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# Cape Cod Comprehensive Economic Development Strategy (CEDS) **2012 Annual Report**

June 30, 2012



Submitted To:  
US Department of Commerce Economic Development Administration

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

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## Forward

This is the third annual report on progress towards implementation of the Comprehensive Economic Development Strategy (CEDS) for the Cape Cod region. It was prepared in 2012 in accordance with US Economic Development Administration (EDA) guidelines and submitted to the EDA on June 30, 2012. The foreword outlines EDA's mission, investment policy, and expectations regarding the CEDS document, planning process, and implementation.

### THE ECONOMIC DEVELOPMENT ADMINISTRATION (EDA)

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

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

1. *Be market-based and results-driven.* An investment will capitalize on a region's competitive strengths and will positively move a regional economic indicator measured on EDA's Balanced Scorecard, such as an increased number of higher-skill, higher-wage jobs; increased tax revenue; or increased private-sector investment.
2. *Have strong organizational leadership.* An investment will have strong leadership, relevant project management experience, and a significant commitment of human-resources talent to ensure a project's successful execution.



3. *Advance productivity, innovation, and entrepreneurship.* An investment will embrace the principles of entrepreneurship; enhance regional industry clusters; and leverage and link technology innovators and local universities to the private sector to create the conditions for greater productivity, innovation, and job creation.
4. *Look beyond the immediate economic horizon, anticipate economic changes, and diversify the local and regional economy.* An investment will be part of an overarching, long-term comprehensive economic development strategy that enhances a region's success in achieving a rising standard of living by supporting existing industry clusters, developing emerging new clusters, or attracting new regional economic drivers.
5. *Demonstrate a high degree of commitment by exhibiting:*
  - a. High levels of local-government or nonprofit matching funds and private-sector leverage
  - b. Clear and unified leadership and support by local elected officials
  - c. Strong cooperation between the business sector, relevant regional partners, and local, state, and federal governments

## THE COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS)

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

### THE CEDS PLANNING PROCESS

Regional Planning Authorities (RPAs) across the country are responsible for developing and implementing a CEDS for their region. The RPA for



Barnstable County is the Cape Cod Commission. The CEDS process begins with the selection of a “CEDS Strategy Committee.” The committee is responsible for convening the planning process and overseeing implementation of the plan. The committee must be representative of the economic development community within the region including business, industry, government, service and non-profit organizations, minority populations, and training and educational entities.

#### THE CEDS DOCUMENT

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

1. CEDS Planning Process: A description of the planning process
2. CEDS Context: An analysis of the regional economy using available data and 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 and Performance Measures: An outline of the plan’s implementation and a method for measuring progress on specific priority projects and towards meeting the CEDS goals overall

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



## Executive Summary

The Barnstable County Comprehensive Economic Development Strategy (CEDS) has been in effect for three years; this annual report highlights the accomplishments made in Year 3 (2011-2012) and outlines the action plan for Year 4 (2012-2013).

The CEDS has invigorated regional collaboration around economic development on Cape Cod. It has helped bring about new partnerships and programs. The many organizations that touch on economic development are moving in a unified direction with shared goals and clear responsibilities. This alone is evidence of the success of the CEDS process.

The CEDS document has been used effectively by a number of stakeholders in requesting funding for regional priority projects identified in the document – another indicator of success. The CEDS continues to be much more than simply a document sitting on a dusty shelf.

### SUMMARY BY CHAPTER

#### CEDS STRUCTURE AND PROCESS

Chapter 1 outlines the planning structure and the approach taken to develop both the five-year plan and the annual report. Implementation of the CEDS has been driven by the CEDS Strategy Committee, known as the Cape Cod Economic Development Council, for both guidance and funding. They continue to invest \$350,000 per year toward the implementation of the priority projects, data dissemination efforts, and targeted technical assistance to towns. The Cape Cod Commission has staffed this effort under the leadership of Executive Director Paul Niedzwiecki and Chief Economic Development Officer Leslie Richardson.

The evaluation this year was informed by the second SmarterCape Summit which focused on the importance of the OpenCape middle-mile broadband network to the other CEDS priority projects and regional economic development in general. Sessions at the summit focused on



different project topic areas or themes and how they might be approached differently or more comprehensively with the advent of improved telecommunications infrastructure on Cape Cod. In addition to the summit, priority project teams provided progress reports and stakeholders gathered to categorize and prioritize the regional projects.

#### CEDS VISION

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

#### CEDS CONTEXT

Chapter 3 focuses on understanding the regional economy of Barnstable County. The chapter uses the most recent data available, including the 2010 Census, to describe the regional economy. The chapter covers potential areas of distress and evaluates current conditions based on a series of benchmarks and town specific data tables.

The most notable trend is the almost 3% decline in population over the past decade and the 9% increase in housing units over the same period. The loss in population was among the white population while more people of other races moved to the Cape. Also notable, but not new, is the continued lag in wages on Cape Cod relative to both the state and the US.

#### CEDS ACTION PLAN

Chapter 4 focuses on the CEDS action plan for Year 3 and the proposed action plan for Year 4. The summary table for the Year 3 action plan indicates what action steps have been taken, and includes any clarifying comments on the work completed. A similar looking table for Year 4 outlines the tasks that the Cape Cod Commission, in partnership with CEDS stakeholders, plans to complete over the coming year. This includes a schedule of when different activities are expected to occur and lists who is responsible for ensuring the work is completed. The final section in this chapter looks at process and outcome measures of success relative to implementation of the action plan.



## CEDS PRIORITY PROJECTS

**Accomplishments:** First among the many implementation highlights is the development of the OpenCape broadband network. This infrastructure, like railroads and highways before it, will have an enormous impact on the region's economy. Without this infrastructure Cape Cod would not be competitive as a place to live, work, or even play. To celebrate this success and look at the ways we need to take advantage of the OpenCape project, the region hosted its second SmarterCape Summit this spring. The summit looked at many of the regional priority projects and their implementation in light of this new telecommunications infrastructure.

Commission staff completed the Regional Financing Authority feasibility study and presented it to the CEDS work group focused on business climate for their approval. The Barnstable County Commissioners officially established the Strategic Information Office and appointed the Executive Director of the Cape Cod Commission as Director. Entrepreneurship weekend and the connectivity team continued to provide services to Cape entrepreneurs under the leadership of the Cape Cod Chamber of Commerce.

**Milestones for Next Year:** CEDS stakeholders gathered after the second SmarterCape Summit to identify which projects staff should focus on during the next CEDS year. The projects were ranked as follows:

1. Canal Area Study
2. (a) Wastewater in Economic Centers | (b) Intelligent Transportation Plan
3. SmarterCape Initiative: Strategic Information Office
4. Regional Finance Board
5. (a) Entrepreneurship Capital Access and Training | (b) Integrated Resource Plan | (c) SmarterCape Marketing Plan
6. Energy Demand Reduction
7. Educational Clearinghouse
8. SmarterVillage Certification Program

Project summaries are included in Chapter 5 for the new projects added after the summit as well as a detailed table showing the status of all projects.



## Chapter 1: CEDS Structure & Process

### THE CAPE COD REGION

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

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

The region completed its most recent five-year update of the Comprehensive Economic Development Strategy (CEDS) in June 2009. The US Economic Development Administration approved this plan in July 2009. In completing the 5-year update, the region chose a unique, intensive planning process in order to address current conditions and add focus to economic development in the region. The CEDS is built on the Cape Cod Regional Policy Plan (RPP); it incorporates the economic development goals and regional growth policy from the RPP.

### THE LEGAL AND PHILOSOPHICAL BASIS FOR THE CEDS

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

### THE CAPE COD COMMISSION ACT

The Cape Cod Commission was established in 1990 through an Act of the Massachusetts State Legislature (1989) and a countywide referendum. The Cape Cod Commission Act outlines the agency’s role as follows:



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*The purpose of the Cape Cod Commission shall be to further: the conservation and preservation of natural undeveloped areas, wildlife, flora and habitats for endangered species; the preservation of coastal resources including aquaculture; the protection of groundwater, surface water and ocean water quality; as well as the other natural resources of Cape Cod; balanced economic growth; the provision of adequate capital facilities, including transportation, water supply, and solid, sanitary and hazardous waste disposal facilities; the coordination of the provision of adequate capital facilities with the achievement of other goals; the development of adequate supply of fair affordable housing; and the preservation of historical, cultural, archeological, architectural, and recreational values.*

In fulfilling this mission, the Cape Cod Commission is authorized (1) to regulate developments that are considered to have regional impact, (2) oversee land use planning on Cape Cod, and (3) recommend the designation of areas as Districts of Critical Planning Concern (DCPC), among other duties.

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

#### THE REGIONAL POLICY PLAN

The Cape Cod Commission Act calls for the development of a Regional Policy Plan (RPP) to outline a coherent set of planning policies and objectives to guide development on Cape Cod and to protect its resources. The Act requires that the Regional Policy Plan identify the Cape's critical resources and management needs, establish a growth policy for the Cape, set regional goals, and develop a policy for coordinating local, regional, and other planning activities. The RPP establishes a basis for economic



development planning on Cape Cod, envisioning synergy between economic development and the protection and preservation of the Cape's resources and heritage.

## THE CEDS PLANNING STRUCTURE

### THE CEDS LEAD AGENCY

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

The Commission's 19-members represent each town on Cape Cod, the County of Barnstable, the Governor, and the Native American and minority communities on Cape Cod (see sidebar to right). The Commission is supported by a staff of full-time planners and technical specialists in the areas of water resources, transportation, housing, natural resources, community design, and economic development. The Economic Development Officer is the CEDS Project

### **The Cape Cod Commission - Organizational Structure**

#### Commission Members (19)

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

#### Economic Development Staff (4.5)

- Chief Economic Development Officer (CEDS Project Manager)
- Special Projects Coordinator
- Economic Development Special Projects Coordinator
- Economic Development Data Center Programmer
- Economic Development Council Administrative Assistant (0.5 FTE)

#### Other Staff (~40 total)

- Executive Director
- Deputy Director
- Technical Services Director
- Chief Planner
- Chief Regulatory Officer
- Land Use, Community Design, and Natural Resource Planners
- Transportation Engineers & Planners
- Hydrogeologists & Hydrologists
- Regulatory Officers



Manager.

#### THE CEDS STRATEGY COMMITTEE

The Cape Cod Economic Development Council (EDC) serves as the CEDS Strategy Committee for Barnstable County. The EDC is a 14-member advisory council to Barnstable County. The EDC, together with the Cape Cod Commission

members, represent the economic development constituencies called for in the federal EDA guidelines. The mission of the EDC is to improve the quality of life of the residents of Barnstable County by fostering a stronger year-round economy. To focus their efforts, the EDC has adopted a four-pronged strategy:

- Create a more educated and skilled workforce
- Expand artistic/cultural and intellectual capital
- Promote healthcare, technology, environmental science, and marine/coastal industry clusters
- Identify “choke points” involving physical infrastructure that limit options for economic development

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

#### THE CEDS WORK GROUPS

As part of the 2009 five-year update of the CEDS the Commission and the EDC asked regional organizations important to economic development on the Cape to participate on a work group charged with selecting priority

#### **The Cape Cod Economic Development Council - Organizational Structure**

##### Council Members (14)

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



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
- Business Climate

Sixty-one participants represented 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.

## DEVELOPMENT OF THE CEDS FIVE-YEAR PLAN:

The Cape Cod Commission (CCC) and the Cape Cod Economic Development Council (EDC) devoted an unprecedented amount of financial and staff resources to the development of the 2009 five-year plan and its implementation. The Commission designed an innovative and intensive public planning process. EDC funding helped the group achieve the ambitious planning goals and tight schedule. Unlike a typical protracted planning process, this effort took just two months from start to finish. The process built on the year-long Regional Policy Plan public process completed in December 2008 and focused most on development of regional priority projects. The work group structure, supplemented by several focus group sessions, and a two-week public comment period advanced the process. (See 5-Year CEDS for a detailed description of the process.)

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

- Cape Cod Commission Planning Committee (May 26, 2009)  
Reviewed the CEDS chapters and priority projects; recommended approval by the full Commission.



- Cape Cod Economic Development Council (June 4, 2009)  
Endorsed CEDS and recommended adoption by the Cape Cod Commission on behalf of Barnstable County; incorporated CEDS implementation into work plan.
- Cape Cod Commission (June 11, 2009)  
Certified the CEDS as consistent with Regional Policy Plan and adopted it for implementation.

## IMPLEMENTATION OF THE CEDS FIVE-YEAR PLAN: EVALUATING PROGRESS

Implementation of the CEDS began as soon as the CEDS was approved locally and delivered to the EDA. The Cape Cod Economic Development Council voted in June 2009 to dedicate \$350,000 annually for three years to the implementation of the CEDS; subsequently the EDC has approved funding for the last two years at \$290,000 annually. As the regional planning agency responsible for the CEDS, the Cape Cod Commission is the grant recipient, using the EDC funding to hire the economic development staff and consultants necessary to realize the CEDS action plan. The action plan includes helping get the regional priority projects

### **Cape Cod Commission Economic Development Staffing for CEDS Implementation**

- Chief Economic Development Officer (Leslie Richardson)
- Special Projects Coordinator (Tabitha Harkin)
- Special Projects Coordinator (Sandra Perez)
- Virtual Data Center Programmer (Ryan Ellison)
- Administrative Assistant (Taree McIntyre) (0.5)

off the ground, improving data dissemination, and providing technical assistance to towns through an intensive process called “RESET.”

The annual evaluation process took place during the months of April and May. The process was

designed to continue the high level of engagement by regional stakeholders that characterized the five-year update process. The evaluation process had three parts:





1. CEDS Work Plan Evaluation by the CCEDC
2. Priority Project Evaluation
3. Adoption of Year 2 Action Plan by CEDS Strategy Committee

#### CEDS ACTION PLAN EVALUATION

The CEDS Five-Year Plan and each of the subsequent annual reports include an action plan that outlines the work of the Cape Cod Commission for the following year. The Cape Cod Economic Development Council, as the strategy committee and the funding entity for CEDS implementation, is responsible for evaluating how effective the Commission has been in completing the CEDS work plan. The EDC reviewed progress on the plan, identifying those activities where the Commission had been successful as well as those where it had been less so. The EDC reviewed the measures of success, identified some new measures for the next year, and established priorities while reviewing the plan of work proposed for the next year of implementation. The results from this process are included in Chapter 4.

#### PRIORITY PROJECT EVALUATION

Rather than reconvene the CEDS work groups this year as we did last year, we partnered with several organizations to host the SmarterCape Summit II to showcase the success of OpenCape building a middle-mile broadband network and allowed participants to discuss how best to take advantage of this new infrastructure to further economic development on the Cape. Sessions were developed around many of the CEDS priority projects to discuss how these projects could be moved forward given the new infrastructure OpenCape is constructing.

The four host organizations – the Cape Cod Commission/Cape Cod EDC, the Cape Cod Chamber, the Cape Cod Technology Council, and Open Cape Corporation – came together in February to organize the conference which took place on May 14<sup>th</sup> and 15<sup>th</sup>. The agenda for the summit is included in the Appendix.

In addition to the summit, CEDS organizers asked the priority project teams to evaluate their progress and establish milestones for the coming year. With this information in hand, CEDS stakeholders gathered on May 22, 2012 to prioritize the projects for the next year. Staff presented an





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update on the regional economy and on the business survey results to provide the necessary context needed to prioritize the regional projects.

#### ADOPTION ACTION PLAN

Once the evaluation process was completed, staff compiled all the new information into this CEDS Annual Report for adoption by the strategy committee, and ultimately by the Cape Cod Commission on behalf of Barnstable County.



## Chapter 2: CEDS Vision

### CHANGES OR UPDATES TO THE CEDS VISION

The foundation of the CEDS is the Regional Policy Plan (RPP) which the Cape Cod Commission updates on a five year cycle, most recently just prior to the Five-Year Update of the CEDS. As a result, there are no changes to this chapter outlining the vision, growth policy, or goals of the CEDS.

### BACKGROUND

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

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

The Regional Policy Plan (RPP), upon which the CEDS is built, looks at economic development from a land use and resource protection perspective, recognizing that these issues determine the mix and size of economic activities on the Cape. Land use is seldom the first thing that comes to mind in discussions of economic development. The focus is usually on job creation or quality, workforce availability, or how to attract a certain kind of business without realizing that if land use policy and



zoning are not aligned with these goals, the goals are unlikely to be realized.

## THE REGION'S GROWTH POLICY

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

### THE GROWTH POLICY FOR CAPE COD

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

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

## THE REGION'S ECONOMIC DEVELOPMENT VISION

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



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

The RPP outlines four core economic development principles:

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

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

### A VISION FOR CAPE COD

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



## THE REGION'S ECONOMIC DEVELOPMENT GOALS

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

### *Goal - ED1: Low-impact and Compatible Development*

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

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

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

Specific objectives under this goal are:



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

*Goal - ED2: A Balanced Economy*

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

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

Specific objectives under this goal are:

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

*Goal - ED3: Regional Income Growth*

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

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

Specific objectives under this goal are:

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

*Goal – ED4: Infrastructure Capacity*

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



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

Specific objectives under this goal are:

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

## THE REGION'S GOAL FOR THE CEDS AND CEDS PROCESS

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

### *Goal – CEDS1: Regional Collaboration & Joint Commitment*

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





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

Specific objectives under this goal are:

- Attract public and private investment to the region and for the CEDS priority projects
- Create year-round jobs with competitive wages consistent with the cost of living on Cape Cod
- Strengthen, expand, and create new partnerships between organizations and people traditionally involved in economic development and those not typically working in this arena
- Improve regional awareness of economic development concepts and challenges specific to the Cape
- Improve availability of information and data on different aspects of the region and towns therein



## Chapter 3: CEDS Context

### NEW DEVELOPMENTS & TRENDS DURING YEAR 3

The nation experienced major economic and financial dislocation between 2008 and now. Cape Cod has not been spared during this downturn; with an economy heavily dependent on disposable income, the Cape has been as hard hit as any other resort area with high rates of unemployment, bankruptcies, home foreclosures, and declining individual incomes.

This chapter outlines the basic structure of the regional economy using standard demographic and economic data, including 2010 Census data. In addition to the standard data, this chapter presents:

1. Economic Distress Criteria relevant to the region's effort to obtain Economic Development Distress District designation from EDA
2. Benchmarks designed by the Cape Cod Commission to gauge Cape Cod's economic balance and regional wealth over time
3. New town charts and tables that illustrate the economic differences between the Cape's sub-regions
4. New survey research about Cape Cod businesses completed for the Cape Cod Commission by the University of Massachusetts Donahue Institute in 2012

### DESCRIPTION OF THE CAPE COD REGIONAL ECONOMY

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

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

## QUICK FACTS

The following table compares population, housing, income, and education for Barnstable County with the state and the nation using the most up-to-date data available.

Relative to the double-digit growth of prior decades, population over this decade has been relatively stable. Despite increases early in the decade, reductions in subsequent years resulted in a net decline of almost 3% (6,342 people) according to the 2010 Census. This is not an entirely unwelcome trend given that the rapid growth in the prior three decades led to negative environmental and land-use impacts.

The Cape has a destination-based economy reliant on tourism, second-home ownership, and retirement populations. This can be seen in the housing data where 35.5% of the housing stock is owned by second-home owners.

People & Income Overview (By Place of Residence)	Barnstable County	MA	United States
Population (2010 Census)	215,888	6,547,629	308,745,538
Growth (%) Since 2000	-2.90%	3.1%	9.7%
Growth (%) Since 1990	15.70%	8.80%	24.10%
Growth (%) Since 1970	123.40%	15.10%	51.90%
Land Area (in sq. miles)	395.5	7,840.00	3,537,438.40
Population Density (2010 Census)	545.9	835.2	87.3
% Reporting One Race Only (ACS 2006-2010)	98.20%	97.80%	97.60%
% Reporting Only African American (ACS 2006-2010)	1.90%	6.50%	12.50%
% Reporting Hispanic (of any race) (ACS 2006-2010)	2.1 %	9.00%	15.70%
Households (2010 Census)	95,755	2,547,075	116,716,292
Housing Units (2010 Census)	160,281	2,808,254	131,704,730
Occupied Housing Units	95,755	2,547,075	116,716,292
Seasonal Housing Units	56,863	115,630	4,649,298
Labor Force (2010)	123,046	3,494,271	153,889,000
Unemployment Rate (2010)	9.2	8.5	9.6
Average Annual Wage – Covered Employment (2010)	\$39,175	\$57,739	\$46,742
Median Household Income (ACS 2006-2010)	60,317	64,509	51,914
Per Capita Personal Income (PCPI) (2009)	\$50,128	\$49,653	\$39,635
10 Year PCPI Growth (%) adjusted for inflation	12.90%	12.70%	10.20%
Poverty Rate (2009)	8.1	10.3	14.3
H.S. Diploma or More - % of Adults 25+ (ACS 2006-2010)	94.70%	88.70%	85.00%



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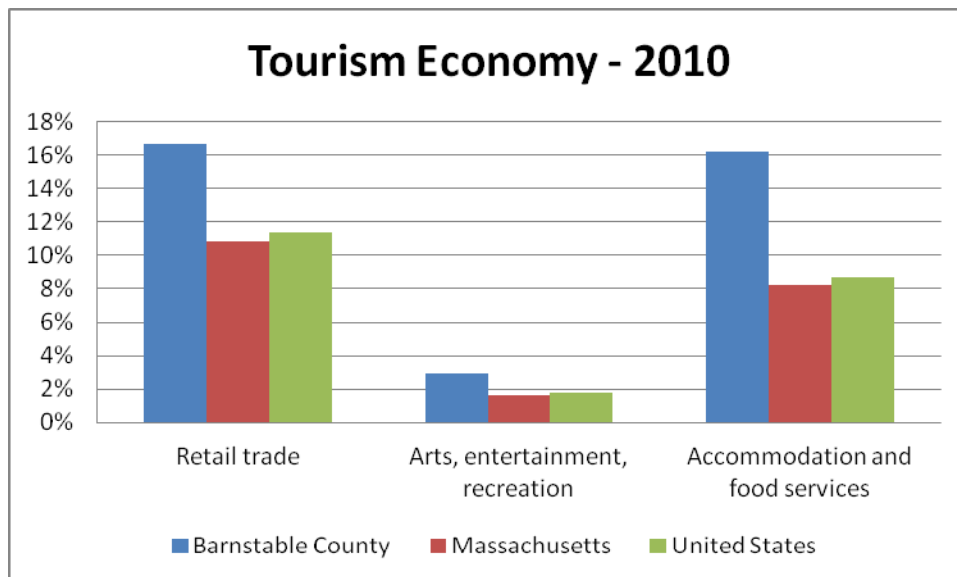
People & Income Overview (By Place of Residence)	Barnstable County	MA	United States
Bachelor's Deg. or More - % of Adults 25+ (ACS 2006-2010)	40.50%	38.30%	27.90%

Sources: Bureau of Labor Statistics, Bureau of Economic Analysis and Census Bureau

Wages on Cape Cod continue to be significantly lower than in Massachusetts and the US as a whole while per-capita income is actually higher than these counterparts and poverty rates are lower. The population of the Cape is also more educated than the average.

#### EMPLOYMENT & WAGES BY SECTOR

The majority of jobs on Cape Cod in 2010 are in two sectors closely tied to tourism: retail (16.7%) and accommodation & food services (16.2%). Also related to tourism is the arts & recreation sector which employs (2.9%).



Each of these industries constitutes a much larger share of employment on Cape Cod than in Massachusetts or the US. The average annual wage in the retail sector is \$ 28,036, while average wages in accommodation & food services is \$ 20,426 annually. The overall county average wage is \$39,175. A significant portion of activity in these industries is seasonal,

being related to tourism and second-home ownership, particularly on the Outer Cape, where the year-round population remains relatively small.

2010 Industry Employment & Wages	Barnstable County,		Massachusetts		United States	
Covered Employment	Jobs	Avg. Wage	Jobs	Avg. Wage	Jobs	Avg. Wage
Total Covered Employment and Wages	88,561	\$39,175	3,149,508	\$57,739	127,831,898	\$46,742
Private	84.20%	\$36,989	86.80%	\$58,319	83.10%	\$46,451
Agriculture, forestry, hunting			0.20%	\$47,424	0.90%	\$26,748
Mining			0.00%	\$56,229	0.50%	\$90,376
Construction	5.50%	\$48,098	3.70%	\$61,233	4.40%	\$49,428
Manufacturing	2.20%	\$51,556	8.10%	\$75,196	9.00%	\$57,580
Wholesale trade	1.60%	\$56,457	3.90%	\$79,238	4.30%	\$63,627
Retail trade	16.70%	\$28,036	10.80%	\$27,808	11.40%	\$26,659
Transportation, warehousing	2.60%	\$41,353	2.80%	\$45,562	3.90%	\$46,479
Utilities	0.50%	\$90,541	0.40%	\$93,052	0.60%	\$78,845
Information	2.00%	\$44,062	2.90%	\$88,291	2.20%	\$72,186
Finance and insurance	2.40%	\$69,647	5.40%	\$115,203	4.30%	\$84,461
Real estate, rental, leasing	1.60%	\$33,930	1.30%	\$60,055	1.50%	\$43,793
Professional, technical services	4.90%	\$61,862	8.00%	\$101,064	5.90%	\$77,255
Management of companies, enterprises	0.40%	\$47,182	1.80%	\$103,920	1.50%	\$98,215
Administrative, waste services	3.60%	\$34,191	5.00%	\$38,452	5.90%	\$33,373
Educational services	7.70%	\$46,835	10.30%	\$52,379	9.50%	\$42,749
Health care, social assistance	17.50%	\$45,820	16.60%	\$51,927	14.10%	\$44,447
Arts, entertainment, recreation	2.90%	\$28,245	1.60%	\$34,726	1.80%	\$31,780
Accommodation and food services	16.20%	\$20,426	8.20%	\$19,342	8.70%	\$17,250
Other services, exc. public administration	4.50%	\$28,722	4.30%	\$27,590	3.40%	\$29,540
Public Administration	6.20%	\$54,596	4.40%	\$59,439	5.90%	\$54,387

Source: Covered Employment and Wages, US Bureau of Labor Statistics, 2010

The largest employment sector is health care and social services (17.4%), with an annual average wage of \$45,544 in 2009. 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% and 10% of employment on Cape Cod. The rest of the regional economy is made up of smaller industry sectors, each employing less than 5% of those working in the county.



## REGIONAL OCCUPATIONAL & INDUSTRY CLUSTERS

The Commission has used the regional clusters analysis tool on STATSamerica.org website to determine where occupational and job concentrations exist and where growth should occur.

The Barnstable County Occupation Clusters table below shows the number of people working in different occupations on Cape Cod and how that share of employment compares to the US. The location quotients (LQ) or healthcare-related occupations are consistent with the Cape's larger than average older population. The strong construction and renovation industry on Cape Cod is clearly shown by the greater-than-average share of skilled technicians, builders and designers, and real estate professionals. The larger-than-average share of people with arts, entertainment, publishing, and broadcasting occupations reflects an arts tradition on the Cape and the area's success as a tourism destination. Despite efforts to build on the marine science and technology sector on the Cape there are fewer than expected people with technology-based occupations such as engineering, natural sciences, and information technology. As a whole the technology-based knowledge clusters include only 7.3% of occupational employment, 87% of what the data suggests could be in the region.

Barnstable County Occupational Clusters – 2009 (most recent available)	Occupation Cluster Employment	Occ. Cluster Share of Total Emp.	Occupation Cluster Employment LQ
Managerial, Sales, Marketing and HR	13,036	9.40%	1.07
Skilled Production Workers: Technicians, Operators, Trades, Installers & Repairers	10,686	7.70%	1.09
Health Care and Medical Science (Aggregate)	9,120	6.60%	1.17
Health Care and Medical Science (Medical Practitioners and Scientists)	2,282	1.60%	1.28
Health Care and Medical Science (Medical Technicians)	1,640	1.20%	1.04
Health Care and Medical Science (Therapy, Counseling and Rehab)	5,198	3.80%	1.18
Mathematics, Statistics, Data and Accounting	2,994	2.20%	0.88
Legal and Financial Services, and Real Estate (L & FIRE)	11,825	8.50%	1.04
Information Technology (IT)	1,798	1.30%	0.64
Natural Sciences and Environmental Management	555	0.40%	0.87
Agribusiness and Food Technology	982	0.70%	0.47
Primary/Secondary & Vocational Education, Remediation & Social Services	6,704	4.80%	0.91
Building, Landscape and Construction Design	669	0.50%	1.02

Barnstable County Occupational Clusters – 2009 (most recent available)	Occupation Cluster Employment	Occ. Cluster Share of Total Emp.	Occupation Cluster Employment LQ
Engineering and Related Sciences	1,084	0.80%	0.77
Personal Services Occupations	3,067	2.20%	0.97
Arts, Entertainment, Publishing and Broadcasting	4,072	2.90%	1.40
Public Safety and Domestic Security	1,826	1.30%	1.10
Postsecondary Education and Knowledge Creation	1,379	1.00%	0.84
Job Zone 2	43,836	31.70%	0.94
Job Zone 1	24,866	18.00%	1.23
Technology-Based Knowledge Clusters	10,091	7.30%	0.87

Source: Economic Modeling Specialists, Inc. Complete Employment Statistics, 2009

The Barnstable County Industry Clusters table below takes an alternative perspective by looking at the shares of different jobs provided by employers in the region. These data show Barnstable County's strength in arts, entertainment, and recreation, which is consistent with our role as a tourist and second-home owner destination. Education and knowledge creation does appear as a strong industry cluster as well as biomedical/biotechnical employment. The strength of defense and security employment and wages is due to the National Army and National Air Guard stations at the Massachusetts Military Reservation. The Cape shows weakness in the majority of other industry clusters that are more characteristic of manufacturing or natural resource-dependent areas of the country.

Barnstable County Industry Clusters – 2010 (most recent available)	Establish -ments	Establish -ment LQ	Employ -ment	Employ -ment LQ	Wages	Annual Wages LQ
Total All Industries	9,194	1	88,561	1	\$3,469,408,501	1
Advanced Materials	72	0.49	2,143	0.66	\$183,746,779	0.96
Agribusiness, Food Processing & Technology	68	0.49	523	0.25	\$19,307,678	0.29
Apparel & Textiles	54	0.68	183	0.28	\$7,080,333	0.30
Arts, Entertainment, Recreation & Visitor Industries	631	2.34	6,852	1.95	\$182,056,472	1.77
Biomedical/Biotechnical (Life Sciences)	297	0.91	12,555	1.29	\$583,958,470	1.50
Business & Financial Services	1,029	0.71	3,968	0.51	\$257,315,112	0.48



Barnstable County Industry Clusters – 2010 (most recent available)	Establish -ments	Establish -ment LQ	Employ -ment	Employ -ment LQ	Wages	Annual Wages LQ
Chemicals & Chemical Based Products	34	0.49	358	0.26	\$23,123,552	0.32
Defense & Security	221	0.66	5,020	1.03	\$364,470,736	1.30
Education & Knowledge Creation	146	1.16	3,111	0.91	\$154,023,774	1.12
Energy (Fossil & Renewable)	282	0.69	3,144	0.8	\$230,351,235	0.96
Forest & Wood Products	30	0.42	143	0.15	\$7,320,038	0.20
Glass & Ceramics	8	0.74	25	0.14	\$511,623	0.07
Information Technology & Telecommunications	171	0.49	2,549	0.75	\$224,392,920	0.87
Transportation & Logistics	111	0.51	1,308	0.5	\$57,443,123	0.55
Manufacturing Supercluster	54	0.39	806	0.22	\$60,824,426	0.30
Primary Metal Mfg	1	0.17	6	0.02	\$337,119	0.03
Fabricated Metal Product Mfg	19	0.32	105	0.12	\$5,977,700	0.17
Machinery Mfg	12	0.4	169	0.25	\$10,850,612	0.31
Computer & Electronic Product Mfg	14	0.73	499	0.66	\$42,840,686	0.72
Electrical Equipment, Appliance & Component Mfg	2	0.27	6	0.02	\$255,421	0.02
Transportation Equipment Mfg	6	0.41	21	0.02	\$562,887	0.01
Mining	5	0.41	53	0.43	\$2,711,478	0.42
Printing & Publishing	140	0.72	995	0.69	\$42,919,727	0.59

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment & Wages (QCEW) and  
Purdue Center for Regional Development (cluster definitions), 2010

## REGIONAL WAGE RATES

Average wages by industry is another statistic for understanding both economic diversity and overall well-being of the working population. Cape Cod has slightly higher wages in tourism related industries (retail and accommodations & food service) as well as other services. These are not, however, particularly high-paying industry sectors. In every other case, Cape Cod has lower, often significantly lower, average wages than the state as a whole. This can be a particular hardship for workers given the higher cost of real estate on Cape Cod than areas just off-Cape.



Annual QCEW - Average Wage, 2010	Barnstable County, MA	Massachusetts	LO
Agriculture, Forestry, Fishing and Hunting	-	\$47,424	-
Mining	-	56,229	-
Utilities	\$90,541	93,052	0.97
Construction	\$48,098	61,233	0.79
Manufacturing	\$51,556	75,196	0.69
Wholesale Trade	\$56,457	79,238	0.71
Retail Trade	\$28,036	27,808	1.01
Transportation & Warehousing	\$41,353	45,562	0.91
Information	\$44,062	88,291	0.50
Finance and Insurance	\$69,647	115,203	0.60
Real Estate and Rental and Leasing	\$33,930	60,055	0.56
Professional, Scientific, and Technical Services	\$61,862	101,064	0.61
Management of Companies and Enterprises	\$47,182	103,920	0.45
Admin. & Support & Waste Management	\$34,191	38,452	0.89
Educational Services	\$46,835	52,379	0.89
Health Care and Social Services	\$45,820	51,927	0.88
Arts, Entertainment, and Recreation	\$28,245	34,726	0.81
Accommodation and Food Services	\$20,426	19,342	1.06
Other Services (Except Public Administration)	\$28,722	27,590	1.04
Public Administration	\$54,596	59,439	0.92

Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment & Wages (QCEW), 2010

## CENSUS 2010 COMPARED TO CENSUS 2000

Cape Cod lost 6,342 residents (2.9%) between the 2000 and 2010 Censuses<sup>1</sup>. The decline would have been slightly larger had it not been for growth in the non-white population.

