



CAPE COD
COMMISSION

CEDS Annual Report 2020

YEAR ONE | 2019 CEDS UPDATE

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

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Prepared by Cape Cod Commission Staff

CEDS Annual Report 2020

YEAR ONE

The Comprehensive Economic Development Strategy (CEDs) for Cape Cod is the economic development blueprint for the region. It is consistent with the Cape Cod Commission’s Regional Policy Plan that guides land use decisions across the region. The CEDs document lays out a vision for economic development, specific goals and objectives, and an action plan for achieving them. The following annual report outlines the region’s progress toward implementation of the most recent five-year plan completed in 2019.

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Introduction

Cape Cod's economy is linked closely to its environment, its coastal character and natural resources driving its major industries for centuries. The region currently faces economic challenges related to climate change impacts along the coast and the effects of seasonal population changes on its environment and infrastructure. Residents and business owners face unaffordable land and housing values fueled by Cape Cod's unique position as a seasonal and retiree destination. The high cost of living and doing business on the Cape impedes the region's ability to achieve economic resiliency and sustainability.

These challenges also provide opportunities for the region to collaborate, innovate, and lead. The 2019 Comprehensive Economic Development Strategy (CEDS) establishes a five-year action plan that responds to challenges and embraces opportunities to foster a resilient and sustainable regional economy. The strategy is the result of a collaborative planning process, with stakeholders representing an array of economic development concerns facing the region. The following annual report outlines the region's progress towards implementation of the most recent five-year CEDS, completed and approved in 2019.

Economic Trends on Cape Cod

This annual report highlights some of the economic challenges and advantages Cape Cod faces. Some of the key trends include:

- Cape Cod's population has slightly declined in the past ten years, with 213,690 residents in 2018. Young adults continue to be under-represented on the Cape compared with the rest of the state and US, while the number of retired adults continues to be above-average compared with the state and US. ([Population Diversity](#))
- Following the Great Recession of 2008, the region has seen an increase in real GDP, as well as growth in jobs, businesses, and household income ([Wage Diversity](#), [Productivity](#), [Employment Diversity](#), [Business Diversity](#))
- The recession led to an increase in the conversion of year-round homes to second homes, as urban areas (Boston and New York) recovered faster than Barnstable County. ([Housing Diversity](#))
- Based on employment location quotients, the core industries for Barnstable County are Accommodations and Food Service; Retail; and Health Care and Support Services. The

emerging industries identified in the LQ analysis are Arts, Entertainment, and Recreation; Construction; and Utilities. ([Employment Diversity](#))

- Average earnings remain stagnant when adjusted for inflation, consistent with the rest of Massachusetts and the US. Seven percent of Barnstable County lives below the federal poverty level. ([Education and Workforce Development for Wage Growth, Wellbeing](#))
- The COVID-19 pandemic in 2020 has caused unprecedented economic distress in the region. Barnstable County faced a higher unemployment rate at 21.6% in April 2020, compared with the state (15.1%) and the US (14.7%). ([Employment Diversity](#))
- Housing affordability continues to be a key economic challenge on Cape Cod, exacerbated by the cost of land and its limited supply, low-wage employment opportunities, and “missing middle” housing types. ([Housing Diversity](#))
- Climate change, sea level rise, erosion, and other coastal hazards are economic as well as environmental threats to Barnstable County. Nineteen percent of the land area is in a FEMA Special Flood Hazard Area, with single family homes at risk of flooding worth more than \$16 billion ([Economic and Resilience Distress Factors and Challenges](#))
- Nearly all development on Cape Cod continues to utilize on-site septic systems that release nitrogen to groundwater, which results in degraded embayment water quality. Wastewater infrastructure is needed in identified Activity Centers in the region in order to encourage economic growth while protecting sensitive environmental resources. ([Environmental Quality](#))

CEDS Structure and Process

The CEDS is a tactical economic development plan consistent with the growth policy and goals of the Regional Policy Plan (RPP), which provides a vision of the future and a framework for collaborative action. The CEDS, like the RPP, recognizes the importance of Cape Cod’s interrelated natural, built, and community systems while speaking directly to the economic development needs of the region.

