CAPE COD REGION
COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY
CEDS FIVE-YEAR UPDATE

SUBMITTED TO:
US DEPARTMENT OF COMMERCE ECONOMIC DEVELOPMENT ADMINISTRATION

APPROVED & SUBMITTED BY:
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TABLE OF CONTENTS

	PAGE
FORWARD	3
EXECUTIVE SUMMARY	5
CHAPTER 1: CEDS PROCESS	8
The Cape Cod Region	8
The Legal & Philosophical Basis of the CEDS	8
The CEDS Planning Structure	9
The CEDS Regional Planning Process	10
The CEDS Approval Process	13
CHAPTER 2: CEDS CONTEXT	14
Background: Development Capacity & Sustainability	14
Background: Resident Attitudes about Development	14
Quick Facts	16
Description of the Cape Cod Regional Economy	17
Data Trends	18
Areas of Economic Distress	22
CHAPTER 3: CEDS VISION	30
Background	30
The Region's Growth Policy	30
The Region's Economic Development Vision	31
The Region's Economic Development Goals	31
The Region's Goal for the CEDS and CEDS Process	34
CHAPTER 4: CEDS ACTION PLAN	35
The Purpose of the CEDS Action Plan	35
The Structure of the CEDS Action Plan	35
Regional Priority Issues	35
Regional Priority Projects - Summary	38
Regional Priority Projects – Individual Project Forms	40
On-going Economic Development Programs & Planning Activities	97
Local Capital Projects	102
CHAPTER 5: CEDS IMPLEMENTATION & PERFORMANCE MEASURES	105
Implementation & Evaluation	105
Implementation Plan	105
CEDS Annual Evaluation	107
Level 1: Overall Regional Performance Measures	108
Level 2: CEDS Process Performance Measures	111
Level 3: Regional Priority Project Performance Measures	112
Level 4: Ongoing Activities and Local Capital Project Performance Measures	113

APPENDICES	#
Regional Policy Plan (excerpt)	1
• *Regional Planning & Regulatory Sections for Land Use and Economic Development*	
CEDS Leadership	2
• *Cape Cod Commission Members*	
• *Cape Cod Economic Development Council/CEDS Strategy Cmty*	
• *CEDS Administrative Committee*	
Phase 1 Materials	3
• *STATS Cape Cod Homepage*	
• *STATS Cape Cod Side-by-Side County Profile*	
• *Myth or Fact Briefs*	
• *Cape Trends*	
Planning Participants	4
• *Work Group Participants*	
• *Focus Group Participants*	
Work Group Kick-Off	5
• *Agenda*	
• *Overview of Five-Year Update of the CEDS*	
• *Phase 2 Planning & Adoption Timeline*	
• *Work Group Process*	
• *Work Group Summary Table*	
• *Guide for Prioritizing Projects*	
• *Economic & Business Development Defined*	
• *CEDS Quick Fact Sheet*	
• *Massachusetts State Sustainable Development Principles*	
• *EDA Fact Sheet*	
• *CEDS Fact Sheet*	
• *Presentation: Paul Niedzwiecki, Executive Director CCC*	
• *Presentation: Leslie Richardson, Economic Dev. Officer, CCC*	
Work Group Materials	6
• *Session 1 Agenda*	
• *Checklists*	
• *Priority Project Form*	
Focus Group Materials	7
• *Focus Group Structure*	
• *Priority Project Handout*	
• *Focus Group Results*	
Public Comment Period	8
• *Press Release*	
• *Comments Received*	
Documentation of Approval Process	9
MMR BRAC Economic Impact Analysis – UMass Donahue Institute	10
Compendium of on-going economic development activities	11
Compendium of local capital projects	12

FORWARD

This is the five year update of the Comprehensive Economic Development Strategy (CEDS) for the Cape Cod region prepared in accordance with U.S. Economic Development Administration (EDA) guidelines and submitted to the EDA on June 30, 2009. The forward 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 a document and a process; 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 will allow the region and the towns therein 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 includes 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 or priorities. The following elements must be addressed in the annual reports:

1. Adjustment to the CEDS: Changes in the planning process, structure, or strategy
2. Activities Evaluation: Quantitative and qualitative progress on priority projects
3. Goals Evaluation: Overall progress toward meeting regional goals
4. Implementation Schedule: Timeline of the activities for the upcoming year

EXECUTIVE SUMMARY

The following five-year update of the Barnstable County Comprehensive Economic Development Strategy (CEDS) represents a new era of collaboration around economic development. Over one hundred people actively participated in the development of this strategy through an exhaustive and invigorating public process. The participants are vested in seeing this strategy implemented and will remain engaged in the annual CEDS evaluation process. Participating organizations have already begun working together on the regional priority projects; in some cases grant requests to EDA are also under development. This level of coordination around a set of sixteen regional priority projects is unprecedented on Cape Cod.

Summary by Chapter

CEDS Regional Planning Process: Chapter 1 describes the organizational structure and planning process used to develop the CEDS. Barnstable County encompasses the 15 towns known as Cape Cod, a unique glacial spit of land jutting off the southeast coast of Massachusetts. The Cape Cod Commission, the regional planning and regulatory authority, leads the CEDS process and adopts the plan on behalf of Barnstable County. The Cape Cod Economic Development Council (EDC) acts as the CEDS Strategy Committee for the Commission; together they include representatives of all the groups required under the EDA guidelines. The legal and philosophical basis of the CEDS is established in the Cape Cod Commission Act, passed by the Massachusetts Legislature in 1990, and the Cape Cod Regional Policy Plan.

The Commission designed an innovative and intensive public process to identify a set of regional priority projects for implementation over the next five years. 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, workforce, industry clusters, direct business assistance, and overall business climate. During the month of April, each Work Group met three times for a total of nine hours each to successfully select three priority projects. An additional priority project was adopted due to its universal support by all Work Groups, for a total of 16 priority projects. There was remarkable consensus around the priorities, and participants found the action-oriented format and compressed timeframe invigorating.

Once identified, the priority projects were then vetted using Focus Groups. Three Focus Groups were convened: one of small and large business owners or executive officers; another of municipal staff; and the third of elected officials ranging from the town to the federal level. Each group was asked the same set of four questions drafted to reflect EDA priorities. Each participant was given the opportunity to respond to each question twice. The sessions were lively, and confirmed the priorities identified by the Work Groups but with some useful surprises. The Focus Groups honed in on a number of specific projects that were representative of the infrastructure limitations confronting the Cape.

The third public participation element was the two-week public comment period. The public had the opportunity to comment on the planning process as well as the priority projects. The draft report, along with materials distributed throughout the planning process, was posted on the Commission's website. A press release announcing the public comment period on the draft report was sent to Cape Cod media outlets, municipalities, and to all economic stakeholders that participated or were invited to participate in the

planning process. The public comments received are included in this document in Appendix 8. Revisions to the draft document based on public comment were made accordingly. The completed document was then endorsed in public meeting by the Cape Cod Economic Development Council and adopted by the Cape Cod Commission, also in a posted public meeting.

The CEDS Regional Analysis: Chapter 2 of the five-year update highlights trends that make the Cape Cod region unique from an economic development perspective. Since the mid-twentieth century, Cape Cod has been best known as a tourist and retirement destination. Residential and commercial development has occurred at high rates over a short period of time within a limited, and environmentally sensitive, geographic area. Industries that typically serve local markets – retail and food services – are larger on Cape Cod in order to serve tourists, second home owners, and day-trippers to the area. On the Cape, therefore, these industries are both local and traded clusters of business activity. Yet their benefit as export industries is limited by the low wages and seasonal employment they offer. Emerging traded clusters include analytical instruments, education and knowledge services, renewable energy technology and generation, and marine science and technology. Major employers exist in health service, plastics, information technology, and marine-related education and research. A higher than average percentage of employment is in the form of sole proprietorships.

Until this decade, the population of Barnstable County had grown three times as fast as the state and nearly half again as fast as the nation since 1980. Current population estimates indicate that there has been no net growth in population since the 2000 Census. A higher proportion of the population living on Cape Cod is of retirement age and the percentage of homes occupied by year-round residents is steadily rising. The number of homes on Cape Cod has doubled since 1970, and until the recent economic crisis, construction continued at a higher rate than in the rest of the state.

Meanwhile, the cost of housing, while consistent with Massachusetts, is significantly higher than in the rest of the nation. This remains primarily true even in today's economic recession except for pockets such as Hyannis, which have had a high foreclosure rate. While median household income continues to increase and poverty to decline in the county, housing affordability measures indicate a broadening bifurcation of the population between those with a great deal of wealth and those among the middle and lower classes struggling to maintain their standard of living on Cape Cod. Variations between towns and income groups are apparent in housing costs and income statistics. Data on population estimates and commuting patterns are also included in this section.

The CEDS Vision: Chapter 3 outlines what the region hopes to accomplish in the long-term; it includes the economic development vision, goals, and objectives. Barnstable County adopts through county ordinance a Regional Policy Plan (RPP) with which local and other regional plans, including the CEDS, must be consistent. The RPP is updated at least every five-years; after a rigorous public review the most recent update was adopted in early 2009. The regional growth policy and set of four economic development goals in the RPP are the foundation of the CEDS. In addition, the CEDS outlines a long-term vision for economic development and a specific goal relating to the CEDS process itself.

The CEDS Regional Action Plan: Chapter 4 is the actual economic development strategy for Cape Cod over the coming five-year period. The regional priority projects are the central element of this strategy. Each regional priority project is described in detail using a standard "Priority Project Summary" form. The description includes the project goal, expected benefits including job creation, measures of success, expected

cost and duration, and the organizations collaborating to complete the project. Also included in this chapter are on-going economic development programs, planning projects, and local capital projects to provide a complete picture of where we are going as a region. In the past, the Cape Cod CEDS has focused on on-going activities rather than specific projects in need of funding support from EDA. This CEDS shifts that focus to highlight sixteen capital, planning, and technical assistance projects selected for their potential to improve the foundations of our economy. The participating organizations are vested in seeing these projects implemented and in participating actively in that implementation through both funding and staff effort.

CEDS Implementation & Performance Measures: Chapter 5 outlines the plan for implementation and for annual evaluation of progress on specific projects and the CEDS as a whole. Quantitative and qualitative measures have been identified for each priority project. The measures have focused on outcomes as much as possible; however some process measures of short-term progress have been included as well.

In summary, Cape Cod is fortunate to be a uniquely attractive place to live and work, as well as visit. With historic villages intact, long expanses of publicly accessible beaches, and an interesting heritage of fishing and art that persist today, Cape Cod residents are aware that the health of this rare environment and the health of their economy are inextricable. This awareness was strongly reinforced through the Work Group and Focus Group discussions and the priority projects that were selected. Cape Codders want to retain and improve our traditional sectors such as fishing and tourism, retain our historic architecture and cultural traditions, and move forward into expanding industry sectors such as renewable energy and marine sciences.

CHAPTER 1: CEDS PLANNING PROCESS

The Cape Cod Region

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

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

The region completed its most recent five-year update of the Comprehensive Economic Development Strategy (CEDS) in June 2002. This plan was approved by the EDA following the submission of an evaluation addendum in November 2002. In 2009, the region has chosen to produce a new five-year strategy using a unique, intensive planning process in order to address current conditions and add focus to economic development in the region. This planning effort closely follows the recent review and update of the Regional Policy Plan (RPP) which established four new economic development goals and an overall growth policy for the region (see Chapter 3 for more details).

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 charged with regulating developments that are considered to have regional impact, overseeing land-use planning on Cape Cod, and recommending 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. (See Appendix 1 for the land use and economic development sections of the RPP)

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 Cape Cod Commission
Organizational Structure

Commission Members (19)

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

Staff (~40) http://www.capecodcommission.org/staff.htm

- Executive Director
- Director of Technical Services/Chief of Staff
- Chief Planner
- Chief Regulatory Officer
- Economic Development Officer (CEDS Project Manager)
- Planners
- Technical Specialists
- Regulatory Staff

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:
  1. Barnstable County Commissioners
  2. Barnstable County Assembly of Delegates
  3. Cape Cod Commission

Staff (1)

- Administrator

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

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

The CEDS Administrative Committee: A smaller Administrative Committee was formed to guide staff in the details of designing and implementing the planning process. The committee included members of the Cape Cod EDC including the Cape Cod Commission representative, staff of both the Commission and the EDC, and the chairs of the five Work Groups described in the following section. (The members of this committee are listed in Appendix 2)

The CEDS Regional Planning Process:

The Cape Cod Commission (CCC) and the Cape Cod Economic Development Council (EDC) have devoted an unprecedented amount of financial and staff resources to the development of the 2009 five-year update. The CEDS process has been broken down into three phases:

- *Phase 1: Planning Foundation*
- *Phase 2: Strategy Development & Adoption*
- *Phase 3: Implementation & Evaluation*

Phase 1: Planning Foundation: The goal of the first phase was to compile background information and data needed to inform the subsequent planning and implementation phases. During this phase, Commission staff prepared several white papers on issues faced by the region, outlined a set of regional balanced economy benchmarks (see chapter 5), and began to develop STATS CapeCod, in partnership with STATS America, which is managed by the Indiana Business Research Center at Indiana University Indianapolis. This site is a prototype that other regional planning agencies could use to disseminate real-time data profiles of their

region at the county and eventually the town level. Phase 1 served to initiate these projects that are now ongoing. Appendix 3 includes a sampling of the work completed in Phase 1.

Phase 2: Strategy Development & Adoption: The Commission designed an innovative and intensive public process for Phase 2. 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 because we were able to build on the year-long Regional Policy Plan public process just completed in December 2008. CEDS participants focused on developing a set of regional priority projects that they would collaborate to implement over the next five years. Participation was primarily achieved using a Work Group structure supplemented by several Focus Group sessions and a two-week public comment period.

- CEDS Work Groups

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 4.

The Work Group meetings began with the CEDS Work Group Kick-Off Meeting at the end of March to gather the participants together, orient them to the goals behind the process and to the structure of the process itself (see Appendix 5 for the agenda, handouts, and presentations). During the month of April, each Work Group met three times for a total of nine hours each. Their mission was to identify three projects that could be completed within five years, and with the greatest potential to strengthen the regional economy and improve the quality of life on Cape Cod in the long-term. The Work Groups were given the following guidelines:

1. A priority project can be:
    a. A capital investment in infrastructure, or
    b. A planning effort, or
    c. A technical assistance program serving workers or businesses.
2. A priority project must:
    a. Be consistent with the Regional Policy Plan Growth Policy, and
    b. Improve the number and quality of jobs in the region either directly or indirectly, and
    c. Attract private investment directly or indirectly, and

   d. Foster regional solutions and partnerships.
3. All priority projects should be S.M.A.R.T.
   a. **S**pecific,
   b. **M**easurable,
   c. **A**chievable,
   d. **R**ealistic, and can be completed within the given
   e. **T**imeframe.

At the first meeting group members proposed potential regional projects to address issues pertinent to their Work Group topic. Members were encouraged not to "reinvent the wheel" while being open to new combinations and concepts. One priority project immediately rose to the top of all Work Group lists; this became the sixteenth project. As details were provided about other potential projects, the groups were able to narrow their choices through a scoring methodology, and by the third meetings all groups had selected three priority projects for inclusion in Chapter 4 of this CEDS. (See Appendix 6 for scoring worksheets and the project summary form template.)

There was remarkable consensus around the priorities, and participants found the action-oriented format and compressed timeframe invigorating. The Work Group participants came to the meetings with an intimate knowledge of the regional issues on Cape Cod and ready to hone in on specific actions that would move the region forward. Virtually no time was spent bemoaning what wasn't possible; all energy was put towards finding regional solutions that would ensure long-term sustainable economic development on Cape Cod.

✯ CEDS Focus Groups

Once identified, the priority projects were then vetted using Focus Groups. Three Focus Groups were convened: one of small and large business owners or executive officers; another of municipal staff; and the third of elected officials ranging from the town to the federal level. A total of 23 people participated in the one hour-and-a-half focus groups sessions that took place during the first week of May. Each group was introduced to the CEDS and the priority projects through a PowerPoint presentation and provided with a brief written description of each project.

Each group was then asked the same set of four questions drafted to reflect EDA priorities, with each participant having the opportunity to respond to each question twice. This process allowed them to build on the comments of others and react more completely. While each group included a different constituency and the pace of the comments was different, it was interesting that all three groups had very similar comments. The Focus Groups honed in on a number of specific projects that were very representative of the infrastructure limitations confronting the Cape. This harmony of voices indicated that the priority projects were on the right track relative to the needs of the region. (See Appendix 4 for a list of those who participated on the focus groups and Appendix 7 for the materials presented and the results).

✯ CEDS Public Comment Period

The third public participation element was the two-week public comment period. The public had the opportunity to comment on the planning process and on the priority projects. The draft report, along with materials distributed throughout the planning process, was posted on the Commission's website. A press release announcing the public comment period on the draft report was sent to Cape Cod media outlets,

municipalities, and all economic stakeholders that participated or were invited to participate in the planning process. A number of comments resulted in additions or changes to the document. The press release and public comments received are in Appendix 8.

The CEDS Approval 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

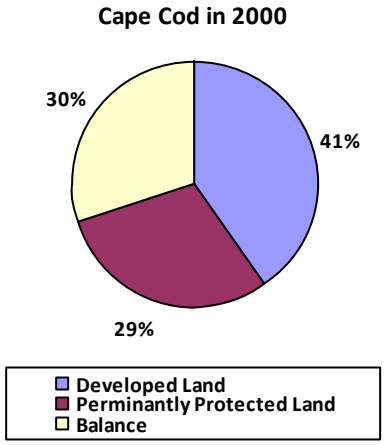
The agenda and minutes from these meetings are included in Appendix 9. The final step of the approval process is certification by the US Economic Development Administration to which the full document is submitted on June 30, 2009.

CHAPTER 2: CEDS CONTEXT

Background: Development Capacity & Sustainability

The land area of Cape Cod is 253,701 acres with 560 miles of shoreline. In 2000, 41% of the land on the Cape was developed. Another 29% (74,629 acres) was permanently protected, leaving about 30% or 76,973 acres—approximately one-third of the remaining land—available for development.

While not all of this land can be built on due to the presence of wetlands, unsuitable topography, or other constraints, it is still subject to environmental impacts and habitat fragmentation from the development that could occur.



In 2000, the Cape Cod Commission, working in partnership with the Massachusetts Executive Office of Environmental Affairs, conducted a "build-out" analysis for all 15 Cape towns. This analysis examined local zoning and other growth-related regulations currently in place, and made projections about future growth based on the amount of remaining developable land.

The analysis revealed that, with no additional growth management or land-protection efforts, the Cape could add 37,000 houses and at least 50,000 people at build-out. Moreover, at current growth rates, build-out will likely be reached within 30 years—well within the lifetime of many of the people reading this passage.

During the 1990s, more than 15,000 acres of open land was converted to development. During the same period, the number of houses increased by approximately 17,000 and the population increased by roughly 35,000. The Cape is now home to over 220,000 year-round residents and some 150,000 homes. Population growth has reached at least a temporary hiatus, with the 2008 estimate showing a loss of 1,181 people relative to the 2000 Census.

Background: Resident Attitudes about Development

1995 Cape Cod Residents Survey: In the 1995 Cape Cod Residents Survey prepared for the Cape Cod Commission, respondents indicated that the following factors were very important in their decision to live on Cape Cod: 60% cited the air and water quality, 60% cited safety from crime, 55% cited proximity to the coast, 52% cited the rural character of the Cape, and 48% cited the small-town lifestyle.

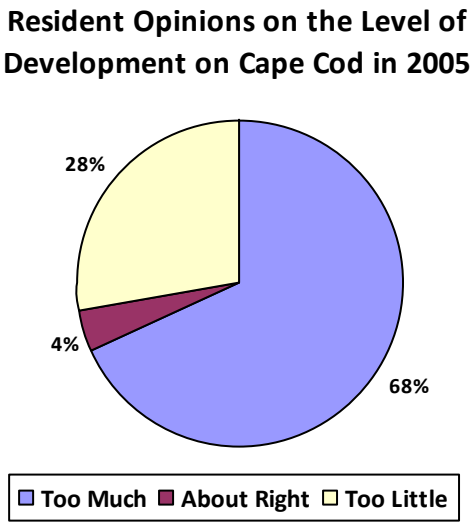
Respondents ranked traffic congestion, population growth, groundwater pollution, pollution of coastal waters, loss of open space, and tax increases as the most serious problems facing the Cape in the next five years. Fifty-four percent (54%) of the respondents indicated that population growth in their town had worsened the quality of life during the previous 25 years.

The 2005 Cape Cod Residents Survey: A 2005 Residents Survey completed in advance of the 2009 RPP update shows that Cape Codders continue to place great value on the health of the natural environment and historic character as follows:

- 94% of residents cited environmental quality, and
- 68% cited historic character as important in their choice to live on Cape Cod.

Yet over 70% of respondents identified environmental degradation, residential sprawl, and loss of historic character as regional problems. Sixty-eight percent (68%) felt that the Cape was already over developed; a minute 4% felt that the Cape should increase development.

- 68% too much development,
- 4% too little development,
- 28% about the right amount of development.



Cape residents have also come to the region to pursue jobs and economic opportunity (51%) according to the 2005 Cape Cod Resident Survey. Just under a third (1/3) of residents consider the availability of jobs and economic opportunities as one of the top three problems facing their town and the Cape as a whole. When not forced to prioritize, over two-thirds (2/3) of the respondents felt jobs and economic opportunity was a serious local and regional problem.

- 87% of residents also felt there are a lack of jobs and economic opportunity on the Cape today, and
- 89% find housing affordability a problem.

Interestingly, the employed labor force, the number of jobs, and number of businesses on Cape Cod have grown at a faster rate than the state and the nation. Wages have also grown, but at a slower rate than the state and nation; the average wage in 2005 on the Cape was $35,123, versus $50,095 in Massachusetts and $40,667 in the U.S. This discrepancy between peoples' experience and the data suggests a mismatch between the jobs created and the type of employment needed to live on the Cape.

Residents also showed strong support for traditional small businesses (89%). The Cape Cod Residents Survey suggests that we understand the importance of small local business and traded industries to the health of the Cape's economy. Seventy-five percent (75%) of respondents supported or strongly supported neighborhood businesses, while only 29% similarly supported large discount stores.

The 2005 Cape Cod Residents Survey indicates that most people living on the Cape understand the risks posed by generic forms of development. Over half of the respondents specifically opposed certain types of development:

- 75% opposed large shopping malls,
- 60% opposed roadside shopping plazas,
- 51% opposed large discount stores (an additional 20% were unsure)
- 67% were unsure or opposed large supermarkets, and
- 64% opposed national fast-food chain restaurants.

The Cape Cod Residents survey supports a focus on emerging and traditional industries. Residents supported or strongly supported the development of cultural facilities (79%), technology firms (75%), and light industry (70%). Residents also strongly supported the traditional industry sector of fin-fishing, shell-fishing, and aquaculture with over 90% of respondents asking the Commission to encourage or enhance the sector. Projects to enhance these traditional industries have also been identified in the CEDS as priority projects.

Tourism related development and economic development focus did not receive similar support from residents. In terms of Commission priorities, while 21% of residents felt tourism should be a high priority for the Commission more residents felt it be a moderate priority (39%) or a low priority (40%). The majority of residents opposed further development related to tourism:

- 56% opposed the development of a new 50-room motel or hotel
- 55% opposed the development of mini-golf or similar recreation facilities
- 51% opposed the development of new golf courses
- 61% were either unsure or opposed the development of a new 100 boat marina
- 65% opposed a gambling casino

The Regional Priority Projects identified in the CEDS Action plan reflect resident opinions; picking up on similar themes of supporting traditional industries while venturing into emerging sectors were the Cape has natural advantages based on its location, reputation, and workforce. The Priority Projects do support the core industry of tourism indirectly by improving the region's infrastructure capacity, rehabilitating its natural environment, and creating opportunities for existing tourism based businesses to improve their facilities and reduce their overhead costs through energy efficiency and distributed energy generation options. Where development is contemplated it is usually within those areas designated for growth by the Regional Land Use Vision Map. There are no Regional Priority Projects that propose large scale retail development, suburban style housing, or office park development.

Quick Facts

Barnstable County consists of the 15 towns which, as a group, make up the region called Cape Cod. 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(2008)	221,049	6,497,967	304,059,724
Growth (%) Since 1990	18.5%	8.0%	22.2%
Growth (%) Since 1970	128.7%	14.2%	49.6%
Upland Land Area (in sq. miles)	395.5	7,840.0	3,537,438.4
Population Density (2008)	558.9	828.8	86.0
% Reporting One Race Only (2000)	98.3%	97.7%	97.6%
% Reporting Only African American (2000)	1.8%	5.4%	12.3%
% Reporting Hispanic (of any race) (2000)	1.3%	6.8%	12.5%
Households (2000)	94,822	2,443,580	105,480,101
Labor Force (2008)	121,010	3,424,018	154,287,000
Unemployment Rate (2008)	5.8	5.3	5.8
Total Average Wage (2007 by place of work)	$37,691	$55,244	$44,458
Per Capita Personal Income (PCPI) (2007)	$47,640	$48,995	$38,615
10 Year PCPI Growth (%) adj. for inflation	21.0%	24.4%	18.0%
Poverty Rate (2005)	7.1	10.3	13.3
H.S. Diploma or More - % of Adults 25+ (2000)	91.8%	84.8%	80.4%

Description of the Cape Cod Regional Economy

The majority of jobs on Cape Cod in 2007are in two sectors closely tied to tourism: retail (18%) and accommodations & food service (15%). The average annual wage in the retail sector is $27,557, while average wages in accommodations & food service is $19,829 annually. The 2007 county average wage was $37, 691. 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 related to tourism and second homeowners, particularly on the Outer Cape where the year-round population remains relatively small.