Barnstable County, Massachusetts: Profile of General Population and Housing Characteristics						
	2010		2000			
Subject	Number	Percent	Number	Percent	Difference	% Change
Total Population	215,888	100	222,230	100	(6,342)	-2.9%
Under 5 years	8,854	4.1	10,599	4.8	(1,745)	-16.5%

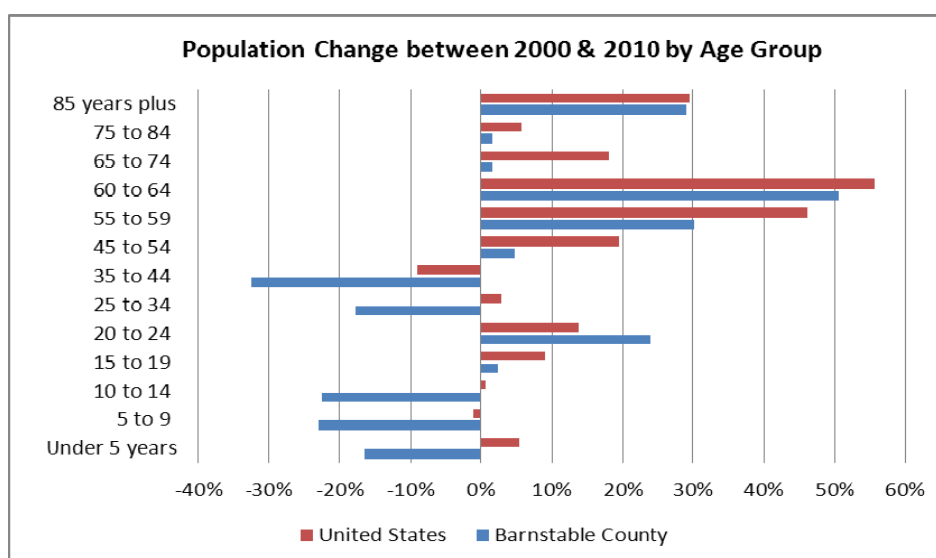
<sup>1</sup> See Appendix for full profile comparing the 2010 Census with the 2000 Census for Barnstable County.



Barnstable County, Massachusetts: Profile of General Population and Housing Characteristics						
Subject	2010		2000		Difference	% Change
	Number	Percent	Number	Percent		
5 to 9	9,874	4.6	12,811	5.8	(2,937)	-22.9%
10 to 14	11,031	5.1	14,208	6.4	(3,177)	-22.4%
15 to 19	12,008	5.6	11,725	5.3	283	2.4%
20 to 24	9,579	4.4	7,735	3.5	1,844	23.8%
25 to 34	17,756	8.2%	21,595	9.7	(3,839)	-17.8%
35 to 44	22,902	10.6%	33,982	15.3	(11,080)	-32.6%
45 to 54	34,363	15.9%	32,802	14.8	1,561	4.8%
55 to 59	17,608	8.2	13,524	6.1	4,084	30.2%
60 to 64	18,034	8.4	11,984	5.4	6,050	50.5%
65 to 74	26,779	12.4%	26,357	11.9	422	1.6%
75 to 84	18,780	8.7%	18,461	8.3	319	1.7%
85 years plus	8,320	3.9	6,447	2.9	1,873	29.1%
Median age	49.9	( X )	44.6	(X)	5	11.9%

Source: Census Bureau, Decennial Census 2000 and 2010

There are fewer residents in the lower age brackets while the older age brackets have increased. Given these age trends, it is not surprising that there has been a decline of almost 4,000 family households with children (16.3% decline) living in the county. There has been an increase of almost 3,000 (8.3%) in the number of households with members age 65 or older, while there has been a reduction in residents living in group quarters, such as nursing homes, by 30.2% (1,716 people). This may be because homes, often used to pay for assisted living accommodations, are worth less and are harder to sell today than in the recent past.



Despite population decline on Cape Cod, 13,198 new housing units have been created since the 2000 Census (9% increase). Over 12,000 of these new units are seasonal. Seasonal housing has grown by 23.5% over the last decade. Meanwhile, the homeowner vacancy rate has nearly doubled from 1.4 to 2.6%. Rental vacancy rates have also increased from 7.4 to 12.4%.

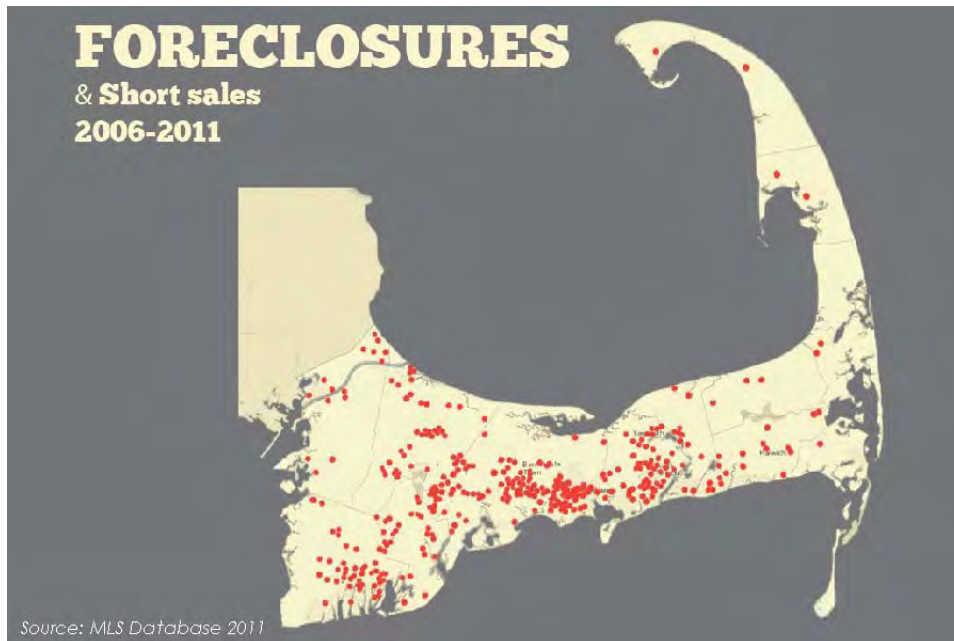
Barnstable County, Massachusetts: Profile of General Population and Housing Characteristics						
	2010		2000			
HOUSING OCCUPANCY	Number	%	Number	%	Difference	% Change
Total housing units	160,281	100	147,083	100	13,198	9.0%
Occupied housing units	95,755	59.7	94,822	64.5	933	1.0%
Vacant housing units	64,526	40.3	52,261	35.5	12,265	23.5%
For seasonal, recreational, or occasional use	56,863	35.5	47,016	32	9,847	20.9%
Homeowner vacancy rate (percent)	2.6	( X )	1.4	(X)	1	85.7%
Rental vacancy rate (percent)	12.4	( X )	7.4	(X)	5	67.6%

Source: Census Bureau, Decennial Census 2000 and 2010

Some of the increase in vacancies may be due to the increase in foreclosures on Cape Cod. Although many foreclosures have been clustered in the village of Hyannis in the town of Barnstable, they have not been limited to that area. Year-to-date foreclosure data for the county is up in 2012 from last year by 23%, according to the Barnstable County Registry of Deeds Statistics for April 2012.



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## REGIONAL INDUSTRY CLUSTERS

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

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

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

The Cape Cod economy, like any economy, is made up of traded sectors and local service sectors. Traded sectors export goods and services and are generally the focus of economic development. On Cape Cod the dominant traded sector is tourism – tourists and second homeowners earn their money off Cape but spend it here, thus increasing the size of the Cape economy. Traditional industries such as fishing, shellfishing, 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 attracted the attention of national competitors. When the economic recovery gets under way 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.

## REGIONAL DISTRESS CRITERIA

### UNEMPLOYMENT AND INCOME

The following table provides the unemployment and income data used by the EDA to determine distress. This table was generated using the website developed by STATSAmerica.org with funding from the EDA. It shows the 24-month averages for each census block in the region; those highlighted in orange represent distressed areas. The total population in these distressed tracts is 21,048 representing just 9.5% of the total population. It is essential to note that the dataset, American Community Survey 5-year estimates, have very large margins of error. The previous run using STATSAmerica based on decennial census data showed many more tracts in distress with approximately 30% of the population living within those tracts. Our own estimates, also using American Community Survey 5-year estimates but ending in 2010 rather than 2009, also showed a higher



percentage of the population – 13% - living in distressed tracts. Again, this number is subject to large margins of error so may well be larger.

Economic Distress Criteria—Primary Elements	Region	U.S.	Threshold Calculations
2009 Unemployment Rate (5 Year ACS)	N/A	7.2	N/A
2009 Per Capita Money Income (5 Year ACS)	\$34,996	\$27,041	129.42%

Economic Distress Criteria—Geographic Components	Unemp. Rate 2009 ACS	Threshold Calculation	PCMI 2009 ACS	Threshold Calculation	Population 2009 ACS
Tract 0101.00 Barnstable, MA	5.9	-1.3	\$39,450	145.9	3,407
Tract 0102.00 Barnstable, MA	5.9	-1.3	\$39,463	145.9	4,979
Tract 0103.00 Barnstable, MA	8.8	1.6	\$33,384	123.5	5,488
Tract 0104.00 Barnstable, MA	1.2	-6	\$31,907	118	3,184
Tract 0105.00 Barnstable, MA	4.6	-2.6	\$41,386	153	3,098
Tract 0106.00 Barnstable, MA	2.8	-4.4	\$45,139	166.9	3,499
Tract 0107.00 Barnstable, MA	7	-0.2	\$47,985	177.5	3,262
Tract 0108.00 Barnstable, MA	3.6	-3.6	\$37,967	140.4	4,951
Tract 0109.00 Barnstable, MA	7.8	0.6	\$30,790	113.9	5,108
Tract 0110.00 Barnstable, MA	7.9	0.7	\$37,763	139.7	4,634
Tract 0111.00 Barnstable, MA	3.1	-4.1	\$31,276	115.7	4,168
Tract 0112.00 Barnstable, MA	4.4	-2.8	\$39,313	145.4	3,514
Tract 0113.00 Barnstable, MA	6.3	-0.9	\$35,020	129.5	2,741
Tract 0114.00 Barnstable, MA	3.7	-3.5	\$32,560	120.4	3,512
Tract 0115.00 Barnstable, MA	3.6	-3.6	\$28,358	104.9	4,105
Tract 0116.00 Barnstable, MA	7.8	0.6	\$26,901	99.5	3,366
Tract 0117.00 Barnstable, MA	5	-2.2	\$32,796	121.3	1,864
Tract 0118.00 Barnstable, MA	9.9	2.7	\$36,771	136	6,319
Tract 0120.00 Barnstable, MA	8.1	0.9	\$30,115	111.4	8,797
Tract 0121.00 Barnstable, MA	6.4	-0.8	\$28,891	106.8	8,993
Tract 0122.00 Barnstable, MA	5.6	-1.6	\$43,942	162.5	4,992
Tract 0123.00 Barnstable, MA	3.7	-3.5	\$23,167	85.7	364
Tract 0124.00 Barnstable, MA	20.6	13.4	\$18,713	69.2	2,682
Tract 0125.00 Barnstable, MA	4.6	-2.6	\$40,153	148.5	3,169
Tract 0126.00 Barnstable, MA	4	-3.2	\$24,989	92.4	7,853
Tract 0127.00 Barnstable, MA	4.6	-2.6	\$33,336	123.3	4,957
Tract 0128.00 Barnstable, MA	2.5	-4.7	\$38,006	140.5	3,935

Economic Distress Criteria—Geographic Components	Unemp. Rate 2009 ACS	Threshold Calculation	PCMI 2009 ACS	Threshold Calculation	Population 2009 ACS
Tract 0129.00 Barnstable, MA	3.6	-3.6	\$32,808	121.3	3,996
Tract 0130.00 Barnstable, MA	6.2	-1	\$50,020	185	3,295
Tract 0131.00 Barnstable, MA	6.7	-0.5	\$35,747	132.2	6,344
Tract 0132.00 Barnstable, MA	6.9	-0.3	\$40,469	149.7	5,172
Tract 0133.00 Barnstable, MA	4.9	-2.3	\$35,094	129.8	3,205
Tract 0134.00 Barnstable, MA	4.6	-2.6	\$37,807	139.8	3,676
Tract 0135.00 Barnstable, MA	3.1	-4.1	\$37,935	140.3	6,723
Tract 0136.00 Barnstable, MA	5.9	-1.3	\$27,238	100.7	6,272
Tract 0137.00 Barnstable, MA	9.6	2.4	\$25,544	94.5	5,189
Tract 0138.00 Barnstable, MA	6	-1.2	\$30,554	113	4,865
Tract 0139.00 Barnstable, MA	4	-3.2	\$34,227	126.6	4,519
Tract 0140.00 Barnstable, MA	2.7	-4.5	\$34,981	129.4	3,726
Tract 0141.00 Barnstable, MA	11.4	4.2	\$16,315	60.3	1,370
Tract 0143.00 Barnstable, MA	8	0.8	\$38,465	142.2	4,553
Tract 0144.00 Barnstable, MA	7.4	0.2	\$36,526	135.1	7,371
Tract 0145.00 Barnstable, MA	5.5	-1.7	\$31,857	117.8	6,231
Tract 0146.00 Barnstable, MA	5.4	-1.8	\$30,946	114.4	4,367
Tract 0147.00 Barnstable, MA	3.7	-3.5	\$33,788	125	3,857
Tract 0148.00 Barnstable, MA	5.6	-1.6	\$32,021	118.4	3,253
Tract 0149.00 Barnstable, MA	2.7	-4.5	\$68,806	254.5	3,439
Tract 0150.00 Barnstable, MA	2.1	-5.1	\$26,301	97.3	8,120
Tract 0151.00 Barnstable, MA	6	-1.2	\$32,413	119.9	3,996
Tract 0152.00 Barnstable, MA	3.9	-3.3	\$49,763	184	2,149
Tract Barnstable County, MA	N/A	N/A	\$34,568	127.8	222,629

Sources: U.S. Bureaus of Census, Labor Statistics, and Economic Analysis; generated by STATS America

## 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.

Many branches of the armed services used the MMR intensively since 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 MMR 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.





## CAPE COD COMMISSION

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. 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 of land and surface water and is surrounded by the ocean 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 by only two four-lane bridges and a 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

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; which overlaps with the zenith of Cape Cod's tourist season.

Often worse than the hurricane itself are the accompanying tornadoes and storm surges. 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 in 1991. 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 without adequate evacuations. 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

#### **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.

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 to be 500,000; the actual number vulnerable to a hazard event is unknown.
- 43.2% of year-round residents (or 95,924 people) reside in a SLOSH zone. In addition, the majority of second homes are located in SLOSH zones.
- 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.
- 179 critical facilities are located in a SLOSH zone.
- 7 critical facilities are located in a wildfire risk area.
- Cape Cod is accessible by vehicle by two four-lane bridges that are often seriously congested even without extreme weather events.
- 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 100 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 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%)

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

## 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, and 21 stocks are overfished. 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 were 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.



CAPE COD  
COMMISSION

“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 but also 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 aesthetic character of our communities and the size of the regional economy.

## BALANCED ECONOMY BENCHMARKS

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

- *Protect and build on your competitive advantage* – The Cape’s competitive advantage is its unique natural environment, historic village character, working agricultural land, harbors, and cultural heritage.
- *Use your resources efficiently* – Resources include natural assets, capital facilities, infrastructure, and human capital. Population and land use patterns affect efficiency.



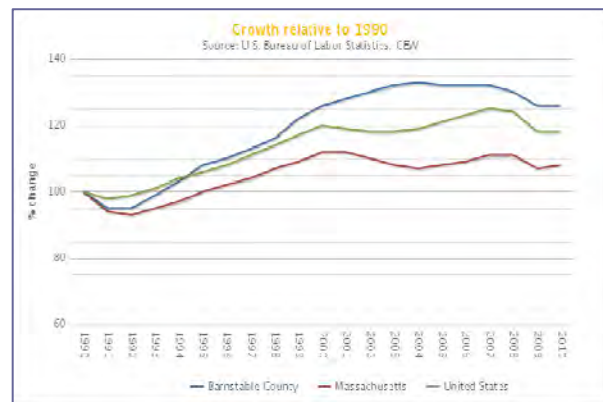
- *Foster balance and diversity* – Economic strength and sustainability benefit from a mixture of industries, businesses, workers, ownership types, and employment options.
- *Expand opportunity and regional wealth* – Methods include increasing exports, substituting imports locally, attracting capital, and fostering local ownership.

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

#### EMPLOYMENT TRENDS: JOB CREATION

Despite a brief dip in employment during the recession of the early 1990s the number of jobs located on Cape Cod increased at a faster rate than in the US and Massachusetts, growing by over 30% during the past two decades.

Employment peaked at 93,198 in 2004. The rate of decline due to the current recession resembles that of the state and nation.

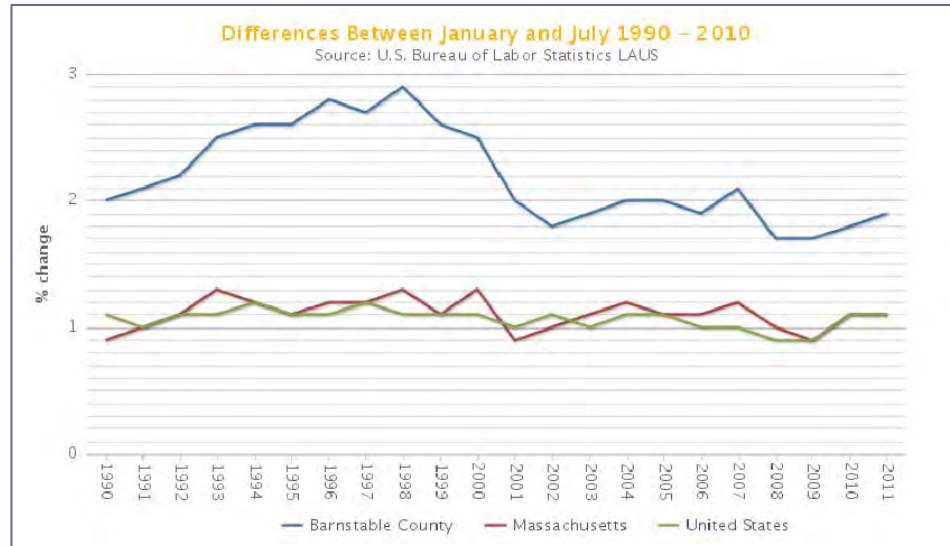


#### EMPLOYMENT TRENDS: SEASONALITY

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



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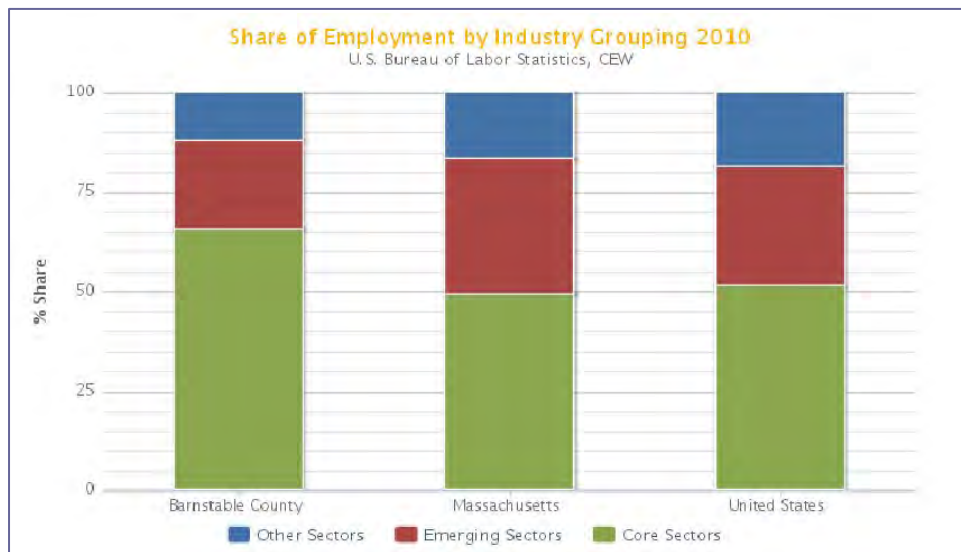


Significant effort over the last two decades has been put towards extending the tourist season into the fall and spring. Problems in keeping part-time and seasonal help have, however, made this difficult. Changes in student school schedules have forced employers to depend on foreign workers, the visas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

#### EMPLOYMENT TRENDS: INDUSTRY CLUSTERS

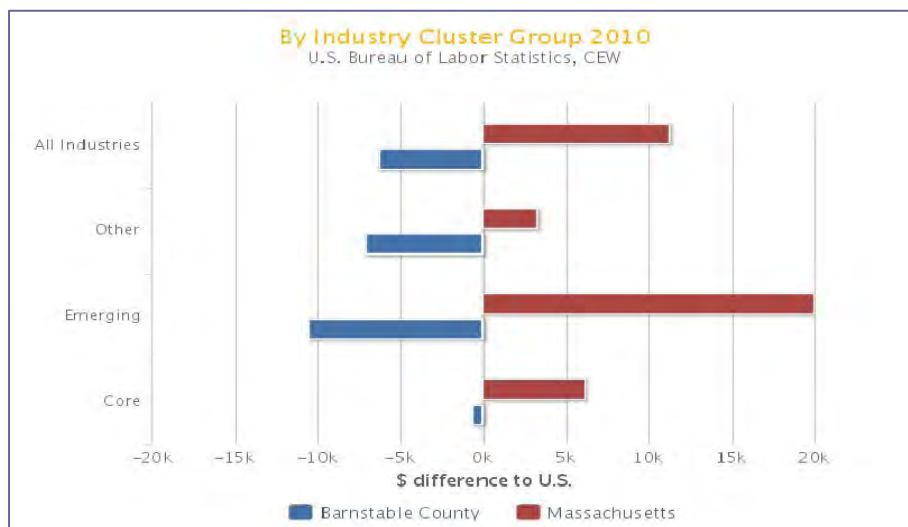
The Cape economy falls into three industry clusters: core, emerging, and other. The core industries include fishing, construction, real estate, retail trade, accommodation and food services, and health care. As a tourism destination many of these can be considered export activities serving people from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





#### WAGE & INCOME TRENDS: INDUSTRY CLUSTERS

**Emerging industries include Arts, Entertainment, and Recreation, Educational Services, Finance and Insurance, Information, and Professional, Scientific, and Technical Services. Businesses and economic leaders would like to see these industries grow in the future to better**



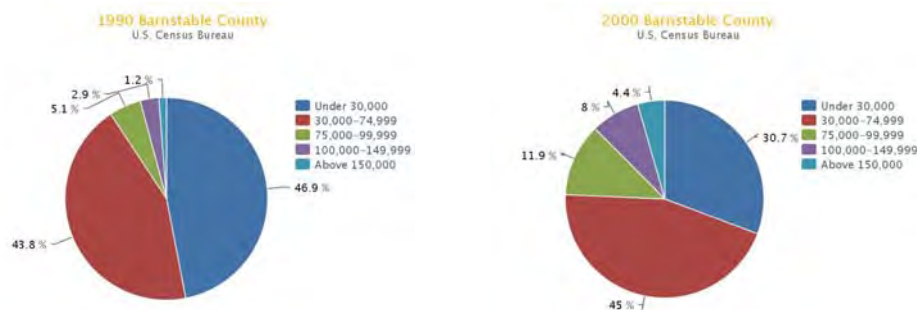
**balance the tourism economy and provide more year-round, high-skill, high-wage jobs for residents.**



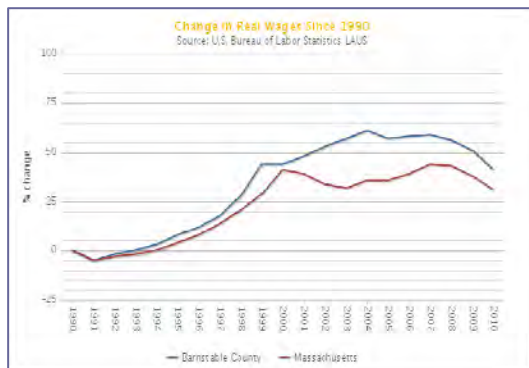
The importance of increasing industry diversity can be seen by looking at wage data. The average wage in the emerging industry cluster (\$49,578 for Barnstable County) is significantly higher than in the core cluster (\$34,377), which is relatively well paid when compared to the US but less so when compared to the state as a whole. Even so, emerging industry wages seriously lag those found statewide and in the US.

#### WAGE & INCOME TRENDS: HOUSEHOLD INCOME

Without controlling for inflation, there appears to be a shift towards higher income groups on the Cape between 1990 and 2000. In 1990 only 8% of all households earned \$75,000 or above; by 2000 this percentage had grown to 24% of all households. It is difficult to determine how much of the change in distribution is due to inflation versus increased wealth



due to higher wages, in-migration of wealthier households, commuters earning higher off-Cape wages, non-earnings income growth, or other factors.



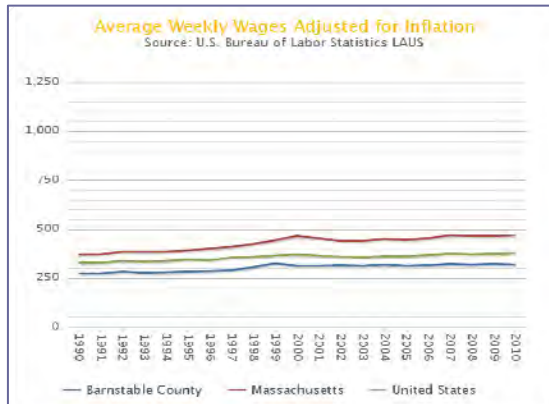
#### WAGE & INCOME TRENDS: TOTAL WAGES IN REAL TERMS

Since 1990, total wages on Cape Cod have grown by 50% in real terms. Growth was very strong during the 1990s for both Barnstable County and the state. The county continued to grow until the recession hit

mid-decade when the decline began to mirror the state's. Overall, however, this data show the positive impact of job growth for both the state and county over the past two decades.



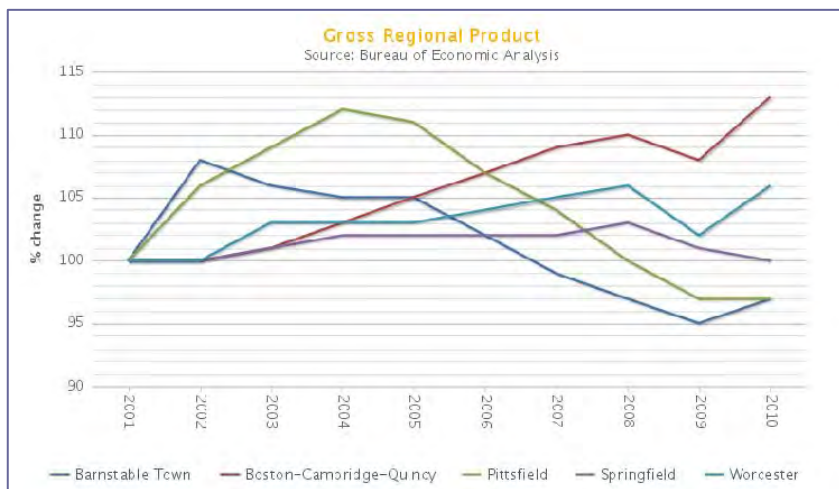
## WAGE & INCOME TRENDS: AVERAGE WAGES PER JOB



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

## WAGE & INCOME TRENDS: REGIONAL INCOME

Barnstable County's Gross Regional Product was stronger in the first half of this decade, dropping to below 2001 level in 2007. Some uplift is evident towards the end of the decade but the region has yet to recover to the levels prior to the recession.



## DATA BY TOWN

New to the CEDS this year is data on the different towns that make up the Cape Cod region. The towns on Cape Cod can be very different from each other. The towns fall into four sub-regions that have similar characteristics. The sub-regions are:

1. Upper Cape: Bourne, Sandwich, Falmouth, and Mashpee
2. Mid Cape: Barnstable, Yarmouth, and Dennis
3. Lower Cape: Chatham, Harwich, Brewster, and Orleans
4. Outer Cape: Eastham, Wellfleet, Truro, and Provincetown

The Upper Cape sub-region has larger numbers of residents commuting to jobs off Cape and has relatively larger family sizes than the other sub-regions. Meanwhile, the Outer Cape has many more seasonal residents, and towns with smaller populations.

## POPULATION BY TOWN

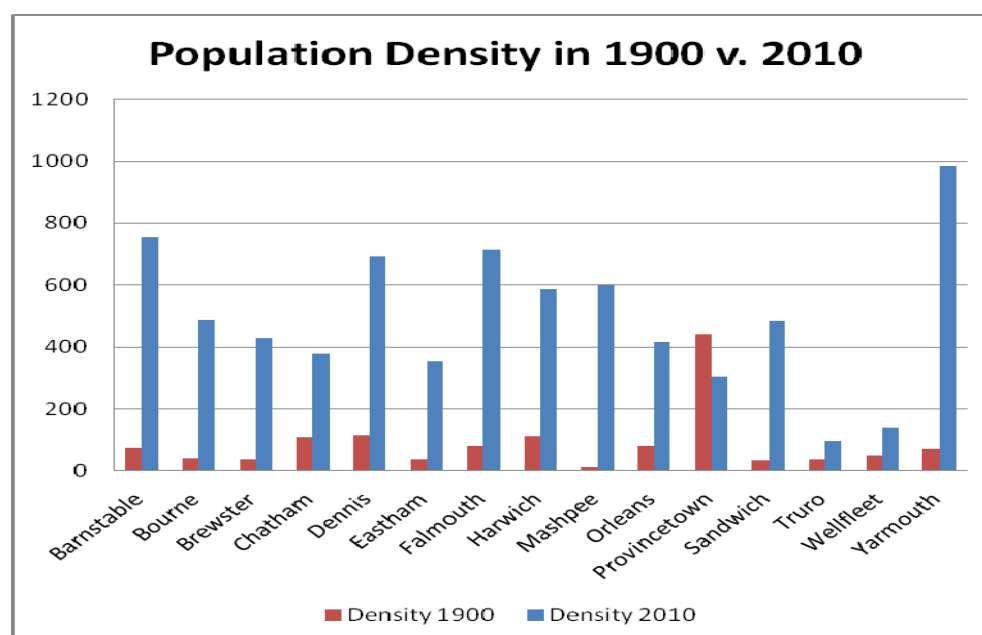
The most populous and physically large town on the Cape is Barnstable (45,193) followed by Falmouth (31,531). The town that has seen the most growth is Mashpee, and the only one to decline relative to 1900 is Provincetown.

Towns	1900	1910	1920	1930	1940	1950	1960	1970	1980	1990	2000	2010
Barnstable	4,364	4,676	4,836	7,271	8,333	10,480	13,465	19,842	30,898	40,949	47,821	45,193
Bourne	1,657	2,474	2,530	2,895	3,315	4,720	14,011	12,636	13,874	16,064	18,721	19,754
Brewster	829	631	688	769	827	987	1,236	1,790	5,226	8,440	10,094	9,820
Chatham	1,749	1,564	1,737	1,931	2,136	2,457	3,273	4,554	6,071	6,579	6,625	6,125
Dennis	2,333	1,919	1,536	1,829	2,015	2,499	3,727	6,454	12,360	13,864	15,973	14,207
Eastham	502	518	430	543	582	860	1,200	2,043	3,472	4,462	5,453	4,956
Falmouth	3,500	3,144	3,500	4,821	6,878	8,662	13,037	15,942	23,640	27,960	32,660	31,531
Harwich	2,334	2,115	1,846	2,329	2,535	2,649	3,747	5,892	8,971	10,275	12,386	12,243
Mashpee	303	270	242	361	434	438	867	1,288	3,700	7,884	12,946	14,006



Towns	1900	1910	1920	1930	1940	1950	1960	1970	1980	1990	2000	2010
Orleans	1,123	1,077	1,012	1,181	1,451	1,759	2,342	3,055	5,306	5,838	6,341	5,890
Provincetown	4,247	4,369	4,246	3,808	3,668	3,795	3,389	2,911	3,536	3,561	3,431	2,942
Sandwich	1,448	1,688	1,458	1,437	1,360	2,418	2,082	5,239	8,727	15,489	20,136	20,675
Truro	767	655	554	513	585	661	1,002	1,234	1,486	1,573	2,087	2,003
Wellfleet	988	1,022	826	823	890	1,123	1,404	1,743	2,209	2,493	2,749	2,750
Yarmouth	1,682	1,420	1,229	1,794	2,286	3,297	5,504	12,033	18,449	21,174	24,807	23,793

Source: Census Bureau, Decennial Censuses



The town of Yarmouth has the most inhabitants per square mile, followed by Barnstable, Falmouth, and Dennis. Population density in Provincetown has declined since its heyday in the early 1900s but it is still the Cape's best example of "smart growth" meaning high density in the center with low or no density around it.

#### HOUSEHOLDS AND FAMILIES BY TOWN

The population is first grouped into households and then family households. The town with the largest household and family household size is Sandwich, which also has the second largest average household

income. Chatham has the highest average household income but the median is much lower, suggesting that there are outliers on the extremely wealthy side. A similar pattern is seen with family income. One anomaly, Wellfleet has a much higher average and median family income than household income – this may be due to sampling error as these data are from the American Community Survey versus the US Census.

Towns	Households	Average Household Size	Average Household Income	Median Household Income
Barnstable	20,380	2.23	80,291	62,264
Bourne	7,730	2.34	75,204	61,418
Brewster	4,453	2.16	76,830	58,374
Chatham	2,909	2.00	102,681	65,990
Dennis	7,007	2.08	66,938	50,642
Eastham	2,497	2.03	74,420	58,750
Falmouth	14,575	2.14	83,334	62,392
Harwich	5,700	2.12	76,096	54,958
Mashpee	5,925	2.34	80,164	62,645
Orleans	3,068	1.95	76,298	56,313
Provincetown	1,909	1.56	65,486	44,646
Sandwich	7,635	2.66	95,997	83,325
Truro	880	2.08	82,652	80,425
Wellfleet	1,651	1.78	85,200	66,109
Yarmouth	11,845	1.99	64,827	48,653

Source: 2006-2010 American Community Survey 5-Year Estimates

Families are made up of people related by birth, marriage, or adoption whereas households can include people who are not so related. Family size tends to be larger than household size and incomes tend to be higher with the notable exception of Provincetown, where the average family income is lower than the average household income.

