



CAPE COD
COMMISSION

2024 Comprehensive Economic Development Strategy (CEDS)

YEAR 1 ANNUAL REPORT

APPROVED BY THE BARNSTABLE COUNTY ECONOMIC
DEVELOPMENT COUNCIL AND THE CAPE COD COMMISSION

JUNE 2025

Prepared by Cape Cod Commission Staff

Performance Progress Report

Grantee:	Barnstable County, Cape Cod Commission
Project Title:	Annual CEDs Performance Report
Project Number:	ED24PHI0G0497
CEDs Performance Year:	July 1, 2024 – June 30, 2025
Reporting period end date:	June 30, 2025
Report Prepared by:	Cape Cod Commission Staff
Five-year CEDs Time Period:	2024 – 2029

CEDs Annual Report 2025

YEAR ONE

The Comprehensive Economic Development Strategy (CEDs) for Cape Cod is the economic development blueprint for the region. It is consistent with the Cape Cod Commission’s Regional Policy Plan, which guides planning across the region. The CEDs document lays out a vision for the region, specific goals and objectives, and an action plan for achieving them. The following annual report outlines the region’s progress toward implementation of the most recent five-year plan completed in 2024.

Submitted to: US Department of Commerce Economic Development Administration

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Introduction

The 2024 – 2029 Cape Cod Comprehensive Economic Development Strategy (CEDs) is a tactical economic development plan consistent with the growth policy and goals of the Cape Cod Regional Policy Plan, which provides a vision of the future for Cape Cod and a framework for collaborative action. The CEDs includes a comprehensive summary of the region's economy, a five-year action plan, and a framework for evaluating progress on plan implementation.

The 2024 – 2029 CEDs was approved by the US Economic Development Administration (EDA) on August 6, 2024 and can be accessed here: <https://www.capecodcommission.org/our-work/ceds>.

This CEDs Annual Report accounts for activities conducted during Year 1 of CEDs implementation (July 1, 2024 – June 30, 2025). It addresses adjustments to the CEDs strategy, summarizes recent economic development activities, leverages metrics to evaluate CEDs progress, and outlines next steps for the year ahead.

Adjustment to the Strategy

The Cape Cod Commission (Commission) and CEDs Strategy Committee remain committed to the economic vision for Cape Cod articulated in the 2024 CEDs: "A strong and vibrant Cape Cod. A region that supports a resilient, inclusive, and diverse year-round community with access to housing options, high quality business, education, and employment opportunities, and thriving natural resources, building upon the historic and unique characteristics that have drawn people to the region for centuries."

The Barnstable County Economic Development Council (BCEDC) serves as the CEDs Strategy Committee. The BCEDC members are:

- Rosalin Acosta, Managing Director, Ernst & Young LLP
- Greg Bilezikian, Executive Director, Bilezikian Family Foundation
- Rob Brennan, President, CapeBuilt Homes (resigned December 2024)
- Amanda Converse, Economic Development Coordinator, Town of Orleans
- Kara Galvin, Executive Director, Cape and Islands Workforce Board
- Cindy Horgan, Executive Director, Cape Cod Children's Place
- Tammi Jacobsen, Director of Workforce Development & Training, Cape Cod Community College
- Alisa Magnotta, Executive Director, Housing Assistance Corporation
- Christin Marshall, Executive Director, Entrepreneurship for All (EforAll) Cape Cod (joined May 2025)



2024 COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS) YEAR 1 ANNUAL REPORT

- Wendy Northcross, Executive Director, John F. Kennedy Hyannis Museum Foundation, Inc. (resigned September 2024)
- Jack Stevenson, President, Mid-Cape Home Centers
- Robert "Bert" Talerman, Co-President, Cape Cod Five Cents Savings Bank
- Mark Forest, Commissioner, Barnstable County Commissioner
- Harold "Woody" Mitchell, Chair, Cape Cod Commission
- John Ohman, Representative, Barnstable County Assembly of Delegates

Report on Economic Development Activities

Throughout the CEDS planning and development process, key actions surfaced to advance the region’s economic vision over the next five years and beyond. Many of the actions advance not only one but multiple CEDS goals. While implementation of the key actions will take numerous actors from throughout the region, there are several key actions the Cape Cod Commission is responsible for advancing. Below is a summary of the Cape Cod Commission Year 1 Action Plan – those activities the Cape Cod Commission committed to advance during the first year of the 2024 CEDS.

CAPE COD COMMISSION YEAR 1 ACTION PLAN

Proposed Year 1 Activities



BCEDC Support & Administration

Proposed Year 1 Activities

Commission staff will continue to provide administrative support to the BCEDC and work with them to implement the CEDS, track progress, and adapt and adjust the approach to implementation as needed, including providing annual updates with action plans for subsequent years.

Accomplished in Year 1

The Commission provided administrative and technical support to the BCEDC and continued to work with them to implement the CEDs, track progress, and adapt and adjust the approach to implementation as needed. The BCEDC met seven times during the reporting period on: 9/11/2024, 11/13/2024, 12/11/2024, 1/15/2025, 2/12/2025, 4/9/2025, and 5/14/2025. The grants committee met twice on 12/18/2024 and 1/10/2025. The nominating committee met once on 4/9/2025.