THE CEDS PLANNING PROCESS

Regional Planning Agencies (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 BCEDC serves as the CEDS Strategy Committee.

CAPE COD ECONOMIC DEVELOPMENT DISTRICT (EDD)

Cape Cod was designated an Economic Development District (EDD) by the EDA on December 19, 2013.¹ The district is comprised of the 15 towns that make up Barnstable County. In conferring this designation, the EDA has committed to providing financial assistance to economic development in distressed communities on Cape Cod. To be designated an EDD, the applicant must have an EDA-approved CEDS and at least one geographical area within the designated service boundaries that meets the EDA's regional distress criteria.²

EDA assistance was essential in obtaining the EDD designation as well as completing and implementing the CEDS. In addition to directly funding CEDS development and implementation, EDA funding leverages other regional funding opportunities which advance the Cape Cod Commission's economic and community development work. Continued EDA funding will be instrumental in reducing economic distress in this region, as we address our economic challenges including those related to the 2020 COVID-19 pandemic.

WHO CREATED THE CEDS?

Development of the CEDS was led by the Cape Cod Commission, the regional planning agency for Barnstable County, in partnership with the Barnstable County Economic Development Council (BCEDC), an advisory board to the Barnstable County Commissioners. Stakeholders from across economic sectors and representing different parts of the community, from education to social services and government, agreed on a vision, goals, and nine regional objectives and developed a comprehensive action plan around these priorities.

CEDS Vision & Goals

ECONOMIC VISION FOR CAPE COD

"Cultivating creativity, diversity, and innovation to build a strong and resilient economy"

¹ EDA Economic Development Districts, <https://www.eda.gov/edd/>

² EDA Economic Distress Criteria legislation: <https://www.law.cornell.edu/cfr/text/13/301.3>

Cape Cod enjoys a robust year-round economy with a workforce that lives, plays, and shops locally. Our local economy is supported by modern and resilient infrastructure; strategic development of employment and business opportunities; and resolute protection of the natural assets and historical character that define our region.

Community Systems

GOAL: REGIONAL COLLABORATION AND JOINT COMMITMENT

To provide a forum for local and regional organizations to identify and execute economic and environmental development policies and projects, and advance economic and environmental resiliency

GOAL: ECONOMY AND HOUSING

To promote a sustainable regional economy comprised of a broad range of businesses, diverse employment opportunities, and an adequate supply of ownership and rental housing that is safe, healthy, and attainable for people with a variety of needs and income levels

Built Systems

GOAL: BUILT RESOURCES

To protect and enhance the unique character of the region's built and natural environment, including traditional development patterns, scenic resources, and cultural, historic, and archaeological resources

GOAL: CAPITAL FACILITIES AND INFRASTRUCTURE

To advance reliable, resilient, and efficient infrastructure that is appropriately located, equitably distributed, and meets regional needs including energy independence, waste reduction, clean air and water, and multimodal transportation

Natural Systems

GOAL: COASTAL RESOURCES

To protect, preserve, or restore the quality and functions of ocean resources and to prevent or minimize loss of life, livelihood, and property or environmental damage resulting from climate change

GOAL: NATURAL RESOURCES

To preserve, protect, and restore the region's natural resources including drinking water, surface water, and wetlands; plant and animal habitats; and open space and recreational resources

CEDS Evaluation

HOW DO WE MEASURE PROGRESS?

The Commission regularly compares performance against goals, adapts to changing circumstances and opportunities, and drafts annual reports that outline any action plan changes.

Quantitative and qualitative measures are used to gauge progress towards the CEDS goals overall or towards the goals of specific projects. Evaluation of CEDS implementation happens at three levels:

- Evaluating the Region's Progress
- Evaluating the CEDS-Led Regional Collaboration
- Evaluating the CEDS Annual Implementation Plan

The first tier analyzes a comprehensive set of measures that benchmark regional progress against the past, the state, and the nation, based on the CEDS goals and objectives and EDA's measure of distress. The second tier focuses on how well CEDS partners have collaborated to grow local capacity and leverage outside resources to implement the CEDS action plan. The final tier reviews what was achieved over the past year on the annual workplan for the Cape Cod Commission under the CEDS and by partners on individual projects.

