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CAPE COD COMMISSION

JUNE 30, 2010

MR. Willie C. Taylor
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 Mr. Taylor:

Please accept the enclosed Cape Cod Comprehensive Economic Development Strategy (CEDS) Annual Report for Year 1 of our certified 2009 CEDS 5-Year Plan. This report reflects the many CEDS activities that have taken place during the past year, all a testament to the momentum created by the inclusive CEDS planning process and similarly inclusive evaluation process undertaken this spring. The Annual Report has been approved by the CEDS Strategy Committee (the Cape Cod Economic Development Council) and the Cape Cod Commission.

The CEDS has given focus to the region's economic development efforts. The most important regional priority project, the OpenCape Broadband Network, was awarded $32mil from the National Telecommunications and Information Administration to build the regional high-speed broadband network. The Cape Cod Commission was recently awarded $60,000 in CEDS planning support from the EDA and Cape Cod Sustainable Fisheries Trust is awaiting a decision from the EDA on its request for $2mil in support sustainable community fisheries. Multiple partner agencies are collaborating on other priority projects including Coastal Development Templates project, the Economic Centers Cost Analysis, Buy Local Infrastructure, and Entrepreneurial Capital Access and Training.

As part of this year's evaluation process, CEDS work groups identified four new projects were added to the roster of regional priority projects: Center of Excellence for Water Quality Technologies and Innovation; Waste Minimization; Regional Information Clearinghouse and Strategic Information Office; and Canal Area Assessment and Transportation Improvement.

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

CAPE COD COMMISSION

Cape Cod Comprehensive Economic Development Strategy (CEDS)

2010 Annual Report

June 30, 2010

Submitted To:
US Department of Commerce Economic Development Administration

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

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FOREWORD

This is the first annual report on progress towards implementation of the Comprehensive Economic Development Strategy (CEDS) for the Cape Cod region. It was prepared in 2009 in accordance with U.S. Economic Development Administration (EDA) guidelines and submitted to the EDA on June 30, 2009. The foreword outlines EDA's mission, investment policy, and expectations regarding the CEDS document, planning process, and implementation.

The Economic Development Administration (EDA)

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

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

1. *Be market-based and results-driven*. An investment will capitalize on a region's competitive strengths and will positively move a regional economic indicator measured on EDA's Balanced Scorecard, such as: an increased number of higher-skill, higher-wage jobs; increased tax revenue; or increased private-sector investment.

2. *Have strong organizational leadership*. An investment will have strong leadership, relevant project management experience, and a significant commitment of human-resources talent to ensure a project's successful execution.

3. *Advance productivity, innovation, and entrepreneurship*. An investment will embrace the principles of entrepreneurship; enhance regional industry clusters; and leverage and link technology innovators and local universities to the private sector to create the conditions for greater productivity, innovation, and job creation.

4. *Look beyond the immediate economic horizon, anticipate economic changes, and diversify the local and regional economy*. An investment will be part of an overarching, long-term comprehensive economic development strategy that enhances a region's success in achieving a rising standard of living by supporting existing industry clusters, developing emerging new clusters, or attracting new regional economic drivers.

5. *Demonstrate a high degree of commitment by exhibiting*:
    a. High levels of local-government or nonprofit matching funds and private-sector leverage
    b. Clear and unified leadership and support by local elected officials
    c. Strong cooperation between the business sector, relevant regional partners, and local, state, and federal governments

The Comprehensive Economic Development Strategy (CEDS)

The CEDS is both a document and a process. It is a process of analysis, planning, and taking action to generate new economic development activity and improve community infrastructure and services. Certification of this document by the EDA allows the region and the towns herein to qualify for funding from the various EDA grant programs. Funding may be sought from EDA for the projects identified in this document as priorities for the region.

The CEDS Planning Process: Regional Planning Authorities (RPAs) across the county are responsible for developing and implementing a CEDS for their region. The RPA for Barnstable County is the Cape Cod Commission. The CEDS process begins with the selection of a "CEDS Strategy Committee." The Committee is responsible for convening the planning process and overseeing implementation of the plan. The Committee must be representative of the economic development community within the region including business, industry, government, service and non-profit organizations, minority populations, and training and educational entities.

The CEDS Document: There are two types of CEDS reports: the five-year update and the interim annual reports. The five-year CEDS update completed in 2009 included the following:

1. CEDS Planning Process: A description of the planning process
2. CEDS Context: An analysis of the regional economy using available data & research
3. CEDS Vision: An expression of the region's economic aspirations
4. CEDS Action Plan: An account of the region's priorities over the next five years
5. CEDS Implementation & Performance Measures: An outline of the plan's implementation and a method for measuring progress on specific priority projects and towards meeting the CEDS goals overall.

During the interim years, the annual reports track progress toward meeting the region's economic development goals and completing the priority projects in the CEDS. The annual report documents any changes in regional conditions and priorities.

EXECUTIVE SUMMARY

The Barnstable County Comprehensive Economic Development Strategy (CEDS) has been in effect for a year; this annual report highlights the accomplishments made in Year 1 and outlines the action plan for Year 2.

Overall, the CEDS has invigorated regional collaboration around economic development. It has helped bring about new partnerships and programs. There is a general sense that the many organizations that touch on economic development are moving in a unified direction with shared goals. This alone is evidence of the success of the CEDS process. The CEDS document has been used effectively by a number of stakeholders in requesting funding for regional priority projects identified in the document – another indicator of success. CEDS stakeholders have moved forward with most of the regional priority projects. The biggest win is the full funding of our highest priority project, Open Cape: a telecommunications backbone for the region. Overall, this has been an exciting year that proves a CEDS can be much more than simply a document sitting on a dusty shelf.

Summary by Chapter

CEDS Structure and Process: Chapter 1 outlines the planning structure and the approach taken to develop both the 5-year plan and the annual report for Year 1. The cornerstone of the planning process has been the CEDS Work Groups. The Work Groups brought together economic and workforce development practioners, policy makers, and business leaders to identify 16 regional priority projects; they were reconvened after one year to evaluate how much and how well these projects have been implemented. The CEDS Strategy Committee known as the Cape Cod Economic Development Council has been the driving force behind implementation through their investment of $350,000 per year toward the implementation of the priority projects, data dissemination efforts, and targeted technical assistance to towns. The Cape Cod Commission has staffed this effort under the leadership of the Executive Director and the Economic Development Officer.

CEDS Vision: Chapter 2[1] outlining the CEDS vision and goals remains unchanged from the 5-year plan completed in 2009. The CEDS continues to be based on the Regional Policy Plan (RPP), incorporating the regional growth policy and set of four economic development goals in the RPP. In addition, the CEDS outlines a long-term vision for economic development and a specific goal relating to the CEDS process itself.

CEDS Context: The economy of Cape Cod continues, even in these difficult fiscal times, to be heavily dependent on the tourism and second home industry. Yet the Cape is less seasonal than in the past; it is home to advanced manufacturing firms in marine technology and plastics, information technology firms, and a plethora of sole proprietors

[1] Chapter 3 in the 5-Year Plan

working across every industry. Highlighted in this Chapter of the report are the results of the Second Home Owner Survey completed for the Cape Cod Commission and released in the Spring of 2009. Chapter 3 also includes regional benchmarks measuring data trends that impact the balance of the regional economy and its ability to generate wealth in the region. These benchmarks are designed to reflect the CEDS goals outlined in Chapter 2 of this report.

CEDS Action Plan: Chapter 4 focuses on the CEDS action plan for Year 1 and the proposed action plan for Year 2. The summary table for the Year 1 action plan indicates what action steps have been taken, and includes any clarifying comments on the work completed. A similar looking table for Year 2 outlines the tasks that the Cape Cod Commission, in partnership with CEDS stakeholders, plan to complete over the coming year. This includes a schedule of when different activities are expected to occur and lists who is responsible for ensuring the work is completed. The final section in this chapter looks at process and outcome measures of success relative to implementation of the action plan.

CEDS Priority Projects: The 16 regional priority projects identified in the 2009 5-Year CEDS varied greatly in terms of readiness to proceed. In a number of cases, teams had already coalesced around a specific scope of work. The best example of this was the Open Cape Project which received $40Million in Federal, State, and private funding by the Spring of 2010. Other projects were more broadly conceived and a great deal of work was spent developing a strong project team and leadership structure; the two most successful projects of this type were the Entrepreneurship Capital Access & Training Program and the Buy Local Infrastructure Development Program.

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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 region completed its most recent five-year update of the Comprehensive Economic Development Strategy (CEDS) in June 2009. This plan was approved by the EDA in July 2009. In completing the 5-year update, the region chose a unique, intensive planning process in order to address current conditions and add focus to economic development in the region. The CEDS is built on the 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 Commission Act, 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 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 to regulate developments that are considered to have regional impact, oversee land-use planning on Cape Cod, and recommend the designation of areas as Districts of Critical Planning Concern (DCPC).

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

The Cape Cod Commission
Organizational Structure
http://www.capecodcommission.org/staff.htm

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 (4.5)
- Economic Development Officer (CEDS Project Manager)
- Economic Development Specialist
- Economic Development Special Projects Coordinator
- Economic Development Data Center Programmer
- Economic Development Council Administrative Asst. (.5 FTE)

Other Staff Resources (~40)
- Executive Director
- Director of Technical Services/Chief of Staff
- Chief Planner
- Chief Regulatory Officer
- Land Use and Natural Resource Planners
- Transportation Engineers & Planners
- Hydrogeologists & Hydrologysts
- Regulatory Staff

The CEDS Planning Structure

The CEDS Lead Agency: The Cape Cod Commission is the regional planning authority for the Cape Cod region. It is a department of Barnstable County but with independent powers established under the Cape Cod Commission Act outlined above.

The Commission is made up of 19 members representing each town on Cape Cod, the County of Barnstable, the Governor, and both the Native American and minority communities on Cape Cod. Established in 1990 as the regional planning and regulatory authority for the Cape, the Commission is charged with promoting sustainable development. The Commission is supported by a staff of full-time planners and technical specialists in the areas of water resources, transportation, housing, natural resources, coastal and marine resources, and economic development. The 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; and
- 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 Work Groups: As part of the 2009 5-year update of the CEDS, regional organizations important to economic development on the Cape were asked to participate on a Work Group charged with selecting priority projects most likely to prepare the region for long-term economic growth. Five Work Groups were established representing the different aspects of economic development:

- Infrastructure Development,
- Workforce Development,
- Industry Sector Development,
- Business Development, and
- Business Climate.

Sixty-one people participated on the Work Groups representing the business leaders, chambers of commerce, economic development entities focused on technology, alternative energy, and the arts, cranberry growers, fishermen, housing and community development organizations, workforce development entities, county and state agencies, and municipalities. Participants and their affiliations are listed in Appendix **.

Development of the CEDS 5-Year Plan:

The Cape Cod Commission (CCC) and the Cape Cod Economic Development Council (EDC) devoted an unprecedented amount of financial and staff resources to the development of the 2009 five-year update and its implementation. The Commission designed an innovative and intensive public planning process. Achieving the ambitious planning goals and schedule was made possible with funding from the EDC. Unlike the typical protracted planning process, this took just two months from start to finish. The process build on the year-long Regional Policy Plan public process just completed in December 2008 and focused most on development of regional priority projects. Participation was primarily achieved using a Work Group structure, supplemented by several Focus Group sessions, and a two-week public comment period. (See 5-Year CEDS for a detailed description of the process)

The CEDS was endorsed by the Strategy Committee, which again is the Cape Cod EDC, and adopted by the Cape Cod Commission on behalf of Barnstable County. The schedule of the adoption process was as follows:

- Cape Cod Commission Planning Committee (May 26th, 2009)
  Reviewed the CEDS Chapters and Priority Projects; recommended approval by the full Commission
- Cape Cod Economic Development Council (June 4th, 2009)
  Endorsed CEDS & recommended adoption by the Cape Cod Commission on behalf of Barnstable County; incorporate CEDS implementation into workplan
- Cape Cod Commission (June 11th, 2009)
  Certified that the CEDS is consistent with Regional Policy Plan and Adopt for implementation

Implementation of the CEDS 5-year Plan: Evaluating Year 1

Implementation of the CEDS began as soon as the CEDS was approved locally and delivered to the EDA. The Cape Cod Economic Development Council voted in June 2009 to dedicate $350,000 annually for three years to the implementation of the CEDS. As the regional planning agency responsible for the CEDS, the Cape Cod Commission is the grant recipient, using the EDC funding to hire the economic development staff necessary to realize the CEDS action plan for Year 1 as outlined in the 2009 Update of the CEDS. The action plan includes helping get the 16 regional priority projects off the ground, improving data dissemination, and providing technical assistance to towns through an intensive process called “RESET.”

Cape Cod Commission Economic Development Staffing for CEDS Implementation

- Economic Development Officer (Leslie Richardson)
- Economic Development Specialist (Dan Dray)
- Special Projects Coordinator (Sandra Perez)
- Virtual Data Center Programmer (Ryan Ellison)
- Administrative Assistant (Taree McIntyre) (.5)

The annual evaluation process took place during the months of April and May 2010. The process was designed to continue the high level of engagement by regional stakeholders that characterized the 5-year Update process. The evaluation process was made up of three parts:

1. CEDS Work Plan Evaluation by the CCEDC
2. Priority Project Evaluation by the CEDS Work Groups
3. Adoption of Year 2 Action Plan (Priority Project Milestones and the CCC's CEDS Work Plan) by CEDS stakeholders

✭ <u>CEDS Action Plan Evaluation</u>

The 2009 CEDS 5-Year Plan included an action plan that outlined the work of the Cape Cod Commission for Year 1. The Cape Cod Economic Development Council, as the Strategy Committee and the funding entity for CEDS implementation, was responsible for evaluating how effective the Commission was in completing the CEDS work plan for Year 1. The EDC reviewed progress on the plan – identifying those activities where the Commission had been successful as well as those that had been less so. The measures of success were reviewed and some new measures were identified for Year 2. Priorities for Year 2 were established by the EDC while reviewing the plan of work proposed for the second year of implementation. The results from this process are included in Chapter 4.

✭ <u>Priority Project Evaluation</u>

The five CEDS Work Groups were reconvened in April 2010 to evaluate the community's progress towards implementing the 16 priority projects. Each Work Group had selected three projects in 2009 as priorities; they were asked to assess progress on these same projects after Year 1. Each group met for a three hour session to review each project. They looked at whether a strong project team had been developed, if an implementation plan had been completed, what efforts had been made to obtain funding for project implementation, and what work on actually bringing the project to fruition had taken place.

The next step in the priority project evaluation process was to identify milestones for Year 2 implementation and determine if any projects should be retired from the list. The Work Groups were also given the opportunity to nominate new projects to the list if issues or initiatives were developing that needed to be addressed in the CEDS process and plan. Four new projects were identified, two of which are inter-related.

The results from the EDC and the CEDS Work Groups evaluation efforts were presented at a region-wide stakeholders meeting on May 12, 2010. Project summaries were prepared and distributed for the new projects proposed, and detailed project status summary tables were prepared for all the priority projects (See Chapter 5 for these documents).

✯ Adoption of Year 2 Action Plan

Once the evaluation process was completed, staff compiled all the new information into this CEDS Annual Report for adoption by the Strategy Committee, and ultimately by the Cape Cod Commission 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 is updated on a five year cycle. The RPP was updated just prior to the 5-year Update of the CEDS. As a result, there are no changes to this chapter outlining the vision, growth policy, or goals of the CEDS.

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 our ecosystems and have been the first to suffer from our failure to see the links between our 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, they are unlikely to be realized.

The Region's Growth Policy

The Cape Cod Commission does not have 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, that 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 center 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 business 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 Region's Economic Development Goals

There are four economic development goals 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.

The Low-impact & 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 based on differentiating your product from your competitors and maximizing profits by running a tight ship.

Achieving the goal of compatible development will require creativity and innovation. Economic development tactics that will have a significant impact on the long-term prosperity of the Cape will be strategic investments in wastewater infrastructure, an elimination of large lot strip and subdivision zoning in favor of mixed-use, village style zoning, and a system of transferable development rights under which a shift in development patterns is economically viable. Combined with targeted regulation, these tools could be used to ameliorate some of the 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 will be located in accordance with the RPP Growth Policy and Regional Land Use Vision Map.
- Infrastructure investments will primarily serve those areas designated for development and redevelopment.

Goal - ED2: A Balanced Economy
*T*o 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 salt production, whaling, and glass manufacturing. The Cape Cod Commission will encourage 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 down-loaded 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. The process resulted in such eagerness to act that several projects are already preparing applications to the EDA for funding. 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 this year's 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, expand, and create new partnerships between organizations and people traditionally involved in economic development and those not typically working in this arena
- 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 CONTEXT

New Developments & Trends during Year 1

The nation has undergone major economic and financial dislocation beginning in the year preceding the CEDS 5-year plan and extending to the present day. Cape Cod has not been spared during this downturn; with an economy heavily dependent on disposable income, the Cape has been as hard hit as any other resort area with high rates of unemployment, bankruptcy, home foreclosures, and declining incomes.

This Chapter outlines the basic structure of the regional economy using standard demographic and economic data. In addition to the standard data this chapter presents:

1. New business and psychographic data acquired from ESRI as part of their "Business Analyst" product,
2. New survey research about Cape Cod second home owners compiled for the Cape Cod Commission by the University of Massachusetts Donahue Institute, and
3. New benchmarks designed by the Cape Cod Commission to gauge Cape Cod's economic balance and regional wealth overtime.

Description of the Cape Cod Regional Economy

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

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

Beginning in the 1970's the Cape has seen enormous rates of growth in resident and summer populations. Growth has slowed in the ladder half of the current decade but actual growth will not be truly understood until the results of the 2010 Census are known. In any event, current population levels and development patterns are already impacting the environment as demonstrated by ongoing problems with water quality and the need to develop treatment infrastructure to manage current demand, let alone growth. The economic development questions for Cape Cod therefore focus most on the quality of our existing economic base, the skill development of our existing population, and the focusing of any new growth to those areas best able to serve it with infrastructure efficiently and in the most cost effective manner.

Quick Facts: The following table compares population and income for Barnstable County with the state and the nation using the most up-to-date data available. While at first glance the Cape looks like an economic development success, the data belie the real socio-economic differences between population groups and the cost rapid growth has imposed on the environment which is only just now beginning to be felt by the taxpayers.

People & Income Overview (By Place of Residence)	Barnstable County, MA	Massachusetts	United States
Population(2009)	221,151	6,593,587	307,006,550
Growth (%) Since 1990	18.50%	9.60%	23.40%
Growth (%) Since 1970	128.80%	15.90%	51.00%
Land Area (in sq. miles)	395.5	7,840.00	3,537,438.40
Population Density (2009)	559.2	841	86.8
% Reporting One Race Only (2000)	98.30%	97.70%	97.60%
% Reporting Only African American (2000)	1.80%	5.40%	12.30%
% Reporting Hispanic (of any race) (2000)	1.30%	6.80%	12.50%
Households (2000)	94,822	2,443,580	105,480,101
Total Housing Units (2000)	147,083	2,621,989	115,904,641
Labor Force (2009)	122,908	3,473,497	154,142,000
Unemployment Rate (Annual - 2009)	8.7	8.4	9.3
Total Average Wage (2008 by place of work)	$38,697	$60,552	$50,259
Per Capita Personal Income (PCPI) (2008)	$51,194	$50,897	$40,166
10 Year PCPI Growth (%) adj. for inflation	17.60%	18.50%	13.10%
Poverty Rate (2007)	6.6	10	13
H.S. Diploma or More - % of Adults 25+ (2000)	91.80%	84.80%	80.40%

Source: Multiple; STATSCapeCod.org

Population over this decade has been stable with increases early on and reductions in subsequent years such that the year-round population estimates for 2009 is very close to the 2000 Census population figure. This is a welcome trend relative to the extremely rapid growth in the prior three decades that has led to negative environmental and land-use impacts. Wages on Cape Cod continue to be significantly lower that in Massachusetts and the US as a whole while per capita income (2008) is actually higher than these counterparts and poverty rates are lower. The population of the Cape is also more educated than the average.

Employment & Wages by Sector: The majority of jobs on Cape Cod in 2008 are in two sectors closely tied to tourism: retail (17.2%) and accommodations & food service (15.6%). The average annual wage in the retail sector is $27,743, while average wages in accommodations & food service is $20,371 annually. The 2008 county average wage was $38,839. Actual wages in both sectors may be marginally higher because employment data does not account for the many part-time or seasonal jobs in these industries. A significant portion of activity in these industries is seasonal, being related to tourism and second homeowners, particularly on the Outer Cape, where the year-round population remains relatively small.

Industry Distribution of Jobs in 2008	**Barnstable County, MA**		**Massachusetts**		**United States**	
Covered Employment	Jobs	Avg. Wage	Jobs	Avg. Wage	Jobs	Avg. Wage
Total Covered Employment & Wages	91,462	$38,839	3,245,983	$56,746	134,805,659	$45,563
Private	84.80%	$36,876	87.20%	$57,283	84.00%	$45,371
Agriculture., forestry, hunting	0.20%	$32,658	0.20%	$45,736	0.90%	$26,104
Mining	0.10%	$54,361	0.00%	$51,838	0.50%	$87,142
Construction	6.60%	$48,940	4.40%	$61,277	5.40%	$48,874
Manufacturing	2.40%	$49,805	8.80%	$69,008	10.00%	$54,457
Wholesale trade	1.70%	$50,673	4.20%	$76,971	4.40%	$61,843
Retail trade	17.20%	$27,743	10.70%	$27,701	11.40%	$26,178
Transportation, warehousing	2.60%	$38,089	2.90%	$44,855	4.00%	$44,976
Utilities	0.50%	$91,455	0.40%	$89,275	0.60%	$76,250
Information	2.00%	$46,545	2.90%	$82,712	2.30%	$68,825
Finance and Insurance	2.50%	$66,689	5.50%	$118,986	4.40%	$85,188
Real Estate, rental, leasing	1.70%	$31,290	1.30%	$56,452	1.60%	$43,190
Professional, technical services	4.90%	$62,149	8.00%	$96,730	5.90%	$74,293
Mgmt. of companies, enterprises	0.60%	$48,724	1.90%	$100,443	1.40%	$94,841
Administrative, waste services	3.80%	$34,153	5.20%	$38,648	6.00%	$32,188
Educational services	7.00%	$44,179	9.90%	$50,534	9.00%	$41,525
Health care, social assistance	16.30%	$45,259	15.40%	$49,827	12.90%	$42,716
Arts, entertainment, recreation	2.90%	$28,327	1.50%	$34,997	1.80%	$31,416
Accommodation and food services	15.60%	$20,371	7.90%	$19,293	8.50%	$16,753
Other services, exc. public admin.	4.30%	$28,924	4.00%	$28,242	3.40%	$28,894
Public Administration	5.80%	$55,248	4.20%	$57,602	5.50%	$52,750

Source: US Bureau of Labor Statistics(BLS)

The third largest industry in terms of employment is health care and social services (16.3%), with an annual average wage of $45,259 in 2008. This industry does pay higher wages and provides full-time jobs with benefits for most employees. Jobs in this industry cover the full range of skill levels and, with the aging population, this industry is expected to continue to provide career opportunities over the next several decades. Public administration, construction, and educational services each represent between 5 – 10% of employment on Cape Cod. The rest of the regional economy is made up of smaller industry sectors, each employing less than 5% of those working in the county.

Regional Industry Clusters: Research conducted in 2003/2004 by Dr. Michael Porter, Harvard University Institute for Strategy and Competitiveness, indicates that the Cape has a number of emerging industries with the potential to diversify and expand the region's economy. He identified clusters of activity in the following sectors:

- Marine research & technology,
- Arts and culture,
- Information & related technology, and
- Education & knowledge creation.

Renewable energy and related technology could well be added to this list.

The Cape Cod economy, like any economy, is made up of traded sectors and local service sectors. Traded sectors export goods and services and are generally the focus of economic development. On Cape Cod the dominant traded sector is tourism – tourists and second homeowners earn their money off-Cape but spend it here, thus increasing the size of the Cape economy. Traditional industries such as fishing, shell-fishing, and cranberry cultivation are traded/export sectors. The Cape's emerging export based marine and information technology sectors are important to the future growth of our economy, as is the arts and culture sector, that is increasingly selling products both off-Cape and to tourists. The opportunity to sell products via the Internet has already contributed to growth in off-Cape sales and exports. Infrastructure planning, land use policies, and development regulations should support and encourage an expansion of the Cape's traded sectors.

Local service sectors are generally understood to circulate money within the local economy. Yet, local service sectors can also have a role in economic growth through local business ownership and the provision of goods and services locally that were previously purchased outside the region. Luckily for the Cape, the vast majority of local service businesses are locally owned. Most regions have seen their local service sectors – from banking to retail – saturated by national corporations, chains, and formula businesses. We found that prior to the current economic recession, as our per capita income rose, the Cape had been attracting the attention of national competitors. When the economic recovery gets underway and land prices once again begin to increase, local businesses are going to find it more and more difficult to compete with non-local corporations.

Business Establishments, Employment & Estimated Sales Volume: In 2009, the Cape Cod Commission invested in the ESRI product "Business Analyst" that provides data on business enterprises collected by InfoUSA and demographic data, including forecasts and purchasing patterns, developed from a variety of sources. The data has been found to be flawed but at the aggregate level does provide some insight into the regional economy and has therefore been included in this report.

The ESRI data confirms the high value of manufacturing to the region's economy, a fact that is often lost due to the region's reputation as a tourist destination. Tourism's importance is seen in the high sales volume of the retail industry primarily.

Companies, Employees, & Estimated Sales Volume ($1,000) Cape-wide						
SECTOR TYPE	Number of Companies		Employees		Estimated Sales Volume	
Eating/Drinking	883	5.9%	12,657	11.6%	608,408	2.9%
Entertainment/Amusements	394	2.6%	3612	3.3%	366,224	1.7%
Hotel/Motel/Inn	510	3.4%	5811	5.3%	438,572	2.1%
Industry/Manufacturing	3,289	22.0%	16,994	15.6%	9,678,293	45.5%

Companies, Employees, & Estimated Sales Volume ($1,000) Cape-wide						
SECTOR TYPE	Number of Companies		Employees		Estimated Sales Volume	
Office	5,236	35.0%	39,592	36.3%	4,412,847	20.7%
Public Administration	540	3.6%	8614	7.9%	0	0.0%
Retail/Services	3,826	25.5%	20,807	19.1%	5,648,177	26.6%
(blank)	302	2.0%	976	0.9%	114,226	0.5%
Grand Total	14,980	100.0%	109,063	100.0%	21,266,747	100.0%

Source: ESRI Business Analyst 2009

The geographic center of the Cape's economy is the town of Barnstable – particularly the Hyannis area. The area is home to almost a quarter of all the establishments on the Cape and over a quarter of the workforce according to the ESRI data. In terms of output, Barnstable generates almost a third of all sales volume for the entire region. The town of Falmouth with its marine sciences and technology cluster is the second most productive area on the Cape with 14.1% of total sales volume and 15.7% of employment. The rest of the towns on the Cape are individually less than 10% of the Cape's overall number of establishments, jobs, and estimated sales volume.

Companies, Employees, & Estimated Sales Volume ($1,000) by Town						
Town	Number of Companies		Employees		Estimated Sales Volume	
Barnstable	3,719	24.8%	28,752	26.4%	6,263,454	29.5%
Bourne	1,140	7.6%	9,618	8.8%	2,086,815	9.8%
Brewster	488	3.3%	3,983	3.7%	453,506	2.1%
Chatham	681	4.5%	3,856	3.5%	629,908	3.0%
Dennis	1,034	6.9%	5,805	5.3%	1,329,219	6.3%
Eastham	291	1.9%	1,681	1.5%	285,606	1.3%
Falmouth	1,847	12.3%	17,158	15.7%	3,000,601	14.1%
Harwich	839	5.6%	4,906	4.5%	949,448	4.5%
Mashpee	749	5.0%	5,211	4.8%	1,007,249	4.7%
Orleans	859	5.7%	5,491	5.0%	1,498,203	7.0%
Provincetown	677	4.5%	3,424	3.1%	693,456	3.3%
Sandwich	917	6.1%	6,642	6.1%	1,164,079	5.5%
Truro	185	1.2%	674	0.6%	127,154	0.6%
Wellfleet	315	2.1%	1,628	1.5%	296,412	1.4%
Yarmouth	1,239	8.3%	10,234	9.4%	1,481,637	7.0%
Total	14,980	100.0%	109,063	100.0%	21,266,747	100.0%

Source: ESRI Business Analyst 2009

Included in the ESRI Business Analyst package is psychographic data on the population; these are commonly used for marketing purposes. The dominant population groupings on Cape Cod are:

Silver and Gold - 28,488

With a median age of 59.6 years, they are the second oldest of the Tapestry segments. These are wealthy, educated seniors, usually retired from professional careers. Their median household income is

$69,774, and their median net worth is $365,407; they rank second of the segments for the percentage of seasonal housing. They have the free time and resources to pursue their interests, such as traveling. They prefer to shop by phone from catalogs such as L.L. Bean and Lands' End. They are also interested in home improvement and remodeling projects. Golf is more a way of life than just a leisure pursuit. They also go to horse races, and enjoy bird watching, saltwater fishing, power boating, and are avid readers of biography and mystery books. They eat out, attend classical music performances, and relax with a glass of wine. Favorite restaurants include Outback Steakhouse, Cracker Barrel, and Applebee's.

Rural Resort Dwellers - 17,857

The median age is 47.2 years; the median household income is $48,105 and the median net worth is $111,790. Of the Tapestry segments, they have the highest percentage of seasonal housing, 16 times higher than the national level. These residents live modestly and have simple tastes. They often work on home improvement and remodeling projects and own garden equipment to maintain their yards. They cook and bake at home. Many households own multiple pets, particularly dogs and cats. Riding lawn mowers and satellite dishes are familiar sights, along with multiple vehicles, including a truck. They go hiking, boating, canoeing, hunting, fishing, horseback riding, and golfing. The older residents focus on their general health care, prescription medications, and financial and retirement-related matters

New Research: 2nd Home Owner Survey of 2008

The University of Massachusetts Donahue Institute conducted a survey of second home owners on Cape Cod during the winter of 2007-2008 on behalf of the Cape Cod Commission, the Cape Cod Economic Development Council and the Cape Cod Regional Chamber of Commerce. The purpose of the survey was to better understand current use of second homes and to estimate the percentage of current second home owners planning to convert their second homes to primary homes in the next fifteen years. The purpose and results of the survey are outlined below.