During Year 1, the BCEDC continued their work in supporting economic development in the region. The BCEDC recommended and the Barnstable County Commissioners subsequently awarded funding to eight local organizations through the Cape Cod License Plate Grant Program for a total of \$300,000. The program supports projects that align with key actions outlined in the CEDs, supporting a diverse range of activities in support of regional CEDs goals related to housing attainability, community, infrastructure, natural resources, workforce development, and economic diversity and resiliency. Funded initiatives are listed below.

MAJOR GRANT RECIPIENTS

■ **Association to Preserve Cape Cod**

\$70,000 – Native Plant Growers Cooperative of Cape Cod

To support the Native Plant Growers Cooperative of Cape Cod to ensure demand for native plants is met by local growers and help to support preservation of farmland on Cape Cod.

■ **Housing Assistance Corporation**

\$70,000 – Rent 365

A program designed to increase year-round rental opportunities on Cape Cod by offering landlord education and increased incentives to encourage units to be rented year-round, including a small incentive to offset real estate tax for the landlords who participate for years two and three.

■ **Mashpee Wampanoag Tribe**

\$70,000 – Broadband Expansion Project

To expand broadband infrastructure and support the Tribe's efforts to become a sustainable internet service provider. The project aims to deliver fast, reliable, and affordable internet to non-tribal homes and businesses in alignment with the Tribe's commitment to community connectivity.

■ **Cape Cod Children's Place**

\$20,000 – Wellspring Project

To support the Wellspring project, which equips professionals with skills and evidence-based tools to address the complex needs of children and families, promoting a sustainable year-round workforce.

MICRO GRANT RECIPIENTS

■ Arts Foundation of Cape Cod

\$15,000 – Creative Exchange

To support the Creative Exchange Program, a personal and professional development program for all who work in the arts sector on the Cape and the Islands.

■ Cape Cod Community College

\$25,000 – Equity Leaders Program

To support the Equity Leaders: Building Inclusive Workplaces on Cape Cod program, which will offer sector-specific Diversity, Equity, Inclusion, and Social Justice (DEISJ) and Diversity, Equity, Inclusion, and Belonging (DEIB) training.

■ Entrepreneurship for All

\$15,000 – Business Accelerator Program

To support EforAll's 2025 Spring and Fall business accelerators, which provide aspiring entrepreneurs with business education, dedicated mentorship, and cash prizes to turn their ideas into local ventures.

■ Love Live Local

\$15,000 – Retail Incubator & Boost Your Brand Workshops

To support the Retail Incubator and Boost Your Brand Programs, which provide affordable retail space, support, and training to entrepreneurs and small businesses, especially women-owned and BIPOC-owned businesses.

These projects will continue to be supported by the grants into Year 2 of the CEDs reporting timeline.

Also in Year 1, the Commission hosted the 2024 OneCape Summit, September 18 and 19 in Harwich, MA. The summit featured presentations and conversations on the intersection between Cape Cod's environment and economy. Over 400 people attended the conference with more than 160 businesses or organizations represented.

The OneCape Summit schedule and details are available here:

<https://onecape.capecodcommission.org/2024-onecape-summit/>.

Staff continued to update and add to the Data Cape Cod website providing access to the most current datasets supporting regional planning efforts and economic development. Data Cape Cod is available here: <https://datacapecod.org/>.

Staff also continued to provide routine presentations on the regional economy and technical assistance to regional partners.

Zoning Changes

Proposed Year 1 Activities

Commission staff will provide technical assistance to towns to implement local zoning recommendations from the 2024 Cape Cod Regional Housing Strategy. Commission staff will also contract with a consultant to develop housing plans communities can use as pre-reviewed or pre-approved plans to help simplify housing development.

Accomplished in Year 1

Through the development of the CEDS and the Regional Housing Strategy, stakeholders clearly articulated the challenges associated with building more diverse, affordable, and attainable housing options. Zoning throughout the region is very restrictive, with multi-family housing development not allowed to be built by right in most areas. To facilitate the creation of greater diversity of housing options, the process for developing (or redeveloping) housing in appropriate locations should be simplified.

During Year 1, Cape Cod Commission staff continued to assist towns in developing zoning to provide greater housing diversity and choices. In particular, Commission staff worked with the Town of Eastham to develop revised zoning for North Eastham, incorporating elements of one of the model bylaws developed as part of the Regional Housing Strategy focused on form-based code.

Also during Year 1, Commission staff contracted with a consulting team to create model plans for certain small-scale housing types that could be pre-reviewed or pre-approved at the local level. Pre-approved building plans comply with building codes and local standards, requiring a limited administrative review to permit. This can expedite the building process and reduce costs like permitting fees, while the pre-approved nature of the plans can ensure context-sensitive building forms, fostering more predictable outcomes for both the developer and the community. The plans can also serve as models for the types of housing a community would like to encourage. As part of this work, model zoning amendments and recommendations were also included to increase the viability of building homes with the plans.

Commission staff also commenced working with the Town of Sandwich to draft new zoning for a key growth center in their town, the focus of which is to allow the development of different types of housing. This work will incorporate elements of the model bylaws created as part of the Regional Housing Strategy and will also work to integrate the pre-approved plans work.

Local Climate Action Plans

Proposed Year 1 Activities

Commission staff will provide technical assistance to towns to develop local climate action plans.

