



## Barnstable County Economic Development Council (BCEDC)

**Draft Minutes | March 9, 2022 at 5:00 pm.**

Virtual Meeting via Zoom

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**The meeting was held virtually, with members of the Barnstable County Economic Development Council participating remotely, pursuant to Chapter 20 of the Acts of 2021, An Act Relative to Extending Certain Covid-19 Measures Adopted During the State of Emergency, signed into law on June 16, 2021.**

The Chair announced that because the meeting was being held virtually all votes and other actions would be done by roll call. He stated that the members participating remotely would be announced as roll call is taken.

### Attendance

<b>Member</b>	<b>Business Sector</b>	<b>Attendance</b>
Rob Brennan	Construction/Engineering	Absent
Chris Flanagan	Residential Construction	Arrived at 5:06 pm
Kara Galvin	Workforce Development	Absent
Lisa Guyon	Social Services	Present
Tammi Jacobsen	Higher Education	Present
Alisa Magnotta	Social Services	Present
Paul Niedzwiecki	Business Development	Present
Robert Talerman	Banking/Finance	Present
Julie Wake	Arts and Culture	Present
Vacant		
<i>Non-voting members</i>		
Mark Forest	BC County Commissioner	Arrived 5:18 pm
Harold Mitchell	CCC Rep	Absent
John Ohman	Assembly of Delegates	Absent
<b>Cape Cod Commission Staff:</b>		
Kristy Senatori	Executive Director	
Erin Perry	Deputy Director	
Abigail Bliss	Community Dev. Planner	

David Still  
Siobhan Cavacco

Digital Communications  
Administrative Assistant

Other: Evelyn Nelson

### Call to Order

The Chair called the meeting to order at 5:02 pm with roll call.

**Approval of Minutes :** 1/20/2022, 2/1/2022 (Executive Committee), 2/1/2022 (Nominating Committee), 2/4/2022

Upon a motion by Alisa Magnotta, seconded by Bert Talerman, the minutes from the January 20, 2022 BCEDC meeting were approved.

#### Roll Call Vote

Bert Talerman	Yes
Chris Flanagan	Yes
Lisa Guyon	Abstain
Tammi Jacobsen	Yes
Julie Wake	Yes
Alisa Magnotta	Yes
Paul Niedzwiecki	Yes

Upon a motion by Alisa Magnotta, seconded by Tammi Jacobsen, the minutes from the February 1, 2022 BCEDC Executive Committee meeting were approved.

#### Roll Call Vote

Tammi Jacobsen	Yes
Alisa Magnotta	Yes
Paul Niedzwiecki	Yes
Julie Wake	Yes

Upon a motion by Paul Niedzwiecki, seconded by Alisa Magnotta, the minutes from the February 1, 2022 BCEDC Nominating Committee meeting were approved.

#### Roll Call Vote

Tammi Jacobsen	Yes
Alisa Magnotta	Yes
Paul Niedzwiecki	Yes

Upon a motion by Bert Talerman, seconded by Julie Wake, the minutes from the February 4, 2022 BCEDC meeting were approved.

#### Roll Call Vote

Bert Talerman	Yes
Chris Flanagan	Yes
Lisa Guyon	Abstain
Tammi Jacobsen	Yes
Julie Wake	Yes
Alisa Magnotta	Yes
Paul Niedzwiecki	Yes

#### **Business Impact Survey #4:**

Abigail Bliss, Community Development Planner at the Cape Cod Commission, presented preliminary findings from the fourth business impact survey, conducted from November 2021 through January 2022 to evaluate the timing and extent of COVID-19 impacts on businesses and non-profits in the region.

Ms. Bliss said the fourth business impact survey built on the three previous business impact surveys that were conducted in June 2020, September 2020, and January 2021. She said all of the surveys asked about financial, operational, and workforce impacts along with organizations' outlook for future operations. Ms. Bliss said each survey captured a different moment of the pandemic, with the most recent survey focusing on the extended effects, including the impact of summer 2021. She said data from each survey can be viewed at <https://datacapecod.org/>

Ms. Bliss said the fourth survey had a total of 255 respondents with the majority representing for-profit businesses. She said all fifteen towns were represented, with the greatest number of responses from Provincetown, Barnstable, and Brewster. Ms. Bliss said there was a range of industries, with the most common being Restaurants Catering, and Food/Beverage Service, Retail (non-food related), and Arts, Entertainment, Culture. She said, out of the four business impact survey, this survey had the greatest number of responses from Arts, Entertainment, Culture. Ms. Bliss said in previous surveys Accommodations was one of the top three industries.