Industry Overview (2007) (By Place of Work)	**Barnstable County**		**Massachusetts**		**United States**	
Covered Employment	Jobs	Avg. Wage	Jobs	Avg. Wage	Jobs	Avg. Wage
Total	92,642	$37,691	3,234,357	$55,244	135,366,106	$44,458
Manufacturing	2.4%	$49,805	9.1%	$69,573	10.3%	$53,544
Transportation and Warehousing	2.5%	$37,519	2.9%	$44,767	4.0%	$44,618
Retail Trade	17.7%	$27,557	10.8%	$27,599	11.5%	$26,120
Health Care, Social Assist. - % of all jobs	15.9%	$43,439	15.1%	$47,441	12.5%	$41,202
Finance and Insurance	2.4%	$61,392	5.6%	$116,070	4.4%	$84,858
Professional Services	4.8%	$58,126	7.7%	$93,006	5.7%	$71,992
Accommodations & Food Service	15.2%	$19,829	7.9%	$18,840	8.5%	$16,415

The third largest industry in terms of employment is health care and social services (15.5%), with an annual average wage of $43,439 in 2007. 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.

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, which we have done through our recent CEDS planning process.

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.

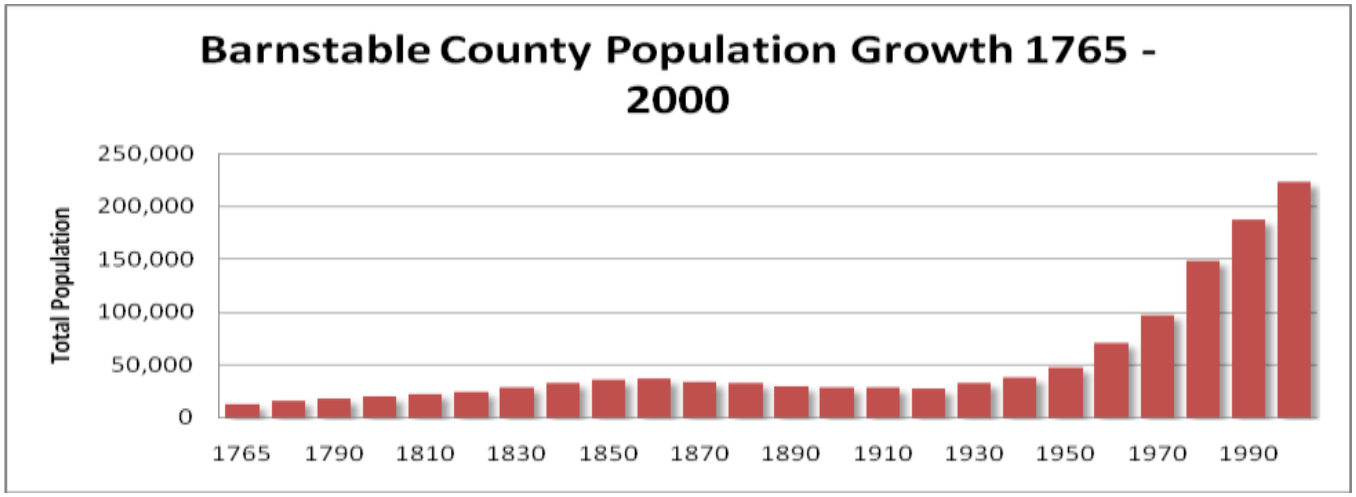
Local service sectors are generally understood to circulate money within the local economy. Yet, local service sectors can also have a role in economic growth through local business ownership and the provision of goods and services locally that were previously purchased outside the region. Luckily for 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.

Data Trends

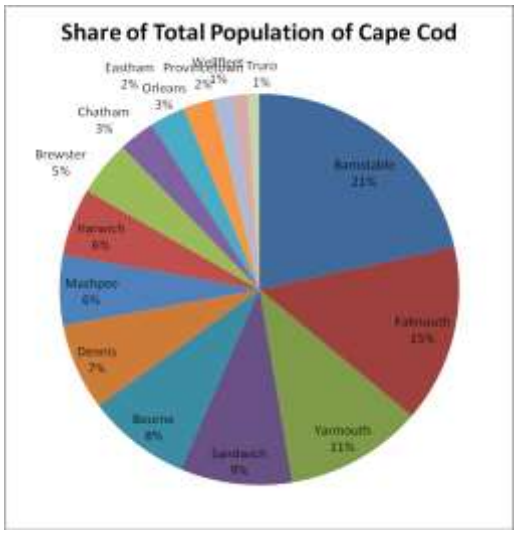
From an economic development perspective, there are several key trends that make the area unique. Only those that have the greatest influence on the strength and sustainability of the region's economy are covered here. A more detailed analysis, titled *Cape Trends,* has been included in Appendix 3 along with a profile of the county generated from the STATS Cape Cod website that is currently under development.

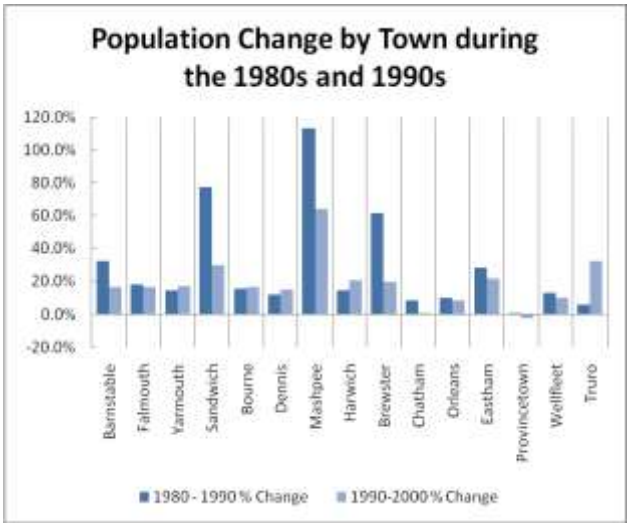
✯ Population: Cape Cod experienced extraordinarily rapid population growth beginning in the 1970's through 2003. Population estimates since 2003 indicate the population has reverted back to 2000 levels. Actual population change will not be known until the 2010 Census is completed.

Population Over Time	Barnstable County, MA	Massachusetts	United States
2008 (Estimate)	221,049	6,497,967	304,059,724
2000	222,230	6,349,097	281,421,906
1990	186,605	6,016,425	248,790,925
1980	147,925	5,737,093	226,542,250
1970	96,656	5,689,170	203,302,037
1990 to 2000 % change	19.1%	5.5%	13.1%
1980 to 2000 % change	50.2%	10.7%	24.2%
1970 to 2000 % change	129.9%	11.6%	38.4%

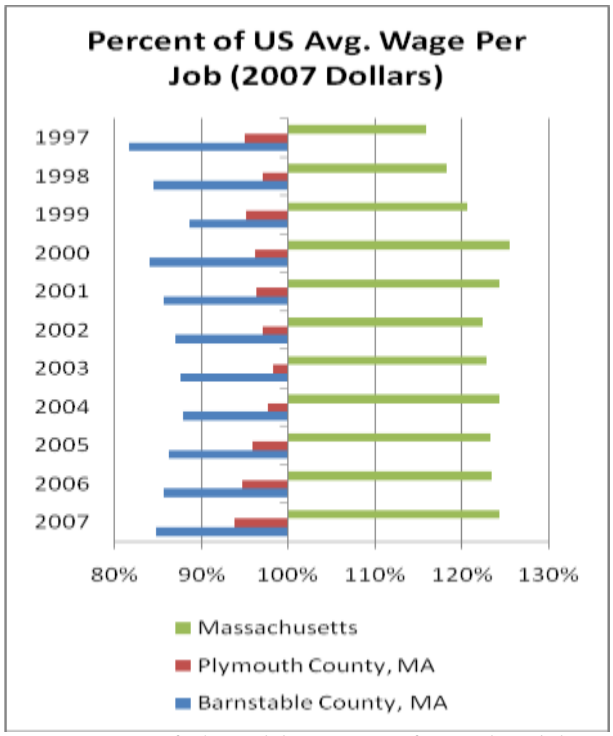


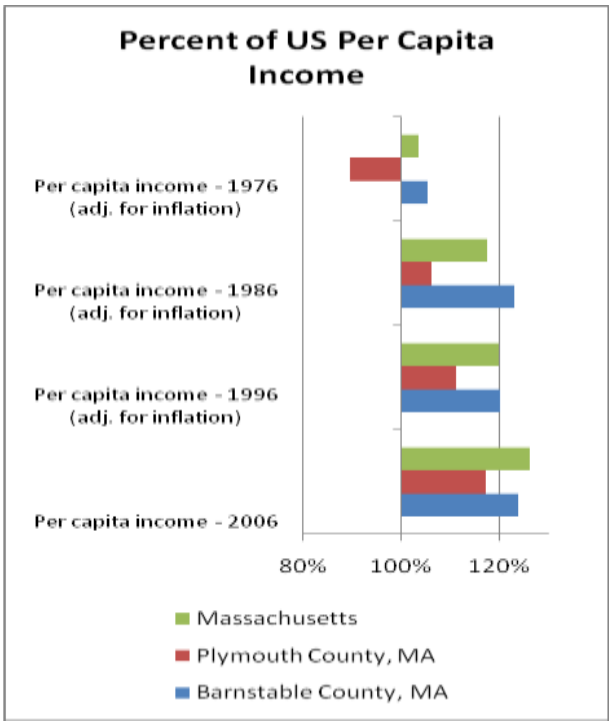
The towns of Sandwich and Mashpee on the Upper Cape have seen the most growth in prior decades. These two towns also have a large commuting population.





- Wages & Income: Data on local wages paid and data on personal income paint different pictures of the monetary wellbeing of Cape Cod residents; wages are dramatically lower than statewide wages and neighboring Plymouth County wages and yet, personal income per capita on the Cape is comparable to the state and above Plymouth County. This trend suggests that while wealthy people may live on Cape Cod that wealth was probably not earned on Cape Cod.





Sources: US Bureau of Labor Statistics, US Bureau of Economic Analysis

The amount of personal income derived from employment earnings has declined by 15% on average since 1969. This trend coincides with rapid population growth during the 1970s, 80s, and 90s and suggests that new residents were not coming to the Cape to work but more likely to retire on income derived from social security and dividend from retirement plans.

Sources: US Bureau of Economic Analysis

✯ Housing Affordability: The rate of increase in housing prices on Cape Cod over the past ten years has been extraordinary, pricing many people earning middle incomes out of the market.

CAPE COD HOMEOWNERHSIP AFFORDABILITY GAP					
Year	Median Price	% Increase	Median Family Income	Income Needed to by Median Priced Home	Affordability Gap
1997	$125,000		$44,700	$39,500	($5,200)
1998	$135,000	8.00%	$44,700	$40,925	($3,775)
1999	$147,900	9.60%	$46,300	$46,750	$450
2000	$176,000	19.00%	$47,700	$57,890	$10,190
2001	$219,850	24.90%	$51,700	$66,640	$14,940
2002	$265,950	21.00%	$56,500	$77,275	$20,775
2003	$310,000	16.60%	$58,700	$84,900	$26,200
2004	$353,225	13.90%	$61,800	$96,500	$34,700
2005	$379,900	7.60%	$65,650	$104,460	$38,810
2006	$369,000	-2.90%	$66,800	$106,400	$39,600
2007	**$346,900**	**-6.00%**	**$70,400**	**$99,350**	**$28,950**

Sources: Bankers & Tradesman; Department of Housing and Urban Development

Assumptions: 5% down payment; 30% housing ratio; Freddie Mac annual average mortgage rate; real estate taxes, house insurance, and PMI at 1.5% of sales price

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

HOUSING COSTS RELATIVE TO HOUSEHOLD INCOME 2000 CENSUS				
Housing Costs as % of Household Income	Owner-Occupied Households			
	Barnstable County		Massachusetts	
	Number	Share of Total	Number	Share of Total
Below 15%	24,305	36.30%	397,028	33.40%
15%-19.9%	10,757	16.10%	214,224	18.00%
20%-24.9%	8,832	13.20%	178,705	15.00%
25%-29.9%	6,233	9.30%	121,955	10.30%
30%-34.9%	4,173	6.20%	76,471	6.40%
35%+	12,248	18.30%	192,836	16.20%
Not Computed	473	0.70%	6,652	0.60%
TOTAL	67,021	100.00%	1,187,871	100.00%

Source: U.S. Census 2000

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

PERCENT OF HOUSING COSING 35% OR LESS OF HOUSEHOLD INCOME BY TOWN			
Location	Median Value of Owner Occupied Housing	Share of Total Housing Costing 35% or more of Household Income	
		Owner Occupied Housing	Rental Housing
Barnstable	$171,500	19.90%	34.00%
Bourne	166,100	20.60%	26.90%

PERCENT OF HOUSING COSING 35% OR LESS OF HOUSEHOLD INCOME BY TOWN			
Location	Median Value of Owner Occupied Housing	Share of Total Housing Costing 35% or more of Household Income	
		Owner Occupied Housing	Rental Housing
Brewster	198,500	17.30%	26.40%
Chatham	273,900	14.30%	26.70%
Dennis	175,100	17.60%	31.80%
Eastham	192,300	15.40%	26.60%
Falmouth	181,500	16.20%	32.20%
Harwich	183,000	20.10%	23.30%
Mashpee	168,900	18.90%	31.50%
Orleans	300,700	17.00%	22.00%
Provincetown	323,600	28.40%	40.70%
Sandwich	178,000	18.90%	22.70%
Truro	286,500	23.90%	19.80%
Wellfleet	242,700	21.30%	24.30%
Yarmouth	151,200	16.50%	32.30%
Barnstable Co.	**$178,800**	**18.30%**	**30.50%**
Massachusetts	**$185,700**	**16.20%**	**28.60%**

Source: U.S. Census 2000

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.[1] Nearly a quarter of Barnstable County residents (24.2%) are classified as living in "working poor" households.[2] Overall, poverty levels are lower in Barnstable County than either state of national levels, but two population sub-groups show higher than expected poverty levels: families with children and households with persons age 65 or older.[3]

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

[1] *Monitoring the Human Condition on Cape Cod Study*, Barnstable County Department of Human Services
[2] Ibid
[3] US Census Bureau, American Community Survey – 2007, Selected Economic Characteristics: 2007.

problems paying for adequate amounts of nutritious food.[4] An estimated 42,000 County residents lack health care insurance and over 3,500 of this number are children under the age of 18.[5]

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.[6] 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[7] 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.[8] 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).[9] 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.

Low-incomes on Cape Cod have led to high percentages of free lunches being fed to school age children in selected areas of the Cape. In the Dennis-Yarmouth School District 27.9% of school age children are receiving free lunches based on income eligibility. In the Town of Barnstable 20.7% of all school age children are receiving free lunches. Looking at the region as a whole, eight out of fifteen towns have free lunch rates greater than 11%.

✯ Housing Affordability

When Median Family Income for 2006 was compared to the cost of housing for that year (Median Priced Home), there was an affordability gap of $39,600.[10] Similar affordability gaps were evidenced for all years between 2002 and 2007. In 2008 the affordability gap decreased by 50% ($19,600) as a result of a gradual increase in Median Family Income over the past decade—Median Family Income has risen from $44,700 in

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[4] *Monitoring the Human Condition on Cape Cod Study, Barnstable County Department of Human Services*
[5] Ibid
[6] *Labor Market Developments in the Cape Cod and Islands Region: Massachusetts Regional Workforce Strategies Initiative*, Neeta Fogg, Center for Labor Market Studies, Northeastern University
[7] Department of Housing and Urban Development (Family Income defined as income resulting from households having two or more individuals related by blood.)
[8] *Monitoring the Human Condition on Cape Cod Study, Barnstable County Department of Human Services*
[9] US Census Bureau, 2007 American Community Survey 1-Year Estimates
[10] *Cape Home Ownership and Affordability Gap 1997-2008*, analysis by the Barnstable County HOME Consortium; Assumes 5% downpayment, 30% housing ratio, Freddie Mac national 30-year fixed annual average mortgage rate, real estate taxes, home insurance and PMI at 1.5% of sales price.

1998 to $73,500 in 2008--and a slight decrease in housing costs from $106,400 in 2006 to $93,600 in 2008. Rising housing costs have been dramatically influenced by the 2nd home owner market on Cape Cod and the large numbers of retirees that have relocated to Cape Cod. The current economic situation is keeping housing prices depressed but it is anticipated that once the recession is past housing prices will rise again driven primarily by the Cape's appeal as a good place to retire.

✯ Unemployment

Unemployment in Barnstable County is influenced greatly by the seasonality of the Cape's summer tourist season with employers either eliminating or reducing staff during the fall, winter, and spring and rehiring beginning in late spring. The Lower/Outer Cape in particular experiences high unemployment during the off-season commonly reaching into the double digits. Historically, Provincetown's unemployment rate is commonly well above 20% for six months out of the year and Truro hovers well above 10% for four to six months out of the year. The Average Annual Rate of Unemployment for the Lower/Outer Cape from May 2008 through April 2009 was 7-10% while the average rate for Provincetown was a consistent 10%.[11]

Labor Force **Annual Averages in 2008**	Barnstable County, MA	Massachusetts	United States
Total Labor Force	121,010	3,424,018	154,287,000
5-year % change	-0.7%	0.5%	5.3%
10-year % change	13.5%	3.1%	12.1%
Employed	114,040	3,243,779	145,362,000
5-year % change	-1.2%	1.1%	5.5%
10-year % change	12.6%	1.1%	10.6%
Unemployed	6,970	180,239	8,924,000
5-year % change	8.7%	-8.8%	1.7%
10-year % change	30.4%	60.0%	43.7%
Unemployment Rate	5.8	5.3	5.8
5-year % change	9.4%	-8.6%	-3.3%
10-year % change	16.0%	55.9%	28.9%

Consistent with recent national and state unemployment trends hinging on a weak economy, the unemployment rate for the Barnstable Metropolitan Statistical Area (MSA) (includes all Cape Cod) has recently soared above what would be expected for this time of year. In May 2007, for instance, the unemployment rate for the Barnstable MSA was 4.3% while the state's rate was 4.5%. In May 2008 the rate for the MSA was 4.8% while the state posted a 4.9% rate. These rates are in-line with the 3.5% rate posted for the MSA in May 1999 and the 3.3% rate posted for the state in that year. *The MSA's unemployment rate for May 2009, however, was recorded at 7.8% while the state came in with an 8.2% rate.*

✯ Population

The Median Age on Cape Cod is 46.3 years as compared to a Median Age of 38.5 years for the state. Individuals 65 and over make up nearly one-quarter (23.6%) of the Cape's population compared to 13.3% for Massachusetts.[12] Looking at the percentage distribution of the working-age population by age, individuals 65 years and older make up 26% of the working-age population on Cape Cod compared to

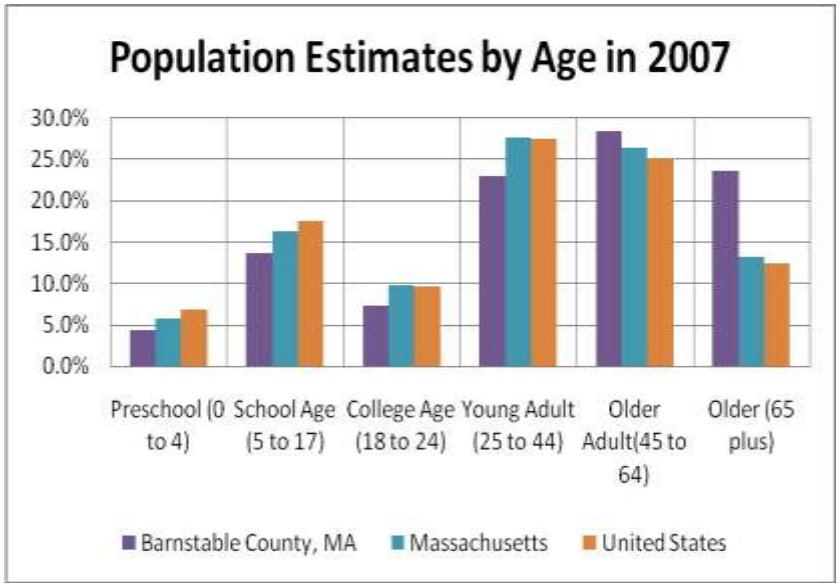
[11] USBureau of Labor Statistics, Minor Civil Divisions 2008, Local Area Unemployment Statistics, May '08-April '09.
[12] STATS Indiana – USA Counties in Profile 2007

16.3% statewide and 15.6% nationally.[13] Cape Cod's 55-64 age group also outpaces both the state and the nation (15.1% compared to 13.8% and 13.7% respectively). All age groups on Cape Cod under 55 years of age are under-represented on Cape Cod as compared to the same age groups expressed as a percentage of either the state or the nation's population. A major reason for the age disparity is the lack of higher paying job opportunities on the Cape adequate to support younger workers and their families.

Life on Cape Cod is often imagined to be idyllic and for many it is but not for everyone. Second-home owners, visitors, and retirees often experience a very different Cape Cod than the residents in the local workforce. Attempting to earn a living on Cape Cod, where employer wages are low relative to the state and nation and the cost of living ever more expensive can be feat that not everyone is able to achieve. The differences in ability and willingness to pay for housing has been one example of how this dynamic can threaten long-term economic sustainability. Recent population estimates indicate that the working age population, particularly those under 35, may be leaving the region.

Population Estimates by Age in 2007	Barnstable County, MA	Massachusetts	United States
Total Population 2008 (Estimate)	221,049	6,497,967	304,059,724
Preschool (0 to 4)	4.3%	5.8%	6.8%
School Age (5 to 17)	13.7%	16.3%	17.5%
College Age (18 to 24)	7.3%	9.9%	9.7%
Young Adult (25 to 44)	23.1%	27.7%	27.5%
Older Adult(45 to 64)	28.5%	26.5%	25.2%
Older (65 plus)	23.7%	13.2%	12.5%
Median Age	46.3	38.5	36.7

Source: US Census Bureau; Median age calculated by the IBRC.



At the same time, the Baby Boom generation is rapidly reaching retirement age and, according to a Second Homeowner Survey completed by the Commission in 2008, the majority of 2nd home owners are of this generation and 22% of them plan to move to the Cape permanently within the next 15 years. These trends could have severe consequences on the future economy of Cape Cod, limiting many of the opportunities for diversification sought in the CEDS itself. These trends beg the question of how the regional economy will function when the resident population of primarily outside the workforce demanding services of a workforce that cannot actually afford to work and live inside the region. This is the ironic struggle many tourism/retirement communities and regions

[13] Labor Market Developments in the Cape Cod and Islands Region: Massachusetts Regional Workforce Strategies Initiative, November 2008, Neeta Fogg, Center for Labor Market Studies, Northeastern University

confront today in their attractiveness to wealth generated from outside rather than within the area – the seeming benefits of tourism of an export industry (drawing money into the regional economy) have the affect of pricing out economic opportunities more typical to a year-round economy.

Military Base Realignment: The Massachusetts Military Reservation (MMR) covers nearly 21,000 acres – approximately 30 square miles. The MMR includes parts of the towns of Bourne, Mashpee, and Sandwich, and abuts the town of Falmouth. The base is occupied by five military commands:

- Massachusetts Army National Guard at Camp Edwards,
- Massachusetts Air National Guard (102nd Fighter Wing) at Otis Air National Guard Base,
- 253rd Combat Communications Group, also at Otis Air National Guard Base,
- 6th Space Warning Squadron phased array radar site at Cape Cod Air Force Station,
- U.S. Coast Guard at Air Station Cape Cod.

The northern 15,000 acres of the MMR is the largest piece of undeveloped land on Cape Cod and is home to 37 state-listed endangered species living in a variety of habitats throughout the base. The MMR also sits atop an underground aquifer that supplies drinking water to Cape Cod. This 15,000-acre area, including most of Camp Edwards' training area, is designated as the Upper Cape Water Supply Reserve (the Reserve). The purpose of the Reserve, created by Chapter 47 of the Massachusetts Acts of 2002, is to ensure permanent protection of the drinking water supply and wildlife habitat, while allowing compatible military training.

The MMR was used heavily by many branches of the armed services dating back to its creation in the 1930s. Most of the industrial activities associated with military use were located in the southern portions of the reservation. In 1989, the MMR was added to the U.S. Environmental Protection Agency's National Priority List (Superfund). This designation meant that the contamination at the Reservation was a serious threat to the public and environment and its cleanup required EPA oversight.