Current Statistics on Second Homes

- There are just under 50,000 seasonal homes on Cape Cod representing 32% of our housing stock
- The share of seasonal housing varies by sub-region
- 24% on the Upper Cape
- 55% on the Outer Cape
- 64% of the houses in Wellfleet are seasonal while only 13% of the housing in Sandwich are seasonal
- Yet, the town of Dennis has the largest number of second homes on the Cape followed by Falmouth, Yarmouth, & Barnstable

Survey Methodology

- 49,563 Surveys mailed
- 30.9 % Response rate; 1.3% margin of error

Meaning & Significance: These are very strong results for a survey and indicate that the data is very representative of the entire second homeowner population on Cape

Cod. Therefore, the data is a reliable basis for decision making and understanding the Cape's second-home population.

Profile of Second-homes

- 72 % were existing homes when purchased
- 20% are owned by a trust; 12% were inherited or gifted
- 19 years is the average length of ownership
- 80% are single family homes with 2-5 bedrooms
- ½ acre is the median lot size
- 27% overall are not served by public water supply; 80% on the Outer Cape
- 4% are connected to a municipal sewer system
- 35% have no Internet service; 22% use dial-up service

Meaning & Significance: On average, second-homes have been owned for almost two decades and less than a quarter of them where newly built. This suggests that year-round population increases since the late 1980s have been the primary driver behind new home construction on the Cape. It also suggests that second-home owners are vested in their Cape community. Second-homes on average are not on advanced public water and wastewater systems and do not have high-speed Internet services. This suggests that conversion of these properties may well increase the need for better public infrastructure.

Profile of Second-home Owners

- 79% have at least a college education
- 67% have an annual income of over $100,000
- 60 years old is their average age
- 2 adults with no children is their typical household
- 58% are permanent residents of Massachusetts; 51% of these are from Middlesex and Norfolk counties
- 71% are from New England; an additional 17% from the rest of the Northeast

Meaning & Significance: The majority of second-home owners live within driving distance of their vacation property indicating that the Cape's second-home market is primarily regional. Owners are likely to have purchased this property twenty years ago – the age when most would have been in their mid-career with children at home; the current average age of 60 suggests that more recent generations are not purchasing second-home at the same rate as past generations.

Findings by Research Question: The survey was designed around six survey questions pertaining to current use, conversion rates, and the impact of conversions of secondary homes to primary homes. The questions and the findings associated are outlined below:

1. Currently, how are second-homes used?
   - Most intensely in the summer

- 18% of second homeowners report not using their second home in the summer
- 74% of second homeowners report NEVER renting their home

2. Will a significant number of second homes be converted into full time residences in the next 5 years? The next 15 years?
   - 8% of respondents say they plan to convert their second home in the next 5 years
   - 14% say they will convert it in the next 6-15 years
   - 22% say they will convert in the next 15 years
   - The status of 37% of second homes is uncertain

3. Will the rate of conversions differ among the four sub-regions?
   - There are statistically significant differences by sub-regions in relative to conversion rate
   - The Upper Cape has the lowest anticipated conversion rate in the next 15 years at 19.7%; the Lower Cape has the highest at 24.8%

4. Does the conversion of a seasonal home significantly impact the level of usage or just spread it out over the full year?
   - Second home owners planning to convert their second home say they plan to increase the usage of their second home
   - On average though they say approximately the same number of people will use the home for the same number of months
   - This may mean they intend to use the home for more days per month

5. How will changes in use patterns impact local spending patterns and the regional economy?
   - Respondents planning to convert their second home report they will purchase a higher percentage of goods and services locally
   - There may be a large loss of short-term rental space
   - There may be a big increase in educated people looking for employment

6. How will changes in use patterns impact demand for public and human services and infrastructure?
   - There will likely be increased use of water and waste water
   - There will likely be a particularly large increase in demand for internet services

Balanced Economy Benchmarks: Status of the Regional Economy

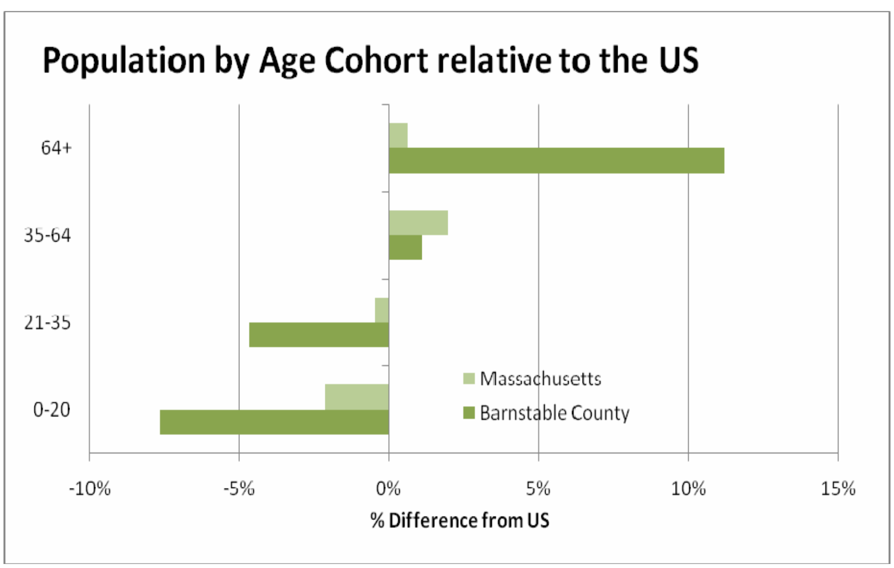
The Commission has been working to develop a set of measures to benchmark the progress of the region's economy and economic wellbeing of its residents. The measures are designed around the four principles of economic development:

- *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.

Thus far measures have been developed that 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. At the same time, regional economies grow by retaining and attracting income to the region through a variety of means including exports of goods & services and similarly import substitution of goods and services, as well as attracting investment to the region and encouraging local ownership of businesses.

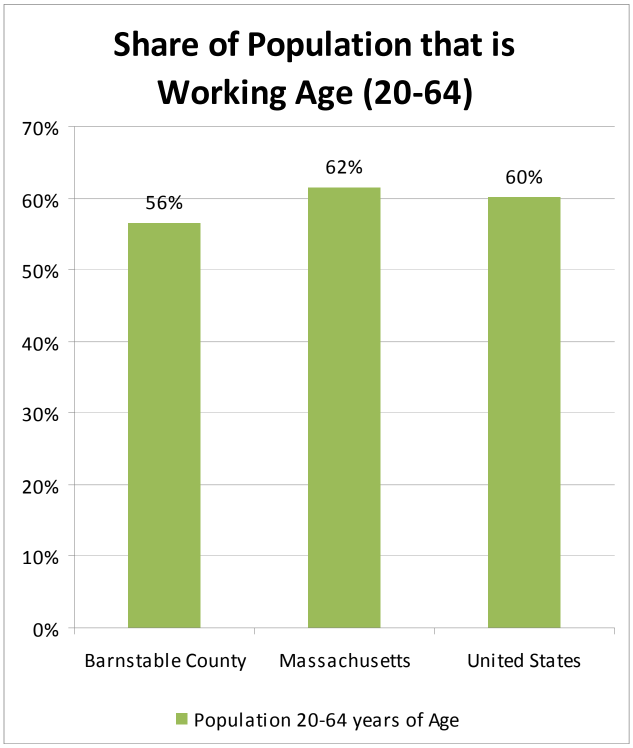
Balanced Economy

Demographic Diversity: Demographic diversity can be measured in a number of ways, the focus here is on age diversity. There has been a concern about "brain-drain" on the Cape over the past several decades particularly as housing and other costs of living on here have risen rapidly. The population estimates for 2008 do indicate that the Cape has a smaller share of its population in the younger age cohorts than the US or the state. The data also show a significantly larger share of the population is retirement age or older.



2008 Estimates	Barnstable County	Barnstable County	Massachusetts	United States
Age Cohort	#	share of Total	share of Total	share of Total
0-20	43,198	20%	25%	27%
21-35	37,599	17%	21%	22%
35-64	87,220	39%	40%	38%
64+	53,032	24%	13%	13%

Source: US Census Bureau, 2008 Population Estimates

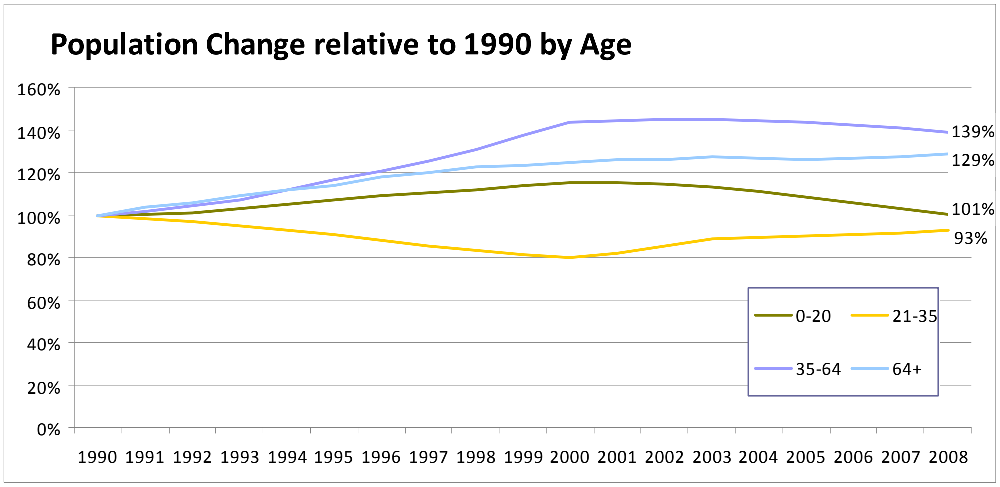


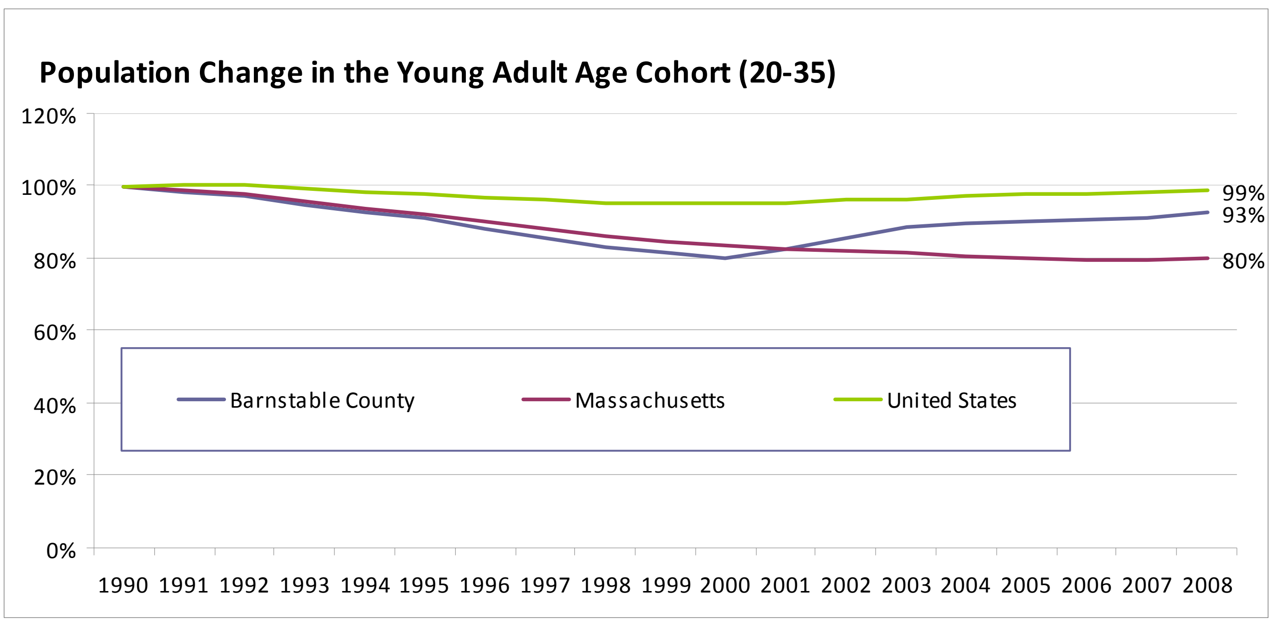
The workforce age population from ages twenty through sixty-four does constitute 56% of the Cape's population. This is a smaller share than in Massachusetts or the US as a whole due to the larger retirement age cohort and smaller school age cohort than is the norm. Yet, when looking at another dataset for measuring unemployment (Local Area Unemployment Survey – LAUS), the workforce equals 55.6% of the population on the Cape but the state workforce equals only 53% and the US only 50.2% of their respective populations. This suggests that almost all the people of working age on the Cape are actively working or looking for work than is the case statewide or in the US as a whole.

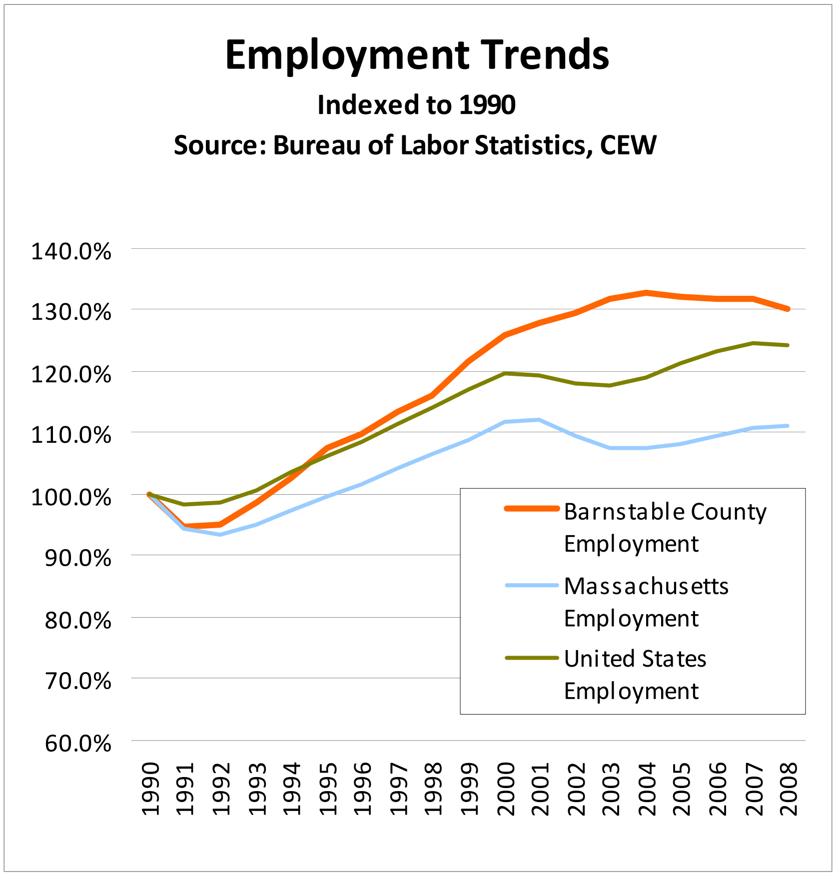
Looking at population growth over time, the later workforce age group (35-64) has grown the fasted, increasing by 39% since 1990. Not surprisingly, the retired population cohort increased as well. Both of these trends are impacted by the aging of the Baby Boom generation. The explanation holds, at least in part, for the apparent loss of the young adult population as well. It is difficult to isolate when the trend is simply reflecting people getting older verses people leaving the region.

1990-2008 Net Population Change by Age Cohort			
Age Cohort	Barnstable County	Massachusetts	United States
0-20	241	80,234	10,722,413
21-35	-2,989	-345,844	-723,528
35-64	24,600	687,329	36,815,588
64+	11,862	53,609	7,622,437

Comparison of the young adult age group by geography shows that the cohort has declined across the US. The rate of loss is slightly more in Barnstable County than the US; the state on the other hand has seen this group decline by a full 20% versus 1% in the US and 8% on the Cape.







Employment Diversity:

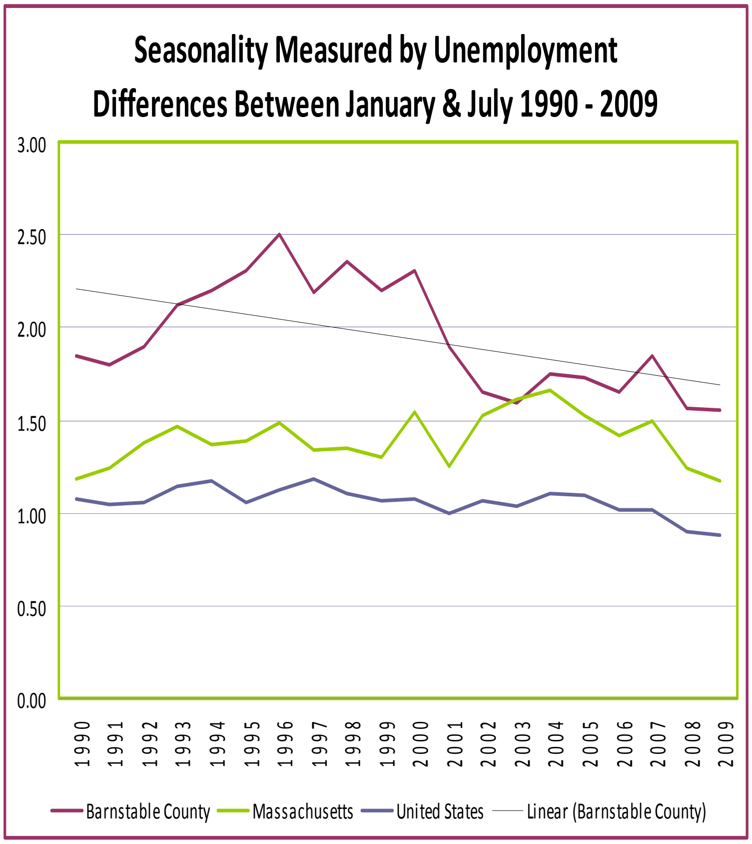
Relative to 1990, employment has grown by over 30%. Employment peaked at 93,198 in 2004. Recent years have seen a decline to 2002 levels as of 2008. Unlike Massachusetts and the US there was not a steep decline in employment from 2001 – 2003.

Unemployment rates increased significantly in 2009 which is yet to be reflected in this dataset; it is fair to assume that like the state and nation, employment on the Cape will see a decline in 2009 and 2010.

	Employment		
YEAR	Barnstable County	Massachusetts	United States
1990	70,230	2,920,678	108,603,565
1991	66,557	2,754,908	106,823,195
1992	66,779	2,728,621	107,321,596
1993	69,414	2,777,257	109,402,016
1994	72,133	2,842,842	112,502,187
1995	75,561	2,914,133	115,414,328
1996	77,060	2,967,120	117,818,714
1997	79,623	3,042,410	121,021,214
1998	81,593	3,110,707	124,077,507
1999	85,407	3,178,183	126,962,861
2000	88,331	3,266,599	129,879,584

	Employment		
YEAR	Barnstable County	Massachusetts	United States
2001	89,761	3,276,224	129,635,800
2002	91,004	3,202,322	128,233,919
2003	92,509	3,141,088	127,795,827
2004	93,198	3,138,738	129,278,176
2005	92,756	3,159,933	131,571,623
2006	92,466	3,194,913	133,833,834
2007	92,642	3,234,357	135,366,106
2008	91,462	3,245,983	134,805,659

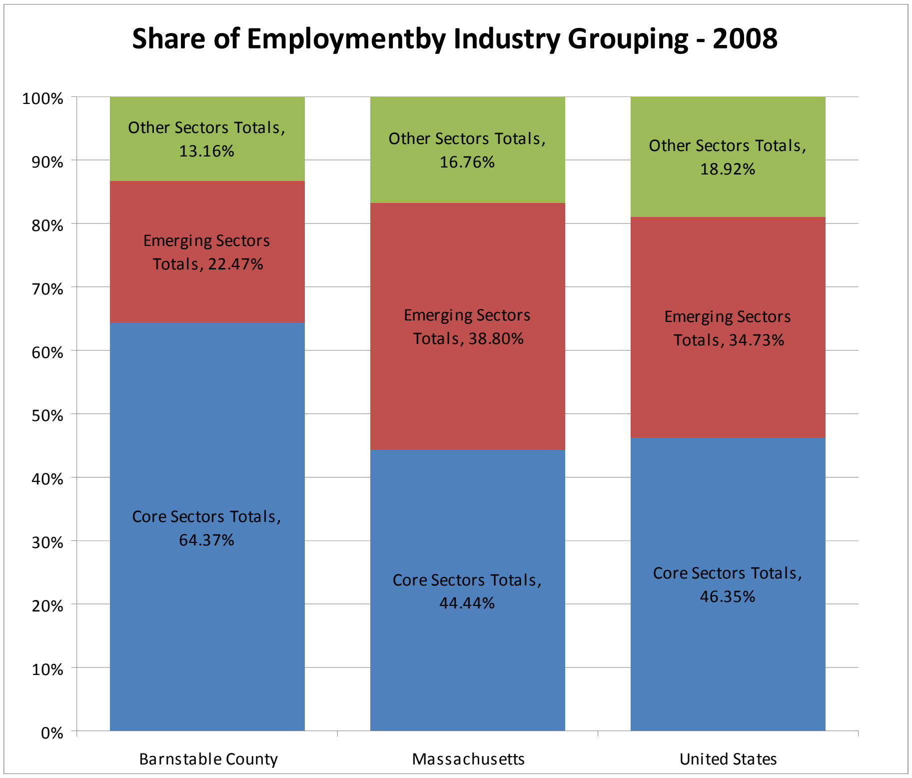
Source: Bureau of Labor Statistics, Covered Employment & Wages (ES202)



Data looking at the difference between winter and summer unemployment indicates that the Cape is becoming less seasonal than in 1990. Seasonal differences are getting much closer to those found in the MA and US. Seasonality seems to have peaked in the mid- 1990s when winter unemployment rates continued to be high due to the national recession but a recovery is seen in summer employment. The jump in unemployment in 2009 is similar in patter to the recession that kicked off the 1990s; time will tell if the recovery of the winter or ear-round economy will again lag the summer.

	Barnstable County			Massachusetts			United States		
Year	January Unemployment Rate	July Unemployment Rate	Ratio	January Unemployment Rate	July Unemployment Rate	Ratio	January Unemployment Rate	July Unemployment Rate	Ratio
1990	9.6	5.2	1.8	5.8	4.9	1.2	6.0	5.6	1.1
1991	14.6	8.1	1.8	8.7	7.0	1.2	7.1	6.8	1.0
1992	15.9	8.4	1.9	9.8	7.1	1.4	8.1	7.7	1.1
1993	15.5	7.3	2.1	9.1	6.2	1.5	8.0	7.0	1.1
1994	14.3	6.5	2.2	7.5	5.5	1.4	7.3	6.2	1.2
1995	12.2	5.3	2.3	6.5	4.7	1.4	6.2	5.9	1.1
1996	11.0	4.4	2.5	5.8	3.9	1.5	6.3	5.6	1.1
1997	10.3	4.7	2.2	5.1	3.8	1.3	5.9	5.0	1.2
1998	9.2	3.9	2.4	4.3	3.2	1.3	5.2	4.7	1.1
1999	7.7	3.5	2.2	3.9	3.0	1.3	4.8	4.5	1.1
2000	6.0	2.6	2.3	3.7	2.4	1.5	4.5	4.2	1.1
2001	5.7	3.0	1.9	3.5	2.8	1.3	4.7	4.7	1.0
2002	6.6	4.0	1.7	5.5	3.6	1.5	6.3	5.9	1.1
2003	7.5	4.7	1.6	6.3	3.9	1.6	6.5	6.3	1.0
2004	7.7	4.4	1.8	6.3	3.8	1.7	6.3	5.7	1.1
2005	7.1	4.1	1.7	5.5	3.6	1.5	5.7	5.2	1.1
2006	7.1	4.3	1.7	5.4	3.8	1.4	5.1	5.0	1.0
2007	7.4	4.0	1.9	5.4	3.6	1.5	5.0	4.9	1.0
2008	7.2	4.6	1.6	5.2	4.2	1.2	5.4	6.0	0.9
2009	11.5	7.4	1.6	8.1	6.9	1.2	8.5	9.7	0.9

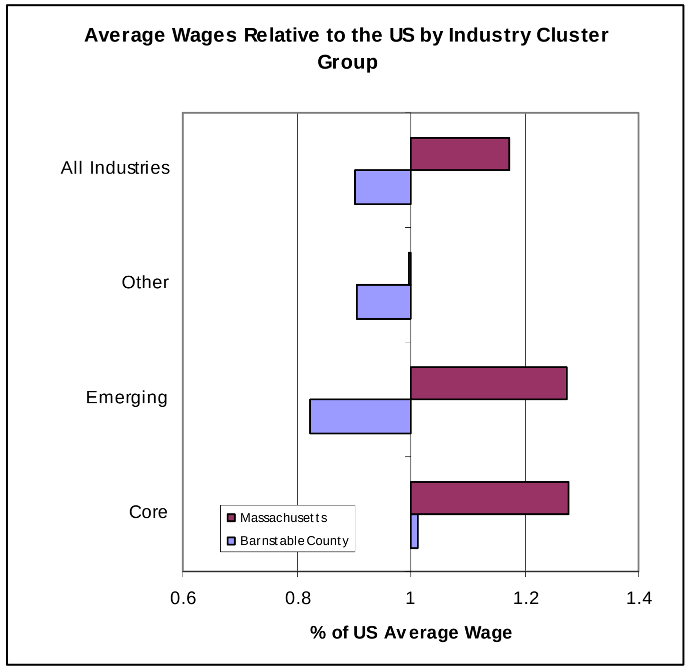
Source: US Bureau of Labor Statistics, Local Area Unemployment Survey (LAUS)



The Cape economy falls into three industry clusters: core, emerging, and other. The core industries include fishing, construction, real estate, retail trade, accommodations & food service, and health care. As a tourism destination many of these can actually 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.

Industry Clusters	Employment by Industry Sector	Barnstable County	Massachusetts	United States
Core	Accommodation and Food Services	14,289	256,893	11,491,913
	Agriculture, Forestry, Fishing and Hunting	221	6,497	1,175,975
	Construction	5,994	144,057	7,315,194
	Health Care and Social Assistance	14,939	500,480	17,433,674
	Real Estate and Rental and Leasing	1,523	42,445	2,157,367
	Retail Trade	15,770	348,093	15,374,114
Core Total		52,734	1,298,465	54,948,238
Emerging	Arts, Entertainment, and Recreation	2,613	49,852	2,380,659
	Educational Services	6,402	320,091	12,103,005
	Finance and Insurance	2,325	179,387	5,887,223
	Information	1,791	95,162	3,139,585
	Professional, Scientific, and Technical Services	4,438	260,998	7,918,296
Emerging Total		17,568	905,490	31,428,768
Other	Administrative and Support and Waste Management and Remediation Services	3,518	167,583	8,079,180
	Mining, Quarrying, and Oil and Gas Extraction	66	1,263	713,734
	Other Services (except Public Administration)	3,929	129,433	4,541,233
	Utilities	468	13,594	816,561
	Wholesale Trade	1,559	136,434	5,955,340
Other Total		9,540	448,306	20,106,047
Grand Total		79,841	2,652,260	106,483,052

Source: US Bureau of Labor Statistics, Covered Employment & Wages (ES202), 2008



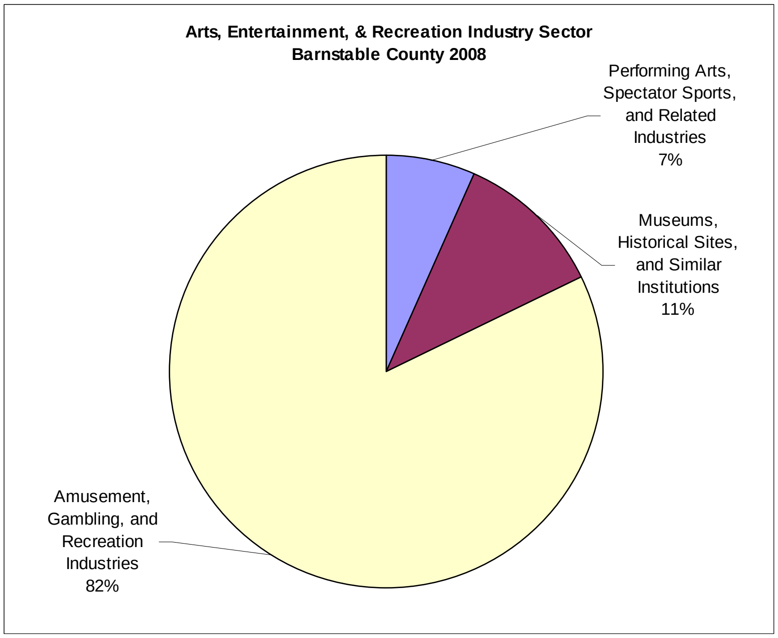
Emerging industries include Arts, Entertainment, and Recreation, Educational Services, Finance and Insurance, Information, and Professional, Scientific, and Technical Services. These are the industries the Cape would like to see grow in the future to better balance the tourism economy and provide more 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 ($49,578 for Barnstable County)is signficantly higher than in the core cluster ($34,377) which is relativly well paid when compared to the US but less so when compared to the state as a whole. Even so, emerging industry wages seriously lag those found statewide and in the US.