In FY21, Commission staff will review the 2019 list of metrics and measures to streamline the CEDS evaluation process, striving for relevancy to regional success and availability of data to ensure they can be evaluated in an objective, timely, and cost-effective way.

ECONOMIC AND RESILIENCE DISTRESS FACTORS AND CHALLENGES

In the 2019 CEDS, the region committed to advancing economic resilience, building capacity to withstand shocks and disruptions. The challenges to Cape Cod's sustainability and resiliency are related to its geographic location, development patterns, and demographic profile:

- Climate Change
- Water Quality
- Housing
- Seasonal Economy
- Demographic Diversity

- Limited Developable Area and Infrastructure
- Threats to Community Character

The action plan and year-one implementation plan outlined in the CEDS propose creative and collaborative ways to reduce the impact of these economic challenges to Barnstable County.

Climate change continues to threaten Cape Cod, as flooding and erosion will be exacerbated by sea level rise and changing storm frequency and intensity. These threats can cause loss of life, damage buildings and infrastructure, impair coastal environments, and otherwise impacts a community's economic, social, and environmental well-being. Even today, without the increased risk of climate change and sea level rise, flooding threatens \$16 billion worth of assessed building value in the FEMA Special Flood Hazard Area. ³

Additionally, since the approval of the CEDS, Cape Cod began experiencing the public health and economic effects of the COVID-19 pandemic. Although not an anticipated challenge, Commission staff is working with regional partners – local and regional policymakers, planners, town staff, local business owners, Cape Cod Healthcare, Chambers of Commerce, and more – to provide resources to those impacted by the pandemic. The Commission anticipates addressing pandemic-related challenges through a resilience and recovery planning effort in Fall 2020 and amending the CEDS to better address these types of challenges in the future.

EVALUATING THE REGION'S PROGRESS

Changes in the regional economy are measured in three ways, through Regional Balanced Economy Benchmarks, Regional Priority Objectives, and EDA Distress Criteria.

Regional Balanced Economy Benchmarks

Each Balanced Economy benchmark is made up of numerous individual measures that are tracked over time and compared to state and national trends whenever possible. These trends may be shaped by local action and planning, but in many cases may also require larger regional or structural changes to shift trends.

POPULATION DIVERSITY

Cape Cod experienced rapid population growth, beginning in the 1960s, alongside its increasing appeal as a tourist destination. By the 2000 Census, Cape Cod had grown over 400%, adding just over 150,000 year-round residents in five decades (from 70,300 to 222,230). In the past 15 years,

³ 2018 RPP Update. Cape Cod Commission. www.capecodcommission.org/rpp

however, the region has seen a slow but steady population decline, falling from 226,011 in 2003 to 213,690 in 2018 (Figure 1).⁴