Three programs are at work cleaning up and protecting the environmental resources on and under the MMR. The Air Force Center for Engineering and the Environment's Installation Restoration Program is responsible for the investigation and cleanup of soil and groundwater contamination from past military practices. The U.S. Army Environmental Command's Impact Area Groundwater Study Program manages the investigation and cleanup of groundwater contamination and its sources on and emanating from the northern 15,000 acres. The Massachusetts National Guard Environmental & Readiness Center is dedicated to conducting all training at the MMR in a manner that is protective of the environment now and in the future.

As part of the 2005 Defense Base Closure and Realignment Commission's (BRAC) process closure of Otis was contemplated but ultimately only the Air National Guard command was realigned. Operational control of the MMR airfield at Otis Air National Guard Base was officially transferred to the Coast Guard on October 2, 2008. In addition, the fifteen F-15 aircraft assigned to the 102d Fighter Wing at Otis Air National Guard base were redistributed to Barnes Municipal Airport Air Guard Station in Westfield, MA. An economic impact analysis of the 102d Fighter Wing was completed during the BRAC process and is included in Appendix 10. The Air National Guard is currently evaluating new missions for Otis Air National Guard base.

Susceptibility to Natural Disaster: Cape Cod encompasses 412.42 square miles (approximately 236,930 acres) and is surrounded by the waters of the Cape Cod Canal, Cape Cod Bay, Atlantic Ocean, Nantucket Sound, and Vineyard Sound. Effectively, Cape Cod is an island connected to the mainland only by two four-lane bridges and a seldom used train bridge.

Of the Cape's 412.42 square miles:

- 396 square miles (253,440 acres) are upland
- 166.88 square miles (106,804.1 acres) are in an identified wildfire risk area
- 71.96 square miles (46,056.41 acres) are in a Flood Insurance Rate Map (FIRM) zone
- 93.02 square miles (59,529.66 acres) are in a zone of potential sea, lake, and overland surges by hurricanes (SLOSH14).

The Natural Hazards Pre-Disaster Mitigation Plan, completed for Barnstable County on October 27, 2004 reported that Cape Cod is subject to the following types of events:

- Hurricanes — which can cause hazards such as flooding and storm surge, shoreline change (episodic erosion), wind, and tornadoes
- Sea level rise — which can cause shoreline change, long-term coastal erosion, and flooding
- Winter storms / Nor'easters — which can cause wind, snow and ice accumulation, shoreline change (episodic erosion), and flooding
- Drought — which can contribute to the risk of wildfires
- Tornadoes
- Earthquakes

The Hurricane of 1938

The 1938 Hurricane struck on September 21 at a high tide that coincided with the highest astronomical tide of the year, pushing a storm surge of 12 to 15 feet across the south coast and up its many bays and inlets. The destructive power of the storm surge wiped away entire villages along the shoreline. Sections of Falmouth and New Bedford were submerged under as much as 8 feet of water. Buzzards Bay Taylor Point was reduced to timbers.

Winds of over 120 miles per hour blew across the coastal regions. Extensive damage occurred to roofs, trees, and crops. Widespread power outages occurred, which in some areas lasted several weeks. This powerful storm caused 564 deaths and over 1,700 injuries. Nearly 9,000 homes and businesses were destroyed with over 15,000 damaged. Damage to the fishing fleets in southern New England was catastrophic, with a total of 2,605

Of all the natural threats that might affect Cape Cod, hurricanes have the potential to cause the most property damage and loss of life. The Atlantic hurricane season runs from June 1st through November 30th. Based on the number and intensity of storms, mid-August through mid-October is defined as the peak period; also the zenith of Cape Cod's tourist season.

Often worse than the Hurricane itself are the accompanying tornadoes and storm surge. Tornadoes may form in the rain bands of a hurricane and cause significant damage. There were four reports of tornadoes on Cape Cod as Hurricane Bob came ashore. Rapidly rising storm surge is the hurricane's main threat to life. Storm surge is a dome of water that moves ashore to the right of the hurricane eyewall. It can be the primary risk to life if adequate evacuations are not done. In the case of Cape Cod Bay, storm surge will actually affect the shoreline, and particularly Wellfleet Harbor, shortly *after* the storm has passed.

Two of the worst hurricanes to affect Cape Cod and the Islands were the Great New England Hurricane of 1938 (see text box), which caused severe damage to the Upper Cape, and the Great Atlantic Hurricane of 1944, which heavily damaged the Middle and Lower Cape. It is not uncommon for New England to be impacted more than once in a given season. The Cape has been impacted by two or more tropical storms or hurricanes in one season a total of 11 times. The most notable season was 1954, when southeastern Massachusetts faced Hurricanes Carol, Edna, and Hazel. Carol and Edna were each rated as Category 3 storms.

In summary, regional points of vulnerability to natural hazards include:

- Summertime population is *estimated* at 500,000 persons; because this is an estimate, an accurate number of the people that may be vulnerable to a hazard event are unknown.
- 43.2% of year-round residents (or 95,924 people) reside in a SLOSH zone.
- At least a quarter of the people residing in a SLOSH zone are older than 65 years of age
- There are 85 locations at which a locally designated evacuation route intersects with a SLOSH zone.
- There are 179 critical facilities located in a SLOSH zone.
- There are 7 critical facilities located in a wildfire risk area.
- Cape Cod is accessible by vehicle by two four-lane bridges that are often seriously congested.
- There are 125 repetitive loss properties on Cape Cod (as of December 2002).
- There were 188 tidal restrictions identified in Barnstable County (as of December 2001).
- There is one high-hazard dam and ten significant-hazard dams in the County.

The following table, prepared as part of the Natural Hazards Pre-Disaster Mitigation Plan, grades the region's vulnerability based on the geographic breadth of the storm's impact, the probability of being hit by this type of natural hazard over one-hundred years, and the magnitude of the damage likely to occur as a result.

Location of Impacts
1=small (isolated to a town)
2=medium (multiple towns)
3= large (significant part of Barnstable County)

Frequency of Occurrence
0=unlikely (less than 1%)
1=possible (between 1 and 10%)
2=likely (between 10 and 100%)
3=highly likely (near 100%)

Magnitude/Severity of Damage
1=limited (injuries and/or illnesses are treatable with first aid; minor "quality of life" loss; shutdown of critical facilities and services for 24 hours or less; property severely damaged < 10%)
2=significant (injuries and/or illnesses do not result in

Hazard Ranking for Cape Cod, Massachusetts

Type of Hazard	Location	Frequency	Magnitude	Total Hazard Rank (Maximum Score: 10)
Flood	2	3	4	9
Shoreline Change	2	3	4	9
Wildfire	2	2	4	8
Snow& Ice	3	3	2	8
Wind	3	3	2	8
Drought	3	2	1	6
Tornado	1	2	3	6
Earthquake	2	1	2	5

permanent disability; shutdown of several critical facilities for more than one week; property severely damaged <25% and >10%)
3=critical (injuries and/or illnesses result in permanent disability; complete shutdown of critical facilities for at least two weeks; property severely damaged <50%, >25%)
4=catastrophic (multiple deaths; complete shutdown of facilities for 30 days or more; property severely damaged >50%)

Depletion of Natural Resources – Cod/Ground Fishery: The National Marine Fisheries Service 2008 Report to Congress on the status of US Fisheries showed that of the Northeast region's 49 monitored fish stocks, 10 stocks are subject to overfishing, 21 stocks are overfished, and no stocks are approaching an overfished condition. Overfishing has taken its toll on the Cape Cod fishing industry, primarily consisting of small vessel fishing under individual ownership. As stocks became threatened government policies have been established to allow the stocks to regenerate by limiting catch through quotas. The system for the sale of a limited number of fishing permits was adopted as a market-based solution to overfishing. The unintended consequence has been that as prices for permits rise, corporate fishing concerns have begun to crowd-out the independent fishermen unable to afford to buy permits. Other independent fishermen have found it is more lucrative to sell their permits and stop fishing altogether.

Government policies, particularly the implementation of the Magnuson Fishery Conservation and Management Act of 1976, have stemmed the decline of a number of fish stocks. The size of fish caught has also begun to grow since the record low weights of the early 1990s. Yet, other fish stocks are declining rapidly in recent years.

> "Most of the changes in abundance are directly attributable to changes in fishing mortality. For example, increases in biomass of groundfish and flounder occurred during 1975 to 1978 when fishing effort was being reduced by international and domestic management actions. Decreases in abundance began in the early 1980s when fishing effort from domestic fleets substantially increased. The record high levels of fishing effort in the late 1980s and early 1990s resulted in rapid reduction of year classes before they were able to achieve full growth and maturity. Reductions in fishing effort, beginning in the mid-1990s in the New England area, were followed by increases in biomass of several groundfish and flounder stocks, including haddock on Georges Bank and witch flounder in the Gulf of Maine".
>
> - Status of Fishery Resources off the Northeastern US Aggregate Resource and Landings Trends; Updated December 2006

The fishing industry on Cape Cod is not only an important export sector; it is closely linked with our largest sector – tourism – which is also an export industry. The loss of the fishing industry will impact the social and esthetic character of our communities and the size of the regional economy.

CHAPTER 3: CEDS VISION

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

There is a fine balance in regional economics between capitalizing on an area's competitive advantage and having enough economic diversity to withstand changes in the market. The Cape has seen industries come and go with changes in tastes, technology, and the emergence of competitors. Industries that today seem to define the Cape—for example, tourism—could persist or they could die out, as did 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 4: CEDS ACTION PLAN

The Purpose of the CEDS Action Plan

The purpose of the CEDS Action Plan is to lay out a roadmap for the plethora of entities involved in economic development on Cape Cod so they may coordinate their resources to achieve the greatest impact during the window of opportunity afforded by the slowdown in development. The extraordinary rate of population growth and construction over the past four decades has left little time for long-term planning or coordinated action. The building of infrastructure to manage the impacts of growth and provide quality public services has not caught up with the demand. The cost of providing the required infrastructure continues to increase but continues to be deferred to the future, with some still refusing to acknowledge the need. With this CEDS action plan the economic development community has recognized the need for leadership and has joined forces to help the region overcome the imbalances created by years of double digit population growth.

The Structure of the CEDS Action Plan

The CEDS Action Plan centers on regional priorities. The first section outlines the infrastructure issues faced regionally; section two is the set of sixteen regional priority projects. Each regional priority project is described using project forms developed during the planning process; some are more detailed than others reflecting their different stages in development. The next section outlines the ongoing economic development activities in the region including technical assistance programs and major planning initiatives. The final section covers local capital projects.

Regional Priority Issues

The Cape Cod region is faced with a number of infrastructure challenges that are directly related to economic development. These are:

- Minimal Wastewater Management,
- Insufficient Broadband Access & Capacity,
- High Energy Costs & Low Reliability,
- Lack of Housing Affordability, and
- Limited Public Transportation.

Efforts by public, not-for-profit, and business organizations to address these problems are underway but resources to put toward both understanding and fixing these problems are limited.

Wastewater Management: Cape Cod relies on a sole source aquifer for drinking water and on its ponds, bays, and coastal zone for much of its economy. These resources are currently threatened by the region's reliance on septic systems to manage wastewater and the unsustainable levels of phosphorous and nitrogen being released as a result. Without major investments in alternative wastewater management systems, the Cape cannot sustain its current level of development, nor handle additional development. At the same time, if efforts are not made to spread these costs across the region and embrace alternatives to tradition solutions,

the costs of living will lessen economic and demographic diversity and undermine the sense of community and place that has made Cape Cod so special to so many.

Broadband Access & Capacity: Broadband infrastructure with the capacity to move large volumes of information into and out of a region is necessary for that region to be competitive in the world market. Unfortunately, Cape Cod's reputation as a tourist and retirement destination has worked against us in obtaining the kind of symmetrical broadband capacity from necessary for our year-round economy to flourish and diversify. To telecommunications providers Cape Cod is a quaint tourism place with a density problem they see as unprofitable when it comes to providing high-speed last mile services. There are still areas on Cape Cod that are entirely dependent on dial-up service, and even those with high-speed service only have the capacity to move large amounts of data on to their servers but not off them to clients in other parts of the world – the service is not symmetrical.

Energy Costs & Reliability: Rising energy costs have direct and indirect economic implications, beginning with increasing the costs of running a business and a household. Cape Cod has long had the highest energy prices in Massachusetts, and a number of small businesses have reportedly been forced to close their doors during this downturn due to an inability to cover their energy costs. Residents, often living in homes designed for summer living only or in older homes that do not meet current state and national energy code standards, incur even greater energy costs.

As with all hardships, the region's high cost of energy also comes with opportunities. Cape Cod's natural conditions and geography offer real opportunities for the production of clean renewable energy. Reliance on local solar, wind, wave, tidal, geothermal, and bio-energy resources may reduce emissions from on-Cape energy providers, provide a buffer against the fluctuations in supplies and prices in fossil-fuel energy markets, and keep more money in the local economy. Increased use of renewable energy technologies along with a well-trained workforce of local installers and service contractors for conservation, efficiency, and renewable energy systems could help establish an emerging clean-energy cluster as an important component of the regional economy.

Housing Affordability: Since 2000 the median value of single-family homes appreciated nearly 200 percent, while the median family income increased 50 percent. The "affordability gap"—the difference between housing costs and the proportion of one's income that can be reasonably allocated to pay for housing—has become much more severe for renters and home buyers alike. The current recession has done little to redress this imbalance.

The Cape Cod economy, like any economy, relies on a broad range of workers with varying levels of skill, expertise, and income potential. To accommodate the workforce diversity needed for a sustainable regional economy, the region must have a similar diversity in housing alternatives, from affordable housing for the very poor, to workforce housing for the middle-income workers, to more luxurious options for those at the top of the income ladder. Unfortunately, due to a variety of factors - from limited land availability and the popularity of the Cape as a vacation and retirement community to zoning and wastewater issues - housing diversity has sharply declined over the past decade. Key findings in the recently completed Consolidated Plan for Housing, prepared by the Cape Cod Commission for submission to the U.S. Department of Housing and Urban Development (HUD), include the following:

- Barnstable County has an unmet need for affordable housing of approximately 18,500 units[14].
- Decreasing unemployment prior to the recession did not translate into incomes sufficient to purchase or rent available housing.
- During the 1990's, the County added 17,236 households, while adding only 11,891 new housing units. The new units were overwhelmingly owner-occupied, and in fact, the number of occupied rental units declined by 415 during the 1990s.

The Consolidated Plan goes on to identify housing production and assistance performance goals for the next five years. The plan commits to supporting the development of 60 rental units per year and 10 ownership units per year, while also providing assistance for the purchase of 20 units per year and the rehabilitation of 10 units per year. The complete Consolidated Plan can be found on the Cape Cod Commission website at: http://www.capecodcommission.org/housing/HOMEconsortium.htm

Public Transportation: Just as the availability of housing for the region's workforce is essential to the economy, an efficient and widely accessible system of transportation with a diversity of options is essential to the long-term prosperity of the local economy. Maintaining an adequate transportation system is necessary for quality of life, economic vitality, and public safety. It is an important part of the Cape's infrastructure, providing a link between housing, jobs, and shopping areas. Conversely, an inadequate system deters visitors and frustrates residents.

The transportation planning goals of the Regional Policy Plan are based on three issues:

- Transportation safety,
- High-occupancy vehicles/alternative modes of travel, and
- Automobile congestion management.

Respondents to the 2005 Cape Cod Residents Survey identified traffic congestion as a serious or moderate problem for their town (92 percent) and for the Cape as a whole (98 percent) both today and in the future. Traffic volumes have doubled on many Cape Cod roads over the last 10 to 20 years. Indeed, the summer volumes many residents and visitors found so frustrating 20 years ago are the average year-round traffic volumes of today.

At the same time, 80% of respondents to the 2005 Cape Cod Residents Survey cited the availability of public transportation as a serious or moderate problem for their town; 84 percent cited it as a serious or moderate problem for the entire Cape. Providing more bus, rail, and ferry service, better opportunities to bicycle between areas, and more walkable communities are firmly supported by the survey responses. At the regional level, the Cape Cod Commission works with the state, regional agencies (such as the Cape Cod Regional Transit Authority and the Steamship Authority), and towns to provide better bus and ferry services, expand the bicycle path network, and improve the ability of pedestrians to walk safely.

[14] This is the number of low income County households who are paying a disproportionate amount of income for housing and/or are living in overcrowded or substandard conditions. 57% of low-income renters and 51% of low-income owners have some housing problem.

Regional Priority Projects - Summary

The heart of the CEDS Action Plan is the set of sixteen Regional Priority Projects identified by the five CEDS Work Groups made up of representatives from the organizations involved in economic development on Cape Cod. These projects have been determined to be consistent with the Regional Growth Policy and Economic Development Goals. Projects under consideration were evaluated according to the likelyhood that they would:

- Leverage public and private funding
- Create higher-wage and higher-skilled jobs
- Strengthen and expand partnership & collaboration
- Integrate the regional economy into the global market, and
- Encourage entrepreneurship and innovation.

The projects were also judged on their ability to direct growth to economic centers and reduce commercial or residential sprawl while having a positive impact on the Cape's natural resources. Those projects that fared the best relative to these criteria were selected as Regional Priority Projects. They are briefly described below and in more detail on the individual project forms following this summary.

The themes that run through these projects reflect the region's major economic development issues discussed in the previous section and the views of the residents described at the beginning of Chapter 2: CEDS Context. In many cases, these projects build on each other and they are all focused on moving Cape Cod forward in a sustainable manner that is reflective of the region's economic advantages in the marketplace, not least of which is its natural beauty and sense of heritage. Protecting these competitive advantages while building new economic opportunities based on them is the combined goal of these projects as a group and individually.

CAPITAL PROJECTS

- Community Green Enterprise Center Design & Construction

  Community Green will be a sustainable community on 45 acres of land in Sandwich, where formerly homeless and low-income individuals and families will have access to vocational training and employment in the fields of renewable energy, agriculture, and the culinary arts with the educational and business partners located at the Community Green Enterprise Center.
- Emerging Sectors Housing Program

  Identify opportunities to support emerging industries such as education, marine sciences, and the arts by reducing barriers imposed by the high cost of housing on Cape Cod. Initial projects may include student/faculty housing at the Cape Cod Community College or other educational entities and artist live/work space in economic centers.
- Homeland Security & Marine Security Technology Testing & Training Center

  Establish a Homeland Security Center on the MMR to provide scenario based training for military and local public safety providers and to stimulate innovation, research, and technology transfer in marine security through technology testing programs.
- Open Cape Telecommunication Infrastructure

Create a reliable, secure communications backhaul network from Woods Hole to Provincetown with capacity to transport large amounts of data on and off-Cape; a microwave and fiber network to enhance education, research, and economic development on a daily basis, and to provide a redundant emergency communications network in times of crisis.

- Renewable Energy Generation Program

  Phase 1 will be an algae bio-fuel refinery pilot project. The project, advocated by Cape Cod Renewable Fuels Partnership, is expected to produce 1 million gallons of bio-fuels annually. Future phases will investigate off-shore renewable energy opportunities.
- Renewable Energy Technology Testing & Training Center

  Phase 1: Assess need for a 3rd party testing site for small- and mid-scale wind applications (up to 600 kilowatts in scale) with complementary training and research opportunities for engineers, technicians and educators in partnership with academia. Phase 2: Assess need for testing in other areas of renewable energy technology development.
- Wastewater Infrastructure in Economic Centers & Villages

  Design and build wastewater infrastructure in those areas designated for mixed-use development and redevelopment where greater population density is desired.

PLANNING PROJECTS

- Coastal Use Templates for Economic Development

  Complete a baseline analysis of access, land uses, and economic activity along the Cape's coastline. Based on this research and through a public process, develop a series of options for coastal development and redevelopment on Cape Cod that will leverage the summer season to provide employment and business opportunities year-round and reinforce the Cape's historic connection to the sea.
- Development in Economic Centers - Cost Analysis

  Identify the factors making development and redevelopment more expensive in downtown centers than in outlying areas; design incentives to recalibrate this cost differential in order to shift growth to economic centers and reduce the higher infrastructure costs associated with sprawl.
- Redevelopment Authority - Feasibility Analysis

  Complete a feasibility analysis of regional or local redevelopment entities to facilitate development in areas designated for growth through the acquisition and sale of land or property rights.
- Specialized Four-year College - Feasibility Analysis

  Establish an independent or affiliated undergraduate institution offering a limited number of degree programs in specialties related to the region's emerging industries and natural resources such as engineering, environmental science, and fine arts with associated Cape-focused research centers.

TECHNICAL ASSISTANCE PROJECTS

- ADA & Building Compliance Loan Program

  Establish a regional revolving loan fund for low-interest financing of ADA and building code compliant renovations to improve the commercial building stock and encourage multi-story development and top-of-the-shop expansion in growth centers.

- 'Buy Local' Infrastructure Development Program

  Fund projects to increase local production of goods and services and educate buyers on the economic benefits of using local purveyors. Provide capital to expand local production and value added capacity; adopt appropriate protections for productive lands and facilities; train educators, business owners, and the workforce to use local providers whenever possible.
- Capitalize the Cape Cod Fisheries Trust

  Provide capital to fund the Cape Cod Fisheries Trust's purchase of fishing rights for local fishermen. Purchases ensure a lasting future for sustainable fishing on Cape Cod; corporate consolidation through the purchase of a limited fishing quota has increased the cost of remaining in or entering the fishing industry for the independent small boat operators on Cape Cod.
- Energy Demand Reduction Program - Greening Existing Buildings

  Realize immediate and long-term reduction in energy demand through the expansion of existing energy efficiency assistance programs, the establishment of an efficiency betterment loan program, and through a series of demonstration and workforce training projects.
- Entrepreneurship Capital Access & Training Program

  Attract capital, initially focusing on Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) grants to fund existing and start up businesses on the Cape. Strengthen the culture of entrepreneurship through training programs in schools, entrepreneurship workshops, and business plan competitions.

Regional Priority Projects – Individual Priority Project Forms

The following priority project forms were developed with EDA priorities in mind. A project form was completed by the Work Groups for each of the priority projects. The numbering indicates which Work Group identified the project described; the initial indicates the Work Group while the number represents how the group ranked the project out of the maximum of three they were asked to select[15]. The project form asks for a description of the basic elements of the project, the desired outcomes, and measures of progress. The organization to lead project implementation is identified as well as the expected partner organizations.

It will be clear in reviewing these regional priorities that the various projects are at different stages of development. Some, such as Open Cape and the Fisheries Trust, are essentially "shovel ready" and could be fully implemented within year one. Others are more conceptual. Work will begin on these right away but actual implementation will be in future years. Finally, there are some projects, such as Wastewater Infrastructure in Economic Centers, which will occur in increments throughout the five-year timeframe and most likely beyond.