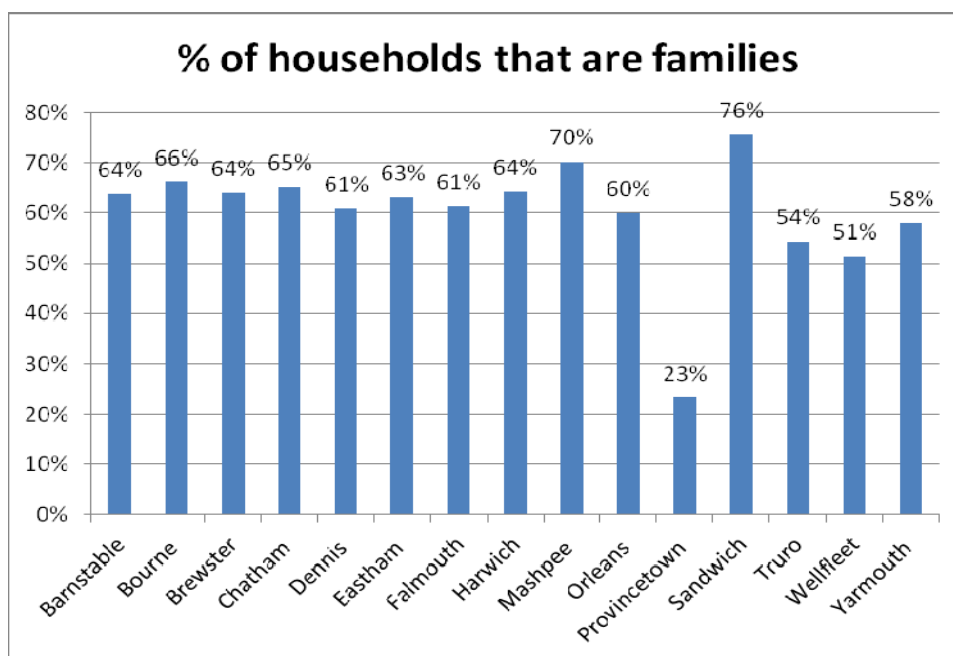
Towns	Family Households	Average Family Size	Average Family Income	Median Family Income
Barnstable	13,015	2.74	93,911	72,741
Bourne	5,121	2.89	87,431	76,405



Towns	Family Households	Average Family Size	Average Family Income	Median Family Income
Brewster	2,851	2.59	89,481	78,635
Chatham	1,897	2.40	129,424	90,445
Dennis	4,263	2.65	78,505	61,896
Eastham	1,579	2.51	87,717	74,479
Falmouth	8,954	2.71	105,200	79,152
Harwich	3,666	2.61	90,391	67,212
Mashpee	4,160	2.78	92,466	74,195
Orleans	1,844	2.37	91,616	72,155
Provincetown	443	2.32	59,301	46,982
Sandwich	5,779	3.12	107,592	95,840
Truro	479	2.65	99,210	85,852
Wellfleet	849	2.34	113,307	90,099
Yarmouth	6,866	2.58	76,734	62,196

Source: 2006-2010 American Community Survey 5-Year Estimates

In Provincetown only 23% of households are families. In the other towns, families constitute between 50 and 76% of households, with Sandwich (76%) having the largest share of families, followed by Mashpee (70%).

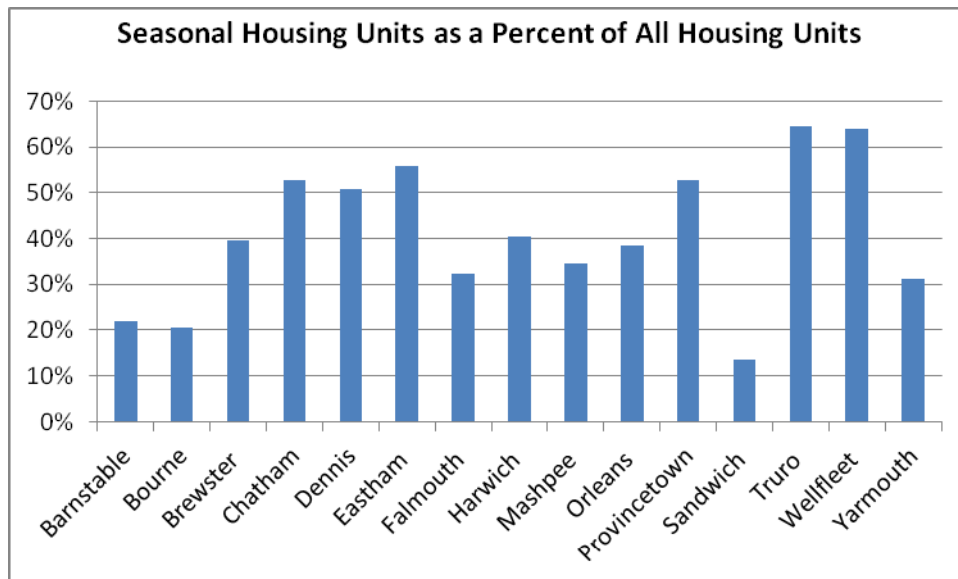


## HOUSING UNITS

To get a complete sense of the development on Cape Cod it is important to look at housing units as well as population because 35.5% of all housing units are occupied not by residents but by second-home owners. This ratio varies greatly by town – again an example of how the different sub-regions have different economic realities. The towns with the greatest ratio of second homes to full-time residents are Truro and Wellfleet. However, in pure number of second homes, Dennis and Falmouth lead.

Towns	Total Housing Units	Owner-occupied Housing Units (including for sale and sold)	Renter-occupied Housing Units (including for rent and rent but not occupied)	Seasonal Housing Units	Other
Barnstable	26,343	14,931	5,371	5,793	248
Bourne	10,805	6,120	2,259	2,221	205
Brewster	7,948	3,687	1,034	3,145	82
Chatham	7,343	2,534	835	3,883	91
Dennis	15,586	5,301	2,211	7,933	141
Eastham	5,960	2,107	426	3,328	99
Falmouth	21,970	10,939	3,650	7,100	281
Harwich	10,284	4,690	1,295	4,163	136
Mashpee	9,882	5,194	1,178	3,409	101
Orleans	5,344	2,350	846	2,054	94
Provincetown	4,494	1,070	972	2,372	80
Sandwich	9,476	6,869	1,192	1,293	122
Truro	3,077	792	248	1,987	50
Wellfleet	4,305	1,134	365	2,755	51
Yarmouth	17,464	8,716	3,106	5,427	215

Source: Census Bureau, 2010 Census



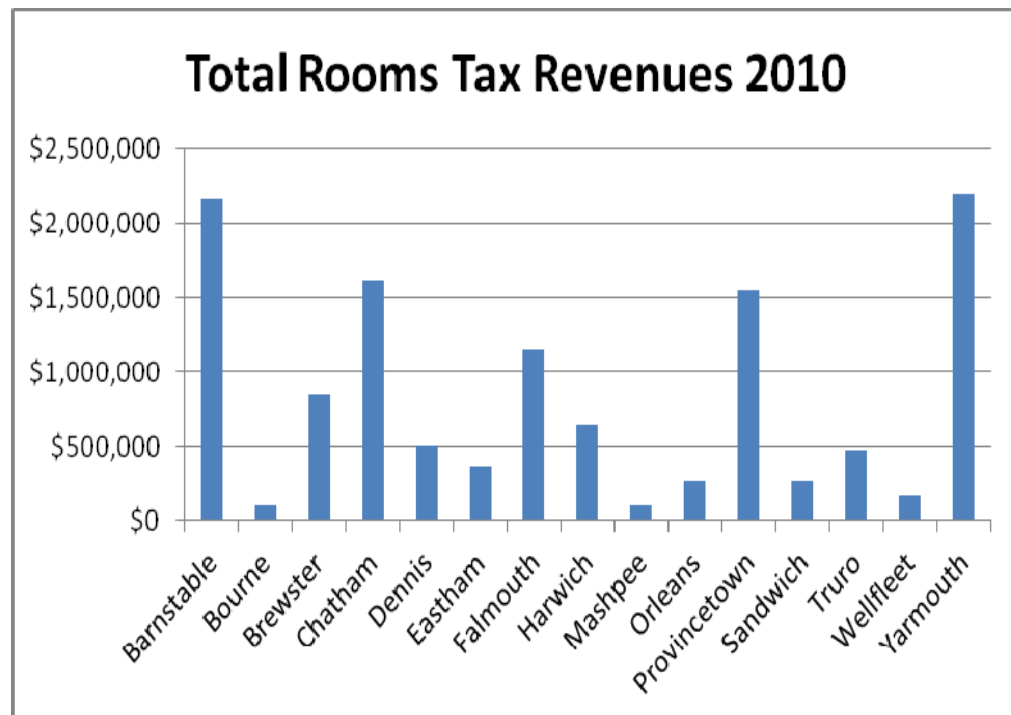
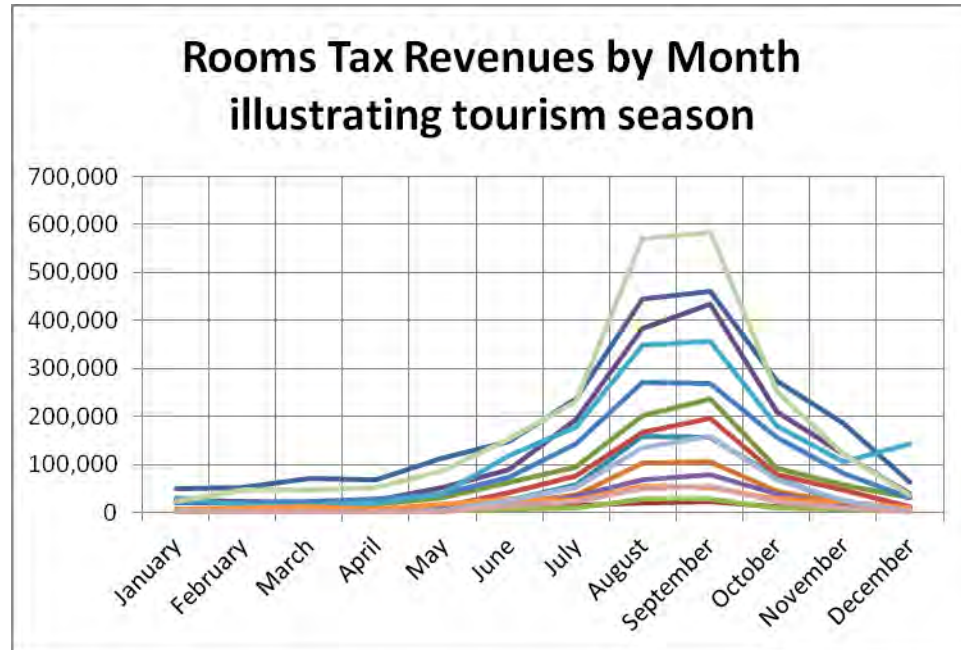
#### ROOM OCCUPANCY TAX BY TOWN

Room occupancy tax is a state and local tax on accommodations costing more than \$15. The data presented here are for 2010 and are supplied by the Massachusetts Department of Revenue. The line graph below shows the pattern of room occupancy tax revenues, which are calculated the month after received – thus it shows that the peak period is July and August. The bar graph shows the revenues generated by town.





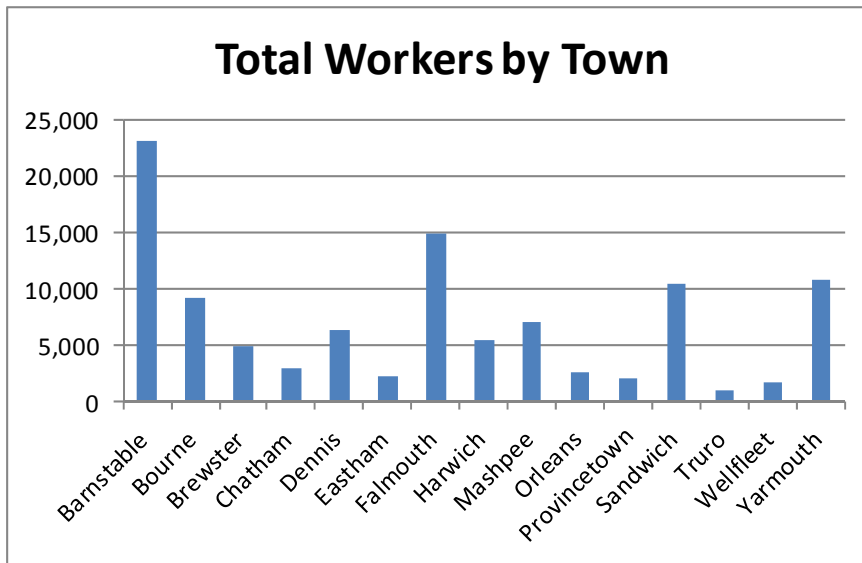
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## WORKERS BY TOWN

The town of Barnstable is home to 23,013 workers, the majority of whom

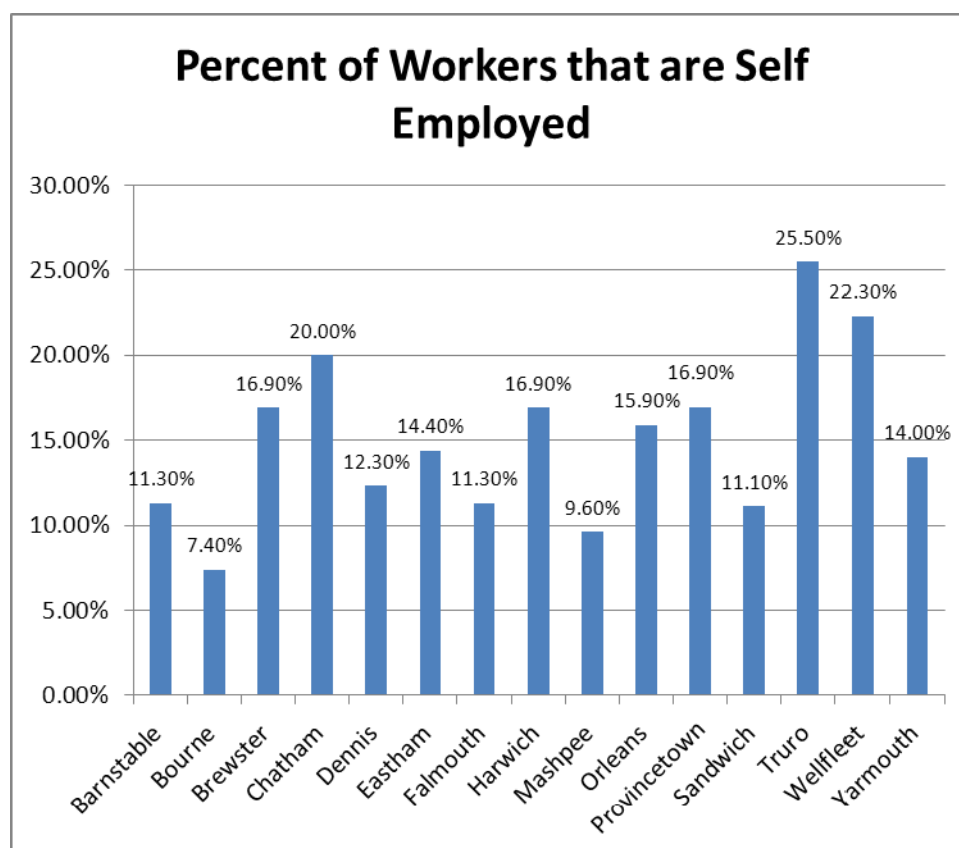


work for private employers. Eastham, with the Cape Cod National Seashore/National Park Service and Nauset Regional High School, has the largest share of government employment. Truro leads in self-employed workers – more than a quarter of the workers living in Truro work for themselves.

Towns	Total Workers	Private Wage	Government Income	Self Employed
Barnstable	23,013	75.3%	13.4%	11.3%
Bourne	9,170	74.5%	18.1%	7.4%
Brewster	4,854	70.4%	12.2%	16.9%
Chatham	2,842	67.6%	11.9%	20.0%
Dennis	6,346	74.2%	13.6%	12.3%
Eastham	2,149	61.1%	24.5%	14.4%
Falmouth	14,947	74.1%	14.5%	11.3%
Harwich	5,350	66.4%	16.7%	16.9%
Mashpee	7,043	75.0%	15.2%	9.6%
Orleans	2,514	75.7%	8.4%	15.9%
Provincetown	1,940	74.7%	8.4%	16.9%

Towns	Total Workers	Private Wage	Government Income	Self Employed
Sandwich	10,463	71.7%	17.1%	11.1%
Truro	973	53.8%	20.8%	25.5%
Wellfleet	1,740	49.8%	27.1%	22.3%
Yarmouth	10,777	75.8%	10.2%	14.0%

Source: 2006-2010 American Community Survey 5-Year Estimates



## EMPLOYMENT AND WAGES BY TOWN

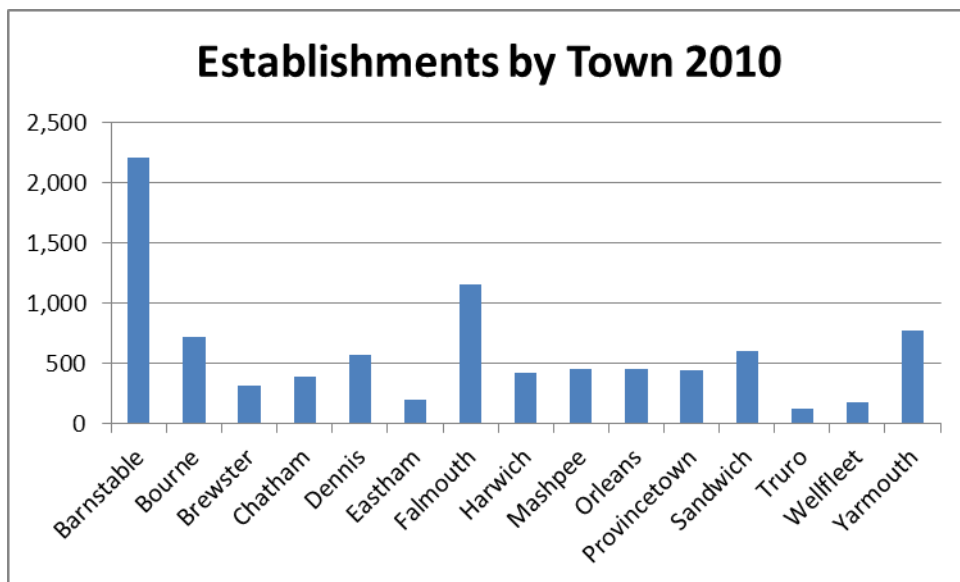
A quarterly survey of employers by the US Bureau of Labor Statistics (“Covered Employment and Wages”) shows the number of people employed in each town and the number of business establishment that employ these worker by each town. Total payroll and average weekly



wages are also provided by town. Barnstable houses the most employers but average wages are highest in Falmouth.

Towns	Establishments	Total Payroll	Average Weekly Wage	Employees
Barnstable	2,204	1,056,877,399	783	25,944
Bourne	718	303,460,565	804	7,262
Brewster	311	91,948,689	673	2,629
Chatham	388	105,854,365	700	2,907
Dennis	574	156,449,336	660	4,556
Eastham	199	35,779,875	595	1,157
Falmouth	1,152	619,293,784	841	14,168
Harwich	420	127,983,100	672	3,660
Mashpee	457	154,698,551	652	4,563
Orleans	457	148,004,420	704	4,045
Provincetown	441	74,986,411	600	2,402
Sandwich	604	195,546,558	743	5,058
Truro	120	18,969,065	674	541
Wellfleet	177	35,623,546	646	1,061
Yarmouth	775	319,686,559	727	8,456

Source: Bureau of Labor Statistics, Covered Employment & Wages, 2010





## COMMUTING TO WORK BY TOWN

Not surprisingly, the most common way to travel to work is alone by car. Interestingly, the town with the largest share of the worker commuting by carpool is Chatham at 10.9%. Provincetown, Cape Cod's true example of smart growth, has 22.7% of its workers commuting by foot.

Towns	Drove Alone	Carpool	Public Transit	Walked	Other	Worked at Home	Mean Travel Time
Barnstable	82.00%	8.80%	1.70%	2.70%	1.10%	3.60%	22.9
Bourne	87.50%	4.50%	0.70%	3.40%	0.90%	2.90%	27.3
Brewster	83.80%	5.30%	0.40%	3.50%	2.20%	4.80%	21.4
Chatham	72.70%	10.90%	0.60%	3.40%	3.60%	8.70%	22.1
Dennis	81.80%	8.80%	0.70%	2.60%	0.30%	5.90%	25.9
Eastham	82.10%	5.00%	0.00%	6.80%	2.00%	4.10%	23.6
Falmouth	81.20%	6.70%	1.60%	1.60%	1.50%	7.40%	24.5
Harwich	83.80%	8.00%	0.90%	1.40%	1.00%	4.80%	20.1
Mashpee	85.80%	5.20%	1.30%	1.20%	1.00%	5.50%	24.2
Orleans	81.60%	6.80%	0.00%	4.30%	1.70%	5.70%	23.4
Provincetown	43.00%	5.00%	1.40%	22.70%	14.00%	13.90%	19.1
Sandwich	82.30%	7.30%	1.60%	1.40%	0.70%	6.70%	27.6
Truro	72.20%	2.30%	1.90%	3.30%	0.00%	20.30%	27.7
Wellfleet	72.10%	4.20%	3.40%	8.40%	1.20%	10.70%	22.5
Yarmouth	82.60%	7.30%	0.90%	2.10%	1.40%	5.70%	21.4

Source: 2006-2010 American Community Survey 5-Year Estimates

## CAPE COD BUSINESS SURVEY

The Cape Cod Commission, with funding from the Cape Cod Economic Development Council, worked with partners to conduct a survey of Cape Cod business. The goal was to better understand the opinions of the business community on development and land use issues, and to understand the cost of doing business in Barnstable County and the impediments to business growth experienced by local businesses



## METHODOLOGY

- **Universe:** 32,535 business entities on Cape Cod (9,194 employers; 23,341 non-employers)
- **Sample:** 17,425 business addresses
- **Responses:** 429 (77.8% of respondents were the owner or operator)
- **2.4% response rate**
- **5% margin of error**

## RESEARCH TEAM

- **Cape Cod Planning Team:**
  - Leslie Richardson and Sandra Perez, Cape Cod Commission
  - Wendy Northcross, Cape Cod Chamber of Commerce
  - Elizabeth Bridgewater, Community Development Partnership
  - David Augustinho, Workforce Investment Board
  - Bob Dubois, Yarmouth Chamber of Commerce
  - Michael Galasso, Falmouth EDIC
  - Joy Jordan, Cape & Plymouth Business Magazine
- **Donahue Institute Research Team:**
  - Joseph Wyman, Research Manager
  - Kristen Gibbons, Project Coordinator

## RESEARCH QUESTIONS

- What is a typical business on Cape Cod?
- What are the major obstacles to business growth on Cape Cod?
- What are the major expenses for business on Cape Cod?
- Does the business community support the Commission's ideas for economic growth as described in the Regional Policy Plan?

## FINDINGS

### Corporate Profile of Cape Cod Businesses

- 54.9% are family-owned
- 33.4% are sole Proprietor; 11.6% Traditional C Corporation
- 1/3 are based out of the home
- 93.6% are independently owned with no parent company
- 4% are franchise businesses
- ½ were established prior to 1995; 6 started in 19<sup>th</sup> Century

### Employment Profile of Cape Cod Businesses



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- 90% are open year-round; 82% are open 40 hours a week or more
- ½ said they had two or fewer full-time, year-round employees and zero full-time seasonal employees
- 68% are employing the same number of people as last year
- 19.7% plan to increase employment over the next year; 5.4% expect to decrease employment
- 13% retail; 13% professional; 10% accommodation and food services; 7% construction

### Business Profile of Cape Cod Businesses

- 78% have gross revenues of \$50,000 or greater
- 39.7% describe their customer base as local residents
- 47% used personal or family savings as their main source of capital over the last 5 years
- 29% used personal or business credit cards as their main source of capital
- 59.5% believe their business will exist on Cape Cod in 10 years

### What are the major obstacles to business growth on Cape Cod?

- Cost of health insurance – 59% significant barrier
- Cost of living on Cape Cod – 42% significant barrier
- Cost of energy - 40% somewhat a barrier
- Finding employees with right skills – 37% somewhat a barrier
- Real estate prices – 35% somewhat a barrier

### What are the major expenses for business on Cape Cod?

- Cost of health insurance
- Cost of energy
- Cost of real estate

### Does the business community support the Cape Cod Commission's ideas for economic growth as described in the Cape Cod Regional Policy Plan?

- “In general, businesses on the Cape do not appear concerned about a lack of development, and seemed more concerned about protecting the Cape's environment.”
- 39.3% indicated that the current amount of residential development was adequate; 19% said there was too much



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- 16% indicated residential development could increase but it should be limited to specific locations.
- 42% indicated there was adequate or too much commercial development.
- 27% indicated more commercial development was needed but should be limited to specific locations.
- 46.3% felt that Cape Cod needs to protect more open space; 33.3% felt current levels of protection were sufficient.
- 46% reported that there is adequate protection of historic buildings and locations on Cape Cod; 29% said that Barnstable County needs to do a better job of protecting historic sites.
- 75.3% said that water quality in ponds and coastal waters is a serious or moderate problem.
- 80% have a website but only 1/3 sell products over the web.
- 72.2% expressed interest in on-site renewable generation of energy.
- 61.5% currently utilize green/sustainability practices; of these respondents 43.5% would participate in a green certification program.

The full study is available on the Cape Cod Commission web site; follow this link: <http://www.capecodcommission.org> and from the home page, look for the Resource Center. Once there, choose the “Topic” card and select “Economic Data.”





## Chapter 4: CEDS Action Plan

The 5-year Plan outlined a detailed implementation plan for the Cape Cod Commission. The work plan is updated annually. This chapter focuses on:

1. Evaluating progress on the current year's implementation plan;
2. Outlining the implementation plan for the coming year; and
3. Evaluating overall progress using key performance measures.

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

### EVALUATING THE YEAR 3 ACTION PLAN

Successful implementation of the CEDS depends on continued leadership by Barnstable County. The CEDS provides a road map for the Cape Cod Commission economic development priorities for the year. The Year 3 action plan includes the following areas:

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

The following table outlines the status of each task within the current action plan for the Cape Cod Commission in partnership with the CEDS Strategy Committee (Cape Cod EDC).



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Cape Cod Commission / Barnstable County Action Plan Year 3					
Action	Activities	Complete	In progress	Postponed	Comments
Economic Development Planning	• Apply for EDD Status		X		
	• Review Developments of Regional Impact, Local Comprehensive Plans, Growth Incentive Zones and Districts of Critical Planning Concern	X			
	• Coordinate EDC/CEDS Strategy Committee	X			
	• Design & Coordinate Annual CEDS Evaluation	X			
	• Complete CEDS Annual Report	X			
	• Manage short-term planning grant, complete reporting and proposal	X			
Research	• Research White Papers			X	
Outreach	• CEDS Spring Summit – Evaluation	X			
	• Survey Presentations	X			
	• Meet with EDICs	X			
	• Reporting on CEDS activities	X			
Data Dissemination	• Maintain content on STATSCapeCod; Add new resources as available	X			
	• Design Additional Balanced Economy Benchmarks		X		



Cape Cod Commission / Barnstable County Action Plan Year 3					
Action	Activities	Complete	In progress	Postponed	Comments
	<ul style="list-style-type: none"> <li>Census 2010 Detailed Tables</li> </ul>		X		
Regional Priority Projects – Lead	<ul style="list-style-type: none"> <li>Regional Finance Authority</li> </ul>	X			
	<ul style="list-style-type: none"> <li>Complete Economic Centers Cost Analysis</li> </ul>		X		
	<ul style="list-style-type: none"> <li>Waste Minimization</li> </ul>		X		
	<ul style="list-style-type: none"> <li>Strategic Information Office</li> </ul>		X		
	<ul style="list-style-type: none"> <li>Water Quality Center of Excellence</li> </ul>			X	
Regional Priority Projects – Partner	<ul style="list-style-type: none"> <li>Coordinate and assist Regional Priority Project Teams</li> </ul>		X		
	<ul style="list-style-type: none"> <li>Track implementation progress on Regional Priority Projects</li> </ul>		X		
Direct Technical Assistance to Town Economic Centers (RESET)	<ul style="list-style-type: none"> <li>Identify development and redevelopment impediments and opportunities in areas designated for growth on the Regional Land Use Vision Map</li> </ul>	X			

## YEAR 4 ACTION PLAN

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

- Economic Development Planning
- Research



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

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

- Economic Development District - final stages of application completed
- STATSCapeCod – continued development
- Business Survey – analysis and outreach
- Strategic Information Office Priority Project
- Waste Minimization Priority Project
- RESET Technical Assistance to Sandwich

The full plan for CEDS implementation during Year 4 is outlined in the following table. The table is organized by action area and specific tasks therein. The staff person responsible and the duration of the tasks are also included.

Cape Cod Commission / Barnstable County Implementation Plan Year 4					
Action	Activities	Lead	Start Month	End Month	Comments
Economic Development Planning	• Apply for EDD Status	Leslie R.	Ongoing		High Priority
	• Review Developments of Regional Impact, Local Comprehensive Plans, Growth Incentive Zones and Districts of Critical Planning Concern	Leslie R.	Ongoing		Bring ED angle to use of special CCC land use planning and regulatory tools
	• Coordinate EDC/CEDS Strategy Committee	Taree M.	Ongoing		Monthly Meetings; Grant Administration
	• Design & Coordinate Annual CEDS Evaluation	Leslie R.	January	May	Cape-wide conference with partner agencies
	• Complete CEDS Annual Report	Leslie R.	May	June	For continued EDA certification



Cape Cod Commission / Barnstable County Implementation Plan Year 4					
Action	Activities	Lead	Start Month	End Month	Comments
	<ul style="list-style-type: none"> <li>Manage short-term planning grant, complete reporting and proposal</li> </ul>	Leslie R.	Ongoing		Submit grant request
Research	<ul style="list-style-type: none"> <li>Resident Survey</li> </ul>	Leslie R.			Pending Availability of Funds
Outreach	<ul style="list-style-type: none"> <li>CEDS Spring Summit – Evaluation</li> </ul>	Leslie R.	Jan	May	Follow-on of SmarterCape Summit
	<ul style="list-style-type: none"> <li>Survey Presentations</li> </ul>	Sandra P.	July	Dec	Business Survey
	<ul style="list-style-type: none"> <li>Meet with EDICs</li> </ul>	Leslie R.	Twice yearly		Coordinate semi-annual EDIC roundtable discussion
	<ul style="list-style-type: none"> <li>Reporting on CEDS activities</li> </ul>	Leslie R.	Ongoing		EDC reporting throughout the year; at least one visit to CCC and County Commissioners
Data Dissemination	<ul style="list-style-type: none"> <li>Maintain STATSCapeCod</li> </ul>	Ryan E.	Ongoing		Develop maintenance schedule as necessary
	<ul style="list-style-type: none"> <li>Design Additional Content</li> </ul>	Ryan E.	Ongoing		
	<ul style="list-style-type: none"> <li>Census 2010 Detailed Tables</li> </ul>	Ryan E.	Ongoing		Partner with STATS America
Regional Priority Projects – Lead	<ul style="list-style-type: none"> <li>Regional Finance Authority</li> </ul>	Leslie R.	July	June	Follow-up on Recommendation – convene working group
	<ul style="list-style-type: none"> <li>Economic Centers Cost Analysis</li> </ul>	Leslie R.	July	Dec	Convene technical team; design study; conduct study and produce final report
	<ul style="list-style-type: none"> <li>Waste Minimization</li> </ul>	Sandra P.	July	June	Pay-as-you-throw education campaign
	<ul style="list-style-type: none"> <li>Strategic Information Office</li> </ul>	Leslie R.	July	June	IBM Partnership
Regional Priority Projects – Partner	<ul style="list-style-type: none"> <li>Coordinate and assist Regional Priority Project Teams</li> </ul>		July	June	

Cape Cod Commission / Barnstable County Implementation Plan Year 4					
Action	Activities	Lead	Start Month	End Month	Comments
	<ul style="list-style-type: none"> <li>Track implementation progress on Regional Priority Projects</li> </ul>		July	June	
Direct Technical Assistance to Town Economic Centers (RESET)	<ul style="list-style-type: none"> <li>Identify development and redevelopment impediments and opportunities in areas designated for growth on the Regional Land Use Vision Map</li> </ul>	Leslie R.	TBD		Sandwich – South Sandwich Village Redevelopment and Smart Village Development

## CEDS ACTION PLAN MEASURES OF SUCCESS

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

CEDS Process – Measures of Success – Year 3				
Objective	Process/In-put Measures		Outcome Measures	
	Measure	Results	Measure	Results
Capital Investment	# of Grants Submitted: \$\$ of Funds Awarded	3 grants submitted; 3 awarded: CEDS Implementation	\$\$ of Private Investment Leveraged	No new private investment in priority projects
Understanding of ED	# of Presentations given # of Reports published # of Articles written	3 presentations;	TBD	
Strong Partnerships	# of Partnerships # of new Partnerships	7 partnerships;	Formal Partnerships	Barnstable County & Open Cape; Cape Cod Commission & IBM; SmarterCape Partnership



CEDS Process – Measures of Success – Year 3				
Objective	Process/In-put Measures		Outcome Measures	
Easy Access to Information	Progress made on STATSCapeCod	Maps added; site updated	STATSCapeCod user statistics	Visits: 3,316 Unique Visitors: 1,619

CEDS Process – Measures of Success – Goals for Year 4				
Objective	Process/In-put Measures	Goal	Outcome Measures	Goal
Capital Investment	# of Grants Submitted: \$\$ of Funds Awarded	3 grants submitted; 3 awarded; Total funding	\$\$ of Private Investment Leveraged	
Understanding of ED	# of Presentations given # of Reports published # of Articles written	4 presentations; 2 reports published; 4 articles written by ED staff; Executive Director outreach	TBD	
Strong Partnerships	# of Partnerships # of new Partnerships	Long-term goal is 16 partnerships around 16 regional priority projects	Formal Partnerships	Continue existing;
Easy Access to Information	# new dynamic features on STATSCapeCod # new datasets available on STATSCapeCod # new resources posted on STATSCapeCod	Census 2010 Profiles for Cape Towns; ACS profiles for Cape Towns	STATSCapeCod user statistics	Increase by 15%



## Chapter 5: CEDS Regional Priority Projects

### EVALUATION OF THE REGIONAL PRIORITY PROJECTS

Cape Cod Comprehensive Economic Development Strategy (CEDS) stakeholders gathered on May 22, 2012 to plan for Year 4 of CEDS implementation. Over 30 participants, after hearing a briefing on the **region's economy**, categorized and ranked the priority projects for this coming year.