Ms. Bliss said overall businesses continued to face financial impacts related to the pandemic. She reviewed data that showed businesses and organizations had reductions in revenue in 2020 and 2021 compared to revenue in 2019, with greater reductions reported in 2020 than in 2021. Ms. Bliss said the time stretch with the greatest share of respondents reporting negative impacts to revenue compared to 2019 was Q2 2020 (April-June), with nearly 72% of respondents reporting a decrease. She said by January through March 2021, only 46% of respondents reported a decrease in revenue and, from April through December 2021, 40% of respondents actually reported an increase in revenue.

Ms. Bliss said 82% of respondents reported experiencing an increase in operational costs during the summer of 2021, including cleaning and sanitation costs, wages and hazard pay, and moving their operations online. She said 15% of respondents reported missing payments, with the most common missed payments being rent, taxes, and vendor/supplier bills. Ms. Bliss said, in comparison, 40% of respondents in the third survey reported missing payments.

Ms. Bliss said respondents in the fourth survey reported continuing to make operational adjustments, although disruptions appeared less prevalent in 2021 compared to 2020. She said data indicates businesses/organizations experienced fewer closures in 2021 than in 2020, with 2021 operating months more closely resembling pre-pandemic levels.



Ms. Bliss said the survey shows 52% of respondents were completely open and only 6% were closed due to COVID. She said of those closed because of COVID, 62% planned on reopening. Ms. Bliss said in the third survey, in comparison, only 31% of respondents were completely open and 10% were closed due to COVID. She said the data shows more businesses were open at the end of 2021 than in January 2021.

Ms. Bliss said businesses continued to face pandemic-related operational impacts in the summer of 2021, including an increase in cleaning and sanitation, enforced social distancing & mask regulation, and disruptions in supply chain and/or distribution. She said respondents' mitigation efforts included using personal savings/retirement, federal loans/grant funding, and participating in employee layoff programs, such as the Paycheck Protection Program (PPP).

Ms. Bliss said more than 35% of respondents reported unanticipated positive side effects from the pandemic, including increases in customers or sales, client loyalty and community support, and new or more efficient business operations, including digital operations. She said it would take further analysis to see if these results were concentrated in specific industries.

Ms. Bliss reviewed the workforce impacts and said data from the survey showed many businesses/organizations' workforce had rebounded in 2021 and that challenges to bringing employees back to work, while not uncommon, were also not universal. She said many businesses had approximately the same number of employees by the end of 2021 compared to 2019. She said for each employee type (J1, seasonal local hires, volunteers, etc.), the greatest share of respondents said they had the same number of employees as in 2019.. Ms. Bliss said the majority of respondents reported employees working normal business hours, with a smaller, though still significant, share reporting partial/reduced schedules. She said only around 2% reported furloughed employees and 6% reported having to lay off employees in 2021. She many, though not a majority of businesses/organizations had implemented COVID-19 protocols such as vaccinations, masks, and social distancing for employees returning to work.

Ms. Bliss said challenges to bringing employees back to work were not universal and only a minority reported difficulties.. She said of those who experienced difficulty, the most common challenge was inability to hire enough employees locally, and the most common factors respondents cited as contributing to employees' reluctance to return to work were inability to find available and/or affordable housing, health/safety concerns related to interacting with the public, and current employment insurance exceeds income. Ms. Bliss said this information was based on employer feedback rather than employee feedback.

Ms. Bliss said going forward, many businesses are planning to continue adjusting business operations over the next year. She said the majority of respondents experienced moderate to severe negative impacts from the pandemic, although some experienced positive impacts. She said ongoing non-financial needs for businesses and organizations include labor supply, workforce housing, child and elder care, and clear public health and mask regulations.