[15] ID = Infrastructure Development; WD = Workforce Development; SD = Sector Development; BD = Business Development; and BC = Business Climate

Priority Number	SD - 001

Priority Project Summary

Project Title	**The Community Green Enterprise Center— Design and Construction**
Goal of the Project	The Community Green will provide housing, job training, and employment to formerly homeless and lower-income people, in a community that has been developed with a focus on sustainability.
Description	The Community Green is a 45+ acre residential and community development in Sandwich, Massachusetts, being built and managed by Housing Assistance Corporation, a non-profit housing organization located in Hyannis, Massachusetts. The Community Green will provide housing, job training, and employment opportunities to formerly homeless residents, lower income residents, and others in the general community utilizing a planned community designed around sustainable practices. The Community Green will: ☆ Offer stable and affordable rental housing; ☆ Be affordable to build and maintain; ☆ Follow green building and land-use design principles; ☆ Serve as an example of attainable energy efficiency and environmentally responsible building practices; ☆ Foster economic development through a community center that offers 1) training and employment opportunities for residents, 2) affordable office and meeting space for clean-energy enterprises, and 3) a meeting place for the broader community; ☆ Focus on job training and employment in the areas of culinary arts, clean energy, and agriculture; ☆ Engage all who live, work, or visit in the spirit of sustainability and the operation of the community; ☆ Serve as a supportive partner for other efforts occurring throughout the region involving clean energy. The Community Green's major structural components are approximately 46 units of rental housing, 10 units of single-resident occupancy, and a 20,000-square-foot community center. It will create at least 21 permanent, full-time jobs and approximately 20 ongoing intern/trainee positions. **The Community Green's Enterprise Center** will offer space for job training involving the culinary arts and clean energy as well as leased space for several for-profit and non-profit clean energy businesses. The Center will also provide meeting areas for workshops, classes, demonstrations and conferences related to the culinary arts and clean energy. *The Clean Energy Program* will give entrepreneurs lower-cost space to grow their businesses with the assistance of business incubator support services such as access to meeting space, shared clerical and back office costs, and shared equipment. The primary anchor tenant for the Center will be Housing Assistance Corporation's Energy/Weatherization Department which serves lower-income homeowners and renters across Cape Cod. The Enterprise Center will be a model of energy efficiency and demonstrate clean energy products and practices. It will

	serve as a resource center that will provide information and opportunities for the public to learn how they can become more energy efficient in their own personal and professional lives. *The Culinary Arts Program* will be established in partnership with Zammer Hospitality Institute at Cape Cod Community College. It has four objectives: ☆ Provide meals ☆ Provide job training ☆ Provide permanent employment ☆ Creation of a commercial incubator kitchen that can be leased on a P/T basis by entrepreneurs *The Agriculture Program* will have as a core element a large community garden. Produce from the garden will be sold via farmers markets and local restaurants to help underwrite the cost of the Culinary Arts Program.
Overall Project Benefits	☆ Creation of a major new facility—The Enterprise Center—where workforce training, public education, entrepreneurial activities, and partnership building focusing on clean energy and culinary arts will occur; In addition, the project as a whole will provide: ☆ 46 units of rental housing and 10 units of single resident occupancy; ☆ Job training and employment programs for formerly homeless and lower-income people; ☆ 21 permanent F/T jobs and 20 intern/trainee positions.
Job Creation	Construction: To be determined
	Permanent: 21
Measures of Success	Quantitative: ☆ Construction of The Enterprise Center ☆ Signed leases with anchor tenants ☆ Creation of 21 jobs and 20 intern/trainee positions
	Qualitative: ☆ Successful integration of multiple program components within the Enterprise Center ☆ The Enterprise Center becomes a focal point for significant public education and job training in the areas of culinary arts and clean energy ☆ Formerly homeless individuals acquire useful skills and achieve a new level of independence

Type of Project	Construction
Target Population	☆ Formerly homeless and lower-income families and individuals; ☆ Clean energy entrepreneurs ☆ Culinary entrepreneurs ☆ Non-profit clean energy service providers
Towns Impacted	Town of Sandwich & Region-wide
Lead Organization	Housing Assistance Corporation

Partner Organizations	Cape Cod Community College Cape and Islands Self-Reliance Cape and Islands Renewable Energy Collaborative Town of Sandwich		
Duration	Underway (start & end dates or on-going)		
Total Cost (If on-going insert annual cost)	$6 million for the Enterprise Center	Public Share: 50%	Private Share: 50%

How will this project serve one or more economically distressed populations?
The Enterprise Center will offer direct employment opportunities for formerly homeless and lower-income residents. These populations will also benefit from on-site housing and other program services.

How will this project improve competition within the region?
The Enterprise Center will offer low-rent commercial space for clean energy and culinary businesses. It will provide a much needed facility for conducting workshops, educational forums and seminars, and product demonstrations in the clean energy and culinary arts fields. It will provide a commercial incubator kitchen for start-up culinary arts businesses. These services will help to strengthen entrepreneurial activity and workforce skills in the culinary arts and clean energy fields.

How will this project improve the region's competitive position in the global economy?
The skills training aspect of this project will strengthen the competitiveness of our regional workforce.

How will this project support innovation and entrepreneurship in the region?
Having a physical location where a range of activities relating to clean energy and culinary arts take place and where a nexus between entrepreneurial activity and skills training in both of these areas is established, will highlight the importance of these fields to Cape Cod's present and future economy and act as a catalyst for new business creation, skills acquisition, and job growth.

What products or services will be exported out of the region as a result of this project?
The culinary arts are a key aspect of the Cape's tourism/hospitality sectors and function as an import substitution mechanism for the Cape. Clean energy start-ups, depending on type, have the potential to sell products/services off-Cape thereby increasing the amount of off-Cape dollars that are invested on-Cape.

How will this project increase the availability of clean energy?
The Enterprise Center will aid the expansion of the Cape's clean energy sector through consumer education, partnership building, job training, and new business creation. Each of these elements will help to boost the importance of clean energy as a viable industrial sector on Cape Cod.

How will this project decrease demand for fossil fuels?
Through new partnerships, new businesses, public education, and workforce training the Enterprise Center's Clean Energy Program will help deploy renewable energy applications and energy efficiency improvements throughout the region.

Priority Number	SD - 003

Priority Project Summary

Project Title	**Emerging Industry Housing Program**
Goal of the Project	To help strengthen emerging industry clusters on Cape Cod and establish the region as a creative learning community.
Description	The Regional Policy Plan defines Emerging Industry Clusters as a cluster of industries that: ☆ include similar, related, or complementary businesses; ☆ include mostly early-stage and growth-stage businesses; ☆ benefit from an active interchange of knowledge, technology, and innovation; ☆ share specialized infrastructure, labor markets, and services; and, ☆ sell products and services outside Barnstable County. Specific Emerging Industry Clusters named within the Regional Policy Plan -- marine sciences and technology; arts and culture; information and related technology; renewable and clean energy, and education and knowledge-based industries -- were identified through the Governor's Regional Competitiveness Council using an analysis of the Cape and Islands regional competitiveness completed by Professor Michael E. Porter of the Harvard Business School. A significant barrier to business growth on Cape Cod is the ability to attract and retain skilled workers due to the high cost of housing in the area. The Emerging Industry Housing Program is an effort to address this problem, and has identified two initial projects to provide housing for students, faculty, and artists on Cape Cod. Project A: Higher Education Student & Faculty Housing The high cost of housing on Cape Cod has made it difficult to attract students, teachers, and retain the region's skilled workforce. This project will be one of many efforts to address this issue overall but the only project specifically designed to serve the region's educational institutions and their students and faculty. The educational community on the Cape includes: ☆ Cape Cod Community College ☆ Massachusetts Maritime Academy (4 year undergraduate) ☆ Woods Hole Oceanographic Institute (graduate) ☆ Marine Biological Laboratories (summer, undergraduate, and graduate) ☆ National Graduate School for Quality Management (accredited) ☆ Fine Arts Work Center (Provincetown) ☆ Center for Coastal Studies (Provincetown) ☆ Cape Cod Museum of Art (Dennis) Part 1 of this project would focus on developing housing at the Cape Cod Community College, which has already completed a feasibility study and has a site identified. Part 2 would focus on demand and financial feasibility analysis for student and faculty

	housing elsewhere on the Cape. One such feasibility study would look at housing needs associated with the marine related institutions in Falmouth and Bourne. In this area, the model could include housing for new employees of the small marine science businesses that have developed out of the research institutions in the area. Student/faculty housing needs and opportunities on the Outer Cape would be another area of research. Project B: Artist Live/Work Space – Fenway Studios Replication Project Identify opportunities to create limited-equity cooperative live-work space for artists modeled after the historic Fenway Studio in Boston. The goal would be to enable artists to make a living on Cape Cod and to continue the region's historic success and competitive advantage in the Arts & Culture sector while adding to the vitality of downtown centers. Limited Equity Housing Cooperatives (LEHCs) are business corporations in which residents share ownership of a building. Co-op members work together to reach mutual goals based on democratic control and decision-making. Cooperative residents are typically guided in practices of living together in mutual ownership by the "Rochdale Principles," developed by the International Cooperative Alliance. LEHCs offer ownership opportunities to lower income households while limiting the return from resale that they can receive from the housing. It contrasts with market rate cooperatives, where memberships can be transferred at market value. Limited Equity Housing Cooperatives: ☆ Build member participation in the corporation ☆ Operate as nonprofits ☆ Combine business and social goals ☆ Rely on democratic participation ☆ Create voluntary membership ☆ In the United States, there are more than 400,000 units of limited equity housing A LEHC is one approach to resident-controlled housing. Others include limited equity condominiums, mutual housing associations, co-housing, and community land trusts (CLT). Some of these tools may be combined, such as the LEHC and the community land trust. Some of the best examples of LEHCs occur when apartment building tenants join together to purchase their buildings and share in permanently affordable and democratically-controlled home ownership.
Overall Project Benefits	☆ Ability to attract & retain the workforce needed to serve emerging industry sectors on Cape Cod ☆ Ability to attract & retain younger workforce and population currently underrepresented on Cape Cod ☆ Improve access to education for residents living far from the schools themselves ☆ Improve creative environment for artists while stimulating a sense of vitality in downtown centers
Job Creation	Construction: Project A: 150 construction jobs Project B: TBD
	Permanent: Project A: 5 directly related to the management of the housing facility. Year round and seasonal jobs may also be tied to residents involved in curriculum for hospitality, medical and environmental training programs. Project B: TBD

Measures of Success	Quantitative: Project A: At least 20 year round positions annually Project B: TBD
	Qualitative: Project A: If student housing: Increase availability of trained employees to advance emerging traded clusters such as environmental-tech and healthcare. Reduces reliance on the importation of seasonal workers from overseas to supplement peaks in the summer tourism season (currently around 5,000 workers receive H2B visas to supplement the need for seasonal hospitality workers.) If faculty housing: attraction & retention of qualified faculty to replace retiring professors. Project B: TBD

Type of Project	Project A: Construction Project B: Planning & Construction (Construction – Planning – Technical Assistance)		
Target Population	Project A: Higher Education Students & Faculty Project B: Working Artists		
Towns Impacted	Region-wide		
Lead Organization	Project A: Cape Cod Community College & Dept. of Capital Asset Management for Commonwealth of Massachusetts Project B: Arts Foundation of Cape Cod		
Partner Organizations	Project A: Zammer Hospitality Institute, Cape Cod Chamber of Commerce, Regional Technology Development Center, local employers in technology, healthcare & tourism. Project B: TBD		
Duration	Project A: Construction 18 months from groundbreaking. Currently, sites exist in Barnstable on state land utilized by Cape Cod Community College. Potential sites at Mass Military Reservation in Bourne may be utilized. Construction may start Nov. 2009 and programs begin upon completion of construction in 18 months. Project B: TBD (start & end dates or on-going)		
Total Cost - Project A (If on-going insert annual cost)	Phase 1: $10.7 M Phase 2: $300,000	Public Share: Phase 1: $10.7 M Phase 2: $300,000	Private Share: co-op units may be made available to employers for an investment rate to be determined. ($25,000 annually, perhaps).
Total Cost - Project B (If on-going insert annual cost)		Public Share:	Private Share:

How will this project serve one or more economically distressed populations?
Project A: low income students Project B: low income artists

How will this project improve competition within the region?

How will this project improve the region's competitive position in the global economy?
The 2003 Regional Competitiveness Council determined that both the education and arts sectors are emerging traded cluster that the Cape & Islands have a competitive advantage relative to the larger economy. The region's world renowned reputation around oceanographic and marine sciences would be enhanced by housing dedicated to this cluster. Project A: This project will improve the competitive position of the region by increasing the quality of the tourism workforce to maintain adequate levels of service and by creating a skilled for emerging clusters such as environmental tech and healthcare which offer higher wages than current region average Project B: Retain regions niche in visual and performing arts that is central to the seasonal economy and an important element of the year-round community

How will this project support innovation and entrepreneurship in the region?
The education of and transfer of technology to entrepreneurial entities would be advanced by facilities dedicated to the learning and growth of these entrepreneurs.

What products or services will be exported out of the region as a result of this project?
Tourism is our key export. Environmental Technology and renewable energy technicians may be trained here, yet perform services beyond the region's boundaries.

How will this project increase the availability of clean energy?
Construction and renovation resulting from this program would be designed to be energy efficient and use on-site renewable generation wherever possible.

How will this project decrease demand for fossil fuels?
Housing located on or near education campuses will reduce or eliminate the need for automobile transportation.

Priority Number	WD - 002

Priority Project Summary

Project Title	**Homeland Security & Marine Security Technology Testing & Training Center**
Goal of the Project	Modernize Training Facilities at the Massachusetts Military Reservation (MMR) to better serve the National Guard, Coast Guard, other public safety and law enforcement personnel though the provision of simulated emergency training, defense, particularly marine technology testing and related training for port security and other security related uses
Description	The Massachusetts National Guard has developed a Homeland Security Center Master Plan and is working with Mass Development (a quasi public economic development state agency) on implementation and to identify additional missions compatible with the overall mission of the base. Marine technology testing and associated training is one potential area for the base to expand into that leverages the world-class marine research institutions located on the Cape, the technology businesses that have spun-off from these institutions to commercialize technology developed for research, and the natural assets of Cape Cod that lend themselves to marine technology testing. Additional technologies, such as unmanned aeronautic technology, are also potential homeland security related activities under consideration.
Overall Project Benefits	The project is designed to maximize training and performance of military, Coast Guard and public safety personnel, provide a local venue for training now undertaken out of state, improve the long term viability of the base and build partnerships with the technology sector of the state in order to spin-off new businesses and employment
Job Creation	Construction: TBD
	Permanent: TBD
Measures of Success	Quantitative: TBD
	Qualitative: TBD

Type of Project	Planning
Target Population	Region-wide
Towns Impacted	Mashpee, Bourne, Falmouth, Sandwich and Barnstable
Lead Organization	Massachusetts National Guard

Partner Organizations	United States Coast Guard, Woods Hole Oceanographic Institution, Marine Biological Laboratory, Mass Maritime Academy, Barnstable County		
Duration	On-going		
Total Cost (If on-going insert annual cost)	TBD	Public Share:	Private Share:

How will this project serve one or more economically distressed populations?
By providing a potential source of employment, by stabilizing the tax base

How will this project improve competition within the region?
It will help make the region a center of excellence for innovative homeland security and related training

How will this project improve the region's competitive position in the global economy?
Other states and organizations have expressed a need for this type of facility

How will this project support innovation and entrepreneurship in the region?
It will foster partnerships with the marine science and technology sector

What products or services will be exported out of the region as a result of this project?
Homeland security, port security training, new technologies to support these activities

How will this project increase the availability of clean energy?
Partner members are developing plans for clean, renewable energy at the site.

How will this project decrease demand for fossil fuels?
Over time, it will lessen the demand, by providing a training venue much closer to those who need it and through the development of renewable energy

Priority Number	ALL - 001

Priority Project Summary

Project Title	**Open Cape Telecommunications Infrastructure**
Goal of the Project	To build vital telecommunications capacity and core broadband infrastructure that will enhance education, research, and economic development on a daily basis, and will provide a redundant emergency communications network in times of crisis.
Description	✯ Build capacity by establishing an open access fiber and wireless backhaul network spanning the entire Cape and connecting to core Internet backbones in Providence and Boston; ✯ Establish a regional datacenter; ✯ Oversee the ongoing maintenance and operations of this infrastructure via a contracted operator; ✯ Collaborate with regional organizations to help the public sector leverage the infrastructure for regional benefit.
Overall Project Benefits	Investment in infrastructure is important for multiple reasons. Economic. In the 20th century, the rise of the interstate highway system became the key economic driver, facilitating the exchange of goods and services and connecting markets. In the 21st century, this role is played by broadband data infrastructure. A robust broadband data infrastructure is essential to the economic survival of towns, cities, and entire regions today and in the future. Public safety. The Cape, Islands, and South Coast are the most vulnerable regions in Massachusetts to natural disasters, such as a hurricane. The region's proximity to the Plymouth nuclear power plant adds to this vulnerability. One of the lessons from Katrina and other major natural disasters is that communication infrastructure is key to both response and recovery. Cape Cod lacks the robust and redundant system of communications it will need to respond to and recover from a natural or man-made disaster. Not only will the OpenCape network perform a daily economic role, but it will also serve as the redundant communications backbone in times of emergency. Civic. Congress recognized the importance of broadband in Section 706 of the 1996 Telecommunications Act which says the FCC is to "encourage the deployment on a reasonable and timely basis of advanced telecommunications capability to all Americans." In 2009 broadband became a priority of the new presidential administration. As the FCC writes: *Broadband technology is a key driver of economic growth. The ability to share large amounts of information at ever-greater speeds increases productivity, facilitates commerce, and drives innovation. Broadband is changing how we communicate with each other, how and where we work, how we educate our children, and how we entertain ourselves. Broadband is particularly critical in rural areas, where advanced communications can shrink the distances that isolate remote communities.*

	OpenCape is a specific application of this mandate, serving the Cape Cod region.
Job Creation	Construction: direct – direct Engineering 3 Man Year; Project Management 3 Man Year; Administrative 2 Man Year; Network Physical Layer Construction 8 Man Years; Node Construction 2 Man Year; Microwave Construction 1 Man Year; Network Switching and Routing 1 Man Year. Total 18 Man Years
	Permanent: direct: Network Operations 3 Man Year; Network Management 1 Man Year; Network Administration 1 Man Year; Network Repair 1 Man Year. Indirect: 10-20 1st 24 months; 10 - 48 months
Measures of Success	Quantitative: The successful creation and on-going operation of a regional wholesale digital backhaul communications network that provides competitive options at the same or better level as those services found in a metropolitan zone.
	Qualitative: The ability for enterprises to have access to the connectivity they need to function at an affordable price; the core underpinning tools for municipalities to deploy regional umbrella services for regional benefit; the ability for small businesses to have access to business class broadband services at a competitive rate, and for residents to have multiple options for broadband access; the ability for businesses to grow and expand in the region without the gating factor of lack of connectivity; growth in the number or remote workers who can derive income while living and working in the region due to the ability to telecommute effectively; an increase in business tax base as companies are able to realistically compete from the region; improved medical services through the broadband-enabled functions of tools like remote diagnostics and teleradiology; improved educational access for K-12 students creating a stronger draw for professional families to locate in the region and created a stronger future workforce for the 21st century.

Type of Project	Construction (Construction – Planning – Technical Assistance)		
Target Population	Enterprise, Institutions, Businesses, Municipalities		
Towns Impacted	Regional		
Lead Organization	OpenCape Corporation		
Partner Organizations	Barnstable County, Woods Hole Oceanographic Institution, Cape Cod Community College, UMASS-Dartmouth		
Duration	OpenCape expects to immediately begin the process of finalizing permitting and rights of way, detailing existing network engineering studies, formalizing partnerships, and completing requests for proposal (RFPs) for construction of the network. Construction is intended to be phased and segmented to permit initial operating capabilities within nine months of funding and full operational capability and construction completion within two years. (start & end dates or on-going)		
Total Cost (If on-going insert annual cost)	$23M	Public Share:	Private Share:

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

On the Lower and Outer Cape, with unemployment in the double digits, broadband enables the launch of businesses and the ability for workers to telecommute around the globe. It enables part-time residents to spend additional time working from their homes in the region, and spending their dollars on regional goods and services.

In addition, it supports the growth of companies who can provide year round well paying jobs to the underemployed areas of Hyannis, Yarmouth, and Falmouth, adding both entry level and career ladder jobs to the local job pool.

How will this project improve competition within the region?

The region has seen limited investment in broadband infrastructure to date. This is largely due to a business model that suggests only densely populated areas have suitable levels of financial return to justify an investment in infrastructure from the private sector.

This model is driven by capital markets that reward short term returns and discourages longer term investments such as those required in infrastructure in a less-densely populated region such as southeastern Massachusetts, the Cape, and the Islands. The end result is that although residential cable and telephone DSL services are available, there are service gaps across the region and significantly higher costs for business class services than one would find in metro-Boston. The middle mile infrastructure that provides robust symmetrical bandwidth in support of business applications and a competitive access market with products geared toward different types of end users is largely missing. By removing this barrier to entry, competitive products and services can now be deployed in the region. In addition, by providing key connectivity tools, Cape-based companies can more easily compete in the global marketplace.

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

In this century it is difficult, if not impossible, to compete globally without access to broadband services. OpenCape will effectively provide the infrastructure needed for businesses based here to sell goods and services globally and for companies to place offices and employees in the region as part of their world mark.

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

Ample and affordable broadband is a key element in small business and the innovation economy. It supports new efforts, attracts talent, and is often a prerequisite for investment dollars. This project provides the essential infrastructure that enables innovation and entrepreneurship. In addition, this project will enhance the research dollars invested in our world-class research organizations in Woods Hole and will support the spin off of entrepreneurial ventures from these groups.

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

The infrastructure developed and deployed as part of the OpenCape project enables a full range of professional services to be exported from the region – the region is home or part-time home to world class scientists, business executives, and business contractors whose services are in demand around the world. In addition small startups to existing businesses can market and sell Cape produced products anyplace there is a potential demand for them.

How will this project increase the availability of clean energy?

This project will have a neutral effect on the availability of clean energy.

How will this project decrease demand for fossil fuels?

By enabling the creation of true broadband products, OpenCape supports true telecommuting, decreasing the number of miles driven on regional roads. It also enables the delivery of remote services, such as distance learning and telemedicine, which reduces the number of miles driven to obtain these services.

Priority Number	ID - 003

Priority Project Summary

Project Title	**Renewable Energy Generation Program**
Goal of the Project	To position the Cape Cod region as a leader in renewable energy science, technology, and generation initially by supporting two specific projects: A) the development of a pilot scale bio-fuel refinery using low light, cold climate, saltwater algae as the feed stock, and B) the development of offshore wind, tidal, and wave energy resources in ways that maximize benefits and minimize adverse impacts in local communities
Description	Project A: Algae Bio-fuels Refinery Pilot Project Project Background The Cape Cod Renewable Fuels Partnership was formed to explore and promote opportunities for renewable fuels on Cape Cod. The Partnership began as an advocacy group and sponsored several forums on fuels and worked to get bio-diesel available to the towns and to provide education. The focus of the group evolved to economic development and a small subcommittee of the Partnership has been working to develop a pilot scale bio-refinery concept that utilizes the competitive advantages that Cape Cod has to offer. Bio-fuels can be produced from a variety of plant matter. Currently the prevalent feed-stocks are soy beans for bio-diesel and corn for ethanol. The industry has been researching alternative production methods, and feed-stocks and the traditional production processes are beginning to change. One promising feedstock is algae. Cape Cod is well suited for the production of algae and has some of the world's leading institutions in the fields of aquaculture and algae; Woods Hole Oceanographic Institute (WHOI) and the Marine Biologic Laboratory (MBL). The Proposed Pilot Project The algae fuels pilot project will likely be located on the Mirant power plant site in Sandwich; this agreement is not yet finalized. This location will provide access to the stack CO2 emissions to help grow the algae. Warm water produced by the plant, which currently poses environmental problems when disposed of, will also be used in the production process. In addition to the Mirant CO2 and waste heat, effluent from the Massachusetts Military Reservation (MMR) is expected to be used to feed the algae. The pilot project is expected to produce 1 million gallons of bio-fuels annually. The refinery would require approximately five acres of algae ponds and the construction of a CO2, stack extraction (slipstream) system, a feed water treatment facility to reduce contaminants, some bioreactors (large plastic tubes to further inject CO2 and make them think it is winter) to optimize the oil content in the algae, a lipid extraction process (several processes are being discussed), and a process to separate the bio-diesel from the lipids (standard trans-estrification processes used in most bio-diesel production). Throughout the process, and as the biologic processes and algae feed stocks are optimized,

	technical assistance will be provided to a large degree by MBL and WHOI. Discussions are underway with a local distributor who will deliver whatever fuel is produced by the pilot project to locations on the Cape. Post Pilot Project The goal of this project is to provide a "proof of concept" for processes and, if successful, to develop a commercial scale plant. This plant has been discussed with the MMR and has been determined to be consistent with their mission. The base officials have informally recommended an area that could accommodate the estimated 100-300 acres required for the algae farm. It has been determined that, at the current limited operation of the Mirant power plant, enough CO2 would be generated to support the 50-100 million gallon per year bio-diesel production needs. The plant also anticipates that there is enough waste water and septic waste available to support the algae required for this level of production. In terms of economic development, the pro forma for the commercial scale plant estimates average annual gross revenues of $250 million over 12 years and the creation of 98 full-time jobs. --- Project B: Community-Based Offshore Renewable Energy for the Carbon-Constrained Future Project Background The energy and climate objectives established by the Commonwealth of Massachusetts and the United States cannot be achieved without large-scale development of offshore wind resources, but today's technologies, policies, and planning frameworks are not up to the task. This project will involve local stakeholders and communities in economic development activities related to deployment and testing of advanced wind, tidal, and wave energy technologies in the Cape & Islands region of Massachusetts. The project will implement key recommendations from the "Cape & Islands Energy Technology Strategy" funded by the Electric Power Research Institute, which is defining research, development, demonstration, and deployment (RDD&D) priorities consistent with ambitious stakeholder-defined goals relating to energy security, climate change, and sustainability for the year 2020. Project Planning The initial planning component will include meetings, charrettes, surveys, and informative communications designed to engage stakeholder groups and the public in defining community benefits associated with offshore renewables development. Topics will include the technical capabilities and job skills required for installing, operating, testing, and maintaining ocean energy technologies as well as the potential for additional economic opportunities in areas such as technology development, ecotourism, marine services, power purchasing, project ownership, R&D, and electrification. Later planning activities will be designed to build public acceptance for community-based ocean energy projects. Technical Assistance Elements of the Project The technical assistance component will support the design of workforce education and training programs focusing on offshore renewables, the launch of a Clean Energy Center of Excellence that will address multiple technologies, a detailed assessment of offshore wind resources and siting opportunities in state waters, and the creation of energy and climate policies and cooperative institutions designed to help localize the benefits of offshore renewables for residents, businesses, and communities. It also will support the pre-development of testing and demonstration projects in state waters and the planning of large-scale "over the horizon" projects in federal waters. Capital Construction Elements of the Project The construction component will initially provide meteorological and other equipment for

	resource assessment and for siting of community-scale testing and demonstration projects in state waters. During later stages, it will fund the deployment of cable, foundation, mooring, energy conversion, power electronics, environmental monitoring, and other technologies, as well as the installation of visitor exhibits and facilities highlighting offshore renewable energy development.
Overall Project Benefits	☆ Position the region as a center of the emerging renewable energy industry ☆ Less need to import fossil fuels, thereby leaving more money in the local economy for other uses ☆ Both reduction in Co2 pollutants from the Mirant power plant and less use of home heating oil ☆ Strengthen the emerging renewable energy generation industry on Cape Cod ☆ Creation of new and innovative technology locally ☆ New training and business opportunities locally ☆ Ability to draw money into the regional economy as well as retaining wealth locally through reduced dependence on imported energy ☆ Capitalize on offshore renewable energy development to develop a new industry cluster for the region that builds on existing strengths ☆ Significant potential for public-private investment, job creation, entrepreneurial activity, and knowledge and technology export ☆ Planning and implementation of community-based offshore projects offering clear and quantifiable local benefit
Job Creation	Construction: Project A: 50 Project B: A handful of jobs would be created during the initial construction component. During build-out of offshore testing and demonstration projects, temporary jobs would total in the dozens.
	Permanent: Project A: 15 Project B: Hundreds of jobs could be created by the creation of a robust marine energy science and technology sector in the Cape & Islands region, encompassing testing, demonstration, and commercial projects, as well as the businesses and organizations serving operations and maintenance, marine, environmental monitoring, training, research, and entrepreneurial functions.
Measures of Success	Quantitative: ☆ Reduction in overall energy prices on Cape Cod ☆ Reduction in use of home heating oil on Cape Cod ☆ Patents generated ☆ Training programs offered ☆ Gallons of fuel generated per energy expended in generation process ☆ Amounts of effluent (wastewater, CO2, and waste heat) diverted ☆ Amount and share of Public-Private Investment ☆ Jobs created