Industry Cluster	Annual Wage by Industry Sector	Barnstable County	Massachusetts	United States
Core	Accommodation and Food Services	20,371	19,293	16,753
	Agriculture, Forestry, Fishing and Hunting	32,658	45,736	26,104
	Construction	48,940	61,277	48,874
	Health Care and Social Assistance	45,259	49,827	42,716
	Real Estate and Rental and Leasing	31,290	56,452	43,190
	Retail Trade	27,743	27,701	26,178
Core Total		34,377	43,381	33,969
Emerging	Arts, Entertainment, and Recreation	28,327	34,997	31,416
	Educational Services	44,179	50,534	41,525
	Finance and Insurance	66,688	118,986	85,188
	Information	46,545	82,712	68,825
	Professional, Scientific, and Technical Services	62,149	96,730	74,293
Emerging Total		49,578	76,792	60,249
Other	Administrative and Support and Waste Management and Remediation Services	34,153	38,648	32,188
	Mining, Quarrying, and Oil and Gas Extraction	54,361	51,838	87,142
	Other Services (except Public Administration)	28,924	28,242	28,894
	Utilities	91,454	89,275	76,250
	Wholesale Trade	50,673	76,971	61,843
Other Total		51,913	56,995	57,263
Grand Total		44,607	58,076	49,461

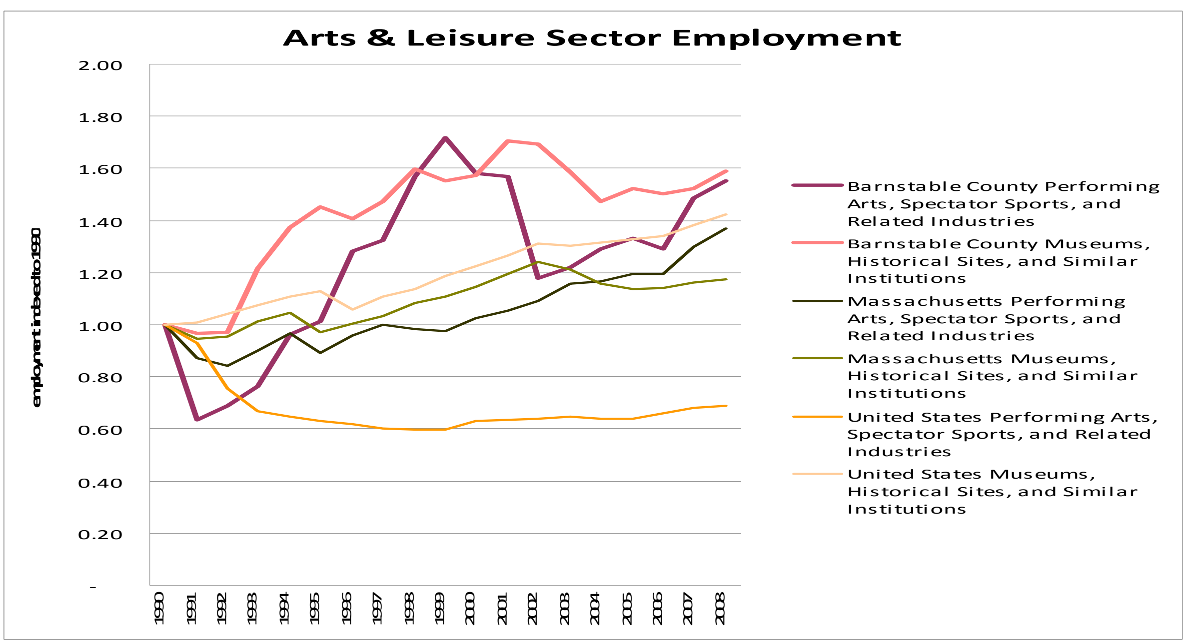
Source: US Bureau of Labor Statistics, Covered Employment & Wages (ES202), 2008

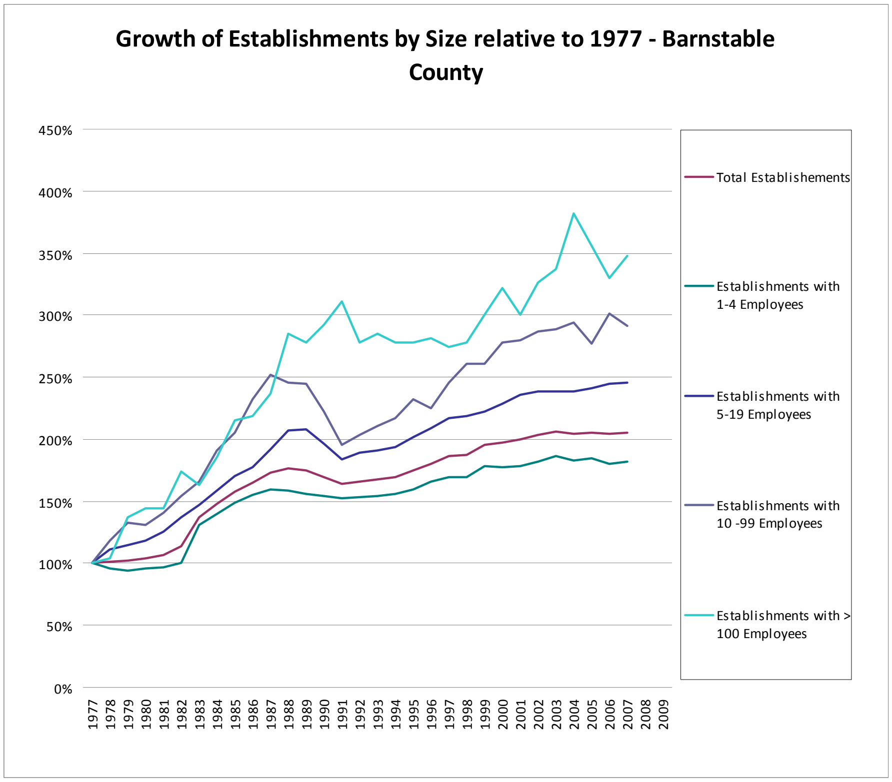
Of unique importance to Cape Cod, given its history and reliance on tourism, is the arts, culture and recreation sector. As employers this sector is relatively small and is dominated by the recreation sub-sector. The performing arts sub-sector is generally under-counted in this dataset of employers since many working in the industry are sole proprietors.



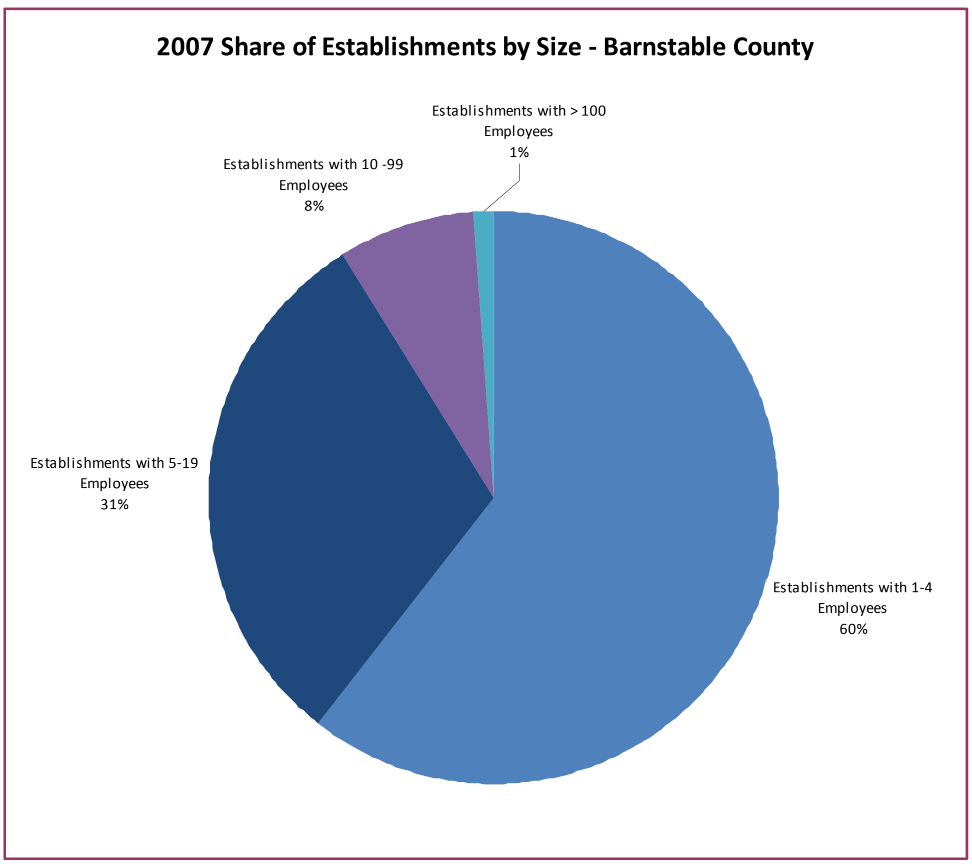
Employment growth trends in this sector do show strong growth in the performing arts sub-sector and in employment by museums in Barnstable County since 1990. This is particularly good news when compared to national growth trends showing losses in employment in the performing arts and related sectors.

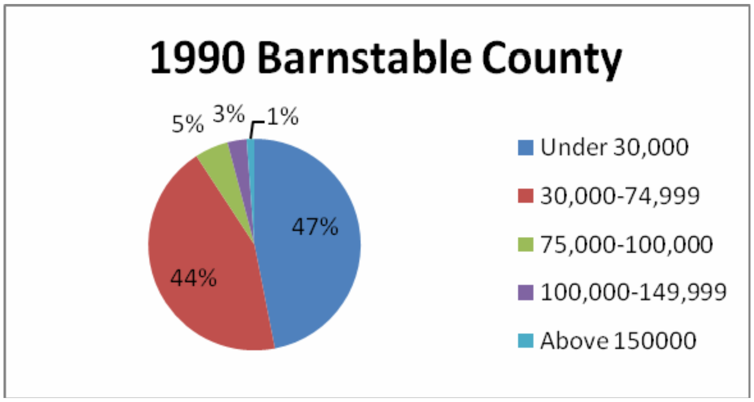
YEAR	NAICS	Description	Employment	Percentage
2008	71	Arts, Entertainment, and Recreation	2612.66	100.0
2008	711	Performing Arts, Spectator Sports, and Related Industries	176.5	6.8
2008	712	Museums, Historical Sites, and Similar Institutions	289.5	11.1
2008	713	Amusement, Gambling, and Recreation Industries	2146.66	82.2

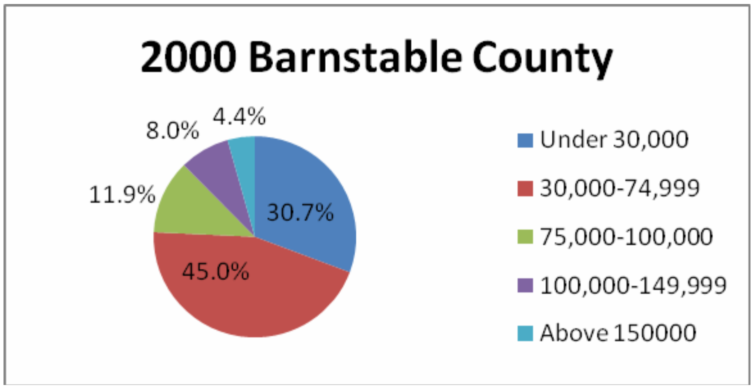




Business Diversity: Cape Cod has long been home to many small locally owned business enterprises. Sixty percent of the establishments on the Cape in 2007 employed between one and four people. Large enterprises of over one hundred employees have been relatively small in number yet this group of enterprises has increased at the swiftest rate over the past several decades; from 27 in 1977 to 94 in 2008.



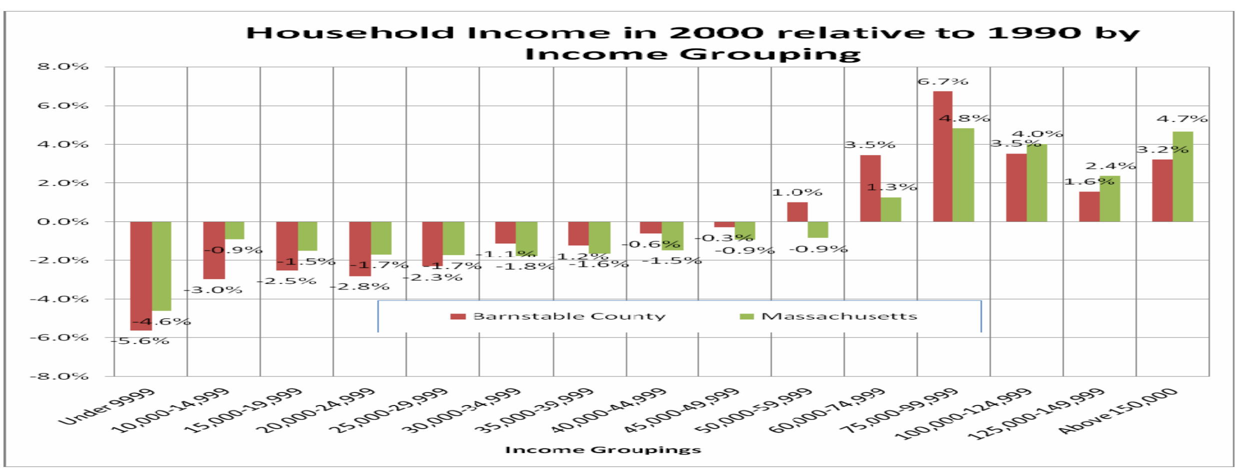




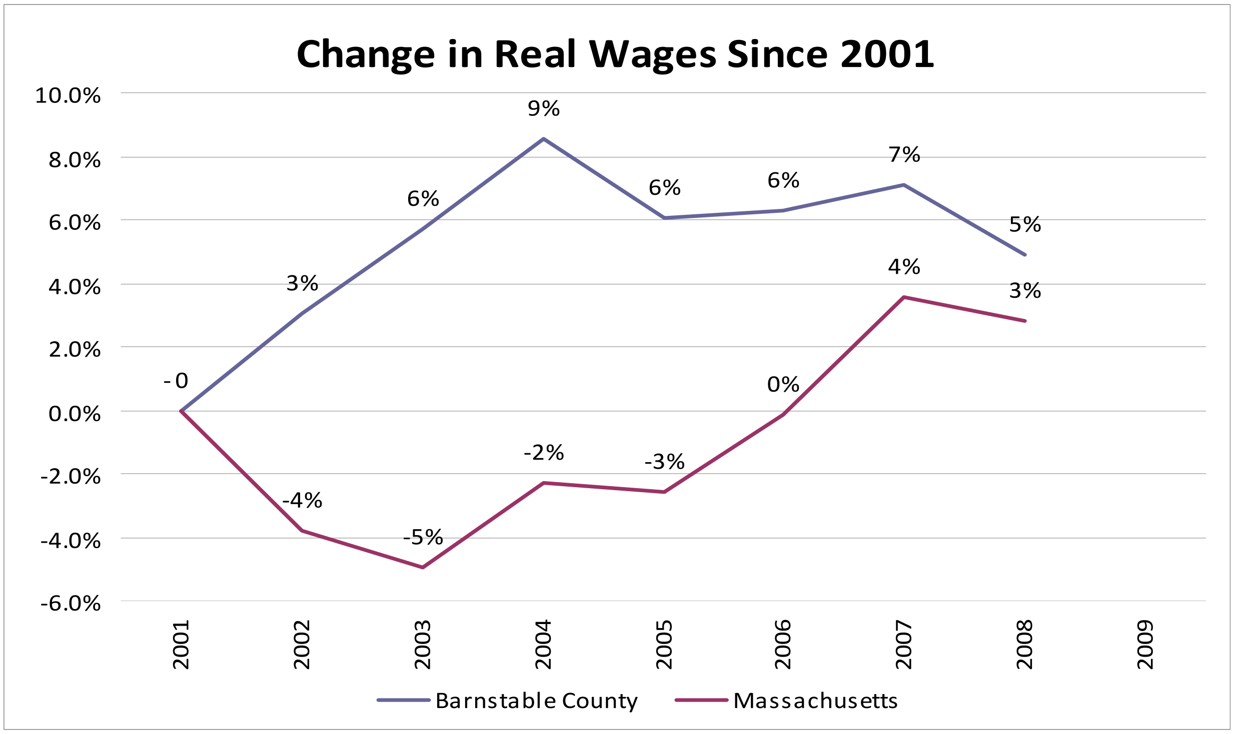
Income Diversity: Without controlling for inflation, there appears to be a shift towards higher incomes groups on the Cape between 1990 and 2000. In 1990 only 8% of all households earned $75,000 or above; by 2000 this percentage had grown to 24% of all households. It is difficult to determine how much 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.

These changes in distribution are also reflected in the data for Massachusetts as a whole.

Households by Income Groupings	1990		2000	
	Barnstable County	Massachusetts	Barnstable County	Massachusetts
Total	77,675	2,244,406	94,845	2,444,588
Under 30,000	36,434	900,751	29,109	725,620
30,000-74,999	34,054	1,015,540	42,720	973,793
75,000-100,000	3,978	178,806	11,243	312,741
100,000-149,999	2,282	102,348	7,605	267,300
Above 150,000	927	46,961	4,168	165,134



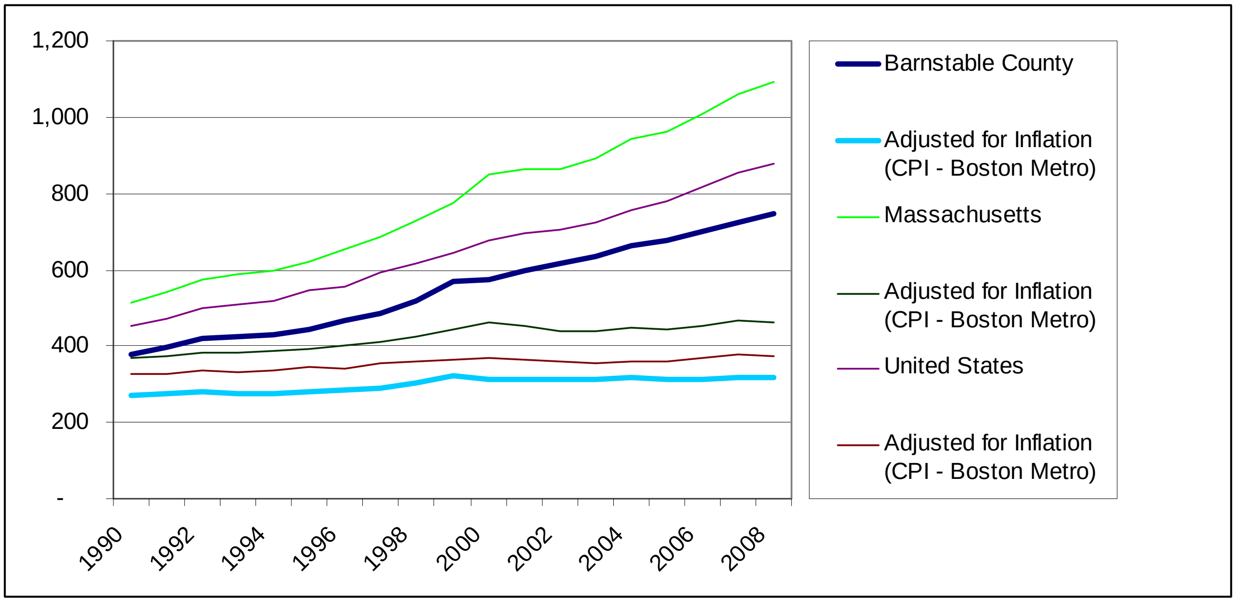
Regional Income Growth



Wage Income: Wages on Cape Cod have traditionally been much lower than off-Cape. It is particularly important, therefore that the current wage growth trends continue. It is likely that gains will be somewhat ameliorated due to the current recession, but hopefully long term trends will still show positive growth, and gains will be seen again when the economy rebounds. It is interesting that while the region's wages have grown, real wages in the state showed declines between 2001 and 2007 when some growth was realized.

	Barnstable County				Massachusetts			
Year	Total Wages (in thousands)	Adjusted to XXXX dollars	Net Growth/Loss in Total Real Wages since 2001	% change in Real Wages since 2001	Total Wages (in thousands)	Adjusted to XXXX dollars	Net Growth/Loss in Total Real Wages since 2001	% change in Real Wages since 2001
2001	2,784,842	1,572,469		-	147,348,234	83,200,584		0
2002	2,914,665	1,620,158	47,690	3%	143,957,008	80,020,571	(3,180,012)	-4%
2003	3,059,203	1,662,610	90,142	6%	145,503,514	79,077,997	(4,122,587)	-5%
2004	3,224,499	1,706,987	134,519	9%	153,534,774	81,278,335	(1,922,249)	-2%
2005	3,257,877	1,668,140	95,671	6%	158,296,563	81,053,028	(2,147,556)	-3%
2006	3,369,133	1,671,197	98,728	6%	167,524,705	83,097,572	(103,012)	0%
2007	3,491,784	1,684,070	111,601	7%	178,679,510	86,176,226	2,975,642	4%
2008	3,552,312	1,649,913	77,444	5%	184,196,350	85,552,152	2,351,568	3%

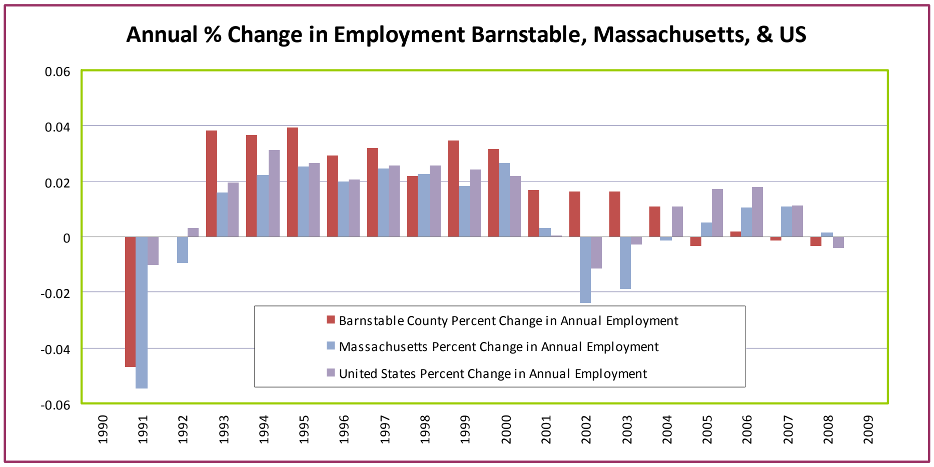
Source: US Bureau of Labor Statistics, Covered Employment & Wages (CEW) Dataset (aka ES202)



Adjusting for inflation, wages on the Cape have grown by 16.3% while wages in the state increased by 25.2%; the US wages rose by 14% using the same CPI to adjust to real wages. Cape employers still pay on average a fraction of the US average and much less than the state average. This could be due to the industry mix on Cape Cod (a comparison of wages by industry sector could clarify this), competition for workers, and/or due to the seasonal nature of the Cape's economy – employers and workforce alike.

Average Weekly Wage						
Year	Barnstable County		Massachusetts		United States	
	Actual	*Adjusted for Inflation (CPI - Boston Metro)*	Actual	*Adjusted for Inflation (CPI - Boston Metro)*	Actual	*Adjusted for Inflation (CPI - Boston Metro)*
1990	379	*273*	514	*370*	454	*327*
1991	398	*274*	540	*372*	473	*326*
1992	418	*281*	572	*385*	499	*336*
1993	423	*277*	586	*383*	508	*332*
1994	430	*278*	597	*385*	519	*335*
1995	445	*281*	622	*392*	545	*344*
1996	465	*285*	654	*400*	557	*341*
1997	485	*289*	688	*410*	594	*354*
1998	520	*303*	727	*423*	615	*358*
1999	571	*324*	777	*441*	644	*366*
2000	572	*312*	852	*464*	679	*370*
2001	597	*312*	865	*452*	697	*364*
2002	616	*313*	864	*440*	707	*360*
2003	636	*312*	891	*437*	726	*356*
2004	665	*317*	941	*449*	757	*361*
2005	675	*312*	963	*445*	782	*361*
2006	701	*314*	1,008	*452*	818	*367*
2007	725	*319*	1,062	*467*	855	*376*
2008	747	*317*	1,091	*464*	876	*372*

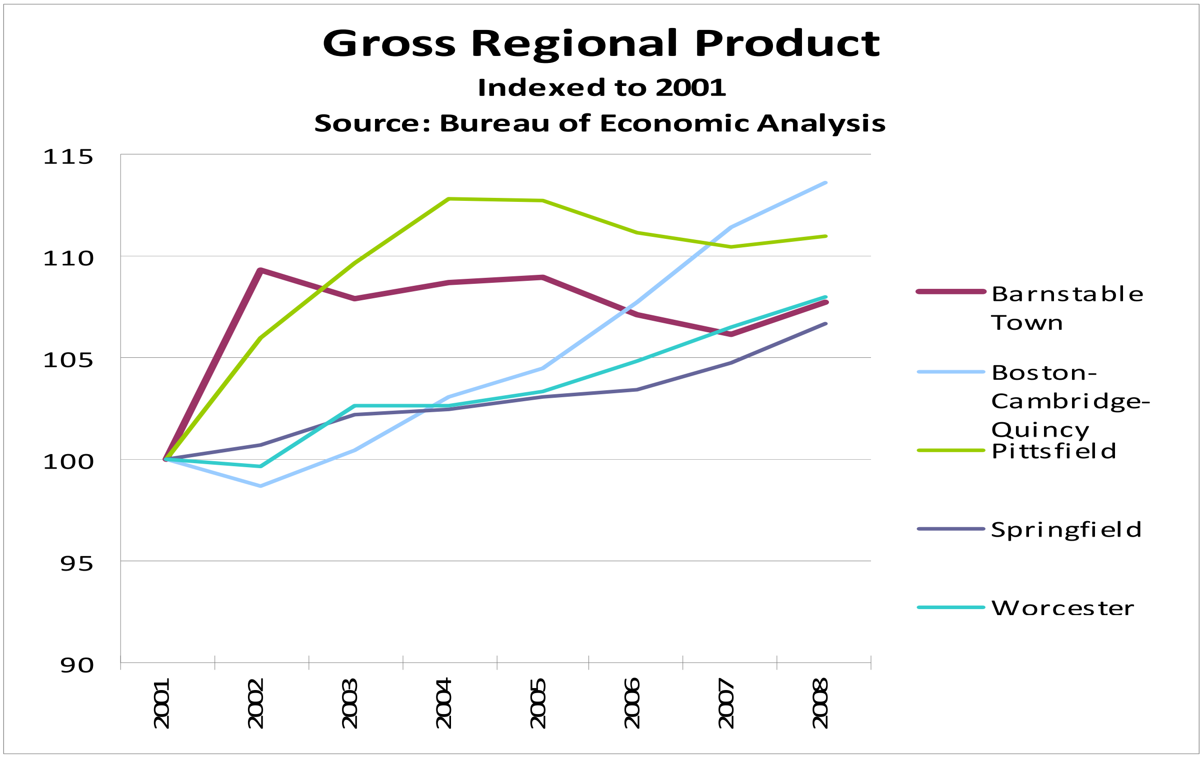
Source: US Bureau of Labor Statistics, Local Area Unemployment Statistics



__Net Job Creation:__ Job growth on Cape Cod has been very strong throughout the 1990s and into the first years of this decade. Since 1995 there has been some fluctuation each year keeping employment essentially flat at approximately 101,000 jobs. The data shows trends on the Cape as diverging from that of the nation and the state in the current decade. Since 1990, approximately 24,000 jobs have been created in Barnstable County.

	Barnstable County			Massachusetts			United States		
Year	Total Annual Employment (in 1,000)	Net change in Annual Employment (in 1,000)	Percent Change in Annual Employment	Total Annual Employment (in 1,000)	Net change in Annual Employment (in 1,000)	Percent Change in Annual Employment	Total Annual Employment (in 1,000)	Net change in Annual Employment (in 1,000)	Percent Change in Annual Employ ment
1990	77	-	0	2,988		-	109,487	-	0.0%
1991	74	(4)	-4.7%	2,824	(164)	-5.5%	108,375	(1,112)	-1.0%
1992	74	-	0.0%	2,798	(26)	-0.9%	108,726	351	0.3%
1993	76	3	3.8%	2,843	45	1.6%	110,844	2,118	1.9%
1994	79	3	3.7%	2,907	64	2.2%	114,291	3,447	3.1%
1995	82	3	3.9%	2,980	73	2.5%	117,298	3,007	2.6%
1996	85	2	2.9%	3,039	59	2.0%	119,708	2,410	2.1%
1997	87	3	3.2%	3,114	75	2.5%	122,776	3,068	2.6%
1998	89	2	2.2%	3,184	70	2.3%	125,930	3,154	2.6%
1999	92	3	3.5%	3,243	59	1.8%	128,993	3,063	2.4%
2000	95	3	3.1%	3,329	87	2.7%	131,785	2,792	2.2%
2001	97	2	1.7%	3,339	10	0.3%	131,826	41	0.0%
2002	98	2	1.7%	3,259	(80)	-2.4%	130,341	(1,485)	-1.1%
2003	100	2	1.6%	3,198	(61)	-1.9%	129,999	(342)	-0.3%
2004	101	1	1.1%	3,195	(4)	-0.1%	131,435	1,436	1.1%
2005	101	(0)	-0.3%	3,212	17	0.5%	133,703	2,268	1.7%
2006	101	0	0.2%	3,246	34	1.1%	136,086	2,383	1.8%
2007	101	(0)	-0.1%	3,281	35	1.1%	137,598	1,512	1.1%
2008	101	(0)	-0.3%	3,285	5	0.1%	137,066	(532)	-0.4%

Source: US Bureau of Labor Statistics, Current Employment Statistics (CES) Dataset

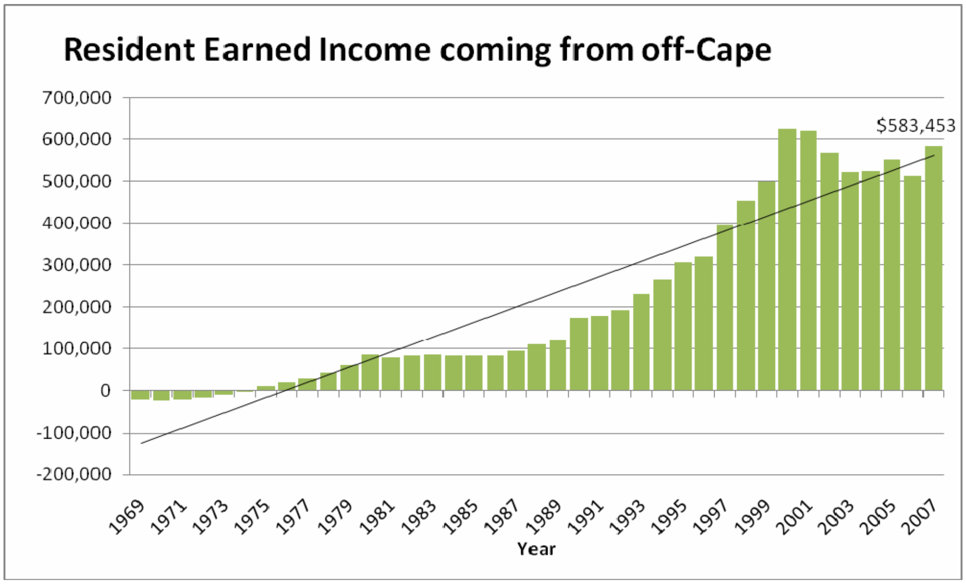


<u>Gross Regional Product:</u> The output or Gross Regional Product for the Cape Cod metro area has remained relatively steady since 2002 and is third larger than its comparable tourism centered region: the Pittsfield metro area. Pittsfield has grown at a faster rate in the past seven years but from a lower starting point. Interestingly, both areas' product increased significantly between 2001 and 2002, while it did not do so in the other areas of the state. The Cape contributes 2% of the total regional product of all these metro areas combined; 83% comes from the Boston metro area, followed distantly by Worchester at 8%. On a per capita basis, the Cape contributes more per resident than Springfield or Worchester metro areas. Pittsfield exceeds the Cape on a per capita basis probably due to its history of manufacturing as well as tourism generating income.