Accomplished in Year 1

With state grant funding, the Commission completed a suite of model bylaws and regulations to help communities better manage development in the floodplain. The "Model Coastal Resiliency Bylaw," "Model Coastal Resiliency Wetlands Regulations," and "Model Floodplain Overlay District Zoning Bylaw – Optional Higher Standards" are complementary tools that can be customized to address the community's preferences for managing new and redevelopment in the floodplain. Over the last 10 months Commission staff have participated in meetings with representatives from the towns of Falmouth, Mashpee, Dennis, and Eastham, as well as the Pleasant Bay Alliance (PBA), a coalition of the towns of Chatham, Orleans, Brewster, and Harwich, to discuss the path for adopting these regulations. Commission staff partnered with the PBA and others on a grant proposal to support adoption of these regulations within the PBA towns (if awarded, grant work would extend through 2027).

Commission staff have also worked with Cape Cod municipal DPW directors to identify and prioritize vulnerable low-lying road segments to address through the Transportation Improvement Plan (TIP), and identify other funding sources. Reducing vulnerability of low-lying roads to flooding is a priority of many of the towns' coastal resilience and climate action committees, and they have been working locally to advance design. The Town of Yarmouth engaged a consultant to advance the work of the Commission's Low Lying Roads project looking at vulnerable neighborhoods through the Route 28 Corridor Resiliency Plan, with a planned completion date of June 2026.

In the fall of 2024, the Cape Cod Commission commenced a partnership with the Town of Eastham and the Eastham Energy and Climate Action Committee to facilitate the development of a municipal climate action plan. The Eastham Climate Action Plan will serve as a vital tool for the Town and its residents, guiding local actions, priorities, and investments. The plan will build on ongoing local efforts, including hazard mitigation planning, participation in the state's Municipal Vulnerability Preparedness Program, involvement in the Cape Cod Commission's Low-Lying Roads project, Eastham's Greenhouse Gas Emissions Inventory, and a climate survey of Eastham residents and businesses. Through a robust community engagement and data collection process, the plan will create a comprehensive roadmap for addressing climate change at the local level by outlining realistic, cost-effective goals that align with regional, state, and national frameworks, while prioritizing equity by minimizing burdens on environmental justice and socially vulnerable populations. The planning team kicked off the process with municipal and community partners in January 2025, having reviewed existing relevant plans and data. Key activities through June 2025 include: municipal interviews and data collection, focus groups with key populations, community pop-ups, community leader interviews, broad public outreach, and community workshop development.

Wastewater Infrastructure

Proposed Year 1 Activities

To ensure the Cape Cod and Islands Water Protection Fund continues to provide substantial subsidies to local water quality and wastewater projects, the Commission will continue to provide administrative and technical support to the Management Board. This will include maintaining an up-to-date understanding of anticipated local expenditures on wastewater projects across the region over the next five years.

Accomplished in Year 1

With its establishment by the Massachusetts Legislature in 2018, the Cape Cod and Islands Water Protection Fund (CCIWPF) provides a mechanism for towns to access additional funding to support municipal wastewater treatment and water quality projects. The CCIWPF is a dedicated fund within the state's Clean Water Trust set up to solely benefit communities on Cape Cod, Martha's Vineyard, and Nantucket. Its source of revenue is a 2.75% excise tax on traditional lodging and short-term rentals. The fund is administered by the Massachusetts Clean Water Trust and overseen by a Management Board comprised of representation from every member town. The Cape Cod Commission provides administrative and technical assistance to the Board. Currently, the 15 Cape Cod communities are members of the fund.

The fund provides subsidies through the Clean Water State Revolving Fund (SRF) to towns financing wastewater and water quality projects that are listed on the annual Clean Water Intended Use Plan and to towns that have qualified wastewater-related debt that pre-dates the establishment of the fund. Projects in excess of \$1 million receive subsidies equal to 25% of the project costs. Projects of \$1 million or less receive 50% subsidies. These subsidies are in addition to financing through the Clean Water Trust.

During this year of CEDs implementation, the Management Board awarded over \$105M in subsidies to 10 Cape Cod towns, with additional subsidy to Provincetown for water pollution abatement work that pre-dated establishment of the Fund. In addition, the Management Board voted to continue funding on-going regional coastal water quality monitoring and to begin funding a freshwater monitoring program that previously received funds from other sources.

Bridges Economic Impact Analysis

Proposed Year 1 Activities

Commission staff will continue working with a consultant to finalize the economic impacts analysis on potential Canal bridge closures for the purposes of maintenance and rehabilitation. This information will be leveraged to communicate the need to replace the bridges. The Commission will continue to support investments for the purposes of constructing new canal bridges and engage in

providing feedback on design and proactive efforts to mitigate construction and maintenance impacts, as necessary and appropriate.

Accomplished in Year 1

The Cape Cod Commission completed an economic impacts analysis of potential closures of the Canal bridges for maintenance and/or major rehabilitation. This analysis was presented in a variety of forums to share the results, which highlight the importance of timely replacement of the Canal Bridges. The Commission continued to be an active participant of the Canal Bridges Advisory group advocating for multi-modal thinking and elements of the project that will benefit the region. Commission staff also collected and shared multimodal bridge data to inform decision-making on design elements. Commission staff continued to identify and advocate for designs and complementary projects that will improve multimodal accommodation both in the Cape Cod Canal area and across the region in a variety of forums.