	Qualitative: ✯ Greater community acceptance of distributed renewable energy generation ✯ Stronger belief that renewable energy is a realistic substitute for fossil fuels

Type of Project	Planning & Construction (Construction – Planning – Technical Assistance)		
Target Population	Region-wide; lower-income populations and small independent businesses will benefit the most from lower energy prices		
Towns Impacted	Project A: Sandwich Program as a whole including both projects outlined here: Region-wide		
Lead Organization	Project A: Cape Cod Renewable Fuels Partnership Project B: Water Energy & Ecology Information Services		
Partner Organizations	Project A: Barnstable County, Woods Hole Oceanographic Institute (WHOI) and the Marine Biologic Laboratory (MBL), Mirant Corporation, and the Massachusetts Military Reservation Project B: Cape & Islands Self-Reliance, Cape Cod Community College, Cape Cod Economic Development Council, Massachusetts Executive Office of Energy & Environmental Affairs, Cape Cod Commission, University of Massachusetts-Amherst Renewable Energy Research Laboratory, University of Massachusetts-Dartmouth Marine Renewable Energy Consortium, Woods Hole Oceanographic Institution, Marine Biological Laboratory, NStar, National Grid, Cape Wind Associates, Cape Light Compact, Cape Cod Chamber of Commerce		
Duration	2010 - 2011 (start & end dates or on-going)		
Total Cost – Project A (If on-going insert annual cost)	$15 Million	Public Share: TBD	Private Share: Yes, amount TBD
Total Cost – Project B	Increasing from $250K to > $1M annually	Public Share: 80% (this estimate assumes support for the planning, pre-development, and development of testing and demonstration projects)	Private Share: 20% (this estimate assumes much greater private sector involvement in commercial projects running in parallel to the community-scale projects addressed by this initiative)

Project A: Algae Bio-fuels Refinery Pilot Project

How will this project serve one or more economically distressed populations?
The project is not currently targeted to serve a specific population. In the long-term those with less income will be the first to benefit from reduced energy costs that could result from this project

How will this project improve competition within the region?
Indirect through reduced cost of doing business

How will this project improve the region's competitive position in the global economy?
Reduced energy costs that have typically been much higher than the state or national average prices

How will this project support innovation and entrepreneurship in the region?
Current bio-fuels research has been focused on warm water, high light, fresh water strains of algae. The unique aspect of this project is that it will focus on low light, cold climate, saltwater species of algae to tailor it for New England.

What products or services will be exported out of the region as a result of this project?
This project will draw new money into the regional economy both by providing a substitute for imported fossil fuels and through the export of technology, expertise, and if developed to a commercial scale, bio-fuels.

How will this project increase the availability of clean energy?
The focus of this pilot project is to develop a bio-fuels production process using locally available cold water algae to provide a clean energy alternative to fossil fuels, primarily to heating oil.

How will this project decrease demand for fossil fuels?
New England is highly dependant on petroleum products, primarily for heating. This project would provide an alternative to home heating oil that would be generated locally, rather than being imported from overseas.

Project B: Community-Based Offshore Renewable Energy

How will this project serve one or more economically distressed populations?
By helping stabilize energy costs and increase reliance on renewables, this project will assist residents with low or fixed incomes in avoiding energy poverty. This project also will engage the Mashpee Wampanoag and commercial fishing interests in helping to define areas suitable for offshore renewable energy development, addressing their needs and concerns and opening them up to potential opportunities.

How will this project improve competition within the region?
This project will improve competition within the region by helping expand opportunity within the existing marine science and tourism sectors, encouraging further differentiation into new areas. In addition, by helping stabilize electricity prices in a region with some of the highest energy costs in the nation. The project will reduce the cost of doing business in local communities.

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

This project will improve the region's competitive position in three key ways. First, it will establish the region as an innovation center in offshore renewables, a globally significant industry. Second, it will help the Cape assert a green image, increasing its attractiveness to visitors, businesses, and homeowners. Third, it will support de-carbonization of the economy, stabilizing energy costs and reducing vulnerability to global carbon markets.

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

This project will stimulate innovation and entrepreneurial activity by defining new opportunities in the marine services and tourism sectors, and by creating an environment conducive to the field-testing and early installation of advanced technologies with widespread deployment potential. This will attract technology developers and venture capital to the region.

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

This project will support the export of knowledge and expertise relating to offshore renewable energy development, with experience gained here being applicable to the provision of consulting services elsewhere. It also will support the RDD&D of advanced energy, environmental monitoring, and marine operations technologies, some of which could be manufactured locally for export to global markets.

How will this project increase the availability of clean energy?

Building community acceptance for offshore renewables will accelerate technology deployment, providing access to world-class wind energy resources off the Cape & Islands.

How will this project decrease demand for fossil fuels?

Successful deployment of ocean energy technologies for power generation will directly reduce reliance on fossil fuels in the electricity sector and, at large scale will enable de-carbonization of the transportation sector.

Priority Number	SD - 002

Priority Project Summary

Project Title	**Renewable Energy Technology Testing and Training Center**
Goal of the Project	To establish Cape Cod as a national center for renewable energy testing and training thereby capitalizing on the wind, water, and other natural assets of the region.
Description	This project will begin by researching the feasibility of establishing a small to mid-scale wind testing facility on the Cape; other renewable energy technology testing and training opportunities will also be investigated. 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 National Park Service's Highland Center in Truro, MA. The site has an outstanding, measured wind resource that is one of the best in the state. Office/lab space could be placed on site, at the Massachusetts Military Reservation, or elsewhere in the region. The project 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. Companies that are looking to beta test their machines would apply to have testing conducted at the testing site.
Overall Project Benefits	This project would provide a much needed testing facility as well as many educational and professional opportunities. Having a facility like this would put our region at an advantage to attracting jobs to the outer Cape.
Job Creation	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.

Measures of Success	Quantitative: Overall: ☆ Number of feasibility assessments completed ☆ Number of actual testing sites established and the associated jobs created Project A: ☆ Number of turbines tested & certified ☆ Number of individuals trained
	Qualitative: ☆ Increased notoriety of the Cape as a center of the emerging renewable energy industry

Type of Project	Planning → Construction → Technical Assistance (Construction – Planning – Technical Assistance)		
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.		
Towns Impacted	The Town of Truro is proposed to be the host of the testing facility at the Highlands Center. Not sure about the other towns at this point and their direct association.		
Lead Organization	TBD (Self-Reliance has expressed interested in being a leader on this project).		
Partner Organizations	The National Park Service – Cape Cod National Seashore, UMASS Wind Energy Center; Members of CIREC, National Renewable Energy Lab, other universities and institutes		
Duration	On-going (start & end dates or on-going)		
Total Cost (If on-going insert annual cost)	$200,000 to get started	Public Share: TBD	Private Share: Testing fees from manufactures Some other sort of private support to support R&D and other technical capacities

How will this project serve one or more economically distressed populations?
Potential to stimulate depressed contracting industry?

How will this project improve competition within the region?

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

Operations and maintenance services, technical, and other services could be exported.

How will this project increase the availability of clean energy?

By helping to get more turbines tested and onto the market. It will also be a center where education that is much needed to move us in the direction of having a solidly educated workforce in the wind portion of the clean energy sector can take place.

How will this project decrease demand for fossil fuels?

By adding more wind energy into the grid, the outer Cape will have less dependence on fossil fuels for electricity.

Priority Number	ID - 001

Priority Project Summary

Project Title	**Wastewater Infrastructure in Economic Centers and Villages**
Goal of the Project	Restore the water quality of near shore coastal waters by reducing the impact of septic systems by providing wastewater infrastructure.
Description	Statement of the Problem: ☆ Our fresh and marine systems on which our communities depend are currently threatened by both point and non-point pollution sources. ☆ Nitrogen-rich runoff enters these waterways and drastically alters the chemical, biological and ecological processes. ☆ Such pollution has negative effects on our drinking water, our freshwater and marine ecosystems, our commercial fishing operations, and our recreational/ tourist opportunities. Wastewater Management Solutions: Under the Clean Water Act towns are required to comply with Total Maximum Daily loads for impaired coastal waters. Towns are required to develop and implement a Comprehensive Wastewater Management Plans (CWMP) to provide wastewater infrastructure. The provision of wastewater infrastructure has additional benefits of community planning to focusing growth in appropriate areas. The towns on Cape Cod are at different stages of this process. The CEDS places a priority on implementation projects that focus providing infrastructure to Economic Centers and Villages identified in the RPP Land Use Vision Map, such as: *(this is not an all inclusive list)* ☆ Hyannis Growth Incentive Zone - Water Supply & Wastewater Infrastructure Improvements: Investments by public and private entities have improved aspects of the infrastructure and environs, however, several major improvements to support continued economic viability are still high priority needs. These needs include replacement of aged piping, improved pumping capacity for improved pressure in vertical construction, and sewer improvements and extensions. ☆ Provincetown Wastewater Collection System - Phase 3 Expansion: Phase 3 of Provincetown's wastewater system is currently underway with a Design/Build/Operate service agreement signed between the Town and Metcalf & Eddy. Construction on this project can begin immediately. The project will construct approximately 4,000 linear feet of 8-inc PVC gravity sewers and two wastewater pumping stations. Approximately 10,500 linear feet of 4-inch and 6-inch PVC sewer source mains will be required to pump the collected wastewater to the existing wastewater treatment plant. Additional sewer connections to the existing Phase 1 vacuum system are also included. The addition of a new flow equalization tank at the treatment plant will be required as well. ☆ Buzzards Bay Wastewater: Develop a wastewater treatment facility and discharge system to serve Buzzards Bay that is currently in the planning and permitting phase. The treatment and discharge system is necessary for the redevelopment and growth of the Buzzards Bay village center and for compliance with the US Clean Water Act. Wastewater plant construction and distribution system valued at 18.5 M for Buzzards Bay area. Additional elements of this project under consideration include:

	✯ On-going Technical Assistance to Towns in completing and implementing their CWMP ✯ Regional Wastewater Plan ✯ Wastewater Technology Testing Facility – feasibility, design, & construction ✯ Nitrogen Trading Program – feasibility and development
Overall Project Benefits	✯ Shell fishing Industry – opening of shell-fish beds that have suffered from contamination due to septic and storm water run off. ✯ Tourism Industry – protects the perception that the Cape as having a pristine environment ✯ Affordable Housing – if developed to support density, sewers can allow for smaller units at lower development costs than currently possible under title 5 restrictions ✯ Development Density in Economic Centers (Smart Growth) – ✯ Investing in necessary infrastructure improvements and environmental protection projects will have measurable benefits for public health, the health of our anadromous fish (e.g. river herring), and other wildlife. ✯ In addition to creating immediate employment opportunities through these projects, these initiatives will bolster revenue generated through commercial and recreational fishing, aquaculture, tourism, and all other related industries.
Job Creation	Construction: TBD – will vary by sub-project
	Permanent: TBD
Measures of Success	Quantitative ✯ Watershed Nitrogen Levels ✯ Properties Served ✯ Development within Economic Centers served with Sewer
	Qualitative ✯ Greater vibrancy in downtown centers

Type of Project	Capital Investments: Systems serving Economic Centers, Industrial Trade Areas, & Villages (as defined by the RPP Land Use Vision Map) Planning: Regional Wastewater Management Plan; Comprehensive Regional Infrastructure Plan Technical Assistance: Feasibility analysis and possible development of a Nutrient Trading program; Assistance to towns on their Comprehensive Wastewater Management Plans (CWMP) (Construction – Planning – Technical Assistance)
Target Population	Lower income residents and small businesses located in downtown centers
Towns Impacted	Those focusing on providing infrastructure in economic centers and villages and shifting growth potential from outlying areas to those centers
Lead Organization	Towns
Partner Organizations	Barnstable County: Regional Wastewater Collaborative; Cape Cod Commission Private engineering and construction firms

Duration	Hyannis: 2009 -2011; Provincetown: 2009 – 2010; Orleans: 2009; Other: on-going (start & end dates or on-going)		
Total Cost (If on-going insert annual cost)		Public Share: 100%	Private Share:

How will this project serve one or more economically distressed populations?
Yes, the population living in the downtown areas targeted by this project have, on average, incomes below the median income for the region and are more likely to be unemployed than populations living outside these areas.

How will this project improve competition within the region?
Yes, in the long term this project will allow greater density in downtown centers, which in turn should reduce long-term costs of doing business and barriers to entry for small businesses

How will this project improve the region's competitive position in the global economy?
Not directly

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 directly

How will this project increase the availability of clean energy?
TBD – this will depend on the design of the wastewater systems and the ability to utilize any bi-products to generate energy.

How will this project decrease demand for fossil fuels?

Priority Number	BC - 003

Priority Project Summary

Project Title	**Coastal Use Templates for Economic Development**
Goal of the Project	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.
Description	Phase 1: Baseline Land Use & Regulatory Analysis: The first phase of this project will be to develop a baseline analysis of the current uses along the coastline, how that compares to historic uses, and where use conflicts appear to exist. It will include: ☆ Coastal Mapping: map historic and existing coastal uses ☆ Current Use Analysis: identify use conflicts, current demand by different uses, existing connections between coastal and land-based economies (transportation links, flow and processing of goods, tourism infrastructure, etc.) ☆ Economic Analysis: estimate the economic value of different uses – developed and natural. ☆ Infrastructure Needs Analysis: evaluate the quality of harbor infrastructure, need for additional infrastructure related to range of harbor uses, identify needs related to sea level rise and hazard mitigation ☆ Regulatory Analysis: complete tax and regulatory analysis (including fees) of what uses are permitted, what uses are not, what the regulatory costs are for different permitted uses relative to each other and to their impacts on the environment, infrastructure, and economy; articulate the levels of regulation required for different uses ☆ Fiscal Analysis: what public costs are associated with continuing current uses or pursuing alternative options ☆ Future Use Analysis: Identify coastal areas where development and redevelopment is desired and assess infrastructure needs to serve these areas; identify areas for un-development; identify opportunities to make physical connections between in-land and coastal economic areas; identify areas where natural or appropriate man-made structures can mitigate the expected impact of sea-level rise and natural disasters Phase 2: Land Use Template Design: The second phase of the study will be to craft a model for developing a healthy year-round coastal economy on Cape Cod. It will include: ☆ Existing Models: research land use models used in other regions and how effective these models are at realizing the economic potential of the coast ☆ Model Goal(s): establish coastal land use and economic goals through an inclusive, comprehensive planning process ☆ Develop Location Based Land Use Templates: design a series of land use templates

	around prototypes of different environmental and built environments, historic uses, and potential uses. ☆ Identify Regional Redevelopment Tools: tools to purchase property or development rights ☆ Identify Desirable Capital Projects: develop connections between coastal and inland economies and infrastructure systems Phase 3: Implementation: The crucial third phase is implementation of the model developed. Implementation will involve educating the public, local elected officials and board members, working closely with the press and other information conduits to improve overall understanding of the issues identified and the methods proposed to address them.
Overall Project Benefits	☆ Lessen the adverse impacts to estuaries, salt marshes, and related natural infrastructure essential to the health of coastal waters as a source of both food and recreation ☆ Improve public access to the coast ☆ Stimulate redevelopment along the coast that are consistent with best practices for coastal, flood plain, and green construction ☆ Improve productivity of working waterfronts; safe and modern harbor infrastructure ☆ Supports essential industry sectors including: ☆ local fin and shell fishing and related low-impact resource dependent uses ☆ marine science and technology ☆ tourism and recreation ☆ Lessen the economic losses associated with sea-level rise and natural disasters
Job Creation	Construction: TBD; would occur in Phase 3: Implementation
	Permanent: TBD; would primarily be indirect
Measures of Success	Quantitative: Immediate-term Process Measures: ☆ Completion of each project phase ☆ 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: ☆ 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

	Qualitative: Immediate-term Process Measures: ☆ Heightened consciousness of how land use and economic development are related ☆ Greater understanding of how we can better leverage the economic value of our coastal and ocean resources without impairing their natural value Long-term Impact Measures (if need for a redevelopment authority is found): ☆ Greater linkages between our in-land and coastal sub-economies resulting in more value added economic growth

Type of Project	Planning		
Target Population	Businesses located or dependent on the coast including independent fishermen		
Towns Impacted	Region-wide		
Lead Organization	Cape Cod Commission		
Partner Organizations	Cape Cod Economic Development Council and other departments of Barnstable County; Association to Preserve Cape Cod (APCC) and APCC Business Roundtable; 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.		
Duration	2009 - 2014		
Total Cost (If on-going insert annual cost)	TBD	Public Share: TBD	Private Share: TBD

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

Priority Number	BC - 001

Priority Project Summary

Project Title	**Development in Economic Centers Cost Analysis**
Goal of the Project	Phase 1: Identify sources of cost differences between development and redevelopment of those areas identified for growth, and those areas outside of designated growth centers. Phase 2: Identify and adopt incentives to insure that development will be less expensive in designated growth centers than development outside these areas
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 currently more expensive to comply with this policy and the Land Use Vision Map than not complying. The least expensive development or redevelopment on Cape Cod remains, as with much of the US, single-story structures along main arterials. A variety of existing economic and regulatory conditions reinforce this pattern. The up-front cost of building sufficient infrastructure in growth areas and the tendency to pass the cost on through betterments rather than through the general tax levy further exacerbate this cost differential. The Regional Policy Plan also calls for mix-use multi-story development and redevelopment; while in the long-term this is a more efficient form of development requiring less public investment per unit, the up-front costs borne by the developer are higher. Again, there are both economic and regulatory conditions that contribute to these up-front costs as well as perceptions of customer demand that make developers less willing to bear those additional costs. The pattern of developed envisioned in the Regional Policy Plan will not be realized if these cost imbalances are allowed to persist. This research and planning project seeks in Phase 1, to understand the specific sources of this imbalance, and in Phase 2 to identify public policy changes that can recalibrate development costs to favor the areas designated for growth. Phase 1: ☆ Design study to identify differences in development and operations costs ☆ Evaluate the impact of existing local zoning and permitting requirements ☆ Evaluate the impact of regional and state regulations ☆ Evaluate the impact of infrastructure financing methods and property tax limitations have on development and redevelopment costs Phase 2: ☆ Research possible regulatory changes and economic incentives that could be employed at the State, Regional and local levels to reduce the cost of development/redevelopment of multi-story, mixed use buildings in designated

	economic centers. ☆ At the same time, identify policy changes that will increase the cost of development outside of the designated growth centers that are consistent with the long-term impacts of sprawl development. → Examples might include exemption of infrastructure costs from levy limits, use of District Increment Financing, and focusing public investment solely to benefit those areas designated for growth. ☆ Design and conduct a public planning process to gather ideas and focus in on those ideas deemed most effective and achievable. Later phases of this project would focus on adopting the recommended changes and evaluating their impact.
Overall Project Benefits	Successfully channeling growth to town centers served by the necessary infrastructure to mitigate the environmental impacts of development have a number of economic benefits to both the private and public sectors: ☆ Viable public transit system ☆ More efficient use of land ☆ Less expensive infrastructure (particularly utilities and wastewater disposal/treatment) ☆ Reduced transportation costs per family due to less need for auto use ☆ Increased health (less expensive health care costs) due to increased opportunities for walking to work and for general exercise, increase social interaction, job growth etc.) ☆ Improved community character and more human interaction leading to a greater sense of community ☆ Variety / Affordable housing and commercial space
Job Creation	Construction: NA
	Permanent: NA
Measures of Success	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
	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

Type of Project	Planning (Construction – Planning – Technical Assistance)		
Target Population			
Towns Impacted	Regional		
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, Cape Cod Builders Association, Cape Cod & Islands Association of Realtors.		
Duration	2009 - 2014 (start & end dates or on-going)		
Total Cost (If on-going insert annual cost)	$300,000 estimate	Public Share: 75%	Private Share: 25%

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 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. It could also 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.

Priority Number	BC - 002

Priority Project Summary

Project Title	**Redevelopment Authority**
Goal of the Project	Project goal: Complete a feasibility analysis to identify the most appropriate tool to achieve the goals of encouraging redevelopment areas designated for development and redevelopment. 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.
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 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 fund to repay debt 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? • Will the entity be required to act in a manner that is consistent with the Regional Policy Plan? With local comprehensive plans? 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.
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
Job Creation	Construction: NA
	Permanent: NA

Measures of Success	Quantitative:` 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
	Qualitative: 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

Type of Project	Planning (Construction – Planning – Technical Assistance)		
Target Population			
Towns Impacted	Region-wide		
Lead Organization	Association to Preserve Cape Cod Business Roundtable		
Partner Organizations	Cape Cod Commission, Cape Cod Economic Development Council, municipalities, Cape Cod Chamber of Commerce, local chambers of commerce.		
Duration	2009 - 2014 (start & end dates or on-going)		
Total Cost (If on-going insert annual cost)	$300,000	Public Share: TBD	Private Share: TBD

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.

Priority Number	BD - 003

Priority Project Summary

Project Title	**Specialized Four-Year College – Feasibility Analysis**
Goal of the Project	To complete a feasibility analysis for the establishment of a specialized four-year degree granting institution focused on subject areas of significance to Cape Cod's economy, particularly its emerging industries.
Description	A new advanced educational facility focusing on subject areas having economic significance to Cape Cod would attract a new pool of young students and experienced faculty to the region and serve to promote Cape Cod as a place where advanced learning takes place. The new school would focus on undergraduate degree programs not currently available on Cape Cod, but directly related to the region's emerging industries of renewable energy, energy efficiency technology and practices, marine science and technology, and arts and culture. The school could be either an independent entity or affiliated with an existing institution on or off-Cape. Each of these subjects bears a relationship to the physical, social, and environmental aspects that distinguish Cape Cod competitively. In each instance, Cape Cod could serve as a laboratory for educational endeavor stimulating new approaches to solving problems and strengthening the social, environmental, cultural and intellectual fabric of Cape Cod. In addition to serving local students, the school would also draw a new crop of students to Cape Cod each and every year who upon graduation may decide to establish careers on Cape Cod, infusing it with their newly acquired skills, their ideas, and idealism. Cape Cod currently has one community college, one four-year college, and a number of research institutions offering graduate programs. The Cape Cod Community College (CCCC) confers primarily two-year associates degrees. However, a number of undergraduate and graduate degree programs are offered in partnership with off-Cape colleges/universities. The Massachusetts Maritime Academy (MMA) is a four-year school focusing primarily on selected undergraduate degrees in marine and facilities engineering and management. Both schools are highly successful in recruiting and educating students. The new school would not compete with either CCCC or MMA. Instead, it would offer an entirely new educational avenue for a different pool of students recruited from both on-Cape and off-Cape. It is anticipated, in fact, that the school would complement the established colleges through various types of creative educational partnerships. In addition, it is anticipated that the school would create linkages with the Cape's business and non-profit communities for the sake of research, internships, and other types of experiential learning.
Overall Project Benefits	☆ New source of intellectual capital in identified subject area ☆ Pool of talent to help address selected problems/issues ☆ Potential partner for Cape-based project/programs ☆ Pool of recruits for local workforce

	✯ Magnet for attracting new funding sources Major purchaser of local goods and services
Job Creation	Construction: To be determined
	Permanent: To be determined
Measures of Success	Quantitative: ✯ Number of enrolled students ✯ Dollars spent in local economy (expenditures) ✯ Number of collaborative projects with local community ✯ Dollars leveraged that assist the regional or local economy, e.g. total dollar value of grant-funded projects that provide regional or local benefit ✯ Number of Cape-based internships ✯ Number of students who find employment on Cape Cod either on P/T or F/T basis during either the school year, summer, or after graduation
	Qualitative: ✯ Overall effect on local and regional economy

Type of Project	Planning		
Target Population	Local residents; local businesses		
Towns Impacted	TBD		
Lead Organization	TBD		
Partner Organizations	TBD		
Duration	TBD		
Total Cost (If on-going insert annual cost)	TBD	Public Share:	Private Share:

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

How will this project improve competition within the region?