Gross Regional Product (millions of chained 2001 dollars) – Massachusetts Metro Areas					
Year	Barnstable Town	Boston-Cambridge-Quincy	Pittsfield	Springfield	Worcester
2001	6,617	230,658	4,095	17,281	22,547
2002	7,233	227,575	4,338	17,398	22,472
2003	7,139	231,575	4,488	17,657	23,147
2004	7,190	237,822	4,618	17,700	23,135
2005	7,208	240,878	4,615	17,819	23,304
2006	7,086	248,511	4,552	17,878	23,644
2007	7,022	256,913	4,523	18,097	24,019
2008	7,129	261,945	4,544	18,434	24,344

Source: US Bureau of Economic Analysis

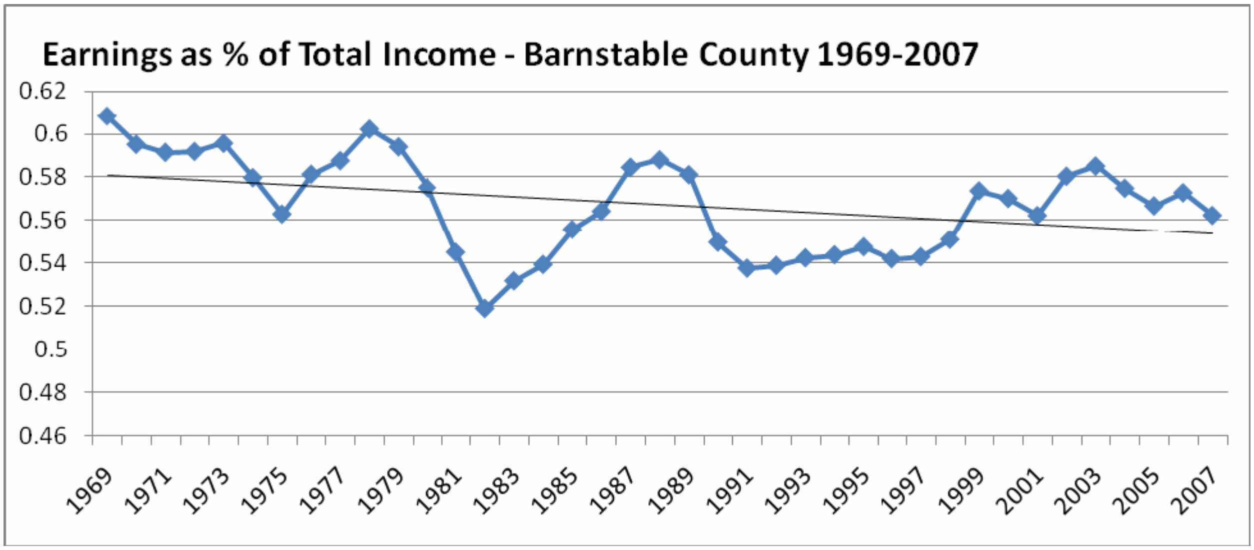
<u>*Commuter Income*</u>: Residents working off-Cape bring income into the region. Prior to the mid-1970s more was earned on Cape than residents were earning off-Cape. This trend has dramatically reversed since that time. The change coincides with the large increase in year-round population, many members of which were clearly commuting to jobs off-Cape. While commuting does draw income to the region, increasing employment opportunities for these commuters within the region should be a goal. This data indicates it is a goal that could be reached.



Year	Earnings by place of work	Equals: Net earnings by place of residence	$ from Off-Cape
1969	265,720	245,685	(20,035)
1970	290,417	267,805	(22,612)
1971	326,821	307,247	(19,574)
1972	366,768	351,607	(15,161)
1973	409,212	399,044	(10,168)
1974	429,673	429,103	(570)
1975	457,649	468,874	11,225
1976	531,235	550,504	19,269
1977	599,044	629,408	30,364
1978	688,417	731,801	43,384
1979	769,348	829,835	60,487
1980	845,512	930,905	85,393
1981	934,731	1,014,629	79,898
1982	1,001,434	1,084,887	83,453
1983	1,147,297	1,234,047	86,750
1984	1,355,556	1,439,337	83,781
1985	1,561,061	1,644,552	83,491
1986	1,755,491	1,838,681	83,190
1987	2,030,328	2,126,616	96,288

Year	Earnings by place of work	Equals: Net earnings by place of residence	$ from Off-Cape
1988	2,208,515	2,319,882	111,367
1989	2,221,632	2,345,241	123,609
1990	2,206,943	2,381,779	174,836
1991	2,183,737	2,363,881	180,144
1992	2,344,094	2,535,884	191,790
1993	2,465,991	2,697,110	231,119
1994	2,613,415	2,878,688	265,273
1995	2,759,426	3,064,942	305,516
1996	2,933,367	3,254,161	320,794
1997	3,086,312	3,480,146	393,834
1998	3,438,360	3,892,609	454,249
1999	3,831,536	4,331,214	499,678
2000	3,925,892	4,549,148	623,256
2001	4,182,293	4,801,657	619,364
2002	4,428,848	4,996,993	568,145
2003	4,629,875	5,151,061	521,186
2004	4,952,102	5,477,219	525,117
2005	5,085,450	5,637,624	552,174
2006	5,252,298	5,765,145	512,847
2007	5,362,438	5,945,891	583,453

Source: US Bureau of Economic Analysis



Barnstable County	Earnings as % of Income
1969	0.608411
1970	0.595143
1971	0.591434
1972	0.591847
1973	0.59562
1974	0.579704
1975	0.562821
1976	0.581277
1977	0.58758
1978	0.602211
1979	0.593976
1980	0.575097
1981	0.544919

Barnstable County	Earnings as % of Income
1982	0.518852
1983	0.531594
1984	0.539197
1985	0.555603
1986	0.564104
1987	0.584491
1988	0.587974
1989	0.581091
1990	0.549568
1991	0.537458
1992	0.538753
1993	0.542278
1994	0.543697

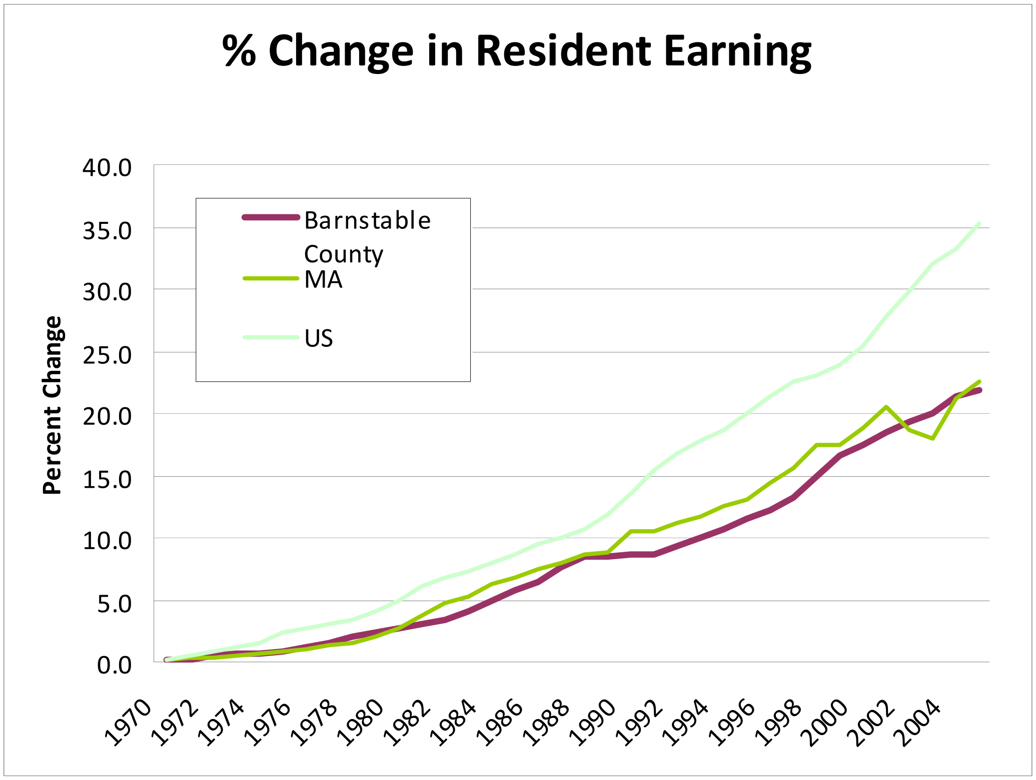
Barnstable County	Earnings as % of Income
1995	0.547442
1996	0.541862
1997	0.542787
1998	0.550828
1999	0.573577
2000	0.570079
2001	0.562122
2002	0.580382
2003	0.585067
2004	0.574752
2005	0.566637
2006	0.572688
2007	0.56223

Source: US Bureau of Economic Analysis

Sources of Income: Income comes from three sources: earnings from work, government transfer payments (such as social security and welfare payments), and dividends interest & rent. As the Cape has become popular as a retirement destination the share of total income on the Cape originating from transfer payments and dividends has increased. The share derived from earnings for work has, in turn, declined from 60% of total income in 1969 to 56% in 2007.

Year	Net earnings by place of residence	Plus: Dividends, interest, and rent	Plus: transfer payments	Equals: Total Income for Barnstable Co.
1969	245,685	112,351	45,778	403,814
2007	5,945,891	2,765,882	1,863,781	10,575,554

Source: US Bureau of Economic Analysis



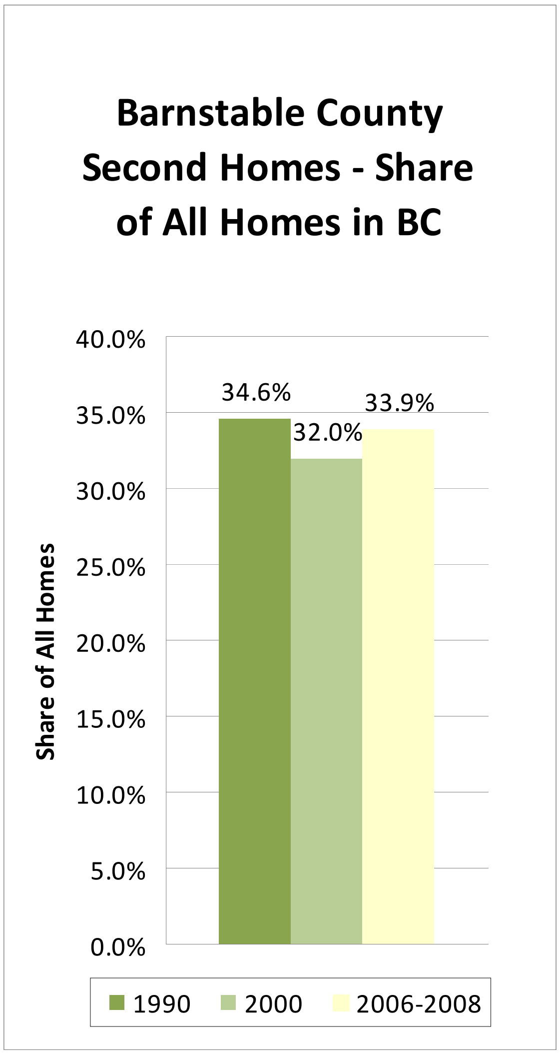
Source: US Bureau of Economic Analysis

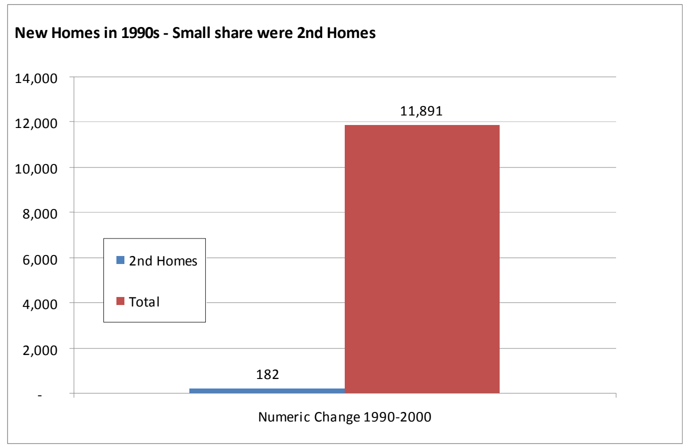
Earnings, while a decreasing share of total income, have increased over time at a rate comparable to the state; both have grown more slowly than the nation as a whole. Given data on employment and wages, the increases are likely due to both job creation and wage increases, all good trends for the region.

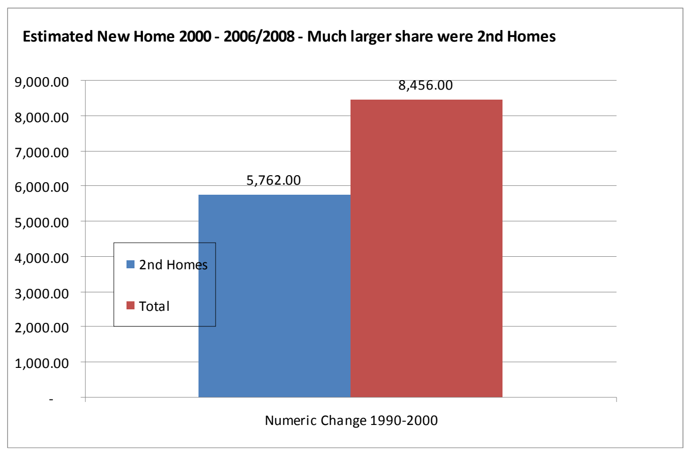
Seasonal Resident Population: Seasonal residents earn their income off-Cape but come for the summer and weekends; their spending contributes to the overall size of the regional economy – they are, like tourists, in essence an export drawing new money to the region.

Barnstable County Housing					
Year	**Data Source**	**Total**	**Year-round Houses**	**2nd Homes**	**Share of Total Homes**
1990	Census	135192	88,358.00	46834	34.6%
2000	Census	147083	100,067.00	47016	32.0%
# change		11,891	11,709.00	182	
% chg		8.8%	13.3%	0.4%	
2006-2008	ACS	155,539	102,761	52,778	33.9%
# change		8,456.00	2,694.00	5,762.00	
% chg		5.7%	2.7%	12.3%	

Decennial Census data shows 2nd homes making up approximately a third of all the homes on Cape Cod; in Massachusetts as a whole they make up just under 4%. During the 1990's, however, there were far more year-round houses added to the pool than second homes. A stark reversal of this trend appears to have occurred during the housing boom of their early 2000s according to American Community Survey data.







Source: US Census Bureau

CHAPTER 4: CEDS ACTION PLAN: YEAR 1 EVALUATION & YEAR 2 PLAN

The CEDS 5-Year Plan included a detailed CEDS action plan establishing a roadmap for economic development on Cape Cod. The CEDS action plan was centered around a set of sixteen regional priority projects intended to address infrastructure and other areas of weakness in the regional economy. It also outlined the ongoing economic development activities in the region, including technical assistance programs and major planning initiatives with some information on local capital projects. The 5-year Plan also outlined a detailed work plan for Year 1 of the CEDS implementation phase. This chapter focuses on these elements of the overall action plan designated for implementation by the Cape Cod Commission in Year 1. The final section of this chapter addresses performance relative to the set of measures identified in the 5-year Update for evaluating the work of the Cape Cod Commission and its partners relative to implementing the Year 1 work plan.

The next chapter will focus on evaluating implementation of the 16 regional priority projects by all economic development stakeholders.

Evaluating the Year 1 Action Plan

Successful implementation of the CEDS depends on continued leadership by Barnstable County. The significant investment by the EDC outlined in Chapter 1 has enabled the Commission to staff CEDS implementation effort. The CEDS provided a roadmap for the Commission in its effort to see the CEDS put into action. The plan is made up of the following action areas:

- Economic Development Planning
- Research
- Public Outreach
- Data Dissemination
- Regional Priority Projects – as project lead and as partner agency
- Direct Technical Assistance to Town Economic Centers

The following table outlines the status of each task within the Year 1 plan for implementation efforts by the Cape Cod Commission in partnership with the CEDS Strategy Committee/Cape Cod EDC. Progress has been made on all fronts with one exception due to lack of necessary funding. Based on our work to date, another table follows this one, outlining our goals and tasks for implementation Year 2.

Cape Cod Commission / Barnstable County Action Plan					
Action	Year 1	Complete	In Progress	Not Started	Notes/ Recommendation
Economic Development Planning	•Apply for EDA Planning Grant	✓			Pending approval from EDA; Resubmit if not awarded
	•Obtain EDD status		✓		Multi-year process; place priority on this in Year 2
	•Design CEDS evaluation/annual review planning process and implement	✓			Use lessons learned from Year 1 to design Year 2 evaluation
	•Complete CEDS Annual Report	✓			
Research	•2 white papers (Myth or Fact)	•Arts Guide •Casino Impacts	✓		Work with EDC to identify pertinent topics during Yr.2
	•Further analysis of 2nd home survey results		✓		Determine specific research questions in discussions with Cape Cod Chamber and the EDC
	•Survey residents			✓	Did not have the funding to complete this survey
Outreach	•2nd-home Survey Workshops	✓			Very successful and well attended; recommend similar events for disseminating research
	•CEDS Implementation Kick-off	✓			Should do more of a workshop in future years since implementation will be further along
	•STATS CapeCod Launch		✓		Did present to EDC but public launch delayed due to staffing issues; new goal is Fall of Year 2
	•White Paper Presentations	✓			Information from papers incorporated in to Executive Director presentations; expand to rest of staff in Year 2
	•Inclusion of local economic development committees and EDICs into the CEDS process	✓			Invited to May CEDS Summit; Establish a more formal partnership in Yr. 2
	•CEDS progress reports	✓ EDC			Expand audience

Cape Cod Commission / Barnstable County Action Plan					
Action	Year 1	Complete	In Progress	Not Started	Notes/ Recommendation
Data Dissemination	•STATS CapeCod Resources Sections	✓			On-going project
	•Balanced Economy Benchmarks		✓		On-going project – continue to develop databases and presentation of the data on the web
	•Create Dynamic USA Town Profiles		✓		Template completed; pilot testing underway
	•Create in-house databases for local primary and secondary data		✓		Shift to long-term goal: standardization is major issue
Regional Priority Projects – Lead	•Scope Coastal Use Templates; establish planning team & structure	✓			More progress made here than originally planned; Implementation Plan completed and research underway; Phase 1 should be completed by December 2010 and Phase 2 outlined in second half of Yr. 2
	•Scope Redevelopment Authority Feasibility Study, complete case study research	✓			Implementation Plan completed; Research and Feasibility Analysis to be completed by Dec. 2010
	•Development in Economic Centers Cost Analysis		✓		Implementation plan drafted in part; continue in Year 2
Regional Priority Projects – Partner	•Help obtain funding for Open Cape, Renewable Energy Generation Program (Bio-fuels pilot project); Fisheries Trust, Community Green Enterprise Center, and Wastewater Infra.	✓	✓		Results of proposals submitted: • Open Cape Won $30M from USDOC; $8M from MA; $2M private capital • Bio-Fuel Lost bid for USDOE Funding; proceeding in phases; partnership with WHOI • Fisheries Trust proposal to USDOC-EDA Pending Proposals that should be submitted in Year 2: • Cmty Green Enterprise Ctr • Wastewater Infrastructure- Parker's River Flushing Study

Cape Cod Commission / Barnstable County Action Plan					
Action	Year 1	Complete	In Progress	Not Started	Notes/ Recommendation
	• Collaborate in completion of the other regional priority projects		✓		ED staff played central role in development of project teams and implementation plans for the following: • Buy Local Infrastructure • Entrepreneurship Training • Renewable Energy Technology & Training
Direct Technical Assistance to Towns/Economic Centers	• Identify development and redevelopment impediments and opportunities in areas designated for growth on the Regional Land Use Vision Map		✓		The first intensive technical assistance engagement was with the town of Yarmouth looking at their Rt. 28 economic centers proximate to the Parker River. A land use and business analysis was completed and a set of recommendations for streetscape improvements, re-zoning and re-use of key properties to stimulate balanced and sustainable economic development in the area in progress

Year 2 Action Plan

The second year of CEDS implementation will focus on the same six action areas:

- Economic Development Planning
- Research
- Public Outreach
- Data Dissemination
- Regional Priority Projects – as project lead and as partner agency
- Direct Technical Assistance to Town Economic Centers

However, in developing the plan of work for Year 2, the EDC identified several priorities within the action areas. The priorities for Year 2 are:

- Economic Development District - applying for status
- STATSCapeCod – continued development & official launch
- Business Survey – design, issue, analysis, and outreach

- Redevelopment Authority Feasibility Study (one of the regional priority projects for which the Commission is acting as lead agency) – complete study, outreach, identification of next steps
- RESET Technical Assistance to Sandwich

The full plan for CEDS implementation during year 2 is outlined in the following table. The table is organized by action area and specific tasks therein. The staff person responsible and the duration of the tasks are also included.

Cape Cod Commission / Barnstable County Implementation Plan Year 2					
Action	Year 2	Lead	Start Month	End Month	Comments
Economic Development Planning	•Apply for EDD Status	Leslie R./ Dan D.	Ongoing	Ongoing	High Priority
	•Update ED Section of the Regional Policy Plan	Leslie R.	January	June	Tentative; this would include making the planning section consistent with 2009 CEDS 5-Yr. Plan
	•Review Dev. of Regional Impact, Local Comprehensive Plans, Growth Incentive Zones and Districts of Critical Planning Concern	Leslie R.	Ongoing	Ongoing	Bring ED angle to use of special CCC land use planning and regulatory tools
	•Coordinate EDC/CEDS Strategy Committee	Taree M.	Ongoing	Ongoing	• Monthly Mtgs. • Grant Admin.
	•Design & Coordinate Annual CEDS Evaluation	Leslie R.	March	May	Come up with an innovative/active way of involving stakeholders in process
	•Complete CEDS Annual Report	Leslie R.	May	June	Take into account any feedback on Year 1 report
Research	•2 Research Papers	Sandra P. Dan D.	December	March	Link to work on Priority Projects
	•Survey residents	Sandra P.	July	December	Low Priority; Pending avail. $$ to work with Donahue Institute - Draft instrument, conduct survey, compile results
	•Business Survey	Sandra P.	January	Year 3	High Priority; Pending avail. $$ to work with Donahue Institute - Draft instrument

Cape Cod Commission / Barnstable County Implementation Plan Year 2					
Action	Year 2	Lead	Start Month	End Month	Comments
Outreach	•CEDS Fall Meeting – Implementation	Dan D.	August	October	Workshop format; Focus on writing grants; STATS launch; new priority projects
	•CEDS Spring Summit – Evaluation	Leslie R.	March	May	Focus on Accomplishments and Year 3 action plan
	•STATS CapeCod Launch	Ryan E.	August	October	Fall meeting
	•White Paper & Survey Presentations	Sandra P.	Ongoing	Ongoing	Need to schedule these if they are to be a priority
	•Meet with EDICs	Dan D	June	December	PN1 and Dan should schedule round of visits
	•Reporting on CEDS activities	Leslie R.	January	June	EDC reporting throughout the year; at least one visit to CCC planning Committee
Data Dissemination – STATSCapeCod High Priority	•Maintain content on STATSCapeCod; Add new resources as available	Ryan E.	Ongoing	Ongoing	Develop maintenance schedule as necessary
	•Design Additional Balanced Economy Benchmarks	Leslie R.	Ongoing	Ongoing	Need to pull together technical team
	•Build Benchmarks database	Ryan E.	Ongoing	Ongoing	Partner with STATSAmerica
	•Build Town ES202 database	Ryan E.	Ongoing	July	On our server; develop data quality and update protocols
	•Dynamic Town Time series Profiles	Ryan E.	Ongoing	September	Partner with STATSAmerica
Regional Priority Projects – Lead	•Coastal Use Templates	Sandra P.	Ongoing	December	Case Studies by December; next steps in 2011
	•Redevelopment Authority	Leslie R.	Ongoing	December	Complete research phase – draft legislation
	•Complete Economic Centers Cost Analysis	Dan D.	Ongoing	June	Convene technical team; design study; conduct study & produce final report

Cape Cod Commission / Barnstable County Implementation Plan Year 2					
Action	Year 2	Lead	Start Month	End Month	Comments
Regional Priority Projects – Partner	•Coordination assistance on Regional Priority Projects	Dan D.	Ongoing	Ongoing	Help coordinate implementation and find funding
	•Track implementation progress on Regional Priority Projects	Dan D.	Ongoing	Ongoing	Determine what form this will take and implement
Direct Technical Assistance to Town Economic Centers (RESET)	•Identify development and redevelopment impediments and opportunities in areas designated for growth on the Regional Land Use Vision Map	Leslie R.	Ongoing	June	Sandwich

CEDS Action Plan Measures of Success

Measures of success were developed in the 5-year Update based on the CEDS goals and tied to the Cape Cod Commissions workplan. Process and outcome measures were identified in most cases; as of Year 1, most results are found under the process measures. The first table below outlines some of the results from Year 1 for each measure. Where possible we included in table two more specific measures and actual goals for the year.

CEDS Process – Measures of Success – Year 1				
Objective	Process/In-put Measures		Outcome Measures	
	Measure	Results	Measure	Results
Capital Investment	# of Grants Submitted: $$ of Funds Awarded	1 in-house; Planning Grant $60,000 3 by partners; Open Cape $40M	$$ of Private Investment Leveraged	2 million for Open Cape
Understanding of ED	# of Presentations given # of Reports published # of Articles written	Paul N. regular presentations to select boards, civic associations, and other groups 2 reports published	TBD	
Strong Partnerships	# of Partnerships # of new Partnerships	2 new partnerships around “buy local” and “entrepreneurship”	Formal Partnerships	Barnstable County & Open Cape Plankton Inc & WHOI
Easy Access to Information	Progress made on STATS Cape Cod	All resources posted, county profiles, maps, and plans all centrally located; some benchmarks completed	STATS Cape Cod user statistics	Cited in the newspaper;

CEDS Process – Measures of Success – Year 2				
Objective	Process/In-put Measures	Goal	Outcome Measures	Goal
Capital Investment	# of Grants Submitted: $$ of Funds Awarded	3 grants submitted	$$ of Private Investment Leveraged	
Understanding of ED	# of Presentations given # of Reports published # of Articles written	4 presentations; 2 reports published; 4 articles written by ED staff; Executive Director outreach	TBD	
Strong Partnerships	# of Partnerships # of new Partnerships	Long-term goal is 16 partnerships around 16 regional priority projects	Formal Partnerships	TBD
Easy Access to Information	# new dynamic features on STATSCapeCod # new datasets available on STATSCapeCod # new resources and reports posted on STATSCapeCod	3 new dynamic features; 4 new datasets; new resources and reports as available	STATS Cape Cod user statistics	

CHAPTER 5: CEDS REGIONAL PRIORITY PROJECTS: YEAR 1 EVALUATION & YEAR 2 MILESTONES

Evaluation of Progress on the 16 Regional Priority Projects

The CEDS Work Groups were re-convened during the month of April 2010 to review progress for Year 1 and establish goals for Year 2 on the 16 regional priority projects identified in the 2009 5-Year update. The Work Groups also retired some projects and added new projects as priorities after careful review of progress in Year 1 and taking into account issues and opportunities that have arisen over the last year.

Key highlights from year 1 include:

- OpenCape Telecommunication Infrastructure: OpenCape was awarded a $32 Million Broadband Technology Opportunity Program grant by the National Telecommunications and Information Administration on March 2, 2010, $8 million from the Commonwealth of Massachusetts, funding from Barnstable County, and $2 million in private funding from RCN Metro Optical Networks. The funding will allow OpenCape to build an open access middle mile network to support the economic, educational, public safety, and governmental needs of the southeast Massachusetts region. The project will include a 350 mile fiber optic network, wireless microwave network, and regional data center to be built over the next 3 years. The network will serve approximately 321,204 households, 515,648 individuals, and 62,129 businesses, and will connect more than 70 community anchor institutions to the network as part of its initial build-out, including 12 emergency shelters located in schools, 30 libraries, five colleges, 6 academic research facilities, and 18 town or public safety buildings. OpenCape estimates that the project will create more than 200 jobs in the equipment, construction, and manufacturing sectors, as well as an additional 200 indirect jobs.