#### ACTIVE AND LISTED REGIONAL PRIORITY PROJECTS

Participating stakeholders in the 2009 CEDS update process identified 16 regional priority projects and added four more projects during the Year 1 evaluation process. Progress was made on many projects with some completed and others continuing to move forward. The projects fall into two categories – active and listed. Active projects are those with lead agencies and either in-kind or grant funding. Listed project are still considered priorities but either do not have a lead agency or are on hold for this year while other projects take precedence. The **stakeholder's** final project categorization is as follows:

Active Projects	Listed Projects
Energy Demand Reduction	ADA & Building Compliance Loan
Entrepreneurship	Buy Local Infrastructure
OpenCape	Coastal Use Templates
Regional Finance Board	Community Green
SmarterCape Initiative: Strategic Information Office	Development in Economic Centers Cost Analysis
Waste Minimization: Reduce, Reuse, Recycle	Emerging Industry Housing
Wastewater in Economic Centers	Capitalize the Cape Cod Fisheries Trust
Canal Area Study	Homeland & Marine Security Testing & Training
	Renewable Energy Generation
	Renewable Energy Testing & Training



## NEW PRIORITY PROJECTS FROM THE SMARTERCAPE SUMMIT

The SmarterCape Summit, a two-day conference in May 2012, was an outgrowth of the CEDS. It was an opportunity to showcase the OpenCape broadband development network that is currently being built and consider how the region can take advantage of this new infrastructure to advance balanced economic development. The SmarterCape Partnership formed for the first summit and then planned the second. The Partnership is made up of the leaders of five organizations:

- Cape Cod Commission
- Cape Cod Economic Development Council
- Cape Cod Chamber of Commerce
- Cape Cod Technology Council
- OpenCape Corporation

The SmarterCape Partnership gathered stakeholders in Fall 2011 to create a SmarterCape vision statement:

***In 2025 Cape Cod is a transformative community that enhances and further develops its innovative and entrepreneurial spirit and culture of creativity through the use of technology and communication while preserving its unique history and natural beauty to create an exceptional place to live, work, and visit.***

Workgroups were formed around seven subject areas with two goals in mind: (1) identify breakout speakers for the SmarterCape Summit, and (2) identify a regional priority project to present at the Summit and, if appropriate, include in the CEDS. The seven groups with their priority projects are listed below followed by summary tables on each project:

- Smarter Development: SmarterVillage Certification Program
- Smarter Economy: SmarterCape Marketing Plan
- Smarter Education: Educational Clearinghouse
- Smarter Environment: Integrated Resource Plan
- Smarter Government: Regional Umbrella Services System (RUSS)



- Smarter Healthcare: (No specific project but continued collaboration)
- Smarter Transportation: Intelligent Transportation Plan

PRIORITY PROJECT SUMMARY	
<b>Project Title</b>	Educational Clearinghouse
<b>Goal of the Project</b>	To harness and synthesize the energy and ingenuity of our youth and the knowledge and experience of our adults to create a knowledge-based, critically thinking workforce and environment that competes in the global economy. Collaborations between government, business, academic, non-profit, and research communities catalyze innovative partnerships for education, research, product and services development, and the creation of new businesses.
<b>Description</b>	A combination of a web portal, database search engine, and live human support that offers educational resources and paths
<b>Overall Project Benefit</b>	Increased awareness of new educational tools that take advantage of advancements in telecommunications and the Internet

PRIORITY PROJECT SUMMARY	
<b>Project Title</b>	Integrated Resource Plan



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<b>Goal of the Project</b>	Our goal is to take advantage of systems thinking to develop a unified, integrated, and adaptive plan for using man-made resources (energy and waste) to build a more sustainable Cape Cod.
<b>Description</b>	The SmarterCape Environment Group recognizes that all of nature's <b>systems are interconnected and</b> that humans are impacted by them as well as impact them. To preserve and protect our natural resources while balancing our needs for economic growth we need to understand how all these systems interact. The connectivity and broadband capacity offered by OpenCape will create new possibilities for us to intelligently understand and plan for the future well-being of our community.
<b>Overall Project Benefit</b>	Understanding how different influences on the economy and the environment work together in order to identify more effective and less expensive solutions to waste management and energy generation

PRIORITY PROJECT SUMMARY	
<b>Project Title</b>	Intelligent Transportation Plan
<b>Goal of the Project</b>	To help improve local air quality by reducing vehicle miles traveled (VMT) and congestion delays as a result of the more efficient use of infrastructure, traveler information systems, and traffic management
<b>Description</b>	<p>Traditional transportation capacity improvements are not desirable for <b>Cape Cod because of the region's</b> unique character and fragile environment. Regional congestion planning relies on making the existing infrastructure more efficient through the use of public transportation and ITS.</p> <p><u>System Elements</u> The 2025 vision for ITS must include the development of a multi-modal and emergency management operations center. These operations</p>



	<p>centers will use the capabilities of the OpenCape broadband network and are proposed to be co-located with the OpenCape network center. In a recent ITS deployment study for Cape Cod<sup>1</sup>, <b>OpenCape was considered a “game changer”</b> for traditional ITS strategies.</p> <p><u>System Components</u> The anticipated principal components of the public system include:</p> <p>Roadway Management – Monitoring the major roads and communicating information about conditions to travelers via highway advisory radio, variable message signs, 511, and the Internet, including smartphone applications.</p> <p>Emergency Management – Supporting transportation safety needs during emergencies and the annual hurricane season (June to November). Complete evacuation during such events is not feasible; the endorsed strategy of emergency planners and responders is instead to assemble residents, seasonal residents, and visitors at designated places of refuge. ITS will help guide those unfamiliar with these locations.</p> <p>Advanced Public Transportation Systems – Improving and communicating information about public transportation to improve the safety and security of transit passengers and employees. <b>OpenCape’s fiber optic cable along the Cape’s regional transit trunk routes will enable “last mile”</b> wireless broadband deployment of mobile and fixed data communication.</p>
<b>Overall Project Benefit</b>	Improved traffic management with less wear and tear on infrastructure

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<sup>1</sup> Cape Cod National Seashore Intelligent Transportation Systems Implementation Plan, March 2011, John A. Volpe National Transportation Systems Center



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PRIORITY PROJECT SUMMARY	
<b>Project Title</b>	Regional Umbrella Services System (RUSS)
<b>Goal of the Project</b>	Development of a Regional Umbrella Services System for the delivery of aggregated telecommunications and technology services, as well as shared applications
<b>Description</b>	<p>A Regional Umbrella Services System (RUSS) is envisioned for Cape Cod to support counties, municipalities, school districts, libraries, and other public sector entities in the development and delivery of regional information technology solutions and services.</p> <p>RUSS will take advantage of the OpenCape Municipal Regional Area Network (Municipal RAN) and Regional Collocation Center (RCC) to enable local and regional public sector entities to aggregate communications service purchasing and develop regional applications. Aggregated services may include Internet and Internet2 access and telephone services. Initial shared regional applications may include a Regional Permitting, Licensing and Inspections Solution (E-Permitting), Regional Geographic Information System (Regional GIS), the Cape Cod Strategic Information Data Warehouse, and Shared Assessor Databases.</p>
<b>Overall Project Benefit</b>	Increased efficiency of services provided by the towns and the county with long-term cost savings

PRIORITY PROJECT SUMMARY	
<b>Project Title</b>	SmarterCape Marketing Plan



<b>Goal of the Project</b>	To work with all sectors of the economy to realize the potential of the new OpenCape broadband middle mile network through a collaborative and integrated plan to market ourselves as the ideal place to live, work, and play.
<b>Description</b>	<p><b>We will explore what's working in other cities</b>, and what we can do to move forward, establish pilot projects, and develop a collaborative marketing plan. Three main areas of focus and some questions to be explored are:</p> <p><b>1 – Improve quality of life</b></p> <p>Partnering to increase the connectivity and efficiency between <b>anchor institutions</b> (that is government, health, schools, and non-profits organizations) - How can we help these organizations to connect effectively? What kind of training will be necessary (for example, RUSS)? What state and federal resources are available to help? <b>Residents</b> – How do we improve the quality of life of existing residents possible through broadband (for example, Cape Cod Community College's <b>Technology for Better Living</b> Conference)?</p> <p><b>2 – Strengthen existing business</b></p> <p>What do we need to compete in the digital economy? How can broadband improve profitability (for example, Convention Data Services)? Can we bring off-Cape businesses who employ Cape residents to set up their business here?</p> <p><b>3 – Attract new business, entrepreneurs, and new industry</b></p> <p>What benefits can we offer so that businesses choose Cape Cod instead of elsewhere? What do entrepreneurs need? How do we become a tech incubator providing capital, mentoring, resources, (building on the Entre Center and Cape Cod</p>



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	Chamber initiatives)? Can we set up an educational partnership (for example, the Digital Media Center in Stratford, Canada)? How can we attract major digital industry (for example, gaming) to the Cape?
<b>Overall Project Benefit</b>	<ul style="list-style-type: none"> <li>• Increased entrepreneurship</li> <li>• New and expanded business development</li> <li>• Globally competitive businesses</li> </ul>

PRIORITY PROJECT SUMMARY	
<b>Project Title</b>	SmarterVillage Certification Program
<b>Goal of the Project</b>	To encourage smart growth and best development practices among developers and policy makers on Cape Cod
<b>Description</b>	A certification program, much like the LEED Neighborhood Design program, that rewards developers and towns with different levels of certification depending on the quality of their development relative to a set of smart growth principles and a set of specific criteria.
<b>Overall Project Benefit</b>	Improved development that is more sensitive to the environment and livability concerns

#### RANKING OF ACTIVE AND NEW PRIORITY PROJECTS

After the SmarterCape Summit, CEDS stakeholders gathered to identify those projects that would be top priority for implementation for Year 4 of the CEDS. The focus was on the active projects and the projects that came out of the SmarterCape Summit. Stakeholders ranked these projects using a prioritization grid in which projects competed with each other to determine an overall hierarchy (see the grid tool at <http://www.successonyourownterms.com/prioritizing-grid>). The stakeholders dropped OpenCape from the ranking process since it is already fully funded and underway. Stakeholders merged Waste



Minimization into the Integrated Resource Plan, which is intended to focus on energy and waste management. Stakeholders merged the Regional Umbrella Services System (RUSS) into the SmarterCape Initiative: Strategic Information Office. The ranking process resulted in the following list of projects in priority order, with some projects being tied:

1. Canal Area Study
2. Wastewater in Economic Centers | Intelligent Transportation Plan
3. SmarterCape Initiative: Strategic Information Office
4. Regional Finance Board
5. Entrepreneurship Capital Access and Training | Integrated Resource Plan | SmarterCape Marketing Plan
6. Energy Demand Reduction
7. Educational Clearinghouse
8. SmarterVillage Certification Program

The results of this process will be included in the CEDS 2012 Annual Report to be completed and approved in June.

#### KEY ACCOMPLISHMENTS OVER PAST YEAR

The projects are listed in alphabetical order and all projects are not included – just those with notable progress to date:

##### Canal Area Assessment & Transportation Improvement

The Canal Area Study will determine the feasibility of rail transport and upgrades to the road system around the Cape Cod Canal and Canal bridges. The Scope of Work has been drafted. The Cape Cod Commission began analyzing the land use impact of Route 6-Exit 1 options.

##### Energy Demand Reduction Program - Energy Efficiency Programs

Cape Light Compact and **the state's** gas and electric utility program administrators received approval for their three-year energy efficiency plan from the Massachusetts Department of Public Utilities on January 29, 2010. The \$1.7 billion statewide plan will deliver energy efficiency services to Massachusetts residents and businesses and is expected to yield energy savings of nearly \$5 billion. The types of programs and





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services offered under the plan include improved energy assessments of **ratepayers' homes and businesses, and incentives for the purchase and** installation of high-efficiency lighting, appliances, heating and air conditioning, insulation, and air sealing. This historic plan will deliver integrated, effective, and measurable savings through energy efficiency programs to citizens, while addressing the challenges of climate change and fostering job growth and economic output within the state.

The third-year program is presently being implemented. The rate-payer funded 2012 Budget is \$26,502,926.

### Entrepreneurship Capital Access and Training Program

The goal of the Entrepreneurship Capital Access and Training Program priority project is to continue to 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.

Over the past year, the Entrepreneur Resource System (ERS) pilot was implemented.

### OpenCape Telecommunication Infrastructure

The National Telecommunications and Information Administration (NTIA) awarded OpenCape Corporation a \$32,072,093 Broadband Technology Opportunity Program (BTOP) grant from American Recovery and Reinvestment Act (ARRA) stimulus funds on February 28, 2010. The BTOP grant will be combined with \$5 million in matching funds from the Commonwealth of Massachusetts, \$2 million from a private construction/operating partner, and a building lease from Barnstable County valued at \$750,000. The funding is being used to construct a comprehensive middle-mile communications network to support the economic, educational, public safety, and governmental needs of southeastern Massachusetts. The project consists of a core fiber optic backbone on Cape Cod with extensions to two major regional network connection centers in Providence and Brockton, a microwave radio **overlay that includes Martha's Vineyard, and a regional collocation center** in Barnstable. These three elements combine to provide a robust, high-capacity communications infrastructure for the region.



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The network will serve approximately 321,204 households, 515,648 individuals, and 62,129 businesses, and will connect more than 70 community anchor institutions to the network as part of its initial build-out, including 12 emergency shelters located in schools, 30 libraries, 5 colleges, 6 academic research facilities, and 18 town or public safety buildings. Collaboration with regional organizations will help the public sector leverage the infrastructure for regional benefit. OpenCape estimates that the project will create more than 200 jobs in the equipment, construction, and manufacturing sectors, as well as an additional 200 indirect jobs. The project will create the necessary underpinning technology infrastructure for Cape Cod to support the growth of its innovation sector and its entrepreneurial culture.

Over the past year, CapeNet and its sub-contractors, ElecComm Corporation (ElecComm) and Hawkeye, began installing the fiber optic cable throughout the region as part of the overall OpenCape project to build a modern telecommunications infrastructure throughout southeastern Massachusetts. OpenCape selected Stateside Construction, which began construction in December 2011 of a regional collocation data center at the Barnstable County government complex and construction of underground conduit in November 2011.

#### Redevelopment Authority – Feasibility Analysis (Regional Finance Board)

The project goal was to complete a feasibility analysis to identify the most appropriate tool to encourage redevelopment in areas designated for growth and redevelopment. The long-term goal is to 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.

The Cape Cod Commission project team completed an analysis of regional redevelopment entities that looked at organizational and financing options, and investigated their scopes of authority under state law. The team also researched Transfer of Development Rights (TDR) as a mechanism to shift development potential and compiled case studies illustrating local/regional approaches that could be applicable to Cape Cod. The staff proposed a Regional Finance Board as the most appropriate model for this region to facilitate development in areas designated for growth.



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### SmarterCape Initiative: Strategic Information Office (Regional Information Clearinghouse)

The purpose of the SmarterCape Strategic Information Office (SIO) is to guide the strategic use of information and information technology for management and policy applications that affect the region. Barnstable County Commissioners formally established the Strategic Information Office this year. The Commissioners appointed the Executive Director of the Cape Cod Commission as SIO Director and provided \$75,000 in start-up funding. Meanwhile the state awarded the Cape Cod Commission and 14 towns plus Nantucket a \$500,000 grant to implement an electronic permitting, licensing, and inspection system to be operated out of the SIO. The first year is the pilot phase where the software vendor will be selected and the program established in three or four municipalities.

### Waste Minimization: Reduce, Reuse, Recycle

The purpose of the Waste Minimization priority project is to establish regional solid waste minimization strategies and best practices intended to extract the maximum practical benefits from products and generate the minimum amount of solid waste. This year the Cape Cod Commission won a \$95,000 grant to hire a Regional Waste Reduction Coordinator who will work closely with the towns to establish pay-as-you-throw programs and help facilitate waste hauler bylaws.

### Wastewater Infrastructure in Economic Centers

The purpose of this priority project is to restore the water quality of near-shore coastal waters by reducing the impact of septic systems by providing wastewater infrastructure. Accomplishing this goal is both complicated and expensive but essential to economic development.

Over the past year, the Cape Cod Commission began development of a computer application to help identify the most scientifically effective and least-costly solution to the wastewater problem for any parcel or set of parcels on the Cape. The **“Watershed MVP” application** will assist with wastewater treatment planning at the local and regional level and help to illustrate the cost savings associated with smart growth concentrated around economic centers and villages.

### KEY MILESTONES FOR NEXT YEAR



The projects are listed in priority order:

#### Canal Area Study

The Canal Area Study rose to the top of the project list because of the spring maintenance program on the Sagamore Bridge which resulted in unprecedented back-ups on all the routes to the bridge. With this renewed interest, the Cape Cod Commission will revisit the draft scope of work, identify immediate steps that could help alleviate problems around the bridges, and work with the funder to determine which elements of this project can move forward.

#### Wastewater in Economic Centers

The Cape Cod Commission will continue to work with towns on wastewater management planning and be prepared to help seek funding for infrastructure development as towns reach the construction phase. The Commission will also complete the Regional Wastewater Management Plan and development of the Watershed MVP application to assist in wastewater planning.

#### Intelligent Transportation Plan

The Cape Cod Commission will finalize the scope of work and meeting with potential funding agencies. The Commission will convene a working group to draft the plan and present it for public review.

#### SmarterCape Initiative: Strategic Information Office (SIO)/Regional Umbrella Services System (RUSS)

With some funding secured, the Cape Cod Commission will officially open and staff the Strategic Information Office (SIO). The SIO will implement the e-permitting pilot project and continue efforts to provide GIS data and services regionally.

#### Regional Finance Board

The Cape Cod Commission will bring the concept of a regional financing board to a committee of public finance experts for their input. The Commission will also bring the proposed structure to several different focus groups to get feedback from key constituencies. Based the



information thus gleaned, the Commission will draft legislation to **establish the board and present it to the Cape's legislative delegation.**

#### Entrepreneurship Capital Access and Training

The Cape Cod Chamber of Commerce and partners will conduct an evaluation of the first year of ERS and will continue to explore sources of funding. They will investigate the feasibility of bricks & mortar incubator service delivery via a state grant and launch the SmarterCape Startup Weekend.

#### Integrated Resource Plan & Waste Minimization Project

The Cape Cod Commission will compile existing resource plans and develop a unified, integrated, and adaptive plan for using man-made resources (energy and waste). The Commission will develop a Systems Model for the Cape Cod Economy. The Regional Waste Reduction Coordinator will provide technical assistance to municipalities on solid waste reduction, conduct a Pay-As-You-Throw (PAYT) educational campaign, and research and help facilitate innovative waste hauler bylaws.

#### SmarterCape Marketing Plan

The SmarterCape Partnership will a draft scope of work to outline the planning process and basic elements of the plan. The Cape Cod Chamber will convene stakeholders, identify resource needs, and lead the planning process. Implementation will begin as soon as possible. One specific project under consideration is an economic development insert to Boston Magazine, which the Cape Cod Commission and partners would author.

#### Energy Demand Reduction

The Cape Light Compact will begin planning for the next three-year planning cycle, 2013-2015.

#### Educational Clearinghouse

The Smarter Education Workgroup will continue to meet, will write a scope of work for this project, and will investigate funding options.

#### SmarterVillage Certification Program



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The SmarterCape Smarter Development Workgroup will need to reconvene to refine the program and seek a sponsor agency for this program. The Cape Cod Commission will assist in organizing the process but cannot host the program.

#### REGIONAL PRIORITY PROJECT SUMMARY TABLE

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

Table Key	
Phase not yet started	Grey
Phase completed	Green
Phase under way	Orange
Year 4 Milestones	Yellow

The table is organized in alphabetical order with the new projects from the SmarterCape Summit in italics.

Project	Description	Lead Agency/ Project Team	Plan	Fund	Build/ Implement	Year 4 Milestones
<b>ADA &amp; Building Compliance Loan Program</b>	Regional revolving loan fund for code compliant renovations in economic centers	<b>TBD</b> Community Development Partnership, Coastal Community Capital, Cape Cod Chamber, Local Chambers, Cape Cod Commission, Cape Cod				<ul style="list-style-type: none"><li>On hold until a partner agency steps up to lead the project</li></ul>



Project	Description	Lead Agency/ Project Team	Plan	Fund	Build/ Implement	Year 4 Milestones
		Economic Development Council				
<b>'Buy Local' Infrastructure Development Program</b>	Investments to encourage and facilitate use of locally produced goods and locally owned businesses	<b>TBD</b> Community Development Partnership, Cape Cod Commission, Sandwich Chamber of Commerce, Hyannis Main Street BID, Cooperative Extension, Cape Cod Hook Fishermen's Association, Cape Cod Chamber of Commerce, Nauset Disposal (We Support Local Business), The Beehive Tavern	<ul style="list-style-type: none"> <li>Under way - variety of programs under way but no centralized planning</li> </ul>	<ul style="list-style-type: none"> <li>Project is seeking funding for activities associated with Regional Umbrella project to leverage support for local programs. Most local programs supported by membership fees.</li> </ul>	<ul style="list-style-type: none"> <li>Developed a 'Buy Fresh Buy Local' Cape Cod website</li> <li>Developed a 'Buy Fresh Buy Local' Cape Cod Buyers Guide</li> <li>Over 2,600 individuals receive a free monthly 'Buy Fresh Buy Local' newsletter</li> <li>Organized and sponsored special local events featuring locally grown food</li> <li>There are now 11 farmers' markets on Cape Cod, up from two a few years ago</li> </ul>	<ul style="list-style-type: none"> <li>Increased membership of both farms and businesses that sell locally produced food</li> <li>Increased 'Buy Fresh Buy Local' newsletter subscriptions and Facebook members</li> <li>Events: Spring and fall tours at members' businesses, dinners with local food, and promotion of cultured shellfish through raw bars at chamber /business events</li> </ul>
<b>Canal Area Assessment &amp; Transportation Improvement</b>	Improved transportation across the Cape Cod Canal focused on rail to facilitate economic development	<b>CCRTA</b> MPO, RTA, Cape Cod Commission, Cape Cod Chamber	<ul style="list-style-type: none"> <li>Scope of Work Drafted</li> </ul>	<ul style="list-style-type: none"> <li>Project postponed by funder</li> </ul>		<ul style="list-style-type: none"> <li>Finalize Scope of Work</li> <li>Convene working group</li> <li>Identify land use impact of Exit 1 options</li> </ul>
<b>Capitalize the Cape Cod Fisheries Trust</b>	Fund the purchase of fishing rights for local fishermen	<b>Cape Cod Fisheries Trust</b> Hook Fishermen's Association, Amplifier Strategies, Cape Cod	<ul style="list-style-type: none"> <li>Completed</li> </ul>	<ul style="list-style-type: none"> <li><b>Proposal Submitted to EDA March 2010</b></li> <li><b>Proposal denied July 2010</b></li> <li>CCFT is</li> </ul>	<ul style="list-style-type: none"> <li>Implementation is under way with existing funding commitments</li> <li>Identified triple bottom line and metrics of</li> </ul>	<ul style="list-style-type: none"> <li>Project continues with formal partnership between the Fisheries Trust and the Community</li> </ul>



Project	Description	Lead Agency/ Project Team	Plan	Fund	Build/ Implement	Year 4 Milestones
		Commission, Community Development Partnership, Mass Development		securing funding from other private sources (smaller amounts than requested from EDA)	success • Built political support • Purchase 5% of dayboat scallop quota (max- imum allowed); lease 100% of quota back to fishermen	Development Partnership for management of the project • Mechanism for new entrants • Raise remaining capital
<b>Coastal Use Templates for Economic Development</b>	Develop a series of options for coastal development and redevelopment that will leverage the summer season to provide employment and business opportunities year-round and reinforce the Cape's historic connection to the sea	<b>Cape Cod Commission</b> Towns including Planners, Harbor Masters, Shellfish Wardens, etc.; APCC/Business Roundtable	• Completed	• CCC & EDC	• Completed Phase 1 report	• Determine if need for Phase 2 Report
<b>Community Green Enterprise Center Design &amp; Construction</b>	Design and build Community Green Enterprise Center	<b>Housing Assistance Corporation</b>	• Completed	• Funding secured for housing for employment clients • Funding secured for initial employment staff • Wastewater agreement reached with state, town and developer and funds secured	• Part of the job training program has begun with a shares sold, and crops produced and sold last year • Curio (zero net energy) House completed, tested and occupied • Equipment storage barn built, irrigation system built for second phase of garden	• Funding app submitted for SRO's but turned down, will resubmit in July • Livestock in the process of being introduced this year as part of the job training program





Project	Description	Lead Agency/ Project Team	Plan	Fund	Build/ Implement	Year 4 Milestones
<b>Development in Economic Centers - Cost Analysis</b>	Development cost analysis by location to identify factors that shift growth to economic centers and reduce the higher infrastructure costs associated with sprawl	<b>APCC Business Roundtable</b> Cape Cod Commission	<ul style="list-style-type: none"> <li>Implementation Plan Completed</li> </ul>	<ul style="list-style-type: none"> <li>CCC &amp; EDC</li> </ul>	<ul style="list-style-type: none"> <li>Secondary research phase concluded</li> </ul>	<ul style="list-style-type: none"> <li>Project on hold</li> </ul>
<b>Educational Clearinghouse</b>	<i>A combination of a web portal, database search engine, and live human support that offers educational resources and paths</i>	<b>Smarter Education Committee</b>				<ul style="list-style-type: none"> <li>Draft Scope of Work</li> <li>Seek funding opportunities</li> </ul>
<b>Energy Demand Reduction Program - Greening Existing Buildings</b>	Reduction in energy demand through expansion of existing energy efficiency assistance programs	<b>Cape Light Compact</b> Program Administrators, MA Energy Efficiency Advisory Council, MA Dept. of Public Utilities	<ul style="list-style-type: none"> <li>Completed</li> </ul>	<ul style="list-style-type: none"> <li>Rate-Payer Funded 2012 Budget \$26,502,926</li> </ul>	<ul style="list-style-type: none"> <li>Three-year Energy Efficiency Plan Approved and Third year Program presently being implemented</li> </ul>	<ul style="list-style-type: none"> <li>Begin Planning for next three-year planning cycle, 2013-2015</li> </ul>
	Historic structures retrofit for energy efficiency demonstration project	<b>TBD</b> Cape Cod Commission, Cape Light Compact, MA Historic				<ul style="list-style-type: none"> <li>Project on hold</li> </ul>
<b>Entrepreneurship Capital Access &amp; Training Program</b>	Entrepreneurship training	<b>Cape Cod Chamber</b> RTDC, Coastal Community Capital, C&I WIB, Community College, Cape Cod Commission, SCORE, SBDC, David Curtis, Peter Karlson	<ul style="list-style-type: none"> <li>Completed</li> </ul>	<ul style="list-style-type: none"> <li>Applied to EDC for seed funding Fall 2010 (denied)</li> <li>Applied to EDC as part of its Spring 2011 grant program (denied)</li> <li>Matching funds (both cash and in-kind) from Chamber of Commerce and other partners. Regional Economic Development Organization State (REDO) \$</li> </ul>	<ul style="list-style-type: none"> <li>Entrepreneur Resource System (ERS) Pilot Underway</li> </ul>	<ul style="list-style-type: none"> <li>Conduct first year evaluation of ERS</li> <li>Continue to explore sources of funding</li> <li>Investigate feasibility of bricks &amp; mortar incubator service delivery via state grant</li> <li>Launch SmarterCape Startup Weekend</li> </ul>



Project	Description	Lead Agency/ Project Team	Plan	Fund	Build/ Implement	Year 4 Milestones
<b>Homeland Security &amp; Marine Security Technology Testing &amp; Training Center</b>	Establish a Homeland Security Center on the MA Military Reservation (MMR)	<b>TBD</b>				<ul style="list-style-type: none"> <li>On hold until a partner agency steps up to lead the project</li> </ul>
<b>Integrated Resource Plan</b>	<i>Plan looking at integration between energy and waste; systems dynamics</i>	<b>Cape Cod Commission</b>	<ul style="list-style-type: none"> <li>Regional Wastewater Management Plan in draft</li> </ul>	<ul style="list-style-type: none"> <li>CCC</li> <li>State of MA</li> <li>EDC</li> </ul>	<ul style="list-style-type: none"> <li>Watershed MVP under development to help with wastewater planning</li> </ul>	<ul style="list-style-type: none"> <li>Finish Wastewater Management Plan</li> <li>Watershed MVP ready for use by towns</li> </ul>
<b>Intelligent Transportation Plan</b>	<i>Plan for the implementation of smart transportation systems throughout the transportation network</i>	<b>Cape Cod Commission</b>	<ul style="list-style-type: none"> <li>Draft Scope of Work</li> </ul>			<ul style="list-style-type: none"> <li>Finalize Scope of Work</li> <li>Convene working group</li> <li>Complete plan and public process</li> <li>Begin implementation</li> </ul>
<b>OpenCape Telecommunication Infrastructure</b>	Establish an open access fiber and wireless backhaul network; establish a regional data center	<b>OpenCape Corporation</b> Barnstable County Towns CapeNet	<ul style="list-style-type: none"> <li>Completed</li> </ul>	<ul style="list-style-type: none"> <li>\$39,072,093 Cash</li> <li>\$1,083,339 In-kind</li> </ul>	<ul style="list-style-type: none"> <li>Network build under way</li> <li>Renovation of Data Center under way</li> </ul>	<ul style="list-style-type: none"> <li>Completion of the network and the data center – both in operation</li> </ul>
<b>Redevelopment Authority - Feasibility Analysis</b>	Feasibility analysis of regional redevelopment instruments	<b>APCC Business Roundtable</b> Cape Cod Commission Town of Barnstable Yarmouth Chamber of Commerce	<ul style="list-style-type: none"> <li>Draft study completed March 2012; comments accepted until June 2012; final study anticipated July 2012</li> </ul>	<ul style="list-style-type: none"> <li>CCC &amp; EDC</li> </ul>	<ul style="list-style-type: none"> <li>Completed research including: <ul style="list-style-type: none"> <li>organizational options/ authority under MA state law</li> <li>case studies illustrating local/regional approaches</li> <li>financing options</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Finalize report on feasibility</li> <li>Send final report to BRT</li> <li>Convene expert review committee</li> <li>Draft legislation as appropriate</li> </ul>
<b>Regional Umbrella Services System (RUSS)</b>	<i>System for delivery of aggregated software and technology services</i>	<b>Cape Cod Commission</b> Barnstable County OpenCape Towns	<ul style="list-style-type: none"> <li>Proposal for e-permitting</li> <li>E-permitting RFP</li> </ul>	<ul style="list-style-type: none"> <li>Received a grant of \$500,000 from the state for e-permitting</li> </ul>	<ul style="list-style-type: none"> <li>Under way – pilot due to be completed in December 2012</li> </ul>	<ul style="list-style-type: none"> <li>Implementation of an e-permitting system serving three pilot towns</li> </ul>



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Project	Description	Lead Agency/ Project Team	Plan	Fund	Build/ Implement	Year 4 Milestones
<b>Renewable Energy Generation Program</b>	Algae bio-fuel refinery pilot project	<b>Cape Cod Commission</b> Barnstable County MMR WHOI/MBL Plankton Inc. New England Biofuels State of MA	<ul style="list-style-type: none"> <li>Completed</li> </ul>	<ul style="list-style-type: none"> <li>Project team seeking grant and venture funding</li> </ul>	<ul style="list-style-type: none"> <li>Marine Biofuel Research Center at WHOI is open</li> </ul>	<ul style="list-style-type: none"> <li>Reconvene the Renewable Fuels Partnership</li> </ul>
	Ocean Energy planning framework to promote coordinated and environmentally sound development	Cape Cod Commission CIRENEW Cape Light Compact Self-Reliance WeeInfo UMass WHOI/MBL Energy Service Cos. Old Colony	<ul style="list-style-type: none"> <li>DCPC &amp; Ocean Management Plan Planning Phase Completed</li> </ul>	<ul style="list-style-type: none"> <li>CCC</li> <li>Provincetown Center for Coastal Studies applying for grant from Island Foundation to assist in development of technical bulletin</li> </ul>	<ul style="list-style-type: none"> <li>Ocean Management Plan adopted</li> <li>CCC adopted the Visual Impact Assessment Technical Bulletin in May 2012</li> </ul>	<ul style="list-style-type: none"> <li>Regional Policy Plan updates and/or changes will be reviewed by the Assembly of Delegates</li> </ul>
<b>Renewable Energy Testing &amp; Training Center</b>	Testing & training around renewable energy priorities	WEeInfo Services, Cape & Islands Self-Reliance, Cape Cod Community College, & Others	<ul style="list-style-type: none"> <li>Qualifications to Offer Building Performance Institute (BPI) Courses &amp; State Incentives Achieved</li> <li>Plans for Offshore Wind Education, Training &amp; Certification Programs Developed</li> </ul>	<ul style="list-style-type: none"> <li>Pursuing funding to develop curriculum for introductory course on offshore wind</li> <li>Pursuing funding to launch training and certification program for offshore wind operations and maintenance technicians</li> </ul>	<ul style="list-style-type: none"> <li>BPI training courses offered regularly addressing building envelope and heating system issues</li> </ul>	<ul style="list-style-type: none"> <li>Launch offshore wind education and training programs</li> </ul>
<b>SmarterCape Initiative: Strategic Information Office &amp; Center of Excellence for Water Quality Technologies &amp; Innovation</b>	Establish a Regional Information Clearinghouse (Strategic Information office) to centralize regional data using innovative communications technology	<b>Cape Cod Commission</b> IBM SMASST-UMass Dartmouth Center for Coastal Studies WEBNER MA DEP	<ul style="list-style-type: none"> <li>Completed</li> </ul>	<ul style="list-style-type: none"> <li>SIO established by the County and \$500,000 for E-permitting pilot awarded by the State</li> </ul>	<ul style="list-style-type: none"> <li>Writing RFP for e-permitting vendor procurement and identifying pilot towns</li> </ul>	<ul style="list-style-type: none"> <li>Implement e-permitting pilot</li> </ul>
	Establish a Center of Excellence for Water Quality Technologies & Innovation	<b>RTDC</b> Cape Cod Commission MBL WHOI	<ul style="list-style-type: none"> <li>Scoped project; hosted a planning and idea generation workshop</li> </ul>	<ul style="list-style-type: none"> <li>Small Planning Grant Proposal Pending (denied)</li> </ul>		<ul style="list-style-type: none"> <li>On hold</li> </ul>



Project	Description	Lead Agency/ Project Team	Plan	Fund	Build/ Implement	Year 4 Milestones
<b>SmarterCape Marketing Plan</b>	<i>To realize the potential of OpenCape through a collaborative and integrated marketing plan</i>	<b>Cape Cod Chamber</b> Cape Cod Commission				<ul style="list-style-type: none"> <li>• Scope of Work</li> <li>• Draft Marketing Plan</li> <li>• Complete Boston Magazine Insert</li> <li>• Begin plan implementation</li> </ul>
<b>Smarter Village Certification Program</b>	<i>Certification program to encourage smart growth and best development practices among developers and policy makers</i>	<b>TBD</b>				<ul style="list-style-type: none"> <li>• Identify agency to administer certification program</li> <li>• Finalize certification parameters</li> <li>• Initiate program</li> </ul>
<b>Specialized 4-year College - Feasibility Analysis</b>	Establish an independent or affiliated undergraduate institution	<b>TBD</b> Cape Cod Community College MMA WHOI MBL Cape Cod Chamber Hyannis BID Highlands Center Mass Development Delegations RTDC National Graduate School	<ul style="list-style-type: none"> <li>• Smarter Cape Summit Workshops</li> </ul>			<ul style="list-style-type: none"> <li>• On hold until a partner agency steps up to lead the project</li> </ul>
<b>Wastewater Infrastructure in Economic Centers</b>	Design and build wastewater infrastructure designated for mixed-use development and redevelopment where density is desired	<b>Cape Cod Commission</b> Town of Yarmouth Town of Harwich Town of Sandwich Town of Bourne	<ul style="list-style-type: none"> <li>• Sandwich Comprehensive Wastewater Master Plan</li> <li>• Yarmouth Build-out</li> <li>• Bourne Wastewater Planning for Buzzards Bay</li> </ul>	<ul style="list-style-type: none"> <li>• Planning funded through CCC, District Local Technical Assistance, and towns</li> </ul>		<ul style="list-style-type: none"> <li>• Completed Regional Wastewater Management Plan and Watershed MVP</li> <li>• Seek funding from EDA for Buzzards Bay Project if ready</li> </ul>
<b>Waste Minimization: Reduce, Reuse, Recycle</b>	To establish regional solid waste minimization strategies and best management practices	<b>Cape Cod Commission</b> CIRenew CC Cooperative Extension Self-Reliance Alice Boyd, Brian Braginton-Smith, Christina Rawley	<ul style="list-style-type: none"> <li>• Completed</li> </ul>	<ul style="list-style-type: none"> <li>• \$95,000 grant from DEP</li> </ul>	<ul style="list-style-type: none"> <li>• Regional Waste Reduction Coordinator hired – started April 23rd</li> </ul>	<ul style="list-style-type: none"> <li>• Provide technical assistance to municipalities on waste reduction</li> <li>• Pay As You Throw educational campaign</li> </ul>



## LOCAL PRIORITY PROJECTS

Local capital projects are included in the CEDS to enable towns in the region to seek support from the EDA. Projects can be short-term or longer-term projects currently under discussion or in the earlier phases of design.