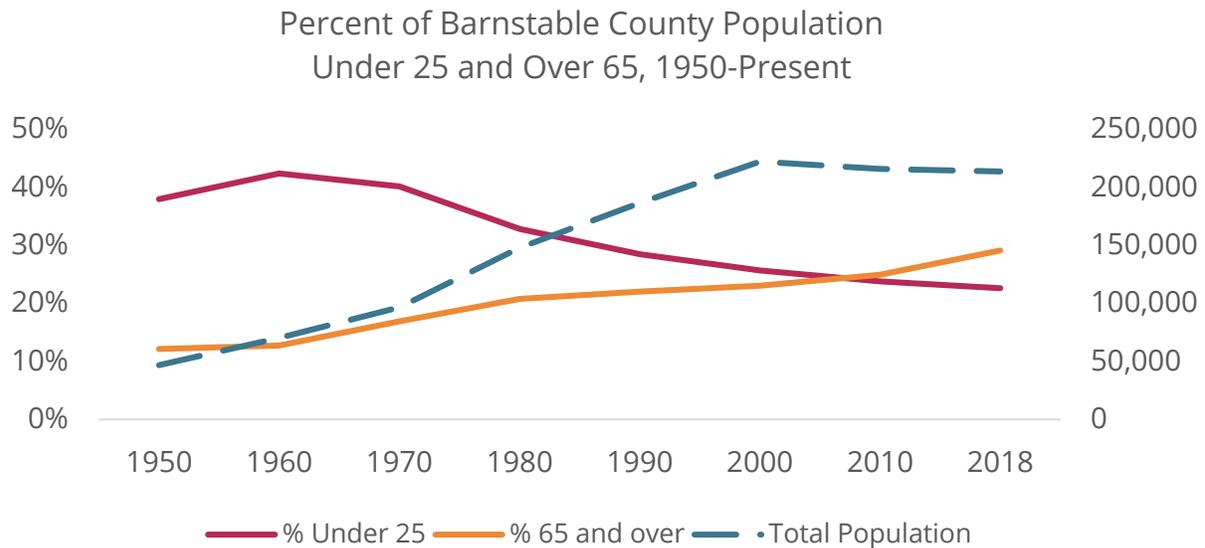


Figure 1. Percent of Barnstable County Population Under 25 and Over 65, 1950-Present. Source: US Census Bureau.

There are 151,461 residents under the age of 65, representing 70.8% of the regional population. There are 185,069 people in Barnstable County over the age of 16 (86.6%), and the labor force participation rate is 59.9%. The Median age in Barnstable County is 52.9, ranging from 48.4 in Bourne to 61.9 in Truro.⁵ For residents who moved to Barnstable County (from abroad, another state, or within the state and outside the county), 13,580 people (6.4%) were over 65 years old.⁶

Based on the Census Flows Mapper, Barnstable County saw 3,566 movers *from* a different state in 2017, while 4,484 moved *to* a different state; additionally, there were 4,165 movers *from* a different Massachusetts county, while 5,475 residents moved *to* a different county in the state. Another 1,099 residents moved abroad in 2017, leading to a total net loss of 3,327 residents.⁷

Barnstable County is predominantly white (91.9%), with 17,248 non-white residents representing 8.1% of the total. Black or African American residents make up 2.9% of the population, American Indian/Alaska Native residents are 0.5%, and Asian residents comprise 1.5% of the population.

⁴ US Census Bureau, American Community Survey Estimates.

⁵ 2018 ACS 5-Yr Estimates.

⁶ Note: We will continue to pursue alternative data sets on age of out-migrants.

⁷ Census Flows Mapper. <https://flowsmapper.geo.census.gov/map.html#>

The median household income (MHI) for Barnstable County is \$70,621, ranging from \$50,741 in Provincetown to \$95,600 in Sandwich. Low, middle, and high-income ranges were determined based on income summary statistics from the 2018 ACS. The low-income cohort ranges from \$0 to \$49,999; the middle-income cohort ranges from \$50,000 to \$124,999, and high-income is \$125,000 and above. Out of the 94,292 occupied households in Barnstable County, 33,378 are in the low-income cohort (35.3%); 39,365 are in the middle-income cohort (41.7%); and 21,549 are in the high-income cohort (22.9%). Compared with 2013, there were 95,398 occupied households in the county, with 39,362 are in the low-income cohort (41.5%); 40,019 are in the middle-income cohort (41.9%); and 15,747 are in the high-income cohort (16.5%).⁸

HOUSING DIVERSITY

The Cape Cod housing market does not meet the region's needs, and affordability challenges are exacerbated by the high price of land, lower than average wages reinforced by a seasonal economy, a lack of housing choice and supply, and an increasing demand for seasonal and retirement housing. The Great Recession and subsequent recovery by households in the Boston and New York metropolitan areas, resulted in a historically large number of new seasonal unit demand, including new additions and conversions from year-round units, a trend which continues today.⁹

Barnstable County has 163,181 housing units total. There are 94,292 occupied households in Barnstable County; of these, 74,991 (79.5%) are owner-occupied and 19,301 (20.5%) are renter-occupied.