- Energy Demand Reduction Program - Greening Existing Buildings: Historic Structures Retrofit Demonstration Project - The Cape's historic character—exemplified by the historic homes that line our ancient ways and village centers—plays a vital role in our tourism and second home economy. While historic homes constitute just over 11% of the housing stock, they are highly visible and must be protected. At the same time, we need to be responsible about our energy use. Retrofitting historic structures poses unique challenges, some of which were investigated at an historic preservation workshop on March 25, 2010 sponsored by the Cape Cod Commission.

  Energy Demand Reduction Program - Energy Efficiency Programs: Cape Light Compact and Massachusetts' gas and electric utility program administrators received approval for their three-year energy efficiency plan from the Department of Public Utilities on January 29, 2010. The $1.7 billion statewide plan will deliver energy efficiency services to Massachusetts residents and businesses and is expected to yield energy savings of nearly $5 billion. The types of programs and services offered under the plan include improved energy assessments of ratepayers' homes and businesses, and incentives for the purchase and installation of high efficiency lighting, appliances, heating and air conditioning, insulation, and air sealing. This historic plan will deliver integrated, effective, and measurable savings through energy efficiency programs to citizens, while addressing the challenges of climate change and fostering job growth and economic output within the state.

- Renewable Energy Generation Program - Ocean Energy Planning: The framework for ocean based community wind energy generation will promote coordinated and environmentally sound development. The process involves District of Critical Planning Concern designation that will result in a clear, equitable regulatory framework. Extensive outreach efforts will be employed to engage stakeholders in drafting the regulations and to inform the public of the issues and benefits of off-shore community-based renewables. A committee membership structure is currently being formed and will include a Policy Committee, Technical Committees, and Stakeholders Committee.

  Renewable Energy Generation Program - Algae Bio-fuel Refinery Pilot Project: The project team – including the Cape Cod Commission, Plankton Inc., Woods Hole Oceanographic Institution, and the Marine Biological Laboratory - has coalesced in an effort to seek funding opportunities. The algae research center is expected to open in the summer of 2010; the center is supported by a partnership of Plankton Inc., Woods Hole Oceanographic Institution, and the Marine Biological Laboratory. The Massachusetts Military Reservation and the Department of Defense are proposing a demonstration project involving bio-fuel for jets.

- Wastewater Infrastructure in Economic Centers: The population of Barnstable County has more than doubled since the late 1960's. Houses built on the Cape are contributing more and more nutrients, phosphorus, pharmaceuticals, and other pollutants into the environment, and the water quality is threatened by point and non-point pollution sources. Nitrogen loading alters chemical, biological, and ecological processes. Pollution has negative economic impacts which effect commercial fishing, and the recreational and tourism industries. With an economy dependent on seasonal tourism, the Cape is at a crossroads in planning for sewer infrastructure to protect its environment and its economy. This infrastructure presents the opportunity to guide and support smart economic growth and redevelopment, while protecting water quality. The Cape Cod Commission project team identified the redevelopment of the Parker's River Bridge and culvert opening as a specific wastewater infrastructure project. The

Cape Cod Commission Grant Committee is investigating options for funding different aspects of the project.

- Renewable Energy Technology Testing & Training Center: The project team is exploring partnerships and funding sources for a mid-scale wind turbine testing center. As applications for mid-scale turbines increase and this segment of the industry gains market share, sites for testing mid-scale turbine prototypes are needed. The Cape Cod Commission and Cape and Islands Self-Reliance are cultivating partners for this project. As more wind energy is developed in the Northeast, it is becoming increasingly important that owners and operators of projects have access to certified wind energy technicians. Currently, due to the dearth of trained technicians in the Northeast, owners and operators must request and then wait for technicians to arrive from other parts of the country. Positive discussions have taken place with the Massachusetts Maritime Academy (MMA) about the possibility of developing curriculum to train wind energy technicians here on Cape Cod: an idea that is particularly pertinent with the advent of Cape Wind and the growing demand for these skills across all of New England. The premise is to develop a program at the MMA where interested individuals from across the Northeast could receive training to become wind energy technicians.

- Entrepreneurship Capital Access & Training Program: The project facilitates collaboration and coordination efforts across numerous service providers to improve and expand entrepreneurial services on the Cape. A number of program elements are in place. A Connectivity Team has been assembled—with the Cape Cod Chamber of Commerce as the lead agency—to screen entrepreneurs and connect them with existing assistance services. A near-term goal is to have selected entrepreneurs enter a formal program of assistance—designed by the Connectivity Team working with a small team of established entrepreneurs—tailored specifically to the applicants' needs. This process includes an annual community-supported business plan competition called Entrepreneurs Weekend, which was held this year on March 12-14. A longer-term goal of this project is the creation of new sources of financing to complement existing ones. All goals will be met through the pursuit of innovative partnerships with industry, academia, non-profits, and public agencies.

- Community Green: Enterprise Center Design & Construction: The lead agency, Housing Assistance Corporation (HAC), is researching integrated financing and program models to optimize project design. Revenue generating activities are being explored to create long-term sustainability. HAC is developing agricultural and green jobs training components.

- Capitalize the Cape Cod Fisheries Trust: The lead agency, the Cape Cod Fisheries Trust, submitted a request for funding to the EDA in late March 2010; the request is currently under review. Some activities of the Trust are underway with funding support from private funders, but EDA funding is needed by the Trust to reach its capitalization goal of $10 million. Partnership with Amplifier Strategies, Inc. http://www.amplifierstrategies.com/ and the Cape Cod Commission was established to develop economic and socio-economic indicators for the fisheries industry on Cape Cod.

- Buy Local Infrastructure Development Program: The project team is established with Community Development Partnership as the lead agency. The team is working on developing a Logic Model to guide project assessment, design, development, implementation, and evaluation. Near-term tasks have been established including undertaking a leakage study, mapping restaurants that emphasize local ingredients and exploring how to link the map to a cell phone application, and completing the logic model. The team has adopted the "3/50 Project" to stimulate more local buying. The program encourages consumers to pick three locally owned independent businesses and spend $50 each month at those establishments.

- Redevelopment Authority – Feasibility Analysis: The Cape Cod Commission project team is in the process of conducting research on redevelopment authorities on a regional, state, and local level and investigating their scope of authority. The team is also researching Transfer of Development Rights (TDR) as a mechanism to shift development potential and compiling case studies applicable to Cape Cod.

- Economic Centers Cost Analysis: The Cape Cod Commission project team is assembled. The research phase, including a literature search, is underway. Geographic sub-regions on the Cape have been identified for case studies.

- Coastal Use Templates for Economic Development: The Cape Cod Commission project team developed an implementation plan and an outline with a Gantt chart to reflect the methodology and refinement of the scope. Progress has been made on many near-term tasks. Initial GIS data was assessed and major coastal economic industry sectors were identified, including Natural Resource Industries; Marine Sciences, Technology & Education; Infrastructure & Services; Leisure & Hospitality; and Arts & Culture. GIS data were mapped including: natural resources, recreation, harbor infrastructure, educational institutions, and commercial activities. Based on this assessment, five prototype harbors representing the major industry sectors were identified as case studies: Woods Hole, Falmouth; Hyannis; Harwich; Chatham; and Provincetown. Various matrices were developed to identify potential threats to coastal economic values and coastal resources and to identify the ecosystem services provided by various coastal resources. The project team interviewed town officials, conducted site visits, and collected baseline land use data to identify primary economic assets and liabilities. The site data is being compiled into summary reports.

Key milestones identified for year 2 include:

- OpenCape Telecommunication Infrastructure: Apply for grants for database development, servers, & applications. Plan and find funding for Phase 2 to build regional and municipal area networks.

- Energy Demand Reduction Program- Greening Existing Buildings: Historic Structures Retrofit Demonstration Project - Research similar projects as well as the funding and feasibility of Deep Energy Retrofits for historic structures while maintaining historic preservation standards. Investigate opportunities to do a local demonstration project.

  Energy Demand Reduction Program- Energy Efficiency Programs: Obtain Department of Public Utilities Approval of Energy Efficiency Reconciliation Factor in an effort to increase funding for energy efficiency programs. If enabled through state legislation, implement a revolving loan betterment program for cities and towns to allow residents to make energy efficiency investments to be repaid through property taxes.

- Renewable Energy Generation Program - Ocean Energy Planning: Formal participation process using technical, policy, and stakeholder committees will be implemented. Technical Report will be completed to inform development of regulations identifying areas appropriate for siting of wind turbines and their appropriate scale; regulatory guidelines for sand and gravel extraction will also be completed. Local and county regulations may be implemented to reflect these recommendations.

  Renewable Energy Generation Program - Algae Bio-Fuel Refinery Pilot Project: Pursue the licensing, commercial development, & funding of plant.

- Wastewater Infrastructure in Economic Centers: Prepare grant proposals to seek funding for Parker Rivers Bridge project, which includes a follow up to the flushing study, bridge design, and proximate streetscape & public spaces. Complete the DLTA funded Interim Wastewater Solutions Analysis for the Town of Sandwich. Complete the Wastewater Infrastructure Needs Assessment for East Harwich based on draft zoning.

- Renewable Energy Technology Testing & Training Center: Continue to pursue wind energy technician training program with the Massachusetts Maritime Academy and Cape Cod Community College. Explore grant funding. Once a funding source is identified, work with public and private-sector partners to define certificate program. Continue to explore partnerships and funding sources for mid-scale wind turbine testing center.

- Entrepreneurship Capital Access & Training Program: Track local indicators that reflect services to entrepreneurs (e.g. loans, provision of technical assistance, types of business start-ups established, jobs created). Refine Connectivity Team activities and continue to develop program components for the team. Build on the successes of the previous two Entrepreneurs Weekends when planning Entrepreneurs Weekend III. Continue to explore additional sources of small business capital. Work with Regional Technology Development Corporation to expand services offered to the innovation sector.

- Community Green Enterprise Center Design & Construction: Develop a comprehensive business plan. Obtain a planning grant to dedicate staff resources for moving the project forward. A partnership with the Boston Architectural Center will involve the design and construction of a model home. The model home built in collaboration with Tufts University will be sited and occupied.

- Capitalize the Cape Cod Fisheries Trust: Complete Amplifier data collection project for tracking program indicators. Continue to distribute fish quota through the application of the permit system. Retain jobs and track secondary tier businesses that serve the fisheries industry.

- Buy Local Infrastructure Development Program: Complete development of Logic Model for designing the scope of the regional project. Identify financial resources to complete leakage study. Work with the Cape Cod Commission GIS Department to map restaurants that emphasize local ingredients and identify how to integrate map with cell phone applications. Continue to promote the "3/50 Project."

- Specialized 4-year College - Feasibility Analysis: Convene project team to identify a lead agency. Identify a diplomatic team to perform outreach to educational institutions.

- Redevelopment Authority – Feasibility Analysis: Establish technical workgroup to meet quarterly. Research Transfer of Development Rights (TDR), particularly valuation and banking, and research alternatives to TDR. Complete case studies applicable to Cape Cod. Research financing options for start-up and maintaining a redevelopment agency; research organizational options under current MA law. Complete report on feasibility. Draft legislation.

- Economic Centers Cost Analysis: Complete assembly of project team and develop detailed project outline. Conduct interviews/focus groups with selected individuals who represent the development community on Cape Cod. Complete literature search. Engage project team and selected CEDS partners in dialogue based on completed research and data/information collected from interviews to develop sub-regional case studies.

- Coastal Use Templates for Economic Development: Complete research for the harbor case studies and develop a set of best practices and lessons learned. Prepare a draft case study report and present it to the Association to Preserve Cape Cod (APCC) Business Roundtable; finalize the report. Prepare Phase 2 work plan to craft a Land Use Template Design model for developing a healthy year-round coastal economy on Cape Cod. The Phase 2 work plan will also involve creating an economic development template for a non-harbor site.

The following tables summarize the results of this evaluation – the following color key shows how the progress of the projects is depicted on these charts. The charts are organized by the CEDS work groups that identified them as priorities in the 5-year plan. The final table outlines the new projects added to the docket.

Table Key	
Phase not yet underway	Grey
Phase completed	Green
Phase underway	Orange
Year 2 Milestones	Yellow

CEDS Infrastructure Development Work Group Priority Projects						
Project	**Description**	**Lead Agency/ Project Team**	**Plan**	**Fund**	**Build/ Implement**	**Year 2 Milestones**
Open Cape Telecom Infrastructure	Middle mile network from Woods Hole to Provincetown	**Open Cape** • Barnstable County • RCN • Towns	Full Business Plan Completed	**AWARDED! $40 Million ($30M Federal, $8M State, $2M Private)**	Staffing Process Underway; 18 months to first phase expected to be complete	• Apply for grants for database development, servers, & applications • Plan & find $ for Phase II to build regional and municipal area networks
Energy Demand Reduction Program - Greening Existing Buildings	Energy efficiency programs	**Cape Light Compact** • Utilities • MA Energy Efficiency Advisory Council • MA Dept. of Public Utilities	Existing program expanded	Rate Payer Funded	Three Year Energy Efficiency Plan Approved and Program Fully Underway	• DPU Approval of Energy Efficiency Reconciliation Factor • If passed, Implementation of Pending PACE legislation "Revolving Loan Fund Betterment Program"
	Historic structures retrofit demonstration project	**TBD** • Cape Cod Commission • Cape Light Compact • MA Historic • CIRENEW				• Research similar projects • Research funding & feasibility of Deep Retrofit • ID local project
Renewable Energy Generation Program	Algae bio-fuel refinery pilot project	**Cape Cod Commission** • Barnstable County • MMR • WHOI/MBL • Plankton Inc. • New England Biofuels • State of MA	• Implementation Plan Drafted • Project outlined also in Grant Proposal submitted Summer of 2009	Dept of Energy Proposal Submitted but not awarded; other options being pursued (Clean Energy Center, etc.)	• Potential for Plankton/WHOI/ MBL algae research collaboration • Investigating MMR/DOD demonstration of bio-fuel for jets • Coordination of project team around funding	• Licensing, commercial development, & funding of plant

	Ocean Energy Planning	**Cape Cod Commission CIRENEW** • Cape Light Compact • Self-Reliance • WeeInfo • UMass • WHOI/MBL • Energy Service Cos. • Old Colony	• DCPC Process and Technical, Policy, & Stakeholder Committee Structure Established • 2009 Renewable Energy Stakeholder Consensus Statement	• DCPC process funded by CCC	• DCPC designated; Committee membership being determined • On-going outreach efforts to engage stakeholders and inform public of issues and benefits of off-shore community-based renewables	• Technical Report and rigorous participation process • County Ordinance identifying areas appropriate for siting of wind turbines and their appropriate scale; regulatory guidelines for sand and gravel extraction • CIRENEW issue Cape & Islands Energy Technology Strategy
Wastewater Infrastructure in Economic Centers	Design and build wastewater infrastructure where density is desired	**Cape Cod Commission** • Town of Yarmouth • East Harwich • Town of Sandwich	• Identified Redevelopment of Parker River Bridge and opening of culvert as a specific project • Interim WW Solutions Analysis for Sandwich	• CCC Grant Committee is investigatin g options for funding different aspects of the project • DLTA funded		• Prepare grant proposals to seek funding for flushing study, bridge design, and proximate streetscape & public spaces • Complete Sandwich WW study • WW Infrastructure Needs Assessment for E. Harwich based on draft zoning

CEDS Workforce Development Work Group Priority Projects						
Project	**Description**	**Lead Agency / Project Team**	**Plan**	**Fund**	**Build / Implement**	**Year 2 Milestones**
Renewable Energy Technology Testing & Training Center	Testing & training around renewable energy technology development	**Self-Reliance** • National Park Service • UMass (Amherst & Dartmouth) • Cape Cod Commission • MMA • MMR	Draft Completed	July 2, 2010 funding opportunity for curriculum development	• Initial funding opportunity with NREL explored with Seashore, UMass-Amherst, Self- Reliance-proposal not submitted, awaiting next funding opportunity • Training for Renewables-focus on Wind (no training in MA now); MMA on board	Training: • Grant Funding • Defined Certificate Program Model • MOA with MMA • CCCC course links Testing: • NREL discussions • Outreach to producers
Entrepreneurship Capital Access & Training Program	Entrepreneurship training	**Cape Cod Chamber** • RTDC • Coastal Community Capital • C&I Workforce Investment Board • Cape Cod Community College	Draft Completed	$17,500 State $1,650 Event fees	• Entrepreneurs Weekend • Connectivity Team (entrepreneur case management)	• Track local successes (i.e. # of jobs, etc.) • Business Book club • Plan Entrepreneurs Weekend 3 • Business Curriculum-workshops & CCCC tie-in
	Entrepreneur capital (SBIR etc.)	**RTDC** • SCORE • SBA @ UMass Small Bus Dev Center • State of MA				• Access to capital-research & develop sources • Seek MTDC $ distribution at regional level • Identify venture capital opportunities

CEDS Sector Development Work Group Priority Projects

Project	Description	Lead Agency/ Project Team	Plan	Fund	Build/ Implement	Year 2 Milestones
Community Green Enterprise Center Design & Construction	Design and build Community Green Enterprise Center	**Housing Assistance Corporation**	Draft Completed	• $1 mil Delahunt earmark for treatment plant in progress • Match needed prior to EDA proposal • Plan to apply for HUD Sustainable Communities grant • $100K saved	• Researching revenue generators • Developing microplans for different components of project • Agricultural plan connected to job training	• Comprehensive business plan • Obtain matching funds Goal-$2 mil from private • Boston Architectural Center design & build house; Tufts model home sited and occupied • Obtain planning grant to dedicate staff/time for moving project forward
Capitalize the Cape Cod Fisheries Trust	Fund the purchase of fishing rights for local fishermen	**Cape Cod Fisheries Trust** • Hook Fisherman's Association • Amplifier Strategies • Cape Cod Commission • Community Development Partnership • Mass Development	Draft Completed	• Proposal Submitted to EDA • Plan B: Federal appropriation, alternate granting sources, state sources	• Underway with existing funding commitments • Identified triple bottom line • Built political support • Scallop quota	• Complete Amplifier data collection project for tracking program outcomes • Distribute fish quota • Retain jobs • Second-services businesses around fishing industry

CEDS Business Development Work Group Priority Projects						
Project	**Description**	**Lead Agency / Project Team**	**Plan**	**Fund**	**Build / Implement**	**Year 2 Milestones**
'Buy Local' Infrastructure Development Program	Investments to encourage and facilitate use of locally produced goods and locally owned businesses	**Community Development Partnership** • Cape Cod Commission • Sandwich Chamber of Commerce • Hyannis Main Street BID • Cooperative Extension • Cape Cod Hook Fishermen's Association	Draft Completed	Various funding sources support existing programs. Project will be seeking future funding for activities associated with regional umbrella project and leverage existing support	• Underway with project team meetings • Adopted a 3/$50 project for marketing promotion	• Strategy for tech infrastructure: web 2.0/social media/ smart apps program • Kiosk program in transportation facilities • New partnerships • Cape Cod Wedding registry feasibility • CC Hook to establish community supported fishery
ADA & Building Compliance Loan Program	Regional revolving loan fund for code compliant renovations in economic centers	**TBD** • Community Development Partnership • Coastal Community Capital • Cape Cod Chamber • Local Chambers • Cape Cod Commission • Cape Cod Economic Development Council				*Determine if the goals of this project could be met through a regional financing or redevelopment authority*
Specialized 4-year College - Feasibility Analysis	Independent or affiliated undergraduate institution	**TBD** • Cape Cod Community College • MMA • WHOI • MBL • Cape Cod Chamber • Hyannis BID • Highlands Center • Mass Development • Delegations • RTDC • National Graduate School				• Convene project team to identify a lead agency • Identify a diplomatic team to perform outreach to educational institutions

CEDS Business Climate Work Group Priority Projects						
Project	**Description**	**Lead Agency / Project Team**	**Plan**	**Fund**	**Build / Implement**	**Year 2 Milestones**
Redevelopment Authority - Feasibility Analysis	Feasibility analysis of regional redevelopment instruments	**APCC Business Roundtable** • Cape Cod Commission • Town of Barnstable • Yarmouth Chamber of Commerce	Completed	CCC & EDC	Research phase underway	• Compile case studies applicable to Cape Cod • Research TDR, particularly valuation and banking • Research alternatives to TDR • Establish technical workgroup to meet quarterly • Complete report on feasibility • Draft legislation
Development in Economic Centers - Cost Analysis	Development cost analysis by location	**APCC Business Roundtable** • Cape Cod Commission	Draft Underway	CCC & EDC	Research phase set to begin in June	• Yarmouth case study along with other areas within different sub regions of the Cape and of different sizes • Field Research completed • Report to BRT
Coastal Use Templates for Economic Development	Coastal land use analysis	**Cape Cod Commission** • Towns including Planners, Harbor Masters, Shellfish Wardens etc. • APCC/Business Roundtable	Completed	CCC & EDC	• Assessment of initial GIS data • Interviews with towns/site visits • Baseline land use analysis	• Complete research for harbor case studies • Prepare report – present to BRT & finalize • Prepare Phase 2 work plan for non-harbor areas

New CEDS Priority Projects

Project	Description	Lead Agency/ Project Team	Plan	Fund	Build/ Impleme nt	Year 2 Milestones
Regional Information Clearinghouse	Centralize regional data to facilitate	**TBD** • Cape Cod Tech Council • Cape Cod Commission				• Scope project – identify needs and capacity
Center of Excellence for Water Quality Technologies & Innovation	Establish a Center of Excellence focused on smart management of drinking waste and coast	**RTDC** • IBM • Foster Miller • WIB • Cape Cod Commission • MBL • WHOI	Project outline and discussions among partners is underway	• Two SBIR grants for Petrol (private start-up) for real-time water quality testing • $1.5 million grant submitted to DOD		• Develop business plan • Plan and obtain funding • Partnership with private company
Canal Area Assessment & Transportation Improvement	Improved transportation across the canal focused on rail to facilitate economic development	**CCRTA** • MPO • RTA • Cape Cod Commission • Cape Cod Chamber				• Complete Canal Area Transportation Study (CATS) • Pilot rail service from Boston to the Cape feasibility
Waste Minimization: Reduce, Reuse, Recycle	To establish regional waste minimization strategies and best management practices	**TBD** • Cape Cod Commission • Cape Towns				• Scope project – identify needs and capacity

- End-

Appendix

Appendix 1: CEDS Participation:
CEDS Stakeholders & Meeting Agendas
(Meeting Minutes Available on Request)

CEDS Stakeholders

Name	Organization	Work Group
Dick Krant	Alternative Energy Center	Sector
Maggie Geist	Assoc. to Preserve CC	Bus Climate, Sector
Maggie Downey	Asst. County Administrator	Infrastructure
Eliza Cox	Attorney	Bus Climate
Ed Maroni	Barnstable Patriot	
Art Traczyk	Barnstable Principal Planner	
Coreen Moore	Bourne Town Planner	
Alan McClennen	Business Roundtable	
Bill Zammer	Business Roundtable	Sector
David Augustinho	C&I Workforce Investment Board	Workforce
Diane Vendetti	C&I Workforce Investment Board	Bus Dev
Rich Brothers	Cape and Islands United Way	
Georgia Carvalho	Cape Cod Comm. College Grants Writer	
Bill Clark	Cape Cod Cooperative Extension	Bus Dev
Alice Boyd	Cape Cod Economic Development Council	
Allen White	Cape Cod Economic Development Council	
Brian Mannal	Cape Cod Economic Development Council	
Charlotte Striebel	Cape Cod Economic Development Council	
Dan Wolf	Cape Cod Economic Development Council	Bus Climate
David Willard	Cape Cod Economic Development Council	
Elliott Carr	Cape Cod Economic Development Council	Bus Climate
Felicia Penn	Cape Cod Economic Development Council	
John Harris	Cape Cod Economic Development Council	Bus Climate
John Kilroy	Cape Cod Economic Development Council	Sector
Ken Cirillo	Cape Cod Economic Development Council	Workforce
Paul Rumul	Cape Cod Economic Development Council	
Richard Gurnon	Cape Cod Economic Development Council	
Rick Presbrey	Cape Cod Economic Development Council	
Van Northcross	Cape Cod Healthcare	Sector
Maggie VanSciver	CC Arts Foundation	Sector,Workforce
Clare O'Connor	CC Chamber of Commerce	Workforce
Michele Pecoraro	CC Chamber of Commerce	Sector
Wendy Northcross	CC Chamber of Commerce	Sector
Kathy Schatzberg	CC Comm College	
Phil Sisson	CC Comm College	Workforce
Sue Miller	CC Comm College	Workforce
Lisa McNeill, VP	CC Foundation	

Name	Organization	Work Group
Paul Parker	CC Hook Fishermen's Association	Sector
Sue Nickerson	CC Hook Fishermen's Association	Sector
Bob Dwyer	CC Museum of Natural History	Bus Dev
Peter Karlson	CC Technology Council	Infrastructure
Teresa Martin	CC Technology Council	Infrastructure
Sarah Shemkus	CC Times	
Clay Schofield	CCC	Infrastructure
Dixie Norris	CCCC	
Dorothy Savarese	CEO, Cape Cod Five	
Florence Seldin	Chatham BOS	Sector
Terence Whalen	Chatham Town Planner	
Chris Powicki	CIREC	Infrastructure
Jeanine Marshall	Coastal Community Capital	Bus Dev
William Delahunt	Congressman	
Diana Duffley	Country Garden	Infrastructure
Tom Keyes	County - Econ Affairs	
Bill Doherty	County Commissioner	Bus Climate
Sheila Lyons	County Commissioner	Bus Dev
Mary Pat Flynn	County Commissioner, CCEDC	Workforce
Darlene Johnson-Morris	County RDO	
Leo Cakounes	Cranberry Growers	Sector
Daniel Fortier	Dennis Town Planner	
Jo Anne Miller-Buntich	Dir. Growth Mgmt, Town of Barnstable	Bus Climate
Mark Ells	DPW Dir. - Town of Barnstable	Infrastructure
Carol Woodbury	D-Y Reg. School District	Workforce
Gay Wells	Economic Development Consultant	
Brian Nickerson	Environmental & Readiness Ctr., Camp Edwards	Workforce
Sallie Riggs	Executive Director Bourne Financial Dev	
Marie Oliva	Executive Director CC Canal Region Chamber	
Lisa Franz	Executive Director Chatham Chamber	
Spyro Mitrokostas	Executive Director Dennis Chamber	
Sandra Davidson	Executive Director Harwich Chamber	
Jill Ross	Executive Director Institutional Research CCCC	
Mary Lou Palumbo	Executive Director Mashpee Chamber	
Mary Corr	Executive Director Orleans Chamber	
Candice Collins-Boden	Executive Director Provincetown Chamber	
Jessica Erickson	Falmouth Asst. Town Planner	
Jay Zavala	Falmouth Chamber of Commerce	Workforce
Bob Murray	Falmouth Housing Authority	Bus Climate
Brian Currie	Falmouth Town Planner	

Name	Organization	Work Group
Marcia King	Grant Writer Town of Barnstable	
Larry Cole	Harwich BOS	Bus Climate
David Spitz	Harwich Town Planner	
Virginia Ryan	Housing Assistance Corporation	Sector
Deb Converse	Hyannis Area Chamber of Commerce	Bus Dev
Amanda Converse	Hyannis Main Street BID	Bus Dev
Elizabeth Wurfbain	Hyannis Main Street BID	Bus Dev
Cameron Brooks	IBM	
Maryclare Querzoli	IBM	
Michael Sullivan	IBM	
Carol Alper	Independent Consultant	Sector
Elizabeth Bridgewater	Lower Cape CDP	Bus Dev
Doug Storrs	Mashpee Commons	Bus Climate
Elsa Partan	Mashpee Enterprise	
Thomas Fudala	Mashpee Town Planner	
Cliff Robbins	Mass Small Business Dev. Center	Bus Dev
Lauren McKean	National Seashore	Workforce
Dan Gallagher	Open Cape	
John Jannell	Orleans Asst. Town Planner	
George Meservey	Orleans Director of Planning & Comm. Dev.	
Curt Felix	Plankton, LLC	
Peter Meyer	President and Publisher, Cape Cod Times	
S. Kyle Hinkle	President Brewster Chamber	
Jim Russo	President Eastham Chamber	
Lucie Grozier	President Truro Chamber	
Robert Morrill	President Wellfleet Chamber	
David Gardiner	Provincetown Asst. Town Manager	
Michelle Jarusiewicz	Provincetown Community Housing Specialist	
Stephen Melamed	Provincetown Economic Development Council	
Bob Curtis	Regional Technology Development Corp.	Workforce
Steve Withrow	Regional Technology Development Corp.	Bus Dev
Steve Roderick	Roderick Payroll	Bus Dev
Kate Bavelock	Sandwich Chamber	Bus Dev
Gregory Smith	Sandwich Director of Planning & Development	
Paul Babin	Sandwich Enterprise	
Megan Amsler	Self-Reliance	Workforce
Micaelah Morrill	Sen. O'Leary	
Sue Rohrbach	Sen. O'Leary	
Cleon Turner	State Rep	

Name	Organization	Work Group
Demetrius Atsalis	State Rep	
Jeffrey Perry	State Rep	
Matthew Patrick	State Rep	
Sarah Peake	State Rep	
Robert O'Leary	State Senator	
Therese Murray	State Senator	
George Price	Superintendant, National Seashore	
Matt Lee	Tocci, Goss & Lee, PC	Workforce
Sue Leven	Town Planner, Brewster	Infrastructure
Sarah Raposa	Town Planner, Eastham	Infrastructure
Charleen Greenhalgh	Truro - Asst Town Admin.	Infrastructure
Paul Pilcher	Wellfleet - EDC	Sector
Rex Peterson	Wellfleet Asst. Town Administrator/Planner	
Kevin Howard	Wise Living	Bus Climate
Bob Dubois	Yarmouth Chamber of Commerce	Bus Climate
Karen Greene	Yarmouth Director of Community Development	
Terry Sylvia	Yarmouth Town Planner	
Mary LeClair		

EDC (CEDS Strategy Committee) Meetings

Cape Cod Economic Development Council

Monthly Meeting Agenda

Meeting Date: Thursday, September 3, 2009
Time: 4:00 – 5:30
Location: Cape Cod Commission Conference Room

1. Board Minutes

2. Council Chair's Report

3. Grant Committee Report
   - Grant Extension Request: Dennisport Charette; 6/30/10
   - Grant Extension Request: CEDS Phase 1; 6/30/10

4. CEDS Implementation Update
   - Regional Priority Project Timeline
   - Implementation Kick Off

5. RESET Update
   - Yarmouth: Route 28
   - Bourne: Buzzards Bay Revitalization
   - Sandwich: Golden Triangle

6. Data Center Update

7. Public Outreach Update

8. Other

Meeting Date: Thursday, October 1, 2009
Time: 4:00 – 5:30

Location: Cape Cod Commission Conference Room

1. Council Chair's Report
   - Approval of Board Minutes (attached)

2. Grant Committee Report
   - Grant Extension Request: Dennisport Charette; 6/30/10
   - Grant Extension Request: CEDS Phase 1; 6/30/10
   - Small Grant Program: will these be offered this fall?

