, it was coastal erosion (46.8%). For the Cape as a whole, traffic congestion was the most frequently indicated serious problem in both 2005 (73.2%) and 2014 (63.3%).

[7] A related question was asked on the 1995 survey, but changes in wording do not enable direct comparisons of the 1995 responses with more recent ones.

Table 54. Percentage of respondents in 2014 and 2005 rating each issue as current serious problem in their town

	2014	2005	2005 to 2014 Change
Residential sprawl	12.8%	36.5%	-23.7%*
Commercial sprawl	15.8%	33.0%	-17.2%*
Traffic congestion	44.6%	56.9%	-12.3%*
Adequacy of town services	6.1%	11.0%	-4.9%*
Loss of open space	26.9%	40.9%	-14.0%*
Quality of education	10.5%	16.9%	-6.4%*
Availability of moderate and lower-priced housing	25.3%	55.4%	-30.1%*
Pollution of drinking water supply	29.6%	33.3%	-3.7%
Pollution of ponds or coastal waters	40.9%	45.0%	-4.1%
Coastal erosion	46.8%	34.6%	12.2%*
Air pollution	12.8%	25.9%	-13.1%*
Taxes	24.4%	34.3%	-9.9%*
Availability of job or economic opportunities	40.2%	39.0%	1.2%
Loss of historic character	17.7%	23.3%	-5.6%*
Cost of waste-water treatment	27.9%	19.6%	8.3%*
Cost of solid waste disposal	31.1%	24.2%	6.9%*
Availability of public transportation	22.3%	36.4%	-14.1%*
Availability of recreational opportunities	5.4%	4.9%	0.5%
Adequacy of healthcare facilities	11.8%	10.3%	1.5%
Availability of high-speed Internet access	13.3%	6.4%	6.9%*

* Indicates a statistically significant change between time points.

The extent to which issues were perceived as current serious problems decreased between 2005 and 2014 for residential and commercial sprawl, traffic congestion, adequacy of town services, loss of open space, quality of education, availability of moderate and lower-priced housing, air pollution, taxes, loss of historic character, and availability of public transportation. Increases in the proportion of residents considering an issue to be a serious problem increased for coastal erosion, cost of wastewater treatment and solid waste disposal, and availability of high-speed Internet access. The direction of change was the same when respondents considered both their own town and the entire Cape, although for the entire Cape, the difference between 2005 and 2014 was not statistically significant for adequacy of town services or loss of historic character.

Table 55. Percentage of respondents in 2014 and 2005 rating each issue as current serious problem for the entire Cape

	2014	2005	2005 to 2014 Change
Residential sprawl	22.0%	47.8%	-25.8%*
Commercial sprawl	25.4%	44.2%	-18.8%*
Traffic congestion	63.3%	73.2%	-9.9%*
Adequacy of town services	7.9%	10.9%	-3.0%
Loss of open space	34.1%	50.8%	-16.7%*
Quality of education	13.4%	20.2%	-6.8%*
Availability of moderate and lower-priced housing	30.7%	59.1%	-28.4%*
Pollution of drinking water supply	33.0%	39.4%	-6.4%
Pollution of ponds or coastal waters	46.9%	46.8%	0.1%
Coastal erosion	58.1%	49.4%	8.7%*
Air pollution	15.8%	27.3%	-11.5%*
Taxes	20.7%	31.7%	-11.0%*
Availability of job or economic opportunities	44.6%	42.8%	1.8%
Loss of historic character	24.6%	27.1%	-2.5%
Cost of waste-water treatment	35.4%	24.1%	11.3%*
Cost of solid waste disposal	36.1%	29.5%	6.6%*
Availability of public transportation	26.4%	39.4%	-13.0%*
Availability of recreational opportunities	5.3%	5.2%	0.1%
Adequacy of healthcare facilities	12.4%	12.7%	-0.3%
Availability of high-speed Internet access	15.0%	5.5%	9.5%*

* Indicates a statistically significant change between time points.

In Tables 56 and 57, the proportion of respondents indicating particular issues will be serious problems in the next five years is compared for the 2014, 2005, and 1995 iterations of the homeowner survey. Considering both respondents' own towns and the Cape as a whole, traffic congestion was the most frequently rated serious problem across all time points, although a small decrease was statistically significant between 2005 (91.0%) and 2014 (84.7%) respondents when considering their own town. Between 1995 and 2014, the most notable changes in the perception of serious town problems occurred for adequacy of town services (69.0% in 1995 rated this a serious problem, compared with 40.6% in 2014); quality of education (57.0% in 1995, 39.1% in 2014); and pollution of the drinking water supply (77.0% in 1995, 60.6% in 2014). Between 2005 and 2014, the most notable changes were a 22.6% increase in the proportion of residents who considered availability of high speed Internet access a serious town problem; a 22.1% decrease in the proportion of residents considering residential sprawl a serious town problem, and a 19.1% increase in the proportion identifying the cost of wastewater treatment as a serious future town problem.

Table 56. Percentage of respondents in 2014, 2005, and 1995 indicating each issue will be a serious problem in their town in the next five years

	2014	2005	1995	1995 to 2014 Change	2005 to 2014 Change
Residential sprawl	48.0%	70.1%	NA	NA	-22.1%*
Commercial sprawl	48.1%	56.0%	NA	NA	-7.9%*
Traffic congestion	84.7%	91.0%	89.0%	-4.3%	-6.3%*
Adequacy of town services	40.6%	43.4%	69.0%	-28.4%*	-2.8%
Loss of open space	56.5%	64.8%	70.0%	-13.5%*	-8.3%*
Quality of education	39.1%	41.0%	57.0%	-17.9%*	-1.9%
Availability of moderate and lower-priced housing	62.8%	77.0%	64.0%	-1.2%	-14.2%*
Pollution of drinking water supply	60.6%	59.4%	77.0%	-16.4%*	1.2%
Pollution of ponds or coastal waters	72.3%	73.6%	69.0%	3.3%	-1.3%
Coastal erosion	78.2%	60.1%	64.0%	14.2%*	18.1%*
Air pollution	38.8%	52.6%	38.0%	0.8%	-13.8%*
Taxes	69.5%	69.8%	85.0%	-15.5%*	-0.3%
Availability of job or economic opportunities	74.8%	66.3%	73.0%	1.8%	8.5%*
Loss of historic character	45.0%	45.7%	59.0%	-14.0%*	-0.7%
Cost of waste-water treatment	76.6%	57.5%	80.0%	-3.4%	19.1%*
Cost of solid waste disposal	76.3%	64.2%	81.0%	-4.7%	12.1%*
Availability of public transportation	53.3%	57.4%	61.0%	-7.7%*	-4.1%
Availability of recreational opportunities	20.2%	17.9%	28.0%	-7.8%*	2.3%
Adequacy of healthcare facilities	41.6%	39.4%	41.0%	0.6%	2.2%
Availability of high-speed Internet access	34.0%	11.4%	NA	NA	22.6%*

* Indicates a statistically significant change between time points.

Note: NA indicates particular data that are not available because of differences in surveys at different time points.

Similarly, considering Cape Cod as an entity, the three most notable changes between 1995 and 2014 were a 26.3% decrease in the percentage of respondents calling adequacy of town services a serious future problem; a 15.7% decrease in the percentage identifying loss of historic character; and a 14.7% decrease in the pollution of the drinking water supply. Over a shorter term, between 2005 and 2014, the availability of high speed Internet access was identified as a future problem by 23.8% more respondents. The proportion identifying the cost of wastewater treatment increased substantially as well, but those who considered residential sprawl a serious future problem were a smaller proportion of respondents in 2014 than in 2005.

Table 57. Percentage of respondents in 2014, 2005, and 1995 indicating each issue will be a serious problem for the entire Cape in the next five years

	2014	2005	1995	1995 to 2014 Change	2005 to 2014 Change
Residential sprawl	62.3%	79.0%	NA	NA	-16.7%*
Commercial sprawl	66.9%	71.8%	NA	NA	-4.9%
Traffic congestion	92.9%	94.3%	95.0%	-2.1%	-1.4%
Adequacy of town services	49.7%	47.0%	76.0%	-26.3%*	2.7%
Loss of open space	69.3%	75.2%	80.0%	-10.7%*	-5.9%
Quality of education	49.5%	50.0%	62.0%	-12.5%*	-0.5%
Availability of moderate and lower-priced housing	68.8%	82.5%	69.0%	-0.2%	-13.7%*
Pollution of drinking water supply	68.3%	66.7%	83.0%	-14.7%*	1.6%
Pollution of ponds or coastal waters	76.9%	78.3%	75.0%	1.9%	-1.4%
Coastal erosion	86.1%	73.5%	85.0%	1.1%	12.6%*
Air pollution	42.8%	55.1%	43.0%	-0.2%	-12.3%*
Taxes	74.9%	72.0%	85.0%	-10.1%*	2.9%
Availability of job or economic opportunities	80.6%	72.2%	74.0%	6.6%*	8.4%*
Loss of historic character	55.3%	55.3%	71.0%	-15.7%*	0.0%
Cost of waste-water treatment	81.7%	64.2%	86.0%	-4.3%	17.5%*
Cost of solid waste disposal	79.4%	68.9%	85.0%	-5.6%*	10.5%*
Availability of public transportation	59.5%	63.5%	69.0%	-9.5%*	-4.0%
Availability of recreational opportunities	21.7%	20.0%	28.0%	-6.3%*	1.7%
Adequacy of healthcare facilities	47.2%	44.7%	46.0%	1.2%	2.5%
Availability of high-speed Internet access	35.5%	11.7%	NA	NA	23.8%*

* Indicates a statistically significant change between time points.

Note: NA indicates particular data that are not available because of differences in surveys at different time points.

Development

Table 58 shows how homeowners' attitudes toward several different types of development projects have changed over time. At all three time points, development of a technology firm and a cultural facility garnered greater levels of support from residents than other types of project. Between 1995 and 2014, there was an 11% decline in the proportion of respondents supporting development of affordable housing in single family homes, and there was a current 7% decline in the level of support for a large discount store. During the same stretch of time, the level of support for both a marina and a clustered residential subdivision increased by 10 percentage points. Between 2005 and 2014, the most notable changes were decreases in support for affordable housing in both single family homes (70% in 2005, compared with 55% in 2014) and townhouses and duplexes (57% in 2005, compared with 48% in 2014), as well as a 10% decrease in support for a typical residential subdivision.

Table 58. Percentage of respondents in 2014, 2005, and 1995 indicating they would strongly support or support each kind of development if proposed for their town

	2014	2005	1995	1995 to 2014 Change	2005 to 2014 Change
A technology firm, such as software development	81%	75%	82%	-1%	6%*
A light industrial use, such as a small manufacturing firm employing 25-50 people	68%	70%	70%	-2%	-2%
A gravel-mining operation	10%	12%	7%	3%	-2%
A new 50-room motel or hotel	25%	26%	21%	4%	-1%
A cultural facility (e.g., concert hall, art gallery, or museum that would be open year-round)	77%	79%	79%	-2%	-2%
Commercial recreational use (e.g., miniature golf course, water slide)	26%	21%	23%	3%	5%
A marina with docking space for 100 boats	45%	39%	35%	10%*	6%
A golf course	29%	33%	34%	-5%	-4%
A national fast-food chain restaurant	24%	18%	19%	5%	6%*
A gambling casino	9%	11%	NA	NA	-2%
A large shopping mall, such as the Cape Cod Mall	13%	13%	18%	-5%	0%
A roadside shopping plaza	20%	18%	21%	-1%	2%
A large discount store	25%	29%	31%	-7%*	-5%
A large supermarket	38%	33%	NA	NA	5%
A neighborhood business such as a small food store, general store, or hardware store located in and serving a residential neighborhood	73%	75%	69%	4%	-2%
Affordable housing for low- and moderate-income people in single-family homes	55%	70%	65%	-11%*	-16%*
Affordable housing for low- and moderate-income people in townhouses or duplexes	48%	57%	48%	0%	-9%*
A typical residential subdivision on large lots	24%	34%	26%	-2%	-10%*
A clustered residential subdivision (smaller lots with large areas of protected open space)	43%	47%	33%	10%*	-4%
A multi-story residential building	10%	15%	NA	NA	-5%*

* Indicates a statistically significant change between time points.

Note: NA indicates particular data that are not available because of differences in surveys at different time points.

Town Projects

Surveys in 2014 and 2005[8] asked homeowners to indicate their level of support for a several potential town projects if citizens proposed that the town increase taxes in order to increase funding for these projects. Responses were generally quite similar between 2005 and 2014. At both time points, the most favorable project seemed to be the purchase of open space for water supply protection, although the proportion of respondents supporting this project decreased from 86% in 2005 to 78% in 2014. Least favorable in both 2005 and 2014 was the construction of public recreational facilities. Although 7% more homeowners supported purchasing land to improve access to the shore in 2014 compared with 2005, the level of support for the purchase of land or buildings for affordable housing declined from 51% to 41% during this time period.

Table 59. Percentage of respondents in 2014 and 2005 indicating they would strongly support or support each town project if funded through a local tax increase

	2014	2005	2005 to 2014 Change
Preservation or restoration of historic buildings	56%	54%	2%
Purchase of land to improve public access to the shore (both fresh and saltwater)	65%	58%	7%*
Purchase of open space for water supply protection	78%	86%	-8%*
Purchase of open space for a variety of recreational uses such as walking, bicycling or picnicking	69%	67%	3%
Construction of public recreational facilities such as ball fields, golf course, tennis courts, etc.	34%	39%	-5%
Purchase of land or buildings to provide affordable housing	41%	51%	-10%*
Purchase of open space so it will remain open and not be developed	73%	76%	-3%
Construction of waste-water treatment facilities	62%	60%	2%

* Indicates a statistically significant change between time points.

Cape Cod Commission

As shown in Table 60, across time periods, the most frequently highly prioritized CCC goal – protecting the Cape's drinking water quality – remained stable. The least frequently highly prioritized goal, encouraging expansion of tourism on the Cape, increased in priority over time (from 19% in 1995 to 29% in 2014), although across all three time periods, this was still the least likely goal to be considered a high priority by respondents. The level of priority given to historic preservation decreased from 60% in 1995 to 30% in 2014, and ensuring affordable housing diminished in priority from 2005 to 2014. More residents in 2014 prioritized the improvement of bicycle and walking paths than in 2005, and more residents rated encouraging businesses to locate on Cape Cod as a high priority in 2014 than in both prior years.

[8] A related question was asked on the 1995 survey, but changes in wording do not enable direct comparisons of the 1995 responses with more recent ones.

Table 60. Percentage of respondents in 2014, 2005, and 1995 indicating each goal should be a high priority for the Cape Cod Commission

	2014	2005	1995	1995 to 2014 Change	2005 to 2014 Change
Preservation and restoration of historic buildings	30%	28%	60%	-30%*	2%
Ensure an adequate supply of affordable housing for Cape residents	34%	43%	28%	6%	-9%*
Protect the Cape's drinking water quality	86%	90%	89%	-3%	-4%
Protect the Cape's recreational waters and surface water quality	76%	80%	NA	NA	-3%
Encourage development to locate in specified already developed areas	30%	29%	26%	4%	1%
Protect open space and scenic landscapes	65%	68%	67%	-2%	-3%
Preserve and enhance the fishing and shell-fishing industries on the Cape	70%	74%	69%	1%	-4%
Preserve and enhance agriculture on the Cape	55%	49%	NA	NA	6%
Encourage businesses to locate on the Cape	37%	27%	24%	13%*	10%*
Encourage expansion of tourism on the Cape	29%	21%	19%	10%*	7%*
Promote road improvements to ensure traffic safety and ease of travel	57%	62%	53%	4%	-5%
Improve public transportation such as buses, rail services, etc.	48%	50%	43%	5%	-2%
Improve bicycle and walking paths	48%	36%	NA	NA	12%*
Promote commuter rail service to Boston	50%	48%	NA	NA	2%
Promote passenger rail service on or within Cape Cod	39%	36%	NA	NA	3%
Support development of improved waste-water treatment facilities	53%	51%	NA	NA	1%

* Indicates a statistically significant change between time points.

Note: NA indicates particular data that are not available because of differences in surveys at different time points.

Table 61 shows the level of support respondents have had for several potential CCC regulations over time. Across time periods, respondents showed the greatest level of support for prohibiting the storage or use of hazardous materials or wastes in areas where they could pollute wells, and the least support for requiring developers of new residential projects to reserve 10% of units as affordable housing. In general, responses were very similar between 2005 and 2014, indicating stability in opinion on most regulations.

Table 61. Percentage of respondents in 2014, 2005, and 1995 indicating they would strongly support or support each regulation if established by the Cape Cod Commission

	2014	2005	1995	1995 to 2014 Change	2005 to 2014 Change
Limiting the size of development projects to reduce impacts on traffic congestion and safety	85%	84%	83%	2%	1%
Requiring new buildings to conform to architecture styles that are in keeping with the character of Cape Cod	81%	83%	64%	17%*	-2%
Requiring developers of new residential projects to provide 10% of units as affordable housing	58%	65%	43%	15%*	-7%*
Requiring new residential subdivisions to cluster lots to preserve open space and protect sensitive resources on site	76%	77%	55%	21%*	-1%
Requiring new developments to use waste-water treatment systems that protect water quality	87%	90%	76%	11%*	-3%
Prohibiting the storage or use of hazardous materials or wastes in areas where they could pollute public water supply wells	94%	92%	90%	4%	2%
Restricting new developments in or near wetlands, ponds, floodplains, dunes, and critical habitat areas	88%	88%	85%	3%	0%

* Indicates a statistically significant change between time points.

Conclusion

This report provided results from the 2014 Cape Cod Homeowner Survey, which was designed to inform the work of the Cape Cod Commission by gauging homeowners' opinions on a range of planning and development issues. A total of 389 homeowners from a usable random sample of 1,637 homeowners from all 15 of Cape Cod's towns completed the survey in the fall of 2014.

The survey results highlight several key planning and development priorities, but also point to important challenges in addressing these issues. More specifically, results show relatively high levels of concern for traffic congestion; coastal erosion; the availability of jobs and economic opportunities and affordable housing, particularly for year-round residents; pollution of ponds and coastal waters; and wastewater treatment and solid waste disposal.