There are 68,889 vacant housing units on Cape Cod, and 62,705 of those, or 38.4% of all housing units, are designated for seasonal, recreational, or occasional use. Town-level housing seasonality ranges from 17.3% in Sandwich to 79.1% in Truro. A recent Regional Housing Market Analysis for Barnstable County shows an anticipated 4% growth in the total housing stock, but the seasonal unit demand is expected to grow twice as fast as the demand for year-round units.¹⁰

Cape Cod's housing stock is dominated by single family homes—133,537 detached single-family units make up 82% of the total housing stock, compared to 52% for the state. There are 28,861 multi-family homes (one attached unit or more), or 17.6% of all housing units. Housing options between single-family homes and mid-rise apartments, the so-called "missing middle housing," would provide much needed housing units for the region's workforce while protecting and enhancing Cape Cod's environment and character.¹¹

⁸ 2013 and 2018 ACS 5-Yr Estimates. Table ID: B19001

⁹ 2017 Cape Cod Regional Housing Market Analysis. <https://capecodcommission.org/our-work/housing-market-analysis/>

¹⁰ 2017 Cape Cod Regional Housing Market Analysis. <https://capecodcommission.org/our-work/housing-market-analysis/>

¹¹ Community Resiliency by Design. <https://storymaps.arcgis.com/stories/75d9538dced244fca275db7dc4add9d4>

The median home price on Cape Cod is \$410,000, ranging from \$337,500 in Yarmouth to \$725,000 in Chatham.¹² These home prices are unattainable for many Barnstable County residents working in the region's top industries. In order to own a median priced home, for example, employees in the Accommodation and Food Services industry would need 3.5 earners in the household to make it affordable (spending a maximum of 30% of their total income on housing).¹³

SEASONALITY

Because of its reliance on summer tourism and second homeowners, Cape Cod has a highly seasonal economy. This impacts employment opportunities for year-round residents, as some business are only open for part of the year, and many of the jobs in the top employment industries for Barnstable County (accommodations, food, and retail) pay lower-than-average wages.

Based on the US Bureau of Labor Statistics' Local Area Unemployment Statistics, Barnstable County had an unemployment rate of 6.1% in January 2020 (with 6,648 unemployed) and 2.8% in July 2019 (with 3,609 unemployed).¹⁴ Compared to statewide unemployment rates of 3.4% in January and 3.1% in July, Barnstable County's employment is much more subject to seasonal fluctuations.

Seasonal jobs were estimated based on the 2018 annual Wage and Employment data (ES-202) shared by the MA Department of Unemployment Assistance. Across all high-level NAICS industries, there were 29,161 additional jobs in Barnstable County in July 2018 compared to January 2018, a 32% increase. Two industries—Educational Services and Health Care/Social Assistance—lost 1,226 employees from January to July.

The peak number of monthly seasonal visitors was about 6.1 million people, compared to Cape Cod's year-round population of 213,690.¹⁵

EMPLOYMENT DIVERSITY

The employed population in Barnstable County is 97,623 residents (a 4.3% increase since 2014).¹⁶ In 2018, the number of workers aged 16 to 64 who worked full-time, year-round was 61,119, representing 28.6% of the population (compared to 33.7% in Massachusetts and 32.3% in the US).¹⁷

¹² Cape Cod and Islands Association of Realtors Annual Report on the Cape Cod Housing Market, 2019.

¹³ How Many Earners, Pre-COVID Conditions. <https://datacapecod.com/housing/>

¹⁴ Note: County-level data is not available seasonally adjusted.

¹⁵ Note: Estimate based on rounded bridge crossing numbers for the Sagamore Bridge (2017) and the Bourne Bridge (2019), using the most recent full data sets available from MassDOT. Assumed Average Vehicle Occupancy was 1.48 based on CCC Estimate. Year-Round Population based on 2018 ACS 5-yr Estimate.

¹⁶ US BLS QCEW 2019 annual average (preliminary).

¹⁷ 2018 ACS 5-Yr Estimates. Table ID: S2303

Cape Cod is a second homeowner and tourism-driven economy. The top tourism-reliant industries are Arts, Entertainment, and Recreation and Accommodation and Food Services, employing 3,098 people (3.2% of all employment) and 16,376 people (16.7%) respectively.