### TOWN OF BARNSTABLE

<b>Project Title</b>	Hyannis Arts Center at the Armory and Kennedy Presidential Acceptance Speech Memorial
<b>Goal of the Project</b>	Enhance year-round economic activity and quality of life in Downtown Hyannis, a Growth Incentive Zone, and create a significant venue for regional arts and culture activity. The Hyannis Arts Center at the Armory is the centerpiece component of the Hyannis Arts District.
<b>Description</b>	<p>Phased rehabilitation and adaptive reuse of the existing Armory building to house a multi-use arts center. Hyannis Arts Center will be designed to support multiple uses for performing and visual arts. The soaring ceilings and open structure allow exhibits of large artworks, multimedia events, and performing and visual arts exhibits, and also serve as meeting space for several hundred attendees.</p> <p>Entry lobby area will become an interactive multimedia memorial to the Kennedy Presidential Acceptance Speech event of November 9, 1960. This video clip chronicles this event: <a href="http://www.youtube.com/watch?v=8DvBSM99eKQ">http://www.youtube.com/watch?v=8DvBSM99eKQ</a>.</p> <p>The town has grant funds in place from the Massachusetts Cultural Facilities Fund and the Cape Cod Economic Development Council to perform a thorough professional analysis of the existing structure to determine rehab needs, acoustic and lighting requirements, and a detailed project budget for each proposed phase. This work will begin in a few months.</p> <p>Phase I is anticipated to be the installation of the Kennedy Presidential Acceptance Memorial in the Armory entry lobby. As a complementary project, the Town is working with the JFK Museum board and other partners to implement a Kennedy Legacy Trail in Downtown Hyannis. The Armory is a feature on the trail. An interpretative plaque at the Armory building entrance will be installed with implementation of the trail even in advance of the</p>



	<p>Armory rehabilitation and re-opening. This will help establish the Armory as a destination and attract positive attention to the project.</p> <p>Phase II is planned to accomplish building rehabilitation and systems upgrades to allow programming in the large assembly hall. This phase would also include upgrades to restrooms and kitchen facilities.</p> <p>Phase III as planned will reuse attached accessory space in the lower level to the rear of the Armory as artist workspace, thereby completing the project.</p>
<b>Overall Project Benefits</b>	<p>Enhance resident and visitor year-round experience and quality of life in Downtown Hyannis; establish Hyannis, the central urban area of Cape Cod, as a regional arts and culture destination; augment the visibility and attractiveness of the Kennedy Legacy as it relates to Hyannis and Cape Cod.</p>
<b>Estimated Job Creation</b>	<p>Construction: TBD</p> <p>Permanent: +/- 5 FTE for physical plant and programming. Ancillary job creation anticipated as events programming and workspace uses come online.</p>
<b>Measures of Success</b>	<p>Quantitative:</p> <p>Immediate – Completion of building assessment, phasing plan with detailed budget for reach phase and initial concept for memorial.</p> <p>Long Term – Rehabilitation of the Armory to establish a regional arts and culture center as a year-round local and regional resource for artists, musicians, performers, and students and as an attraction for visitors and residents.</p> <p>Qualitative:</p> <p>Immediate – Renewed interest in Kennedy Legacy as it relates to Hyannis. Barnstable Growth Management Department currently preparing MCC Cultural District Designation Application to be submitted in early summer with good results anticipated. This designation in concert with interest generated by the Armory assessment and Kennedy Trail will bring a positive focus to Hyannis and inspire support for the future use of the property.</p> <p>Long Term – Full build out of the project yields an</p>



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	important year-round resource and attraction for Hyannis and the region. The unique combination of history, arts, and culture under one roof connecting the urban core of Hyannis to Hyannis Harbor is compelling and appealing to diverse groups and individuals, ensuring the project's success.		
<b>Estimated Duration</b>	Initial building assessment to be completed by October 2011. Project timeline will then develop.		
<b>Estimated Total Cost</b>	TBD	Public Share: TBD	Private Share: TBD

<b>Project Title</b>	Hyannis Downtown Water Supply & Wastewater Infrastructure Improvements (Note: This project was also on the 2009 CEDS Local Capital Projects list.)
<b>Description</b>	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
<b>Estimated Total Cost</b>	\$31.7 M

<b>Project Title</b>	Airport Rotary Re-design (Note: This project was also on the 2009 CEDS Local Capital Projects list.)
<b>Description</b>	Design and construction of connectivity, capacity, and safety improvements to benefit motorists, pedestrians, cyclists, and freight movements in the north/eastern area of Hyannis. Hyannis is the major commercial and transportation center of Cape Cod (includes major facilities such as Cape Cod Hospital, Steamship Authority docks, Barnstable Municipal Airport, Hyannis Transportation Center, rail terminus, and many business and attractions in an historic downtown area). Access routes within the Hyannis core have long suffered from severe congestion and safety problems. Other constraints on mobility include non-existent bicycle connections and inadequate means of facilitating freight movements. The Hyannis Gateway project was born from the Hyannis Access Study – a multi-





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	year, highly publicized, and publicly participated effort undertaken by the Executive Office of Transportation. Project elements are referenced in the Cape Cod Regional Transportation Plan and have broad support from many community leaders.
<b>Estimated Total Cost</b>	\$58 M

<b>Project Title</b>	Barnstable Harbor Bulkhead Repairs (Note: This project was also on the 2009 CEDS Local Capital Projects list.)
<b>Description</b>	Reconstruct the bulkhead around Barnstable Harbor which has collapsed. Barnstable Harbor support commercial and sport fishing, whale watching and other cruises, and is home to a boatyard, fish market, restaurant, boat launch, and offices.
<b>Estimated Total Cost</b>	TBD

<b>Project Title</b>	Hyannis Downtown Transportation Improvements & Cultural Center (Note: This project was also on the 2009 CEDS Local Capital Projects list.)
<b>Description</b>	Expanded and improved cultural and transportation facilities including improvements to access roads and main street, construction of a parking garage and other parking improvements, and construction of a cultural center with park improvements
<b>Estimated Total Cost</b>	\$85 M

#### TOWN OF CHATHAM

<b>Project Title</b>	Wastewater Implementation – Commercial Areas (Note: This project was also on the 2009 CEDS Local Capital Projects list.)
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<b>Description</b>	This project is Phase 1 of the town-wide Comprehensive Wastewater Management Plan and includes expansion and improvement of the Town of Chatham Wastewater Treatment Facility (WWTF) to comply with the nitrogen Total Maximum Daily Load (TMDL) limits.
<b>Estimated Total Cost</b>	\$59.5 M

<b>Project Title</b>	Chatham Wastewater Facility Plan & Implementation (Note: This project was also on the 2009 CEDS Local Capital Projects list.)
<b>Description</b>	Completion of a wastewater facility capacity analysis, design, construction, sewer extensions, and wind power generation
<b>Estimated Total Cost</b>	\$55 M

TOWN OF DENNIS

<b>Project Title</b>	Depot Street Sidewalks from Upper County Road to Mill Street
<b>Goal of the Project</b>	Upgrade north/south sidewalk connection between higher density housing along Upper County Road and the Main Street area of Dennisport.
<b>Description</b>	Upgrade existing sidewalks, fill in gaps, reset curbs and reestablish curb cuts.
<b>Overall Project Benefits</b>	The project is a part of an overall economic development strategy for the Village of Dennisport. The sidewalk serves as a principal connection to several vital land uses in the village center.
<b>Estimated Job Creation</b>	Construction:
	Permanent: The Dennisport Village Center redevelopment strategy could create up to 180 new jobs in the village.
<b>Measures of Success</b>	Quantitative: Increased numbers of pedestrians visiting downtown Dennisport.



	Qualitative: Improved pedestrian access.		
<b>Estimated Duration</b>			
<b>Estimated Total Cost</b>	\$85,000	Public Share: \$85,000	Private Share:

<b>Project Title</b>	Division Street Sidewalks, from North Street to Hall Street		
<b>Goal of the Project</b>	Upgrade pedestrian facilities along one of the primary north/south connections in the Dennisport Village Center.		
<b>Description</b>	Upgrade existing sidewalks, fill in gaps, reset curbs, and reestablish curb cuts.		
<b>Overall Project Benefits</b>	The project is a part of an overall economic development strategy for the Village of Dennisport. The sidewalk serves as one of two north/south connections in the downtown.		
<b>Estimated Job Creation</b>	Construction:		
	Permanent: The Dennisport Village Center redevelopment strategy could create up to 180 new jobs in the village.		
<b>Measures of Success</b>	Quantitative: Increased numbers of pedestrians visiting downtown Dennisport.		
	Qualitative: Improved pedestrian access.		
<b>Estimated Duration</b>			
<b>Estimated Total Cost</b>	\$81,000	Public Share: \$81,000	Private Share:

<b>Project Title</b>	Edwards Avenue Sidewalks from Main Street to Hall Street		
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<b>Goal of the Project</b>	Upgrade pedestrian facilities alongside Dennis Public Library.		
<b>Description</b>	Upgrade existing sidewalks, fill in gaps, reset curbs, and reestablish curb cuts.		
<b>Overall Project Benefits</b>	The project is a part of an overall economic development strategy for the Village of Dennisport. The sidewalk serves as a principal connection to several vital land uses in the village center.		
<b>Estimated Job Creation</b>	Construction:		
	Permanent: The Dennisport Village Center redevelopment strategy could create up to 180 new jobs in the village.		
<b>Measures of Success</b>	Quantitative: Increased numbers of pedestrians visiting downtown Dennisport.		
	Qualitative: Improved pedestrian access.		
<b>Estimated Duration</b>			
<b>Estimated Total Cost</b>	\$17,000	Public Share: \$17,000	Private Share:

<b>Project Title</b>	Hall Street Parking Improvements
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<b>Goal of the Project</b>	Increase available parking for the village and Mike Stacey Park.		
<b>Description</b>	Along with upgrading sidewalks in this area, adding additional parking is a consideration. This would require addressing roadway circulation issues addressed as a separate project, as well as ensuring adequate design accommodations. Parking along this stretch of roadway will allow for increased parking for village businesses, park, and library users.		
<b>Overall Project Benefits</b>	The project is a part of an overall economic development strategy for the Village of Dennisport. The street serves as a principal access to downtown stores, the town library, and Mike Stacey Park.		
<b>Estimated Job Creation</b>	Construction:		
	Permanent: The Dennisport Village Center redevelopment strategy could create up to 180 new jobs in the village.		
<b>Measures of Success</b>	Quantitative: Increased numbers of pedestrians visiting downtown Dennisport, Mike Stacey Park and the Library.		
	Qualitative: More visitors to the village and the park.		
<b>Estimated Duration</b>			
<b>Estimated Total Cost</b>	\$150,000	Public Share:	Private Share:

<b>Project Title</b>	Hall Street Sidewalks from Division Street to Edwards Avenue
<b>Goal of the Project</b>	Upgrade pedestrian facilities along “back” access to village stores, town parking lot, Dennis Public Library, and downtown park.
<b>Description</b>	Upgrade existing sidewalks, fill in gaps, reset curbs, and reestablish curb cuts.
<b>Overall Project Benefits</b>	The project is a part of an overall economic development strategy for the Village of Dennisport. The sidewalk serves as a principal connection to several vital land uses in the village center.



<b>Estimated Job Creation</b>	Construction:		
	Permanent: The Dennisport Village Center redevelopment strategy could create up to 180 new jobs in the village.		
<b>Measures of Success</b>	Quantitative: Increased numbers of pedestrians visiting downtown Dennisport.		
	Qualitative: Improved pedestrian access.		
<b>Estimated Duration</b>			
<b>Estimated Total Cost</b>	\$44,000	Public Share: \$44,000	Private Share:

<b>Project Title</b>	Hall Street Traffic Improvements
<b>Goal of the Project</b>	Improved traffic circulation, reduced traffic congestion.
<b>Description</b>	Make Hall Street one-way from Edwards Avenue to Division Street, to relieve traffic congestion at the Edwards Avenue, Telegraph Road, Main Street intersection. Improvements will allow for wider sidewalks than identified in the Hall Street Sidewalk project, and for more parking than would be capable of being accomplished within the Hall Street parking proposal.
<b>Overall Project Benefits</b>	The project is a part of an overall economic development strategy for the Village of Dennisport. Hall Street connects the Library to downtown parking and Mike Stacey Park. The one-way project will reduce traffic congestion and improve overall access to the village.
<b>Estimated Job Creation</b>	Construction:
	Permanent: The Dennisport Village Center redevelopment strategy could create up to 180 new jobs in the village.
<b>Measures of Success</b>	Quantitative: Reduced traffic congestion in downtown Dennisport. Reduced congestion and accidents at the Edwards Avenue, Telegraph Road, Main Street intersection.
	Qualitative: Reduced traffic queues.



<b>Estimated Duration</b>			
<b>Estimated Total Cost</b>	\$250,000	Public Share:	Private Share:

<b>Project Title</b>	Main Street and Depot Street Safety Improvements		
<b>Goal of the Project</b>	Reduce vehicle accidents.		
<b>Description</b>	Improve visibility at the intersection, reestablish curb cuts at the intersection, and erect warning signs regarding turning and stopped traffic.		
<b>Overall Project Benefits</b>	The project is a part of an overall economic development strategy for the Village of Dennisport. The intersection is one of several that provide access between Main Street (Route 28) and Dennis beaches. Safety improvements will reduce congestion in the village and improve access to the village and Dennis Beaches.		
<b>Estimated Job Creation</b>	Construction:		
	Permanent: The Dennisport Village Center redevelopment strategy could create up to 180 new jobs in the village.		
<b>Measures of Success</b>	Quantitative: Reduced number of accidents at the intersection.		
	Qualitative: Improved safety.		
<b>Estimated Duration</b>			
<b>Estimated Total Cost</b>	\$150,000	Public Share:	Private Share:

<b>Project Title</b>	Main Street Sidewalks, from Sea Street to Holiday Hill		
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<b>Goal of the Project</b>	Upgrade pedestrian facilities adjacent to the Dennisport Village Center to connect area businesses to the village.		
<b>Description</b>	Upgrade existing sidewalks and fill in gaps, reset curbs, and reestablish curb cuts. Make the entire area ADA accessible.		
<b>Overall Project Benefits</b>	The project is a part of an overall economic development strategy for the Village of Dennisport. The sidewalk serves to connect several commercial properties and hotels to the village area.		
<b>Estimated Job Creation</b>	Construction:		
	Permanent: The Dennisport Village Center redevelopment strategy could create up to 180 new jobs in the village.		
<b>Measures of Success</b>	Quantitative: Increased numbers of pedestrians visiting downtown Dennisport.		
	Qualitative: Improved pedestrian access.		
<b>Estimated Duration</b>			
<b>Estimated Total Cost</b>	\$132,000	Public Share: \$132,000	Private Share:

<b>Project Title</b>	Sidewalk Improvements, Main Street, from the Harwich Town Line to Telegraph Road		
<b>Goal of the Project</b>	Upgrade pedestrian facilities in the Dennisport Village Center to make the area more attractive and accessible.		
<b>Description</b>	Upgrade existing sidewalks, remove existing brick walkway and replace it with asphalt or etched asphalt. Create appropriate tree openings and grates, replace dead trees, reset curbs.		
<b>Overall Project Benefits</b>	The project is a part of an overall economic development strategy for the Village of Dennisport. The sidewalk serves as the principal access to downtown stores and connects to village parking and the town library.		
<b>Estimated Job Creation</b>	Construction:		



	Permanent: The Dennisport Village Center redevelopment strategy could create up to 180 new jobs in the village.		
<b>Measures of Success</b>	Quantitative: Increased numbers of pedestrians visiting downtown Dennisport.		
	Qualitative: Improved pedestrian access.		
<b>Estimated Duration</b>			
<b>Estimated Total Cost</b>	\$51,000	Public Share: \$51,000	Private Share:

<b>Project Title</b>	Main Street Sidewalks, from Telegraph Road to Sea Street		
<b>Goal of the Project</b>	Upgrade pedestrian facilities in the Dennisport Village Center to make the area more attractive and accessible.		
<b>Description</b>	Upgrade existing asphalt sidewalks to make them ADA compliant. Create appropriate tree openings and grates, replace dead trees, reset curbs, and curb cuts.		
<b>Overall Project Benefits</b>	The project is a part of an overall economic development strategy for the Village of Dennisport. The sidewalk serves as the backbone of the area between the village center and the Dennisport Post Office. The stretch included the Dennis Public Library, several restaurant uses, and rental housing sites.		
<b>Estimated Job Creation</b>	Construction:		
	Permanent: The Dennisport Village Center redevelopment strategy could create up to 180 new jobs in the village.		
<b>Measures of Success</b>	Quantitative: Increased numbers of pedestrians visiting downtown Dennisport. Improved property values along the stretch of roadway, and reinvestment in several deteriorating structures.		
	Qualitative: Improved pedestrian access.		
<b>Estimated Duration</b>			





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<b>Estimated Total Cost</b>	\$91,000	Public Share: \$91,000	Private Share:
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<b>Project Title</b>	Mike Stacey Park Recreational Improvements		
<b>Goal of the Project</b>	Expand recreational opportunities for all ages at Mike Stacey Park.		
<b>Description</b>	Expand upon currently programmed improvements at Mike Stacey Park to create ADA-compliant trails and activities for all ages at the park; this could include picnic areas, walking trails, and features similar to those at Johnny Kelley Park.		
<b>Overall Project Benefit</b>	The project is a part of an overall economic development strategy for the Village of Dennisport. The park serves as the principal recreational area for downtown residents, many of whom are in lower income brackets.		
<b>Estimated Job Creation</b>	Construction:		
	Permanent: The Dennisport Village Center redevelopment strategy could create up to 180 new jobs in the village.		
<b>Measures of Success</b>	Quantitative: Increased available facilities for residents of Dennisport Village Center.		
	Qualitative: Improved quality of life, making the village a more desirable location to live.		
<b>Estimated Duration</b>			
<b>Estimated Total Cost</b>	\$250,000	Public Share: TBD could be part of the proposed District Improvement Financing (DIF)	Private Share: TBD

<b>Project Title</b>	Sea Street Sidewalks from Main Street to Upper County Road
<b>Goal of the Project</b>	Upgrade north/south sidewalk connection between higher density housing along Upper County Road and Main Street.



<b>Description</b>	Upgrade existing sidewalks, fill in gaps, reset curbs, and reestablish curb cuts.		
<b>Overall Project Benefit</b>	The project is a part of an overall economic development strategy for the Village of Dennisport. The sidewalk serves as a principal connection to several vital land uses in the village center.		
<b>Estimated Job Creation</b>	Construction:		
	Permanent: The Dennisport Village Center redevelopment strategy could create up to 180 new jobs in the village.		
<b>Measures of Success</b>	Quantitative: Increased numbers of pedestrians visiting downtown Dennisport.		
	Qualitative: Improved pedestrian access.		
<b>Estimated Duration</b>			
<b>Estimated Total Cost</b>	\$76,000	Public Share: \$76,000	Private Share:

<b>Project Title</b>	Sidewalk Amenities		
<b>Goal of the Project</b>	Make the Dennisport Village Center to make the area more attractive and accessible by providing street furniture and other pedestrian amenities.		
<b>Description</b>	Street furniture, trash receptacles, etc.		
<b>Overall Project Benefits</b>	The project is a part of an overall economic development strategy for the Village of Dennisport. The pedestrian amenities will make the village area more attractive and will encourage visitors to stay in the village for longer periods of time.		
<b>Estimated Job Creation</b>	Construction:		
	Permanent: The Dennisport Village Center redevelopment strategy could create up to 180 new jobs in the village.		



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<b>Measures of Success</b>	Quantitative: Increased numbers of pedestrians visiting downtown Dennisport.		
	Qualitative: Improved pedestrian access.		
<b>Estimated Duration</b>	On going		
<b>Estimated Total Cost</b>	\$73,750	Public Share: TBD, town is creating a District Improvement Financing (DIF) for this area	Private Share:

<b>Project Title</b>	South Street Sidewalks from Main Street to Depot Street		
<b>Goal of the Project</b>	Upgrade north/south sidewalk connection serving restaurant and retail uses located a short distance off Main Street, Dennisport.		
<b>Description</b>	Upgrade existing sidewalks, fill in gaps, reset curbs and reestablish curb cuts.		
<b>Overall Project Benefit</b>	The project is a part of an overall economic development strategy for the Village of Dennisport. The sidewalk serves as a principal connection to several vital land uses in the village center.		
<b>Estimated Job Creation</b>	Construction:		
	Permanent: The Dennisport Village Center redevelopment strategy could create up to 180 new jobs in the village.		
<b>Measures of Success</b>	Quantitative: Increased numbers of pedestrians visiting downtown Dennisport.		
	Qualitative: Improved pedestrian access.		
<b>Estimated Duration</b>			
<b>Estimated Total Cost</b>	\$46,000	Public Share: \$46,000	Private Share:



<b>Project Title</b>	Telegraph Road Sidewalks from Upper County Road to Main Street		
<b>Goal of the Project</b>	Upgrade pedestrian facilities along one of the primary north/south connections in the Dennisport Village Center.		
<b>Description</b>	Upgrade existing sidewalks, fill in gaps, reset curbs, and reestablish curb cuts.		
<b>Overall Project Benefit</b>	The project is a part of an overall economic development strategy for the Village of Dennisport. The sidewalk serves as one of two north/south connections in the downtown.		
<b>Estimated Job Creation</b>	Construction:		
	Permanent: The Dennisport Village Center redevelopment strategy could create up to 180 new jobs in the village.		
<b>Measures of Success</b>	Quantitative: Increased numbers of pedestrians visiting downtown Dennisport.		
	Qualitative: Improved pedestrian access.		
<b>Estimated Duration</b>			
<b>Estimated Total Cost</b>	\$22,000	Public Share: \$22,000	Private Share:

<b>Project Title</b>	Upper County Road Parking Lot		
<b>Goal of the Project</b>	Improved vehicular access to Dennisport Village Center.		
<b>Description</b>	Regrading, new signage, and landscaping improvements for the parking lot between Upper County Road and Main Street located west of Telegraph Road. New signage directing people to the location of parking area.		
<b>Overall Project Benefit</b>	The project is a part of an overall economic development strategy for the Village of Dennisport. The parking lot serves as overflow parking for the westerly area of the village, several restaurants, and the town library.		



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<b>Estimated Job Creation</b>	Construction:		
	Permanent: The Dennisport Village Center redevelopment strategy could create up to 180 new jobs in the village.		
<b>Measures of Success</b>	Quantitative: Increased number of vehicles using the parking lot.		
	Qualitative: Increased pedestrian trips from this site to the downtown.		
<b>Estimated Duration</b>			
<b>Estimated Total Cost</b>	\$22,000	Public Share:	Private Share:

<b>Project Title</b>	Dennisport Village Center Wastewater Improvements		
<b>Goal of the Project</b>	Provide a centralized wastewater facility serving downtown businesses, at least those located in the densest portion of the village.		
<b>Description</b>	Upgrade septic systems and construct a shared wastewater system such as a package waste water treatment plant with a shared leaching area on town property.		
<b>Overall Project Benefit</b>	The project is a part of an overall economic development strategy for the Village of Dennisport. The project will improve economic conditions in the village and remove a major obstacle to redevelopment. The project will also ensure that town affordable housing goals for the village are capable of being implemented.		
<b>Estimated Job Creation</b>	Construction:		
	Permanent: The Dennisport Village Center redevelopment strategy could create up to 180 new jobs in the village.		
<b>Measures of Success</b>	Quantitative: Improved water quality, increased investment in the district, increased numbers of housing units in the district.		
	Qualitative: Improved economic conditions in Dennisport.		



<b>Estimated Duration</b>			
<b>Estimated Total Cost</b>	\$10,000,000	Public Share: TBD Potential District Improvement Financing (DIF) funding	Private Share: TBD

<b>Project Title</b>	Upper County Road Sidewalks from Sea Street to Candlewood Lane
<b>Goal of the Project</b>	Upgrade pedestrian facilities adjacent to the Dennisport Village Center connecting proposed Chapter 40R residential district to the village.
<b>Description</b>	Upgrade existing sidewalks, fill in gaps, reset curbs, and reestablish curb cuts.
<b>Overall Project Benefit</b>	The project is a part of an overall economic development strategy for the Village of Dennisport. The sidewalk serves as the principal access between a proposed higher density housing project, the existing sidewalk network, and downtown stores.
<b>Estimated Job Creation</b>	Construction:
	Permanent: The Dennisport Village Center redevelopment strategy could create up to 180 new jobs in the village.
<b>Measures of Success</b>	Quantitative: Increased numbers of pedestrians visiting downtown Dennisport.
	Qualitative: Improved pedestrian access.



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<b>Estimated Duration</b>			
<b>Estimated Total Cost</b>	\$15,000	Public Share: \$15,000	Private Share:

<b>Project Title</b>	Upper County Road Sidewalks from Main Street to Telegraph Road
<b>Goal of the Project</b>	Upgrade pedestrian facilities in the Dennisport Village Center to make the area more attractive and accessible.
<b>Description</b>	Upgrade existing asphalt sidewalks, reset curbs, and establish appropriate village-oriented plantings.
<b>Overall Project Benefit</b>	The project is a part of an overall economic development strategy for the Village of Dennisport. The sidewalk serves as “back” access to downtown stores.
<b>Estimated Job Creation</b>	Construction:
	Permanent: The Dennisport Village Center redevelopment strategy could create up to 180 new jobs in the village.
<b>Measures of Success</b>	Quantitative: Increased numbers of pedestrians visiting downtown Dennisport.
	Qualitative: Improved pedestrian access.
<b>Estimated</b>	



<b>Duration</b>			
<b>Estimated Total Cost</b>	\$39,000	Public Share: \$39,000	Private Share:

<b>Project Title</b>	Upper County Road Sidewalks from Telegraph Road to Sea Street
<b>Goal of the Project</b>	Upgrade pedestrian facilities adjacent to the Dennisport Village Center connecting existing residential uses to the village.
<b>Description</b>	Upgrade existing sidewalks, fill in gaps, reset curbs, and reestablish curb cuts.
<b>Overall Project Benefit</b>	The project is a part of an overall economic development strategy for the Village of Dennisport. The sidewalk serves as the principal access between several higher density housing projects and downtown stores.
<b>Estimated Job Creation</b>	Construction:
	Permanent: The Dennisport Village Center redevelopment strategy could create up to 180 new jobs in the village.
<b>Measures of Success</b>	Quantitative: Increased numbers of pedestrians visiting downtown Dennisport.
	Qualitative: Improved pedestrian access.





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<b>Estimated Duration</b>			
<b>Estimated Total Cost</b>	\$94,000	Public Share: \$94,000	Private Share:

<b>Project Title</b>	Upper County Road Traffic Circulation Improvements
<b>Goal of the Project</b>	Improve traffic circulation and reduce congestion in the downtown.
<b>Description</b>	As part of the Upper County Road, Main Street, Division Street intersection improvements, make Upper County Road one-way from Main Street to Telegraph Road. This will allow for wider sidewalks and more on-street parking. It will also be a safer condition than simply blocking off access from Upper County Road to the Main Street intersection.
<b>Overall Project Benefit</b>	The project is a part of an overall economic development strategy for the Village of Dennisport. Upper County Road serves the second most important roadway in the village providing access to downtown stores and other parts of Dennis. Adding parking and providing wider sidewalks than addressed in other stand-alone projects will help improve conditions in the village center.
<b>Estimated Job Creation</b>	Construction:
	Permanent: The Dennisport Village Center redevelopment strategy could create up to 180 new jobs in the village.



<b>Measures of Success</b>	Quantitative: Reduced congestion in the downtown Dennisport.		
	Qualitative: Improved parking and pedestrian access.		
<b>Estimated Duration</b>			
<b>Estimated Total Cost</b>	\$250,000	Public Share:	Private Share:

<b>Project Title</b>	Upper County Road, Main Street, Division Street Intersection Improvements
<b>Goal of the Project</b>	Improve traffic circulation and reduce congestion at major downtown intersection.
<b>Description</b>	Change the circulation of Upper County Road such that it only carries traffic out of the intersection. These traffic circulation changes would require new signage and perhaps the removal of some asphalt. This may also allow for adding parking along Upper County Road.
<b>Overall Project Benefit</b>	The project is a part of an overall economic development strategy for the Village of Dennisport. The intersection is located at the town line and can back up traffic throughout the village center. Improving this location will attract visitors to the village who may fear getting caught in traffic.
<b>Estimated Job Creation</b>	Construction:
	Permanent: The Dennisport Village Center redevelopment strategy could create up to 180 new jobs in the village.



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<b>Measures of Success</b>	Quantitative: Reduced traffic congestion in the downtown Dennisport.		
	Qualitative: Improved vehicle circulation, and shorter lines of cars at the intersection on summer weekends.		
<b>Estimated Duration</b>			
<b>Estimated Total Cost</b>	\$250,000	Public Share:	Private Share:

#### TOWN OF HARWICH

<b>Project Title</b>	Harwich Harbor Infrastructure
<b>Goal of the Project</b>	Economic development centered on the town's three Nantucket Sound harbors
<b>Description</b>	Redesign harbor waterfront areas to facilitate access for boaters and the general public. Maintain and improve infrastructure including piers, bulkheads, channel, access/parking, restrooms, and wastewater treatment facilities.
<b>Overall Project Benefit</b>	Increase employment, facilitate general boating uses, improve public access.
<b>Estimated Job Creation</b>	Construction: 50 jobs
	Permanent: 50 jobs



<b>Measures of Success</b>	Quantitative:		
	Qualitative:		
<b>Estimated Duration</b>	2011 – 2016 with additional phases thereafter		
<b>Estimated Total Cost</b>		Public Share: \$10 million	Private Share: \$20 million

<b>Project Title</b>	Harwich Center Arts and Culture Project (Note: This project was also on the 2009 CEDS Local Capital Projects list.)		
<b>Goal of the Project</b>	Create a destination based on arts and culture.		
<b>Description</b>	Wastewater treatment infrastructure and road improvements are needed to realize the full potential of Harwich Center.		
<b>Overall Project Benefit</b>	Increase direct employment in arts and culture. Additional visitor use will increase use of local restaurants and stores.		
<b>Estimated Job Creation</b>	Construction: 20		
	Permanent: 30		
<b>Measures of</b>	Quantitative:		



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<b>Success</b>	Qualitative:		
<b>Estimated Duration</b>	2011 - 2015		
<b>Estimated Total Cost</b>		Public Share: \$750,000	Private Share: \$750,000

<b>Project Title</b>	Wastewater Infrastructure – East Harwich and Harwich Port
<b>Goal of the Project</b>	Enhance one historic village center and facilitate growth potential in another village center.
<b>Description</b>	Harwich Port is a traditional village that is rebounding from a declining economy. Planning efforts in East Harwich seek to transform the center into a mixed-use pedestrian-friendly economic center. Both areas will benefit from improved wastewater infrastructure.
<b>Overall Project Benefit</b>	Increase employment opportunities in a village setting. Also, create additional housing and commercial uses.
<b>Estimated Job Creation</b>	Construction: 100 jobs
	Permanent: 200 jobs
<b>Measures of Success</b>	Quantitative:
	Qualitative:



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<b>Estimated Duration</b>	2011-2020		
<b>Estimated Total Cost</b>		Public Share: \$50 million	Private Share: \$100 million

#### TOWN OF SANDWICH

<b>Project Title</b>	Sandwich Village Improvement Project
<b>Goal of the Project</b>	To preserve and improve significant historic features in Sandwich adjacent to the recently restored Town Hall. Upgrades to an artesian water fountain, fish ladder, grist mill dam, and pedestrian accessibility are all elements of this project that will enhance a major village attraction for both residents and tourists, both critical to Sandwich's economy.
<b>Description</b>	The Sandwich Village Improvement Project entails reconstruction and restoration of functional scenic and historic features as well as providing safe accessibility to these features in Sandwich Village. Improvements to a fish ladder, grist mill dam, artesian water fountain and new pedestrian sidewalk and bridge are major elements of this project. Conceptual plans are complete and design is at 25%.
<b>Overall Project Benefit</b>	This project will complement the recently restored Town Hall. The artesian water fountain, fish ladder, and grist mill dam located in Sandwich Village are all major attractions for both residents and tourists. Improving these features and accessibility to these attractions would preserve the historic and scenic qualities of this area and provide a boost to Sandwich's economy. Business owners in Sandwich rely heavily on tourism so it is essential that these features be preserved for today and future years. Pedestrian facilities are critical to this project to provide safe and contiguous access to Sandwich's historic sites. These historic and scenic features draw needed tourists who, in turn, support 25 to 30 businesses in the village, with hundreds of employees working at these locations.
<b>Estimated Job Creation</b>	Construction: 40 to 45



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	Permanent: 20 to 25		
<b>Measures of Success</b>	Quantitative: Number of tourist/visitors to village area. Sales of local businesses.		
	Qualitative: Improved water quality at fountain. Visual upgrade of village area and improved quality of life.		
<b>Estimated Duration</b>	Start in Fall 2011 and complete in Spring 2012		
<b>Estimated Total Cost</b>	\$2 million	Public Share: TBD	Private Share: TBD

<b>Project Title</b>	South Sandwich Business District Infrastructure (Note: This project was also on the 2009 CEDS Local Capital Projects list.)		
<b>Goal of the Project</b>	To provide infrastructure to the South Sandwich Business District in an effort to attract business to this designated growth area. Infrastructure such as roadways, pedestrian, and transit amenities are critical to provide an incentive to develop town-owned land in the district.		
<b>Description</b>	Transportation improvements include constructing an internal road on town-owned land to provide access to existing and future land-uses within and adjacent to a 55-acre parcel, including retail, residential, recreational, and office. Pedestrian sidewalks and transit facilities both within the town-owned land and on adjacent public roads would enhance alternate modes of transportation in the district. Design completion of sidewalks, transit routes, and roadways range from conceptual to 100% design stages.		
<b>Overall Project Benefit</b>	Enhance economy in South Sandwich Business District by providing an incentive for development in this growth center. This, in turn, will attract more visitors, shoppers, and workers to this area.		
<b>Estimated Job Creation</b>	Construction: 500		
	Permanent: 250		
<b>Measures of Success</b>	Quantitative: Sales, commercial square footage, visitors.		