However, although results indicate homeowners' willingness to support municipal tax increases for land acquisition that addresses water supply protection, open space preservation, or recreation, there is limited support for specific solutions to some key problems. For instance, results show that, although traffic congestion has been identified consistently as a top current and future planning and development challenge for Cape Cod and its towns, the level of support for specific approaches to alleviating congestion (such as a third automobile bridge and expansion of major roads) is not strong. Similarly, the majority of survey respondents indicate a concern for the availability of moderate and lower-priced housing, but the level of support appears to be low for particular regulatory or fiscal interventions to improve the supply of affordable housing. Generally, greater levels of consensus appear to exist regarding preserving the environmental resources that have drawn many residents to Cape Cod and controlling waste and its related costs, and these activities were indicated frequently as top priorities for the Cape Cod Commission.

Although the extent to which homeowners expressed concerns about development issues varied substantially, there generally was not much support for new residential development or for large commercial development, and homeowners did not frequently indicate residential or commercial development issues as high priorities for the Cape Cod Commission. However, results suggest support—especially year-round homeowners and those in the more populous Upper & Mid Cape towns – for easing development restrictions in already developed commercial areas, while increasing restrictions for development of undeveloped areas. Homeowners displayed favorable opinions regarding some forms of non-residential development, including small neighborhood businesses, a cultural facility, and bike paths.

Results indicate that homeowners were initially attracted to the Cape for a diversity of reasons and have varied opinions on a range of development and planning topics. However, across time periods, regions, and demographic groups, Cape Cod homeowners appear generally to share a particular appreciation of the Cape's natural resources and recreational opportunities.

Appendix A

Cape Cod Homeowner Survey 2014

Cape Cod Homeowner's Survey 2014

Every five years, the Cape Cod Commission initiates an update to it's Regional Policy Plan (RPP). This RPP is what defines the regional development goals, standards, and objectives for Barnstable County. The following survey questions are designed to inform this update concerning resident and visitor attitudes and concerns about the built and natural environment on Cape Cod as well as it's economic development.

GETTING YOUR PERSPECTIVE

1. When you first decided to live or maintain a residence on Cape Cod, how important to you personally were the following factors in making this decision?

	Very Important	Important	Not Very Important	Not At All Important
a. Job or economic opportunities	O	O	O	O
b. Good place to raise children	O	O	O	O
c. Good schools	O	O	O	O
d. Nearness of friends or relatives	O	O	O	O
e. Nearness to Boston or Providence	O	O	O	O
f. Housing that you can afford	O	O	O	O
g. Reasonable taxes	O	O	O	O
h. Public services	O	O	O	O
i. Environmental quality (clean air and water)	O	O	O	O
j. Access to the coast	O	O	O	O
k. Outdoor recreational opportunities, such as fishing, hiking, boating, etc.	O	O	O	O
l. Shopping opportunities	O	O	O	O
m. Good place to retire	O	O	O	O
n. Historic character of the Cape	O	O	O	O

2. In general, do you think the amount of development on Cape Cod is too much, too little, or about the right amount?

- O Too much
- O Too little
- O About the right amount

3. How do you feel about the current level of residential development **in your town** and **for the entire Cape**?

	Too Much	Too Little	Just Right	Not the Right Kind
In your town	O	O	O	O
For the entire Cape	O	O	O	O

4. How do you feel about the current level of commercial development **in your town** and **for the entire Cape**?

	Too Much	Too Little	Just Right	Not the Right Kind
In your town	O	O	O	O
For the entire Cape	O	O	O	O

5. Do you feel we need more of any type of housing **in your town** and/or **for the entire cape**? *(Choose all that apply.)*

	In Your Town	For the Entire Cape
a. Single family homes	O	O
b. 2 family homes	O	O
c. Rental apartments	O	O
d. Condominiums	O	O
e. Auxiliary dwellings	O	O
f. Top-of-the-shop housing	O	O
g. Deed restricted low-income ownership housing	O	O
h. Deed restricted low-income rental housing	O	O

6. Do you feel we need more of any type of commercial structures **in your town** and/or **for the entire cape**? *(Choose all that apply.)*

	In Your Town	For the Entire Cape
a. Professional offices	O	O
b. Medical offices	O	O
c. Retail - Large	O	O
d. Retail - Small	O	O
e. Light manufacturing structures	O	O
f. Laboratory/R&D space	O	O
g. Warehouses	O	O

7. Consider the issues listed below. For each one, please indicate the extent to which you think it is currently a problem **for your town** and **for the entire Cape**.

	In Your Town			For the Entire Cape		
	Serious Problem	Moderate Problem	Not a Problem	Serious Problem	Moderate Problem	Not a Problem
a. Residential sprawl	O	O	O	O	O	O
b. Commercial sprawl	O	O	O	O	O	O
c. Traffic congestion	O	O	O	O	O	O
d. Adequacy of town services	O	O	O	O	O	O
e. Loss of open space	O	O	O	O	O	O
f. Quality of education	O	O	O	O	O	O
g. Availability of moderate and lower-priced housing	O	O	O	O	O	O
h. Pollution of drinking water supply	O	O	O	O	O	O
i. Pollution of ponds or coastal waters	O	O	O	O	O	O
j. Coastal erosion	O	O	O	O	O	O
k. Air pollution	O	O	O	O	O	O
l. Taxes	O	O	O	O	O	O
m. Availability of job or economic opportunities	O	O	O	O	O	O
n. Loss of historic character	O	O	O	O	O	O

7. *(Continued from previous page)* Consider the issues listed below. For each one, please indicate the extent to which you think it is currently a problem **for your town** and **for the entire Cape**.

	In Your Town			For the Entire Cape		
	Serious Problem	**Moderate Problem**	**Not a Problem**	**Serious Problem**	**Moderate Problem**	**Not a Problem**
o. Cost of wastewater treatment	O	O	O	O	O	O
p. Cost of solid waste disposal	O	O	O	O	O	O
q. Availability of public transportation	O	O	O	O	O	O
r. Availability of recreational opportunities	O	O	O	O	O	O
s. Adequacy of healthcare facilities	O	O	O	O	O	O
t. Availability of high-speed Internet access	O	O	O	O	O	O

8. Again, consider the issues listed below **for your town** and **for the entire Cape**. For each one, please indicate whether you think it will be a serious problem or will not be a serious problem, in the next 5 years.

	In Your Town		For the Entire Cape	
	Will be a Problem	**Will Not be a Problem**	**Will be a Problem**	**Will Not be a Problem**
a. Residential sprawl	O	O	O	O
b. Commercial sprawl	O	O	O	O
c. Traffic congestion	O	O	O	O
d. Adequacy of town services	O	O	O	O
e. Loss of open space	O	O	O	O
f. Quality of education	O	O	O	O
g. Availability of moderate and lower-priced housing	O	O	O	O
h. Pollution of drinking water supply	O	O	O	O
i. Pollution of ponds or coastal waters	O	O	O	O
j. Coastal erosion	O	O	O	O
k. Air pollution	O	O	O	O
l. Taxes	O	O	O	O
m. Availability of job or economic opportunities	O	O	O	O
n. Loss of historic character	O	O	O	O
o. Cost of wastewater treatment	O	O	O	O
p. Cost of solid waste disposal	O	O	O	O
q. Availability of public transportation	O	O	O	O
r. Availability of recreational opportunities	O	O	O	O
s. Adequacy of healthcare facilities	O	O	O	O
t. Availability of high-speed Internet access	O	O	O	O

9. Please indicate the extent to which you would support or oppose the following kinds of development if they were proposed **for you town** and **for the entire Cape**. Assume that all the proposed developments would meet current zoning and environmental regulations.

	In Your Town					For the Entire Cape				
	Strongly Support	**Support**	**Unsure**	**Oppose**	**Strongly Oppose**	**Strongly Support**	**Support**	**Unsure**	**Oppose**	**Strongly Oppose**
a. A technology firm, such as software development	○	○	○	○	○	○	○	○	○	○
b. A light industrial use, such as a small manufacturing firm employing 25-50 people	○	○	○	○	○	○	○	○	○	○
c. A gravel-mining operation	○	○	○	○	○	○	○	○	○	○
d. A new 50-room motel or hotel	○	○	○	○	○	○	○	○	○	○
e. A cultural facility (e.g., concert hall, art gallery or museum that would be open year-round)	○	○	○	○	○	○	○	○	○	○
f. Commercial recreational use (e.g., miniature golf course, water slide)	○	○	○	○	○	○	○	○	○	○
g. A marina with docking space for 100 boats	○	○	○	○	○	○	○	○	○	○
h. A golf course	○	○	○	○	○	○	○	○	○	○
i. A national fast-food chain restaurant	○	○	○	○	○	○	○	○	○	○
j. A gambling casino	○	○	○	○	○	○	○	○	○	○
k. A large shopping mall (e.g., Cape Cod Mall)	○	○	○	○	○	○	○	○	○	○
l. A roadside shopping plaza	○	○	○	○	○	○	○	○	○	○
m. A large discount store	○	○	○	○	○	○	○	○	○	○
n. A large supermarket	○	○	○	○	○	○	○	○	○	○
o. A neighborhood business (e.g., small food store, general store, hardware store) located in and serving a residential neighborhood	○	○	○	○	○	○	○	○	○	○
p. Affordable housing for low-and moderate-income people in single-family homes	○	○	○	○	○	○	○	○	○	○
q. Affordable housing for low-and moderate-income people in townhouses or duplexes	○	○	○	○	○	○	○	○	○	○
r. A typical residential subdivision on larger lots	○	○	○	○	○	○	○	○	○	○
s. A clustered residential subdivision (smaller lots with larges areas of protected open space)	○	○	○	○	○	○	○	○	○	○
t. A multi-story residential building	○	○	○	○	○	○	○	○	○	○
u. A mixed use development (i.e., residential units developed together with retail, restaurants, and other commercial space.)	○	○	○	○	○	○	○	○	○	○
v. A conference facility	○	○	○	○	○	○	○	○	○	○
w. An indoor/outdoor athletic field complex	○	○	○	○	○	○	○	○	○	○

10. To what extent do you support or oppose the following infrastructure development?

	Strongly Support	Support	Unsure	Oppose	Strongly Oppose
a. A third automobile bridge across the Cape Cod Canal	O	O	O	O	O
b. Sewer treatment plant	O	O	O	O	O
c. Sewer collections system	O	O	O	O	O
d. Expansion of state numbered roads (not including Rt. 6)	O	O	O	O	O
e. Expansion of Rt. 6 after Exit 9	O	O	O	O	O
f. Expansion of Rt. 6 before Exit 9	O	O	O	O	O
g. Improved commercial harbor facilities	O	O	O	O	O
h. A public parking garage	O	O	O	O	O
i. Bike paths	O	O	O	O	O

11. Would you support or oppose the following projects for your town if citizens proposed that the town should increase taxes in order to spend more money on them than your town is currently spending?

	Strongly Support	Support	Unsure	Oppose	Strongly Oppose
a. Preservation or restoration of historic buildings	O	O	O	O	O
b. Purchase of land to improve public access to the shore (both fresh and saltwater)	O	O	O	O	O
c. Purchase of open space for water supply protection	O	O	O	O	O
d. Purchase of open space for a variety of recreational uses such as walking, bicycling or picnicking	O	O	O	O	O
e. Construction of public recreational facilities such as ball fields, golf courses, tennis courts, etc.	O	O	O	O	O
f. Purchase of land or buildings to provide affordable housing	O	O	O	O	O
g. Purchase of open space so it will remain open and not be developed	O	O	O	O	O
h. Construction of wastewater treatment facilities	O	O	O	O	O

12. The Cape Cod Commission and local regulatory agencies use regulations to direct development. To what extent would you support or oppose the following **for your town** and **for the entire Cape**?

	In Your Town					For the Entire Cape				
	Strongly Support	Support	Unsure	Oppose	Strongly Oppose	Strongly Support	Support	Unsure	Oppose	Strongly Oppose
a. Make development easier in already-developed **commercial** areas but harder in less developed areas	O	O	O	O	O	O	O	O	O	O
b. Make development easier in already-developed **residential** areas but harder in less developed areas	O	O	O	O	O	O	O	O	O	O
c. Make development easier everywhere	O	O	O	O	O	O	O	O	O	O
d. Make development harder everywhere	O	O	O	O	O	O	O	O	O	O

13. How much of a priority should each of the following goals be for the Cape Cod Commission?

	High Priority	Moderate Priority	Low Priority
a. Preservation and restoration of historic buildings	O	O	O
b. Ensure an adequate supply of affordable housing for Cape residents	O	O	O
c. Protect the Cape's drinking water quality	O	O	O
d. Protect the Cape's recreational waters and surface water quality	O	O	O
e. Encourage development to locate in specified already developed areas	O	O	O
f. Protect open space and scenic landscapes	O	O	O
g. Preserve and enhance the fishing and shellfishing industries on the Cape	O	O	O
h. Preserve and enhance agriculture on the Cape	O	O	O
i. Encourage businesses to locate on the Cape	O	O	O
j. Encourage expansion of tourism on the Cape	O	O	O
k. Promote road improvements to ensure traffic safety and ease of travel	O	O	O
l. Improve public transportation such as buses, rail services, etc.	O	O	O
m. Improve bicycle and walking paths	O	O	O
n. Promote commuter rail service to Boston	O	O	O
o. Promote passenger rail service on or within Cape Cod	O	O	O
p. Support development of improved wastewater treatment facilities	O	O	O

14. The Cape Cod Commission Act gives the Commission the authority to establish regulations that apply to development with regional impacts on Cape Cod. Please indicate how strongly you would support or oppose each regulation as described.

	Strongly Support	Support	Unsure	Oppose	Strongly Oppose
a. Assessing fees to developers in order to pay for the impacts of development on infrastructure and the natural environment	O	O	O	O	O
b. Limiting the size of development projects to reduce impacts on traffic congestion and safety	O	O	O	O	O
c. Requiring new buildings to conform to architectural styles that are in keeping with the character of Cape Cod	O	O	O	O	O
d. Requiring developers of new residential projects to provide 10% of units as affordable housing	O	O	O	O	O
e. Requiring developers of new commercial developments to offset low wages with support for affordable housing development on Cape Cod	O	O	O	O	O
f. Requiring developers to set aside land as open space proportional to new land developed	O	O	O	O	O
g. Requiring new residential subdivisions to cluster lots to preserve open space and protect sensitive resources on the site	O	O	O	O	O
h. Requiring new developments to use wastewater treatment systems that protect water quality	O	O	O	O	O
i. Prohibiting the storage or use of hazardous materials or wastes in areas where they could pollute public water supply wells	O	O	O	O	O
j. Restricting new developments in or near wetlands, ponds, floodplains, dunes, and critical habitat areas	O	O	O	O	O
k. Directing new projects to existing developed areas with existing transportation and wastewater infrastructure by making development easier in those locations while making it more difficult in areas with significant natural and historic resources	O	O	O	O	O
l. Requiring flood resistant constructions in coastal areas	O	O	O	O	O

15. Do you believe the following issues should be addressed primarily at the town level, regional level, or both?

	Town Level	Regional Level	Both
a. Land use planning	O	O	O
b. Infrastructure planning	O	O	O
c. Wastewater planning	O	O	O
d. Sea Level Rise planning	O	O	O
e. Natural disaster planning	O	O	O
f. Infrastructure financing	O	O	O
g. Building and management of wastewater infrastructure	O	O	O

16. What types of activities do you enjoy most living near the water? (Choose all that apply.)

- O Water view
- O Swimming
- O Fishing
- O Shellfishing
- O Boating
- O Don't know

17. Have you noticed any change in coastal or pond water quality in the last 10 years?

- O Yes
- O No
- O Don't know

18. Which, if any, recreational activities have you changed or stopped because of the noticed change in coastal or pond water quality? (Choose all that apply.)

- O Water view
- O Swimming
- O Fishing
- O Shellfishing
- O Boating
- O Have not changed or stopped
- O Don't know

19. We would like very much to hear any additional ideas you may have regarding the work of the Cape Cod Commission and/or the Regional Policy Plan. If there is anything you would like to say, please write it in the space below.

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ABOUT YOU

20. In which Cape town do you currently live or maintain a residence?

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

21. How long have you lived or maintained a residence on Cape Cod?

- O Less than 1 year
- O 1 to 5 years
- O 6 to 10 years
- O 11 to 15 years
- O More than 15 years
- O Lifetime resident

22a. Are you a year-round resident of Cape Cod?

- O Yes (if yes, skip to question 23)
- O No

22b. Do you have plans to become a year-round resident in the next 5 years?

- O Yes (if yes, skip to question 23)
- O No

22c. Do you have plans to become a year-round resident in the next 15 years?

- O Yes
- O No

23. About how much time have you spent on the Cape in the past 12 months?

- O Less than 3 weeks
- O 3 weeks to 2 months
- O 3 to 6 months
- O More than 6 months

24. Is that more, less or about the same amount of time as you typically spend on the Cape each year?

- More
- Less
- About the same
- This is my first year on the Cape

25. Which of the following most accurately reflects how you plan to use your home on Cape Cod within the next 1-5 years?

- Only as a primary residence
- Only as a second home for personal/family use
- Only as a rental
- As both a rental and a primary residence
- As both a rental and a second home for personal/family use
- Sell it
- Hand it down to a family member or friend
- Don't know

26. Fifteen years from now do you expect your Cape home to be...

- Only your primary residence
- Only as a second home for personal/family use
- Only a rental
- Both a rental and a primary residence
- Both a rental and a second home for personal/family use
- Sold
- Passed down to a family member or friend
- Don't know

27. Is your property adjacent to the water?

- Yes
- No

28. Do you live in a flood zone?

- Yes
- No
- Don't know

29. Do you pay flood insurance?

- Yes
- No
- Don't know

30. Are you male or female?

- Male
- Female

31. In what year were you born?

32. What was your total household income (before taxes) in 2013?

- $10,000 or less
- $10,001 to $15,000
- $15,001 to $25,000
- $25,001 to $35,000
- $35,001 to $50,000
- $50,001 to $65,000
- $65,001 to $85,000
- $85,001 to $100,000
- $100,001 to $150,000
- More than $150,000

Appendix B

Aggregated Item Frequencies

Cape Cod Homeowner's Survey 2014

Every five years, the Cape Cod Commission initiates an update to its Regional Policy Plan (RPP). This RPP is what defines the regional development goals, standards, and objectives for Barnstable County. The following survey questions are designed to inform this update concerning resident and visitor attitudes and concerns about the built and natural environment on Cape Cod as well as its economic development.