Ms. Bliss said the data shows businesses finished 2021 with a stronger financial outlook compared to the beginning of the year. She compared the third and fourth survey responses regarding the ability to operate with current cash flow and said the data indicates a higher number of businesses are forecasting the ability to continue operations indefinitely and a year from now. She said respondents

indicated they will continue making adjustments in 2022, including hiring more employees and expanding online and in-person operations.

Ms. Bliss said these are all preliminary numbers and interactive dashboards depicting this material will be available on <https://datacapecod.org/>. She asked for question and comments from the council.

Mr. Niedzwiecki asked for clarification on the data that shows employee numbers between 2019 and 2022 remained the same, yet labor supply is the number one priority for businesses. Ms. Bliss said they will research this contradiction.

Ms. Magnotta asked if the survey was sent directly to businesses and which towns responded. Ms. Bliss said there was extensive outreach and displayed the presentation slide that showed responses per town.

Ms. Magnotta asked if there were questions regarding employees commuting from off-Cape. Ms. Bliss said they asked for employee type (local hire, international hire, etc.) and perceived reasons employees might be reluctant to return to work. She said she will review the data again to see if commuting was mentioned, although it did not emerge as top reason. Ms. Magnotta said she is curious if there is a correlation between housing and commuting.

There were no additional questions or comments.

## **Early Education & Childcare Needs Assessment**

Erin Perry, Deputy Director at the Cape Cod Commission, provided an overview of a survey-based needs assessment related to early education and childcare throughout Barnstable County, Dukes County, and Nantucket County.

Ms. Perry said Cape Cod has challenges regarding quality affordable childcare and early educational services, which have been exacerbated by the COVID-19 pandemic. She said the challenges have impacted families and providers, as well as the region's economic recovery from the pandemic as businesses need employees to return to work.

Ms. Perry said the Commission received state funding to develop a survey-based needs assessment for Barnstable, Dukes, and Nantucket Counties to build a foundation for improving services. She said there will be two surveys, one for families and one for providers.

Ms. Perry said the Commission is working with organizations in Barnstable County and has contracted with the Rennie Center for Education Research & Policy, a Boston based non-profit organization that has completed similar projects. She said the project completion date is June 2022 and the results will be shared with the council at that time.

Ms. Perry reviewed the project elements. She said they completed a data and document review to get a better understanding of the current state of childcare and early education in the region. Ms. Perry said they are currently in the second stage, which is survey and sampling methodology development. She said the survey for providers will ask about topics including cost, capacity, location, workforce impacts, and days/hours of operation compared to pre-pandemic hours of operation. Ms. Perry said the family

survey will address topics including families' ability to access existing services, families' process to select childcare, issues around the cost of childcare, and demographic information.

Ms. Perry said the survey will be finalized in March and promoted with a variety of different outreach methods. She said there will be paper, digital, and translated options.

Ms. Perry said the Rennie Center will be facilitating focus groups following the survey to make sure they have a representative sample and to clarify survey results.

She said after the surveys are completed, the Rennie Center will complete a gap analysis to identify challenges for providers and families and a spatial analysis to identify underserved areas.

She said they will do a literature review for best practices as well as review case studies that highlight what has been successful in practice.

Mr. Niedzwiecki said the Chamber is sponsoring an Early Education and Childcare roundtable on April 28<sup>th</sup>.

Mr. Talerma asked if they are working with the state's Early Education and Childcare Coalition. He said childcare in Massachusetts is possibly the most expensive nationally and disproportionately impacts families with lower wages. He said it is a major challenge to labor in the region and to families for quality education for their kids. Ms. Perry said they are using data from MA Department of Early Education and the Rennie Center has a good working relationship with the state education department. Mr. Talerma clarified he was speaking of the coalition that is made up of businesses and said he would forward information to Ms. Perry.

Ms. Magnotta said HAC is concerned with the affordability gap as many people seeking assistance have no childcare and are not able to work at full capacity. She asked if the survey could include questions regarding the significance of childcare and the multiplier effect of not having any childcare in the region. Ms. Magnotta also asked if they could collect data on how families make the choice of who is staying home, along with their educational level, and if childcare is the reason they are staying at home. She said that data would be helpful to know the potential available workforce in the region if the childcare issue is resolved. Ms. Perry said she will discuss these issues with the Rennie Center.