	Qualitative: Quality of life improvements, new facilities, and amenities for residents and tourists.		
<b>Estimated Duration</b>	Start in Spring 2012 and complete in Fall 2013		
<b>Estimated Total Cost</b>	\$4 million	Public Share: TBD	Private Share: TBD

<b>Project Title</b>	Town Neck Beach & Boardwalk Bathhouse		
<b>Goal of the Project</b>	To enhance visitor accommodations by constructing a bathhouse at Sandwich's Town Neck Beach and Boardwalk.		
<b>Description</b>	Town Neck Beach and the Sandwich Boardwalk are major attractions to residents and tourists experiencing the beautiful Sandwich Harbor area. Visitors are currently inconvenienced by lack of bathrooms at this location. The bathhouse will provide visitors a safe, convenient, ADA-accessible and sanitary facility to change and use the restroom facilities. Construction will include an elevated septic tank and underground utilities. Concessions will also be provided at the bathhouse during the summer season.		
<b>Overall Project Benefit</b>	The bathhouse will enhance the beach and boardwalk experience and increase tourism to this area. This project will also complement recent town efforts to minimize pollution to Mill Creek and Sandwich Harbor, resulting in re-opening of shellfish beds for the first time since 1985.		
<b>Estimated Job Creation</b>	Construction: 50		
	Permanent: 10		
<b>Measures of Success</b>	Quantitative: Number of visitors.		
	Qualitative: Quality of life improvement. Improved water quality - allowing continued shellfishing in this area.		
<b>Estimated Duration</b>	Fall 2011 to Spring 2012		
<b>Estimated Total Cost</b>	\$700,000	Public Share: TBD	Private Share: TBD





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<b>Project Title</b>	Wastewater Treatment (Note: This project was also on the 2009 CEDS Local Capital Projects list.)
<b>Description</b>	A comprehensive solution to wastewater needs (i.e., wastewater treatment plant), particularly for the South Sandwich Business District (the so-called "Golden Triangle") and the Sandwich Industrial Area.
<b>Estimated Total Cost</b>	TBD

TOWN OF TRURO

<b>Project Title</b>	South Jetty Restoration		
<b>Goal of the Project</b>	To restore the foundation of a 1957 jetty at the entrance to Pamet Harbor		
<b>Description</b>	The south jetty of Pamet Harbor is a stone jetty that is collapsing. It was built in 1957. If it is not repaired, the area will scour through, causing a public safety hazard and a wildlife hazard.		
<b>Overall Project Benefit</b>	Safety, wildlife habitat, and keep commercial fishing and recreational use possible.		
<b>Estimated Job Creation</b>	Construction:		
	Permanent:		
<b>Measures of Success</b>	Quantitative:		
	Qualitative:		
<b>Estimated Duration</b>	November 2011 – April 2012		
<b>Estimated Total Cost</b>	400,000	Public Share: 100%	Private Share:



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## Appendices

### 2012 Annual CEDS Report







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<b>APPENDIX 1: CEDS STRATEGY COMMITTEE MEETING AGENDAS</b>
<b>APPENDIX 2: SMARTERCAPE SUMMIT AGENDA AND ATTENDEES</b>
<b>APPENDIX 3: CEDS WORKSHOP INVITE, ATTENDEES, AND PRESENTATIONS</b>



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## Appendix 1: CEDS Strategy Committee Meeting Agendas





## Cape Cod Economic Development Council

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### Monthly Meeting Agenda

**Meeting Date:** September 8, 2011

**Time:** 5:00 PM

**Location:** Cape Cod Commission Conference Room

1. Board Minutes
  2. Council Chair's Report
    - Cape & Islands License Plate Review
  3. Grant Committee Report
    - Grant Program Restructuring
  4. CEDS Implementation Update
    - FY12 Workplan
    - StatsCapeCod Demo
  5. Other
- 

**Meeting Date:** October 6, 2011

**Time:** 5:00 PM

**Location:** Cape Cod Commission Conference Room

1. Board Minutes
  - a. June
  - b. September
2. Council Chair's Report
3. CEDS Implementation Update



## Cape Cod Economic Development Council

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### Monthly Meeting Agenda

4. RESET Update:
    - a. Bourne
  5. Public Outreach Update:
    - a. Barnstable Economic Development Committee
    - b. SmarterCape Visioning Session
  6. Other
- 

**Meeting Date:** November 3, 2011

**Time:** 5:00 PM

**Location:** Cape Cod Commission Conference Room

1. Board Minutes
  2. Council Chair's Report
  3. Grant Committee Report
  4. Nominating Committee Report
    - Expiring terms
  5. CEDS Implementation Update
    - SmarterCape Update
    - Years 4 and 5
  6. Other
- 

**Date:** November 18, 2011

**Time:** 12:00 PM



## Cape Cod Economic Development Council

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### Monthly Meeting Agenda

**Location:** Housing Assistance Corporation  
460 West Main Street  
Hyannis, MA 02601

**Subject:** CEDS Implementation - Grant Recommendation

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**Meeting Date:** December 1, 2011

**Time:** 5:00 PM

**Location:** Cape Cod Commission Conference Room

1. Board Minutes
2. Council Chair's Report
3. Grant Committee Report
4. Nominating Committee Report
  - Term expiration
5. CEDS Implementation Update
  - Years 4 and 5

Other

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**Meeting Date:** January 5, 2012

**Time:** 5:00 PM

**Location:** Cape Cod Commission Conference Room



## Cape Cod Economic Development Council

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### Monthly Meeting Agenda

1. Board Minutes
    - November 18, 2011
    - December 1, 2011
  2. Council Chair's Report
    - Gene Curry - CC Tech Council Infrastructure Committee Program
  3. Grant Committee Report
  4. Public Outreach
    - SmarterCape Update
  5. Other
- 

**Meeting Date:** February 2, 2012

**Time:** 5:00 PM

**Location:** Cape Cod Commission Conference Room

1. Board Minutes
  2. Council Chair's Report
  3. Grant Committee Report
  4. Data Center/Research Update
    - a. Business Survey – Presentation of Results (Leslie Richardson)
  5. Other
-



## Cape Cod Economic Development Council

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### Monthly Meeting Agenda

**Meeting Date:** March 1, 2012

**Time:** 5:00 PM

**Location:** Cape Cod Commission Conference Room

6. Board Minutes

- January 5, 2012
- February 2, 2012

7. Council Chair's Report

- a. Guest Speaker
- b. License Plate Fund Update

8. Grant Committee Report

- a. RFP Update

9. CEDS Implementation

- a. SmarterCape

10. Other

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**Meeting Date:** April 5, 2012

**Time:** 5:00 PM

**Location:** Cape Cod Commission Conference Room

1. Guest Speaker

2. Board Minutes

- January 5, 2012
- February 2, 2012

3. Council Chair's Report



# Cape Cod Economic Development Council

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## Monthly Meeting Agenda

- Military Asset and Security Strategy Task Force Mtg. Brief
  - 4. Grant Committee Report
    - RFP for Barnstable County Technology Audit Update
  - 5. CEDS Implementation Updates
    - SmarterCape Summit
    - Zero Waste Project
    - Strategic Information Office
    - Redevelopment Authority
- 

**Meeting Date:** May 3, 2012

**Time:** 5:00 PM

**Location:** Cape Cod Commission Conference Room

1. Board Minutes
2. Council Chair's Report
  - Guest Speakers-  
Terrie Cook, Chair, Mashpee EDIC  
Michael Galasso, Chair, Falmouth EDIC
3. Grant Committee Report
  - Cape-wide Tech Survey & Inventory Update
4. CEDS Implementation Update
  - SmarterCape Summit Update
  - SmarterCape Summit Sponsorship
  - Strategic Information Office Presentation-Paul Niedzwiecki



## Cape Cod Economic Development Council

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### Monthly Meeting Agenda

#### 5. Other

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**Meeting Date:** June 7, 2012

**Time:** 5:00 PM

**Location:** Cape Cod Commission Conference Room

1. Board Minutes
2. Council Chair's Report
3. Grant Committee Report
4. CEDS Implementation Update
  - CEDS Endorsement
5. Public Outreach
  - SmarterCape Summit Review
6. Other
  - EDD Designation/Islands and Tribe Inclusion
  - Boston Magazine



## Appendix 2: SmarterCape Summit Agenda and Attendees



Monday, May 14<sup>th</sup> - Tuesday, May 15<sup>th</sup>

Agenda

**MONDAY, MAY 14<sup>TH</sup>**

**1:00 – Registration – Nauset Center Lobby**

**1:30 – Welcome – Ballroom I, II, III**

Master of Ceremonies: Mindy Todd - Host and producer of The Point on the Cape and Islands NPR Stations WCAI, WNAN, and WZAI

Welcome Remarks: The SmarterCape Partnership and Cape Cod Five present the next day and a half of activities for SmarterCape Summit II.

**2:00 - Opening Plenary: - Ballroom I, II, III**

Speaker: Paul Niedzwiecki – Executive Director of the Cape Cod Commission, will help us envision a smarter future and highlight some efforts towards that goal.

Speaker: Dan Gallagher – CEO of OpenCape Corp. will provide an update on the progress of building out the region's enhanced broadband network.

Speaker: Alan Davis – CEO of CapeNet LLC. CapeNet is contracted to construct and maintain the OpenCape network. Alan will expand on Dan's deployment report and discuss the practical possibilities of the network.

**3:00 - Break: Refreshments – Nauset Center @ the Solutions Room – Nauset I**

**3:15 - Breakout Session I: All Breakouts are in the Nauset Center – please note the room.**

Smarter Environment: The Wastewater Challenge – Modeling the Solutions  
Nauset IV

Ken Moraff of the US Environmental Protection Agency, and Bruce Tobey, attorney with Pannone Lopes Devereaux & West and former Mayor of Gloucester, MA, will look at how other regions are addressing their wastewater issues.

Smarter Development: Smarter Villages  
Nauset V

What would it mean to be a Smarter Village? Scott Horsley, President and Senior Environmental Scientist with the Horsley Witten Group, and Don Powers, Architect with Union Studio, will paint a picture of villages that capture the advantages of the past while embracing a sustainable future.

Monday, May 14<sup>th</sup> - Tuesday, May 15<sup>th</sup>

Agenda

Smarter Economy: Broadband and Economic Development

Nauset III

Consultant, broadband specialist, media go-to person, internationally recognized speaker, radio talk show host, Craig Settles helps public and private sector organizations use broadband technology to accelerate economic development, reduce costs, and operate more effectively. Come hear how it's done.

Smarter Transportation: Looking Beyond a Faster Horse

Highland

Henry Ford said, "*If I'd asked customers what they wanted, they would have said a faster horse*". Technology provides us with a new paradigm for transportation and OpenCape is a tool that will propel the Cape into this new frontier. This session will present a concept paper that identifies emerging transportation challenges for Cape Cod and smarter strategies for how the needs can be addressed efficiently. David Schropfer, Chairman and CEO of EnviroDerm, Inc. will facilitate this session.

Smarter Education: Past, Present, and Future

Nauset II

Come learn about Cape Cod's enrollment trends for K-12, past and present, from Paul Hilton, of the Cape Cod Collaborative. Then take a look into the future with a model from Khan Academy that "flips the classroom."

Smarter Healthcare: The Shifting Healthcare Landscape: Where's the Patient?

Chatham

The healthcare system will undergo significant changes in the next few years. What does it all mean? Michael K. Lauf, President and CEO of Cape Cod Healthcare, will introduce Lynn Nicholas, FACHE, President and Chief Executive Officer, of the Massachusetts Hospital Association, who will examine this issue.

Smarter Government: Current thinking and planning for Smarter Government

Race Point

Dan Gallagher, CEO of OpenCape, Paul Niedzwiecki, Executive Director of the Cape Cod Commission, and Ed Senteio, Finance Department, Town of Yarmouth, will provide a glimpse into our smarter future by introducing current efforts towards digital regionalization and smarter governmental service delivery.

**4:15 - Break**

**4:30 - Plenary Session – Ballroom I, II, III**



Monday, May 14<sup>th</sup> - Tuesday, May 15<sup>th</sup>

## Agenda

Speaker: Joanne Hovis – President of Columbia Telecommunications Corp., will speak on the relationship between broadband and government, a critical step for Cape Cod as we look to regional delivery of government digital services.

Speaker: Craig Settles – Host of Gigabit Nation, will speak on the use of broadband technologies to improve efficiencies in the public sector and economic development in the private sector.

### **5:30 – Reception – weather permitting – The Garden Terrace**

### **7:15 - Dinner Session – Ballroom I (Paid Event - \$65 per person)**

Keynote Speaker: Danna Bailey – Vice President of EPB, the non-profit electric and broadband utility for the City of Chattanooga, TN, will speak on Chattanooga's recent deployment of enhanced broadband and how it has impacted the region. EPB serves a region similar in size to Cape Cod, so there will be opportunities to share lessons learned.

## **TUESDAY, MAY 15<sup>TH</sup>**

### **7:00 - Registration – Nauset Center Lobby**

### **7:30 – Breakfast – Ballroom I (Paid Event - \$23 per person)**

Introduction: Cape & Islands State Senator, Daniel Wolf – the Senator works to build an economy that will encourage our communities to grow while retaining our unique character, creating jobs so the next generation can prosper.

Keynote Speaker: John Landry – Tech visionary, serial entrepreneur, and angel investor (Lead Dog Ventures) speaks on trends in business and the technology outlook.

### **9:00 - Break**

### **9:15 - Plenary Session - Ballroom I, II, III**

Speaker: Emily Nagle Green – CEO of Smart Lunches, LLC, a rapidly growing Internet retail business that brings nutritious meals to children away from home, and former Chairman of the Board of Yankee Group, a storied technology research firm, will speak on navigating the global connectivity revolution.



Monday, May 14<sup>th</sup> - Tuesday, May 15<sup>th</sup>

## Agenda

Speaker: Sarah Hoit – CEO and Co-founder of Connected Living, a career social entrepreneur focused on companies that impact larger social issues, will speak on digital inclusion for all generations, a key component for a Smarter Cape Cod.

### **10:45 - Break: Refreshments – Nauset Center @ the Solutions Room – Nauset I**

### **11:00 - Breakout Session II: All Breakouts are in the Nauset Center – please note the room.**

Smarter Environment: Smarter Energy Future

#### Nauset IV

Scott Ridley, energy expert, and Gordian Raacke, of Renewable Energy Long Island, will share approaches to smarter energy delivery and management.

Smarter Development: Public-Private Partnerships

#### Nauset V

How do we get to a smarter future? What are the tools in our toolbox? Teno West, attorney with Pannone Lopes Devereaux & West, Sharon Nunes of IBM, and Angus Jennings, Director of Land Use Management with the Town of Westford, MA will lead a lively discussion of options and opportunities for the private and public sectors to work together towards a smarter future.

Smarter Economy: Entrepreneurship

#### Nauset III

What does it take to be an Entrepreneur? What about a Smarter Entrepreneur? Veteran entrepreneurs Sarah Hoit and Mark Watson and entrepreneurship expert Nina Greenwald of University of Massachusetts Boston's Critical & Creative Thinking Program, will hold a dynamic panel discussion on being an entrepreneur in the broadband age.

Smarter Transportation: The Future of Transportation – Your Car or iCar?

#### Highland

George Jetson, living in Orbit City in 2062, had a flying car that drove itself. This session will present some of the “Star Wars” technologies such as autonomous vehicles, smarter roads, and transportation alternatives. These options are just behind the curtain and will be with us long before 2062 so we need to be planning for them. The panelists are Ryan Harrington, Volpe National Transportation Systems Center; Dr. Emilio Frazzoli, MIT; and Gary Ritter, Volpe's Innovative Tech Group.

Smarter Education: New Models for Virtual Learning

#### Nauset II

Come learn about new models for learning, determining the value index of these models for institutions and students. Find out the right questions to ask, Liz Pape from Virtual High School, and Dr. Kirk Kolenbrander from MITx will lead this session.

Monday, May 14<sup>th</sup> - Tuesday, May 15<sup>th</sup>

Agenda

Smarter Healthcare: The Healthcare Marketplace Exchanging Glances: Competition or Collaboration?

Chatham

Today healthcare organizations compete fiercely for patients and dollars. Tomorrow's reimbursement landscape will require these same organizations to collaborate – but how? Nancy Schmidt, Vice President, Referral Relations, Admissions & Marketing, Partners Continuing Care / Spaulding Rehabilitation Network; Dr. James Butterick, Chief Medical Officer Emeritus, Cape Cod Healthcare; and David Rehm, Chief Executive Officer of Hospice and Palliative Care of Cape Cod, are the panelists.

Smarter Government: Interesting Insights from Other Parts of the Country?

Race Point

Panelists Danna Bailey, EPB Chattanooga; Joanne Hovis, President of the National Association of Telecommunications Officers and Administrators; and Nigel Jacob and Chris Osgood of the City of Boston, discuss interesting smarter government initiatives in their communities and across the country.

**12:15 – Lunch – Ballroom I, II, III**

Keynote Speaker: Secretary Greg Bialecki – Executive Office of Housing & Economic Development, is Governor Deval Patrick's chief economic development and housing advisory and cabinet member. He will speak on his work to expand the Commonwealth's nation-leading innovation economy.

Presenter: John Landry (also see breakfast!) will be presenting his peek into the future and how new technologies will drive new business opportunity.

**2:15 - Breakout Session III: All Breakouts are in the Nauset Center – please note the room.**

Smarter Environment: Unified Planning

Nauset IV

The environment and the economy are related systems. How do you plan for such complex and interconnected systems? Come to this session and brainstorm about how these systems work together and how we might develop a unified resource management plan to address energy, solid waste, and wastewater.

Smarter Development: Workshop – Smarter Village Certification Program

Nauset V

Come ready to critique! The Smarter Development Working Group proposes for your feedback a voluntary certification program for identifying examples of Smarter Villages. Starting with a set of development principles and moving to a checklist to grade new and

Monday, May 14<sup>th</sup> - Tuesday, May 15<sup>th</sup>

Agenda

existing villages for their level of sustainability, the group proposes a new program to inform developers and policy makers.

Smarter Economy: Marketing a SmarterCape

Nauset III

How do we take advantage of our new broadband infrastructure to strengthen our existing businesses and attract new entrepreneurs to the region? Come share your ideas as we begin to define a strategy for building a Smarter Economy.

Smarter Transportation: Intelligent Transportation Systems – An Oxymoron?

Highland

The Cape cannot maintain its character and accommodate transportation needs without getting smarter. A recent ITS implementation plan leverages OpenCape, which is regarded as a “game changer” for providing new opportunities. This session will discuss existing ITS, OpenCape opportunities, and what we can expect in 2025 for smart infrastructure that supports emerging vehicle and transportation information technology. Dr. John Collura of UMass Amherst; Larry Harman with Bridgewater State University; and Steve Russell from the Department of Energy Resources are the panelists.

Smarter Education: The Effect a Gigabyte Will Have on Cape Cod Educational Opportunities

Nauset II

This session will review a framework of the environment that supports Campus Cape Cod, present a draft concept paper, and discuss recommendations and next steps.

Smarter Healthcare: Smarter Healthcare Working Session

Chatham

What challenges and opportunities do all the key stakeholders in the healthcare field share, which can be solved most efficiently in a collaborative manner, and are aligned with everyone's strategic goals? This is no small challenge! This facilitated working session will present a number of ideas for review, input, and feedback, with a goal of identifying a short list of ideas which, if implemented, would result in Smarter Healthcare in our region. Come be part of the discussion! Introduction will be provided by John Campbell, Chief Information Officer, Spaulding Rehabilitation Network. Facilitated by Todd Herrmann, Director of Strategic Planning, Southcoast Health System; and James McNamara, Director of New Program Development, Hospice and Palliative Care of Cape Cod.

Smarter Government: What More Have We Learned?

Race Point

This is an opportunity to consider our current direction, informed by what we have learned from the plenary sessions, our visiting Smarter Government speakers, and the



Monday, May 14<sup>th</sup> - Tuesday, May 15<sup>th</sup>

## Agenda

general knowledge and experience of our working group participants, to alter our current direction, omit, expand, and generally improve our thinking on the direction we are taking Smarter Government. This discussion will directly contribute to the further editing of the Smarter Government Concept Paper that will serve as the basis for our movement forward.

### **3:15 - Break**

### **3:30 - Plenary Session – Ballroom I, II, III**

Special Presenter: IBM – the world's largest technology services company will speak about their Smarter Planet initiative

Next Steps: The SmarterCape Partnership\* CEOs and leadership report on Summit breakout reports and how we continue to create a Smarter Cape Cod. (Dan Gallagher, Bert Jackson, Paul Niedzwiecki, Wendy Northcross, Felicia Penn)

SmarterCape Summit Attendees  
May 14 - 15, 2012

First Name	Last Name	Title	Company
Abigail	Adams	Client Services	Secure Networks
Kevin	Adolph	CEO	SoftRight, LLC
Terry	Ahern	VP Strategy & Community	Cape Cod Healthcare
Melinda	Ailes	Regional Director	MA Small Business Development
Elizabeth	Albert	Director	Barnstable County Human Servic
James	Albert	VP/CIO	Jordan Hospital
Sebastian	Amenta	Regional Program Director	Comprehensive Environmental In
Gary	Anderson	Technical Operations Manag	Comcast Cable
Lois	Andre	Director, Perkins Programs	Cape Cod Community College
Gavin	Archibald	VP Production Operations	athenahealth, Inc.
Liz	Argo		
Kate	Armstrong	GIS Analyst	Cape Cod Commission
Sibel	Asantugrul	County Building Inspector	Barnstable County
David	Augustinho	Exec Director	CIWIB
Paula	Bacon	member	Dennis Economic Development
Michael	Bailey	journalist	Capenews.net
Danna	Bailey	Vice President	EPB
Chris	Bailey		Bailey Brokerage & Consulting
Larry	Ballantine	Selectman	Town of Harwich
Foster	Banford	IT Director	Town of Harwich
Greg	Banwarth	AVP of Technology / CIO	Cape Cod Community College
Earle	Barnhart		CEES
Lauren	Baskin	President	True Value Hardware
Deborah	Battles, M.Ed.	Career Advisor-DOL Project	Cape Cod Community College
Steve	Baty		All Media Productions
Brian	Baumgaertel		Barnstable County DHE
Kate	Bavelock	Executive Director	Sandwich Chamber of Commerce
Lenore	Bavota	VP	Web Video Specialists Global
Woody	Bavota	President	Web Video Specialists Global
Joanne	Bayles	Regional Relationship Mana	Cape Cod Five
Don	Bayley	Owner	FYI World Media
Joseph	Bayne	Director	OpenCape Corp.
Clive	Beasley		
Michael A.	Bell	President	Emerging Technology Group, Inc
Jim	Benoit	GIS Coordinator	Town of Barnstable
Arthur	Bergeron	Attorney	Mirick O Connell
Gregory	Bialecki	Secretary	Commonwealth of MA
Alice	Boyd	President	Bailey Boyd Associates, Inc.
Steven	Brabant	CTO	Granit Block Global DC, Inc.
Brian	Braginton-Smith	President	The Conservation Consortium
Kenneth	Buckland	Principal	The Cecil Group, Inc.
Stephen	Buckley	CIO	U.S.Transparency
Jose	Burgos	Wireless Sales Specialist	Green Mountain Communications
Edward	Burt	Owner	Quissett Systems
Chris	Burt	Technical Support Spec.	Barnstable County
Steve	Buss	MIS Director	Town of Dennis
Peter	Butler	CEO-CTO	FiberCape Internet Services



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First Name	Last Name	Title	Company
James	Butterick	Chief Medical Officer	Care Cod Healthcare
Thomas	Cahir	Administrator	Cape Cod Regional Transit Auth
Tom	Cambareri	Water Resources Program	
Larry	Cameron	Vice President	MassDevelopment
JOHN	CAMPBELL		SPAULDING CAPE COD
Richard	Canfield	School Superintendent	Sandwich Schools
Glenn	Cannon	Technical Services Directo	Cape Cod Commission
Fred	Carbone	Owner	The Bay Motor Inn
Kristin	Carey	Director	Cape Cod Chamber of Commerce
John	Carlton-Foss	CEO	FallAWare Inc.
John	Carlton-Foss	Volunteer Camera Operator	Falmouth Community Television
Kris	Chalke	Sales Agent	William Raveis Real Estate
Nancy	Chen		Cape Cod Community College
Ryan	Christenberry	Planner	Cape Cod Commission
Bo	Chu		
Cathy	Clarke	President	CNC Associates
Bob	Cody	Dean	Cape Cod Community College
Daniel	Cojanu	Videographer	UnderCurrent Productions
Lawrence P.	Cole	Retired	GTE Laboratories, Inc.
Daniel	Collins	Sr. Solutions Executive	IBM
John	Collura	Director of the UMass Tran	UMASS
Beth	Colt	CEO	Woods Hole Inn LLC
Amanda	Converse	owner	Shift Eco Boutique
Peter	Cook	Info. Systems Director	Falmouth Public Library
John	Cox	Dr.	Cape Cod Community College
Christine J.	Cox	Principal	Interim CFO Services
Stefanie	Coxe	District Representative	Congressman Bill Keating
Gail	Coyne	Fiscal Manager	Cape Cod Commission
Heather	Crombie		
Joel	Crowell	President and CEO	Cooperative Bank of Cape Cod
Brad	Crowell		
Rob	Culp	Business Solutions Manager	IBM Corporation
Jennifer	Cummings	Ast Development Director	Cotuit Center for the Arts
Ward	Cunningham	Northeast Sales Director	Ciena
David	Curelli		Upper Cape Cod Regional Tech
Sean	Curran		IBM
Suzanne	Currier		Woods Hole Public Library
Eugene	Curry	Attorney	Law Office of Eugene R. Curry
Tim	Curtin		
Robert	Curtis		RTDC
Mary	Czajkowski	Superintendent	Barnstable Public Schools
Patty	Daley	Deputy Director	Cape Cod Commission
Edward	Damphousse	Director of Business Dev	Stateside Construction
Jason	Daniels	Executive Director	Easton Community Access TV
Philip	Dascombe	Senior Planner	Cape Cod Commission
Tony	DaSilva	VP, Sales and Business Dev	CapeNet

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First Name	Last Name	Title	Company
Amy	Davies	Media Specialist	Town of Dennis
Alan	Davis	President & CEO	CapeNet LLC
Roger	Day		ArtsFalmouth
Judith	Day		ArtsFalmouth
Marius	Dehelean	Commercial Lending	TD Bank
Richard	Delaney	President and CEO	Center for Coastal Studies
Gary	Delius	Construction Coordinator	OpenCape, Corp
David	Delvecchio	Director of IT	Town of Mashpee
Doug	Denninger		Douglas E. Denninger, Esq.
Anthony	DePaolo	Chairman	
Philip Jay	Detjens	GIS Analyst II	Cape Cod Commission
Philip Jay	Detjens Jr	GIS Analyst II	Cape Cod Commission
Ed	DeWitt	Executive Director	Assn to Preserve Cape Cod
Laurie	Dickey	Owner	High Pointe Properties
Timothy	Dodd	Local Gov. Program Manager	ANF
William	Doherty	Barnstable County Commiss	Barnstable County
Tricia	Doon	Business Manager	Cape Cod Academy
Bruce	Douglas	Vice President	Natural Systems Utilities, LLC
David	Dow	Head	UUFF Geen sanctuary Committee
Maggie	Downey	Administrator	Cape Light Compact
Catherine	Drouin	Vice President	Green Mountain Communications
Victor	Drouin	President	Green Mountain Communications
Peter	Dubay	General Manager	South Sandwich Village
Terry	Duenas	Exeucitve Director	Cape Cod Community Media Cente
Joseph	Duffin	Client Services Leader	IBM
Robert	Dwyer	President & Executive Dir	Cape Cod Museum of Natural His
FRANK	EDWARDS	Financial Consultant	
Len	Egan	Principal	L J Egan Associates
Chris	Elkins	GIS Specialist	Town of Barnstable
Jeffrey	Elletson	Managing Partner	Murphy RE, Inc.
Ryan	Ellison	Data Analyst	Cape Cod Commission
Richard	Elrick		
Elizabeth	Enos	Regulatory Officer II	Cape Cod Commission
Patricia	Erickson	Branch Manager Falmouth	Cape Cod Five
Bill	Fallon	Financial Advisor	Fallon Financial Services
Robert	Fallon	Senior Systems Engineering	Integration Partners
Bob	Fenstermaker	Training & Program Coord	Falmouth Community Television
Josef	Filipowics		Lower Cape Community Access TV
William	Flynn	Director	Cape & Islands EMS
Pat	Flynn	Barnstable County Comm	Barnstable County
Joseph	Foote	Owner	Joseph Foote Associates
Mark	Forest	Executive Director	The Delahunt Group
Michael	Forgione	IT Consultant	
Ed	Fouhy	Chatham Zoning Board chair	
Tom	Fox	Technology Consultant	
Larry	Fox		To Your Good Health
Emilio	Frazzoli	Associate Professor	MIT

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First Name	Last Name	Title	Company
Michael	Frotten	President	Vidverify
Becky	Fuller	Clinical Liaison	Bayada Home Health Care
John	Fulone	Senior Vice President	The Cooperative Bank Cape Cod
Alisa	Galazzi		Dementia Care Academy
Colleen	Gallagher		
Daniel	Gallagher	CEO	OpenCape
Melinda	Gallant	Property Manager	South Cape Village
Paul	Gandillot		
Edward	Gardella	Retired	Retired
Elizabeth	Gardella		
Katherine	Garofoli	Resource Development	Barnstable County
Gisele	Gauthier		Housing Assistance Corporation
Arthur	Gaylord	Director, IT	Woods Hole Oceanographic
Maggie	Geist		
MARCELLO	GENTILE	DIRECTOR	BAYADA HOME HEALTH CARE
Josh	Giampietro	Developer	Forestdale Village
Bill	Goldenberg		Shoreline Capital
Bill	Goodbody		
Andrea	Goode	Financial manager	Open Cape
James	Goodrich		Goodrich Land Research
Andrew	Gottlieb	Executive Director	Water Protection Collaborative
Robert	Green	Retiree	UMass Dartmouth
Bruce	Greenhalgh	VP Sales	Emerging Technology Group
Nina	Greenwald	Professor	UMASS Boston
Trish	Griffin	Realtor	Robert Paul Properties
Linell	Grundman	Selectman	Sandwich
Lisa	Guyon	Director of Development	Housing Assistance Corporation
David	Hammett	Director of Cash Managemen	Cape Cod Five
Nancy	Hardaway	Consultant	Listening 2 Leaders
Tabitha	Harkin	Special Projects	Cape Cod Commission
Larry	Harmon	Co-Director, Geo-Graphics	Bridgewater State University
Gregg	Harper	Cultural Res. Specialist	Apex Companies, LLC
Ryan	Harrington	Senior Engineer	Volpe
Ryan	Harrington	Senior Engineer	US DOT - Volpe Center
JD	HARRIS		
Perry	Hartswick	IBM Distinguished Engineer	IBM
Joseph	Hawley	Business Development Offic	Cape Cod Five
Shari	Hayes	Commercial Lending Officer	Cape Cod Five
Luke	Hendrik		Aecern
June	Herold		
Todd	Herrmann	Director, Strat. Planning	Southcoast Health System
Paula	Hersey		Penguin Digital Design, LLC
Martha	Hevenor	Planner	Cape Cod Commission
Ginny	Hewitt	Library Director	Brooks Free Library
Amanda	High		
Lee	Hill	Financial Advisor	Edward Jones Investments
Paul	Hilton	Executive Director	Cape Cod Collaborative

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First Name	Last Name	Title	Company
Michael	Hoffman		Comcast Business Services
Sarah	Hoit	CEO	Connected Living
Sheila	Hooceboom	Director	Community Development Partners
Eric	Hoose	Systems Engineer	Ciena
Scott	Horsley	President / Senior Environ	Horsely Witten Group
Scott	Horsley	President	Horsely Witten Group, Inc.
Hartley	Hoskins	Network Group Leader	Woods Hole Oceanographic Inst.
Nancy	Hossfeld		Cape Cod Commission
Joanne	Hovis	President	Columbia Telecommunications Co
Robert	Howard	Principal	Weeset Advisors LLC
Kevin	Howard	Executive Director	Arts Foundation of Cape Cod
Ann	Howe		
Theresa( Terri)	Huff	Community Planner/Advisor	Cape Cod Community College
Elise	Hugus	Editor	InsideOUT Cape Cod/ Enterprise
H. Carter	Hunt, Jr.	VP Defense Sector Initiati	MassDevelopment
Wendi	Huntington	Center Administrator, CIS	WHOI
Beau	Jackett	MIS Director	Town of Provincetown
Erin	Jackson		
H Bert	Jackson		Koa
Bert	Jackson		Koa
Nigel	Jacob	Co-Founder	Office of New Urban Mechanics
CHRISTINA	JACOBI	artist/educator	Art Naturally
Errol	James	Managing Partner	SoundView Partners
Chris	Janson	Sr. Mkt Mgr	Ciena
Diana	Jennings	Director Regional Outreach	Bridgewater State University
Angus	Jennings	Director of Land Use Mgmt	Town of Westford
Sarah	Johnson		etruro.com
Richard	Johnson	Water Systems Consultant	Utility Service Co. Inc.
Paula	Johnson		Sandwich Community Television
Richard	Jubenville	Vice President	AECOM
Ellen	Kagan	Author/TV Host/Producer	Health Care:Choice or Chance?
Patrick	Kane	SVP, Marketing & Comm	Cape Cod Healthcare
BRIANA	KANE	SR. RESIDENTIAL PRGM COORD	CAPE LIGHT COMPACT
David	Kaplan		
Peter	Karlson		NeuEon Inc.
Peter	Karlson	Entrepreneur in Residence	Cape Cod Chamber of Commerce
Peter	Karlson	President/CEO	NeuEon Inc.
Bill	Kelly	Managing Partner	FIR PR
Chris	Kelly	Volunteer Camera Operator	Falmouth Community Television
Jennifer	Kelman	Clinician	High Point Health System
John	Kennan	Attorney	
Kirk	Kilenbrander	VP & Secretary of Corporat	MIT
John	Kilroy		Economic Development Council
Tim	King	Asst. Town Administrator	Town of Wellfleet
Dana	Kirby		Netversant
Kathleen	Kirby	Executive Director	CONNECT