The highest wage industries in Barnstable County are:¹⁸

- Utilities, with 443 employees, and average weekly wages of \$1,804
- Finance and Insurance, with 2,307 employees, and average weekly wages of \$1,864
- Professional and Technical Services, with 4,550 employees, and average weekly wages of \$1,419

Location quotients (LQs) are a quantitative way to determine the “industry specializations” of an area, compared with the rest of the United States. The three industries with the highest Annual Average Employment LQs in Barnstable County are:¹⁹

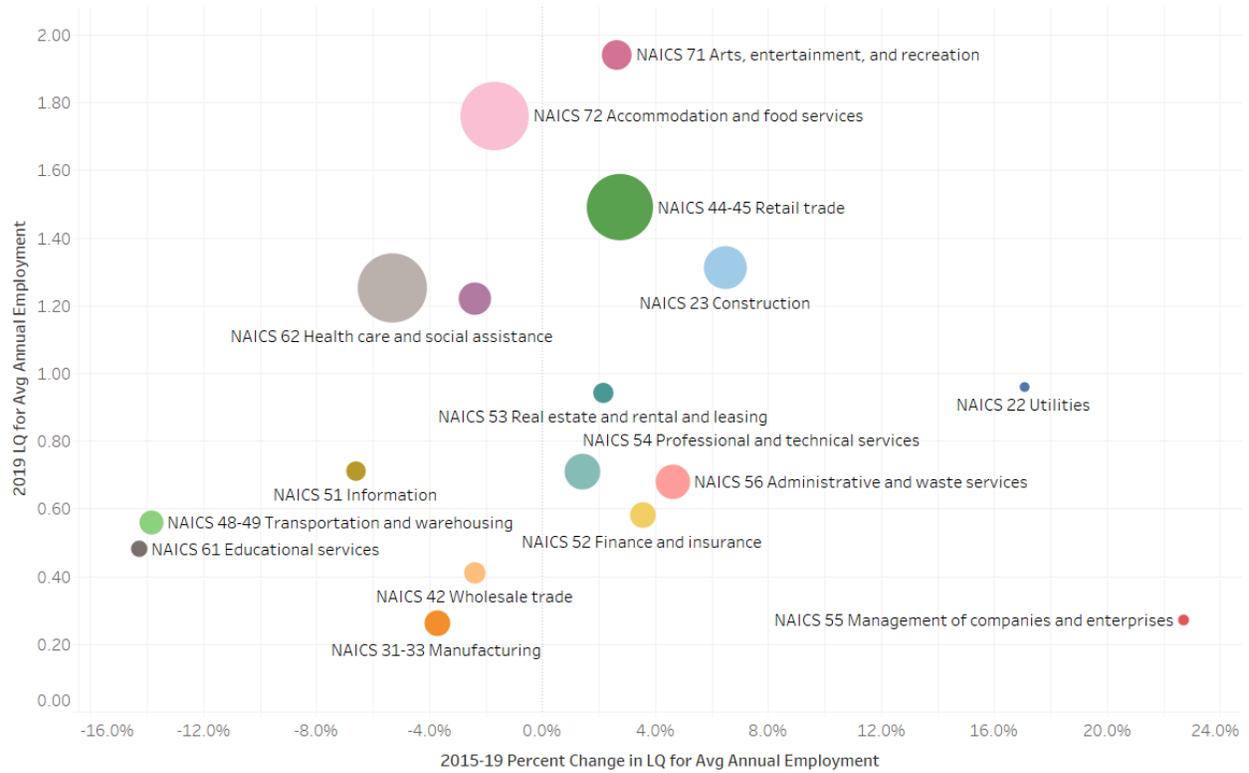
- Arts, Entertainment, and Recreation (LQ of 1.92)
- Accommodation and Food Services (LQ of 1.77)
- Retail Trade (LQ of 1.46)

Core and emerging private industries were identified by comparing the 2019 LQs by Industry, using Annual Average Employment, the five-year percent change in that LQ, and the percentage of overall county employment (Figure 2).

¹⁸ US BLS QCEW 2019 annual average (preliminary, weighted average of ownership types).

¹⁹ 2019 US BLS QCEW.