There were no additional questions or comments.

## **Cape Cod Commission Executive Director Update**

Kristy Senatori reported on recent staff activities.

Ms. Senatori said they launched <https://datacapecod.org/> and will continue adding information, including narratives for the datasets. She said information from today's business survey presentation will be added to the site, as well as information from the recent homeowner surveys.

Ms. Senatori said all council members should have been contacted to discuss economic resilience strategies to include in the regional economic resilience plan.

Ms. Senatori welcomed newly appointed BCEDC member, Lisa Guyon, Executive Director of We Can. She said Ms. Guyon previously served as a council member a few years ago.

Lastly, Ms. Senatori said the Commission members are exploring returning to in-person meetings and they will be looking into the BCEDC returning to in-person, possibly this spring. She said hybrid meetings are challenging so all in-person is preferred, and she asked for feedback from members.

## **Member Reports**

Bert Talerman provided an update for Cape Cod Five. Mr. Talerman commented on the current geopolitical situation and the potential ramifications for the global economy. He said he thinks we are in for some volatility.

Chris Flanagan provided an update for Home Builders and Remodelers of Cape Cod. Mr. Flanagan said they are exploring a grant opportunity for workforce development with recent high school or college graduates, or individuals making a career change.

Lisa Guyon provided an update for We Can. Ms. Guyon said she was previously on the BCEDC representing Cape Cod Healthcare. She said We Can focuses on women in transition and finding pathways to stability in employment, financial stability, personal relationships, housing, and more.

Tammi Jacobsen provided an update for Cape Cod Community College. Ms. Jacobsen said they are applying for an A+ IT certification and said she needs one or two additional IT employers for the grant application. She asked the council members for suggestions.

Julie Wake provided an update for the Arts Foundation of Cape Cod. Ms. Wake said they completed the contracting phase with state for Creative Exchange funding. She said they also received funding from the Cape Cod Foundation to help support the effort. Ms. Wake said artists in the creative workforce have been participating in virtual and in-person trainings, including a recent webinar on taxes and money for artists.

Alisa Magnotta provided an update for Housing Assistance Corporation. Ms. Magnotta said they launched their ADU program with over 130 households interested. She said that was a much bigger demand than they anticipated. Ms. Magnotta said they launched their Housing to Protect Cape Cod website and encouraged council members to log into the website, as a high membership rate will help with their advocacy efforts. Lastly, she provided an update for their project with the Association to Preserve Cape Cod (APCC). She said two years ago they received funding to build a map of priority zones for natural resources and water quality for building year-round housing. She said the maps are complete and hopefully they will present the information to the BCEDC with APCC in April.

Commissioner Mark Forest provided an update for the County. He said the Commissioners and the BCEDC should discuss priorities of the region and see how they can make an impact. As a selectboard member for Yarmouth, he said housing is a priority, particularly with workforce housing. Commissioner Forest said there are many items that are critical to the region, including workforce development, childcare, and early education and it is all a bit overwhelming.

Paul Niedzwiecki provided an update for the Cape Cod Chamber of Commerce. Mr. Niedzwiecki said they have been working with Expedia, and it appears spring reservations are going to set a record this year. Mr. Niedzwiecki said the Steamship Authority vehicle reservations are booked for the summer. He said they are looking at strategies for labor and continue to work on a housing strategy as inventory under \$500K has dropped by 97%. Mr. Niedzwiecki mentioned the upcoming childcare round table on April 28<sup>th</sup> and said some local municipalities are using funds from their budgets to subsidize childcare. Mr. Niedzwiecki said the BCEDC has the opportunity to broaden advocacy and thanked members of the council for their commitment.

### **New Business**

There was no new business.

### **Adjourn**

Upon a motion by Tammi Jacobsen, seconded by Bert Talerman, the meeting adjourned at 5:58 pm.

### **Roll Call Vote**

Bert Talerman	Yes
Chris Flanagan	Yes
Lisa Guyon	Yes
Tammi Jacobsen	Yes
Julie Wake	Yes
Alisa Magnotta	Yes
Paul Niedzwiecki	Yes

### **List of Materials Used/Presented**

- Business Impact Survey #4 Presentation
- Early Education & Childcare Needs Assessment Presentation