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First Name	Last Name	Title	Company
Nate	Knight	Product Marketing Mgr	Convention Data Services
Kirk	Kolenbrander	VP & Secretary of the Corp	MIT
Sarah	Korjeff	Preservation Specialist	Cape Cod Commission
Paul	Lagg	GIS Coordinator	Town of Chatham
John	Landry	CEO	Lead Dog Ventures
Mark	Larochelle	Director	ColoSpace
first	last	title	Convention Data Services
Judith	Laster	Executive Director	Woods Hole Film Festival
Michael	Lauf	President and CEO	Cape Cod Healthcare
Alecia	Lebeda	Production Coordinator	Falmouth Community Television
Priscilla	Leclerc	Senior Trans Planner	Cape Cod Commission
Laurie	Leitner	Program Manager	IBM
Susan	Leven	Town Planner	Town of Brewster
John	Lipman		LIPMAN DEVELOPMENT STRATEGIES
Andrew	Lowenstein	President	Connected Living
Robert	Loyot	Director of IT	Marine Biological Lab
Hadley	Luddy	Executive Director	Big Brothers Big Sisters
Kevin	Lynch	Volunteer camera operator	Falmouth Community Television
Sheila	Lyons	Barnstable County Comm	Barnstable County
Melissa	Macaulay Federico	CEO	B2B Brands
Kristen	MacDonald		Convention Data Services
Molly	MacGregor		Sun Self Storage
Cate	MacGregor		
Shawn	MacInnes	IT Director	Town of Yarmouth
Marcia	MacInnis		
Paula J.	Magnanti, MT(ASCP)	Founder & Chief Healthcare	Strategic Healthcare Solutions
Steve	Mague	Senior Project Manager	Durand & Anastas Env Strategy
Michael	Magurie		Cape Cod Cooperative Extension
Hilde	Maingay		CEES
Lynn Grant	Major	Director of IT	Town of Falmouth
Lev	Malakhoff	Sr.Transportation Engineer	Cape Cod Commission
Vic	Mankiewicz	Retired/health care	
Margaret	Mankiewicz	Retired/health care	
Vincent	Manoli	Director, Bus Development	UC Synergetic
Vicki	Marchant	C&I Program Analyst	Cape Light Compact
Todd	Marcus	Brewmaster/President	Cape Cod Beer
Rory	Marcus	Consultant	Today s Communications
Cathy	Marques	Business System Manager	Town of Falmouth Public Works
Sherry J	Martin		
Teresa	Martin		CapeNet
Vincent	Mascio	State Contractor	Comtronics
Michael	Mathewson	General Manager	McLane Research Labs Inc
John	MaWhinney	Sr Manager of Tech Ops	Comcast
Scott	McCabe	Enterprise Account Exec	Comcast
Garrett	McCarey	Executive Director	Lower Cape TV
John	McCormack	Yarmouth Representative	Cape Cod Commission

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First Name	Last Name	Title	Company
Joan	McDonald	Director of Youth Services	Cape & Islands Workforce Inves
Georgia	McDonald		WCAI
Jerry	McEleney	Consultant	Unified telephone
Heather	McElroy	Natural Resources Speciali	Cape Cod Commission
RJ	McGrail		MassDevelopment
Anne	McGuire		Cape Cod Commission
Christopher	McGuire	Marine Director in MA	The Nature Conservancy
Taree	McIntyre	Administrative Assistant	Cape Cod Commission/CCEDC
Lauren	McKean	Park Planner	Cape Cod National Seashore
Jim	McKenzie	CIO	Gosnold
James	McNamara	Dir of New Program Develop	Hospice and Palliative Care
Raymond	Medeiros	Director of IT	Town of Chatham
Todd	Mello	CFO	Granit Block Global DC, Inc.
Andrea	Melvin		WIB
James	Merriam	Town Administrator	Town of Harwich
Alicia	Messier	GIS Support Specialist	Town of Dennis
Scott	Michaud	hydrologist	Cape Cod Commission
Jennie	Mignone		Lower Cape Community Access TV
Thomas	Milkey		Cape Cod Community Media Cente
Susan	Miller	VP Academic Affairs	Cape Cod Community College
Jo Anne	Miller Buntich	Director,Growth Management	Town of Barnstable
Barbara	Milligan	CEO	Historic Highfield, Inc.
David	Mitchell		Fairwinds Clubhouse
Spyro	Mitrokostas	Assembly of Delegates	Barnstable County
Riley	Moffatt	Program Specialist	Barnstable County AmeriCorps C
Mark	Montgomery	Industry Specialist	Green Mountain Communications
Ken	Moraff	Deputy Director	EPA,Office of Eco Protection
John	Morse	Director of IT	Barnstable County
Mary	Mulloy	President	Abacus Group, Inc.
Patrick	Murphy		MarketLaunchGroup.us
Sarah	Murphy	Reporter	The Bulletin
Chris	Murray	Communications Engineer	NSTAR
Ahmed	Mustafa	Chair	Falmouth Community Television
Stephanie	Nadolny		Spaulding Cape Cod
Emily	Nagle Green	CEO	Smart Lunches, LLC
Allan	Nardini	Sr. Account Exec,	Comcast
Linda	Navarro		Woods Hole Film Festival
Sarah	Nelson	Channel 18 Producer/Host	Town of Barnstable
Mark	Nelson	Principal	Horsley Witten Group, Inc.
Andrew	Newman	Owner	Andrew Newman Design
Lynn	Nicholas	President, CEO	Mass Hospital Association
Andrew	Nicholl		ArdRed
Herb	Nichols		
Herb	Nickles	Capital Projects Advisor	Mass. Broadband Institute

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First Name	Last Name	Title	Company
Paul	Niedzwiecki	Executive Director	Cape Cod Commission
Van	Northcross	Community & Government Rel	Cape Cod Healthcare
Wendy	Northcross	CEO	Cape Cod Chamber of Commerce
Bonnie	Nowik Cohen		
Sharon	Nunes	VP Gov t & Smarter Cities	IBM
Gerry	Nye	State Committeeman	MASS GOP
Katy	O Connell	CIO	CHC of Cape Cod
Clare	O Connor	Director Econ. Initiatives	Cape Cod Chamber of Commerce
MARY	O KEEFFE	SR. MANAGER, GOVT. AFFAIRS	COMCAST
Frederick	O Regan	CEO	IFAW
Beth	O'Rourke	Executive Director	Provincetown Community Televis
Sean	O'Brien	OpenCape Treasurer	
John D	OBrien	Economic Development Coord	
JOANNE	OKEEFE	CCC	TOWN OF SANDWICH
Marie	Oliva	President & CEO	Cape Cod Canal Region Chamber
Ernie	Oliveira	Lead Consultant	DEO Associates
Damon	Ollerhead	CEO	Blink 5, Inc.
Bethann	Orr	Director of Technology	Barnstable Public Schools
Craig	Orsi	Manager	Orsi & Company, LLC
Chris	Osgood	Co-Founder	Office of New Urban Mechanics
Marsha	Ostrer		Family Mediation of Cape Cod
Kathy	Palmer	Legislative Aide	Rep. David T. Vieira
Liz	Pape	President and CEO	Virtual High School
John	Pappalardo	CEO	Hook Fisherman Assco.
Sarah	Peake	State Representative	
Felicia	Penn	CCEDC Vice Chair	
Sandy	Perez		Cape Cod Commission
Meagan	Perry		
Carl	Persson	Founder	Creek Power
Lois	Peters	Professor	Rensselaer Polytechnic Inst
Steven	Peters	Marketing Manager	Cooperative Bank of Cape Cod
Darrel	Peterson	Lead Engineer	NSTAR
Phillip	Petru	Head of School	Cape Cod Academy
Joe	Piccirilli	Board of Directors	Cape Cod Community Media Centr
Richard	Pleffner		
Allyson	Pocknett	Administrative Assistant	OpenCape Corporation
Richard	Pommet	President	Nelson Communications, Inc.
James	Poplasky		
Anna	Poplasky		
Martha	Powers		
Steve	Powers	Developer	Forestdale Village
Don	Powers	Architect	Union Studio
Chris	Powicki	Principal	WEEinfo Services
Janet	Preston	Executive Director	Cape Cod Maritime Museum

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First Name	Last Name	Title	Company
Nicole	Price	Staff	Cape Light Compact
Paul	Pronovost		Cape Cod Times
Thomas	Pucci	Operations Manager	Town of Falmouth
Donald	Quenneville	Principal	Great Pointe Consulting
Maryclare	Querzoli	Client Manager	IBM
David	Quinn	Waste Reduction Planner	Barnstable County
Gordian	Raacke	Executive Director	Renewable Engery Long Island
Ivan	Rambhadjan		Cape Cod Community Media Cente
Jari	Rapaport	CoChair, County Committee	League of wome Voters
Christina	Rawley		Falmouth Climb to Action Team
PETER	READ	DIRECTOR OF IT	CAPE COD HEALTHCARE
Andrea	Reed	Advisory Board	Orleans Community Partnership
David	Rehm	CEO	Hospice and Palliative Care
David	Rehm	President/CEO	Hospice and Palliative Care of
Jessica	Rempel	Regulatory Officer	Cape Cod Commission
Katie	Resnick	Environmental Planner	Horsley Witten Group
Anne	Reynolds	GIS Department Manager	Cape Cod Commission
Wil	Rhymer	Branch Manager Wellfleet	Cape Cod Five
Frederick	Rice	President	The Nauset Group, Inc.
Leslie	Richardson	Economic Development Offic	Cape Cod Commission
Scott	Ridley	Principal	Ridley & Associates
Sallie	Riggs	Executive Director	Bourne Financial Develop t Cor
Charlie	Ritch	Owner	Ritch Financial Solutions
Gary	Ritter	Director Tech Group	Volpe
Cliff	Robbins	Sr. Management Advisor	MSBDC
Debra	Rogers	Executive Director/CEO	Falmouth Community Television
Susan	Rohrbach	District Director	Senator Dan Wolf
Cheri	Rolfes		Senator John Kerry
Sharon	Rooney	Chief Planner	Cape Cod Commission
Lisa	Rowell		Sutter for Congress
Richard	Roy	Commissioner	Cape Cod Commission
Beth	Russell	President	Servpro of Cape & Islands
Stephen	Russell	Alternative transportation	Stae of MA DOER
Warren	Rutherford	Owner	The Executive Suite
Geraldine	Ryan		
Anthony	Sadera	Director of Operations	Falmouth Community Television
Rasa	Salerno	Executive Assistant	Cape Cod Chamber of Commerce
David	Sampson	CEO	Cloud Provider USA, LLC
Linda	Sandhu	Communications Director	Cape Cod Community Media Cente
Joseph	Santangelo		
Gray	Saunders	Executive Account Manager	Integration Partners
Dorothy	Savarese	President/CEO	Cape Cod Five Cents Savings Ba
Gerald L	Schmeer Jr	Entrepreneur	
Nancy	Schmidt	Vice President	Spaulding Rehabilitation Netwo
Nancy	Schmidt	Vice President	The Spaulding Rehab Network



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First Name	Last Name	Title	Company
Paula	Schnepp	Executive Director	Sandwich Housing Authority
Clay	Schofield	Tranportation Engineer	Cape Cod Commission
David	Schropfer	Town Moderator	Town of Eastham
Michael	Scott	Esq.	Nutter, McClennen & Fish, LLP
Paul	Sebra	Registered Representative	New York Life
Diane	Secours	Systems Manager	CLAMS
Mary Jo	Seguin	Director	Bayada Home Health Care
Florence	Seldin	Board of Selectmen	Town of Chatham
Kristy	Senatori	Chief Regulatory Officer	Cape Cod Commission
Ed	Senteio	Finance Department	Town of Yarmouth
Yasmina	Serdarevic		Sutter for Congress
Craig	Settles	Host	Gigabit Nation
Bob	Shea	GIS Coordinator	Town of Falmouth
Michael	Sheridan		
Chuck	Sherwood	Senior Associate	TeleDimensions, Inc.
PAUL	SIELOFF	TOWN ADMINISTRATOR	TOWN OF WELLFLEET
Shannon	Silvus	CTO	CapeNet
Shannon	Silvus	CTO	CapeNet
Jack	Slavin	MIS Director	Town of Eastham
Sidney	Snow	President	Snow s Home & Garden
Don	Snyder	Controllor	Green Mountain Communications
Ken	Sommer	Partner	B2BCFO
Patti	Sowpel		Northside Hair Company
Ellen	Spear	Executive Director	Heritage Museums & Gardens
Stephen	Spitz	Regional Manager	Cape Cod Five
Charles	Spooner		
Linda	Steele	Branch Manager Mashpee	Cape Cod Five
Judy	Sterling	VP, Marketing	CapeNet
Thomas	Stone	Sr. Research Assoc.	Woods Hole Research Center
Maegan	Storey	Membership Director	Cape Cod Chamber of Commerce
Timothy	Sullivan	Municipal Liaison (ITD)	Commonwealth of MA
Carol	Summersall	Community Director	Cape Cod Healthcare
Julian	Suso	Town Manager	Town of Falmouth
Sam	Sutter	District Attorney	Bristol County
Richard (Dick)	Swee		EDR, Inc.
Elaine	Swee		EDR, Inc.
Jessica	Sylver	President & CEO	Hyannis Area Chamber of Commer
Jocelyn	Talbot	Vice President, Sales	RetirementJobs.com
Robert	Talerman	EVP, COO	Cape Cod Five Cents Savings Ba
Jill	Talladay		CARE for the Cape & Islands
Bruce	Taylor	President & COO	Police Central, Inc.
Harry	Terkanian	IT Director	Town of Truro
Thomas	Tilas	Vice President	Aecom
Andy	Tircca	Owner	SBS Equine Products
Bruce	Tobey		Pannone Lopes Devereaux & West
Mindy	Todd	producer	wcai
Steve	Tom		Intelligent Community Forum

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First Name	Last Name	Title	Company
Billy	Traverse	Network Administrator	Barnstable County
Mike	Trovato	Economic Development	Town of Barnstable
Michael	Tulman CPA, CVA	Principal	Michael M. Tulman CPA, CVA
David	Tunney		
Steven	Tupper	Technical Services Planner	Cape Cod Commission
eric	turkington	chair	falmouth water quality managem
Peter	Ubertaccio	Director of Martin Inst.	Stonehill College
Judith	Underwood	President	Brown To Green Solar
Anne	Van Vleck	Executive Director	Cape Cod Young Professionals
David	Vieira	State Representative	Third Barnstable District
Rob	Vinciguerra		Sandwich Community Television
Donna	Walcovy	Cemetery Conservator	Marking Burials
Debra	Walsh	Field Marketing Officer	Cape Cod Five
Michael R.	Walsh (Mike Walsh)	n/a	n/a
Allen	Wannamaker	Director of Marketing	Cape Cod Five
Mark	Watson	CEO/CIO Portfoilo Manager	Keel Asset Management LLC
Teno	West	ESq.	Pannone Lopes Devereaux & West
John	Wheeler	Managing Partner	Wheeler Performance Group
Peter	White	Managing Partner	La Plaza Del Sol Motel
Jessica	Wielgus		
David	Willard	VP, Dir. of Community Rela	Cape Cod Five Cents Savings Ba
John	Williams		Koa
Naomi	Wilsey	Senior Marketing Manager	IBM
Dan	Wolf	State Senator	Cape & islands District
Priscilla	Wrenn		Cape Cod Chamber of Commerce
Elizabeth	Wurfbain		Hyannis Main Street BID
Geoff	Wyman	Government Access Coord	Falmouth Community Television
Marcelo	Xavier		DeCOR Painting Co.
Kathy	Zagzebski	President & Exec Director	National Marine Life Center
Bob	Zakarian	President and CEO	Community WISP, Inc.
Bill	Zammer	Princpal	Cape Cod Restaurants
Jay	Zavala	President	Falmouth Chamber of Commerce
Ron	Zweig		Falmouth Water Quality
Jennifer	TRUE	Workforce Education	Cape Cod Community College



CAPE COD  
COMMISSION

## Appendix 3: CEDS Workshop Invite, Attendees, and Presentations

Comprehensive Economic Development Strategy (CEDS)  
Update Workshop:

# HELP US GET OUR PRIORITIES STRAIGHT!

THE CAPE COD COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS) is one key to unlocking the economic potential of the region. The CEDS, compiled by economic and business experts from across the Cape, shapes the direction of economic growth and influences some of the opportunities we have to attract federal funds to the area every five years.

We need your help in evaluating CEDS progress to date and identifying the top regional priority projects as we go forward! Please come armed with your fresh ideas to our workshop:

**Tuesday, May 22, 2010**

**1:30 – 5:00 p.m.**

**Chatham Community Center**

702 Main Street, Chatham, MA 02633 - (508) 945-5175

We will be armed with our own ideas fresh on the heels of the SmarterCape Summit, held just one week before this workshop. Our May 22<sup>nd</sup> agenda includes:

- A Review the CEDS Purpose and Goals
- An Economic Briefing: Regional Benchmarks and Cape Cod Town Profiles
- A Presentation about the Cape Cod Business Survey (conducted winter/spring 2012)
- A Review of Existing Regional Priority Projects
- A Discussion of Project Proposals from the SmarterCape Summit
- An Exercise to Reset Priorities for the Remaining Two Years of the Five-year CEDS

RSVP to Cape Cod Commission Chief Economic Development Officer Leslie Richardson ([lrichardson@capecodcommission.org](mailto:lrichardson@capecodcommission.org)) by **Friday, May 18**.



The workshop is sponsored by the Cape Cod Commission  
and the Cape Cod Economic Development Council.



# CEDS Workshop Invite and Attendee List

## May 22, 2012

Y		NAME	AFFILIATION	CEDS
Y-t		Joanne O'Keefe		SmC Development
Y-t		John Campbell	Partners Healthcare	SmC Healthcare
Y-t		John Kilroy	Cape Cod Economic Development Council	Sector
Y	✓	Abigail Adams		SmC Education
Y	✓	Bert Jackson	KOA Media	ICF Award
Y	✓	Chris Powicki	CIREC	Infrastructure
Y	✓	Christine Cox		SmC Summit
Y	✓	Chuck Sherwood		SmC Economy
Y	✓	Clay Schofield	CCC	Infrastructure
Y		Doug Storrs	Mashpee Commons	Bus Climate
Y	✓	Ed DeWitt	Assoc. to Preserve CC	Bus Climate, Sector
Y		Elizabeth Wurfain	Hyannis Main Street BID	Bus Dev
Y		Elliott Carr	Cape Cod Five	Bus Climate
Y		Eugene Curry		SmC Economy
Y	✓	Felicia Penn		CCEDC
Y	✓	Florence Seldin	Chatham BOS	Sector
Y	✓	Gail Azulay	Cape Light Compact (M. Downey added)	Infrastructure
Y	✓	George Mesurvey		Town Planner
Y	✓	Jari Rapaport		SmC Government
Y		Jillian Douglas		Town Planner
Y	✓	Jo Anne Miller-Buntich	Dir. Growth Mgmt, Town of Barnstable	Bus Climate
Y	✓	John Harris	Cape Cod Commission	Bus Climate
Y	✓	Kristy Senatori	Cape Cod Commission	
Y	✓	Larry Cole	Harwich BOS	Bus Climate
Y	✓	Len Short		CC Commissioner
Y	✓	Leslie Richardson	Cape Cod Commission	
Y		Lisa Franz (will be late)		Local Chamber
Y		Mark Ells	DPW Dir. - Town of Barnstable	Infrastructure
Y		Marsha Ostrer		SmC Environment
Y	✓	Mary Corr		Local Chamber
Y		Mary Pat Flynn	County Commissioner, CCEDC	Workforce
Y		Michael Galasso		FEDIC
Y	✓	Nathan Jones		Town Planner
Y		Nicole Price	Cape Light Compact (M. Downey added)	Infrastructure
Y	✓	Patty Daley		SmC Development
Y	✓	Paul Niedzwiecki		SmC Development
Y	✓	Robert Cody	CCCC	SmC Education
Y	✓	Sallie Riggs		BFDC
Y	✓	Sandra Perez	Cape Cod Commission	
Y	✓	Sheila Hoozeboom	LowerCape CDP	Bus Dev
Y	✓	Sue Leven	Town Planner, Brewster	Infrastructure
Y	✓	Sue Miller	CC Comm College	Workforce
Y	✓	Sue Rohrbach		Cape Delegation
Y	✓	Taree McIntyre	Cape Cod Commission	
Y	✓	Terry Whalen		Town Planner
Y	✓	Tony DaSilva	Cape Net	SmC Government
Y	✓	Wendy Northcross	CC Chamber of Commerce	Sector
		Alice Boyd		CCEDC
		Allen White		CCEDC
		Allison Pcknett		Open Cape
		Anne Reynolds		SmC Government

# CEDS Workshop Invite and Attendee List

## May 22, 2012

	Anne Van Vleck	Cape Cod Young Professionals	Bus Dev
	Austin Knight		BOS
	Barry Motta		BFDC
	Bill Doherty	County Commissioner	Bus Climate
	Bill Goldenberg		SmC Development
	Bill Vendt		FEDIC
	Bob Dubois	Yarmouth Chamber of Commerce	Bus Climate
	Bob Dwyer	CC Museum of Natural History	Bus Dev
	Bob Murray	Falmouth Housing Authority	Bus Climate
	Bob Wren		SmC Development
	Brad Crowell		SmC Transportation
	Brian Currie		Town Planner
	Brian Mannel		CCEDC
	Brian Nickerson	Environmental & Readiness Ctr., Camp Edwards	Workforce
	Brooks Bartlett		FEDIC
	Candy Collins-Boden		Local Chamber
	Carol Sherman		MEDIC
	Carol Woodbury	D-Y Reg. School District	Workforce
	Charleen Greenhalgh	Truro - Asst Town Admin.	Infrastructure
	Charles Ritch		SEIC
	Charles Sumner		Town Administrator
	Chris Bailey		SmC Development
	Chris Blood		SmC Development
	Chris Farrell		BFDC
	Cleon Turner		Cape Delegation
	Cliff Robbins	Mass Small Business Dev. Center	Bus Dev
	Coreen Moore		Town Planner
	Curtis Hartman		BOS
	Dan Fortier		Town Planner
	Dan Gallagher		Open Cape
	Dan Wolf	Cape Delegation/CCEDCCod Economic Developme	Bus Climate
	Dana Kirby		SmC Environment
	Daniel Doucette		BFDC
	David Augustinho	C&I Workforce Investment Board	Bus Dev/Workforce
	David Eldredge		FEDIC
	David Gardner		Town Administrator
	David Gardner		Town Planner
	David Isenberg		SmC Environment
	David Peterson		BFDC
	David Schropfer		SmC Education
	David Spitz		Town Planner
	David Vieira		Cape Delegation
	David Willard		CCEDC
	Debra Rogers		SmC Summit
	Demetrius Atsalis		Cape Delegation
	Denise Dever		SEIC
	Diana Duffley	Country Garden	Infrastructure
	Diana Jennings		SmC Education
	Dick Johnson		SEIC
	Dick Krant	Alternative Energy Center	Sector
	Dino Mitrokostas		MEDIC
	Don Keeran		SmC Environment

# CEDS Workshop Invite and Attendee List

## May 22, 2012

	Douglas Lapp		Town Administrator
	Eastham Planning		Town Planner
	Eliza Cox	Attorney	Bus Climate
	Elizabeth Bridgewater	Lower Cape CDP (or staff)	Bus Dev
	Elizabeth Dean		BFDC
	Elizabeth Taylor		CC Commissioner
	Emily Derbyshire		Town Planner
	Erik Tolley		BOS
	Ernest Virgilio		CC Commissioner
	Florence Seldin		BOS
	Frank Pannorfi		BOS
	Fred Chirigotis		BOS
	Frederick O'Regan		SmC Economy
	Gary Delius		Open Cape
	George Dunham		Town Administrator
	Harry Terkanian		SmC Government
	Heather Harper		Town Administrator
	Herb Olsen		CC Commissioner
	Ira Wood		BOS
	Jack McCormack		CC Commissioner
	James McMahon		BFDC
	James Merriam		Town Administrator
	Jane Peters		Local Chamber
	Jay Zavala		Local Chamber
	Jay Zavala	Falmouth Chamber of Commerce/EDC	Workforce
	Jeanine Marshall	Coastal Community Capital	Bus Dev
	Jennifer True		SmC Economy
	Jeremy Gingras		Local Chamber
	Jessica Sylver	Hyannis Area Chamber of Commerce	Bus Dev
	Jessica Sylver		Local Chamber
	Jill Goldsmith		Town Administrator
	Jim Fox		SmC Education
	Jim Russo		Local Chamber
	Jody Shaw		FEDIC
	Joe Longo		BFDC
	John Dorn		SmC Development
	John Ford		BOS
	John Kelly		Town Administrator
	John Kennan		SEIC
	John O'Hara		SmC Healthcare
	John Pappalardo		SmC Economy
	Joseph Santangelo		SmC Summit
	Joyce Mason		Town Administrator
	Judith Underwood		SmC Economy
	Julian Suso		Town Administrator
	Karen Greene		Town Planner
	Kate Bavelock	Sandwich Chamber	Bus Dev
	Kate Bavelock		Local Chamber
	Kathy Zagzebski		SmC Environment
	Katie Clancy		SmC Education
	Kelly Moore		SmC Government
	Ken Cirillo	Cape Cod Economic Development Council	Workforce

# CEDS Workshop Invite and Attendee List

## May 22, 2012


	Kevin Howard	Arts Foundation	Bus Climate
	Kevin Murphy		FEDIC
	Larry Ballantine		BOS
	Lauren McKean	National Seashore	Workforce
	Lee Hill		SmC Development
	Lenore Bavota		SmC Summit
	Leo Cakounes	Cranberry Growers	Sector
	Linda Burt		BOS
	Lynda Wadsworth		Town Planner
	Maggie Downey	Asst. County Administrator	Infrastructure
	Marcello Gentile		SmC Economy
	Margie Fulcher		BOS
	Marie Oliva		Local Chamber
	Martha Gordon		SmC Education
	Martha Powers		SmC Environment
	Mary Lou Palumbo		Local Chamber
	Mary Waygan		Town Planner
	Maryclare Querzoli		SmC Summit
	MaryLou Petitt		SmC Summit
	Matt Weiss		SmC Summit
	Maureen Brenner		SEIC
	Megan Amsler	Self-Reliance	Workforce
	Michael Blanton		CC Commissioner
	Michael Giancola		BFDC
	Michael Joyce		BFDC
	Michael Maguire	Barnstable County Cooperative Extension	
	Michael Scott		SmC Development
	Michael Sullivan		SmC Summit
	Michael Sweeney		SmC Environment
	Michele Ford		BFDC
	Michele Pecoraro	CC Chamber of Commerce	Sector
	Mirande Dupuy		SmC Environment
	Myra Suchenicz		Town Administrator
	Noreen Michienzi		BFDC
	Pat Flynn		BOS
	Patrick Murphy		SmC Education
	Paul Gandillot		SmC Healthcare
	Paul Lagg		SmC Government
	Paul McCormick		BOS
	Paul Parker	CC Hook Fishermen's Association	Sector
	Paul Pilcher	Wellfleet - EDC	Sector
	Paul Rumul		CCEDC
	Paul Sieloff		Town Administrator
	Paula Bacon		SmC Development
	Paula Magnanti		SmC Education
	Peter Dubay		SmC Development
	Peter Graham		CCEDC
	Peter Iodice		SmC Environment
	Peter Karlson	CC Technology Council	Infrastructure
	Peter Norton		BOS
	Peter Ubertaccio		SEIC
	Phil Sisson	CC Comm College	Workforce



# CEDS Workshop Invite and Attendee List

## May 22, 2012

	Priscilla Wrenn		SmC Summit
	Randy Hunt		Cape Delegation
	Rasa Salerno		SmC Summit
	Raymond Medeiros		SmC Development
	Rex Peterson		Town Administrator
	Richard Carlson		BFDC
	Richard Elrick		SmC Environment
	Richard Roy		CC Commissioner
	Richard White		Town Administrator
	Rick Presbrey		CCEDC
	Robert Bradley		CC Commissioner
	Robert Cobuzzi		MEDIC
	Robert Dutch		BFDC
	Robert Shea		SmC Government
	Robert Walsh		MEDIC
	Robert Wren		SmC Summit
	Robyn Simmons		MEDIC
	Roger Putnam		CC Commissioner
	Rory Marcus		SmC Environment
	Roy Richardson		CC Commissioner
	S. Kyle Hinkle		Local Chamber
	Sandy Fife		Town Administrator
	Sarah Peake		Cape Delegation
	Sharon Lynn		Town Administrator
	Sheila Lyons	County Commissioner	Bus Dev
	Sheila Vanderhoef		Town Administrator
	Spyro Mitrokostas		Local Chamber
	Stanley Torrey		SEIC
	Stephen Buckley		SmC Development
	Stephen Spitz		FEDIC
	Susan Gifford		Cape Delegation
	Tabitha Harkin		SmC Economy
	Terri Huff		SmC Economy
	Terrie Cook		MEDIC
	Therese Murray		Cape Delegation
	Tim Cooney		SEIC
	Timothy Madden		Cape Delegation
	Todd Herrmann		SEIC
	Tom Fudala		Town Planner
	Tom Guerino		Town Administrator
	Tom Lynch		Town Administrator
	Tom Mayo		Town Administrator
	Van Northcross	Cape Cod Healthcare	Sector
	Wayne Taylor		BOS
	Wellfleet/info		Local Chamber
	Willaim Hinchey		Town Administrator
	William Locke		BFDC




CAPE COD  
COMMISSION

## Cape Cod Comprehensive Economic Development Strategy (CEDS) Workshop

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Chatham Community Center  
Paul Niedzwiecki, CCC Executive Director







CAPE COD  
COMMISSION

### The Cape Cod Commission

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Keeping a Special Place Special







CAPE COD  
COMMISSION

### Regional Policy Plan – Growth Policy

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“... guide growth toward areas that are adequately supported by infrastructure and away from areas that must be protected for ecological, historical, or other reasons.”