GETTING YOUR PERSPECTIVE

1. When you first decided to live or maintain a residence on Cape Cod, how important to you personally were the following factors in making this decision?

	n	Very Important	Important	Not Very Important	Not At All Important
a. Job or economic opportunities	369	22.8%	19.5%	25.7%	32.0%
b. Good place to raise children	371	24.3%	19.1%	24.0%	32.6%
c. Good schools	364	22.8%	23.9%	23.9%	29.4%
d. Nearness of friends or relatives	369	21.7%	37.4%	25.5%	15.4%
e. Nearness to Boston or Providence	373	11.0%	34.3%	34.0%	20.6%
f. Housing that you can afford	377	32.4%	45.4%	13.0%	9.3%
g. Reasonable taxes	379	40.6%	45.4%	7.4%	6.6%
h. Public services	377	19.6%	51.7%	21.0%	7.7%
i. Environmental quality (clean air and water)	380	56.6%	36.1%	3.9%	3.4%
j. Access to the coast	380	60.0%	29.5%	8.2%	2.4%
k. Outdoor recreational opportunities, I. such as fishing, hiking, boating, etc.	379	45.6%	34.8%	16.1%	3.4%
l. Shopping opportunities	375	10.1%	34.7%	37.3%	17.9%
m. Good place to retire	378	38.4%	34.9%	15.3%	11.4%
n. Historic character of the Cape	380	29.7%	41.3%	21.1%	7.9%

2. In general, do you think the amount of development on Cape Cod is too much, too little, or about the right amount? (n=386)

Too much	44.8%
Too little	9.3%
About the right amount	45.9%

3. How do you feel about the current level of residential development in your town or for the entire Cape?

	n	Too much	Too little	Just right	Not the right kind
In your town	382	32.2%	4.7%	55.8%	7.3%
For the entire Cape	368	42.9%	7.1%	41.3%	8.7%

4. How do you feel about the current level of commercial development in your town or for the entire Cape?

	n	Too much	Too little	Just right	Not the right kind
In your town	382	22.0%	19.1%	52.4%	6.5%
For the entire Cape	367	32.7%	19.1%	36.8%	11.4%

5. Do you feel we need more of any type of housing in your town or for the entire Cape?

	In Your Town		For the Entire Cape	
	n	%	n	%
a. Single family homes	355	19.7%	352	19.6%
b. 2-family homes	346	9.5%	352	15.3%
c. Rental apartments	354	20.9%	354	28.5%
d. Condominiums	349	9.5%	354	17.5%
e. Auxiliary dwellings	348	5.5%	347	8.9%
f. Top-of-the-shop housing	350	9.4%	350	12.3%
g. Deed restricted low-income ownership housing	358	29.1%	358	35.8%
h. Deed restricted low-income rental housing	354	20.9%	355	28.2%

6. Do you feel we need more of any type of commercial structures in your town or for the entire Cape? (Choose all that apply)

	In Your Town		For the Entire Cape	
	n	%	n	%
a. Professional offices	355	10.4%	356	12.4%
b. Medical offices	359	22.6%	352	18.5%
c. Retail - Large	349	12.3%	354	19.8%
d. Retail - Small	359	24.0%	355	15.5%
e. Light manufacturing structures	350	18.6%	362	29.8%
f. Laboratory/R&D Space	350	19.1%	358	26.5%
g. Warehouses	349	5.7%	351	9.4%

7. Consider the issues listed below for your town and for the entire Cape. For each one, please indicate whether you think it is currently a serious problem, a moderate problem, or not a problem for your town and for the entire Cape.

	For Your Town				For the Entire Cape			
	n	Serious problem	Moderate Problem	Not a problem	n	Serious Problem	Moderate Problem	Not a problem
a. Residential sprawl	336	12.8%	32.7%	54.5%	322	22.0%	43.8%	34.2%
b. Commercial sprawl	323	15.8%	29.7%	54.5%	315	25.4%	45.4%	29.2%
c. Traffic congestion	363	44.6%	40.8%	14.6%	341	63.3%	29.9%	6.7%
d. Adequacy of town services	343	6.1%	29.4%	64.4%	290	7.9%	46.6%	45.5%
e. Loss of open space	349	26.9%	34.7%	38.4%	323	34.1%	42.4%	23.5%
f. Quality of education	323	10.5%	31.6%	57.9%	299	13.4%	42.5%	44.1%
g. Availability of moderate and lower-priced housing	348	25.3%	39.4%	35.3%	323	30.7%	42.1%	27.2%
h. Pollution of drinking water supply	351	29.6%	30.5%	39.9%	321	33.0%	42.4%	24.6%
i. Pollution of ponds or coastal waters	350	40.9%	36.3%	22.9%	318	46.9%	36.2%	17.0%
j. Coastal erosion	357	46.8%	38.7%	14.6%	334	58.1%	33.8%	8.1%
k. Air pollution	343	12.8%	35.0%	52.2%	322	15.8%	39.1%	45.0%
l. Taxes	360	24.4%	43.9%	31.7%	319	20.7%	55.2%	24.1%
m. Availability of job or economic opportunities	348	40.2%	42.0%	17.8%	325	44.6%	44.0%	11.4%
n. Loss of historic character	350	17.7%	37.7%	44.6%	329	24.6%	44.1%	31.3%
o.Cost of waste-water treatment	344	27.9%	42.7%	29.4%	314	35.4%	42.7%	22.0%
p. Cost of solid waste disposal	344	31.1%	41.6%	27.3%	313	36.1%	42.5%	21.4%
q. Availability of public transportation	346	22.3%	45.1%	32.7%	322	26.4%	47.5%	26.1%
r. Availability of recreational opportunities	354	5.4%	20.1%	74.6%	322	5.3%	22.7%	72.0%
s. Adequacy of healthcare facilities	356	11.8%	34.3%	53.9%	322	12.4%	41.6%	46.0%
t. Availability of high-speed Internet access	353	13.3%	33.7%	53.0%	307	15.0%	34.9%	50.2%

8. Again, consider the issues listed below for your town and for the entire Cape. For each one, please indicate whether you think it will be a serious problem or will not be a serious problem in the next 5 years.

	For Your Town			For the Entire Cape		
	n	Will be a serious problem	Will not be a serious problem	n	Will be a serious problem	Will not be a serious problem
a. Residential sprawl	346	48.0%	52.0%	321	62.3%	37.7%
b. Commercial sprawl	343	48.1%	51.9%	320	66.9%	33.1%
c. Traffic congestion	353	84.7%	15.3%	336	92.9%	7.1%
d. Adequacy of town services	342	40.6%	59.4%	298	49.7%	50.3%
e. Loss of open space	352	56.5%	43.5%	322	69.3%	30.7%
f. Quality of education	327	39.1%	60.9%	305	49.5%	50.5%
g. Availability of moderate and lower-priced housing	336	62.8%	37.2%	321	68.8%	31.2%
h. Pollution of drinking water supply	345	60.6%	39.4%	319	68.3%	31.7%
i. Pollution of ponds or coastal waters	347	72.3%	27.7%	324	76.9%	23.1%
j. Coastal erosion	357	78.2%	21.8%	331	86.1%	13.9%
k. Air pollution	343	38.8%	61.2%	320	42.8%	57.2%
l. Taxes	351	69.5%	30.5%	323	74.9%	25.1%
m. Availability of job or economic opportunities	337	74.8%	25.2%	319	80.6%	19.4%
n. Loss of historic character	349	45.0%	55.0%	320	55.3%	44.7%
o. Cost of waste-water treatment	338	76.6%	23.4%	317	81.7%	18.3%
p. Cost of solid waste disposal	342	76.3%	23.7%	325	79.4%	20.6%
q. Availability of public transportation	334	53.3%	46.7%	316	59.5%	40.5%
r. Availability of recreational opportunities	341	20.2%	79.8%	318	21.7%	78.3%
s. Adequacy of healthcare facilities	344	41.6%	58.4%	320	47.2%	52.8%
t. Availability of high-speed Internet access	341	34.0%	66.0%	313	35.5%	64.5%

9. Please indicate the extent to which you would support or oppose the following kinds of development if they were proposed for your town and for the entire Cape. Assume that all the proposed developments would meet current zoning and environmental regulations.

	For Your Town					
	n	Strongly Support	Support	Unsure	Oppose	Strongly Oppose
a. A technology firm, such as software development	358	36.0%	45.3%	10.6%	3.4%	4.7%
b. A light industrial use, such as a small manufacturing firm employing 25-50 people	359	24.0%	43.7%	13.4%	11.4%	7.5%
c. A gravel-mining operation	353	3.4%	6.8%	21.0%	26.9%	41.9%
d. A new 50-room motel or hotel	354	5.4%	19.8%	21.5%	26.0%	27.4%
e. A cultural facility (e.g., concert hall, art gallery, or museum that would be open year-round)	358	28.8%	48.3%	13.4%	5.9%	3.6%
f. Commercial recreational use (e.g., miniature golf course, water slide)	358	3.9%	22.3%	22.1%	31.6%	20.1%
g. A marina with docking space for 100 boats	354	13.8%	30.8%	22.0%	20.6%	12.7%
h. A golf course	355	7.3%	21.7%	22.3%	29.3%	19.4%
i. A national fast-food chain restaurant	358	4.5%	19.0%	18.4%	27.9%	30.2%
j. A gambling casino	361	3.9%	5.0%	4.7%	13.6%	72.9%
k. A large shopping mall, such as the Cape Cod Mall	359	5.6%	7.8%	10.6%	21.2%	54.9%
l. A roadside shopping plaza	353	4.2%	15.9%	22.9%	24.9%	32.0%
m. A large discount store	359	9.7%	14.8%	17.0%	20.9%	37.6%
n. A large supermarket	360	10.6%	26.9%	16.9%	20.0%	25.6%
o. A neighborhood business such as a small food store, general store, or hardware store located in and serving a residential neighborhood	359	24.0%	49.0%	13.6%	8.6%	4.7%
p. Affordable housing for low-and moderate-income people in single-family homes	358	19.0%	35.5%	21.2%	12.6%	11.7%
q. Affordable housing for low-and moderate-income people in townhouses or duplexes	359	16.2%	32.0%	20.6%	17.3%	13.9%

	For Your Town					
	n	Strongly Support	Support	Unsure	Oppose	Strongly Oppose
r. A typical residential subdivision on large lots	356	3.7%	20.2%	29.2%	25.8%	21.1%
s. A clustered residential subdivision (smaller lots with large areas of protected open space)	350	8.3%	34.6%	28.3%	16.6%	12.3%
t. A multi-story residential building	355	1.7%	8.7%	20.6%	31.5%	37.5%
u. Mixed use development (e.g., residential units developed together with retail, restaurants, and other commercial space.)	353	6.2%	26.9%	26.1%	18.1%	22.7%
v. Conference facility	352	6.0%	26.7%	29.3%	17.6%	20.5%
w. Indoor/outdoor athletic field complex	357	9.8%	35.0%	22.7%	17.4%	15.1%

	For the Entire Cape					
	n	Strongly Support	Support	Unsure	Oppose	Strongly Oppose
a. A technology firm, such as software development	328	44.5%	42.7%	7.0%	3.0%	2.7%
b. A light industrial use, such as a small manufacturing firm employing 25-50 people	328	34.5%	42.1%	12.8%	6.1%	4.6%
c. A gravel-mining operation	322	4.3%	10.9%	23.9%	26.4%	34.5%
d. A new 50-room motel or hotel	318	10.7%	28.9%	26.7%	17.3%	16.4%
e. A cultural facility (e.g., concert hall, art gallery, or museum that would be open year-round)	322	34.8%	48.8%	10.6%	3.7%	2.2%
f. Commercial recreational use (e.g., miniature golf course, water slide)	323	5.0%	33.4%	28.5%	22.3%	10.8%
g. A marina with docking space for 100 boats	319	14.4%	38.6%	26.0%	13.5%	7.5%
h. A golf course	315	8.6%	29.8%	23.8%	22.5%	15.2%
i. A national fast-food chain restaurant	319	3.8%	25.1%	23.8%	25.1%	22.3%
j. A gambling casino	326	4.9%	6.7%	6.7%	9.8%	71.8%
k. A large shopping mall, such as the Cape Cod Mall	324	6.5%	12.7%	19.4%	18.5%	42.9%
l. A roadside shopping plaza	318	4.1%	22.3%	28.0%	23.3%	22.3%
m. A large discount store	319	11.0%	22.6%	24.8%	13.5%	28.2%
n. A large supermarket	323	12.1%	31.0%	28.5%	11.5%	17.0%
o. A neighborhood business such as a small food store, general store, or hardware store located in and serving a residential neighborhood	325	25.5%	49.2%	15.4%	6.8%	3.1%
p. Affordable housing for low-and moderate-income people in single-family homes	327	22.6%	41.0%	17.4%	9.5%	9.5%
q. Affordable housing for low-and moderate-income people in townhouses or duplexes	328	18.6%	36.3%	19.2%	14.6%	11.3%

	For the Entire Cape					
	n	Strongly Support	Support	Unsure	Oppose	Strongly Oppose
r. A typical residential subdivision on large lots	318	4.4%	25.2%	34.3%	20.8%	15.4%
s. A clustered residential subdivision (smaller lots with large areas of protected open space)	315	10.2%	41.3%	27.0%	14.0%	7.6%
t. A multi-story residential building	320	2.8%	13.8%	26.6%	25.9%	30.9%
u. Mixed use development (e.g., residential units developed together with retail, restaurants, and other commercial space.)	317	8.2%	34.1%	26.8%	15.1%	15.8%
v. Conference facility	319	11.3%	36.1%	31.7%	7.8%	13.2%
w. Indoor/outdoor athletic field complex	329	13.4%	39.5%	26.7%	10.9%	9.4%

10. To what extent do you support or oppose the following infrastructure development?

	n	Strongly Support	Support	Unsure	Oppose	Strongly Oppose
a. A third automobile bridge across the Cape Cod Canal	369	25.5%	26.3%	18.2%	13.8%	16.3%
b. Sewer treatment plant	368	26.9%	44.0%	19.0%	5.7%	4.3%
c. Sewer collections system	360	24.2%	41.1%	28.1%	3.3%	3.3%
d. Expansion of state numbered roads (not including Rt. 6)	354	9.9%	20.6%	34.2%	22.9%	12.4%
e. Expansion of Rt. 6 after exit 9	359	19.2%	35.9%	19.8%	13.4%	11.7%
f. Expansion of Rt. 6 before exit 9	362	11.9%	25.1%	24.6%	26.0%	12.4%
g. Improved commercial harbor facilities	365	13.4%	38.4%	34.8%	8.5%	4.9%
h. A public parking garage	362	7.7%	23.5%	34.5%	23.2%	11.0%
i. Bike paths	368	43.2%	42.7%	7.6%	4.3%	2.2%

11. Would you support or oppose the following projects for your town if citizens proposed that the town should increase taxes in order to spend more money on them than your town is currently spending?

	n	Strongly Support	Support	Unsure	Oppose	Strongly Oppose
a. Preservation or restoration of historic buildings	363	16.8%	39.4%	17.9%	18.2%	7.7%
b. Purchase of land to improve public access to the shore (both fresh and saltwater)	360	19.7%	45.0%	15.3%	13.9%	6.1%
c. Purchase of open space for water supply protection	365	29.3%	48.2%	12.9%	5.2%	4.4%
d. Purchase of open space for a variety of recreational uses such as walking, bicycling or picnicking	363	26.2%	43.0%	12.7%	11.6%	6.6%
e. Construction of public recreational facilities such as ball fields, golf course, tennis courts, etc.	359	9.2%	24.5%	30.4%	25.3%	10.6%
f. Purchase of land or buildings to provide affordable housing	354	10.2%	30.5%	21.8%	20.9%	16.7%
g. Purchase of open space so it will remain open and not be developed	366	36.3%	36.3%	13.1%	8.2%	6.0%
h. Construction of waste-water treatment facilities	366	23.0%	39.1%	23.8%	7.4%	6.8%

12. The Cape Cod Commission and local regulatory agencies use regulations to direct development. To what extent would you support or oppose the following for your town and for the entire Cape?

	For Your Town						For the Entire Cape					
	n	Strongly Support	Support	Unsure	Oppose	Strongly Oppose	n	Strongly Support	Support	Unsure	Oppose	Strongly Oppose
a. Make development easier in already-developed commercial areas but harder in less developed areas	358	16.2%	43.3%	16.5%	15.9%	8.1%	334	18.0%	45.5%	17.1%	12.6%	6.9%
b. Make development easier in already-developed residential areas but harder in less developed areas	356	10.1%	27.0%	25.6%	26.1%	11.2%	332	10.8%	31.9%	23.5%	23.5%	10.2%
c. Make development easier everywhere	357	3.4%	10.9%	20.2%	30.8%	34.7%	336	3.3%	11.9%	20.5%	30.4%	33.9%
d. Make development harder everywhere	353	16.4%	20.4%	29.2%	22.1%	11.9%	330	17.0%	20.3%	29.7%	22.7%	10.3%

13. How much of a priority should each of the following goals be for the Cape Cod Commission?

	n	High Priority	Moderate Priority	Low Priority
a. Preservation and restoration of historic buildings	350	30.3%	44.9%	24.9%
b. Ensure an adequate supply of affordable housing for Cape residents	345	33.6%	40.9%	25.5%
c. Protect the Cape's drinking water quality	352	86.1%	12.8%	1.1%
d. Protect the Cape's recreational waters and surface water quality	357	76.2%	19.9%	3.9%
e. Encourage development to locate in specified already developed areas	343	29.7%	50.1%	20.1%
f. Protect open space and scenic landscapes	355	64.8%	28.2%	7.0%
g. Preserve and enhance the fishing and shell-fishing industries on the Cape	354	69.8%	23.4%	6.8%
h. Preserve and enhance agriculture on the Cape	352	55.1%	32.1%	12.8%
i. Encourage businesses to locate on the Cape	357	37.3%	42.0%	20.7%
j. Encourage expansion of tourism on the Cape	352	28.7%	38.9%	32.4%
k. Promote road improvements to ensure traffic safety and ease of travel	356	57.0%	33.4%	9.6%
l. Improve public transportation such as buses, rail services, etc.	354	47.5%	37.9%	14.7%
m. Improve bicycle and walking paths	354	48.0%	34.5%	17.5%
n. Promote commuter rail service to Boston	355	49.9%	33.2%	16.9%
o. Promote passenger rail service on or within Cape Cod	355	39.4%	36.9%	23.7%
p. Support development of improved waste-water treatment facilities	351	52.7%	39.3%	8.0%

14. The Cape Cod Commission Act gives the Commission the authority to establish regulations that apply to development with regional impacts on Cape Cod. Please indicate how strongly you would support or oppose each regulation as described.