By creating a new source of intellectual capital within a specific subject area with linkages to the business, academic and non-profit communities.

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

By functioning as an intellectual resource for the identified subject area, expanding knowledge in the subject, linking with both on-Cape and off-Cape collaborators, creating a local pool of talent capable of understanding and contributing to a subject area having global importance, e.g. environmental sciences, biological sciences, etc.

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

Through research and partnerships with existing businesses and by serving as a resource for entrepreneurs.

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

Education, research, consulting services…and others to be determined.

How will this project increase the availability of clean energy?

Yes, should the school offer clean energy curriculum and/or is constructed as a high-performance green building.

How will this project decrease demand for fossil fuels?

Effort would be made to ensure that the school is designed as a high-performance building.

Priority Number	BD - 002

Priority Project Summary

Project Title	**ADA & Building Compliance Loan Program**
Goal of the Project	To create a low-interest loan fund for commercial property owners to assist them in renovations to comply with existing building code and with Americans with Disabilities Act (ADA) regulations in order to improve the overall quality of commercial building stock and increase the number of ADA compliant buildings.
Description	The ADA and Building Compliance Loan Program (ABC-LP) would provide low-interest loans to building owners planning to renovate more than 25% of their existing building. Technical assistance would be offered to building owners, architects, designers, builders, and building inspectors to help them understand ADA and building code compliance issues and how they impact new construction, renovation, or expansion of real property. Building owners are often reluctant to renovate or expand their property because of the high costs of ADA and building code compliance once certain thresholds are triggered. As a result, there are buildings across the Cape in relative disrepair and there is a limited amount of high quality commercial space, most of which is not located in downtown centers. In many instances, ADA code compliance acts as a barrier to the mixed-use multi-story building improvements vital to realizing the smart-growth vision laid out in the Regional Policy Plan. Compliance with ADA will become increasingly important as the largest population cohort ages, and given the appeal of Cape Cod to retirees. Failure to upgrade buildings in compliance with state and local code is also a hazard to tenants, their customers, and any residents that may live in these buildings. The net effect is that Cape Cod is not competitive with other commercial areas and the revitalization of downtown areas remains economically prohibitive, especially in comparison to green-field development. The first phase of this project would be to identify the appropriate financing and management structure for the ABC-LP. The demand for ancillary services, such as training and inspection programs, would also be considered during this first phase. Once the structure is finalized, the next phase would be to capitalize the fund – possibly with an EDA grant that would be matched with funds from local area banks, and other public sources. The BLCP is likely to be structured as a revolving loan fund whereby principle is renewed through periodic loan payments. Interest payments would assist in sustaining administrative costs for the program.
Overall Project Benefits	☆ Increased accessibility to commercial buildings for the disabled community. ☆ Increase in the efficient use of land by encouraging multi-story buildings and renovation of buildings in downtown areas. ☆ Increase in the quality of commercial space on Cape Cod. ☆ Increase in the total amount of commercial space available on Cape Cod through ADA compliant construction, renovation and expansion.
Job Creation	Construction: NA

	Permanent: NA
Measures of Success	Quantitative: ☆ Number of revolving loans ☆ Total amount of money loaned ☆ Number of funding sources, e.g. banks, participating in loan fund ☆ Number of ADA compliant projects permitted ☆ Number of people using BLCP technical assistance services ☆ Number of people attending BLCP-sponsored seminars/events
	Qualitative: ☆ Recorded evidence within the design/build community that the program is beneficial ☆ Awareness levels of the BLCP among business owners and property owners

Type of Project	Technical Assistance		
Target Population	Business owners and owners of commercial property		
Towns Impacted	All 15 towns on Cape Cod		
Lead Organization	To be determined		
Partner Organizations	Municipalities, regional and local chambers of commerce, state building code compliance, architects, builders, real estate professionals and commercial property owners.		
Duration	To be determined		
Total Cost	Capitalization of at least $1.5 million	Public Share: To be determined	Private Share: To be determined

How will this project serve one or more economically distressed populations?
This project would benefit people with disabilities living on or visiting Cape Cod.

How will this project improve competition within the region?
This project would improve the quality of commercial, particularly office, space on Cape Cod which would help to attract and retain professional, technology, and other business activities desired to better balance the regional economy and improve the likelihood that residents will work locally rather than commute off-Cape.

How will this project improve the region's competitive position in the global economy?
This project will maintain the Cape's position as a leading tourist destination by recognizing the needs of people with disabilities often related to aging and by improving commercial space and the ability to attract businesses trading in the global market.

How will this project support innovation and entrepreneurship in the region?
This project may indirectly support innovation through the greater likelihood that property owners will tailor their space to tenants' needs and support entrepreneurship by allowing small business owners expand where it was previously cost prohibitive and should result in more leasable commercial space overall for use by entrepreneurs.

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

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

How will this project decrease demand for fossil fuels?
This project may help attract more businesses and open up more opportunities for residents to find work locally that they must now commute off-Cape to reach.

Priority Number	BD - 001

Priority Project Summary

Project Title	**Buy Local Infrastructure Development Program**
Goal of the Project	Retain and attract wealth to the regional economy through targeted investments in projects that will facilitate local business to local business transactions, projects that will result in local provision of products currently imported or unavailable locally, and in local value-added projects.
Description	This program goes beyond the buy local programs that focus on locally grown or gathered food and products made from them; this program focuses on making capital investments that will facilitate the exchange of local goods, value added activities, and the development of goods and services locally that are currently unavailable or imported. The first phase of this program will be a baseline analysis of local supply and demand, existing buy local programs, and regulatory or other practical impediments to development of the local-to-local market. The second phase will be to identify specific industries or mechanisms that would benefit from public investment. Capital investments could be in building facilities and/or building virtual market mechanisms, such as a virtual local products exchange or buyers and seller cooperatives. Phase 3 would be implementation through actual public investments and program support. In addition to the investment projects, the program would support existing programs that do focus on local foods, such as Buy Fresh Buy Local Cape Cod and Slow Food Cape Cod that are affiliated with national buy local initiatives. **National Programs with Existing Local Affiliates** ☆ FoodRoutes – 2 programs: Buy Fresh Buy Local Cape Cod & Buy Fresh Buy Local Massachusetts ☆ Slow Food USA – 7 Networks in MA including Slow Food Cape Cod ☆ Business Alliance for Local Living Economies (BALLE) – 6 Networks in Massachusetts; none on Cape Cod **Buy Fresh Buy Local Cape Cod - An Existing Program of Barnstable County** The Cape Cod Cooperative Extension Horticulture, Agriculture, & Natural Resources Program recently established a marketing program to encourage consumers to buy locally. The program, Buy Fresh Buy Local Cape Cod, aims to connect consumers and businesses to the freshest, most delicious locally grown and produced foods available, while also supporting local growers and the agriculture and aquaculture communities on Cape Cod. The program uses a membership structure to build a network of local producers and consumers. Any Cape business that grows, serves, processes or sells Barnstable County-grown products can become a member. Membership groups targeted include farmers, shell and fin fishermen, restaurants, groceries, caterers, and accommodations. Members receive marketing materials, a membership guide and monthly e-news letter, inclusion in a bi-weekly business-to-business publication, and direct technical assistance from program staff.

	Buy Fresh Buy Local Cape Cod is a program of the Cape Cod Cooperative Extension with direction from the Southeastern Massachusetts Agricultural Partnership (SEMAP/ www.semaponline.org). It is a program of FoodRoutes Network, a national nonprofit organization that provides technical support to community-based groups that are working to strengthen regional markets for locally grown foods. Funding is provided by a grant from the Massachusetts Department of Agricultural Resources and the Cape Cod Cooperative Extension. **Slow Food Cape Cod** Slow Food Cape Cod (SFCC) is a local convivium (chapter) of Slow Food USA, a 501(c)3 non governmental, non profit organization dedicated to promoting the pleasures of the table. The mission is "to bring joy into our everyday meal, to know where our food came from – eat local and experience the superior taste of dishes prepared with fresh, in season, ingredients, while preserving our regional heritage." The chapter is focused on learning through experience is going to explore these concepts with field trips to farms and markets, tastings, pot- luck suppers, book discussions, and cooking classes; all celebrating the sustainable farms, fishermen, artisans, cheese makers, foragers, bakers, beekeepers, and regional specialties that define our area. Along the way we are all going to get to know each other and have a good time coming together as a community. The convivium on Cape Cod was started in 2008, we are focused on getting the word out and growing our membership.
Overall Project Benefits	The Overall Program ☆ Regional marketing and branding. ☆ May identify opportunities for cape businesses to fill gaps or substitute for imports. ☆ Increase public awareness of the economic value of buying from local purveyors and service providers. The Local Food Elements ☆ Strengthen and leverage the food growing resources and income of the 225 family farms on the Cape. ☆ Encourage owners of small parcels of agricultural land to begin producing niche market agricultural products or to lease their land to 3rd party growers. ☆ Help to protect further development of valuable agricultural land on Cape Cod and make policies/laws that formalize that protection more politically palatable.
Job Creation	Construction:
	Permanent: TBD
Measures of Success	Quantitative: ☆ Job growth particularly in professional services and agriculture/fisheries. ☆ Number of national chains located on Cape.
	Qualitative: ☆ The Cape brand as an international tourism destination becomes more linked to the unique nature of local products. ☆ Increased sense of community.

Type of Project	Planning and Capital Investment

Target Population	Small business owners on Cape Cod and their targeted customer base.		
Towns Impacted	All fifteen towns on Cape Cod stand to experience positive impacts.		
Lead Organization	To be determined.		
Partner Organizations	Barnstable County (including the Buy Fresh Buy Local Cape Cod program); a steering committee of businesses, buy local activists, and policy makers; Regional and local chambers of commerce; municipalities; Hook Fishermen's Association; Barnstable County Farm Bureau; others TBD.		
Duration	September 1, 2009 – on-going		
Total Cost (If on-going insert annual cost)	TBD	Public Share:	Private Share:

How will this project serve one or more economically distressed populations?
The BLN will provide increased income for low-income goods and service providers, including local growers, artists and artisans, shell and fin fishermen, and local specialty food producers using local ingredients.

How will this project improve competition within the region?
Over time the program will lead to greater financial stability for the Cape's small businesses. By no longer competing on price alone, local businesses will be able to increase their customer base despite the availability of lower prices for similar goods off-Cape.

How will this project improve the region's competitive position in the global economy?
Cape Cod existing brand will be leverage to increase the export of local products off-Cape.

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

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

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

How will this project decrease demand for fossil fuels?
Yes, by expanding the availability and access to local products this program will reduce the need for imports and the use of fossil fuels in the transportation of goods to Cape Cod.

Priority Number	SD - 002

Priority Project Summary

Project Title	**Capitalize the Cape Cod Fisheries Trust**
Goal of the Project	To ensure a lasting future for a local sustainable fishing industry on Cape Cod in the face of rising permit prices and the rise of corporate consolidation by establishing a local trust fund to purchase fishing permits for lease to local independent fishermen at an affordable price.
Description	Cape Cod, like other traditional fishing communities in the Northeast, is in danger of losing its historic fishing fleets. Fewer fish and more fishing regulations have taken their toll on an industry that was already feeling the encroachment of modern development pressures like tourism and coastal development. Making a livelihood as an independent fisherman is increasingly difficult as the cost of maintaining fishing permits along with the rising cost of living on Cape Cod. Fishermen are retiring or selling their fishing permits as large corporate competitors dominate the market. While some ports on Cape Cod, such as Provincetown, have all but ceased to exist, the ports of Chatham and Harwich continue to hold on through the tenacity of local fishermen, the Cape Cod Commercial Hook Fishermen's Association (CCCHFA), and town leaders that have protected working waterfronts such as the Chatham fish pier. The Cape Cod Fisheries Trust (CCFT) was established to buy fishing quota traded on the open market and then lease that quota to the local fishing community. The Trust's initial focus is on ground-fish, scallop, and lobster fisheries. Without the intervention of the Cape Cod Fisheries Trust, permits coming up for sale from retiring individuals on Cape Cod and elsewhere in New England will be bought by larger companies and permanently lost to Cape Cod. To date, the Trust has invested over $1.6 million in the purchase of ground-fish (cod, haddock, and white hake) permits and scallop permits. The Cape Cod Fisheries Trust will work in collaboration with a number of existing organizations, including the Cape Cod Commercial Hook Fishermen's Association (CCCHFA) and the Community Development Partnership (CDP). The Cape Cod Fisheries Trust will be owned by CCCHFA, and the CDP will act as the independent fiscal agent, administering the lending and leasing programs for the Trust. The CDP's mission is to promote a vibrant and diverse community on the Lower Cape by addressing housing needs and encouraging small business development and job growth. The CDP has experience running a micro-loan program and currently has over 100 business loans on the books, totaling over $1.8 million. It has policies in place, including a grievance procedure, and will have staff capabilities to handle the projected CCFT workload. Like working forest trusts or agricultural land trusts, the capital will be invested in an asset. For the Cape Cod Fisheries Trust, those assets are the fishing permits or fishing quota and access to the fish stocks which we are working to rebuild. CCCHFA will hold the asset and allow fishermen to use the permits for a fee. Fees generated will cover program costs and generate additional capital for future permit acquisitions, conservation initiatives and responsible employment.

	CCCHFA's goal is to raise $10 million by 2011: $4 million in 2009, $2 million in 2010 and $4 million in 2011. CCCHFA expects $5 million in philanthropic donations and grants, $4 million in philanthropic loans, and $1 million in market rate loans. The $10 million will be invested over 4 years to purchase $4 million in scallop permits and $6 million in ground-fish permits. As CCCHFA successfully acquires fishing permits, the quota will be leased to Cape Cod commercial fishermen who meet program eligibility criteria and agree to satisfy the environmental and financial covenants. It is critical that the Cape Cod Fisheries Trust move forward expeditiously since market forces will otherwise deprive fishermen and communities of the quota on which their future depend.
Overall Project Benefits	✯ Will preserve "at risk" fishing jobs and support fishing infrastructure jobs on Cape Cod. ✯ Will stabilize a seafood industry with the capacity for $30 million annual revenues. ✯ Will allow fishing to continue as a true livelihood and as a tourism draw. ✯ Will support fishing families and retain demographic diversity on the Cape. ✯ Will lead to greater use of sustainable fishing practices. ✯ Will support one of the Cape's export industries.
Job Creation	Construction: NA
	Permanent: ✯ Will protect 70 full-time fishing vessels on Cape Cod. ✯ Will protect and preserve 175 fishing jobs on Cape Cod. ✯ Will create up to 50 additional industry support jobs such as scientific data collection, fisheries management positions, and seafood marketing.
Measures of Success	Quantitative: ✯ Buy $10 million of fishing permits and quota within 5 years. ✯ Lease quota to 70 fishing vessels within 5 years. ✯ Maintain a total annual catch of groundfish, scallop, and lobster that is worth over $10 million per year.
	Qualitative: ✯ Ensure that traditional ports, fleets, fishing gears, and vessels are supported on Cape Cod. ✯ Maintain traditional revenue "sharing" principles with respect to Cape Cod fishing businesses. ✯ Ensure access to fresh fish for local fish markets and restaurants. ✯ Create a viable strategy for transitioning fish quota from retiring fishermen to future generations of fishermen on Cape Cod. ✯ Deliver a community ownership model for quota managed commercial fisheries that responds to the national trends in fisheries management.

Type of Project	Capital and Technical Assistance
Target Population	Independent Community-based Fishermen

Towns Impacted	Port Communities of Chatham, Harwich, Provincetown to begin with. (Could be region-wide including Islands since purchaser could live anywhere on Cape).		
Lead Organization	Cape Cod Fisheries Trust / Cape Cod Commercial Hook Fishermen's Assoc.		
Partner Organizations	Community Development Partnership, Environmental Defense Fund, Conservation Law Foundation, Barnstable County.		
Duration	Underway and on-going (launched in 2008).		
Total Cost (If on-going insert annual cost)	$10 M	Public Share: $4 M	Private Share: $2.5 M thus far

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

As commercial fish populations are restored by federal regulation, fishing jobs could be an emerging and vital source of employment on Cape Cod. Fishing jobs are distressed on Cape Cod due to the simultaneous pressures of increasing fish regulations, high costs of real estate, and other development pressure on space & fish infrastructure. Fishing dollars re-circulate locally on Cape Cod for a high value economic impact directly on Cape Cod.

The Cape Cod Fisheries Trust will serve:

- New and low income businesses.
- Create or retain low income employees (crew).
- Quota financing rejected by traditional Cape Cod lenders.
- Fall within a net income range or gross revenue range.
- Operational for less than 5 years.
- Sustainable fishing businesses - All businesses working with the Trust must fish sustainably and those fishing businesses that are more sustainable will receive higher allocations of quota.
- Businesses that may leverage catch from by-catch quotas. Existing businesses with successful balance sheets may lease CCFT quota for by-catch species that enable the business to leverage much larger catch of target species.
- Shore side businesses. Many low income shore side businesses will benefit substantially from all additional landings and processing of fish due to the work of the CCFT.

In order to qualify for the Trust program, fishermen must meet the following criteria:

- Demonstrate Cape Cod residency.
- Be a CCCHFA "member in good standing".
- Own and materially participate in the operation of a fishing vessel.
- Be willing to harvest ground-fish, scallop, and lobster with non-harmful and non-wasteful commercial fishing gears.
- Demonstrate that crew is compensated on a "share" or net revenue percentage and not solely by a "day wage"
- Demonstrate need for funding.
- Demonstrate the potential to create / retain jobs.
- Submit compliant financials.

Demographic information (including income information) will be collected and tracked as part of this process. Additionally, tracking and documentation of community statistics, such as employment, and utilization of social services, will provide a

broader indication of the progress that is being made through the effort. The Cape Cod Fisheries Trust will submit an annual report to the CCCHFA Board of Directors and investors containing:

- An audit of program financials including a summary of capital raised and other debt or equity partners as well as program income and expenses.
- Cash flow projections and analysis of current performance.
- A summary of fisheries benefits including fishing permits, licenses and quota held by CCCHFA; permit, quota or license valuations for each fishery that CCCHFA maintains holdings; and total asset valuation.
- A summary of community benefits including number of Cape Cod fishermen served; number of fishing vessels served; value of product landed; and value added opportunities.
- A summary of conservation benefits including an assessment of impact on over fishing, by-catch, and habitat protection.
- Fishermen's report conducted by outside consultant to gauge the operations of the new program.
- Revised risk assessment for each fishery with Trust holdings.

At the end of two years of operation, CCCHFA will seek to convene the major funding sources to review the initial results of the program. An outside consultant will provide a written evaluation and have a panel of fishermen and other stakeholders respond to questions which foundations and others might have. This interaction would allow for mid-course adjustments in the program, to see that objectives are being met, and to respond to any unintended consequences of the program. CCCHFA will submit surveys and narratives to the field on the benefits of the Cape Cod Fisheries Trust.

How will this project improve competition within the region?

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

Market Trends - Fisheries Transitioning to Quota Management
There are many factors negatively impacting the New England fisheries including declining fish populations, corporate takeover of local fishing industries, increasing variable costs, increasing cost of living and a changing regulatory environment. Implementation of quota management in United States fisheries is a slow and ad hoc process that has failed to standardize the market design process. Unintended social, environmental and economic costs have been the norm for fisheries transitioning to quota management and New England fisheries are no exception.

In the United States, fisheries management is governed under the Magnuson Act that sets forth a regionalized management infrastructure and national standards or mandates on how to design fishery management plans for individual fisheries. Recent revisions to the Magnuson Act and the new administration demonstrate a strong commitment to a rapid paced transition to quota management and catch shares.

Fishery management in New England is poised to transition to a new regulatory regime of enforceable quota or catch shares. The new catch share programs set scientific-based, species-by-species total allowable catch (TAC) limits and then allocate a percentage share of that total to individuals, cooperatives, or communities. Thus, changes to fishery management programs at the federal level and at the regional level have created an emerging market for the purchase of federal licenses, permits and quota in various fisheries.

Transition to quota management or catch shares vests those fishermen that have been involved in the fishery during recent "qualifying years" with permanent "rights" to catch the fish. This allocation of fishing rights provides existing or "grandfathered" fishermen and companies with permits or quota shares that represent zero-cost access and ownership of what was once a community held asset and resource. In addition, the permits or catch shares can be traded and sold for cash; as demand increases, prices escalate rapidly. The resulting economics are similar to those of taxicab medallions in New York City: short on supply, high in price.

Historically, as fisheries around the world have moved to quota or catch share management, the value of the fishery has increased. There a number of reasons, including:

- Increased quota value as a result of clearer property rights to the fish.

- Increased ex-vessel prices due to improved fish quality and better timing to market.
- Improved economic efficiency due to fewer timing and vessel constraints on the fisherman from historical government regulation.

Analysis of quota and catch share fisheries around the world shows factors contributing to the value of quota share and permits, including:

- Health and stability of the fish population.
- Strength and stability of the fish price.
- Clear and definable property rights in place. Duration of catch share system.
- Access to quota financing, including the readiness of lenders to accept quota as collateral.
- Harvesting efficiency.

It is anticipated that as the quota market matures and stabilizes, quota leasing in New England will be dominated by larger business and corporate interests, similar to what has happened in British Columbia, Maritime Canada, Alaska, and the West Coast of the US. The price of a permit lease ranges from 20% of the value landed on the East coast, where there are very few examples, up to 50% of the value landed on the West Coast where quota leasing is more prevalent. The Alaskan and foreign markets have even higher lease rates than these regional US markets. Individual, small businessmen, such as those on Cape Cod, do not have the liquidity to compete on an open market with larger corporations, and the banking industry does not yet understand the market sufficiently to provide accessible loans or other investment vehicles.

By buying an ownership position in the scallop and groundfish quota or catch share markets, the Cape Cod Fisheries Trust will help transition a significant portion of privatized fishing rights, quota or catch shares from individual vested interests back to a community owned asset, while requiring stewardship of those assets. In the process, the Trust has a unique opportunity to promote small businesses with sustainable practices over large corporate interests.

Market Competition – Quota Demand and Competing Businesses
There is highly liquid demand for scallop and groundfish permits and quota from the private sector, primarily from large business interests based in Gloucester and New Bedford but with increasing capital support from financial centers in Boston, New York, and overseas. Without the intervention of the Trust, permits coming up for sale from retiring individuals on Cape Cod and elsewhere in New England will most likely be purchased "from away" and permanently lost to the detriment of Cape Cod fishermen and communities which consider fishing a way of life.

Competition for fisheries permits and quota is very strong elsewhere in the US and Canada. In a number of fisheries, the quota markets are developed to the point where there exist highly liquid assets, transparent pricing, and even government controlled transaction clearinghouses. Historically, prices have soared in response to better developed quota markets. By studying the domestic markets for quota, including those in the Pacific, North Pacific, and the Gulf of Mexico, and the international quota markets in Iceland, Canada and New Zealand, CCCHFA has observed permits and quota skyrocket in value within 5-10 years of implementing new quota-based systems. CCCHFA believes that this trend will continue in New England and is eager to acquire as much quota as quickly as possible to avoid the rapidly escalating prices that can be expected.

Market Opportunities - Scallop, Groundfish and Lobster
The Cape Cod Fisheries Trust conducted rapid appraisal of New England fish quota markets and balanced local Cape Cod business and environmental needs to prioritize the most pressing markets for immediate investment. Scallop and groundfish are the two best opportunities for quota buying in New England. Lobster is an important market but urgency is low. Monkfish, skate, dogfish and other fisheries may transition to quota within 3-5 years and the Trust will monitor these fisheries accordingly.

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

The CCFT has emerged as the pre-eminent leader in the field of using Fishery Trusts to protect rural fishing communities in New England and around the country. Ideas and innovations pioneered at CCFT are spreading at a rapid rate to other localities in Maine (Port Clyde & Stonington), Massachusetts (Gloucester & the South Shore), and Rhode Island. The purchase and management of fishing quota by communities provides hope for many towns to survive the transition to privatized fishing rights.

Recent and pending changes to the regulations of the northeast multispecies and scallop fisheries represent important opportunities to further the goals of the Cape Cod Fisheries Trust. Both fisheries are transitioning away from failed policies to more effective systems of management in order to better protect fisheries resources; however, neither plan contains the necessary regulatory safeguards to preserve the small fishing communities of New England.