Incentivizing Year-Round Housing

Proposed Year 1 Activities

To understand the most effective strategies to incentivize year-round housing, the Commission will work to initiate a comprehensive analysis of short-term rentals on Cape Cod, including a town-by-town analysis. This will advance the action plan and housing goal of this CEDs as well as the Regional Housing Strategy.

Accomplished in Year 1

Commission staff issued a Request for Proposals for a consultant to carry out a comprehensive study that provides an understanding of the existing landscape of short-term rentals in the region, how they impact year-round housing, and what programs or incentives would be effective in converting short-term rentals to year-round housing, as well as preserving existing year-round housing. The study will look at mechanisms such as year-round occupancy deed restrictions, tax incentives, and short-term to long-term rental programs, and others identified through research, and develop recommendations for programs for the region. The Commission contracted with Outwith Studio and initiated work on the study in Year 1 of the 2024 CEDs. Program research is underway.

Broadband Needs Assessment

Proposed Year 1 Activities

The Commission will complete the Regional Broadband Needs Assessment outlining recommendations to address broadband needs and opportunities for the region covering three categories: fiber and fixed broadband infrastructure, mobile network enhancements, and advancing

digital equity. Commission staff will release this report as a tool to be used by towns and continue to communicate and increase awareness of those recommendations.

Accomplished in Year 1

The Cape Cod Commission procured the support of a consultant to complete the Regional Fixed and Wireless Broadband Needs Assessment. This Assessment, and a summary prepared by Commission staff, was presented in a variety of forums to inform decision-makers. The Commission collaborated on the state's Broadband Equity, Access, and Deployment (BEAD) challenges process to identify unserved and underserved locations including submitting challenges for a number of community anchor institutions. The Commission also worked on a variety of related regional and local digital equity initiatives aimed at addressing barriers to broadband beyond infrastructure.

PARTNER ACTIONS

Below is a summary of some of the work done to advance CEDs actions during Year 1 of the 2024 CEDs by organizations other than the Cape Cod Commission.

Incentivize Year-round Housing

COMMUNITY DEVELOPMENT PARTNERSHIP

The Lower Cape Community Housing Partnership, which is a Community Development Partnership initiative, supports municipal officials and staff with resources and education around building support for affordable housing. A component of this, the Lower Cape Housing Institute (LCHI) will have hosted five workshops and four quarterly peer groups by the end of the fiscal year. As of April 17, 2025, 134 unique participants attended sessions, with 289 total attendees, and 47 more individuals have registered to access recordings and materials.

HOUSING ASSISTANCE CORPORATION

The Housing Assistance Corporation (HAC) continued to administer the Rent 365 Incentive Program. This program, which provides incentives to landlords to convert their property from a seasonal to a year-round rental, is currently in its third iteration since 2018. The program continued in 2024 with a \$30,000 grant from Cape Associates. HAC is also a grant recipient of a License Plate Fund Grant to expand the Rent 365 program further.

As of March 2025, Rent 365 features cash incentives of \$4,000 for a 1-bedroom unit, \$5,000 for a 2-bedroom unit, and \$6,000 for units with 3 bedrooms or more, as well as \$10,000 for an ADU (accessory dwelling unit). The disbursement of these funds is over a two-year period (three-year period for ADUs) to further encourage the rental units remain part of the Cape's year-round inventory. A \$500 lease renewal bonus has been added to the program for those landlords who continue to lease their property on a year-round basis in Year 3 to help offset property tax and

insurance burdens. During Year 1 of the CEDS, six new landlords have participated in the program from the towns of Dennis, Eastham, Harwich, Hyannis and Truro. Two applications are currently pending approval.

Provide Opportunities for Organizations and Entrepreneurs to Pilot Ideas

AMPLIFY POC CAPE COD

Amplify POC Cape Cod (Amplify) supported over 100 BIPOC entrepreneurs through educational programming, technical assistance, vendor opportunities, and grant support between July 1, 2024 and March 31, 2025. Amplify's Fall 2024 workshops served 62 participants, and Spring 2025 community workshops reached 147 attendees. In addition, their vendor markets engaged nearly 120 vendors in total and drew thousands of attendees, providing essential visibility and income for small businesses. Amplify awarded five POC-owned businesses with \$5,000 each through their Equity Fund and provided student stipends to four BIPOC youth. Additional support included one-on-one consultations, business video features, and continued partnerships to increase access to financial resources and shared retail opportunities. Amplify also reports continued collaboration with local banks and financial institutions to provide technical assistance and improve access to capital.

COMMUNITY DEVELOPMENT PARTNERSHIP

The Community Development Partnership (CDP) provides workshops, technical assistance, and micro loans to all business owners who live or work on the Lower and Outer Cape. This includes businesses that are starting, stabilizing, and growing. For fiscal year 2025, CDP provided technical assistance to 109 small businesses and four workshop programs for a total of 176 participants. In addition, CDP provided \$97,000 in business financing to six small business owners. Four of the six businesses were startups and the other two have fewer than two full time employees.

CAPE COD CHAMBER OF COMMERCE AND CAPE COD BLUE ECONOMY FOUNDATION

In support of entrepreneurship, the Cape Cod Chamber of Commerce and Cape Cod Blue Economy Foundation launched a three-year Entrepreneur's Peer Group with 12 Cape Cod small business owners who work full time on their business, have been in business for 1 to 5 years, and grossed between \$30,000 and \$1,000,000 in at least one year of operation. The Cape Cod Chamber of Commerce also offers occasional programs such as Maximize Your Membership and Truly Boss where businesses learn how to take their business to the next phase.