	n	Strongly Support	Support	Unsure	Oppose	Strongly Oppose
a. Assessing fees to developers in order to pay for the impacts of development on infrastructure and the natural environment	343	42.9%	36.2%	11.7%	5.8%	3.5%
b. Limiting the size of development projects to reduce impacts on traffic congestion and safety	349	46.1%	39.3%	8.6%	4.3%	1.7%
c. Requiring new buildings to conform to architecture styles that are in keeping with the character of Cape Cod	352	44.0%	36.9%	8.0%	8.0%	3.1%
d. Requiring developers of new residential projects to provide 10% of units as affordable housing	350	28.6%	29.1%	15.7%	14.0%	12.6%
e. Requiring developers of new commercial developments to offset low wages with support for affordable housing development on Cape Cod	346	23.4%	28.6%	19.7%	15.0%	13.3%
f. Requiring developers to set aside land as open space proportional to the new land developed	350	40.6%	35.4%	14.0%	5.7%	4.3%
g. Requiring new residential subdivisions to cluster lots to preserve open space and protect sensitive resources on site	346	36.7%	39.3%	13.6%	6.9%	3.5%
h. Requiring new developments to use waste-water treatment systems that protect water quality	350	52.9%	34.0%	10.0%	2.0%	1.1%
i. Prohibiting the storage or use of hazardous materials or wastes in areas where they could pollute public water supply wells	350	75.1%	19.1%	3.1%	1.7%	0.9%
j. Restricting new developments in or near wetlands, ponds, floodplains, dunes, and critical habitat areas	351	63.2%	24.8%	6.0%	4.3%	1.7%
k. Directing new projects to existing developed areas with existing transportation and waste-water infrastructure by making development easier in those locations while making it more difficult in areas with significant natural and historic resources	345	40.0%	37.1%	17.7%	3.5%	1.7%
l. Requiring flood resistant constructions in coastal areas	350	43.7%	35.7%	13.7%	5.4%	1.4%

15. Do you believe the following issues should be addressed primarily at the town level, regional level, or both?

	n	Town Level	Regional Level	Both
a. Land use planning	355	42.3%	8.2%	49.6%
b. Infrastructure planning	353	24.4%	18.4%	57.2%
c. Waste-water planning	358	17.0%	18.2%	64.8%
d. Sea Level Rise planning	350	10.3%	20.9%	68.9%
e. Natural disaster planning	357	7.0%	18.2%	74.8%
f. Infrastructure financing	353	16.7%	20.7%	62.6%
g. Building and management of waste-water infrastructure	355	13.0%	18.9%	68.2%

16. What types of activities do you enjoy most living near the water? (Choose all that apply)

	n	%
Water view	379	82.8%
Swimming	378	69.8%
Fishing	361	39.1%
Shellfishing	353	32.0%
Boating	365	50.4%
Don't know	346	3.5%

17. Have you noticed any change in coastal or pond water quality in the last 10 years? (n=368)

Yes	50.8%
No	32.6%
Don't know	16.6%

18. Which, if any, recreational activities have you changed or stopped because of the noticed change in coastal or pond water quality? (Choose all that apply) (n=389)

	n	%
Water view	345	4.1%
Swimming	350	15.1%
Fishing	349	6.9%
Shellfishing	350	8.6%
Boating	346	2.9%
Have not changed or stopped	372	59.9%
Don't know	348	9.2%

19. We would like very much to hear any additional ideas you may have regarding the work of the Cape Cod Commission and/or the Regional Policy Plan. If there is anything you would like to say, please write it in the space below.

ABOUT YOU

20. In which Cape town do you currently live or maintain a residence? (n=389)

Barnstable	15.4%
Bourne	7.2%
Brewster	5.4%
Chatham	5.1%
Dennis	10.0%
Eastham	4.9%
Falmouth	12.9%
Harwich	6.9%
Mashpee	5.1%
Orleans	5.1%
Provincetown	1.3%
Sandwich	6.2%
Truro	1.3%
Wellfleet	4.6%
Yarmouth	8.5%

21. How long have you lived or maintained a residence on Cape Cod? (n=356)

Less than a year	0.0%
1 to 5 years	4.2%
6 to 10 years	10.7%
11 to 15 years	14.6%
More than 15 years	60.7%
Lifetime resident	9.8%

22A. Are you a year-round resident of Cape Cod? (n=355)

Yes	57.7%
No	42.3%

22B. Do you have plans to become a year-round resident in the next 5 years? (n=149) *[Note: this question was intended only for those indicating that they are not year-round residents.]*

Yes	29.5%
No	70.5%

22C. Do you have plans to become a year-round resident in the next 15 years? (n=116) *[Note: this question was intended only for those indicating that they are not planning to become year-round residents in the next five years.]*

Yes	33.6%
No	66.4%

23. About how much time have you spent on the Cape in the past 12 months? (n=343)

Less than 3 weeks	3.5%
3 weeks to 2 months	16.3%
3 to 6 months	21.3%
More than 6 months	58.9%

24. Is that more, less, or about the same amount of time as you typically spend on the Cape each year? (n=332)

More	10.2%
Less	9.3%
About the same	79.8%
This is my first year on the Cape	0.6%

25. Which of the following most accurately reflects how you plan to use your home on Cape Cod within the next 1-5 years? (n=333)

Only as a primary residence	52.3%
Only as second home for personal/family use	29.1%
Only as a rental	1.2%
As both a rental and a primary residence	1.5%
As both a rental and second home for personal/family use	8.4%
Sell it	2.7%
Hand it down to a family member or friend	1.8%
Don't know	3.0%

26. Fifteen years from now do you expect your Cape home to be... (n=338)

Only your primary residence	39.1%
Only as a second home for personal/family use	13.6%
Only a rental	0.6%
Both a rental and a primary residence	1.5%
Both a rental and a second home for personal/family use	3.0%
Sold	13.0%
Passed down to a family member or friend	14.5%
Don't know	14.8%

27. Is your property adjacent to the water? (n=349)

Yes	25.5%
No	74.5%

28. Do you live in a flood zone? (n=348)

Yes	17.2%
No	69.8%
Don't know	12.9%

29. Do you pay flood insurance? (n=363)

Yes	17.4%
No	77.1%
Don't know	5.5%

30. Are you male or female? (n=354)

Male	56.2%
Female	43.8%

31. In what year were you born? (n=348)
[Note: Age was calculated based on year of birth. The variable ‘age’ was then recoded into age groupings below.]

Age 18–39	2.0%
Age 40–49	5.2%
Age 50–59	20.7%
Age 60–69	29.0%
Age 70+	43.1%

32. What was your total household income (before taxes) in 2014? (n=315)

$10,000 or less	0.0%
$10,001 $15,000	1.3%
$15,001 to $25,000	2.5%
$25,001 to $35,000	6.3%
$35,001 to $50,000	7.9%
$50,001 to $65,000	13.0%
$65,001 to $85,000	15.9%
$85,001 to $100,000	11.4%
$100,001 to $150,000	18.1%
More than $150,000	23.5%

Appendix C

Comparison of 2005 and 2014 Survey Instruments

2014 Survey	2005 Survey	Differences
1. When you first decided to live or maintain a residence on Cape Cod, how important to you personally were the following factors in making this decision? 4-level ranking: very important, important, not very important, not at all important a) Job or economic opportunities b) Good place to raise children c) Good schools d) Nearness of friends or relatives e) Nearness to Boston or Providence f) Housing that you can afford g) Reasonable taxes h) Public services i) Environmental quality (clean air and water) j) Access to the coast k) Outdoor recreational opportunities, such as fishing, hiking, boating, etc. l) Shopping opportunities m) Good place to retire n) Historic character of the Cape	7. Same Wording	None
2. In general, do you think the amount of development on Cape Cod is too much, too little, or about the right amount?	8. Same Wording	None
3. How do you feel about the current level of residential development in your town or for the entire Cape? 4-level ranking: too much, too little, just right, not the right kind In your town For the entire Cape	Q not in 2005	Q added
4. How do you feel about the current level of commercial development in your town or for the entire Cape? 4-level ranking: too much, too little, just right, not the right kind In your town For the entire Cape	Q not in 2005	Q added
5. Do you feel we need more of any type of	Q not in 2005	Q added

2014 Survey	2005 Survey	Differences
housing in your town or for the entire Cape? Selected or not selected for 'In your town' and 'For the entire Cape' a) Single family homes b) 2 family homes c) Rental apartments d) Condominiums e) Auxiliary dwellings f) Top-of-the-shop housing g) Deed restricted low-income ownership housing h) Deed restricted low-income rental housing		
6. Do you feel we need more of any type of commercial structures in your town or for the entire Cape? (Choose all that apply) Selected or not selected for 'In your town' and 'For the entire Cape' a) Professional offices b) Medical offices c) Retail - Large d) Retail - Small e) Light manufacturing structures f) Laboratory/R&D Space g) Warehouses	Q not in 2005	Q added
7. Consider the issues listed below for your town and for the entire Cape. For each one, please indicate whether you think it is currently a serious problem, a moderate problem, or not a problem for your town and for the entire Cape. 3-level ranking for 'For your town' and 'For the entire Cape': serious problem, moderate problem, not a problem a) Residential sprawl b) Commercial sprawl c) Traffic congestion d) Adequacy of town services e) Loss of open space f) Quality of education g) Availability of moderate and lower-priced housing h) Pollution of drinking water supply	9. Same wording	None

2014 Survey	2005 Survey	Differences
i) Pollution of ponds or coastal waters j) Coastal erosion k) Air pollution l) Taxes m) Availability of job or economic opportunities n) Loss of historic character o) Cost of waste-water treatment p) Cost of solid waste disposal q) Availability of public transportation r) Availability of recreational opportunities s) Adequacy of healthcare facilities t) Availability of high-speed Internet access		
8. Again, consider the issues listed below for your town and for the entire Cape. For each one, please indicate whether you think it will be a serious problem or will not be a serious problem in the next 5 years. 3-level ranking for 'For your town' and 'For the entire Cape': serious problem, moderate problem, not a problem a) Residential sprawl b) Commercial sprawl c) Traffic congestion d) Adequacy of town services e) Loss of open space f) Quality of education g) Availability of moderate and lower-priced housing h) Pollution of drinking water supply i) Pollution of ponds or coastal waters j) Coastal erosion k) Air pollution l) Taxes m) Availability of job or economic opportunities n) Loss of historic character o) Cost of waste-water treatment p) Cost of solid waste disposal q) Availability of public transportation r) Availability of recreational opportunities s) Adequacy of healthcare facilities t) Availability of high-speed Internet access	12. Same wording	None
9. Please indicate the extent to which you would support or oppose the following kinds of development if they were proposed for your	13. Same question and scale, but **no 'For the entire Cape'**	Increased scope, added options

2014 Survey	2005 Survey	Differences
town and for the entire Cape. Assume that all the proposed developments would meet current zoning and environmental regulations. 5-level ranking for 'For your town' and 'For the entire Cape': strongly support, support, unsure, oppose, strongly oppose a) A technology firm, such as software development b) A light industrial use, such as a small manufacturing firm employing 25-50 people c) A gravel-mining operation d) A new 50-room motel or hotel e) A cultural facility (e.g., concert hall, art gallery, or museum that would be open year-round) f) Commercial recreational use (e.g., miniature golf course, water slide) g) A marina with docking space for 100 boats h) A golf course i) A national fast-food chain restaurant j) A gambling casino k) A large shopping mall, such as the Cape Cod Mall l) A roadside shopping plaza m) A large discount store n) A large supermarket o) A neighborhood business such as a small food store, general store, or hardware store located in and serving a residential neighborhood p) Affordable housing for low-and moderate-income people in single-family homes q) Affordable housing for low-and moderate-income people in townhouses or duplexes r) A typical residential subdivision on large lots s) A clustered residential subdivision (smaller lots with large areas of protected open space) t) A multi-story residential building u) Mixed use development (e.g., residential units developed together with retail, restaurants, and other commercial space.) v) Conference facility w) Indoor/outdoor athletic field complex	**Items not included in 2005:** u) Mixed use development (e.g., residential units developed together with retail, restaurants, and other commercial space.) v) Conference facility w) Indoor/outdoor athletic field complex	
10. To what extent do you support or oppose the following infrastructure development?	Q not in 2005	Q added

2014 Survey	2005 Survey	Differences
5-level ranking: strongly support, support, unsure, oppose, strongly oppose a) A third automobile bridge across the Cape Cod Canal b) Sewer treatment plant c) Sewer collections system d) Expansion of state numbered roads (not including Rt. 6) e) Expansion of Rt. 6 after exit 9 f) Expansion of Rt. 6 before exit 9 g) Improved commercial harbor facilities h) A public parking garage i) Bike paths		
11. Would you support or oppose the following projects for your town if citizens proposed that the town should increase taxes in order to spend more money on them than your town is currently spending? 5-level ranking: strongly support, support, unsure, oppose, strongly oppose a) Preservation or restoration of historic buildings b) Purchase of land to improve public access to the shore (both fresh and saltwater) c) Purchase of open space for water supply protection d) Purchase of open space for a variety of recreational uses such as walking, bicycling or picnicking e) Construction of public recreational facilities such as ball fields, golf course, tennis courts, etc. f) Purchase of land or buildings to provide affordable housing g) Purchase of open space so it will remain open and not be developed h) Construction of waste-water treatment facilities	14. Same wording	None
12. The Cape Cod Commission and local regulatory agencies use regulations to direct development. To what extent would you support or oppose the following for your town and for the entire Cape?	15. Conveyed as a three-choice question: “Growth Centers" are areas where substantial development and infrastructure already exist. The Cape Cod Commission and local regulatory agencies use regulations to direct	Q, choices altered

2014 Survey	2005 Survey	Differences
5-level ranking for 'For your town' and 'For the entire Cape': strongly support, support, unsure, oppose, strongly oppose a) Make development easier in already-developed commercial areas but harder in less developed areas b) Make development easier in already-developed residential areas but harder in less developed areas c) Make development easier everywhere d) Make development harder everywhere	development. Which sort of regulation would you support? a) Make development easier in already-developed growth centers but harder in less developed areas outside growth centers b) Make development easier both inside and outside growth centers c) Make development harder both inside and outside growth centers	
13. How much of a priority should each of the following goals be for the Cape Cod Commission? 3-level ranking: high priority, moderate priority, low priority a) Preservation and restoration of historic buildings b) Ensure an adequate supply of affordable housing for Cape residents c) Protect the Cape's drinking water quality d) Protect the Cape's recreational waters and surface water quality e) Encourage development to locate in specified already developed areas f) Protect open space and scenic landscapes g) Preserve and enhance the fishing and shell-fishing industries on the Cape h) Preserve and enhance agriculture on the Cape i) Encourage businesses to locate on the Cape j) Encourage expansion of tourism on the Cape k) Promote road improvements to ensure traffic safety and ease of travel l) Improve public transportation such as buses, rail services, etc. m) Improve bicycle and walking paths n) Promote commuter rail service to Boston o) Promote passenger rail service on or within Cape Cod p) Support development of improved waste-water treatment facilities	16. Same question and scale **Item altered:** e) Encourage development to locate in specified **growth centers** **Items not included in 2014:** k) Promote tourism that depends on the preservation of historic areas (also called "heritage tourism") l) Promote tourism that depends on the preservation of natural resources (also called "eco-tourism")	Options altered or excluded
14. The Cape Cod Commission Act gives the Commission the authority to establish	17. Same question and scale	Options altered,

2014 Survey	2005 Survey	Differences
regulations that apply to development with regional impacts on Cape Cod. Please indicate how strongly you would support or oppose each regulation as described. 5-level ranking: strongly support, support, unsure, oppose, strongly oppose a) Assessing fees to developers in order to pay for the impacts of development on infrastructure and the natural environment b) Limiting the size of development projects to reduce impacts on traffic congestion and safety c) Requiring new buildings to conform to architecture styles that are in keeping with the character of Cape Cod d) Requiring developers of new residential projects to provide 10% of units as affordable housing e) Requiring developers of new commercial developments to offset low wages with support for affordable housing development on Cape Cod f) Requiring developers to set aside land as open space proportional to the new land developed g) Requiring new residential subdivisions to cluster lots to preserve open space and protect sensitive resources on site h) Requiring new developments to use waste-water treatment systems that protect water quality i) Prohibiting the storage or use of hazardous materials or wastes in areas where they could pollute public water supply wells j) Restricting new developments in or near wetlands, ponds, floodplains, dunes, and critical habitat areas k) Directing new projects to existing developed areas with existing transportation and waste-water infrastructure by making development easier in those locations while making it more difficult in areas with significant natural and historic resources l) Requiring flood resistant constructions in coastal areas	**Items altered:** e) Requiring developers of new commercial developments to provide affordable housing for employees. f) Requiring developers of large projects to donate land to the local community for use as public open space. l) Directing new projects to locate in growth centers by making development easier **Items not included in 2005:** a) Assessing fees to developers in order to pay for the impacts of development on infrastructure and the natural environment l) Requiring flood resistant constructions in coastal areas **Items not included in 2014:** a) Charging special fees on all new development to fund improvements to the Cape's transportation system, such as public transit and improvement of roads and intersections affected by new development i) Requiring existing residencies to upgrade their septic systems to protect water quality	added, or excluded
15. Do you believe the following issues should be	Q not in 2005	Q added

2014 Survey	2005 Survey	Differences
addressed primarily at the town level, regional level, or both? a) Land use planning b) Infrastructure planning c) Waste-water planning d) Sea Level Rise planning e) Natural disaster planning f) Infrastructure financing g) Building and management of waste-water infrastructure		
16. What types of activities do you enjoy most living near the water? (Choose all that apply) a) Water view b) Swimming c) Fishing d) Shellfishing e) Boating f) Don't know	Q not in 2005	Q added
17. Have you noticed any change in coastal or pond water quality in the last 10 years? Yes No Don't know	Q not in 2005	Q added
18. Which, if any, recreational activities have you changed or stopped because of the noticed change in coastal or pond water quality? (Choose all that apply) a) Water view b) Swimming c) Fishing d) Shellfishing e) Boating f) Don't know	Q not in 2005	Q added
19. We would like very much to hear any additional ideas you may have regarding the work of the Cape Cod Commission and/or the Regional Policy Plan. If there is anything you would like to say, please write it in the space below.	51. Same wording	None
20. In which Cape town do you currently live or maintain a residence?	1. Same wording	None