Currently, the Cape Cod Fisheries Trust is working to address these potentially catastrophic regulatory shortcomings through focused outreach campaigns to educate decision-makers at all levels. With limited existing regional knowledge regarding the challenges of crafting functional output-control management regimes, these outreach efforts are vital to the success of these transitions. The Cape Cod Fishery Trust will conduct focused outreach and dissemination of threats, opportunities and lessons learned to other communities, as well as working to revise management plans so that Fishery Trusts are supported in political, regulatory, and community arenas . CCCHFA staff and fishermen will:

- Conduct outreach visits and educational seminars.
- Implement a media plan including opinion pieces, editorials and earned media.
- Include language in both the Multispecies Amendment 16 and the Scallop Amendment 15 that explicitly recognizes community-based, non-profit financing organizations and supports their role in protecting affordable access for local fishermen and ensuring the survival of traditional fishing communities.
- Work with regional fishery managers to build an understanding of the benefits of Fishery Trusts to the performance of catch share and other modern fishery management plans.

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

Leadership at CCFT and CCCHFA are working with fishermen and communities in Alaska, the West Coast, the Gulf of Mexico and even abroad to share lessons learned regarding the use of Fishery Trusts to protect traditional fisheries, jobs, and the environment. CCFT is sharing important lessons learned regarding:

- Structure & Governance
- Fundraising & Capitalization
- Purchasing permits
- Permit Management including allocation and pricing
- Marketing and seafood value added

How will this project increase the availability of clean energy?

NA

How will this project decrease demand for fossil fuels?

NA

Priority Number	ID - 002

Priority Project Summary

Project Title	**Energy Demand Reduction - Greening Existing Buildings**
Goal of the Project	Lower the energy usage of residential, commercial, and municipal buildings in Barnstable County through investments in energy efficiency, renewable energy, and high-performance green building.
Description	☆ Utilize rate payer funded energy efficiency (EE) programs and other identified funding sources to combine elements of traditional energy audits with ENERGY STAR new construction applications using a comprehensive "whole building approach." ☆ Create a revolving loan fund and/or a betterment program in order to defray the cost to local businesses and residents of energy efficiency upgrades, smart energy monitoring systems, smart meters, and/or renewable energy applications. These funds would supplement existing rate payer-funded EE programs. ☆ Expand existing three-year Clean Energy Training Program for the building trades with new funding sources and newly designed training elements to create and maintain green jobs in the construction industry. ☆ Complete a demonstration project illustrating how a historic structure can be retrofitted for energy efficiency without compromising its historic character and value to the community as a whole.
Overall Project Benefits	☆ Reduced energy costs: The proposed 2009 investment of $13 million of rate payer energy efficiency funds will result in a net benefit of $41 million in reduced energy costs through the programs administered through Cape Light Compact. ☆ Increased disposable income and improved productivity for businesses and industries due to savings resulting from lower energy costs. ☆ Reduced Energy Demand: Energy efficiency reduces demand for energy and generates significant environmental benefits such as reduced air pollution and greenhouse gas emissions. ☆ Energy efficiency measures, renewable energy applications and green building reduce energy demand from fossil fueled power plants, thereby reducing air pollution and greenhouse gases and improving overall air quality. ☆ Stimulate Industry and Job Growth: Demand for energy efficiency measures, renewable energy applications and green building presents an opportunity to create a large number of green jobs within our regional building trades workforce and Cape Cod's design/build community.
Job Creation	Construction: TBD
	Permanent: Over three years, it is anticipated that rate payer funded energy efficiency programs alone will create 330 jobs in Barnstable County.16

[16] 2010-2012 Massachusetts Joint Statewide Three-Year Electric Energy Efficiency Plan

Measures of Success	Quantitative: ☆ Change in average energy cost to the user. ☆ Change in energy prices overall. ☆ Number of structures retrofitted as per audits. ☆ Number of smart energy monitoring and smart metering systems installed.
	Qualitative: ☆ Greater community awareness of the need for and benefits of energy efficiency upgrades.

Type of Project	Technical Assistance		
Target Population	200,000 residential electric customers, homeowners, businesses, municipalities.		
Towns Impacted	All 15 Towns in Barnstable County		
Lead Organization	Barnstable County/Cape Light Compact		
Partner Organizations	Cape Cod Economic Development Council, Cape Cod Commission, NSTAR, National Grid, Low Income Affordability Network, Northeast Energy Efficiency Partnership, and Massachusetts Energy Efficiency Advisory Council, Cape and Islands Self-Reliance Corporation, and others.		
Duration	On-going		
Total Cost (If on-going insert annual cost)	$13 million for rate payer funded EE programs. Cost of other program components to be determined.	Public Share: $10,067,635 for rate payer funded EE programs (the ratio of public/private investment should stay approximately the same as budgets increase).	Private Share: $2,932,365 for rate payer funded EE programs.

How will this project serve one or more economically distressed populations?
At least 10% of the funds will be targeted to low income customers and small businesses.

How will this project improve competition within the region?
Reducing energy consumption for residents and business will increase disposable income and free up capital for reinvestment in a business. Lower overall energy costs will allow Barnstable County to encourage business to locate within the County due to lower operating costs compared to adjacent counties.

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

Being a leader in energy efficiency will allow Barnstable County to reduce its energy bill and carbon footprint. This may offer the County a "selling point" in both the national and global economy.

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

As funds are allocated for energy efficiency programs new businesses should be developed to deliver programs.

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

Energy efficiency offers an opportunity for job growth in the region. Barnstable County is currently investing in educational and training programs at Cape Cod Community College and the technical high schools. Individuals trained in this field will export their services throughout Massachusetts and the New England area.

How will this project increase the availability of clean energy?

Energy efficiency is the foundation for clean and renewable energy projects. The first step from a cost benefits analysis is to reduce energy load prior to installing clean and/or renewable energy technologies. For example, a clean burning natural gas fired residential heating system may be subsidized through an energy efficiency program. A second example would be the need to install a smaller PV system to serve a building because you have reduced the buildings overall energy load. A smaller PV system costs less and this may lead to more installations.

How will this project decrease demand for fossil fuels?

Using less energy as a result of implementing energy efficiency measures will require less output (amount of time plant operates) from fossil fueled power plants.

Priority Number	WD - 003

Priority Project Summary

Project Title	**Entrepreneurship Capital Access & Training Program**
Goal of the Project	To continue and expand ongoing efforts to stimulate economic development on Cape Cod by leveraging early-stage technology, particularly that derived from the Woods Hole marine sciences institutions, and by providing entrepreneurship training
Description	Cape Cod is home to over 8,600 employers with 75,544 employees; the total annual payroll for all employers is $2.7 billion in 2006 (US Census, County Business Patterns). Ninety percent of these employers have a workforce of less than twenty; sixty percent employ fewer than five employees. Cape Cod is also home to 24,105 non-employer sole proprietors with over $1.2 billion in total receipts. Clearly, entrepreneurship is essential to the Cape Cod economy. Yet, in the case of both employers and non-employers at least a quarter of these enterprises are in sectors serving the tourist, second-home, and retiree populations. This project aims to add balance and diversity to the local economy by directing that entrepreneurial spirit and tradition toward increasing the number of technology based internationally competitive start-up businesses on Cape Cod. **Developing the Entrepreneur** This element of the program would focus on the development of entrepreneurs through experiential learning programs that would tap the spirit of competition while developing the teamwork skills of prospective entrepreneurs. Training concepts include: ☆ Business Plan Competition – an educational program, perhaps fashioned after the MIT $100K Entrepreneur Competition, that would bring together students, researchers, and a network of entrepreneurs, investors, and potential partners. ☆ Entrepreneurship Weekend – would be entrepreneurs team up and work with actual entrepreneurs to develop a business concept to be judged for its likelihood of success; potential funders including angel investors are present. This program will be used to develop formal links with local school districts to create business-school partnerships, provide training opportunities for teachers to improve their understanding of entrepreneurship and the opportunities it affords, and develop curriculum in the principles of entrepreneurship. **Targeted Business Assistance** Another element of this project would be a targeted business development program for entrepreneurs venturing into the fields of information technology or other technology driven activities. Assistance would further focus on existing but early-stage companies, helping them with strategic development, fund raising and general business management. **Commercialization & Capital Access** The goal of this element would be to establish a program directly linking entrepreneurs, scientists, industry leaders and investors in identifying, funding, and launching new commercial entities on Cape Cod. The program will include: ☆ Establish a routine meeting and presentation of new company concepts which will provide feedback and appropriate mentoring if warranted. ☆ Incorporation of the Small Business Innovation Research grant program into new and existing

	companies eligible for funding. This is currently a totally under-utilized federal resource in the Cape Cod region. ✯ Develop an overall strategic plan for the development of the technology sector on Cape Cod with support from the Woods Hole based institutions, the Cape Cod Community College and selected industry leaders and entrepreneurs relevant to the market sectors being reviewed. This may include development of incubator facilities and formation of a private Cape Cod focused investment fund. Together, the three elements of this project form a "continuum of care" model for entrepreneurship on Cape Cod. The project would be led by the Regional Technology Development Center (RTDC) in partnership with the Cape Cod Chamber and its affiliated organizations the Coastal Community Capital, the EntreCenter, and the Technology Council. The RTDC is a non-profit corporation established in 2007 to stimulate new technology-based employment on Cape Cod. The RTDC's initial focus has been on the commercialization of technology derived from the marine and other research institutions in Woods Hole, MA – an internationally recognized center of excellence in research in marine, environmental, and life sciences. In January of this year, the RTDC formalized its relationship with the Woods Hole Oceanographic Institution (WHOI) and the Marine Biological Laboratory (MBL) through a contractual relationship to assume full responsibility for their respective technology transfer activities. As such, the RTDC is responsible for all aspects of technology transfer from intellectual property licensing to starting new company ventures. The RTDC also supports negotiations for research collaborations to commercialize intellectual property. The RTDC employs a unique Innovation Accelerator (IA) model, which distinguishes it from conventional incubators and other programs that support emerging technology. The IA model includes: ✯ Pro-active technology identification using industry experienced staff. ✯ Market focused approach with strong industry-based advisory input. ✯ Ability to perform "technology linking" between research institutions, the technology. industry and the end users of the technology. ✯ Qualifying technology and initiating new company formation for possible venture capital, angel or corporate investment. ✯ Serving as interim new company management (if required). The economic impact of the RTDC is in its ability to bring significant economic value back to the affiliated institutions, which in turn supports further research and development, the hiring of additional scientists, engineers and other employees and the expansion of programs, which have both a direct and indirect positive effect on the local and regional economy. It is also envisioned that, through these technology transfer initiatives, the RTDC will be successful in spinning out new, entrepreneurial companies as well as identifying commercial licensing partners within the Cape Cod region, which will also serve to enhance the regional economic and employment numbers. To fulfill its mission the RTDC has successfully attracted both public and private funding. The Commonwealth of Massachusetts has provided general appropriation, and grant funding was awarded through the Massachusetts Technology Collaborative - John Adams Innovation Institute. Regional funding came from Barnstable County through the Cape Cod Economic Development Council. The Woods Hole Oceanographic Institution (WHOI) and the Marine Biological Laboratory (MBL) have provided private funding.

Overall Project Benefits	✯ Increased technology transfer from leading research institutions located on Cape Cod. ✯ New business ventures – hopefully located on the Cape – as a result of this technology transfer. ✯ Support for the development of emerging industry sectors that promise to offer well paid, skilled jobs and provide year-round career opportunities for residents. ✯ Reduced dependence on the tourism and retiree driven sectors – retail, food/accommodations, and health care – that dominate the regional economy. ✯ Deeper understanding of the needs of Cape-based businesses and entrepreneurs that can be leveraged to stimulate the creation of specific types of businesses, e.g. those in knowledge-based industries that are capable of generating higher-income jobs. ✯ Supports the retention and attraction business and worker – particularly those in the early stages of their working lives that find it increasingly difficult to cope with the cost-of-living on Cape Cod. ✯ Create a more diverse sustainable small business community on Cape Cod.
Job Creation	Construction: NA
	Permanent: Direct: 4 FTE Indirect:
Measures of Success	Quantitative: Process Measures ✯ Training programs offered ✯ Number of participants in training programs ✯ $$ obtained through SBIR and related programs Outcome Measures ✯ Patents secured ✯ Firms incorporated and revenues generated ✯ Venture and private funding invested ✯ Jobs created & wages paid
	Qualitative: ✯ Reputation of Cape Cod as a region that supports and values entrepreneurs ✯ Increasing number of "fundable" concepts

Type of Project	Technical Assistance
Target Population	Entrepreneurs and would-be entrepreneurs
Towns Impacted	Region-wide
Lead Organization	Regional Technology Development Center in partnership with the Cape Cod Chamber of Commerce.

Partner Organizations	Cape & Islands Community Development (Coastal Community Capital), Cape Cod Economic Development Council/Barnstable County, Cape Cod Technology Council, Cape Cod Young Professionals, Cape Cod Community College, SCORE, Community Development Partnership, Cape & Islands Workforce Investment Board, Woods Hole Oceanographic Institute, and the Marine Biological Laboratory.		
Duration	Start-up phase would likely be 2 years; the goal is to develop a sustainable program.		
Total Cost (If on-going insert annual cost)	$1.7M	Public Share: TBD	Private Share: TBD

How will this project serve one or more economically distressed populations?
Entrepreneurship training programs will target students of limited means and unemployed or underemployed adults.

How will this project improve competition within the region?
Overall, this program should 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?
The project will pro-active seek out specific global market opportunities, link these with WHOI & MBL based technologies, as well as with existing Cape Cod marine technology companies, where applicable. Similar efforts will be made in other technology niches as these are developed.

How will this project support innovation and entrepreneurship in the region?
The mission of this project is to support innovation and entrepreneurship through training, direct business management assistance, and bring new technologies to the market.

What products or services will be exported out of the region as a result of this project?
It is anticipated that the 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?
The RTDC is already active in the clean energy generation and technology development sector as a key partner in a proposed bio-fuel generation pilot facility that uses saltwater, cool climate algae as feedstock.

How will this project decrease demand for fossil fuels?
Development of viable and globally competitive businesses on Cape Cod should reduce commuting distances; as should opportunities to work remotely – common practice among sole proprietors in professional and other fields that trade in intellectual capital

On-going Economic Development Programs & Planning Activities

Economic Development Planning: The Cape Cod Commission currently has one full-time staff person – the Economic Development Officer - dedicated to understanding the region's economy. To complete this CEDS update additional financial support came from the Cape Cod Economic Development Council. As much as possible, the EDC - also a staff of one - provided staff support for the update. In Phase 1 of the CEDS Update, the Commission accomplished a number of research projects, finished the first stages of a data dissemination web-site called STATS CapeCod, and orchestrated the extensive Phase 2 planning process. Continuation of the research, data dissemination, and outreach programs - described in greater detail below - is imperative.

- Research & Policy Development: Over the past year, the Commission started a white paper series covering different economic development issues. Titled "Myth or Fact", the papers published to date address the economic, fiscal, market, and social impacts of chain stores, development density, green building practices, and families with children. The Commission also completed a survey of second-home owners to better understand current and future patterns of home use, local spending on products and services, and use of public facilities and infrastructure. A remarkable 30% response rate showed that second-home owners primarily use their homes themselves rather than as rentals, do their majority of spending locally, strongly support arts and culture, are poorly served by public infrastructure (particularly broadband service), and that over the next 15 years, 22% of them plan to move to Cape Cod full-time. The goal is to conduct a survey annually, rotating between second-home owners, full-time residents, and local businesses.

- Data Dissemination & Analysis: The Commission is in the process of building an effective, manageable, data infrastructure that will improve our ability to provide data to businesses, municipalities, and the public. The initial steps in developing this system have been the development of a pilot data dissemination website that provides dynamic profiles that are automatically generated using the most current data. The site is called STATS CapeCod and is being developed in partnership with STATS America, based at the Indiana Business Research Center at Indiana University. The framework for a series of benchmarks to gauge the overall diversity, efficiency, compatibility, and wealth of the region's economy was also developed. Remaining is the creation of dynamic town level profiles and a database of local primary and secondary data. The long-term goal is to integrate the system with the County's Geographic Information Systems infrastructure.

- Direct Technical Assistance: Commission staff works directly with towns and other partner agencies on specific projects as they arise. In the last year, staff undertook an analysis of tax increment financing as a tool for downtown revitalization, helped with the design of a fiscal impact model, and helped design an economic research study and associated planning process for different towns on the Cape.

Related Regional Planning Activities: The Cape Cod Commission is currently involved in a number of regional and local planning projects that relate to economic development and sustainability.

- Regional Wastewater Plan: As a first step toward completing a Regional Wastewater Management Plan (RWMP), the Cape Cod Commission is working with the Cape Cod Water Protection

Collaborative to conduct data collection, analysis, and mapping to identify existing conditions, areas of impaired water quality, and opportunities for regional solutions to address impaired watersheds across Cape Cod. Included in this effort is the development of a model to estimate costs of wastewater infrastructure Cape-wide and in shared watersheds, including costs of future growth. Regional wastewater planning work is particularly important because Cape municipalities have recently gained access to low interest State Revolving Loan Fund (SRF) loans to fund wastewater infrastructure. The development of the RWMP will result in improved coordination between wastewater and land use planning for the region, and will identify opportunities for regional wastewater solutions that may result in savings to individual cities and towns.

- Regional Open Space Plan: The County has begun a mapping analysis and planning effort to identify a "green infrastructure" for Cape Cod. The plan will inform regulatory and non-regulatory actions to prioritize and preserve open space on Cape Cod. The plan is intended to work in concert with the Land Use Vision Map, guiding development and reinvestment toward designated Economic Centers, Villages, and Industrial Areas, and away from Resource Protection Areas. The plan will bring together in one place a series of maps, analysis, and recommendations identifying open space connections and areas for new acquisitions, and next steps for additional plans/analyses to further goals for agricultural protection, cultural landscapes, climate change adaptation, Pathways connections, and water supply protection.

- Solid Waste Planning: The Cape Cod Commission is assisting the Cape towns in an analysis of alternatives to their current waste disposal contracts. Fourteen of the fifteen municipalities of Barnstable County are currently under contract with Covanta/SEMASS for the disposal of Municipal Solid Waste ("MSW") under existing Waste Acquisition Agreements (WAAs). Those WAAs are due to expire on or about 2015. The Cape communities have been approached about extending their WAAs under specified terms. The Cape-wide solid waste alternative analysis will provide towns with information they need to fully consider their options for MSW disposal into the future. In addition, the Commission is committed to seeking funding for a study of options for increasing levels of recycling among Cape Codders and their visitors to reduce the MSW waste stream.

- Regional & Local Pre-Disaster Mitigation Plan Updates: The Regional and Local PDM Plans – now referred to as Multi-Hazard Mitigation Plans going forward – will expire March 2010. For the towns and the regional to remain eligible for Hazard Mitigation Grant Funding through FEMA, the plans must be updated. Commission staff hosted a kick-off meeting June 2nd for town planners and regional representatives to facilitate the update process at both the regional and local level. In addition, the Multi-Hazard Mitigation Planning process will serve as a platform for incorporating climate change data and trends. The regional planning team consists of climate experts and costal geologists to help us with this goal, which will help build a foundation for climate adaptation planning and mitigation strategies for Cape Cod. Each of the 9 towns that developed a plan in 2004 will participate in the update process, and at least 4 of the remaining towns will develop plans for the first time.

- Floodplain Management Model Bylaw: Cape Cod Commission staff and County Cooperative Extension and WHOI Sea Grant program staff developed a model floodplain bylaw and technical

memorandum under a grant from the National Sea Grant Law Center, entitled "Effectively Managing Coastal Floodplain Development: A National Model Coastal Floodplain Bylaw." The bylaw consists of two parts, a technical memorandum and a model regulation.

- Regional Green Communities Act Designation: The County is currently writing the draft application for a regional 'Green Community' designation. The Division of Green Communities finalized the regulations for this process in June 2009. We anticipate that at least 10 of the 15 towns will participate in the pursuit for a regional designation. Of the remaining towns, Falmouth and Barnstable are pursuing the Green Communities designation independent and in advance of the regional process, but will have the opportunity to opt in once the regional application has been approved.

- Affordable Housing Planning: *Regional Update of Chapter 40B Projects* - In December 2008 Commission staff completed its annual regional update of Chapter 40B affordable housing developments. Staff found that the comprehensive permit process continues to be critical for the ability of the region to create housing that is affordable for low income households. The study found that 40% of all the affordable housing in the region has been permitted via Chapter 40B; that 57% of the units in Chapter 40B developments are affordable; that 2/3 of the housing units created under Chapter 40B are rental units; and that the median Chapter 40B project size is 18 units.

  Analysis of the Costs of Homelessness Study - At February 19, 2009 press conference the Commission released the results of a year-long study that compared the costs associated with being homeless on the street or in shelters with the costs associated with housing formerly homeless individuals in some type of supportive housing. The study, one of the recommended action items of the 2005 regional Ten-Year Plan to End Homelessness, found that study participants generally had a long history of local ties to or residence on Cape Cod; had an average of five years as homeless; and generally had physical and/or mental health issues along with current or past alcohol/substance abuse issues. The study also found that the public costs of providing permanent supportive housing was 12% less than the costs associated with individuals living on the street or in shelters.

  Regional Housing Authority Study - In February 2009 the Commission agreed to provide technical assistance to at least four towns on the Outer Cape to assess the feasibility of and to create a template of options for the creation of a regional housing authority. The detailed scope of the study and the possibility of expanding the number of communities involved are currently under discussion.

- Regional Transportation Plan & Transportation Improvement Program: Cape Cod Commission staff conducts the comprehensive, cooperative, and continuing transportation planning process for the region in partnership with federal, state, regional, local representatives, and the public. The Cape Cod region was designated as a Metropolitan Planning Organization (MPO), following the 1990 United States Census of Population. As staff to the MPO, the Cape Cod Commission is responsible for the coordination of the regional transportation planning efforts as established under federal legislation, the *Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users* (SAFETEA-LU). Cape Cod Commission staff is also staff for the Cape Cod Joint Transportation Committee (CCJTC), the local advisory group for the MPO, which includes members from all

fifteen towns. The Cape Cod Joint Transportation Committee discusses local, regional, state, and federal transportation planning policies, programs, and specific studies and projects at regular monthly meetings at the Barnstable County / Cape Cod Commission offices. For more information on the TIP or Members, please see the Web site: www.gocapecod.org/tip. Two of the major regular transportation planning documents produced by the Cape Cod Commission is the *Regional Transportation Plan (RTP)* and the *Transportation Improvement Program (TIP).*

Regional Transportation Plan (RTP) - The RTP is the long-range (20-year) transportation planning document for Cape Cod. The existing conditions of the transportation system are reviewed - airplanes, bicycle, bus, car, ferry, pedestrian, rail, truck - and, policies, concepts, and priorities for improvements in the system are proposed for the region. Data collection, outreach to stakeholders, and a public process assist in sorting and narrowing the proposed system improvements into the RTP project recommendations. Projects must also comply with the air quality conformance program for the Eastern Massachusetts Non-Attainment Area. The RTP is updated, under current federal law, at least once every four years - with the latest RTP endorsed by the Cape Cod Metropolitan Planning Organization (MPO) in March 2007.

Transportation Improvement Program (TIP) - The TIP includes specific federal aid eligible projects drawn from the RTP that are to be implemented in the short range. The TIP four year list of projects must fit within the estimated available federal, state, and local financial resources. Federal funding for the TIP is typically 80% of the total—through Federal Transit Administration and Federal Highway Administration, and provides for implementation of surface transportation projects, such as: local transit services, roadway, bicycle, pedestrian, and ferry projects. The TIP is required to be updated every four years under federal law, but in Massachusetts, the TIP is updated annually or more.

- Route 6A Corridor Management Plan update: Commission staff is working on an update to the 1995 Route 6A Corridor Management Plan, to be completed in the fall of 2009. The purpose of the plan is to guide resource protection and address traffic and safety needs along the corridor.

Related Local Planning Activities: Planning projects that address issues in individual towns are also underway with the assistance of Commission staff. These include:

- Falmouth: Commission staff is currently assisting the town with the update of their local comprehensive plan. Once updated the plan will be submitted to the Commission for certification that it is consistent with the Regional Policy Plan. The town and the Commission are also completing a feasibility study to determine if tax increment financing (called District Improvement Financing in Massachusetts) could be used as a revitalization tool for a downtown area; generally this tool is used as part of a package to attract a large employer to an area.

- Eastham: Commission staff provided initial analysis of traffic, water supply, and wastewater issues to the town in its planning for the Brackett Road area and the town-owned 10-acre "Purcell Property," and anticipates providing further analysis of drinking water and wastewater needs as the town proceeds in its planning for the area.

- Bourne: Commission staff is working closely with the town on their efforts to revitalize Main Street Buzzards Bay. The town plans to submit a Growth Incentive Zone (GIZ) application to the Commission within the 2009 calendar year. Designation as a GIZ provides regulatory relief at the regional level once a certain level of infrastructure capacity is developed and appropriate zoning for a mixed-use downtown center has been adopted.