## RPP/CEDS Economic Development Goals



- **Low Impact and Compatible Development**
  - Location of development
- **A Balanced Economy**
  - Nature of development and jobs created
- **Regional Income Growth**
  - Flow of money, goods, and services
- **Infrastructure Capacity**

## Cape Cod Comprehensive Economic Development Strategy



- **What is the CEDS?**
  - Process
  - Plan
- **Why do the CEDS?**
  - Solidify Regional Consensus
  - Expand Regional Collaboration
  - Focus Regional Resources
  - Evaluate Regional Progress
  - Attract Investment



## The CEDS Planning



- **Who did the CEDS?**
  - EDC/CCC Partnership
  - Regional Stakeholders
- **Three Step Process to identify Priority Projects**
  - 5 Working Groups made up of representatives of regional economic development related agencies
  - 3 Focus Groups made up of small businesses, large businesses, and elected officials
  - 2 Week Public Comment Period

Barnstable County Commissioners  
 Cape Cod Economic Development Council  
 Cape Cod Commission (Members)  
 Yarmouth Chamber of Commerce  
 Falmouth Housing Authority  
 Community Development Partnership  
 Mashpee Commons  
 Association to Preserve Cape Cod - Business Roundtable  
 Town of Barnstable  
 Harwich Board of Selectmen  
 Association to Preserve Cape Cod  
 Cape Cod Museum of Natural History  
 Massachusetts Small Business Development Center  
 Hyannis Area Chamber  
 Cape Cod Chamber of Commerce  
 Coastal Community Capital  
 Hyannis Main St. BID  
 Rudenra Payroll  
 Regional Technology Development Corporation  
 Wise Living  
 Town of Truro  
 Arts Foundation of Cape Cod  
 Tocci, Goss & Lee, PC  
 Cape Cod Technology Council  
 Cape Cod Hook Fishermen's Association  
 Cape Cod Community College

Cape and Islands Renewable Energy Collaborative  
 Hyannis Country Garden  
 NSTAR  
 Cape Light Compact  
 Town of Brewster  
 Town of Eastham  
 Cape Air  
 Dennis-Yarmouth Regional School District  
 Cape Cod Healthcare  
 Housing Assistance Corporation  
 Cape & Island Workforce Investment Board  
 Jeppesen Marine  
 Comcast  
 CIRENEW (aka CIREC)  
 Back Office Associates  
 Barnstable County Commissioners  
 Sencorp Systems, Inc.  
 Cranberry Growers  
 Spaulding Rehabilitation Hospital  
 Alternative Energy Center  
 Wellfleet Economic Development Committee  
 Town of Chatham  
 Business Roundtable  
 Hyannis Main Street Business Improvement District  
 Sandwich Chamber of Commerce  
 Nutter, McClennen & Flah

## CEDS Implementation



- **What is being implemented?**
  - Research & Data Dissemination
  - Ongoing Economic Development Planning & RESET
  - Regional Priority Projects
- **Who is implementing it?**
  - EDC/CCC
  - Regional Priority Project Teams
- **How is it being funded?**
  - CCC Funding
  - EDC Funding
  - EDA Funding
  - Partnerships

## Research & Data Dissemination by the Cape Cod Commission



- ✓ **Myth or Fact Briefs (4)**
- ✓ **STATSCapeCod**
- ✓ **Balanced Economy Benchmarks**
- ✓ **Town Tables and Profile**
- ✓ **2<sup>nd</sup> Home Survey**
- ✓ **Business Survey**



## RESET – Direct Local TA Led by the Cape Cod Commission



- ✓ **Yarmouth**
- ✓ **Bourne**
- ✓ **Sandwich**

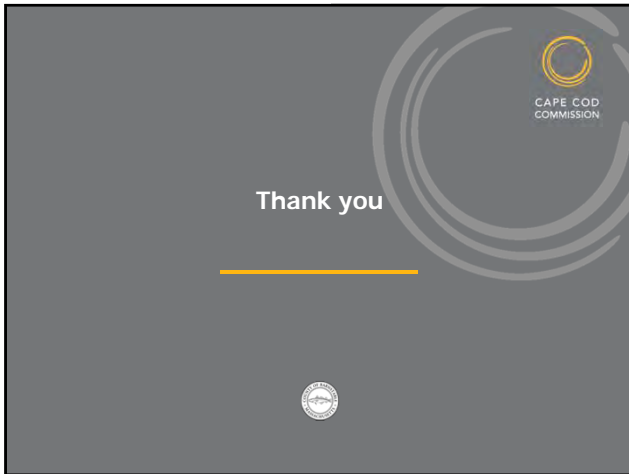


## Regional Priority Projects – Led by the Cape Cod Commission



- ✓ **Coastal Use Templates for Economic Development**
- ✓ **Regional Redevelopment Authority**
- ✓ **SmarterCape Initiative – Strategic Information Office**
- ✓ **Zero Waste (in partnership with the Cooperative Extension)**

<http://prezi.com/mscakm-cnizf/cape-cod-commission-strategic-information-office/>





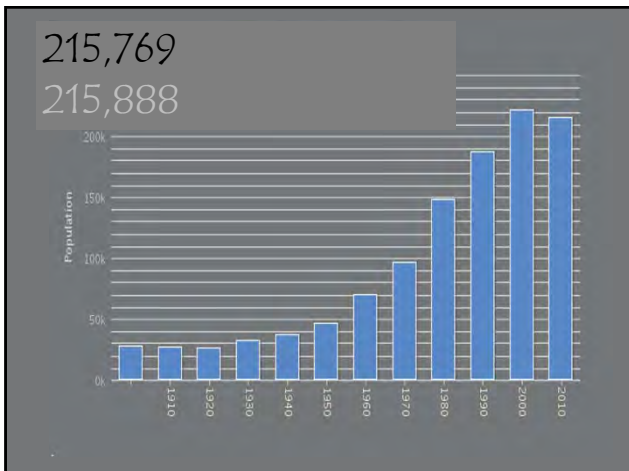
# STATSCapeCod: Understanding Our Region


CEDS Workshop  
Leslie Richardson, CCC Chief Economic Development Officer





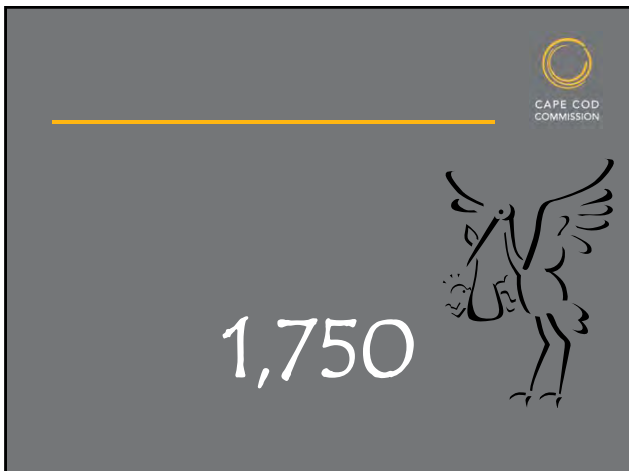
# Cape Cod OUR PEOPLE

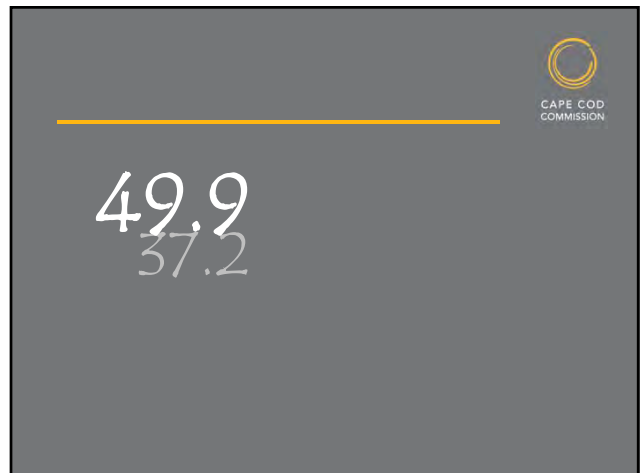
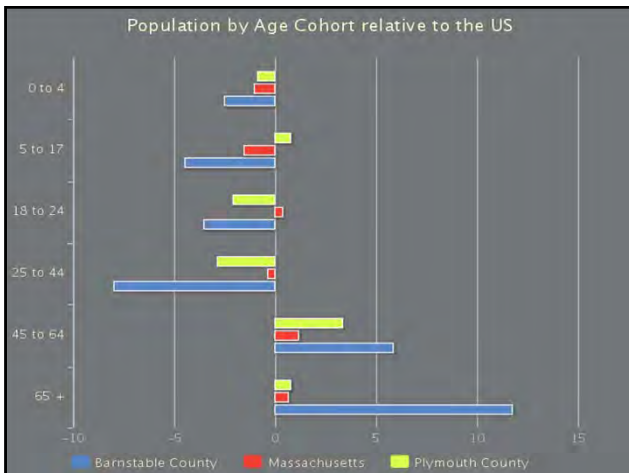




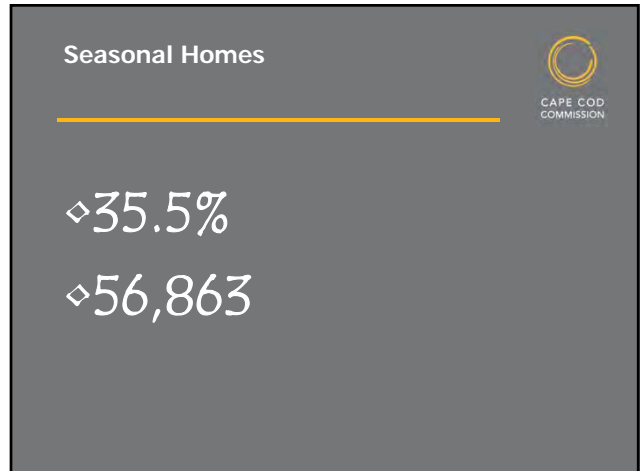
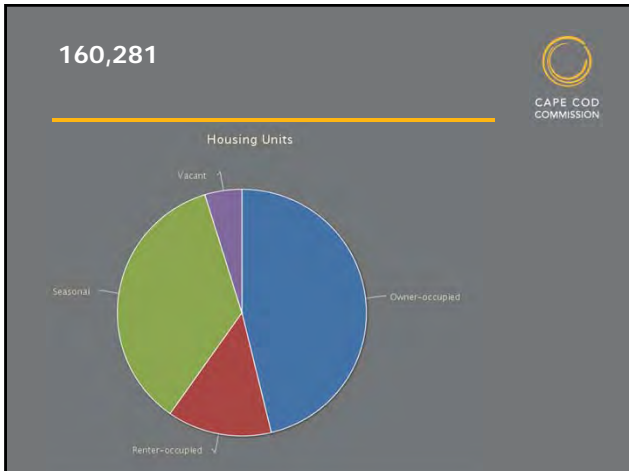
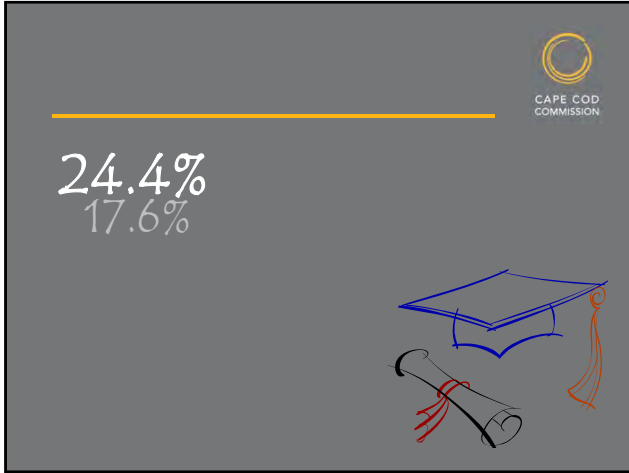
# Decennial Census Population Change

# -2.9%







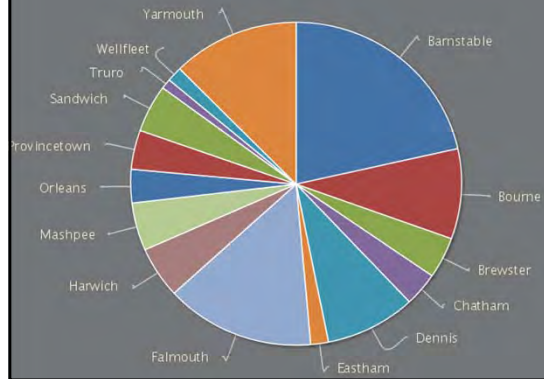


### Rank among US Counties

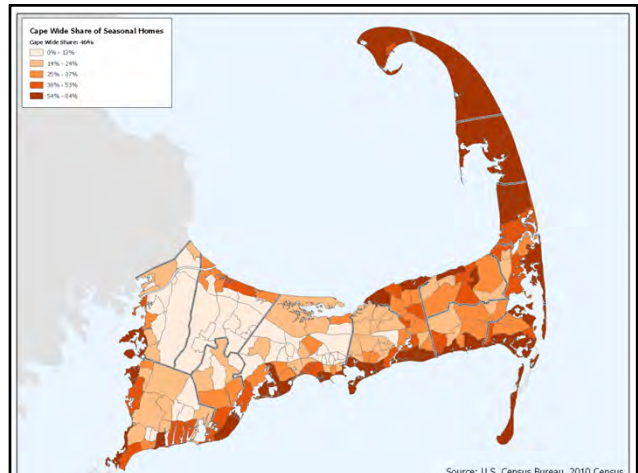
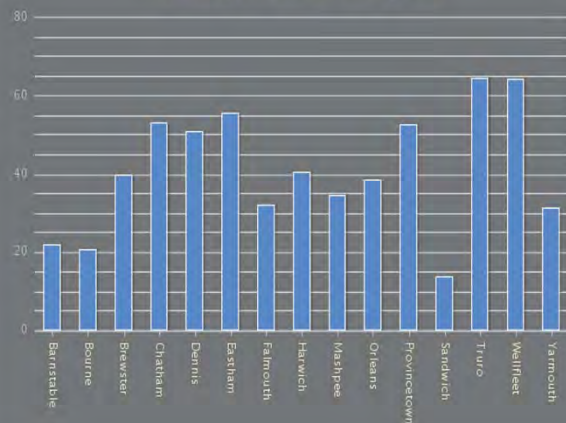


4<sup>th</sup>  
out of 3,141

### Second homes



### Percentage of Seasonal Housing Units



### Average 2<sup>nd</sup> Home Owner on Cape Cod



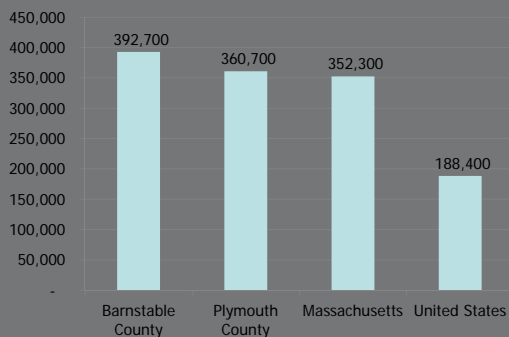
- 71% have their primary residence in New England; including 58% in Massachusetts
- 8% have a permanent residence in Barnstable county
- The median age of respondents is 60
- 79% have a bachelors degree or higher, including 48% that have a graduate degree
- 58% of respondents have a pre-tax household income between \$100,000 and \$500,000

### Rates of Conversion of 2<sup>nd</sup> Homes Predicted by Owners



Percent of Second Homes That May Be Converted to Primary Homes					
Time Frame	Upper Cape	Mid Cape	Lower Cape	Outer Cape	Total
1-5 Years	7.8%	8.5%	9.0%	6.2%	7.9%
6-15 years	12.0%	13.1%	16.3%	14.0%	14.0%
Overall	19.7%	21.3%	24.8%	20.1%	21.5%

### Median Home Price



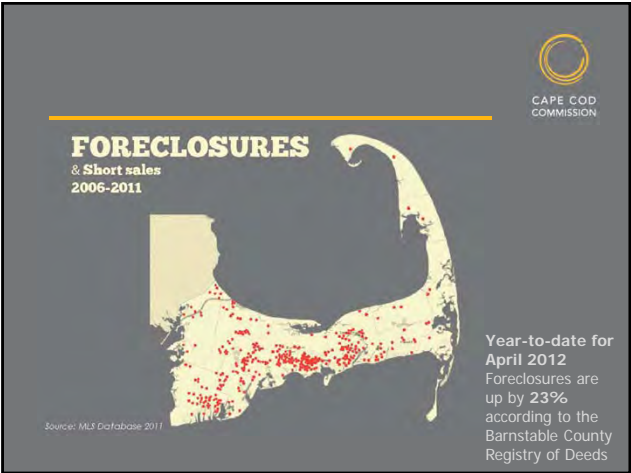
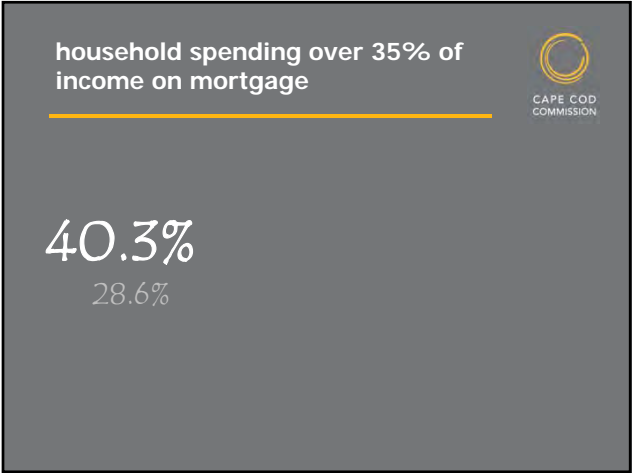
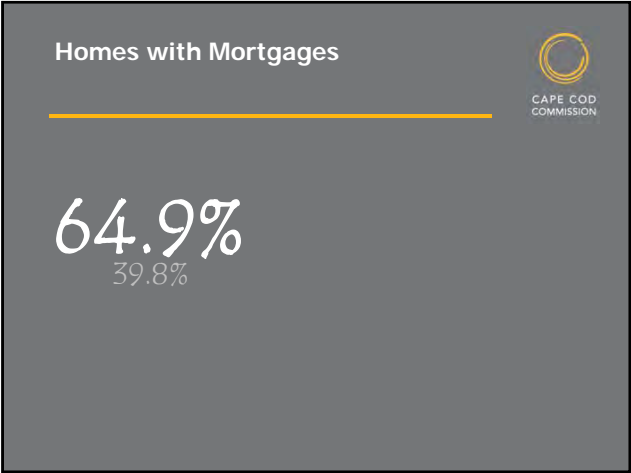
### Houses over \$1 Million

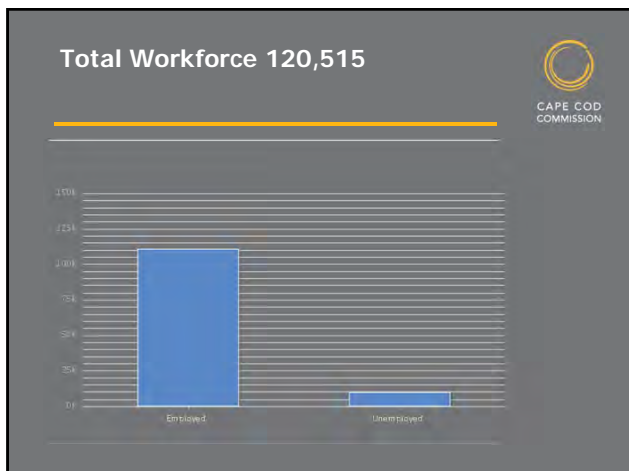
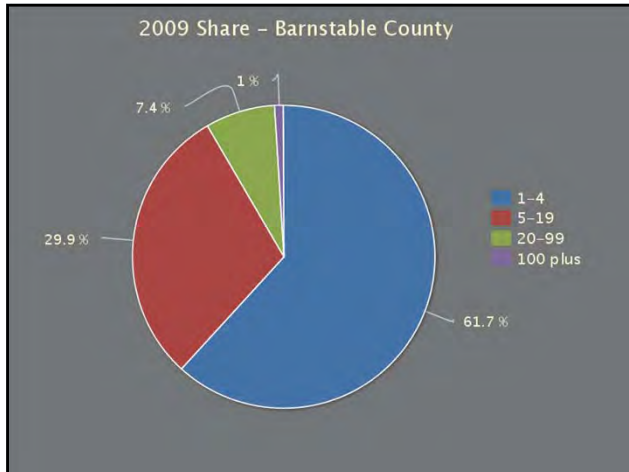


6.2%

2.4%







## Employers

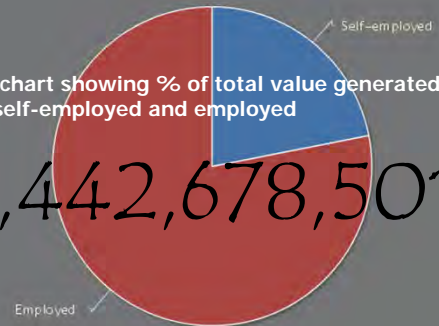


- Estimated number of employers: 9,194
- How many they employ: 88,561
- Value in total payroll 3,469,408,501

39,175

- Pie chart showing % of total value generated by self-employed and employed

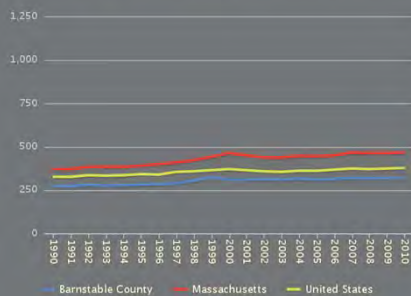
4,442,678,501



## Real Average Weekly Wages



Average Weekly Wages Adjusted for Inflation



## Average Employer Wage relative to the US

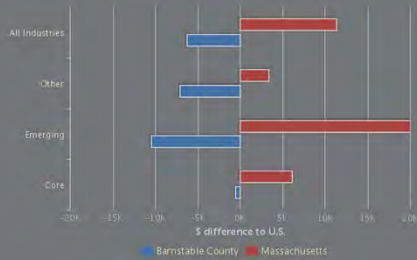


83.8%

## Relative Wages by Sector Grouping



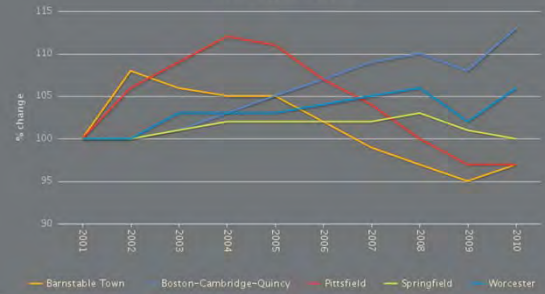
By Industry Cluster Group 2010



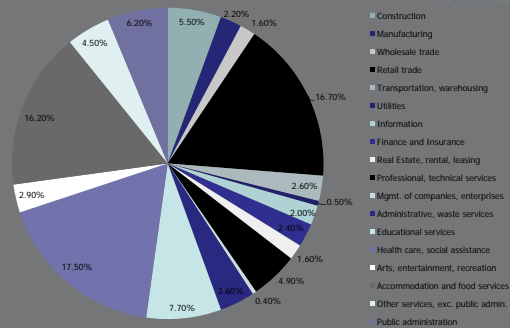
## Gross Regional Product = 7.531B



Gross Regional Product



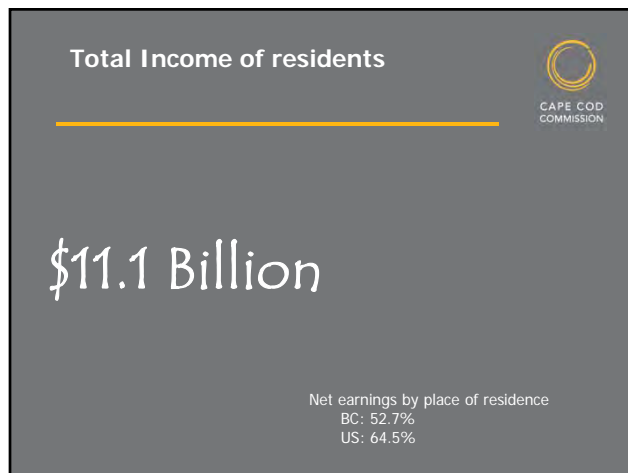
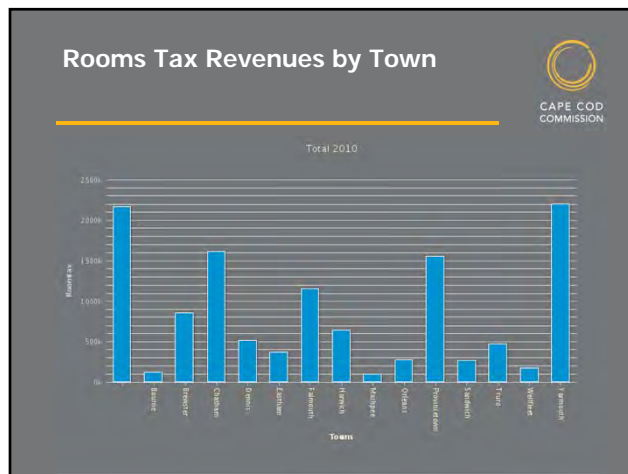
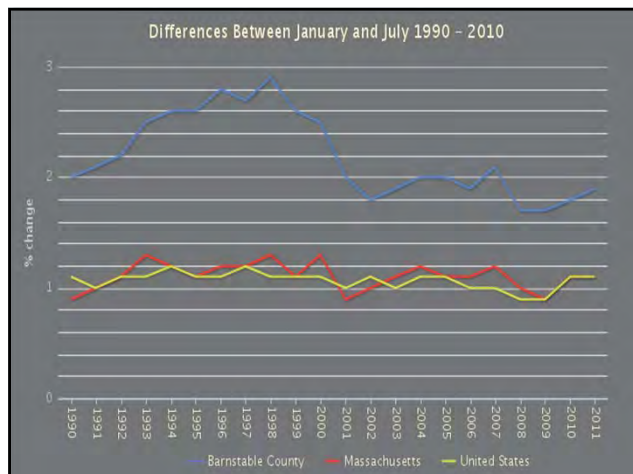
## Employment Distribution by Industry



## Which sector contributes most total wages to the economy



Health Care and Social Assistance  
\$711,875,905



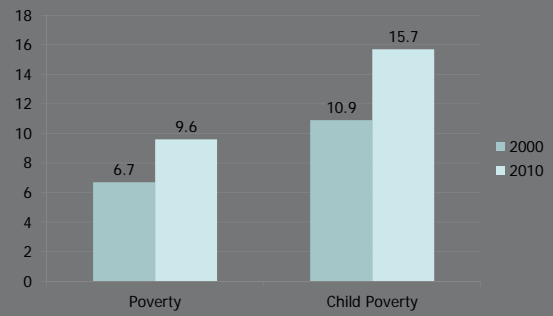


## Incomes



- Per-capita: \$52,798
- Median household income: \$54,871

## Poverty



## Income relative to the US



Cape Cod  
**OUR GOVERNMENT**

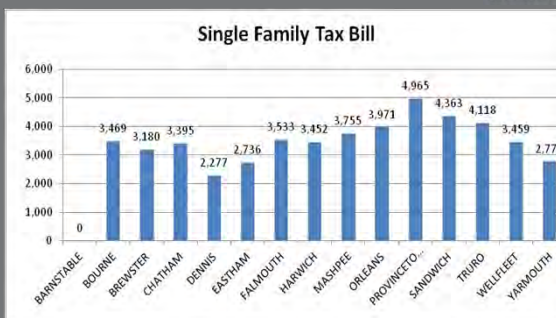
## Property Taxes



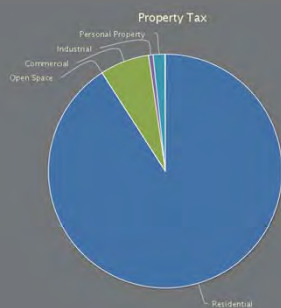
- Total AV: 74,963,763,292
- Total Levy: 537,627,570

0.72%

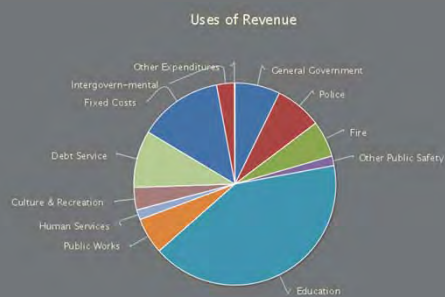
## Average Single Family Property Tax Bill = 4,537

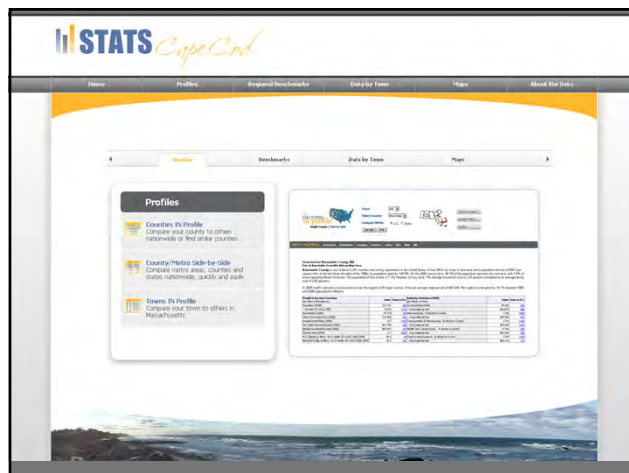
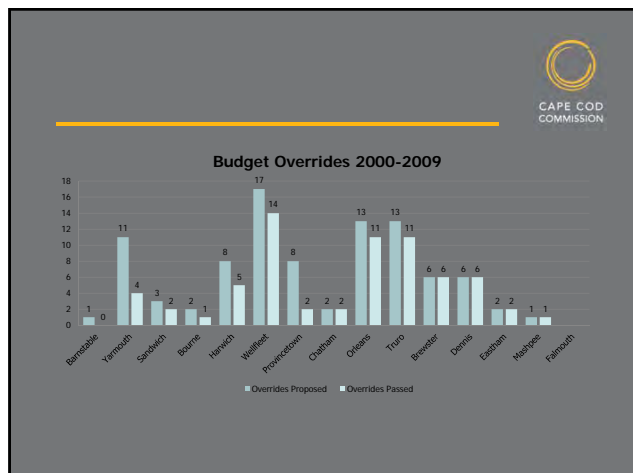
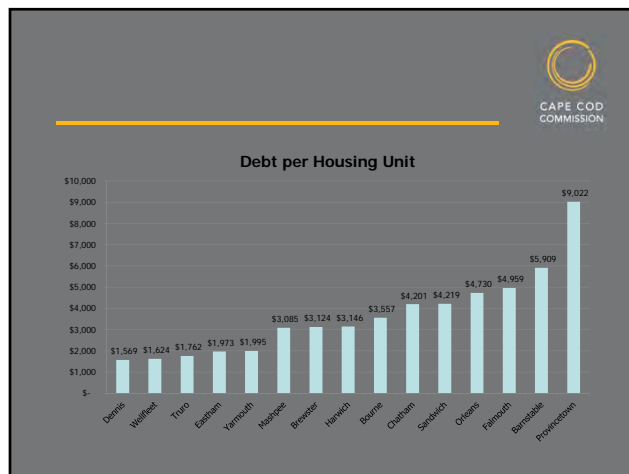
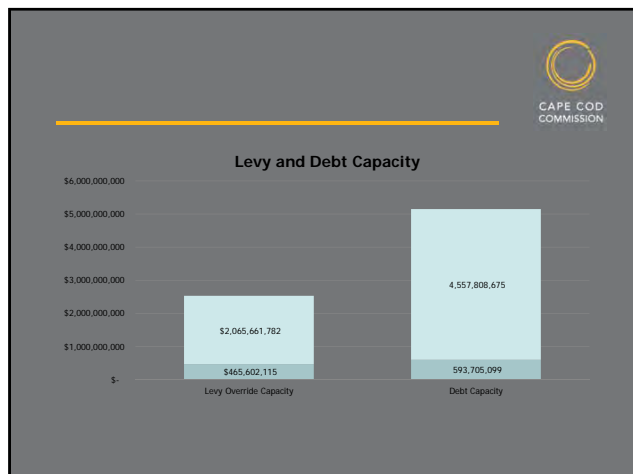


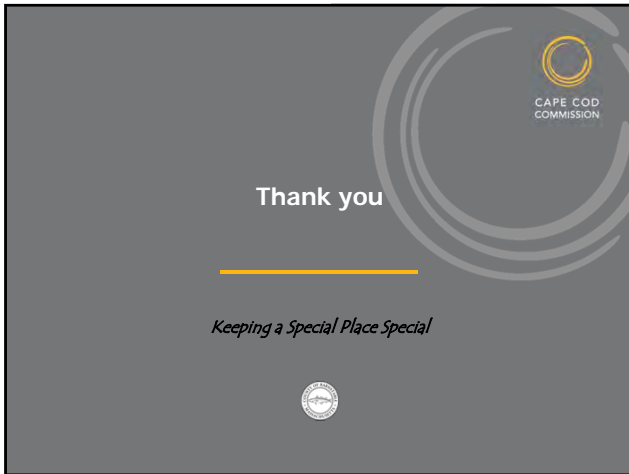
## Sources of Property Tax Revenue




## Uses of Property Tax Revenue










## CEDS Regional Priority Projects

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**Chatham Community Center**  
Leslie Richardson, CCC Economic Development Officer




## Workgroups

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- Infrastructure Development
- Workforce Development
- Sector Development
- Business Development
- Business Climate



## Criteria for Selection

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- **Consistency with RPP Growth Policy**
- **Consistency with ED Goals**
  - Low Impact and Compatible Development
  - A Balanced Economy
  - Regional Income Growth
  - Infrastructure Capacity
- **Likelihood that the project would:**
  - Leverage public and private funding
  - Create higher-wage and higher-skilled jobs
  - Strengthen and expand partnerships and collaboration
  - Integrate the regional economy into the global market
  - Encourage entrepreneurship and innovation



## Categories of Eligible Projects

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- Planning Projects
- Technical Assistance to Businesses Projects
- Capital Investment Projects

## Planning Projects



- Canal Area Assessment & Transportation Improvement
- Coastal Use Templates for Economic Development
- Development in Economic Centers – Cost Analysis
- Redevelopment Authority – Feasibility Analysis
- Specialized 4-year College – Feasibility Analysis
- Waste Minimization: Reduce, Reuse, Recycle

## Technical Assistance Projects



- ADA & Building Compliance Loan Program
- 'Buy Local' Infrastructure Development Project
- Capitalize the Cape Cod Fisheries Trust
- Energy Demand Reduction Program
- Entrepreneurship Capital Access & Training Program

## Capital Projects



- Community Green Enterprise Center
- Emerging Sectors Housing Program
- Homeland Security & Marine Security Testing & Training Program
- Open Cape Telecommunications Infrastructure
- Renewable Energy Generation Program
- Renewable Energy Testing & Training Center
- SmarterCape – Strategic Information Office
- Wastewater in Economic Centers & Villages

## SmarterCape Summit Project Proposals



- **Planning Projects**
  - SmarterVillage Certification Program
  - Unified Resource Plan – Energy & Waste
  - SmarterCape Marketing Program
  - Educational Resources Inventory
  - ITS Implementation Plan
- **Capital Project**
  - Regional Umbrella Services System

## Narrowing Down the List



### Active Projects

- Energy Demand Reduction
- Entrepreneurship
- Open Cape
- Regional \$\$ Authority
- SmarterCape: SIO
- Waste Minimization
- Wastewater in EC
- --
- *RUSS*
- *SmarterVillage Certificate*
- *SmarterCape Marketing*
- *Unified Resource Plan*
- *ITS Plan*

### Listed Projects

- ADA Compliance Loan
- Buy Local Infrastructure
- Canal Area Study
- Coastal Templates
- Community Green
- EC Development Costs
- Emerging Sectors Housing
- Fisheries Trust
- Homeland Security T&T
- Renewable Energy Gen.
- Renewable Energy T&T
- Specialized 4-yr College

## Your Mission



- Prioritize through majority vote the active projects to determine which projects will get precedence over the next CEDS year starting July 1st.

<http://www.successonyourownterms.com/prioritizing-grid>

Thank you



## CEDS Business Survey



CEDS Workshop  
Chatham Community Center



## Purpose

To better understand the opinions of the business community on development and land use issues, and to understand the cost of doing business in Barnstable County and the impediments to business growth experienced by local businesses

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## Methodology – Round One

- **Universe:** 32,535 business entities on Cape Cod (9,194 employers; 23,341 non-employers)
- **Sample:** 17,425 business addresses
- **Responses:** 429 (77.8% of respondents were the owner or operator)
- 2.4% response rate
- 5% margin of error

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## Research Team

- **Cape Cod Planning Team:**
  - Leslie Richardson & Sandra Perez, Cape Cod Commission
  - Wendy Northcross, Cape Cod Chamber of Commerce
  - Elizabeth Bridgewater, Community Development Partnership
  - David Augustinho, Workforce Investment Board
  - Bob Dubois, Yarmouth Chamber of Commerce
  - Michael Galasso, Falmouth EDIC
  - Joy Jordon, Cape & Plymouth Business Magazine
- **Donahue Institute Research Team:**
  - Joseph Wyman, Research Manager
  - Kristen Gibbons, Project Coordinator

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## Research Questions

- What is a typical business on Cape Cod?
- What are the major obstacles to business growth on Cape Cod?
- What are the major expenses for business on Cape Cod?
- Does the business community support the Commission's ideas for economic growth as described in the Regional Policy Plan?

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## Results – Corporate Profile

- 54.9% are family-owned
- 33.4% are sole Proprietor
- 11.6% Traditional C Corporation
- 1/3 are based out of the home

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## Results – Corporate Profile

- 93.6% are independently owned with no parent company
- 4% are Franchise businesses
- 1/2 were established prior to 1995
- 6 started in 19<sup>th</sup> Century

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## Results – Employment Profile

- 90% are open year-round
- 82% are open 40 hours a week or more
- 1/2 said they had two or fewer full-time, year round employees

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### Results – Employment Profile

- 68% are employing the same number of people as last year
- 19.7% plan to increase employment over the next year
- 5.4% expect to decrease employment

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### Results – Business Profile

- 78% have gross revenues of \$50,000 or greater
- 47% used personal or family savings as their main source of capital over the last 5 years
- 29% used personal or business credit cards as their main source of capital

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### Results – Business Profile

- 39.7% describe their customer base as local residents
- 59.5% believe their business will exist on Cape Cod in 10 years

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### Results – Obstacles to Business

- Cost of health insurance – 59% significant barrier
- Cost of living on Cape Cod – 42% significant barrier

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### Results – Obstacles to Business

- Cost of energy - 40% somewhat a barrier
- Finding employees with right skills – 37% somewhat a barrier
- Real estate prices – 35% somewhat a barrier

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### Results – Major Business Expenses

- Health Insurance
- Energy
- Real-Estate

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### Results – Opinion Poll

- 39.3% indicated that the current amount of residential development was adequate; 19% said there was too much
- 16% indicated residential development could increase but it should be limited to specific locations

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### Results – Opinion Poll

- 42% indicated there was adequate or too much commercial development
- 27% indicated more commercial development was needed but should be limited to specific locations

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### Results – Opinion Poll

- 46.3% felt that Cape Cod needs to protect more open space;
  - 33.3% felt current levels of protection were sufficient
- 46% reported that there is adequate protection of historic buildings and locations on Cape Cod;
  - 29% said that Barnstable County needs to do a better job of protecting historic sites

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### Results – Opinion Poll

- 75.3% said that water quality in ponds and coastal waters is a serious or moderate problem
- 80% have a website but only 1/3 sell products over the web

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### Results – Opinion Poll

- 72.2% expressed interest in on-site renewable generation of energy
- 61.5% currently utilize green/sustainability practices; of these respondents 43.5% would participate in a green certification program

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### Full Study

The full study is available on the Cape Cod Commission website; follow this link:

<http://www.capecodcommission.org>

→ economic development data & research

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Thank you

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