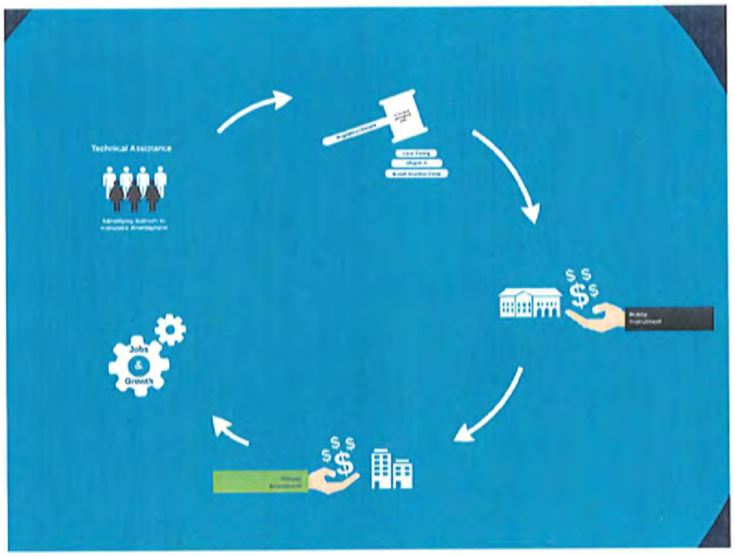
2014 Survey	2005 Survey	Differences
a) Barnstable b) Bourne c) Brewster d) Chatham e) Dennis f) Eastham g) Falmouth h) Harwich i) Mashpee j) Orleans k) Provincetown l) Sandwich m) Truro n) Wellfleet o) Yarmouth		
21. How long have you lived or maintained a residence on Cape Cod? a) Less than a year b) 1 to 5 years c) 6 to 10 years d) 11 to 15 years e) More than 15 years f) Lifetime resident	2. Same wording	None
22A. Are you a year-round resident of Cape Cod? a) Yes b) No If No, go to Q22B and Q22C	3. Same wording	None
22B. Do you have plans to become a year-round resident in the next 5 years? a) Yes b) No	Q not in 2005	Q added
22C. Do you have plans to become a year-round resident in the next 5 years? a) Yes b) No	Q not in 2005	Q added
23. About how much time have you spent on the Cape in the past 12 months?	4. Same wording	None

2014 Survey	2005 Survey	Differences
a) Less than 3 weeks b) 3 weeks to 2 months c) 3 to 6 months d) More than 6 months		
24. Is that more, less, or about the same amount of time as you typically spend on the Cape each year? a) More b) Less c) About the same d) This is my first year on the Cape	5. Same wording	None
25 Which of the following most accurately reflects how you plan to use your home on Cape Cod within the next 1-5 years? a) Only as a primary residence b) Only as second home for personal/family use c) Only as a rental d) As both a rental and a primary residence e) As both a rental and second home for personal/family use f) Sell it g) Hand it down to a family member or friend h) Don't know	Q not in 2005	Q added
26. Fifteen years from now do you expect your Cape home to be... a) Only your primary residence b) Only as a second home for personal/family use c) Only a rental d) Both a rental and a primary residence e) Both a rental and a second home for personal/family use f) Sold g) Passed down to a family member or friend h) Don't know	Q not in 2005	Q added
27. Is your property adjacent to the water? a) Yes b) No	Q not in 2005	Q added
28. Do you live in a flood zone? a) Yes	Q not in 2005	Q added

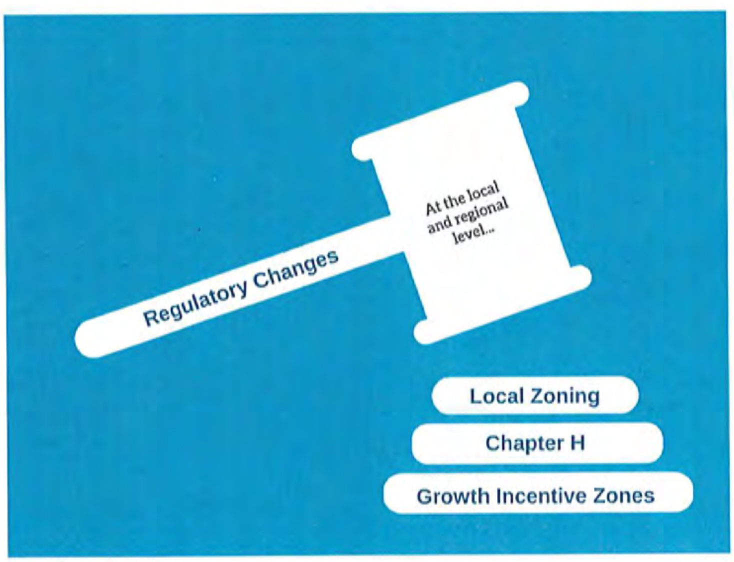
2014 Survey	2005 Survey	Differences
b) No c) Don't know		
29. Do you pay flood insurance? a) Yes b) No c) Don't know	Q not in 2005	Q added
30. Are you male or female? a) Male b) Female	18. Same wording	None
31. In what year were you born?	19. Same wording	None
32. What was your total household income (before taxes) in 2014? a) $10,000 or less b) $10,001 $15,000 c) $15,001 to $25,000 d) $25,001 to $35,000 e) $35,001 to $50,000 f) $50,001 to $65,000 g) $65,001 to $85,000 h) $85,001 to $100,00 i) $100,001 to $150,000 j) More than $150,000	50. What was your total household income (before taxes) in **2004**? a) $10,000 or less **b) $11,000 to $15,000** **c) $16,000 to $25,000** **d) $26,000 to $35,000** **e) $36,000 to $50,000** **f) $51,000 to $65,000** **g) $66,000 to $85,000** **h) $86,000 to $100,000** **i) $101,000 to $150,000** j) More than $150,000	Options altered
	Q numbers not in 2014: 10, 11, 20-49	

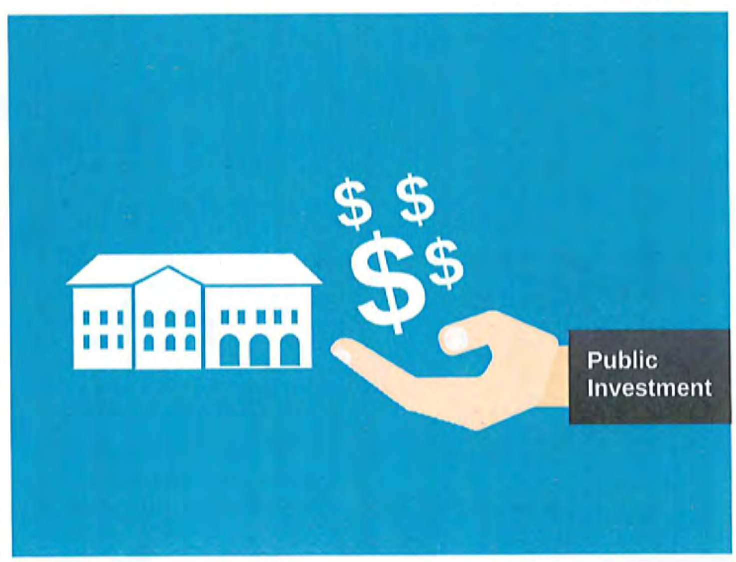
Appendix 5: RESET Presentation to strategy committee

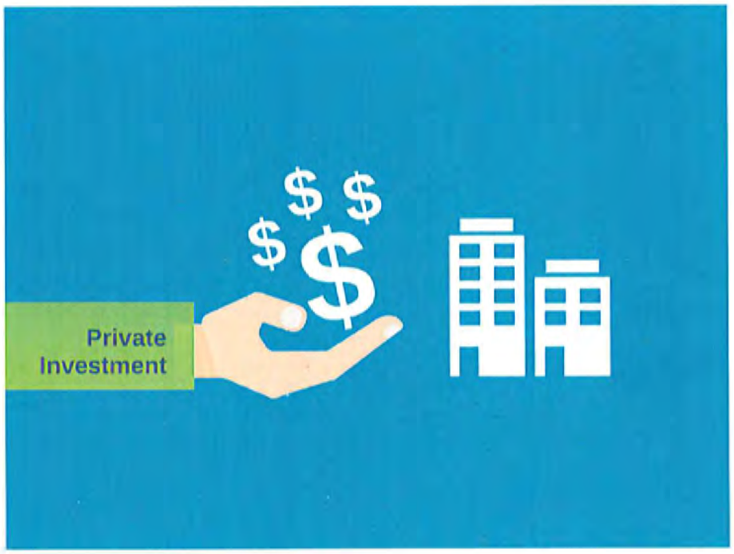
Investing in
Economic Development
on Cape Cod


Technical Assistance
Jobs
&
Growth

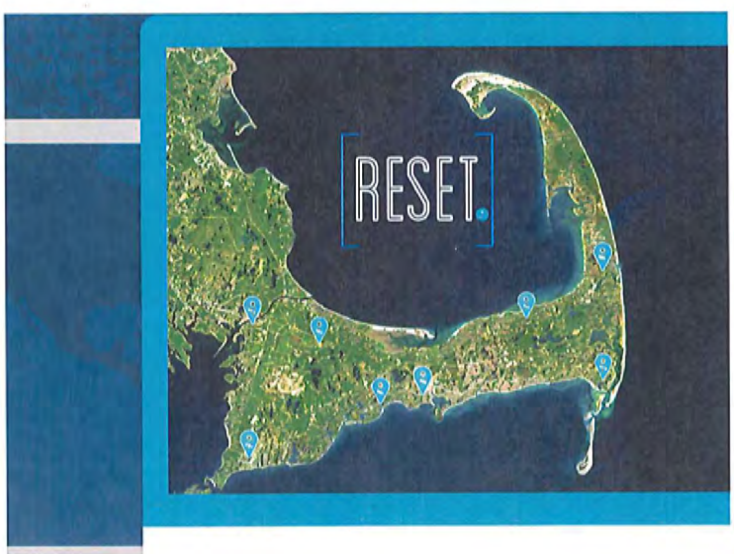

Technical Assistance
Identifying barriers to
economic development

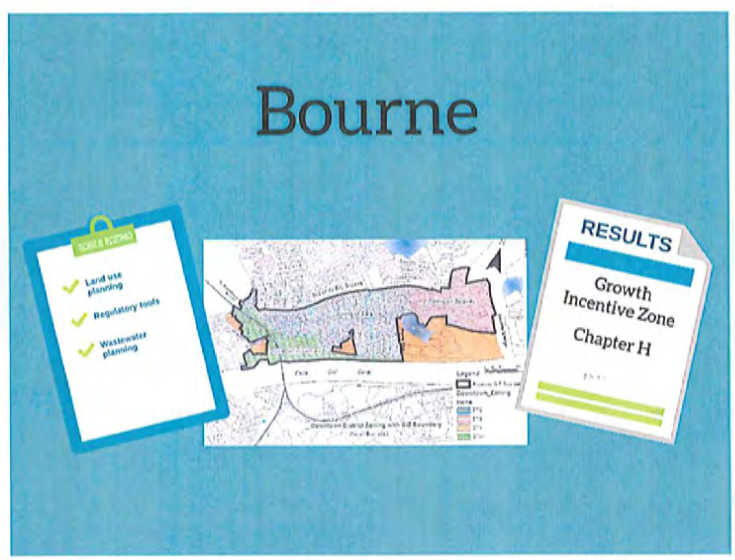

Regulatory Changes
At the local
and regional
level...
Local Zoning
Chapter H
Growth Incentive Zones


Public
Investment

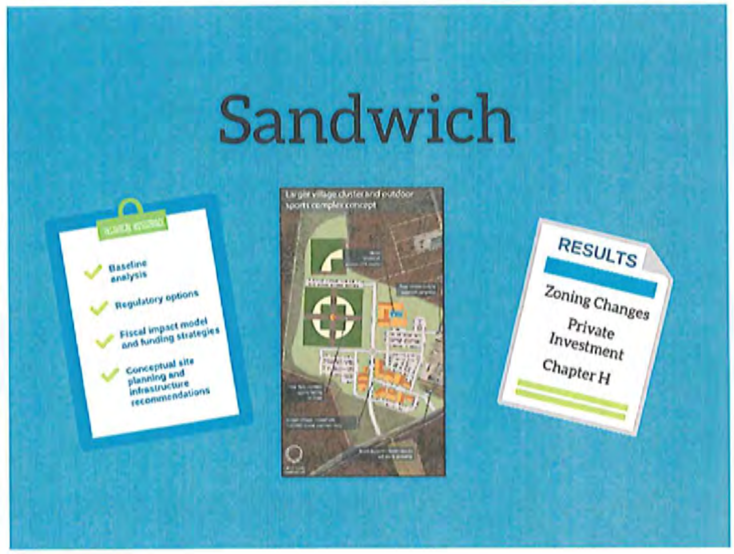

$$$
$
Private
Investment

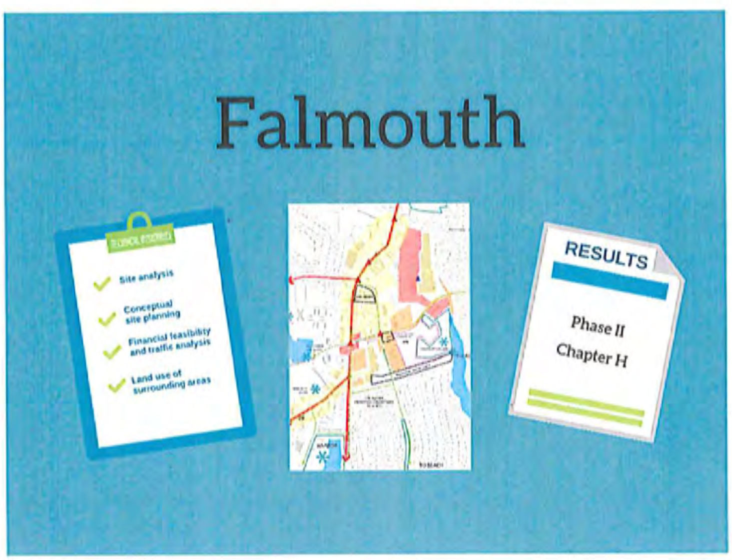

Jobs
&
Growth


RESET.

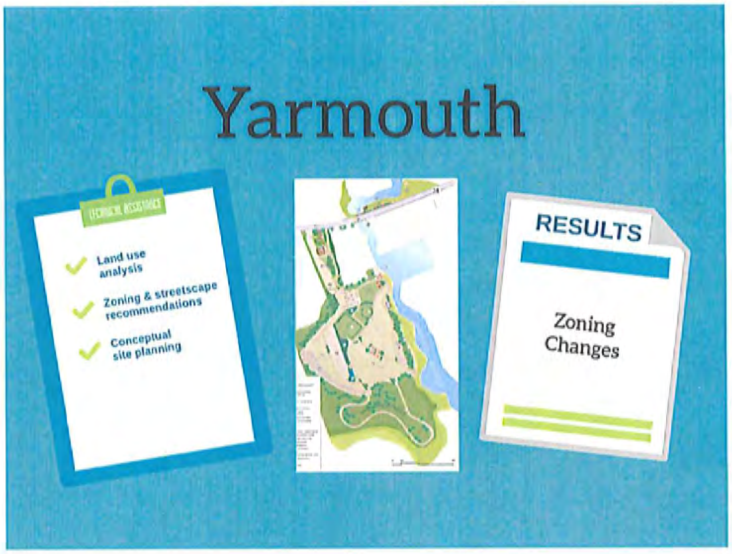

Bourne
Land use planning
Regulatory tools
Wastewater planning
RESULTS
Growth Incentive Zone
Chapter H

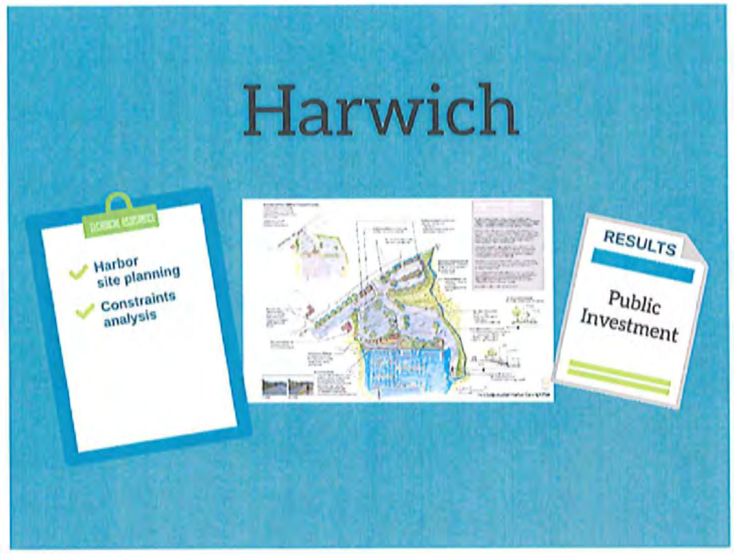

41
new jobs created in 2014
33%
growth in last 3 years
3
Henry Drive
HYDROID
A KONGSBERG COMPANY

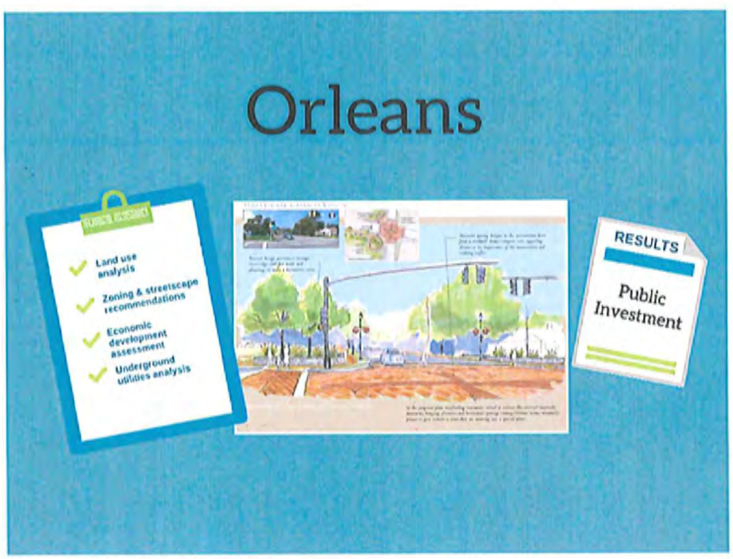

Sandwich
Baseline analysis
Regulatory options
Fiscal impact model and funding strategies
Conceptual site planning and infrastructure recommendations
Large village cluster and outdoor sports complex concept
RESULTS
Zoning Changes
Private Investment
Chapter H