- Mashpee: Commission staff will be working with the town to update their local comprehensive plan, with their Economic Development Industrial Corporation (EDIC) on their industrial park, and with the developer of Mashpee Commons, a new urbanism style development seeking to expand.

- Sandwich: The Town of Sandwich owns a large tract of land they would like to see developed into a mixed-use village center. The Commission will continue to work with the town to identify development options, impacts, and infrastructure needs and opportunities. Sandwich is also interested in redeveloping its harbor area and will be working closely with Commission staff on this as well.

- Barnstable: *Barnstable Hilton Garden Inn* - Cape Cod Commission staff assisted the Town of Barnstable Zoning Board of Appeals with outlining the transportation and community character impacts of the Hilton Garden Inn project on Route 28. Commission staff outlined the safety, capacity, and pedestrian/bicycle safety concerns along the roadway corridor. Commission staff also provided video and graphics of the proposed building mass to assist the Board in visualizing the impact and appearance of the proposed structure on surrounding uses and roadway.

  Barnstable Route 6A Tree Committee - Commission staff is participating in the regular meetings of Barnstable Route 6A Vegetation Committee. The committee is working on issues concerning the decline and replacement of the corridor's distinctive tree canopy as well as provision of pedestrian paths and road crossings that are consistent with the character of the roadway.

- Yarmouth: *Yarmouth Route 28 Study* - Cape Cod Commission staff has participated in the development of the scope of a market study for the portion of Route 28 in Yarmouth and continue to provide assistance and comment on the findings of the study that is funded in part by the Cape Cod Commission. The study is the first phase of a multi-part plan by the town to revitalize the areas along the Route 28 corridor by exploring potential changes in zoning.

- Dennis: Staff have completed the technical analysis for the proposed Dennisport GIZ , and done a partial analysis for a couple different development proposals in the 40R district. Both the GIZ and the 40R district have been put on hold at the request of the town. Once staff are asked to resume the process, the GIZ should proceed to a hearing (pending some additional information from the town) and staff can resume technical analysis on the 40R district once the town arrives at a preferred development proposal.

- Harwich: *East Harwich Revitalization* - Cape Cod Commission staff provided on-going technical assistance to the Town of Harwich as part of collaborative effort to revitalize East Harwich. Commission staff have participated in meetings of the advisory/steering committee for the three-

year project and contributed to public hearings and discussions on efforts to create a plan for the village center.

Harwich Center Initiative - Cape Cod Commission staff provided technical assistance to the Town of Harwich by providing comprehensive transportation and land use planning for Harwich Center. Commission staff conducted traffic counts along Main Street and the surrounding roadways, provided the town with an assessment of the current pedestrian/bicycle infrastructure, and provide concept plans for transportation improvements (both pedestrian/bicycle and vehicular) in the downtown area. The Commission staff also provided guidance on a range of zoning, parking and infrastructure options to consider assisting in the revitalization of the area, providing a series of photo-simulations of the Harwich Center showing different build-out scenarios.

South Harwich Meeting House restoration - Commission staff has made site visits to this National Register-listed meetinghouse to discuss preservation methodology and preferred means for preserving the building's character-defining architectural features and interior finishes. Staff has provided advisory assistance regarding ways to address accessibility and public egress requirements on several occasions.

Harwich Open Space Plan update – Commission staff has been working with the town of Harwich Planning Board and Town Planner to revise the Harwich Open Space and Recreation Plan consistent with state requirements. The goal is to update the plan to reflect current challenges and open space priorities, and identify actions for the next five years. Staff have incorporated current plans, studies, and updated all of the maps with current GIS data.

Harwich Local Comprehensive Plan update - Commission staff will be assisting the town in preparation of an update to the town's Local Comprehensive Plan.

- Chatham: *Historic district work* - Commission staff continues to provide assistance to the Historical Commission in evaluating plans for rehabilitation of National Register-listed structures. Staff has also provided information about methods for protecting archaeological resources in the community.

  Workforce Housing Bylaw/District - Commission staff will provide technical assistance to the Town of Chatham to define and identify the need for workforce housing for a greater range of incomes in the Town; to identify programmatic and policy issues that will need to be addressed for any workforce housing bylaw; to draft a workforce housing zoning bylaw; and to identify potential workforce housing overlay districts that are consistent with sustainable development principles.

In addition to the work being undertaken by the Cape Cod Commission are the on-going programs of the other economic development related organizations in the region. A number of these programs are included in Appendix 11 which is a compendium of on-going economic development activities by partner organizations to the County.

Local Capital Projects

The following is a list of local capital projects provided by towns to the Commission; none were received from Dennis, Harwich, or Mashpee. The majority of these were submitted to the State earlier this year as

shovel ready projects for which stimulus funds might be sought. Others are longer-term projects currently under discussion or in earlier phases of design. These have been included to enable towns in the region to seek support from EDA for these projects. More detailed descriptions of these projects are included in Appendix 12. Local and regional capital projects related to transportation are included in the CEDS as they are outlined in the Regional Transportation Plan and the Cape Cod Transportation Improvement Program (TIP).

TOWN	PROJECT NAME
Barnstable	Hyannis Downtown Water Supply & Wastewater Infrastructure Improvements
Barnstable	Airport Rotary Re-design
Barnstable	Barnstable Harbor Bulkhead Repairs
Barnstable	Hyannis Downtown Transportation Improvements & Cultural Center
Bourne	Green Technology Park
Bourne	Buzzards Bay Wastewater Infrastructure Expansion
Bourne	Gas-to-Energy Project at Bourne Municipal Solid Waste Facility
Brewster	Public Facilities Energy Efficiency Retrofits
Brewster	Drainage improvements for Herring Run
Brewster	Crosby Mansion Septic
Brewster	Sidewalks along 6A
Chatham	Wastewater Implementation – Commercial Areas
Chatham	Chatham Wastewater Facility Plan & Implementation
Eastham	Bracket Rd Intersection Improvements
Eastham	Sustainable Seasonal and Transitional Housing
Falmouth	Falmouth Wastewater Infrastructure Improvements
Harwich	Harwich Center Arts and Culture Project
Harwich	East Harwich
Mashpee	Mashpee Industrial Park

TOWN	PROJECT NAME
Orleans	Watershed Wind Turbine Project
Orleans	Main Street Sidewalk Extension
Orleans	Orleans Downtown Wide Area Network Telecommunication Infrastructure
Orleans	Orleans Wastewater Facility Plan
Provincetown	Fisherman's Wharf Acquisition & Rehabilitation
Provincetown	North Union Field - New Water Supply
Provincetown	Commercial Street Re-development
Provincetown	Wastewater Collection System - Phase 3 Expansion
Provincetown	Ryder Street Drainage Improvements
Sandwich	Wastewater Treatment
Sandwich	South Sandwich Village Center & Route 130 Industrial Park
Sandwich	Exit 2 Improvements
Truro	Pamet Harbor Repairs: North Jetty & Parking Lot
Wellfleet	Water System Expansion
Wellfleet	Outer Cape Health Expansion
Wellfleet	Wastewater Planning
Yarmouth	Wastewater Treatment Phases 1 & 2
Yarmouth	Roadway Improvements on Route 28

CHAPTER 5: CEDS IMPLEMENTATION & PERFORMANCE MEASURES

Implementation & Evaluation

The 2009 update of the CEDS five-year plan has focused on implementation from the start. Phase 1 of the CEDS update focused on developing an information and data infrastructure to support planning, implementation, and evaluation of the CEDS. The regional planning process in Phase 2 was about adopting a plan that included specific projects that could be implemented within the five-year timeframe. Participants did not revisit the visioning work done as part of the Regional Policy Plan update but instead focused their energy on identifying the projects they felt would propel the region forward and enable the regional economy to blossom once the international recession subsided. Establishing a similarly inclusive annual evaluation process with maintain the remarkable energy and cohesion seen in Phase 2. This annual evaluation process will improve the likelihood of success in implementing of the CEDS.

Implementation Plan

Successful implementation of the CEDS will require County leadership; Commission staff must have the resources to inform and coordinate participants on an on-going basis. The work of both Phase 1 and Phase 2 must be continued forward and institutionalized as the standard mode of operation. In order to maintain the momentum, optimism, and good will created during the CEDS planning process, the Commission proposes the following workplan. This plan would be executed in partnership with the Economic Development Council but would also require the Commission to secure additional funding. Therefore, a first step in the implementation process will be an application to the EDA for a planning grant.

Data, Research, and Information

- Complete the development of *STATS CapeCod*.
- Continue the *Myth or Fact?* Series of topical white papers.
- Develop an educational program focused on the availability and use of economic data.
- Annual survey program – rotate on annual basis between three major populations: residents, second-home owners, and businesses.

Public Outreach

- CEDS implementation "kick-off" meeting with all partners and municipalities.
- Regular presentations to stakeholder groups on implementation of the CEDS.
- Workshops on obtaining EDA and other funding for priority projects.
- Presentations of research – including press conferences and in-depth workshops.
- Rotating outreach to town economic development committees and EDIC organizations.

Execution of Regional Priority Projects

- Submit a planning grant to the EDA to support an additional position.
- Assist partner organizations in obtaining EDA and other funding for priority projects.
- Assist partner organizations in developing more detailed work plans for the regional priority projects currently at the concept only stage.

Direct Technical Assistance to Economic Centers

- Identify impediments to the development of economic centers.
- Identify opportunities in these centers to execute priority projects.
- Provide intensive, tactical assistance to towns to tackle impediments to develop in economic centers by leveraging the technical skills of the Commission and the knowledge and funding of the EDC.

The following table attempts to project this workplan over the five year lifespan of this CEDS update. The activities are described in the year they will be initiated. In many instances these activities will continue throughout the five-year implementation period.

Cape Cod Commission / Barnstable County Implementation Plan					
Action	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
Economic Development Planning	•Apply for EDA Planning Grant •Obtain EDD status •Design CEDS evaluation/annual review planning process and implement •Complete CEDS Annual Report	•Analysis of RPP from an ED perspective	•Regional Cost-of-doing Business Analysis	•Regional Market Analyses	• Fiscal Impact Model Developed
Research	•2 white papers •Further analysis of 2nd home survey results •Survey residents	•2 white papers •Survey businesses	•3 white papers •Survey 2nd-home owners	•3 white papers •Survey residents	•3 white papers •Survey businesses
Outreach	•2nd-home Survey Workshops •CEDS Implementation Kick-off •STATS CapeCod Launch •White Paper Presentations •CEDS progress reports •Inclusion of local economic development committees and EDICs into the CEDS process	•TBD through an annual PR plan	•TBD through an annual PR plan	•TBD through an annual PR plan	•TBD through an annual PR plan
Data Dissemination	•STATS CapeCod development •Balanced Economy Benchmarks – develop databases and presentation of data •Create Dynamic USA Town Profiles •Create in-house databases for local primary and secondary data	•Time Series Profiles	•Create your own sub-region profiles	•TBD	•TBD
Regional Priority Projects – Lead	•Scope Coastal Use Templates; establish planning team & structure •Scope Redevelopment Authority Feasibility Study, complete case study research •Development in Economic Centers Cost Analysis	•Complete Coastal Use Mapping •Complete Redevelopment Feasibility Analysis	•Design Coastal Use Templates	•Adoption of Coastal Templates	•Adoption of Coastal Templates

Cape Cod Commission / Barnstable County Implementation Plan					
Action	**Year 1**	**Year 2**	**Year 3**	**Year 4**	**Year 5**
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. •Collaborate in completion of the Development in Economic Centers Cost Analysis and the Redevelopment Authority Feasibility Analysis	•Help obtain funding for… •Collaborate in the completion of…	•Help obtain funding for… •Collaborate in the completion of…	•Help obtain funding for… •Collaborate in the completion of…	•Help obtain funding for… •Collaborate in the completion of…
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	• Ongoing	• Ongoing	• Ongoing	• Ongoing

CEDS Annual Evaluation

In addition to the implementation work plan outlined above, the County's economic development team will coordinate the annual evaluation of the CEDS. Each spring after the adoption of the five-year plan, the region's progress towards meeting the goals of the CEDS and accomplishing the projects identified as priorities must be evaluated and a report be submitted to the US Economic Development Administration.

Regional progress relative to the CEDS will be evaluated at four levels. First, a set of balanced economy benchmarks will be used to look at changes in the economy as a whole. These benchmarks are based on the same principles as the four economic development goals outlined in Chapter 3 and should indicate progress towards attaining those goals. Progress towards achieving the goal for the CEDS process itself will be the next level of assessment. Next would be the evaluation of specific projects. Quantitative and qualitative measures are identified for each of the regional priority projects on the individual project forms. Status reports for on-going economic development activities and local capital projects would be the final element of the evaluation procedure. At a minimum, the following will be part of this evaluation process:

- Meeting of Work Group chairs and strategy committee to discuss overall progress in implementing the CEDS action plan, improving coordination between all the economic development partners, and attracting investment to the region.
- Reconvene Work Group members to evaluate progress on their 3 priority projects using the quantitative and qualitative measures identified for each project in the five-year update:
  - Compile information for measures of progress
  - Update priority project forms
  - Revise priority projects as needed
- Collect evaluation reports on local capital projects and on-going economic development activities.
- Complete an annual report for the EDA that includes the results of the evaluation process along with any updated economic information and significant changes to the action plan.

In addition to this work at the regional level, next year should include a more rigorous public participation process at the municipal level around the local capital projects included in the plan.

Level 1: Overall Performance Measures - Balanced Economy Benchmarks

The Cape Cod Commission is in the process of developing a set of benchmarks to provide an annual assessment of the region's progress towards achieving an increasingly balanced and sustainable economy. We hope to gauge our progress by using measures based on the four basic principles of economic development: diversity, wealth, efficiency, and compatibility. The following table outlines each measure, the data and variables to be used and the graphic presentation envisioned.

Diversity Economic strength and sustainability benefit from a mixture of industries, businesses, workers, ownership types, and employment options							
Measure name	**Measure of…**	**Population**	**Variables Measured**	**Measure type**	**Graphic style**	**Dataset**	**Data source**
Seasonal Economy	How seasonal is the Cape's economy relative to the past?	Labor force All Employers	• LF total • # unemployed • # unemployed by industry • Industry employment	Snap Shot Annual time series	Pie chart: unemployment by industry Line or Bar graph: total workforce, unemployment, total industry employment: X: % difference between peak and trough Y: Years	CES ES202	BLS LMI Annual CC Profile
Business Diversity	Is the Cape still a small business economy?	Employers	• Establishments by employment size • # employees • # establishments • Annual Payroll • 1st Q Payroll	Snap Shot (most recent annual data) Indexed Time Series (base year: 1986)	Pie chart: Share of all Establishments by # employees (max 5 cohorts) w/ average wage noted in each quadrant Index Bar graph: empl. & est. by size over time 86-90-95-00-05	CBP	CENSUS
Industry Sector Diversity	How balanced is the Cape economy between core, emerging, and other industry sectors?	Employers (w/in UI system)	• Establishments • Employees • Payroll • Average wage • By industry sector	Snap Shot (most recent annual data) Indexed Time Series (base year: 2001)	Pie: core; emerging; other share of total employment (and another for total payroll?) w/ avg. wage in each quadrant Index Line graph: Line for each grouping to show change in (share of) employment and/or payroll over time	ES202	BLS
Resident Diversity	Is the Cape loosing workforce age population?	Residents	• Age • Education • Income • Race	Indexed Time Series	Share of population by age Indexed to US shares – note working age	Decennial Census	CENSUS

Income Diversity	Is the Cape's PCI high because of the wages earned by residents or is it due to other sources of income?	Money	Income by source – • Proprietor W&S • Employer W&S • Div/Int/Rents • transfer payments; • (W&S earned on vs. off cape)	Snap Shot (most recent annual data) Indexed Time Series (base year: 1970)	Pie chart: income by source as % of total income Index: change in share relative to base year	REIS	BEA
Wealth Methods include increasing exports, substituting imports locally, attracting capital, and fostering local ownership							
Measure name	**Measure of…**	**Population**	**Variables Measured**	**Measure type**	**Graphic style**	**Dataset**	**Data source**
The Pie	Overall size of the economy w/ shares by industry	Establishments by Industry	• Employments • Total payroll • average wage	Time series Real $$	Growth rings like a tree trunk – based on total annual payroll in real $$	ES202	BLS
Attracting Wealth	Export Industry Growth	Establishments	Export Industries • Sales • Employment • Payroll	Time series: 97 & 02 Location Quotient or Surplus Leakage Analysis: 97 & 02	Bar Graph of 1997 & 2002; Y: sales; X: Industries Horizontal Bar Graph of sales by industry relative to MA	Economic Census	CENSUS
Cost of Living	How much are we spending just to live here? How much is left to re-invest in the local economy?	Variety	• Fair Market Rent • Median Sale $ • Lowest Sale $ • Highest Sale $ • Energy $ • Prop tax paid • Insurance $ • Bankruptcies • Debt-to-Income	Snap shot indexed to US	Vertical Bar graph of CC costs relative to US	Various	Various
Attracting Wealth	How much money are we drawing into our economy through commuting, tourism, & 2nd home owners?	Money Establishments Property	• Total earnings in & out, place of work, place of residence, • Average wage by industry • Employee earnings, sales • Property tax paid	Snap shot: 2000 Time series: 1990-2006; X to X; 1997-2002	Pie: net income flows by industry 2000; % prop tax revenue paid by 2nd home owners Line: over time net income; 2nd H tax revenue; tourism employment	REIS Property Tax Data Economic Census	BEA Town Asses CENSUS
Structural Change	Changing employment patterns	Establishments	By industry • # establishments • # employee	2 snapshots in time indexed to US	Vertical bar graph of CC share relative to US Mini-pie showing emerging/core/other	ES202 –or- Decennial Census	BLS –or- CENSUS

			• Payroll • Avg. Wage		share of CC employment		
Creating Wealth	Are we attracting R&D $...	Federal Funds	• $ by source	Time series	Indexed against a base year for CC	Annual Federal Funds Report	CENSUS
Distribution of Wealth	Haves and Have-nots	Money	• Earnings • Other Income	Snap shot: 2002	Bar graph off Y axis; Y: income cohorts X: people/HH per cohort; bar: average % income by source for this cohort	SIPP 2002 (Report: Net Worth and Assets of Households)	CENSUS
Efficiency Resources include natural assets, capital facilities, infrastructure and human capital. Population and land use patterns affect efficiency							
Measure name	**Measure of…**	**Population**	**Variables Measured**	**Measure type**	**Graphic style**	**Dataset**	**Data source**
Overall Efficiency	Is growth going to EC and villages rather than RPA		• Population density • # parcels • # building permits	Snap shot Time series (retroactive?)	Pie chart: population by regional land use category Index line or bar chart: economic center growth indexed against base year measured in population density; parcels; building permits	Decennial Census Assessors Data Bldg permits	CENSUS *Towns*
Efficient use of resources	Amount of renewable energy generated or demand reduced locally rather than imported		• $$ saved by EE • Kwh generated on cape • Kwh imported	Time series	Indexed by base year	TBD	TBD
Efficient use of land	How much new development reuses existing structures or sites rather than green-fields	Land (Acres or parcels)	• Developed • Protected • Undeveloped	Time series	Indexed by base year	Property Tax Data	Towns
Efficient & Sufficient Infrastructure	Do we have the infrastructure we need to compete?	Telecom & Educational Infrastructure	Telecom • Coverage • Speed in & out • Redundancy Education • Institutions • Degree options • Enrollment • Graduation rates	Time series	Indexed by base year	TBD Cheery Sheets	TBD State Dept. of Education
Overtaxing	Are we continuing to be	Natural, Waste & Transportation	• Congestion ratings	Snap shot Time series	Pie: % intersection at different grades	TBD	TBD

Infrastructure	unsustainably dependent on autos and septic systems?	Infrastructure	• New septic systems • Sewer users		Line: % (unimproved) intersection below D; septic systems added vs. sewer users added		
Competitive Advantage Development should complement and build on a region's competitive strengths; for the Cape, these are our unique natural environment, historic village character, and cultural heritage							
Measure name	**Measure of…**	**Population**	**Variables Measured**	**Measure type**	**Graphic style**	**Dataset**	**Data source**
Historic Preservation	How well are we preserving our historic character	Historic Buildings	• Total built prior to XX • Renovated • Torn down	Time series	Bar graph	Assessors Building Permits	Towns
Water Quality	How well are we restoring our water bodies?	Water bodies	• Ppm nitrogen • Phosphorus • Plumes	Time series indexed to a base level of pollution	Line graph: Y: clean index; X: years	Mass Estuaries Program PALS	Cape Cod Commission
Place dependent economy	How much of our economy is tied to place?	Establishments	• Employment • Wages • total payroll	Snap shot Time series	Pie chart: industries dependent on natural resources vs. other industries Line graph: evolution of different natural resource industries over time (possible base year index…)	ES202	BLS
Arts & Culture Industry	How much of our economy is based on the arts?	Establishments	• Employment • Wages • total payroll	Time series	Bar graph showing share overtime	ES202	BLS

Level 2: CEDS Process Performance Measures

The second level of evaluation would be focused on the CEDS process itself. Has the process resulted in new capital investment in the region? Has the processed improved local understanding of economic development? Have collaborations between organizations involved in economic development gotten stronger? These are the types of question that would be used to gauge the success of the CEDS as a process and as a roadmap. The CEDS Strategy Committee would be responsible for reviewing the measures and determine if changes are needed to improve the process to achieve better results. Proposed measures are:

CEDS Process – Measures of Success		
Objective	Process/In-put Measures	Outcome Measures
Capital Investment	# of Grants Submitted $$ of Funds Awarded	$$ of Private Investment Leveraged

CEDS Process – Measures of Success		
Objective	Process/In-put Measures	Outcome Measures
Understanding of ED	# of Presentations given # of Reports published # of Articles written	TBD
Strong Partnerships	# of Partnerships # of new Partnerships	TBD
Easy Access to Information	Progress made on STATS Cape Cod	STATS Cape Cod user statistics

Level 3: Regional Priority Project Performance Measures

The actual implementation of the Regional Priority Projects is the ultimate measure of success for the CEDS overall. The success of individual projects will be measured using unique quantitative and qualitative indicators. Work Groups identified these indicators on the project forms; they may need to be adjusted however based on experience. The plan is to reconvene the Work Groups annual to evaluate their progress and have the opportunity to make any adjustments needed to the project or the measures. As part of this annual review process, the Work Groups will also be asked to judge their priority projects against the same questions they used to prioritize them during the initial round done for this five-year plan.

Priority Project Evaluation Questions	
Priority Area	Question
Funding Leveraged	How much PRIVATE investment has been dedicated to this project?
	How much TOWN funding has been dedicated to this project?
	How much COUNTY funding has been dedicated to this project?
	How much STATE funding has been dedicated to this project?
	How much FEDERAL funding has been dedicated to this project?
Higher-wage and higher-skilled jobs	How has this project helped to improve the living standards of distressed populations?
	Has this project enabled mid-wage and/or young professionals remain on the Cape?
	How has this project supported traditional resource-based industries? (fishing, agriculture...)
	How many permanent full-time jobs did this project create? More than 20?
	What are the wages paid for the jobs created by this project?

Priority Project Evaluation Questions (cont…)	
Priority Area	Question
Partnership & collaboration	Who were the public and private partners involved in this project?
	Did the project create new partnerships or expand existing partnerships?
	Did the project bring together people or organizations not typically working together?
Integrated into global market	What new products/services not previously provided on Cape resulted from this project?
	How did this project decrease regional dependence on fossil fuels?
	How did this project increase the viability and use of renewable fuels?
	How did this project increase the export of products and/or services?
Entrepreneurship and innovation	Did this project result in or facilitate technology transfer?
	How did this project support and strengthen small businesses and sole proprietors?
	How did this project serve or encourage locally-owned businesses?
	Did this project facilitate research and development of new concepts or technologies?
Development quality	Did this project help shift development to Economic Center (EC) or Industrial Trade Area (ITA)?
	How did this project allow/result in commercial and/or residential growth in EC or ITA?
	How did this project reduce commercial sprawl along roadways?
	How did this project help preserve or rehabilitate our natural resources?

Level 4: On-going Activities and Local Capital Project Performance Measures

The 2003 Annual Report included, for the first time, an evaluation section effectively grading the activities of the prior year relative to the CEDS goals and objectives as established in the 2002 CEDS Five-year Plan. This five-year plan will continue to use this system to monitor on-going economic development programs, related planning activities, and local capital projects. Both quantitative and qualitative measures will be evaluated for each task or activity. The quantitative measures are meant to document levels of participation and effort in an activity and, where possible, the outcome or impact of the activity. Examples of quantitative measures include:

- The number of attendees at CEDS planning meetings
- The number of technical certifications awarded
- The number of affordable units added over the past year
- The number of research studies completed
- The amount of funding dedicated to specific target training areas

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

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

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

The status categories were established by the CEDS Contributors Group as part of the 2003 Annual Report process. The status of each activity will initially be determined by lead agencies and then reviewed by the larger CEDS Strategy Committee or its designated sub-committee.

- End-