ENTREPRENEURSHIP FOR ALL (EFORALL) CAPE COD

EforAll continued to host a free business accelerator program which provides technical assistance and support to local entrepreneurs. Each program participant attends 20+ classes and is paired with three dedicated mentors. There is also a contest to provide cash funding to the entrepreneurs to

invest in their start-ups. The total number of entrepreneurs served during the reporting period was 36 individuals representing 30 local ventures.

LOVE LIVE LOCAL

In the reporting time period, Love Live Local supported over 200 unique local entrepreneurs and small business owners through their [Love Local Fests](#), which connect makers, artists, and emerging brands with thousands of consumers while also offering promotional and business development support. In addition, the [Boost Your Brand](#) workshop, a program that provides technical assistance, brand refinement guidance, and mentorship for entrepreneurs, has 20 participants enrolled through 2025. Furthermore, Love Live Local's year-round retail incubator in Hyannis supports 62 local makers and artists, offering shelf space, marketing visibility, and educational signage that links directly to their online platforms.

Support Year-round Community Activity and Civic Engagement

COMMUNITY DEVELOPMENT PARTNERSHIP

Cape Cod Community Development Partnership (CDP) hosts a resident advocacy program, "Project 365" in four towns: Truro, Eastham, Harwich, and Orleans. Each cohort has a total of about twenty core leaders that meet monthly, follow town activities and meetings, and learn about topics relevant to the goals of the CEDs related to housing, civic engagement, and more. The program provides support for developing and maintaining grassroots groups in the communities that engage at the town level. CDP plans to continue building these resident groups in each of the eight lower Cape Cod towns.

Develop and Connect Students and Workforce to Educational and Training Opportunities

CAPE COD CHAMBER OF COMMERCE

The Cape Cod Chamber of Commerce conducted nine four-hour long leadership training workshops covering Influence: The Business of Getting Things Done, Learning Agility, Step Up to Conflict, and Feedback that Works. The Cape Cod Chamber of Commerce is also half-way through a two-year Cape Based Commercial Driver's License Training Program. To date 30 individuals have been enrolled and 27 will complete their training by May 2025.

MASSHIRE CAPE AND ISLANDS WORKFORCE BOARD

MassHire Cape and Islands Workforce Board (CIWB) continued to collaborate closely with vocational schools, comprehensive high schools, and Cape Cod Community College. These partnerships are designed to align curriculum with workforce needs and expand access to career connected learning opportunities. Through its Career Technical Initiative (CTI) grants the CIWB supports the

development of training pipelines in high demand occupations. The CIWB Connecting Activities Program connects high school students with internships, co-op experiences and mentoring.

In addition, CIWB continues to strengthen awareness and accessibility to training, upskilling, and career pathway opportunities for students, job seekers, and career changers through a suite of robust youth programs such as Connecting Activities, YouthWorks, ArtWorks, and the MassHire Cape and Islands Career Center. CIWB is also in their second of a three-year grant initiative aimed at building strong, sustainable career pathways within the priority healthcare sector. This effort directly supports workforce equity by promoting access to high-demand, well-paying careers regionally.

CAPE COD COMMUNITY COLLEGE

Cape Cod Community College (4Cs) continued or expanded several training programs for the region during this reporting period including in the Blue Economy, dental, funeral, business, nursing, marine technology and welding, and digital literacy. They also developed several new programs including an advanced manufacturing and automation degree program, municipal finance, event planning, and professional bar management certificates, hvac/ heat pump training, cna/home health aide programs, a health-related initiative through the Cape and Islands Area Health Education Center (AHEC) and a workforce reentry program in partnership with the Sheriff's Office. The Center for Community and Professional Education (CCAPE) at Cape Cod Community College also expanded programming in marine technology, welding, various safety-related trainings, home health aide certification, AHEC Health Scholars Program, medical interpreter training, formerly incarcerated reentry opportunities, and noncredit certified nursing assistance (CNS).

Some of the programs and training that the College offers also target key industries for the region such as construction, fishing, aquaculture, renewable energies, and the blue economy. For example, their science and engineering courses focus on environmental science, marine science, water quality, and Blue Economy-related workforce development. They also offered opportunities for the hospitality (degrees and certificates) and healthcare (medical billing, coding, and administrative certificates) sectors. The Center of Corporate and Professional Education (CCAPE), within 4C's, also offered developing marine apprenticeships and construction safety programs, HVAC/heat pump training, and community health worker training.

In 2024, the College also helped launch the Cape Cod Social and Economic Justice Institute (SEJI), an initiative dedicated to advancing economic opportunity and workforce equity through regional listening sessions, policy advocacy, and new program development targeting underrepresented and marginalized groups.

Identify and Support Growing Industries in the Region

CAPE COD BLUE ECONOMY FOUNDATION

The Cape Cod Blue Economy Foundation held WaterWORKS: Blue Economy and STEM Career Exploration Day on Tuesday, January 14, 2025. The event hosted 45 business and non-profit organizations, 300 high-school students, and 100 job seekers from the public.

CAPE COD CHAMBER OF COMMERCE

The Cape Cod Chamber of Commerce Housing Coordinator worked directly with J-1 visa holders and 50 large local employers to find adequate housing for visiting student workers.