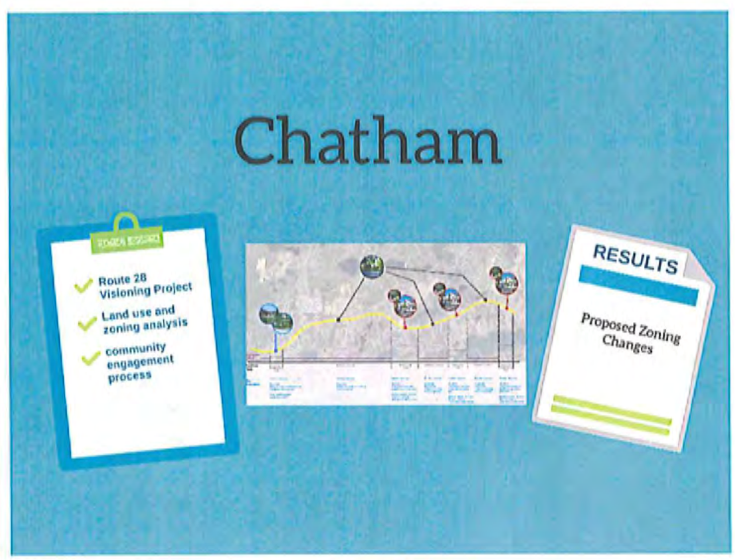

Falmouth
Site analysis
Conceptual site planning
Financial feasibility and traffic analysis
Land use of surrounding areas
RESULTS
Phase II
Chapter H


Barnstable
Land use analysis
Regulatory framework
Conceptual site planning
Funding options
RESULTS
Drafting Zoning Changes
Chapter H

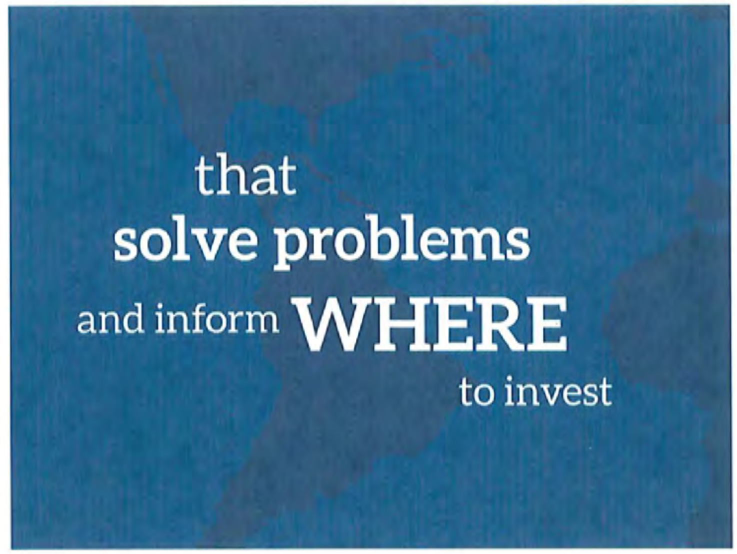

Yarmouth
Land use analysis
Zoning & streetscape recommendations
Conceptual site planning
RESULTS
Zoning Changes

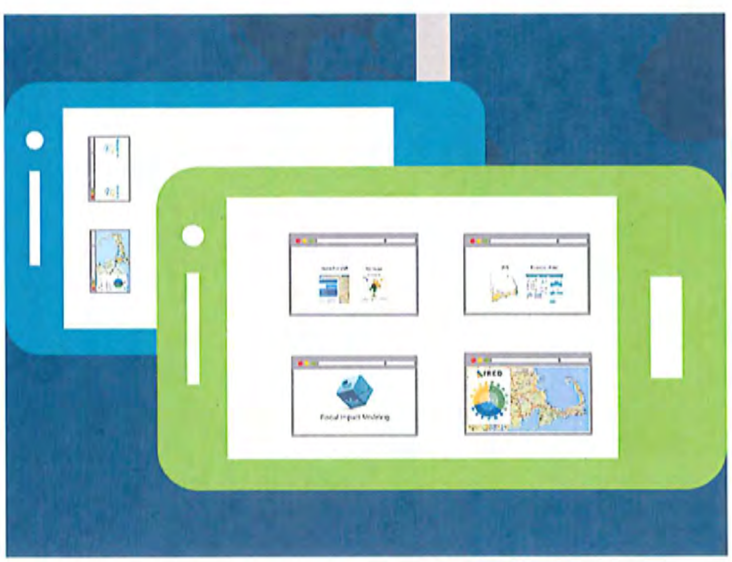

Harwich
Harbor site planning
Constraints analysis
RESULTS
Public Investment

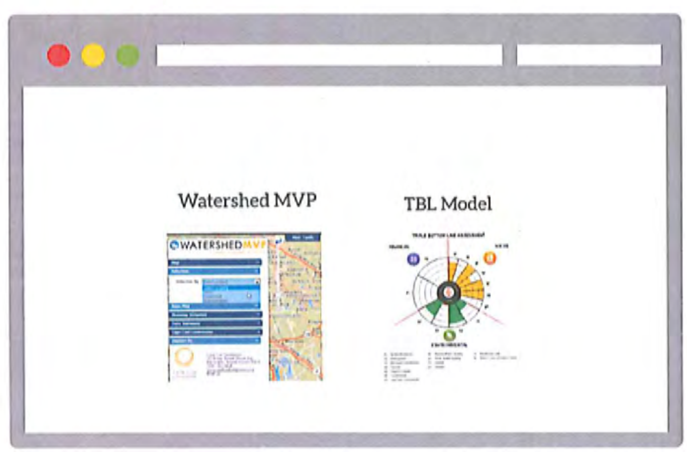

Orleans
Land use analysis
Zoning & streetscape recommendations
Economic development assessment
Underground utilities analysis
RESULTS
Public Investment

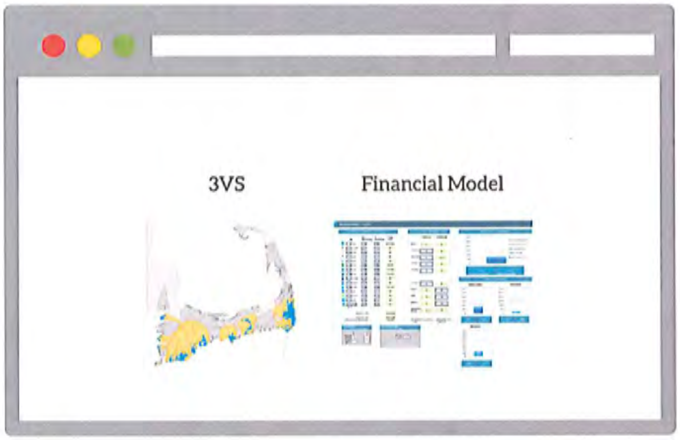

Chatham
Route 28 Visioning Project
Land use and zoning analysis
community engagement process
RESULTS
Proposed Zoning Changes

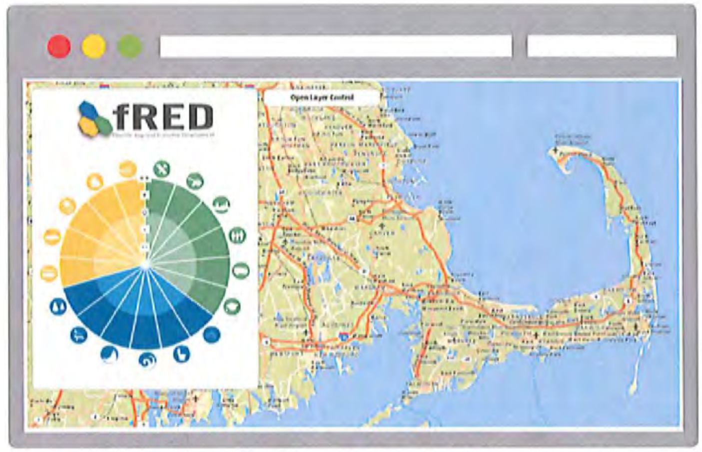

Lessons learned
from RESET projects
have lead to decision support
tools

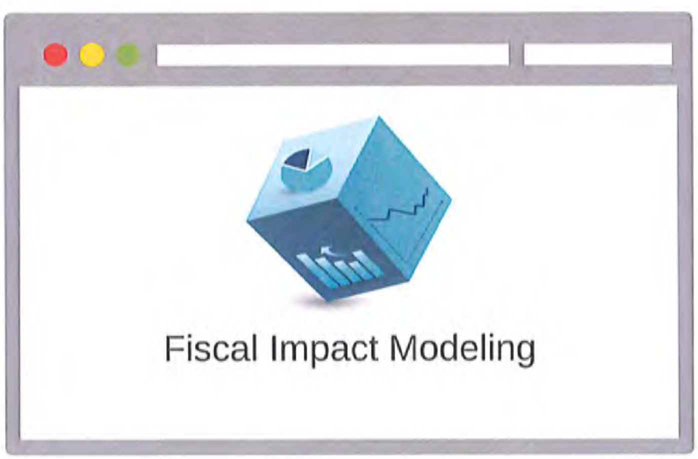

that
solve problems
and inform WHERE
to invest

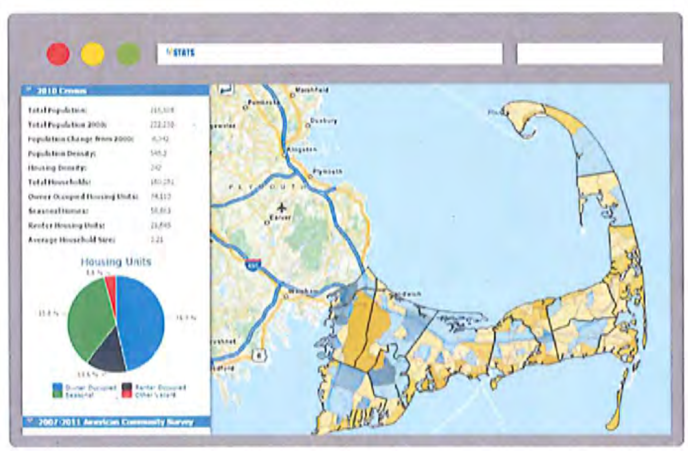



Watershed MVP
TBL Model
WATERSHEDMVP


3VS
Financial Model


fRED
Open Layer Control


Fiscal Impact Modeling


2010 Census
Housing Units
2007-2011 American Community Survey

Investing in

Economic Development

on Cape Cod

CAPE COD COMMISSION

Appendix 6: Smarter Economy Conference agenda and speakers

2015 Smarter Cape Conference

Schedule

7:30- 8:15 AM	Registration, Continental Breakfast & Exhibits	Lobby
8:15 – 8:30 AM	**Is it Smart to be Dense?** **Dorothy Savarese, Cape Cod Five Cents Savings Bank:** Opening Remarks by the Platinum Sponsor ***Interactive Audience Survey 1***	Grand Ballroom
8:30 – 9:15 AM	**The Art of the Possible** **Barry Bluestone, Northeastern University:** How smart communities think, work & live, leaders must think smart to work smart	Grand Ballroom
9:15 – 10:00 AM	**Smarter Living Places** **Debra Bassert, AVP-Land Use & Design-Nat'l Assn of Home Builders:** New consumer preferences from tiny houses to live/work space, how zoning affects our choices & our options	Grand Ballroom
10:00 – 10:50 AM	**Smarter Work** **Deborah Watts, eNC (North Carolina Broadband Authority):** How rural areas make the last mile connection to broadband and the economic impact	Grand Ballroom
	Break	
11:00 – 11:45 AM	**Being Dense** **Clark Ziegler, Executive Director-Mass Housing Partnership:** How current regulative structure doesn't work	Grand Ballroom
11:45 – 12:15 PM	**Thinking Outside the Box** **Chryse Gibson, EVP-Oaktree Development/Greenstaxx:** Flexibility applied to traditional housing	Grand Ballroom
12:15 PM	**Lunch – Real Stories from Cape Codders** Obtain lunch in lobby and return to Grand Ballroom for 15 min. video followed by release of highlights of CCYP housing survey.	Lobby

12:45 – 2:00 PM	**Smarter Solutions** Local Leader Reactions/Solutions to Video & Survey **Moderated by Liz Kovach,** Manager Estimating Dept-Shepley Wood **Rick Fenuccio,** President-Brown, Lindquist, Fenuccio & Raber, Architects **Paul Niedzwiecki,** Executive Director-Cape Cod Commission **Aaron Polhemus,** President & COO-Polhemus Savery DaSilva Architects Builders **Frederick Presbrey,** President & CEO-Housing Assistance Corporation **Michael Scott,** Partner & Land Use Attorney-Nutter Law Firm **Audience Q&A** **Interactive Audience Survey**	Grand Ballroom
2:30 – 3:15 PM	**Let's Be Great at Housing** **His Excellency Charlie Baker, Governor of MA**	
3:30 PM	**Special Exhibit – Kohler Co. & Caltech Reinvent the Toilet Challenge** For more than two years, Kohler Co., global leader in kitchen and bath design and technology, has collaborated with Caltech in the development of a photovoltaic toilet as part of the Reinvent the Toilet Challenge, hosted by the Bill & Melinda Gates Foundation. Meet reps from both Kohler & Caltech as they explain the off-the-grid system. **Feedback & Next Steps**	

2015 Smarter Cape Conference

Speakers

[Governor Charlie Baker]

Charlie Baker was inaugurated on January 8th, 2015 as the 72nd Governor of the Commonwealth of Massachusetts. Elected in November of 2014 on a platform of making Massachusetts great for everyone, Governor Baker's arrival in the Corner Office continues a long, successful … [Read more...]

[Debra Bassert]

Debra Bassert is the Assistant Vice President for Land Use and Design at the National Association of Home Builders and has more than 25 years of experience in land use planning and policy. She manages the Land Use and Design Department, which provides critical analysis of … [Read more...]

[Barry Bluestone]

Barry Bluestone is the Stearns Trustee Professor of Political Economy, the founding director of the Dukakis Center for Urban and Regional Policy (CURP), and the Founding Dean of the School of Public Policy and Urban Affairs at Northeastern University. The Center is a "think … [Read more...]

2015 Smarter Cape Conference

Richard P. Fenuccio

Richard P. Fenuccio is a Registered Architect and President of Brown Lindquist Fenuccio & Raber Architects, Inc. of Yarmouthport, MA. Mr. Fenuccio received a Bachelor of Architecture degree in 1986 from Syracuse University, Syracuse, NY and founded his own general … [Read more...]

Chryse Gibson

Chryse Gibson, Executive Vice President, joined Oaktree Development in 2010 bringing with her a unique blend of skills and expertise to support organizational development, finance, stakeholder relations and business development. Chryse began her building career working … [Read more...]

Liz Kovach

Liz Kovach, and her husband Steve, owned and operated Windswept Homes, a custom home building firm on Cape Cod, for 23 years. They were recognized as Home Builders & Remodelers Association of Cape Cod (HBRACC) Builder of the Year in 1999 & 2007. Liz has also been … [Read more...]

2015 Smarter Cape Conference

Paul Niedzwiecki

Paul Niedzwiecki has been Executive Director of the Cape Cod Commission since 2007. He leads the agency in fulfilling its mission- 'Keeping a Special Place Special'- by protecting the natural environment, enabling economic growth, increasing transparency and encouraging … [Read more...]

Aaron D. Polhemus

As President and Chief Operating Officer of Polhemus Savery DaSilva, Aaron Polhemus oversees the business operations of our entire company. Throughout the phases of a project's work, from concept to completion, Aaron works closely with our design and construction team. He … [Read more...]

Frederic B. Presbrey

Rick founded HAC in 1974 and has been the Executive Director and more recently the President and CEO ever since. He has been involved in affordable housing for his entire career. Well-known as a housing leader and expert throughout the Cape and Islands, Rick is often asked … [Read more...]

2015 Smarter Cape Conference

[Dorothy Savarese]

Dorothy A. Savarese is the Chairman, President and Chief Executive Officer of The Cape Cod Five Cents Savings Bank, an independent Massachusetts state-chartered savings bank founded in 1855. The Cape Cod Five has grown to over $2 billion in assets with a leadership position … [Read more...]

[Michael E. Scott]

Michael E. Scott is a partner of Nutter, McClennen & Fish in the Real Estate and Finance Department and a member of the Land Use practice group. He works out of the firm's Boston and Hyannis offices. Michael represents developers, corporate, institutional and municipal … [Read more...]

[Deborah Watts]

Deborah Watts served for the past 14 years as senior director of research and development for the e-NC Authority/NC Broadband Watts. In this role she was responsible for designing, funding and evaluating national best practice models for increasing broadband Internet access … [Read more...]

2015 Smarter Cape Conference

Clark Ziegler

Clark Ziegler, Executive Director of the Massachusetts Housing Partnership shortly after it was established in 1985 and became Executive Director when MHP was incorporated as a quasi-public state agency in 1990. Under his leadership, MHP has secured $1.2 billion in long-term … [Read more...]