3. CEDS Implementation Update
   - Regional Priority Project Timeline (draft attached)
   - Implementation Kick Off October 27, 2009 (draft agenda attached)
   - American Recovery and Reinvestment Act – Bond Programs
   - IBM Centers for Excellence for Water Management

4. RESET Technical Assistance to Towns Update

5. Data Center Update

6. Public Outreach Update

7. Other

Meeting Date: Thursday, November 5, 2009
Time: 4:00 – 5:30
Location: Cape Cod Commission Conference Room

1. Council Chair's Report
   - Approval of Board Minutes (attached)

2. Grant Committee Report
   - Small Grant Program: Continued discussion of funding availability.
   - Clean Energy Training Update

3. CEDS Implementation Update
   - Debriefing of CEDS Kick-Off Event
   - IBM Collaboration Update

4. RESET Update

5. Data Center Update

6. Public Outreach Update

Meeting Date: Thursday, December 3, 2009
Time: 5:00 – 6:30
Location: Cape Cod Commission Conference Room

1. Council Chair's Report
   - Approval of Board Minutes (attached)
   - Nominating Committee Report
   - FY2011 Operating & Capital Budget (narrative attached)

2. Grant Committee Report
   - Small Grant Program: Continued discussion; leveraging District Local Technical Assistance (DLTA) funding to assist towns and regionalization
   - Arts Guide – PowerPoint Presentation

3. CEDS Regional Priority Projects
   - Progress tracking & communication systems

4. Town Technical Assistance Projects
   - Yarmouth Rt. 28 Project – PowerPoint Presentation

5. Data Center

6. Other

Meeting Date: Thursday, January 7, 2010
Time: 5:00 – 6:30
Location: Cape Cod Commission Conference Room

1. Council Chair's Report
   - Approval of Board Minutes (attached)

2. Grant Committee Report
   - Grant Committee Program Parameters Recommendations
   - Small Grant Final Report: Presentation on the "Practical Guide for Municipal Investment in Arts & Culture on Cape Cod" by Elizabeth Hude, Cape Cod Commission Special Projects Coordinator. (Guide and Report to the EDC attached)

3. CEDS Regional Priority Projects
   - Wastewater in Economic Centers: Update on Regional Wastewater Plan and related activities by CCC Staff

4. Town Technical Assistance Projects
   - Yarmouth Rt. 28: Update on the RESET project with Yarmouth looking at opportunities along the Rt. 28 Corridor by Leslie Richardson, Cape Cod Commission Economic Development Officer

5. Data Center
   - Update; full presentation to be provided at February Meeting

6. Other

Meeting Date: February 4, 2010
Time: 5:00 – 6:30
Location: Cape Cod Commission Conference Room

1. Council Chair's Report
   - Approval of Board Minutes (attached)
   - Nominating Committee Report - New Member Introduction
   - Budget Meeting Report

2. Grant Committee Report

3. CEDS Implementation Update
   - CEDS Review by Paul Niedzwiecki
   - <u>Update</u>: Regional Priority Projects
   - <u>Demonstration</u>: Project Management Efforts – dot.Project

4. RESET Update
   - Presentation: Town Technical Assistance Projects – Yarmouth Rt. 28: Update on the RESET project with Yarmouth looking at opportunities along the Rt. 28 Corridor by Leslie Richardson, Cape Cod Commission Economic Development Officer

5. STATSCapeCod/Affiliate State Data Center

6. Other

Meeting Date: March 4, 2010
Time: 5:00 – 6:30
Location: Cape Cod Commission Conference Room

1. Council Chair's Report
   - Approval of Board Minutes (attached)
   - Cape & Island License Plate Review - Paul Rumul - History, explanation, perspective, future.
   - Budget Update
   - Nominating Committee Report

2. Grant Committee Report
   - Letter's of Intent – selection to submit full proposals

3. CEDS Implementation Update
   - Presentation: *CEDS Annual Evaluation Proposed Process* by Leslie Richardson, Cape Cod Commission Economic Development Officer

4. RESET Update - *No update this month*

5. STATSCapeCod/Affiliate State Data Center
   - Presentation: *The STATSCapeCod Website & Partnership* by Leslie Richardson, Cape Cod Commission Economic Development Officer with Ryan Ellison, Data Center Research Analyst

6. Other

Meeting Date: April 1, 2010
Time: 5:00 – 6:30
Location: Cape Cod Commission Conference Room

1. Council Chair's Report
    - Approval of Board Minutes (attached)
    - Introduction of new member Alice Boyd
    - Budget Update

2. Grant Committee Report

3. STATSCapeCod/Affiliate State Data Center
    - Presentation: *The STATSCapeCod Website & Partnership* by Leslie Richardson, Cape Cod Commission Economic Development Officer with Ryan Ellison, Data Center Research Analyst

4. CEDS Implementation Update
    - EDC role in CEDS Annual Evaluation – Leslie Richardson

5. RESET Update - *No update this month*

6. Other

Meeting Date: May 6, 2010
Time: 5:00 – 6:30
Location: Cape Cod Commission Conference Room

1. Council Chair's Report
    - Approval of April Board Minutes and March Minutes as amended (attached)

2. Grant Committee Report
    - Approval of April Committee Meeting Minutes

3. CEDS Annual Evaluation

- EDC review of Year 1 Workplan
- EDC approval of Year 2 Workplan

4. Other

Meeting Date: June 3, 2010
Time: 5:00 – 6:30
Location: Cape Cod Commission Conference Room

1. Council Chair's Report
   - Approval of May Board Minutes (attached)

2. CEDS Annual Evaluation
   - Approval of Annual Report (draft attached)

3. Other

Example Invitation for CEDS Workgroup Meetings:

From: Taree McIntyre [mailto:tmcintyre@capecodcommission.org]
Sent: Friday, March 19, 2010 1:31 PM
To: pk@neueon.com; sleven@town.brewster.ma.us; assttownadm@truro-ma.gov; sraposa@eastham-ma.gov; Maggie Downey; mark.ells@town.barnstable.ma.us; dianad@countrygarden.com; Clay Schofield; chrisp@weeinfo.com; teresa@capeeyes.com
Subject: CEDS Infrastructure Work Group Session - April 27, 2010

Dear CEDS Infrastructure Work Group Members,

I am writing to ask that you lend your time and guidance once again to the CEDS – this time as part of the annual evaluation process. We are planning a single three hour session bringing your work group together on April 27th.

The purpose of the April 27th meeting of your work group is twofold:

- To assess progress on the three priority projects your work group identified last spring as part of the CEDS five-year update, and
- To determine a set of year two milestones and measures of success.

Last year, thanks to your leadership, we completed the five-year economic development strategy (CEDS) for the Cape. EDA certified the report in record time with compliments on its clarity and content. Implementation of the CEDS began immediately and the continued involvement of stakeholders has been gratifying. Annually, we need to report on our joint progress to the US Economic Development Administration in writing by the end of June. Your willingness to contribute to this effort will make all the difference in our success in meeting this obligation and, more importantly, in implementing the CEDS.

To accommodate the work group meeting we have reserved the Commission's conference room for:

- Tuesday, April 27th from 9:00 am to 12:00 pm

Please let me know if you will be able to contribute your time as outlined above.

Thank you and best regards,
Taree McIntyre

Taree McIntyre
Cape Cod Commission
3225 Main Street, PO Box 226
Barnstable, MA 02630
(508) 362-3828
(508) 744-1208 (direct)
(508) 362-3136 (fax)
tmcintyre@capecodcommission.org

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BARNSTABLE, MASSACHUSETTS 02630

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CAPE COD COMMISSION

Dear CEDS Stakeholders:

Please join us at the **CEDS Spring Summit** to celebrate the end of our 1st year implementing the Cape Cod Comprehensive Economic Development Strategy (CEDS). The purpose of the conference is to inform you of the progress made in Year 1 and seek your endorsement on the priorities for Year 2 CEDS process.

The summit will begin with **Senate President Therese Murray**. She will bring us up to date on the economic development proposals pending in the state legislature.

The Summit is scheduled for:

Wednesday, May 12, 2010
Continental Breakfast: 7:30 – 8:00 AM
Conference: 8:00 – 11:00 AM

RHCI (Rehabilitation Hospital of the Cape & Islands)
311 Service Road, East Sandwich, MA 02537

Please RSVP by May 1, 2010.

Thank you for your commitment to Barnstable County's economic future and the Comprehensive Economic Development Strategy. We look forward to seeing you at the conference.

Contact: Taree McIntyre at the Cape Cod Commission – 508/362-3828

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BARNSTABLE, MASSACHUSETTS 02630

(508) 362-3828 • Fax (508) 362-3136 • www.capecodcommission.org

CAPE COD
COMMISSION

CAPE COD COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY
2010 CEDS Evaluation Summit

Date:	May 12, 2010
Time:	Registration & Coffee at 8:00; Close of Business at 11:30
Location:	Rehabilitation Hospital of the Cape and Islands (RHCI), 311 Service Road, Sandwich

8:20 am	Welcome & Introductions
8:30 am	Terese Murray – Legislative Proposal to Reform State Economic Development Activities
9:40 am	Year 1 Successes – What has been accomplished in the first year implementing the CEDS
10:30 am	Year 2 Work Plan - Results from the Work Group Evaluation Sessions • Introduction of New Projects • Milestones for Year 2
11:15 am	Closing Remarks

Thank you all for coming & participating in the CEDS Year 1 Evaluation!

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CAPE COD COMMISSION

AGENDA
CAPE COD COMMISSION

Thursday, June 24, 2010
3:00 p.m.

First District Court House • Chamber of the Assembly of Delegates
Route 6A, Barnstable, MA 02630

3:00 p.m.

- Roll Call
- Public Comment
- Executive Director's Report
- Minutes: 5/13/10 & 5/13/10 CCC training session
- Public Hearing: Barnstable Municipal Airport Terminal Access & Egress Design Final Hearing/Draft Decision (continued from June 10, 2010) — Page Czepiga
- Comprehensive Economic Development Strategy Report — Leslie Richardson
- Other Business
- CCC Member Comments
- Adjourn

Appendix 2: Regional Priority Project Implementation Plans

Priority Number	BC - 003

Priority Project Implementation Plan

Project Title	**Coastal Use Templates for Economic Development**

Project Definition – What & Why

Project Type	Planning
Project Goal	Project goal: Complete thorough analysis of coastal land uses and regulations from the perspective of economic development and economic impact on the rest of the Region's economy. Develop a series of land use and regulatory templates for different types of areas along the Cape Cod coastline and support their implementation locally. Long-term goal: A vibrant coastal economy that leverages the summer season to provide employment and business opportunities year-round, and re-enforces, and in some cases re-establishes, the Cape's historic connections to the sea.
Short Description	
Policy Context	Concern that the Cape does not capitalize enough on coastal assets for economic development and that current development and use patterns may be restricting future economic opportunities associated with our coastal geography
Overall Project Benefits	Increase jobs associated with coastal dependent activities while protecting the long-term sustainability of our coastal assets and coastal environment
Area of Impact	Region-wide
Target Population	Residents & Visitors

Project Team - Who

Lead Organization (Sponsor)	Cape Cod Commission

Partner Organizations	▪ APCC Business Roundtable ▪ Cape Cod Economic Development Council ▪ Regional and Local Chambers of Commerce, ▪ Harbor Masters, Shellfish Wardens, and municipalities; ▪ Woods Hole Oceanographic Institute, Marine Biological Laboratory, and other related private and public marine sciences organizations; ▪ Business owners and residential property owners located on or economically tied to the coastline and local waters.
Principle Researcher (Manager)	Andy Walsh
Research Team	Cape Cod Commission Staff ▪ Economic Development: Sandra Perez, Leslie Richardson, Dan Dray ▪ Land Use: Sharon Rooney ▪ Natural Resource Planning: Andy Walsh, Heather McElroy ▪
	Other Organization Staff ▪ Town of Barnstable: ▪ Business Roundtable/APCC:
CCC-ED Coordinator (Expediter)	Sandra Perez
Advisory Board	CC Business Roundtable

Project Schedule – What & When

Duration	Years 1 & 2
Project Plan	Clear goals, deliverable, and methodology: April 2010
Phase 1	Identification of conflicts & opportunities: baseline land use, resources
Phase 2	Compile best practices
Phase 3	Prepare model by-laws
Phase 4	Outline regional recommendations

Project Methodology - How

Study Area(s)	Region-wide (with case studies of particular locations)
Research Questions	1. Which industry sectors on Cape Cod are dependent on access to the coastline and the sea and thereby constitute the Cape's coastal economy? 2. What elements of the coastal ecology (natural infrastructure) are necessary for these (and other) economic activities to prosper? 3. Where are there conflicts between the coastal economy and specific land uses or regulations?
Research Methods	1. Mapping existing resources 2. Estimate public savings associated with the use of natural infrastructure vs. man made infrastructure
Deliverables	1. Best Practices Report 2. Model by-laws 3. Recommendations for regional actions

Risk & Stakeholder Management

Risks to Project	Too general and all encompassing
Contingency Plans	Morph into Coastal DCPC

Stakeholders Table

Stakeholder Name	**Interest in Project or Outcome**	**Engagement Approach**	**Concerns**
PN1			
Roundtable			

Budget & Non-staff Resources Needed

Total Cost		Public Share:	Private Share:

Quality Assurance & Performance Standards

<table>
<tr><td rowspan="2">Job Impact</td><td>Jobs Created</td></tr>
<tr><td>Jobs Retained</td></tr>
<tr><td rowspan="2">Measures of Success</td><td>Quantitative Measures (minimum of 3)

Immediate-term Process Measures:
✯ Number of people involved in the public planning process
✯ Representation of participants relative to demographic mix of Cape Cod and the regional economy
✯ Adoption of Recommendations

Long-term Impact Measures:
✯ Ecological integrity of coastal resources
✯ Miles of coast open to public access; number of public landings and beaches for recreational use
✯ Miles of natural coastal infrastructure (marshes, estuaries, etc) protected from development or increased development
✯ Number of harbors hosting local fin and shell fishing fleets; percent of catch processed locally
Gross square feet of residential and commercial within flood hazard zones over time</td></tr>
<tr><td>Qualitative Measures (minimum of 3)

Immediate-term Process Measures:
✯ Completion of each project phase</td></tr>
</table>

EDA Key Questions

How will this project serve one or more economically distressed populations?
Fishermen

How will this project improve competition within the region?
Hotels ability to upgrade facilities; value added opportunities

How will this project improve the region's competitive position in the global economy?
Improved or more marine sciences, fishing, and tourism product

How will this project support innovation and entrepreneurship in the region?
Not directly

What products or services will be exported out of the region as a result of this project?
Not as a direct result

How will this project increase the availability of clean energy?
Not directly

How will this project decrease demand for fossil fuels?
Not directly

Document Change Activity

The following is a record of the changes that have occurred on this document since originally drafted

Version #	Change Description	Author	Rev. Date
1.0	Transferred Summary Info and began adding detail	LR	1/19/10
2.0	Added Andy Walsh edits	ST	2/11/10

Priority Number	WD - 003

Priority Project Implementation Plan

Project Title	Entrepreneurship Capital Access and Training

Project Definition – What & Why

Project Type	Planning
Project Goal	To improve how entrepreneurial services are coordinated across numerous service providers and to both improve and expand specific services so that early-stage businesses can more easily access the help that they need, with a particular focus on those businesses having long-term growth and job creation potential.
Short Description	The project will incorporate a number of program elements: ➢ A central web site will describe the types of assistance that are available and provide guidance for entrepreneurs seeking specialized forms of assistance; ➢ A Connectivity Team will solicit and screen applications for assistance from worthy entrepreneurs. Selected entrepreneurs will enter a formal program of assistance, designed by a small team of mentors, tailored specifically to the applicants needs; ➢ A yearly or semi-annually community-supported business plan competition; ➢ Creation of new sources of financing to comlement existing sources of business financing; ➢ Pursuit of innovative partnerships with industry, academia, non-profits and public agencies;
Policy Context	Opportunities for nurturing early-stage businesses and capitalizing on economic development opportunities in clusters such as marine science and technology, clean tech, environmental science and technology, information technology, financial services, hospitality and bio-medical are not being fully met by the current fragmented approach to entrepreneurial assistance. Consequently, regional benefits such as increased competitiveness, an increase in the number of livable-income jobs, and a more diverse economy are not being realized.
Overall Project Benefits	An increase in the number of livable-income jobs in the region; More exported products and services leading to an increase in traded dollars; Innovative partnerships that leverage the assets and resources of the region; Creation of a culture of knowledge-based entrepreneurship leading to a more diverse and sustainable regional economy;
Area of Impact	Region-wide

Target Population	Entrepreneurs

Project Team - Who

Lead Organization (Sponsor)	Cape Cod Chamber of Commerce
Partner Organizations	Coastal Community Capital (CCC) Cape and Islands Workforce Investment Board (CIWIB) Cape Cod Technology Council (CCTC) Community Development Partnership (CDP) Regional Technology Development Corporation (RTDC) Cape Cod Economic Development Council (Barnstable County) Cape Cod Commission (Barnstable County) Cape Cod Community College SCORE SBA Small Business Development Center Commonwealth of Massachusetts Business Resource Team
Principle Researcher (Manager)	Wendy Northcross
Research Team	Cape Cod Commission Staff Dan Dray
	Other Organization Staff David Augustinho, CIWIB Elizabeth Bridgewater, CDP Bob Curtis, RTDC Peter Karlson, CCTC Jeannine Marshall, CCC
CCC-ED Coordinator (Expediter)	Dan Dray

Project Schedule – What & When

Duration	Years 1-2
Project Plan	Clear goals, year 1 work plan: May 2010
Phase 1	➢ Design Connectivity Team Program. Initiate program with top contestants from Entrepreneurs' Weekend II. ➢ Develop a list of successful business owners willing to either volunteer as members of a Connectivity Team or to sponsor a start-up businesses (mentor role). ➢ Establish Connectivity Teams (as needed) consisting of 4-5 individuals to work with selected entrepreneurs for the purpose of refining their business/expansion plan, securing financing, and implementing their idea. ➢ Develop a coordinated reporting mechanism that captures important

	entrepreneurial training/assistance outcomes from several service providers. ➢ Enhance EW2 follow-up activities with new program components. Establish EW2 winner milestones as goals for these activities. Coordinate among providers as necessary. ➢ Keep EW2 winner's business ideas alive throughout the year with various information/press releases.
Phase 2	➢ Develop an interactive, i.e. user-driven, Web-based Event Calendar and User Forum using readily available Web design software such as Joomla or WordPress. Use the site to list all Cape-based programs/events for entrepreneurs. List qualified consultants/services. Use social media to drive users to the Web site. ➢ Develop an assessment mechanism to apply as part of the existing triage system to identify which businesses are most likely to succeed and create livable-income jobs, eg. non-vertical businesses, small footprint, can be nurtured over the Internet, can benefit from regional infrastructure in Economic Centers and the new OpenCape broadband network. ➢ Explore the creation of new local sources of financing to complement existing sources targeted to preferred businesses based on triage system. ➢ Contact Babson College and explore possible partnership for entrepreneurial training.
Phase 3	
Phase 4	

Project Methodology - How

Study Area(s)	
Research Questions	What elements of other entrepreneurial assistance programs and business plan competitions should be incorporated in the project? What types of entrepreneurs and businesses should the project target? How should the assessment mechanism be designed to identify targeted groups. Within the targeted group what triage criteria should be applied for focusing program resouces? What selection criteria should be used to accept applicants into the Connectivity Team component? What is the design of the Connectivity Team component, i.e. what forms of assistance will it offer? What partners should we target and what partnership resources should we obtain/design?

Research Methods	Internet searches, discussions with partners, focus group sessions with entrepreneurs, discussions with Connectivity Team and project team
Deliverables	Connectivity Team Program Assessment and triage mechanism to identify businesses having strong potential for success and livable-income job creation. Year-round set of follow-up activities to EW2 Web-based interactive calendar and user forum Collaborative Model of providing services working with partners

Risk & Stakeholder Management

Risks to Project	Lack of funding Lack of successful coordination among many different players.
Contingency Plans	

Stakeholders Table			
Stakeholder Name	**Interest in Project or Outcome**	**Engagement Approach**	**Concerns**
Cape Cod Chamber of Commerce			
WIB			
RTDC			
Coastal Community Capital			
CCTC			
SCORE			
Cape Cod Community College			

Stakeholder Grid (place stakeholders in appropriate quadrant)	
High Influence	Driving
Low Influence	Restraining

Budget & Non-staff Resources Needed

Total Cost		Public Share:	Private Share:

Quality Assurance & Performance Standards

Job Impact	Jobs Created	
	Jobs Retained	
Measures of Success	Quantitative Measures (minimum of 3)	
	Qualitative Measures (minimum of 3)	

EDA Key Questions

How will this project serve one or more economically distressed populations?
Individuals who make up distressed populations fill jobs created through entrepreneurship. Career ladders become available to these individuals through on-the-job training, education and special skill building programs.

How will this project improve competition within the region?
Overall, this program will stimulate further small business entrepreneurship as well as the creation of technology companies that will compete for skilled workers and customers both in local and global markets.

How will this project improve the region's competitive position in the global economy?
Successful entrepreneurship and job creation in targeted industries—particularly those involving knowledge-based industries—increase the Cape's overall competitiveness by enhancing the quality of the Cape's workforce, stimulating business innovation in related areas of commerce, and galvanizing critical masses of industry players around products and services that strengthen competitiveness.

How will this project support innovation and entrepreneurship in the region?
Expanding entrepreneurial assistance and training, enhancing and improving coordination of services, establishing new sources of business financing, targeting services towards businesses that spearhead innovation, and establishing partnerships with industry, academia, non-profits and public agencies will create an accessible, user-friendly, coordinated pathway to business start-up and expansion.

What products or services will be exported out of the region as a result of this project?
It is anticipated that the businesses established and technologies commercialized with the assistance of this project will serve markets around the world; the project will also generate intellectual capital likely to be in demand outside the region.

How will this project increase the availability of clean energy?
NA

How will this project decrease demand for fossil fuels?
NA

Document Change Activity

The following is a record of the changes that have occurred on this document since originally drafted

Version #	Change Description	Author	Rev. Date

Priority Number	BC - 001

Priority Project Implementation Plan

Project Title	Development in Economic Centers Cost Analysis

Project Definition – What & Why

Type of Project	Planning (Construction – Planning – Technical Assistance)
Goal of the Project	Phase 1: Identify sources of cost differences involving development and redevelopment in designated growth centers compared to areas outside growth center. Phase 2: Identify and adopt incentives to drive more development to designated growth centers.
Short Description	The Cape Cod Regional Policy Plan calls for new growth to be located “in areas that are adequately supported by infrastructure and away from areas that must be protected for ecological, historical, or other reasons.” The Plan has adopted a Regional Land Use Vision Map that identifies growth areas and resource protection areas. Unfortunately, it is generally considered more expensive to comply with this policy and the Land Use Vision Map than not complying.
Overall Project Benefits	Successfully channeling growth to town centers served by the necessary infrastructure and mitigating the environmental impacts of development has a number of economic benefits to both the private and public sectors: ➢ Improved efficiencies in public transit system stimulated by higher-density development in economic centers; ➢ Reduction of sprawl and more efficient use of land; ➢ Equitable distribution of the costs of infrastructure on a per unit basis; ➢ Reduced transportation costs per person due to more walkable communities; ➢ Taxation policies that create greater cost equity between land targeted for high-density development and that targeted for low-density development. ➢ Zoning policies that favor high-density mixed-use development in economic centers; ➢ Improved community character through a reduction in sprawl and its attendant preservation of open space, an increase in interesting mixed-use development in economic centers, and an increase in human interaction and sense of community;
Area of Impact	Regional
Target Population	Policy makers, public administrators, planners, developers, construction financing institutions, private investors, business community

Project Team – Who

Lead Organization	Cape Cod Economic Development Council	
Partner Organizations	✯ Cape Cod Commission, ✯ Association to Preserve Cape Cod – Business Roundtable ✯ Cape Cod Chamber of Commerce & ✯ Local Chambers of Commerce ✯ Home Builders and Remodelers Association of Cape Cod ✯ Cape Cod & Islands Association of Realtors	
CCC Coordinator	Dan Dray, Cape Cod Commission	
Principle Researcher	Dan Dray, Cape Cod Commission	
Research Team	Leslie Richardson, Cape Cod Commission Sharon Rooney, Cape Cod Commission Martha Hevenor, Cape Cod Commission	

Project Schedule – What & When

Duration	2009 – 2011
Project Plan	➢ Assemble project team ➢ Conduct literature search focusing on the costs of sprawl and past and present models of development and determine primary research themes/topics. ➢ Collect data/information from primary and secondary sources. Use interviews, questionnaires, and focus groups to collect information about how decisions concerning development and redevelopment are made in this region.
Phase 1	➢ Analyze data and identify main determinants of development and redevelopment decisions for commercial, residential and mixed-use projects on Cape Cod.
Phase 2	➢ Develop recommendations for incentives that can help drive more development and redevelopment to designated growth areas.
Phase 3	➢ Begin to educate the target audience about the findings of this study and encourage adoption of incentives.
Phase 4	

Project Methodology – How

Study Areas	Yarmouth Rt. 28; Hyannis Downtown; Sandwich (Greenfield development) –OR – REGION-WIDE STUDY

Research Questions	The questions to be investigated by this study include but are not limited to: 1. What is the cost comparison between low-density development and redevelopment along main arterials on Cape Cod or higher-density projects within designated economic centers? 2. How much do direct, non-regulatory development/redevelopment costs vary between designated growth centers and outlying areas? 3. Are regulatory costs the same in both locations? If not, how do they differ? 4. Are infrastructure costs the same in both locations? If not, how do they differ? 5. Are there specific aspects of the development process that make mixed-use, multi-story development more expensive than single story, single use buildings outside of costs associated with location? 6. How do these up-front costs compare to potential long-term use and maintenance costs associated with the two types of development? 7. How are project location decisions affected by the expectations of the construction financing community? 8. What role does zoning and cost of land play in project decisions? 9. What are the drawbacks from a developer's point-of-view between high-density development and low-density development? 10. What is the role of transportation and pedestrian flow in location decisions?
Research Methods	This research and planning project seeks in Phase 1 to understand the specific sources of a presumed cost imbalance—both public and private—between low-density and high-density development and in Phase 2 to identify public policy changes that can recalibrate development costs to favor areas designated for growth. Phase 1: Data/Information Collection ➢ Identify specific planning/development-related research topics warranting study using a literature search to develop a historical context for the study, CEDS Business Climate Working Group discussions, and research team knowledge; ➢ Identify study locations and research history of development in these areas using literature searches and interviews; ➢ Survey a sample of businesses—both owner-occupied and leasees—within study areas regarding their choice to locate there: consider costs factors as well as non-cost factors; ➢ Survey developers recently completing or currently engaged in projects in the study areas to illuminate private costs: consider cost as well as non-cost factors; ➢ Survey selected municipal officials to illuminate public costs and policies that affect development location decisions; ➢ Evaluate land and infrastructure requirements and costs in the study areas. Phase 2: Analysis ➢ Analyze data/information to develop a thorough understanding about the previously selected research topics; ➢ Identify any additional data/information that needs to be collected; ➢ Clearly separate costs factors from equally important non-cost factors that influence development location choices; Phase 3: Recommendations ➢ Identify policy changes and economic incentives that could be employed at the state, regional and local levels to reduce the cost of development and

	redevelopment in designated economic centers; ➢ Identify policy changes to increase costs of development outside economic centers so that they reflect the true direct and hidden costs per unit of low-density development as compared to high-density development; ➢ Design and conduct a public planning process to gather ideas and focus in on those ideas deemed most effective and achievable. Phase 4: Action/Implementation ➢ Later phases of this project would focus on adopting the recommended changes and evaluating their impact.

Risk & Stakeholder Management

Risks to Project	Lack of funding Lack of successful coordination among many different players.
Contingency Plans	

Stakeholders Table			
Stakeholder Name	**Interest in Project or Outcome**	**Engagement Approach**	**Concerns**

Stakeholder Grid (place stakeholders in appropriate quadrant)	
High Influence	Driving
Low Influence	Restraining

Budget & Non-staff Resources Needed

Total Cost		Public Share:	Private Share:

Quality Assurance & Performance Standards

<table>
<tr><td rowspan="2">Job Impact</td><td>Jobs Created</td><td></td></tr>
<tr><td>Jobs Retained</td><td></td></tr>
<tr><td rowspan="2">Measures of Success</td><td>Quantitative Measures (minimum of 3)</td><td>QUANTITATIVE
Immediate-term Process Measures:
➢ Completion of Analyses
➢ Public Participation Activities
➢ Options Developed
➢ Options Adopted/Changes Made
Long-term Impact Measures:
➢ Number of development or redevelopment project within economic centers
➢ Number of development or redevelopment project outside economic centers</td></tr>
<tr><td>Qualitative Measures (minimum of 3)</td><td>QUALITATIVE
Immediate-term Process Measures:
➢ Positive Press Coverage
➢ Willingness to Participate and Support for the Process
Long-term Impact Measures:
➢ Number of development or redevelopment project within economic centers
➢ Number of development or redevelopment project outside economic centers</td></tr>
</table>

EDA Key Questions

➢ **How will this project serve one or more economically distressed populations?**
➢ Increasing density in town centers will increase the share of jobs and housing that are centrally located thus make it possible for more people to walk between home and work and to drive less. Greater density will also increase public transit options. The lower public costs associated with higher density will reduce the tax burden, with the greatest benefit to those with the least income. The viability of affordable housing close to neighborhood retail and services would increase as well.