Cape Cod Chamber of Commerce staff also aided in MassDevelopment's Transformative District Initiative in Hyannis administering facade improvement grants, community forums, networking, and technical assistance in the form of a digital phase-based business development toolkit.

Advance Climate Change Resilience

CAPE LIGHT COMPACT

Cape Light Compact continued to administer energy efficiency programs and has worked to expand program offerings over the course of 2024 in conjunction with other energy efficiency program administrators across the Commonwealth. In addition, Cape Light Compact recently completed its strategic electrification and energy optimization demonstration project that supported low and moderate-income customers to: (1) convert their oil, propane or electric resistance heat to cold climate air source heat pumps; and (2) install solar photovoltaic systems to support electrification of their heating systems. The majority of the participants had installations by the end of 2024.

The Compact also received several grants during the reporting period including: \$241,157 to administer the second phase of its electric bike rebate program for income-eligible residents on Cape Cod and Marthas Vineyard and received a \$4.9 million loan from the United States Department of Agriculture's Rural Utility Services Rural Energy Savings Program for a low-interest loan program to year-round Cape Cod and Martha's Vineyard residential customers for new solar PV projects.

Evaluation of Progress on Action Plan & Goals

Evaluation of progress on the CEDs involves three types of metrics or indicators: macro level, programmatic, and qualitative. Macro level indicators are high-level data that is collected regularly. Macro indicators may not change significantly in short amounts of time (e.g., one year) but they are important in understanding the region generally and its trends. Programmatic indicators are related directly to the implementation and administration of efforts and initiatives that are important to the

CEDs (e.g., completing an analysis or convening stakeholders). Qualitative indicators include contextual information about progress on key initiatives of the CEDs. Updates in the previous section, Report on Economic Development Activities, are qualitative indicators.

The following macro and programmatic indicators will help illustrate the region’s progress toward achieving its economic vision and goals and where new or expanded planning and action may be needed.

MACRO INDICATORS

The following table includes the latest data related to the Macro Indicators outlined in the CEDs and indicative of the progress towards CEDs implementation. Latest available data are used; for some metrics that is 2023 data, whereas for others it is 2024. In some cases, the amount of change in data may be within the margin of error between the two years, however over the course of five years, trends should become apparent.

Year-round Population			
	2022	2023	Change
Total Population	232,457	231,735	-.3%
<i>Source: American Community Survey 1-year Estimates for Barnstable County, Table DP05</i>			
Age and Racial Diversity			
	2022	2023	Change
Median Age (Years)	55.7	56.3	.6 years
Age 65 & Older	33.7%	34.3%	-1.8%
Under 18 Years Old	13.9%	13.6%	-2.2%
<i>Race</i>			
White	86.0%	86.8%	0.9%
Black or African American	2.4%	2.4%	0.0%
American Indian and Alaska Native	0.4%	1.0%	150.0%
Asian	1.3%	1.7%	30.8%
Native Hawaiian and Other Pacific Islander	0.0%	0.0%	0.0%
Some other race	1.7%	1.0%	-41.2%
Two or more races	8.30%	7.10%	-14.5%
<i>Source: American Community Survey 1-year Estimates for Barnstable County, Table DP05</i>			
Percentage of Housing Units Used Seasonally			
	2022	2023	Change
	31.6%	31.1%	-1.6%
<i>Source: American Community Survey 1-year Estimates for Barnstable County, Tables B25004 and DP04</i>			

Median Homes Sales Price (for both Single-Family Homes and Condos)				
	2023	2024	Change	
	\$679,250	\$715,000	5.3%	
<i>Source: Cape Cod and Islands Association of Realtors, 2024 Annual Report on the Cape Cod Housing Market</i>				
Housing Inventory				
	2023	2024	Change	
Single-family Homes	40	37	-7.5%	
Condominiums	62	55	-11.3%	
<i>Source: Cape Cod and Islands Association of Realtors, December 2024 Market Activity Report for Barnstable County</i>				
Housing Affordability Income Threshold				
	2022	2023	Change	
Income needed to afford a median priced home	\$210,000	\$230,000	9.5%	
<i>Source: Cape Cod Regional Housing Needs Assessment (2022), CCC Calculations (2023). Affordably purchase means a household spends 30% or less of income on housing costs. Values have been rounded.</i>				
Percent of Housing Stock That is Detached Single-Family Homes				
	2022	2023	Change	
	82.5%	80.4%	-2.5%	
<i>Source: American Community Survey 1-year Estimates for Barnstable County, Table DP04</i>				
Number of Units on the State's Subsidized Housing Inventory				
January 2025	7,105			
<i>Source: MA Executive Office of Housing and Livable Communities</i>				
Labor Force Participation Rate				
Population 16 Years and Older	2022	2023	Change	
Barnstable County	58.7%	57.9%	-1.4%	
Massachusetts	66.8%	67.2%	0.6%	
<i>Source: American Community Survey 1-year Estimates for Barnstable County, Table DP03</i>				
Unemployment Rates				
	January 2024	July 2024	Difference	
Barnstable County	6.8%	4.1%	-2.7%	
Massachusetts	4.2%	4.5%	0.3%	
<i>Source: MA Department Of Economic Research, Unemployment Rates in Massachusetts</i>				
Top 10 Industries by Year Over Year Growth in Employment				
Average Monthly Employment	2022 Average Monthly Employment	2023 Average Monthly Employment	Nominal Change	Percent Change
Utilities	416	565	149	35.8%