Appendix 7: CEDS Approval Presentation

Cape Cod 2014 Comprehensive Economic Development Strategy

Annual Report – Year 1

Purpose of the CEDS

- Consensus on Vision & Goals for Economic Development on Cape Cod
- Maintain status of Economic Development District (EDD) designation by US Economic Development Administration (EDA)
- Eligibility for US EDA funding for economic development planning and priority projects

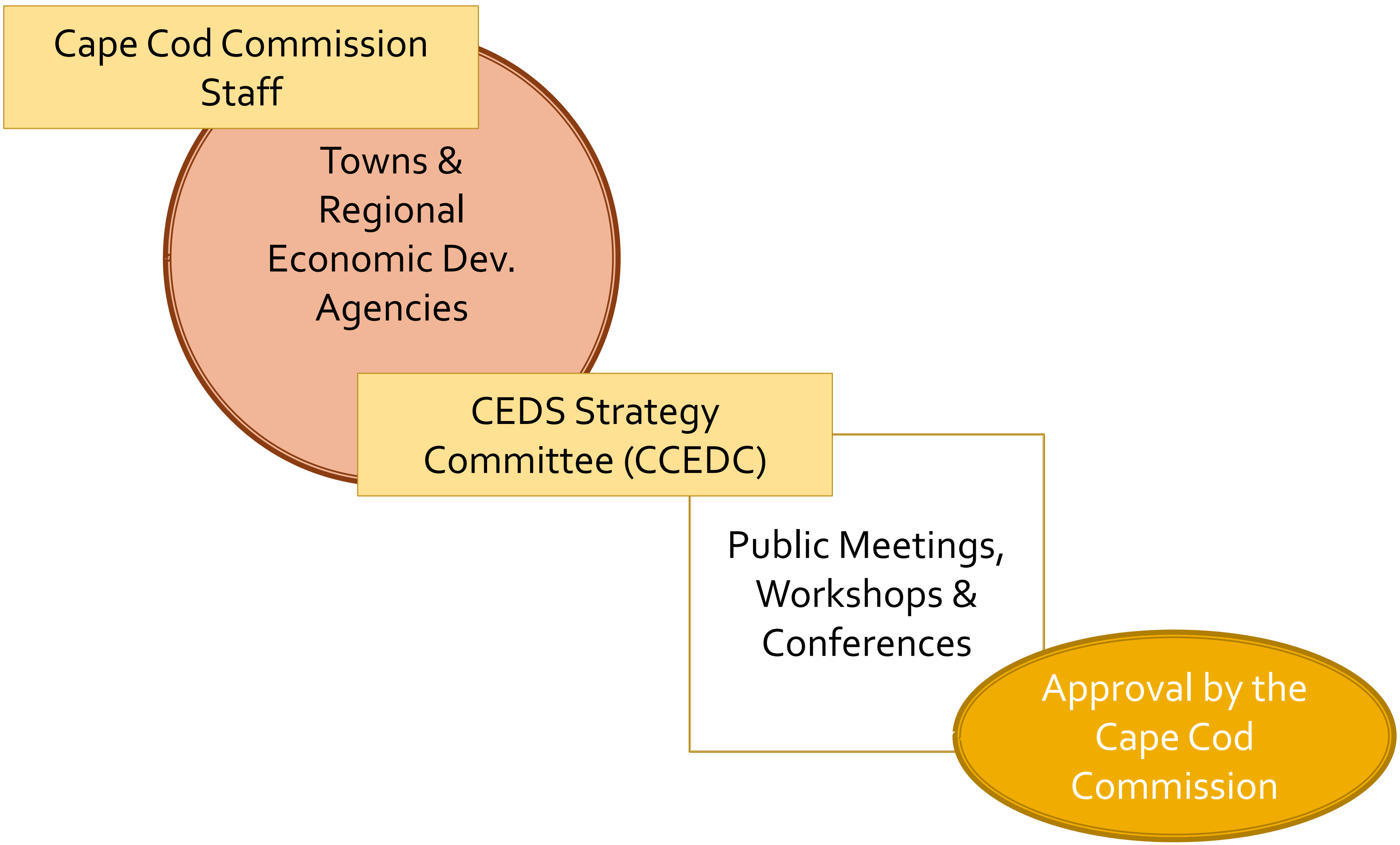
CEDS Annual Report

- CEDS Planning Structure
- CEDS Vision & Goals
- CEDS Evaluation
  - Region
  - CEDS Planning
  - Implementation Plan
  - Regional Priority Projects

The CEDS Planning Process

Capturing the Regional Perspective

CEDS Process



The CEDS Vision & Goals

Based on the Regional Policy Plan

The CEDS Vision

Cape Cod is a mosaic of historic villages, dynamic economic centers, and healthy natural areas where a diverse array of viable employment and business opportunities exist that retain and attract income to the region and are supported by reliable infrastructure designed to serve a modern economy and protect the natural assets and historic character of the region.

CEDS Goal 1: Low Impact & Compatible Development

To promote the design and location of development and redevelopment to preserve the Cape's environment and cultural heritage, use infrastructure efficiently, minimize adverse impacts, and enhance the quality of life for Cape Codders.

CEDS Goal 2: A Balanced Economy

To promote a balanced regional economy with a broad business, industry, employment, cultural and demographic mix capable of supporting year-round and quality employment opportunities.

CEDS Goal 3: Regional Income Growth

To promote economic activity that retains and attracts income to the region and benefits residents, thus increasing economic opportunity for all.

Head Start

CEDS Goal 4: Infrastructure Capacity

To provide adequate capital facilities and infrastructure that meet community and regional needs, expand community access to services, and improve the reliability and quality of services.




CEDS Goal 5: Regional Collaboration & Joint Commitment

To provide a forum for local and regional organizations to be actively involved in determining and executing economic development policies and projects.

capecod CHAMBER OF COMMERCE CONVENTION & VISITORS BUREAU

CCTC

CAPE COD COMMISSION

COUNTY OF BARNSTABLE MASSACHUSETTS

CCYP Connect Engage Advance

Priority Issue Areas

- Housing Affordability
- Wastewater Infrastructure
- Transportation Infrastructure
- Telecommunications Infrastructure
- Energy Infrastructure
- Entrepreneurship/Research & Development
- Demographic Diversity

The CEDS Evaluation

What have we accomplished this year and what are our plans for next year

Evaluating the Region

- Distressed Census Tracts
  - EDA Definition

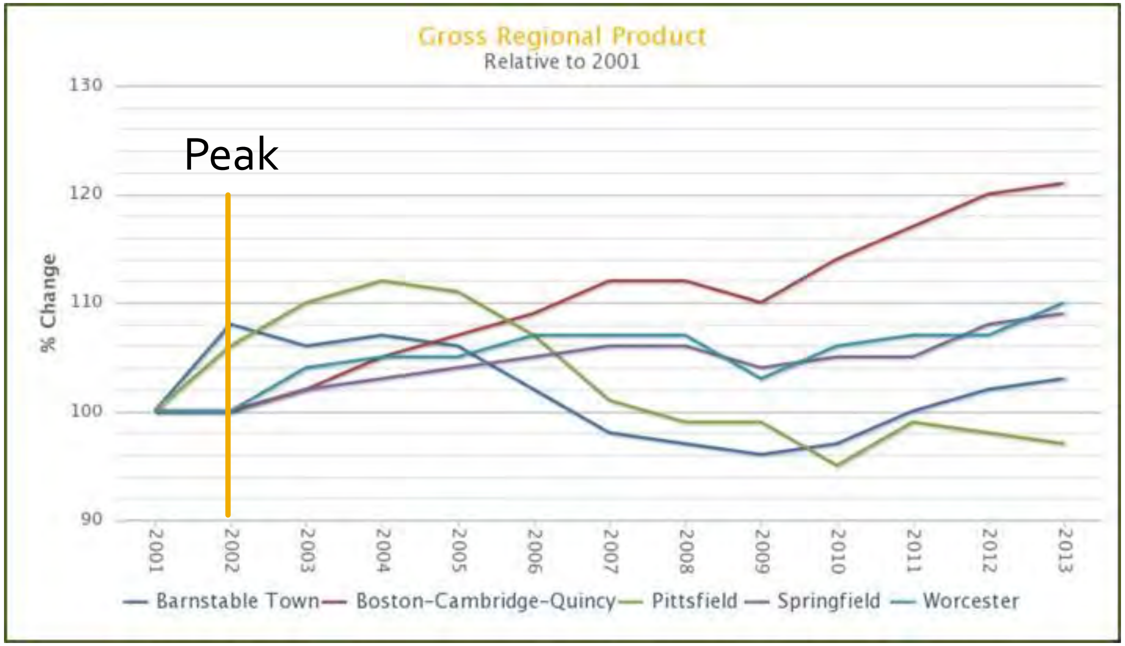
1. Unemployment rate at least 1% point higher than US average
2. Per capita income at 80% or less of the US average

13 Tracts out of 56 housing roughly ¼ of year-round population

Barnstable County Economic Distress Criteria			Region	U.S.	Threshold Calculations
2013 Unemployment Rate (5-Year ACS)			8.2	9.7	-1.5
2013 Per Capita Money Income (5-Year ACS			$36,142	$28,155	128.37%
Economic Distress Criteria—Geographic Components	Unemployment Rate 2013 ACS	Threshold Calculations	PCMI 2013 ACS	Threshold Calculations	Population Estimate 2013 5-Year Avg. ACS
Tract 0101.00	13.7	4	$45,204	160.6	2,964
Tract 0102.06	10.7	1	$39,276	139.5	3,012
Tract 0103.04	11.7	2	$38,586	137	2,001
Tract 0103.06	11.2	1.5	$34,793	123.6	2,944
Tract 0110.02	11.9	2.2	$33,077	117.5	4,330
Tract 0116.00	15.3	5.6	$26,988	95.9	2,978
Tract 0120.02	11.9	2.2	$26,797	95.2	3,021
Tract 0126.02	12	2.3	$22,175	78.8	4,675
Tract 0130.02	12.5	2.8	$59,647	211.9	3,398
Tract 0141.00	1.4	-8.3	$16,979	60.3	1,155
Tract 0146.00	11.6	1.9	$33,548	119.2	3,955
Tract 0152.00	10.8	1.1	$53,724	190.8	2,174
Tract 0153.00	15.1	5.4	$20,271	72	3,016

Evaluating the Region

- Gross Regional Product

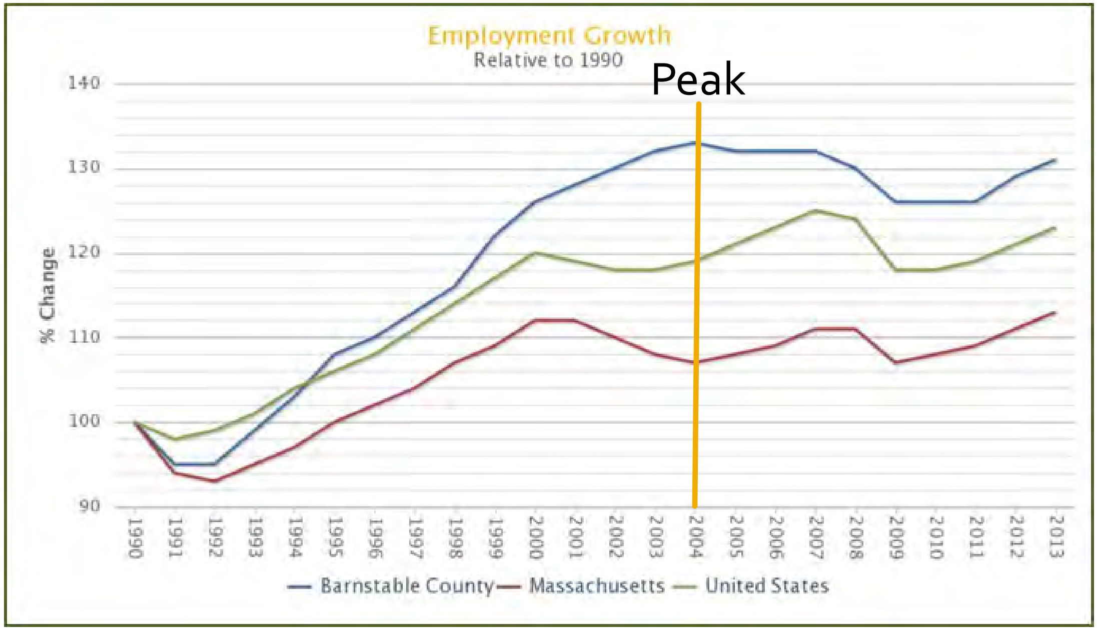


4 million below peak

9.4 Billion

Evaluating the Region

- Employment
  - Higher Growth Rates than MA and US

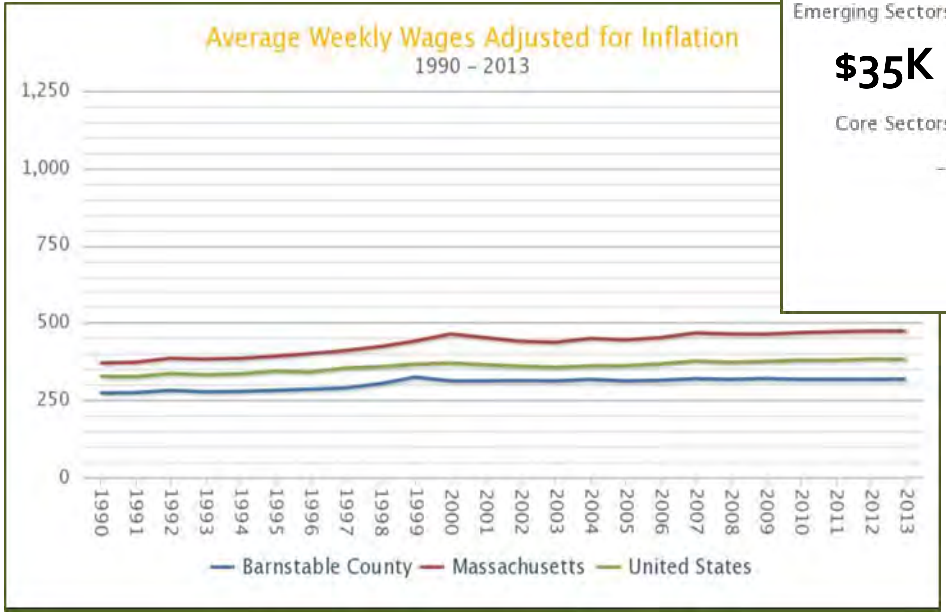


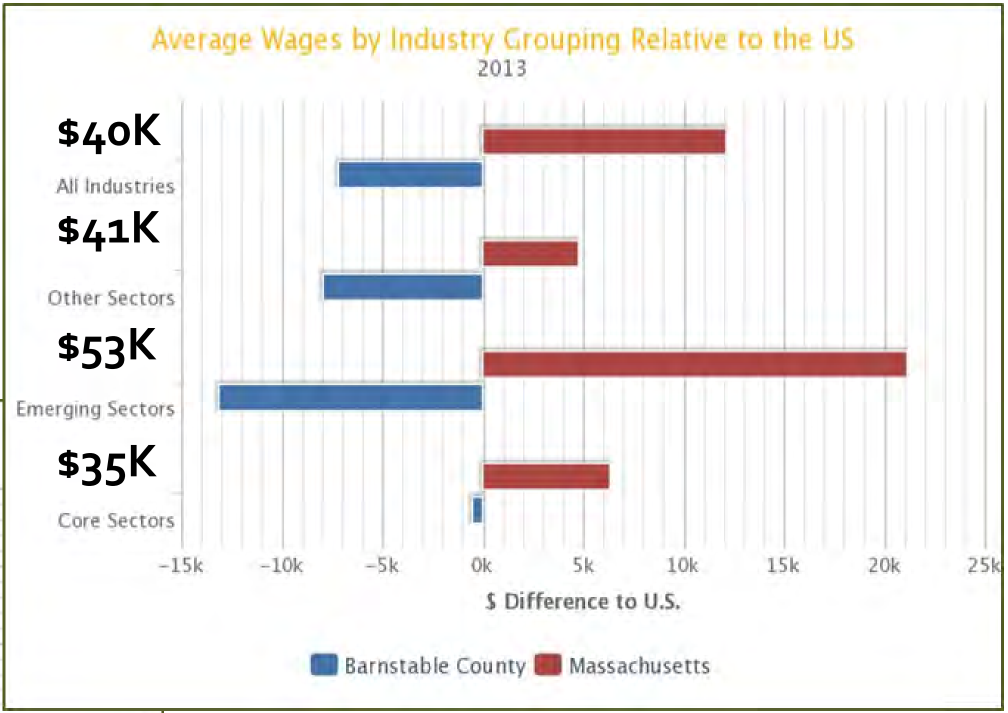
1,000 below peak

92,000

Evaluating the Region

- Wages



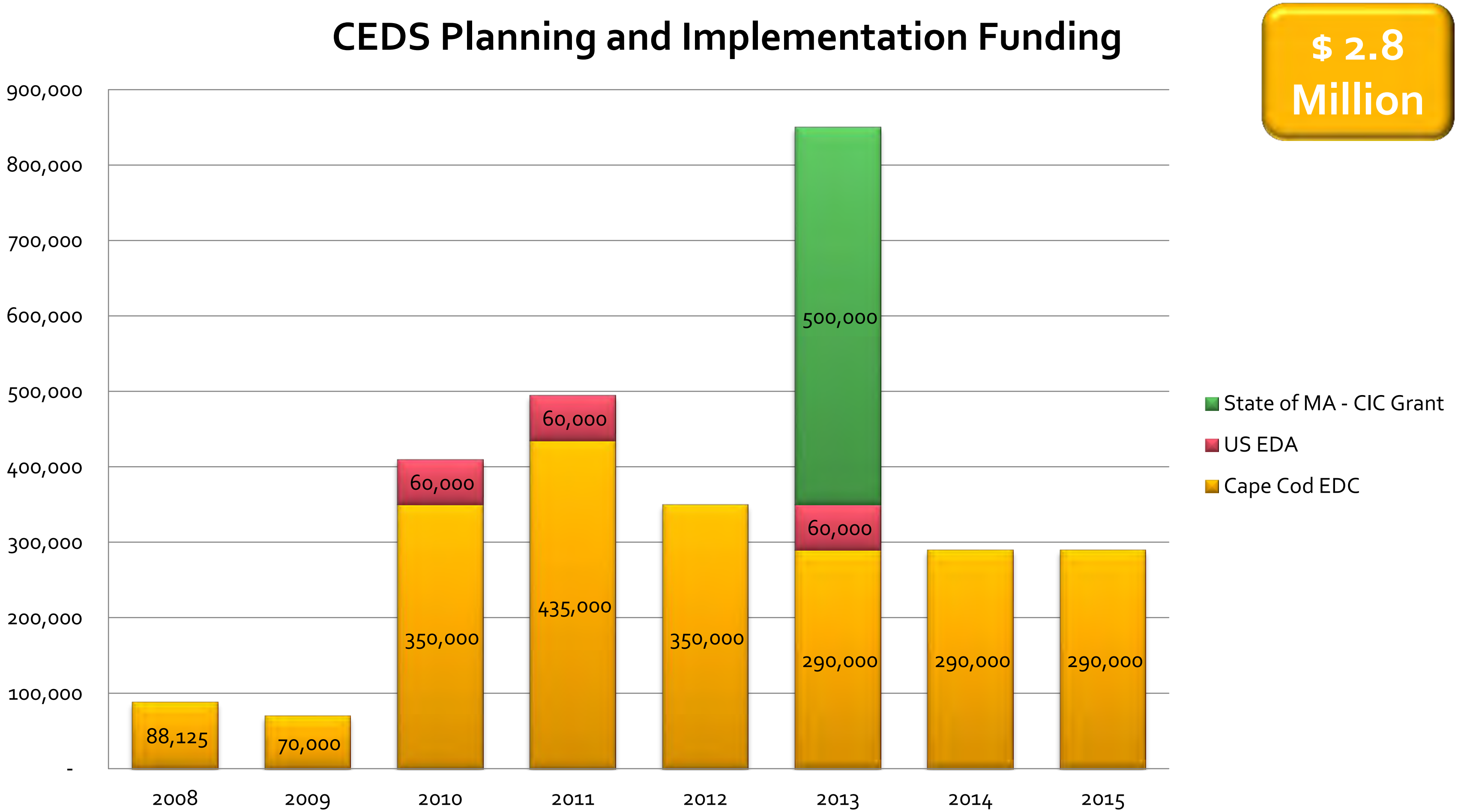


Evaluating the CEDS Planning Goal

To provide a forum for local and regional organizations to be actively involved in determining and executing economic development policies and projects.