➢ **How will this project improve competition within the region?**
Greater density in economic centers will create more vibrant downtowns through a mixture of housing choices and interesting mixed-use development and redevelopment projects that create walkable environments. Vibrant downtowns are essential advantages for the Cape in attracting entrepreneurs, skilled workers, mobile professionals, and businesses. This project will preserve the natural beauty, health, and historic character of Cape Cod, which are the foundation of its largest single industry: tourism.

How will this project improve the region's competitive position in the global economy?
Creating higher-density economic centers will appeal to innovators and entrepreneurs in knowledge-based fields of endeavor (see below) which, in turn, will increase the region's competitive position.

How will this project support innovation and entrepreneurship in the region?
Research has demonstrated that vibrant walkable mixed-use downtowns attract innovators and entrepreneurs. The critical mass of activity created by greater density, i.e. restaurants, cafes, retail stores, libraries, museums, etc. appeals to members of the creative class as defined by Richard Florida in his book The Rise of the Creative Class. These types of highly educated individuals consider high-density development to be an asset.

What products or services will be exported out of the region as a result of this project?
Tourism is an export industry in that it draws money into the region through the sale of a product, the only difference being that the product is the place. If this project can result in vibrant town centers that complement the region's historic assets and a healthy natural environment, Cape Cod will continue to attract, and possibly increase tourism dollars.

How will this project increase the availability of clean energy?

How will this project decrease demand for fossil fuels?
Higher-density leads to more energy efficient buildings. Density also leads to more walkable built environments which reduces dependency on automobiles

Document Change Activity

The following is a record of the changes that have occurred on this document since originally drafted

#	Change Description	Author	Date

Priority Number	ID -003

Priority Project Implementation Plan

Project Title	Renewable Energy Generation

Project Definition – What & Why

Project Type	Planning
Project Goal	To position Cape Cod as a leader in offshore renewable energy science, technology, and generation by supporting the development of 1) a bio-fuel refinery using low light, cold climate, saltwater algae as feedstock, and 2) offshore wind, tidal, and wave energy resources in ways that maximize benefits and minimize adverse impacts in local communities.
Short Description	This project seeks to capitalize on Cape Cod's capacity for bio-fuel production and offshore renewable energy generation using the region's wind, tidal and wave resources in combination with regionally located resources in marine science and technology research. The project relates directly to a broad variety of regional objectives encompassing economic and workforce development, regional carbon footprint, climate change, energy independence, community benefit, and state and federal goals and policies including those embodied in the new Massachusetts Ocean Management Plan. The overarching goal is to create regional benefits from the economic and workforce development opportunities offered by the emerging offshore renewable energy industry and the bio-fuels industry.
Policy Context	A renewed global focus on energy independence and sustainable, environmentally friendly energy sources has made areas with strong wind, tidal and wave resources such as Cape Cod prime targets for the expansion of ocean energy development. This imperative for ocean energy development is rich with economic development and workforce development opportunities that could establish Cape Cod as a leader in offshore energy development. As a prelude to this development, a dialogue between stakeholders must be facilitated to ensure an effective planning framework is established incorporating the process, policies and regulations needed to guarantee appropriate scale ocean energy development in the ocean waters around Cape Cod.
Overall Project Benefits	➢ An effective planning framework to guide appropriate scale offshore renewable energy development; ➢ Offshore renewable energy development that honors and protects the interests of local communities and stakeholder groups; ➢ Engagement of stakeholder groups in siting, planning, implementation and operation of offshore renewable energy projects; ➢ A siting and planning process that is inclusive, comprehensive, and transparent, designed and implemented at the local level;

	➢ Balancing of anticipated benefits and rewards with potential adverse impacts and risks, in order to maximize community benefit and minimize negative but unavoidable impacts; ➢ The creation of partnerships with citizen and advocacy groups, as well as business, energy, research, education, workforce training, and economic development organizations, in order to maximize public involvement, nurture institutional synergies, and leverage existing assets. ➢ A planning framework resulting in the development of projects that stimulate economic activity and create jobs for local residents in construction, operations, maintenance, environmental monitoring, and research and development; ➢ A planning framework that catalyzes entrepreneurial activity, induces additional public-private investment, and leads to the export of knowledge and technologies; ➢ A planning framework that supports local and regional resource management and economic development plans, as well as state and federal energy, climate, and ocean management objectives; ➢ A planning framework that leads to projects that takes advantage of existing port facilities and draws upon local businesses and institutions with expertise in marine services, science, and technology;
Area of Impact	All of the ocean waters surrounding Cape Cod and all fifteen municipalities that constitute Barnstable County.
Target Population	

Project Team - Who

Lead Organization (Sponsor)	Cape Cod Commission of Barnstable County
Partner Organizations	Suggested: UMass-Dartmouth Marine Renewable Energy Center UMass-Amherst Wind Energy Center Cape Light Compact/Cape and Vineyard Electric Cooperative Vineyard Energy Project Martha's Vineyard Commission CIRenew Cape and Island Self-Reliance Corporation Cape Cod National Seashore Woods Hole Oceanographic Institute Massachusetts Clean Energy Center Massachusetts Department of Energy Resources South Coast Development Partnership EOEEA Center for Coastal Studies NStar ISO-New England Marine and Ocean Technology Network member(s) Municipal energy committee members Wampanoag Tribal Council

Principle Researcher (Manager)	Phase 1: Heather McElroy – DCPC Phase 2-4: to be determined
Research Team	Cape Cod Commission Staff Ryan Christenberry, Dan Dray, Heather McElroy, Sandra Perez, Leslie Richardson, Sharon Rooney, Andy Walsh
	Other Organization Staff To be determined
CCC-ED Coordinator (Expediter)	

Project Schedule – What & When

Duration	A multi-phase project unfolding over the course of five years.
Project Plan	Evolving
Phase 1	Commences and concludes in Year One: Implementation of a District of Critical Planning Concern for 521,552.3 acres of open water encompassing all of the state waters from .30 mile from Mean High Water (MHW) around Barnstable County and extending to 3 nautical miles from MHS, or the state jurisdictional boundary, whichever is further from shore. The objective of the District is to ensure protection of the goals and interests listed in Section 6(c) of the DCPC Designation Decision. The DCPC will give the County, towns and stakeholders one year from the date of designation to develop a planning framework that will guide the development of appropriate scale offshore renewable energy in the ocean waters surrounding Cape Cod. Tasks: ➢ Convene committees to lead the DCPC public process. Committees will be comprised of individuals who collectively can contribute multidisciplinary expertise encompassing the following topics: ➢ the science and engineering behind wave, tidal and wind technologies; ➢ research, development, demonstration and deployment of offshore RE projects; ➢ infrastructure needs of offshore RE development including the role of the regional electrical grid; ➢ technical and financial viability of RE projects; ➢ site assessment including an understanding of leasing and operating revenues; ➢ state RE energy generation goals, policies and regulations affecting offshore development; ➢ drivers of offshore development including state and federal goals, policies and incentives; ➢ market mechanisms and competitiveness issues affecting offshore development; ➢ localized economic development benefits; ➢ localized workforce development benefits; ➢ potential community benefits; ➢ cultural heritage;

	➢ natural resource protection; ➢ ocean geology; ➢ fisheries; ➢ the role of public sector planning and regulation in the design of major infrastructure projects; ➢ a detailed understanding of the MOMP; ➢ a detailed understanding of state policies governing the collection of generation and transmission revenues collected from projects in state water and their application to community benefit; ➢ climate change/adaptation goals and policies; ➢ DCPC Committee will design a broad-based community planning process involving stakeholders, public officials and the general public that leads to the creation of a planning framework for appropriate scale ocean energy development that maximizes community benefit and minimizes adverse impacts. The work of the committee will follow the Guidelines (Section 7) in the DCPC Decision document;
Phase 2	Once the DCPC has been finalized, the following activities will be undertaken: ➢ An Economic Development (ED) Committee (to be determined) will design and implement a process focused exclusively on defining specific economic development and workforce opportunities inherent in ocean energy development; ➢ ED Committee will use meetings, charretts, surveys and other forms of communications to examine specific types of appropriate scale ocean energy technologies and the technical capabilities and job skills required for installing, operating, testing, and maintaining them; ➢ ED Committee will also examine related economic development opportunities in areas such as technology development, marine services, power purchasing, project ownership, R&D and electrification; ➢ ED Committee will begin formalizing partnerships with academic and scientific institutions actively engaged in the study and deployment of ocean energy along the coast of Cape Cod and southeastern Massachusetts; ➢ In all of its work the committee will strive to build public acceptance for appropriate scale ocean energy technologies.
Phase 3	➢ examine siting opportunities in state waters for specific types of ocean energy projects and support the pre-development of testing and demonstration projects in the waters; ➢ support the installation of appropriate scale ocean energy projects in state waters based on the planning and regulatory framework defined by the DCPC process in Phase 1; ➢ research and design specific workforce education and training programs focusing on ocean energy technologies; ➢ formalize partnerships begun in Phase 1 for the purpose of catalyzing testing and demonstration projects in state waters;
Phase 4	➢ ED Committee and its partners will assist the implementation of specific testing and demonstration projects in state waters by performing a coordinating role involving data, information, education and training, public outreach, and advocacy etc. ➢ Conceptually plan for the installation of visitor exhibits and facilities highlighting ocean energy development;

Project Methodology - How

Study Area(s)	
Research Questions	
Research Methods	
Deliverables	

Risk & Stakeholder Management

Risks to Project	
Contingency Plans	

Stakeholders Table			
Stakeholder Name	**Interest in Project or Outcome**	**Engagement Approach**	**Concerns**

Stakeholder Grid (place stakeholders in appropriate quadrant)	
High Influence	Driving
Low Influence	Restraining

Budget & Non-staff Resources

Total Cost		Public Share:	Private Share:

Quality Assurance & Performance Standards

Job Impact	Jobs Created	
	Jobs Retained	
Measures of Success	Quantitative Measures (minimum of 3)	
	Qualitative Measures (minimum of 3)	

EDA Key Questions

How will this project serve one or more economically distressed populations?

How will this project improve competition within the region?

How will this project improve the region's competitive position in the global economy?

How will this project support innovation and entrepreneurship in the region?

What products or services will be exported out of the region as a result of this project?

How will this project increase the availability of clean energy?

How will this project decrease demand for fossil fuels?

Document Change Activity

The following is a record of the changes that have occurred on this document since originally drafted

Version #	Change Description	Author	Rev. Date

Priority Number	BD - 001

Priority Project Implementation Plan

Project Title	**Buy Local Infrastructure**

Project Definition – What & Why

Project Type	Planning
Project Goal	Retain and attract wealth to the regional economy through projects that promote the purchase of locally available goods and services.
Short Description	This multi-pronged project will use a variety of methods to encourage consumers to spend their dollars in locally-owned stores and businesses. Using a combination of smart marketing techniques, consumer education, financial incentives, social media messages, and technology-based platforms this project will stimulate consumers to buy local. Unlike some buy local projects which focus solely on agricultural goods, this project will focus on all types of local businesses. The program focuses on making capital investments that will facilitate the exchange of local goods, creation of value added activities, and the development of goods and services locally that are currently unavailable or imported.
Policy Context	The customer base of locally owned businesses continues to erode due a shift in consumer spending away from local businesses to national chain stores. Consumers unwittingly aid this process by assuming that chain stores offer the best value for their pocket books. A concerted effort to direct more spending towards locally owned businesses will increase the number of dollars that remain and circulate within the regional economy and help Cape Cod to re-establish a local living economy.
Overall Project Benefits	➢ Increase in money spent and retained from purchases made on Cape Cod ➢ Reduced need for imported products and services ➢ Enhanced marketing and branding for locally-owned businesses ➢ Increased public awareness of the economic value of buying locally ➢ Strengthen and leverage the food growing resources and income of agricultural producers on Cape Cod ➢ Encourage owners of small parcels of agricultural land to begin producing niche market agricultural products or to lease their land to 3rd party growers. ➢ Identified opportunities for Cape businesses to fill gaps or substitute for imports ➢ Increased sense of community and regional self-reliance among business owners and their patrons ➢ Increase in the number of triple bottom line businesses ➢ Preservation of family-owned businesses ➢ Increase in investor interest in local businesses

	➢ Creation of public policies that favor locally-owned businesses
Area of Impact	Barnstable County
Target Population	Residents and visitors, businesses

Project Team – Who

Lead Organization (Sponsor)	Community Development Partnership
Partner Organizations	Cape Cod Commission Cape Cod Cooperative Extension – Bill Clark Sandwich Chamber of Commerce – Kate Bavelock Hyannis Main Street BID – Elizabeth Wurfbain and Amanda Converse Cape Cod Commercial Hook Fishermen's Association – Sue Nickerson
Principle Researcher (Manager)	Dan Dray
Research Team	Cape Cod Commission Staff Economic Development: Sandra Perez, Leslie Richardson Partners: All project team members
	Other Organization Staff
CCC-ED Coordinator (Expediter)	Dan Dray

Project Schedule – What & When

Duration	
Project Plan	

Phase 1	➢ Build collaborative support for the project among the handful of buy local organizations that already exist on Cape Cod and develop a regional buy local strategy that preserves the uniqueness of the Cape's existing buy local programs, enhances their reach and effectiveness, fills in thematic gaps with suitable program content, and offers communication tools and activities that promote the importance of buying locally. ➢ Reach consensus with existing groups on common goals and activities that advance regional buy local efforts. A 10 percent shift campaign and the national "3/50 Project" for instance exemplify goals that can be used to unify geographically disparate buy local initiatives. Research best practices from across the country—taking advantage of knowledge gained by national buy local groups such as FoodRoutes, BALLE, Insititute for Local Self Reliance, etc.—and incorporate in regional strategy. ➢ Begin developing a five-step Logic Model (Needs Assessment, Design, Develop, Implement and Evaluate) to guide the trajectory of this project.
Phase 2	➢ Research whether procurement policies among municipalities and large institutions on Cape Cod include local buying and determine ways to expand local buying as part of procurement practices. ➢ Research how Geographical Information System data that captures the location and character of selected businesses, e.g. restaurants that offer dishes with local ingredients, can be applied to cell phone and PDA platforms. If this proves practical and project funding can be located, begin to implement the system.
Phase 3	➢ If funding can be located, expand the GIS system to include a broader array of local businesses.
Phase 4	

Project Methodology – How

Study Area(s)	
Research Questions	
Research Methods	
Deliverables	

Risk & Stakeholder Management

Risks to Project	➢ Lack of funding sources. ➢ Challenges that all multi-partner initiatives face such as commitments of staff and other resources, agreement on common agenda, shifting priorities within partner organizations.
Contingency Plans	

Stakeholders Table			
Stakeholder Name	**Interest in Project or Outcome**	**Engagement Approach**	**Concerns**

Stakeholder Grid (place stakeholders in appropriate quadrant)	
High Influence	Driving
Low Influence	Restraining

Budget & Non-staff Resources

Total Cost		Public Share:	Private Share:

Quality Assurance & Performance Standards

Job Impact	Jobs Created	
	Jobs Retained	
Measures of Success	Quantitative Measures (minimum of 3)	
	Qualitative Measures (minimum of 3)	

EDA Key Questions

How will this project serve one or more economically distressed populations?
Cape Cod is served primarily by small businesses. Ninety-percent of all businesses on Cape Cod have less than 20 employees. These businesses are the life-blood of the region. They provide thousands of jobs for Cape Cod residents and stimulate a culture of entrepreneurship from one generation to the next. One of their most important functions is to stimulate Cape Cod's economy by receiving and re-circulating money. These businesses and the individuals, families and partners that own them are increasingly threatened by the growth of national chain stores. By increasing expenditures on local purchases we can keep this small business community robust and viable.

How will this project improve competition within the region? As increasing numbers of Cape Codders indicate a willingness to shop locally, small businesses will need to increase their competitiveness if they want to attract shoppers into their stores and businesses.

How will this project improve the region's competitive position in the global economy?

How will this project support innovation and entrepreneurship in the region?
As businesses become aware of new opportunities for growth as a result of increased local buying they will be willing to invest more in their businesses, e.g. new products, new buildings, improvements in technology, etc.

What products or services will be exported out of the region as a result of this project?

How will this project increase the availability of clean energy?

How will this project decrease demand for fossil fuels?

Document Change Activity

The following is a record of the changes that have occurred on this document since originally drafted

Version #	Change Description	Author	Rev. Date

Priority Number	WD - 002

Priority Project Implementation Plan

Project Title	Renewable Energy Technology Testing and Training Center

Project Definition – What and Why

Project Type	Planning
Project Goal	To establish Cape Cod as a high caliber center for renewable energy testing and training, thereby capitalizing on the wind, water, and other natural assets of the region in order to educate a highly qualified workforce and test equipment to operate in the rugged weather of New England.
Short Description	One of the main areas of focus for this project is researching the feasibility of establishing a small to mid-scale wind testing facility on the Cape; included in the are of focus is other renewable energy technology testing and training opportunities to help grow the local workforce to meet the needs of the growing renewable energy industry in New England. Project A: Small and Mid-Scale Wind Testing Facility with sub-category of Operations and Maintenance training The purpose of this specific renewable energy testing project is to provide 3rd party testing site in a robust wind regime for wind turbines up to 600 kilowatts in scale. Proposed project could be sited at the Massachusetts Military Reservation, or the National Park's Highland Center. Self-Reliance owns a meteorological tower that is installed at the MMR and has been measuring the wind. Office/lab space could be placed on site, at the Massachusetts Military Reservation, or elsewhere in the region. The wind testing is something that the US Dept. of Energy's National Renewable Energy Lab has expressed interest in seeing in the region and could possibly be funded through DOE. The University of Massachusetts Wind Energy Center would also be a great partner in the project since it can provide technical assistance on data collection and analysis as well as on the installation portions of work. UMASS REL has also begun their curriculum development for the first off-shore wind program in the nation. Having an established partnership with UMASS REL for the training components of this project could position the region to house portions of the field-testing and training work.. The wind technician training program could be co-developed with the Mass Maritime Academy, who could offer a certificate for the 4 semester program.

Policy Context	The policy context for this multi-faceted renewable energy project relates directly to supporting the Commonwealth's wind goal of installing 2000 megawatts of wind generation by 2020. It also supports the federal goal of having 20% of the nation's electricity come from wind by 2030.
Overall Project Benefits	This project would provide a much needed testing facility as well as many educational and professional opportunities. Having a facility and a training program like this would put our region at an advantage to attracting jobs to the Cape. By training wind technicians for on-shore and off-shore wind work, local people would have the opportunity to service land-based and future off-shore projects on the eastern seaboard.
Area of Impact	Regional
Target Population	Wind turbine manufactures are the audience for the testing hardware. Engineers, technicians, and educators are some of the other populations targeted through this work.

Project Team – Who

Lead Organization (Sponsor)	Cape & Islands Self-Reliance Corporation
Partner Organizations	Barnstable County, Cape Cod Community College, UMASS REL, Mass Maritime Academy, UMASS Dartmouth Marine Renewable Energy Center
Principle Researcher (Manager)	Megan Amsler
Research Team	Cape Cod Commission Staff Dan Dray Sandra Perez
	Other Organization Staff
CCC-ED Coordinator (Expediter)	Dan Dray

Project Schedule – What & When

Duration	On-going

Project Plan	
Phase 1 ➢ Work on developing wind technician training with Mass Maritime Academy ➢ Continue to develop wind testing facility concept with partners and monitor potential funding sources	
Phase 2	TBD
Phase 3	TBD
Phase 4	TBD

Project Methodology –How

Study Area(s)	
Research Questions	Research consists primarily of identifying viable institutional, government and private-sector partners, building collaboration, and locating funding.
Research Methods	
Deliverables	

Risk & Stakeholder Management

Risks to Project	Lack of funding. Inability to locate workable site.
Contingency Plans	

Stakeholders Table			
Stakeholder Name	**Interest in Project or Outcome**	**Engagement Approach**	**Concerns**
Land-based wind turbine owners	Looking for local wind technicians	We have begun meeting with them already	
Off-shore wind farms	Looking for trained O&M people	Plan to meet with turbine manufacturers and developers	
Small & Mid scale wind turbine manufactures	Need turbines tested	Plan to engage some manufacturers who need turbines tested in NE coastal conditions e.g. Aeronautica, Plymouth, MA	Funding

Stakeholder Grid (place stakeholders in appropriate quadrant)	
High Influence	Driving
Low Influence	Restraining

Budget & Non-Staff Resources

Total Cost	~$200,000 to get things started	Public Share: shared grant funding necessary	Private Share: TBD Testing fees from manufactures Some other sort of private support to support R&D and other technical capacities

Quality Assurance & Performance Standards

<table>
<tr><td rowspan="2">Job Impact</td><td>Jobs Created</td><td>Potential for many jobs to be created</td></tr>
<tr><td>Jobs Retained</td><td>Construction: : # TBD
In addition to potential construction jobs, the project would offer training opportunities related to the installation and maintenance of wind turbines to those currently working in the trades.
Permanent: # TBD
Types of Jobs: Data collection positions, management of the facility and its activities, technical positions relating to testing and repair of turbines, educational positions to train technicians in operations and maintenance, and other educational based services. Coordinator of academic programs and studies with universities, etc.</td></tr>
<tr><td rowspan="2">Measures of Success</td><td>Quantitative Measures (minimum of 3)</td><td>Quantitative:
➢ Overall:
  ➢ Number of jobs created
  ➢ Number of actual testing sites established
  ➢ Number of turbines tested & certified
  ➢ Number of individuals trained</td></tr>
<tr><td>Qualitative Measures (minimum of 3)</td><td>Qualitative:
  ➢ awareness of the Cape as a center of the emerging renewable energy industry.
  ➢ Cape region as hub for renewable energy technicians
  ➢ Strong collaborative process to grow the programs</td></tr>
</table>

EDA Key Questions

How will this project serve one or more economically distressed populations?

The withering construction industry is one target population that could easily make the transition into this sector. The young population of the Cape region is also at risk given the inability for most young people to find good jobs in the region. By providing good local jobs in the clean energy sector, we will be working toward increasing the pay scales for the younger workers committed to working in the field.

How will this project improve competition within the region?

This project would provide a wind testing facility east of the Mississippi. Currently, there aren't many such facilities in the US and the wind sector is growing.

How will this project improve the region's competitive position in the global economy?

Since the region has an abundance of wind energy and the global marketplace is looking to wind for obtaining a share of its electricity in the future, the Cape & Islands region has an opportunity to train workers to fulfill those jobs here and elsewhere where wind jobs are available.

How will this project support innovation and entrepreneurship in the region?
This testing facility would support innovation and entrepreneurship by offering a place to test ideas/concepts for new types of wind turbine designs, blade designs, and electrical components, such as inverters, controllers, dump loads, etc. as they interface with wind turbines under real world conditions.

What products or services will be exported out of the region as a result of this project?
As wind development grows in US there will be a need to train workforce to meet the needs of development.

How will this project increase the availability of clean energy?
There are many turbine manufacturers that guarantee high percentages of availability of their machines. Without qualified technicians on the ground, many will not sell machines to a region since they will be unable to keep that guarantee. With more machines coming on-line in the region, there is a need to reduce the down-time as much as possible and increase the availability of power. Testing turbines is another mechanism for increasing the availability of better machines on the market that will be viable in the rugged New England environment.

How will this project decrease demand for fossil fuels?
With more renewable energy systems coming on line, that will directly decrease

Document Change Activity

The following is a record of the changes that have occurred on this document since originally drafted

Version #	Change Description	Author	Rev. Date

Priority Number	BC-002

Priority Project Implementation Plan

Project Title	Redevelopment Authority

Project Definition – What & Why

Project Type	Planning
Project Goal	Project goal: Complete a feasibility analysis to identify the most appropriate tool to achieve the goals of encouraging redevelopment in designated areas and develop draft enabling legislation for regional entity with local opt-in provisions. Long-term goal: Establish vibrant centers of economic activity by supporting redevelopment and growth in the areas that have been designated for development and redevelopment, while discouraging development outside these areas.
Short Description	This planning project would assess the need for and feasibility of having a county-wide redevelopment authority or similar entity to facilitate redevelopment in areas designated for development and redevelopment through the acquisition and sale of land or property rights. Research questions include: • What organizational options exist under MA State law? • What powers will the entity need to have? Eminent domain, regulatory authority? • Will the entity need to have bonding authority? How should debt repayment be structured? Where will start-up funding come from? • What are boundaries of the authority? Should it apply only to selected areas? Should use of its authority be confined to projects endorsed at the municipal level? • Structure/makeup of authority on regional and/or local level • Identification of partners necessary for successful implementation • How to avoid duplication with existing state programs Central to this study will be assessing the feasibility of creating a Transfer of Development Rights (TDR) Bank in conjunction with the redevelopment entity discussed above or independently. The purpose would be to facilitate the shift of development potential in sensitive resource areas to those areas identified as appropriate for growth. The viability of TDR is predicated on enabling increases in growth potential only through the purchase of development rights while not creating a further disincentive (higher cost) to development within those areas designated for development and redevelopment.
Policy Context	• New development is discouraged – little land remains and environment is already over taxed • Existing strip style development detracts from the economy – better design could lead to improved access to customers, improved community character and therefore draw, and a healthier natural environment better able to absorb human impacts

Overall Project Benefits	• Reduction of blight • Compensation for property owners as development rights are shifted to those areas designated for development and redevelopment • Stimulate private investment in downtown areas • Lower public costs associated with infrastructure development to mitigate the impacts of development
Area of Impact	Region-wide
Target Population	Cape Businesses

Project Team - Who

Lead Organization (Sponsor)	APCC Business Roundtable with staffing from the Cape Cod Commission
Partner Organizations	• Association to Preserve Cape Cod • Cape Cod Commission, Cape Cod EDC, & Barnstable County • Cape Cod Regional Chamber and local chambers • Municipalities (EDICs & Econ. Dev. Committees)
Principal Researcher (Manager)	Sharon Rooney, Chief Planner
Research Team	Cape Cod Commission Staff Leslie Richardson, Marianna Sarkisyan, Jessica Wielgus, Heather McElroy, Scott Michaud (nitrogen trading), Paul Niedzwiecki
	Other Organization Staff BRT/APCC – Don Keeran, Bob Dubois (local Chamber), Jo Anne Miller Buntich
CCC-ED Coordinator (Expediter)	Responsible for Admin/reporting - Sandra

Project Schedule – What & When

Duration	July 2009 – December 2010 (Phase 1), Phase 2 – Jan. 2011 to Dec. 2011
Project Plan	
Phase 1	1) Refine project goal w/BRT/Paul; 2) Research case studies and analysis across U.S.

Phase 2	1) Report on case studies and present to BRT; 2) Outline recommendations and possible legislation with workshop hosted by BRT
Phase 3	1) Outreach – educational workshops hosted by BRT w/stakeholders; 2) prepare final report
Post-Project Next Steps	Finalize legislation and find a sponsor

Project Methodology - How

Study Area(s)	Region-wide
Research Questions	See description of project
Research Methods	Case study approach
Deliverables	Case study report Outline of required structure with draft legislation Outreach/educational workshop

Risk & Stakeholder Management

Risks to Project	Local fear of regional authority and/or regional land takings
Contingency Plans	Opt-in approach rather than opt-out?

Stakeholders Table			
Stakeholder Name	**Interest in Project or Outcome**	**Engagement Approach**	**Concerns**

Budget & Non-staff Resources Needed

Total Cost	$50,000	Public Share: $50,000	Private Share:

Quality Assurance & Performance Standards

<table>
<tr><td rowspan="2">Job Impact</td><td>Jobs Created

Permanent:
NA
Construction:
NA</td></tr>
<tr><td>Jobs Retained

NA</td></tr>
<tr><td rowspan="2">Measures of Success</td><td>Quantitative Measures (minimum of 3)

Immediate-term Process Measures:
Completion of the Analysis
Adoption of Recommendations
Long-term Impact Measures (if need for a redevelopment authority is found):
Gross square feet of blighted properties redeveloped in downtown areas
Gross square feet of new development in downtown areas designated for growth rather than in sensitive resource areas
Gross square feet of un-developed strip commercial areas outside growth areas</td></tr>
<tr><td>Qualitative Measures (minimum of 3)

Immediate-term Process Measures:
Improved coordination between county and municipal governments
Long-term Impact Measures (if need for a redevelopment authority is found):
Vibrant mixed-use downtown centers
Healthy natural resources and less conflicts between modern development and historic structures and places</td></tr>
</table>

EDA Key Questions

How will this project serve one or more economically distressed populations?
Not directly, however, increasing density in town centers will increase the share of jobs and housing that are centrally located thus reducing the need for automobiles and increasing public transit options. If successful, the lower public costs of associated with higher density will reduce the tax burden with the greatest benefit to those with the least income. The viability of affordable housing would increase as well.

How will this project improve competition within the region?
This project will preserve the natural beauty, health, as well as the historic character of Cape Cod, which are the foundation of its largest single industry: tourism. These are also essential advantages to the Cape in attracting skilled workers, mobile professionals, and businesses. The fishing (particularly shell-fishing) and marine sciences industries also depend on a health environment that is currently at risk due to sprawl development and dependence on septic systems and automobiles.

How will this project improve the region's competitive position in the global economy?

If successful, the Cape would be able to accommodate growth without undermining its natural and historic built assets that distinguish the region in the world tourism market.