2024 COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDs)
YEAR 1 ANNUAL REPORT

Management of Companies and Enterprises	470	527	57	12.1%
Transportation and Warehousing	2,584	2,688	104	4.0%
Construction	7,613	7,833	220	2.9%
Public Administration	5,219	5,366	147	2.8%
Finance and Insurance	2,139	2,183	44	2.1%
Other Services, Except Public Administration	3,646	3,720	74	2.0%
Educational Services	7,217	7,337	120	1.7%
Accommodation and Food Services	15,533	15,759	226	1.5%
Health Care and Social Assistance	14,806	14,982	176	1.2%

Source: MA Department of Economic Research, Employment and Wages Report ([ES-202](#)), 2022 and 2023

Industry Mix for Top 10 Industries by Percent of Average Employment

Percent of Total Average Monthly Employment	2022	2023	Percent Change
Accommodation & Food Services	16.4%	16.4%	0.0%
Healthcare & Social Assistance	15.6%	15.6%	0.0%
Retail Trade	15.6%	15.4%	-0.9%
Construction	8.0%	8.2%	1.6%
Educational Services	7.6%	7.6%	0.4%

Median Household Income

	2022	2023	Change
Median Household Income	\$91,438	\$89,893	-1.7%

Source: American Community Survey 1-year Estimates for Barnstable County, 1-Year Estimates, [Table S1901](#)

Average Annual Wages for Top 5 Industries by Employment

	2022	2023	Change
All Industries	\$60,060	\$62,140	3.5%
Accommodation and Food Services	\$37,544	\$38,584	2.8%
Health Care and Social Assistance	\$68,276	\$70,460	3.2%
Retail Trade	\$43,992	\$44,512	1.2%
Construction	\$73,372	\$77,896	6.2%
Educational Services	\$62,556	\$64,480	3.1%

Source: MA Department of Economic Research, Employment and Wages Report ([ES-202](#)), 2022 and 2023

Many of these indicators are available on the Cape Cod Commission's [Data Cape Cod](#) website, which provides interactive dashboards with economic and demographic data for the region, from varying sources. The dashboards often provide information at the town and county level, allowing users to access data at the scale most relevant for their needs. As the CEDs is implemented and continues to

evolve, so too will Data Cape Cod. The website will continue to make information easily accessible to stakeholders throughout the region as they pursue planning and projects.

PROGRAMMATIC INDICATORS

- Changes in zoning to allow for more housing opportunities: *7 towns changed their zoning to allow for more housing opportunities during this reporting period (Dennis, Eastham, Harwich, Mashpee, Provincetown, Sandwich, Truro)*
- Entrepreneurs served by support programs: *More than 800 served by programs by the Community Development Partnership, Cape Cod Chamber of Commerce, AmplifyPOC, and Love Live Local*
- Number of people completing training programs: *126 participants in programs led by the Cape Cod Chamber of Commerce*
- Number of climate resiliency projects: *Cape Light Compact administered its Energy Efficiency Program, Strategic Electrification and Energy Optimization Demonstration Project, Bike Rebate Program for Income Eligible Residents of Cape Cod, and Low-Interest Loan Program for New Solar PV Projects*
- Number of local climate action plans: *1 in process (Town of Eastham)*
- Publicly accessible EV charging stations: *251*
- Investment in wastewater infrastructure projects: *\$421,990,000 in projects listed on the 2025 Clean Water Intended Use Plan (Cape Cod and Islands Water Protection Fund Subsidy Total: \$105,497,500)*
- Number of pond remediation and restoration projects: *5 (including two in Harwich at Skinequit Pond and Hinckley's Pond, one at Long Pond in Barnstable, and two in Orleans at Crystal Lake and Pilgrim Lake)*
- Acres of land preserved for open space: *92,359 acres*
- Locations served by broadband: *99.7%*

Locations Served by Broadband	
Number of Locations (Residential and Commercial)	Percentage Served
145,529	99.7%
3,822	2.6%
11,859	8.1%
26,978	18.5%

918	0.6%
<i>Source: FCC Provider Broadband Data, June 2024 (latest available)</i>	

- Locations served by more than one broadband provider: *100% including satellite; 24.4% excluding satellite*
- Funding secured for the canal bridges: *\$2,415,000,000*

Schedule of Goals for the Next Year

CAPE COD COMMISSION YEAR 2 ACTION PLAN

This next year will be Year 2 of the 2024 Cape Cod CEDs. In Year 2 of implementation of the new CEDs, the Cape Cod Commission will continue to advance:

- **Administration and General Planning:** Activities will include continuing to provide administrative support for the BCEDC, providing technical support related to CEDs objectives, and pursuing funding in support of CEDs Action Plan implementation.
- **Outreach and Information Sharing:** Outreach efforts to regional stakeholders will continue to include data collection, analysis, and visualization; the development and dissemination of research and planning reports; and presentations on a range of economic and community development issues.
- **Targeted Technical Assistance:** Commission staff will continue to offer assistance to towns, non-profits, and other regional partners, as well as support for LCP development, and project-based research and data analysis.

The Commission will also focus on advancing the following CEDs actions.