- Measures
  - Capital Investment
  - Understanding Economic Development
  - Strong Partnerships
  - Easy Access to Information

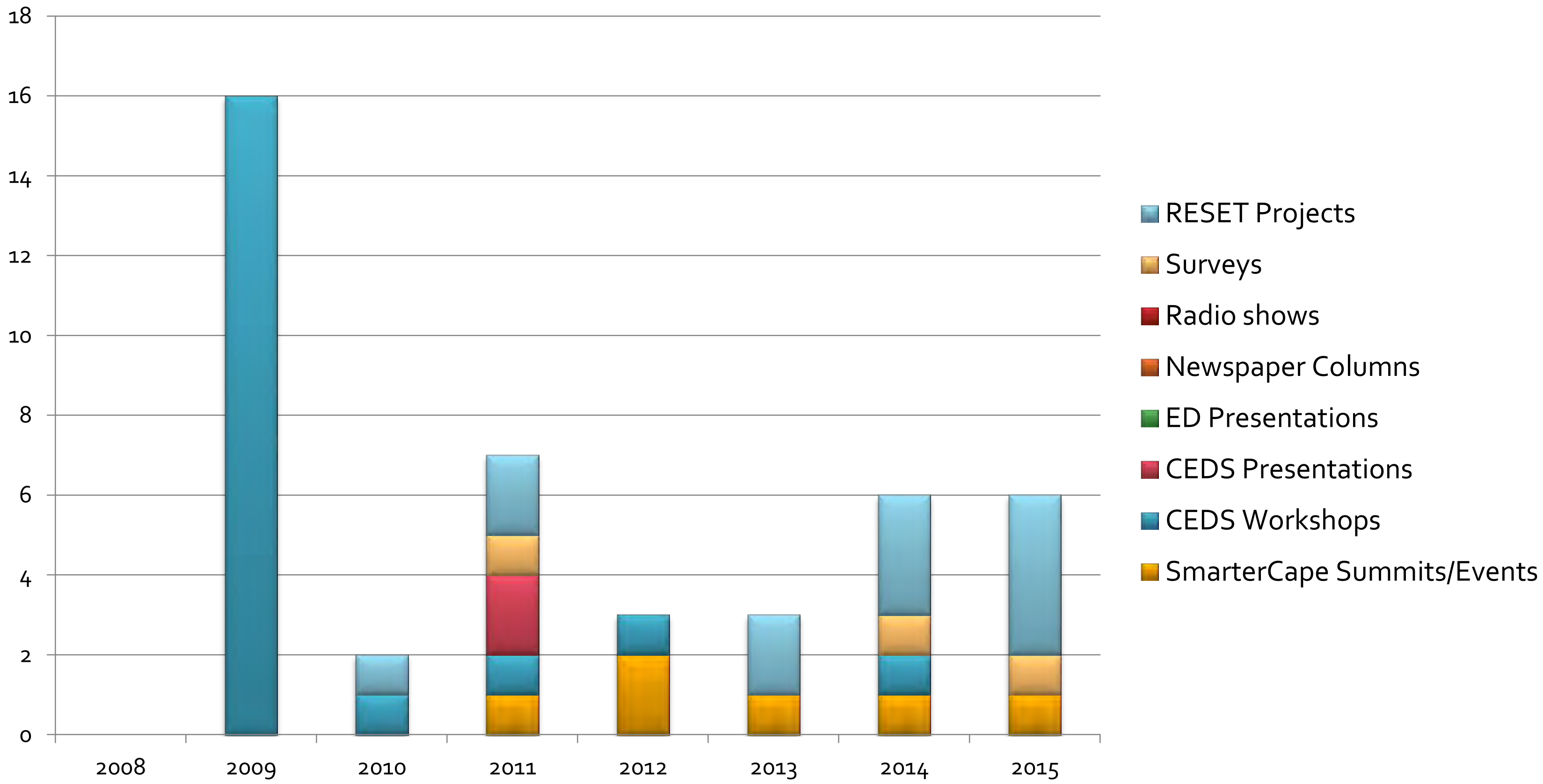
Capital Investment



$ 2.8 Million

Understanding ED

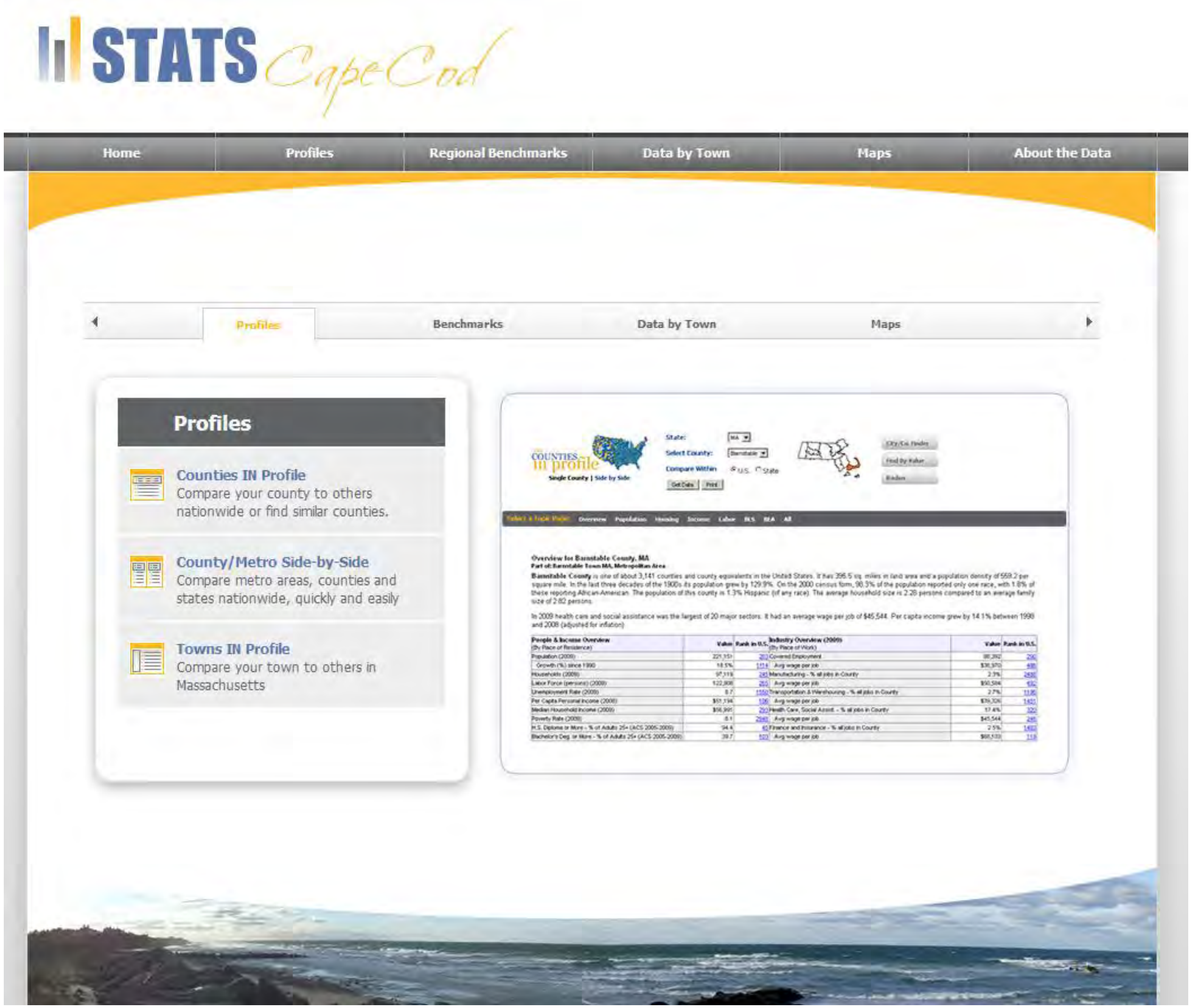
- Economic Development Outreach



Strong Partnerships

- Formal Partnerships
  - SmarterCape Partnership
  - RESET Project Towns
    - Yarmouth
    - Bourne
    - Sandwich
    - Falmouth
    - Orleans
    - Barnstable
    - Mashpee
  - Boards: CDP

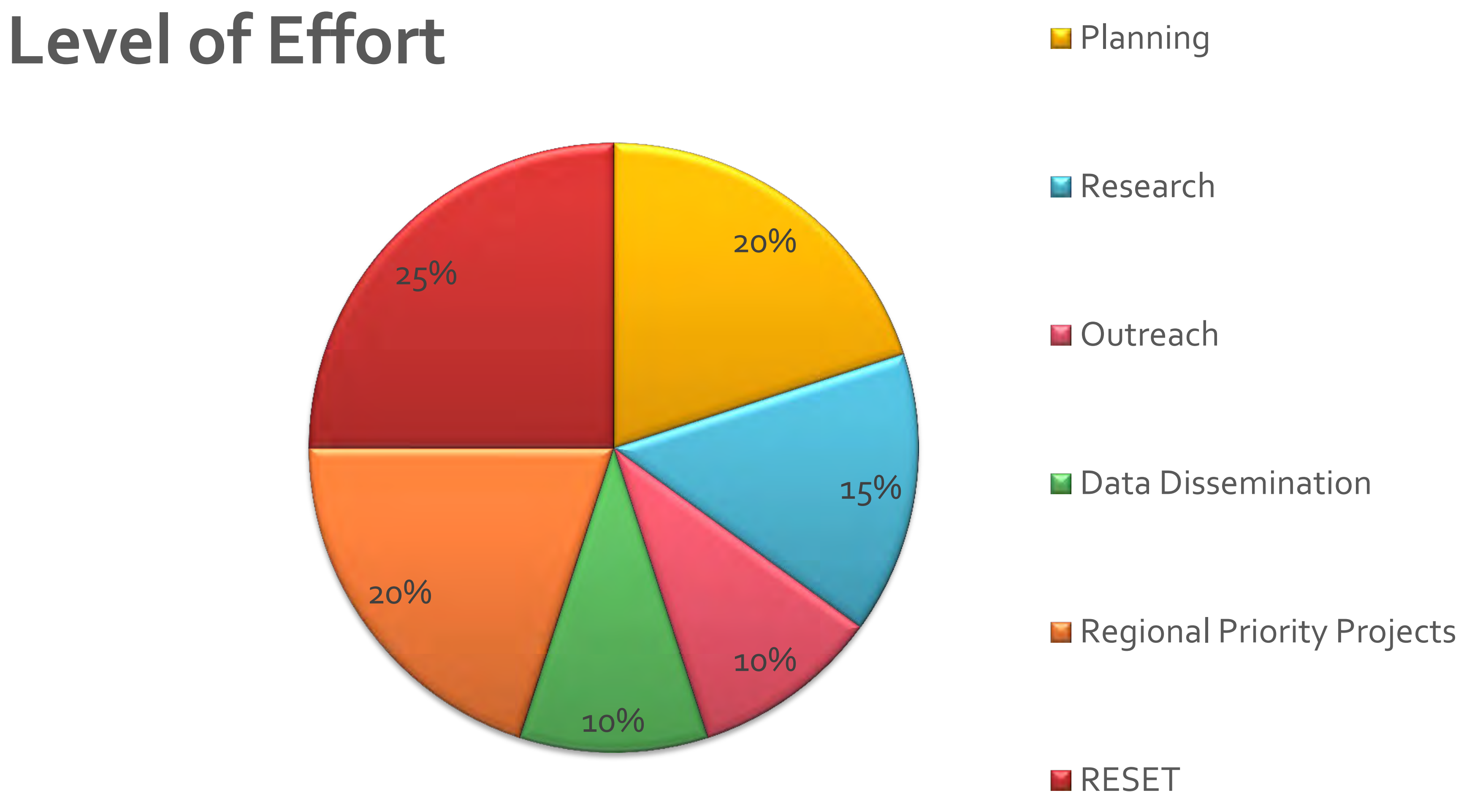
Easy Access to Information



Evaluating the Annual Work Plan

- Planning
- Research
- Outreach
- Data Dissemination – STATSCapeCod.org
- Regional Priority Project Implementation
- RESET – Targeted Town Technical Assistance

Evaluating the Annual Work Plan



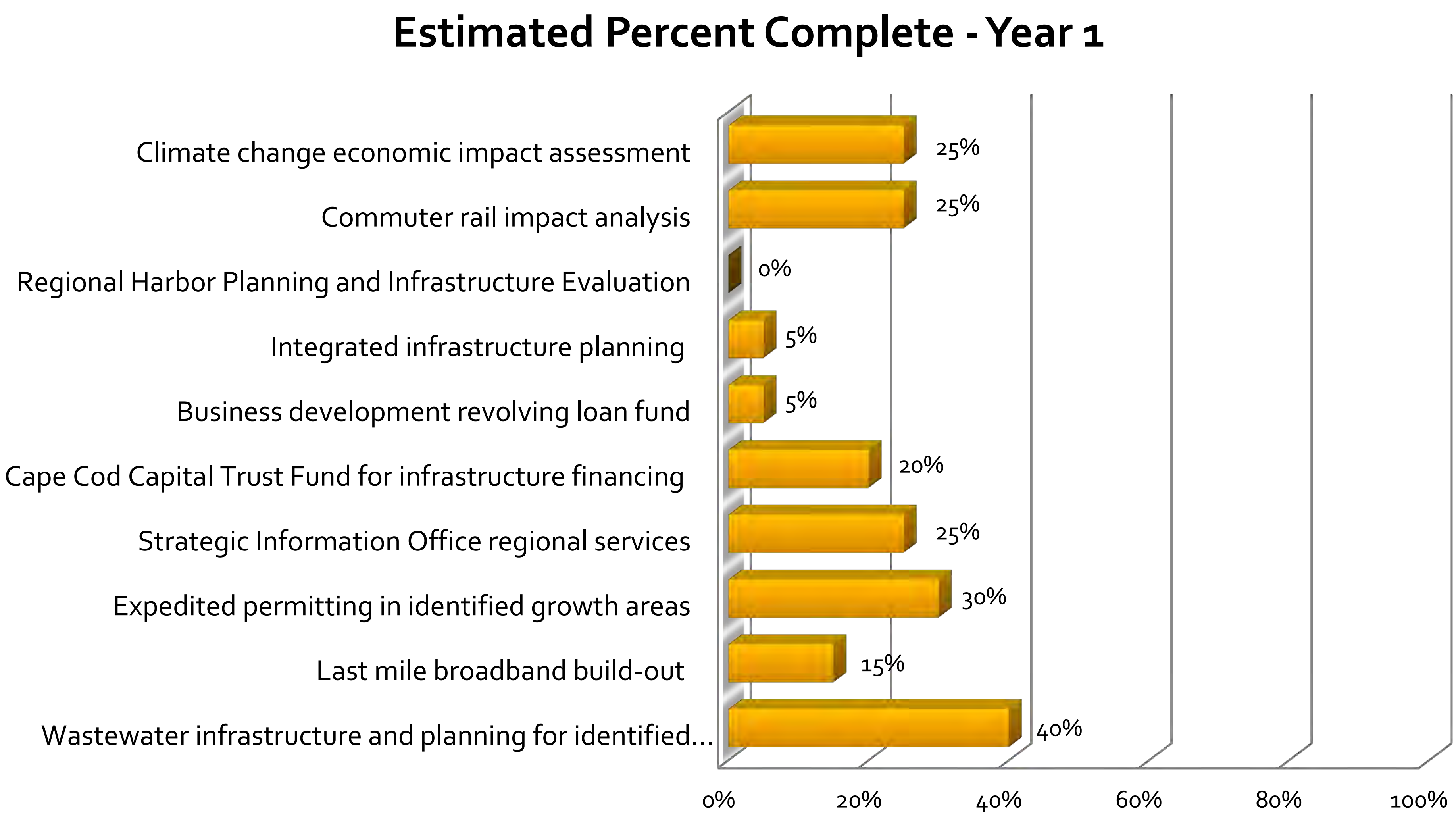
Evaluating the Regional Priority Projects

- Wastewater infrastructure and planning for identified growth areas
- Last mile broadband build-out
- Expedited permitting in identified growth areas
- Strategic Information Office regional services
- Cape Cod Capital Trust Fund for infrastructure financing

Evaluating the Regional Priority Projects

- Business development revolving loan fund
- Integrated infrastructure planning
- Regional Harbor Planning and Infrastructure Evaluation
- Commuter rail impact analysis
- Climate change economic impact assessment

Evaluating the Regional Priority Projects



Selected Goals for Year 2

- RPP Update
- STATSCapeCod
- Continued expansion of regional services (SIO)
- Cape Cod Capital Trust Fund
- RESET Projects
  - Orleans, Mashpee, Barnstable and Falmouth
- SmarterCape Summit

The CEDS Annual Report will be available on the Commission website

www.capecodcommission.org

Appendix 8: CEDS Approval by the Cape Cod Commission

3225 MAIN STREET • P.O. BOX 226
BARNSTABLE, MASSACHUSETTS 02630

(508) 362-3828 • Fax (508) 362-3136 • www.capecodcommission.org

CAPE COD
COMMISSION

JUNE 30, 2013

Ms. Tonia Williams, Regional Director
Economic Development Administration
U.S. Department of Commerce
Philadelphia Regional Office
The Curtis Center, Suite 140 South
601 Walnut Street
Philadelphia, Pennsylvania 19106-3323

Dear Ms. Williams :

Please accept the enclosed Cape Cod Comprehensive Economic Development Strategy (CEDS) Annual Report for Year 1 of our 2014 CEDS 5-Year Plan. The Annual Report has been approved by the CEDS Strategy Committee (the Cape Cod Economic Development Council) and by the Cape Cod Commission.

The CEDS over the past six years has given focus to the region's economic development efforts and spurred collaboration among stakeholders across the region. Our success is in part due to the support of EDA through three short-term planning funds that ultimately led to the region being designated an Economic Distress District (EDD). Past EDA funding has been pared with increased investment by Barnstable County in the implementation of the CEDS. At this time, annual funding associated with the EDD designation has not been forthcoming but we are hopeful that the EDA will be able to allocate funding soon to address the economic concerns that led to the designation.

The enclosed Annual Report documents our progress over the past year towards strengthening our regional economy and implementing the CEDS strategy. The report tracks the health of the regional economy, the effectiveness of the CEDS planning process to develop regional partnerships, and the accomplishments over the past year in terms of the implementation plan and the regional priority projects.

We look forward to your review of the Annual Report and thank you for your support of our local process.

Sincerely,

Paul Niedzwiecki
Executive Director

Richard Roy
Chair