How will this project support innovation and entrepreneurship in the region?

Not directly. Indirectly, innovation and entrepreneurship would be supported by reducing the cost of doing business on Cape Cod and could be stimulated if this project results in greater human interaction and a stronger sense of community.

What products or services will be exported out of the region as a result of this project?

Tourism is an export industry in that it draws money into the region through the sale of a product, the only difference being that the product is the place. If this project can result in vibrant town centers that complement the region's historic assets and a healthy natural environment, Cape Cod will continue to attract and possibly increase tourism dollars.

How will this project increase the availability of clean energy?

This project is more likely to result in greater energy efficiency and related technologies but could improve the feasibility of certain clean energy technologies or efficiently capture waste resources that could be transformed into energy.

How will this project decrease demand for fossil fuels?

If successful, this project could reduce the demand for fossil fuels over the long term. The need for automobile travel, energy, and even lawnmowers and the like will be reduced by limiting sprawl and encouraging density through development and redevelopment in town centers.

Document Change Activity

The following is a record of the changes that have occurred on this document since originally drafted

Version #	Change Description	Author	Rev. Date
1	Inserted Information from the CEDS Project Summary	Leslie	2/4/10
2	Added Information from Sharon & Leslie Meeting	Sharon	2/5/10

Priority Number	

Priority Project Implementation Plan

Project Title	**Cape Cod Fisheries Trust Capitalization**

Project Definition – What & Why

Project Type	Economic Adjustment
Project Goal	The Cape Cod Fisheries Trust responds to an environmental, social and economic crisis that is threatening ocean ecosystems, fish populations, fishermen and their communities. The mission of the Trust is to protect and restore depleted fisheries resources in order to reinvigorate fishing businesses and coastal communities. The Trust buys scallop and groundfish quota that is leased to qualifying Cape Cod fishing businesses.
Short Description	The Cape Cod Commercial Hook Fishermen's Association (CCCHFA) established the Cape Cod Fisheries Trust (CCFT), a new and innovative approach to mitigating the unintended and often overlooked social consequences of catch share implementation. To achieve this objective while protecting depleted fisheries resources and reinvigorating fishing businesses, CCFT provides affordable fishery access to local fishermen in exchange for adherence to conservation and community 'best management practices'. Specifically, the Trust is buying groundfish and scallop permits and leasing them to qualifying Cape Cod fishermen. This program is pioneering a community ownership model as a viable alternative to individual ownership programs which tend to generate unsustainable levels of debt and irrational quota pricing. In doing do, the Trust delivers a win-win-win for fishermen, community, and the environment by offering financial incentives to fishermen that are willing to adopt legally binding leasehold covenants that end overfishing, limit habitat impacts and minimize bycatch. The Trust will meet these goals through the following: 1. Acquire and retain permits which are trending to be acquired by corporate large boat fleets; 2. Provide affordable catch share access for Cape Cod fishing businesses, including "low income" fishermen. 3. Support owner-operated, independent fishermen who reside on Cape Cod. 4. Maintain local access to the fishery resources in close proximity to fishing communities. 5. Support viable plans for succession of fishing opportunities to future generations of fishermen on Cape Cod. 6. Promote standards related to the traditional principles of revenue sharing between vessel owners, skippers and crew. 7. Promote environmentally sustainable fishing practices and ocean stewardship through binding lease covenants.

	8. Establish a more robust and sustainable financial relationship between fishermen and catch shares that does not require fishermen or fisheries to take on unsustainable levels of debt. Since 2005, program operations have been supported by the Ford Foundation, Surdna Foundation, Cape Cod Economic Development Council, Jessie B Cox Charitable Trust, J.M. Kaplan Fund, Walton Foundation, Sailor's Snug Harbor and Oak Foundation. Capital contributions have been awarded by the Jane's Trust, Cape Cod Five Foundation, Dreyfus Foundation and numerous individuals. Since its inception, the Trust has raised $2.9 million towards a $10 million goal. To date, nearly all capital funding has been expended in purchasing 157,000 pounds of scallop quota and 1.4 million pounds of groundfish quota. The Trust has demonstrated unique capacity and expertise for fundraising, permit valuation, and permit market navigation. Once fully capitalized and operational, the Trust will contribute significantly to economic development and job creation on Cape Cod. In ten years, the Trust portfolio of permits and quota is expected to appreciate from $10 million to $25 million and generate a renewable annual gross revenue stream of $1 million in lease proceeds. Subsequently, these proceeds will be used to service debt, purchase additional permits and finance conservation programming at CCCHFA. CCCHFA has assembled an expert team to implement the Cape Cod Fisheries Trust. The Trust will be owned by CCCHFA and managed by the Community Development Partnership. The Community Development Partnership will review lease applications and work with fishermen to complete their business plans. Conservation Law Foundation Ventures will assist in fundraising, conduct annual report preparation and provide strategic advice. Shearman and Sterling serves as pro bono legal support. Amplifier Strategies will lead an effort to translate Fishery Trust goals into measurable indicators of success and develop and disseminate documentation and support for the Fisheries Trust model.
Policy Context	Once considered limitless, New England's fish stocks are now in crisis and so, too, are the fishermen and coastal communities that have depended on these resources for centuries. In response, many fisheries managers now advocate for implementing a new and different management system, one that determines the total amount of fish available for harvest in a given year and allocates a percentage to fishery participants. The new fish management paradigm, often referred to as 'catch shares', represent an accelerating trend in fisheries management and conservation, and are widely viewed as the region's best chance to successfully rebuild diminished fish populations. However, this new management tool also poses risks to small, independent fishing businesses and small port communities throughout New England. Most fisheries that have previously transitioned to quota management have seen rapid increases in the cost fishermen must pay for fishery access (i.e. permits and/or quota). There is a progression of problems associated with this trend which explain the current opposition of many small-scale fishermen to quota-based management: • Small-scale fishing businesses lack access to the capital necessary to compete with larger fishing companies and corporations in terms of permit acquisition. • Large, well-capitalized corporations then accumulate nearly exclusive access to

fishery resources.

- As corporations consolidate quota, fishing opportunities, migrate away from smaller coastal communities and eliminate many historical fishing economies.
- Small-scale fishermen that do stay in the business are often characterized by becoming specialists, taking on excessive debt burdens to buy enough quota in a single fishery. This trend from traditional diversified community based fishermen to single-species fishermen is destructive to communities and the environment.
- The next generations of young fishermen are unable to enter fishery due to prohibitive cost of access.

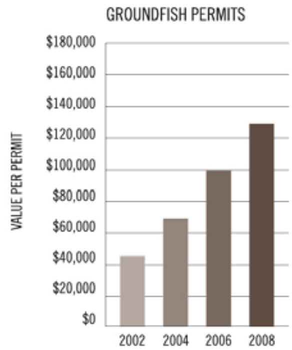
In addition to these unintended negative consequences for small fishing operations and communities, there is also a widely ignored suite of economic concerns associated with these systems that could have dire long-term consequences for participants and the resource. Specifically, there is widespread underestimation of risk associated with financing quota acquisition. Risk underestimation, coupled with free initial allocation of fishery 'assets', drive irrational pricing and precipitate a market system that builds unsustainable levels of debt to finance fishery access. Under this system, there is a predictable mismatch between the length of the required loan and the ability of any individual to accurately forecast future resource trends. This disparity means fishermen are in effect 'betting the farm' that natural fluctuations in resource abundance will not prevent them from financing their debt, is clearly precarious and might actually undermine conservation goals of fishery management plans.

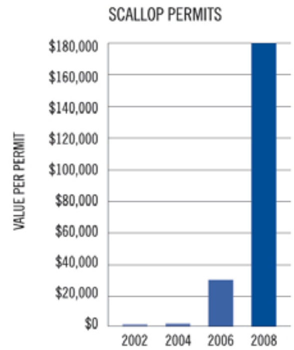
Consequences of Catch Shares on Cape Cod

These negative consequences of the current management transition are particularly harmful for ports and traditional fishing communities like those found on Cape Cod. This area is proximal to a diversity of ecosystems and marine resources, including Cape Cod Bay, Nantucket Sound, Nantucket Shoals and Georges Bank which are all within striking distance of small and mid-sized fishing vessels. The diversity of habitat types gives rise to a diversity of fishing opportunities and this has been the key to success for Cape Cod fishermen. Cape Cod fishermen have been adaptable and diversified like a well managed mutual fund that maintains a steady and balanced return to its investors for long time horizons.

To help restore fish populations, government regulators have issued a limited number of tradable permits, which allow fishermen to catch a fixed quota of fish per year. The initial permits were issued to fishermen free of charge. Permits can be traded and sold for cash; as demand increases, prices escalate rapidly. Cod permits alone increased in value by 20% every year from 2003 to 2007. The resulting economics are similar to those of taxicab medallions in New York City: short on supply, high in price.

Rising Cost of Active Fishing Permits on Cape Cod





High permit costs are forcing local businesses to make unsustainable business decisions such as carrying business debt as a second mortgage or restructuring the way that the vessels compensate crew members. Specifically, captains facing high debt costs to buy permits are now reducing the wage they pay crew members. Commercial fishing is no longer a viable long-term career for crew members; and, therefore, there are increasingly few fishermen who are in a position to become vessel-owners themselves when local captains retire. This trend threatens the very existence of our fishing fleet.

Just as big agribusiness is ruining family farms and rural landscapes in deference to efficiencies, short-term profits and shareholder interest, excessively high permit prices gives an unfair competitive advantage to bigger companies with better access to capital and financing. This creates an economic imbalance that denies community access to adjacent resources. Cut off from their livelihood, fishermen will leave, until the community has lost its most valuable resource—the people who are its lifeblood and culture.

Scallop Fishery Description

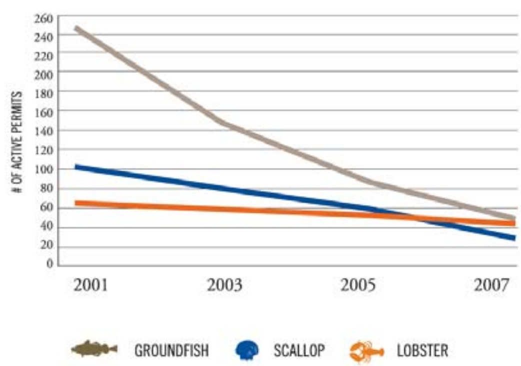
The general category scallop fishery is the first individual fishing quota system (IFQs) in New England. Resource and market conditions for scallops are ideal with high and stable populations that yield 45-60 million pound quotas annually. Scallop prices are high and stable with average prices over $6 per pound in recent years.

IFQ management for the general category scallop fleet creates risks to local communities. IFQ implementation program will decrease the number of General Category scallop vessels in New England from over 600 to 125 or less. Until 2007, there were over 100 vessels on Cape Cod that were awarded the opportunity to fish for scallops under the General Category permit, but the active fleet typically consisted of under 40 vessels. Since implementation of the IFQ, under 20 vessels remain on Cape Cod and less than 5 would be solvent without assistance from the Cape Cod Fisheries Trust. General Category vessels on Cape Cod have taken on large debt obligations to buy quota and many have become scallop specialists instead of relying on a traditionally diversified suite of fisheries for their economic stability.

IFQ management also creates environmental risk due to quota consolidation on larger vessels with more horsepower and heavier dredges that have greater impacts on sensitive sea floor habitats.

Groundfish Fishery Description

Throughout recent history, the groundfish fishery (including haddock, cod, flounder, white hake, halibut and pollock) has been plagued by overfishing and destructive fishing

	practices. Specifically, there has been little control over the quantities of target and non-target fish caught annually, and destructive fishing gears (e.g. dragging) have compromised critical seafloor habitat. As a result, many fish populations are greatly diminished, and the fishery has experienced declining productivity and profitability. Since the 1990's, fishery managers have used effort-control restrictions (days at sea and daily trip limits) to reduce the productivity of the groundfish fleet. While limiting the efficiency and profit of fishing businesses, these rules did not necessarily constrain the fleet to an annual quota. Consequently, overfishing persisted as opportunistic fishermen repeatedly adapted to maximize harvest under increasingly restrictive and complicated regulations. This failing groundfish management program is now being replaced by a catch-shares management system ('Sectors'). Sectors, which are essentially harvesting cooperatives, will be allocated a certain portion of the annual catch, and participating fishermen will be allowed to harvest fish whenever and however it is most profitable. In this way, the new system provides an opportunity for the fleet to achieve greater profitability. Nevertheless, the price of quota will predictably increase as markets develop, and this trend is consistently detrimental to smaller fishing businesses as well as small fishing communities. Loss of Active Fishing Permits on Cape Cod 
Overall Project Benefits	In 2005, fish regulators voted a new scallop quota system to control annual catch to protect the population and future viability of the industry. Over 100 fishermen on Cape Cod held a permit to catch sea scallops harvesting $10 million in scallop landings during peak years. Since 2007, those numbers were reduced to 20 vessels with a projected catch of $1.5M. Many of the 20 vessels became insolvent with implementation of new regulations and would have been forced to sell their quota to larger and more efficient businesses in other ports due to their low quota allocations. The Trust has bought sufficient quota to protect them. As a result, we did not lose additional scallop businesses and we expect over $3M in scallop revenues in 2010. The Trust will affect the groundfish fishery on Cape Cod in an analogous way. In 2010-12, the Trust will protect the groundfish industry by securing the catch of 5M pounds of groundfish worth $7M annually retaining $30.8M in total sales, $10.8 in total income impacts, and 274 jobs. The expected doubling of groundfish within 15 years will generate 7M more pounds of groundfish landings on Cape Cod worth $10M and 392 new jobs.
Area of Impact	Cape Cod, Regional implications as a model for fishery economic development and community stabilization under new fish quota systems/

Target Population	The primary target population for the project is the seafood industry on Cape Cod. In addition, the project will have additional impacts. Jobs in the fisheries industry have a positive ripple effect on the region's economy. Final Demand Regional Multipliers for Barnstable County developed by the Bureau of Economic Analysis Regional Input-Output Modeling System (RIMSII) (3^{rd} Edition, 2006) indicate that every \$1.0mil in output generated by the fisheries industry creates an additional \$1.5mil in output by other businesses in this region. Similarly, \$1.0mil in output creates 15.4 new jobs in the regional economy. This means that every dollar coming from the fisheries industry is a precious dollar for Barnstable County, strengthening the economic sustainability of the region. The importance of the fishing industry to tourism, a mainstay of Cape Cod's economy and, like fisheries, a key export industry, cannot be underestimated. Tourists and visitors spend generously on lodging, food, and recreational activities in their quest for an authentic New England seaside experience. Food grown and harvested on Cape Cod is appealing to tourists and residents alike while being important to overall economic growth through import substitution. Fresh seafood in particular is a frequent menu choice year-round. Seafood is an important ingredient of the Cape's new Buy Local Initiative—another one of the 16 regional priority projects included in the 2009 CEDS—which includes development of a community-supported fishery on Cape Cod.

Project Team - Who

Lead Organization (Sponsor)	Cape Cod Commercial Hook Fishermen's Association
Partner Organizations	Cape Cod Commission Community Development Partnership Conservation Law Foundation MA Development Amplifier Strategies
Principle Researcher (Manager)	Paul Parker
Research Team	Cape Cod Commission Staff Dan Dray Leslie Richardson
	Other Organization Staff
CCC-ED Coordinator (Expediter)	Dan Dray

Project Schedule – What & When

Duration	
Project Plan	
Phase 1	EDA Application Submitted Spring 2010
Phase 2	EDA Funding – January 2011
Phase 3	Quota Purchase and Management – 2011
Phase 4	Impact Assessment – 2012 - 2027

Project Methodology - How

Study Area(s)	
Research Questions	
Research Methods	
Deliverables	

Risk & Stakeholder Management

Risks to Project	
Contingency Plans	

Stakeholders Table			
Stakeholder Name	**Interest in Project or Outcome**	**Engagement Approach**	**Concerns**

Stakeholder Grid (place stakeholders in appropriate quadrant)	
High Influence	Driving
Low Influence	Restraining

Budget & Non-staff Resources Needed

Total Cost		Public Share:	Private Share:

Quality Assurance & Performance Standards

Job Impact	Jobs Created	
	Jobs Retained	
Measures of Success	Quantitative Measures (minimum of 3)	
	Qualitative Measures (minimum of 3)	

EDA Key Questions

How will this project serve one or more economically distressed populations?

Areas of Economic Distress

The US Economic Development Administration allocates its funding according to need as well as consistency with their investment goals and other requirements specific to the different grant programs. The EDA determines need based on a series of distress factors; the most common being unemployment and low income. A number of other indicators of need can however also be considered. The following section is focused on those EDA distress factors that seem to pertain to this region. These include unemployment & underemployment, population imbalances, military base realignment, natural disasters, and depletion of natural resources.

Traditional Measures of Economic Distress – Overview: The Cape Cod economy has been long dominated by the tourism and hospitality industries offering primarily low-wage seasonal jobs. More than 25% of Cape Cod's workforce is employed in the Retail and Accommodations & Food Services industry sectors. Low wages combined with a relatively high cost of living on the Cape have many in the workforce struggling to make ends meet. A report published by Barnstable County estimates that one third (32.5%) of County residents live in households with an annual income under 200% poverty.2[1] Nearly a quarter of Barnstable County residents (24.2%) are classified as living in "working poor" households. Overall, poverty levels are lower in Barnstable County than either state or national levels, but two population sub-groups show higher than expected poverty levels: families with children and households with persons age 65 or older.

As many as 30% of County residents live in households that report trouble paying healthcare expenses, 26% live in households that report difficulty in meeting housing costs, and 22% live in households that report problems paying for adequate amounts of nutritious food. An estimated 42,000 County residents lack health care insurance and over 3,500 of this number are children under the age of 18.

The lack of adequate diversity of commerce and higher-paying jobs appears to be a motivating factor in the out-migration of important segments of the Cape's current and future workforce. From 2000 to 2006 the Cape lost 10.9% of children under 16 years of age and 10.7% of residents 35-44 years of age. The fact Cape Cod is losing both core members of its workforce and young residents who would normally become Cape Cod's future workforce points to an extremely challenging problem which must be overcome in order for Cape Cod to establish a sustainable economy.

Income

The Massachusetts Self-Sufficiency Standard of 2006 indicates that the minimum sustainable income on Cape Cod for a family consisting of two adults and two preschool age children was $66,326 ($15/hour). For a family consisting of two adults and two school age children the minimum sustainable income was $49,613. In 2006 the Median Family Income for Barnstable County was $66,800: nearly identical to the Self-Sufficiency Standard for two adults and two preschool age children.

While median household and family incomes in Barnstable County are higher than national levels, they are about 4%-9% below comparable statewide levels. Looked at from a different angle, 2007 Median Earnings for Workers (nonfamily households) in Barnstable County was 2% lower ($31,155) than for the state as a whole ($34,542). A major cause of the income disparity is Barnstable County's dependence on low-wage industries such as retail trade which in 2007 was the largest of 20 different sectors in the county and which had an Average Wage per Job of $27,556 in 2007.

How will this project improve competition within the region?

Maintain access to commercial fishing quota during chaotic transition to new fisheries management paradigm.
Allows local fishermen to compete with larger and better capitalized fishing industry from larger ports.
Improves ability of fishermen to control their seafood product as it enters the marketplace.
 -Leading to buy local and other local food system opportunities.
 -Leading to higher prices and better access to locally harvested foods.
Ensures affordable access to adjacent marine natural resources.

How will this project improve the region's competitive position in the global economy?

The Cape Cod Fisheries Trust will anchor the commercial fishing industry to Cape Cod during a highly unpredictable and tumultuous time in fisheries management. The transition to quota management using "catch shares" is one that has been socially and economically disruptive around the world and across the United States. Whereas rapidly rising costs of catch shares and quota have caused the downfall of numerous fishing communities in Alaska, Gulf of Mexico, California, Maritime Canada, British Columbia, Iceland and New Zealand, these systems have also experienced notable stabilization and increasing fish productivity, fish prices, job stability, and high quality job abundance. In nearly all instances, transition to quota management and "catch shares" has delivered fisheries of much higher value. The community challenge has become developing a means to survive the transition from public rights that allow community participation to privatized rights that favor corporate ownership.

The Cape Cod Fisheries Trust presents a robust alternative model that takes advantage of catch shares to stimulate many of the expected economic impacts and benefits of the catch share system while concurrently placing the quota into community ownership. The principal innovation of the Trust is allowing communities to own quota and take advantage of the benefits of catch share fisheries management without the high social and economic costs.

How will this project support innovation and entrepreneurship in the region?

The Cape Cod Fisheries Trust is a forward looking program that will enable survival of the Cape Cod commercial fishing economy through a period of rapid and destabilizing consolidation and contraction. Commercial fisheries are undergoing a well publicized and contentious transition. This transition to catch shares is mandated by the Magnuson-Stevens Act and entails necessary short-term conservation sacrifices to rebuild fish populations. By ending overfishing, fisheries regulators will build a future of increased profitability and prosperity within rural fishing communities. In this, New England fisheries are likely an area of the Nation which will experience sudden and severe economic dislocation and job loss due to restructuring of the groundfish and scallop fisheries.

We are in the initial stages of a 2-5 year transition from an era of overfishing and diminishing commercial fish landings to a new "catch share" regime that stabilizes quotas, improves access to markets, increases fish populations, increases efficiency and rebuilds fishing business profitability. Leadership at National Ocean and Atmospheric Administration has clear expectations as evidenced by a speech by Dr. Jane Lubchenco, Under Secretary of Commerce for Oceans and Atmosphere, in Boston on March 19, 2009.

"Recent scientific analyses show us that fisheries managed with catch share programs perform better than fisheries managed with traditional tools. Even in the first years after implementation, catch share fisheries are stable, and even increase their productivity. The scientific evidence is compelling that that catch shares can also help restore the health of ecosystems and get fisheries on a path to profitability and sustainability".

While the new administration is committed to a transition to catch shares in order to protect fish stocks, they also harbor similar concerns to those voiced at CCCHFA regarding the possibility of unintended consequences to fishing communities. Dr. Lubchenco is on record saying that the government is not interested in consolidating fishing down to a few companies. NOAA favors adoption of strategies that protect communities such as the Cape Cod Fisheries Trust.

"Small fishing communities are a valuable part of our natural heritage and our culture. They are a lot of what makes special places along the coastline special," Lubchenco told The Associated
Press in late July. "Fishing is about a lot more than just economics. It's about providing healthy, safe seafood. It's about jobs. But it's also about place. It's about culture. It's about community. And those are all important, and I think need to be maintained,"

The comments were delivered after the New England Fishery Management Council adopted a plan to switch to a new "catch share" system in order to cope with dwindling fish populations and tighter regulations.

Catch shares will help restore fish populations; government regulators issue a limited number of tradable permits, which allow fishermen to catch a fixed quota of fish per year. These initial quotas (typically denominated in pounds or % share) are issued to fishermen free of charge. Quota can be traded and sold for cash; as demand increases, prices escalate rapidly.

High quota prices give an unfair competitive advantage to bigger companies with better access to capital and financing. This creates an economic imbalance that denies fishing communities' access to their own adjacent resources. Cut off from their livelihood, fishermen will leave, until the community has lost its most valuable resource—the people who are its lifeblood and culture. Fishing businesses and the fishing economy are migrating off of Cape Cod. Since 2001, Cape Cod has lost 191 active groundfish businesses and 60 active scallop businesses. Groundfish revenues are down 57% from $8.3 million to $3.6 million during the same timeframe.

What products or services will be exported out of the region as a result of this project?

The Cape Cod Fisheries Trust will restructure the relationship between fishing communities and adjacent marine resources in order to optimize conservation, social, and economic benefits of a transition to quota management in New England. The CCFT is delivering a scalable and meaningful systemic region-wide socioeconomic and conservation changes.

Current work will scale the Trust model from prototype to paradigm. CCCHFA proposes to seize an opportunity that is timely but limited in duration. New England fisheries will transition to quota management in the next 3-5 years. A viable model for community control of fishing rights will prevent a grim future for fish, fishermen and fishing communities. Now, the opportunity is for expansion and regional scaling of the model. Benefits of the Cape Cod Fisheries Trust will include:

Organizational:

- Stabilize a long-term source of revenue for CCCHFA through leases with local fishermen.
- Deepen institutional ties to the Community Development Partnership.
- Work within the fishing community to facilitate meetings, convene fishermen and deliver a vision of hope to a beleaguered but vital component of our community.

Local:

- Maintain a vibrant local fishing economy with active fishing vessels, fishermen and crew.
- Reduce the impacts of overfishing, bycatch and habitat damage.
- Create a viable model for intergenerational succession of fishing rights.

Regional:

- Provide a fishery management tool that ensures a beneficial transition to quota management.
- Expand the influence of the Fishery Trust model from community to regional significance.
- Improve the conservation performance of groundfish sectors and other community based fishery management.

How will this project increase the availability of clean energy?

NA

How will this project decrease demand for fossil fuels?

NA

Document Change Activity

The following is a record of the changes that have occurred on this document since originally drafted

Version #	Change Description	Author	Rev. Date

Appendix 3: New Regional Priority Project Summaries

Priority Number	AR-1

Priority Project Summary

Project Title	**Canal Area Assessment & Transportation Improvement**
Goal of the Project	Complete a Canal Area Transportation Study to determine the feasibility of rail transport. Based on this research and through a public process, develop a series of transportation improvements for the Cape Cod canal area.
Description	Improved transportation across the canal focused on rail (passenger and freight) to facilitate economic development and tourism. Rail has the potential to become an essential element in transportation for Cape Cod. An improved and efficient transportation system will leverage the summer season and increase employment and business opportunities year-round. Possible rail projects include a demonstration pilot project involving rail service from Boston to Cape Cod for weekend summer service; restoration of the "Cape Codder" service from New York for weekend service; and private feeder rail passenger service from Hyannis to Middleboro.
Overall Project Benefits	✩ Viable public transit system; ✩ Reduced transportation costs due to less need for automobile use; ✩ Reduced use of fossil fuels with less automobile travel and a reduction in carbon dioxide pollutants; ✩ Improved health and less expensive health care costs from less pollution and increased opportunities for walking; ✩ Financial gain for the regional economy with increased tourism; ✩ Development concentrated in villages and economic centers

Priority Number	AR-2

Priority Project Summary

Project Title	**Regional Information Clearinghouse – Strategic Information Office**
Goal of the Project	To guide the strategic use of information and information technology for management and policy applications that affect the region. Focus will be on developing data standards, identifying and implementing new data sources across a variety of subject areas and disciplines; improving data accessibility; establishing data partnerships with an array of institutions organizations, agencies, and municipalities; designing new data applications to improve the design and delivery of services; providing data to assist with management and policymaking; and, in general, providing reliable data tools to achieve problem solving goals across the region.
Description	Establishment of a Strategic Information Office to centralize regional data collection and to leverage network infrastructure for the purpose of improving how information/data is collected and managed on a regional basis. The Office will help identify management and information technology needs of the region and will help enhance coordination and collaboration between various public and private entities.
Overall Project Benefits	✮ Improve the efficiency and integration of information technology platforms region-wide; ✮ Support and enhance network infrastructure that meets community and regional data needs; ✮ Expand community access to services and the reliability and quality of services; ✮ Improve availability and dissemination of information and data on a regional and local level; ✮ Facilitate the diversification and expansion of the region's economy by stimulating the growth of well-paying technology-based jobs consistent with the cost of living on Cape Cod; ✮ Creation of more year-round employment opportunities

Priority Number	AR-3

Priority Project Summary

Project Title	**Center of Excellence for Water Quality Technologies and Innovation**
Goal of the Project	To establish a coordinated data-based approach for researching and solving Cape Cod's regional water issues that embodies the interests and expertise of both public and private entities and that stimulates economic development and job creation.
Description	A Center of Excellence for Water Quality Technologies and Innovation will address critical issues surrounding the smart management of drinking water, waste water, and coastal water. The goal will be to develop a public-private partnership with regional research and academic institutions including but not limited to Woods Hole Research Center, Marine Biological Laboratory, Regional Technology Development Corporation, Cape Cod Commission, and private businesses with research and commercial interests in the water space. Additional regional and national partners in the applied engineering, environmental and technology sectors will be identified and integrated into the work of the Center. The Center will combine a wide range of water-related interests, e.g. research; new product development and commercialization; data collection and analysis; scientific modeling; management, monitoring and testing; municipal and regional government planning and regulatory imperatives; etc. A key aspect of the Center will be the creation and management of a large regional database of water-related data. This database will reside on the OpenCape servers sited in the regional co-location center at the County Complex. The Center will help to diversify regional employment by stimulating the growth of well-paying technology-based jobs.
Overall Project Benefits	✯ Coordinated regional approach to solving the Cape's water-related problems; ✯ Use of water as a driver for economic development and job creation; ✯ A new public-private model for meeting a major regional research and service need; ✯ Development and commercialization of new water testing, monitoring and treatment technologies; ✯ Creation of new regionally and even nationally recognized research programs focusing on the quality, monitoring and management of water

Priority Number	AR-4

Priority Project Summary

Project Title	**Waste Minimization: Reduce, Reuse, Recycle**
Goal of the Project	To establish regional waste minimization strategies and best management practices intended to extract the maximum practical benefits from products and generate the minimum amount of waste.
Description	To develop regional solid waste minimization strategies consistent with the waste hierarchy of reduce, reuse, and recycle. These strategies will encourage the integration of both bottom-up and top-down activities to align waste minimization with long-term zero waste goals. The project will be designed to take advantage of the economic development and job creation potential inherent in waste minimization and zero waste policies. The project will enlist experts from public and private entities and encourage the formation of collaborative partnerships.
Overall Project Benefits	✯ Reduction in the size of regional and municipal waste streams; ✯ Reduced use of resources and energy; ✯ Reduced environmental impacts from waste; ✯ Creation of locally owned and operated businesses, new jobs and training opportunities involving waste recovery and reuse; ✯ Creation of new rules and incentives aligned with the zero waste concept; ✯ A new public-private model for meeting regional waste management needs; ✯ Development of data management technology to drive economic development and job creation related to waste minimization.

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