- **Incentivize Year-Round Housing:** The Commission will continue working with a consulting team developing a strategy for establishing a program or programs to incentivize year-round occupancy of housing units. The study will provide an understanding of the existing landscape of short-term rentals in each town, impacts on town budgets and revenues, impacts on the year-round housing market, and the efficacy and cost-effectiveness of different types of incentive programs or tools relative to developing or redeveloping new housing. The study will also aim to identify what level of incentives would be likely to foster participation in programs that convert short-term rentals to long-term housing. This study will lay the groundwork for understanding what types of programs would be most effective in incentivizing year-round housing in the different communities in the region.

- **Simplify Appropriate Housing Development:** Commission staff will work with local municipalities to develop and adopt new zoning that will allow for different types of housing through simpler permitting process, including through encouraging adoption of pre-approved plans.
- **Invest in Water Quality and Wastewater Infrastructure:** To ensure the Cape Cod and Islands Water Protection Fund continues to provide substantial subsidies to local water quality and wastewater projects, the Commission will continue to provide administrative and technical support to the Management Board. This will include maintaining an up-to-date understanding of anticipated local expenditures on wastewater projects across the region over the next five years. Commission will also work with the Management Board, regional, and state partners to encourage capitalization of the Clean Water State Revolving Fund.
- **Invest in Broadband Infrastructure:** Commission staff will continue to support organizations and agencies looking to implement recommendations from the Regional Broadband Needs Assessment. Staff will also continue to monitor opportunities for broadband infrastructure investment and internet access and adoption initiatives.
- **Advocate for Replacement of the Canal Bridges:** Commission staff will continue to participate in the Canal Bridges Advisory Group, provide updates and information to regional and local entities looking to engage in the Canal Bridges conversations, and maintain information on the consequences of inaction. The Commission will also initiate conversations about traffic management activities that may be needed to address any potential travel disruptions and impacts on business during construction activities.
- **Support Growing Industries:** The Cape Cod Commission and Cape Cod Chamber of Commerce will work together to conduct an analysis to determine which industries in the region have been growing over the last 5-10 years, and which assets and opportunities exist on Cape Cod for new industries. The analysis will help provide guidance for anticipated staffing and business needs for new and innovative industries and their evolution.
- **Advancing Resilience:**
 - **Adopting Floodplain Regulations:** Commission staff will work with municipalities, Barnstable County Cooperative Extension staff, and other partners to use model flood regulations to build support for and customize local regulations to take to town meeting for local adoption to improve coastal resiliency.
 - **Tax Assessment:** Commission staff will work with a consultant to understand the geographic location of tax assets of Cape Cod communities and identify those areas

that are particularly vulnerable to natural disasters and how such disasters or destruction of those properties could impact the region's tax base.

- **Local Resilience Plans:** Commission staff will continue working with the Town of Eastham to develop resilience plans for the town.
- **Advancing Low-Lying Roads Projects:** Commission staff will continue to collaborate with towns to prioritize, advance designs, and identify funding to remediate vulnerable low-lying roads.

INITIATIVES ANTICIPATED TO BE ADVANCED BY OTHER ORGANIZATIONS IN YEAR 2

PROVIDE OPPORTUNITIES FOR ORGANIZATIONS AND ENTREPRENEURS TO PILOT IDEAS

- **AmplifyPOC** aims to expand their business and homeownership workshops and programs, continue advocacy and DEI initiatives, and work toward establishing shared co-working and incubation space for BIPOC entrepreneurs. They also plan to continue ongoing partnerships with organizations like Cape Cod Community College, WE CAN, HAC, The Arts & Justice Collective, the Cordial Eye, and the Cape Cod Commission.
- **Community Development Partnership** will have staff participating in the Northeast Transition Initiative (NETI) Fellowship where they will be gaining experience and knowledge around exit planning strategies for business owners, including worker coops. They also plan to offer trainings and technical assistance in the coming year related to Exit Planning. This will provide opportunities for new entrepreneurs as exiting business owners think about their options for selling their businesses.
- **Love Live Local** plans to launch a new online directory and search tool to effectively connect consumers with local businesses. In addition, they plan to introduce the Love Local Card, a perk program that rewards consumers for shopping local, expand the retail incubator program to provide more piloting opportunities for small brands, and seek continued funding for their Local Business Boost Grant Program.

DEVELOP AND CONNECT STUDENTS AND WORKFORCE TO EDUCATIONAL AND TRAINING OPPORTUNITIES

- **Cape Cod Community College** intends to offer more programs targeted at key regional industries such as planning to launch a new Shellfish Constable Program.
- The **Cape Cod Chamber of Commerce** will add four new course types to the Leadership Series. New courses will launch in Fall 2025. In addition, the Chamber will continue the Cape

Based CDL Training Program by enrolling another 30 trainees in September 2025. WaterWORKS 2026 will expand to include 400 high-school students and 200 members of the public. The **Cape Cod Blue Economy Foundation** will partner with Cape Cod Community College to launch the Blue Economy Forum for Employers in October 2025. The Forum will take place twice per year as a blue economy industry employer listening session, promote relevant training available in the region, and lead attendees through a sample workshop.

SUPPORT YEAR-ROUND COMMUNITY ACTIVITY AND CIVIC ENGAGEMENT:

- **Community Development Partnership** plans to continue to recruit and support the creation of resident cohorts in each of the eight Lower and Outer Cape towns through its Project 365 program, which helps support creation and maintenance of grassroots initiatives.

CAPE COD COMMISSION

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