Location Quotients for Private Industry, Barnstable County (2019)



Sum of PERCENT CHANGE LQ for average annual employment vs. sum of 2019 LQ for average annual employment. Color shows details about NAICS Sector. Size shows sum of Annual avg employment. The marks are labeled by NAICS Sector. The view is filtered on sum of PERCENT CHANGE LQ for average annual employment, which keeps non-Null values only.

- NAICS Sector**
- NAICS 22 Utilities
 - NAICS 23 Construction
 - NAICS 31-33 Manufacturing
 - NAICS 42 Wholesale trade
 - NAICS 44-45 Retail trade
 - NAICS 48-49 Transportation and warehousing
 - NAICS 51 Information
 - NAICS 52 Finance and insurance
 - NAICS 53 Real estate and rental and leasing
 - NAICS 54 Professional and technical services
 - NAICS 55 Management of companies and enterprises
 - NAICS 56 Administrative and waste services
 - NAICS 61 Educational services
 - NAICS 62 Health care and social assistance
 - NAICS 71 Arts, entertainment, and recreation
 - NAICS 72 Accommodation and food services
 - NAICS 81 Other services, except public administration

Figure 2. Data Source: US BLS, Quarterly Census of Employment and Wages. Accessed 6/9/20.

The three “core” industries for Barnstable County have an LQ of 1.0 or higher and employ more than 10% of the total County workforce, and the three “emerging” Industries have shown growth over five years (2015-2019) in Barnstable County, and have a relatively high LQ compared to the rest of the US (Table 1).

	Location Quotient	Avg Monthly Employment	5-Yr Change in Employment	% of Total Employment	Total Establishments
	<i>Private</i>			<i>All Ownership Types</i>	
Core Industries					
Accommodation and Food Service	1.76	16,376	6.05%	16.81%	2.81
Retail Trade	1.49	15,354	-0.51%	15.76%	1411
Health Care and Social Assistance	1.25	17,110	4.48%	17.56%	1173
Emerging Industries					
Arts, Entertainment, and Recreation	1.94	3,739	19.76%	3.84%	281
Construction	1.31	6,748	22.18%	6.93%	1313
Utilities	0.96	428	6.47%	0.44%	22

Table 1. Barnstable County Core and Emerging Industries (2019). Source: US Bureau of Labor Statistics Quarterly Census of Employment and Wages. Monthly Employment and Wages by Industry: ES-202 data.

In 2019, the Public Policy Center at UMass Dartmouth published “Charting the Course: A Regional Assessment of the Marine Science and Technology Sector in Southeastern New England.” The report looks at a broader geography, including Barnstable County but extending through the South Coast to Narragansett Bay in Rhode Island. The high opportunity areas of growth for the Blue Economy in this region include aquaculture, offshore communications, offshore wind, and sustainable seafood. These opportunity areas have high regional growth prospects and higher regional strength and capacity.²⁰

The 2019 CEDS encourages the growth of employment in science, technology, engineering, and mathematics (STEM) sectors. The Standard Occupation Classification (SOC) Policy Committee recommended a standard classification for STEM (Life and Physical Science, Engineering, Mathematics, and Information Technology; Social Science) and STEM-related (Architecture; Healthcare) occupations.²¹ In 2018, employment in these occupations totaled 10,330 employees in the Cape and Islands Workforce Development Area. Median wages range from \$29,559 (Dietetic Technicians) to \$176,819 (Family Medicine Physicians).²²

For the civilian employed population over 16 in Barnstable County, the occupations with the highest median earnings in 2018 were Computer and Mathematical Occupations, Law Enforcement Workers

²⁰ Charting the Course, 2019. Public Policy Center at UMass Dartmouth. <http://publicpolicycenter.org/wp/wp-content/uploads/Charting-the-Course-PPC.pdf>

²¹ STEM Definition Options, August 2012. https://www.bls.gov/soc/Attachment_B_STEM.pdf

²² Occupational Employment and Wage Statistics, May 2019.

including Supervisors, Architecture and Engineering Occupations, Health Diagnosing and Treating Practitioners and other technical occupations, and Management Occupations (Table 2).²³

		Computer and Mathematical Occupations	Law Enforcement Workers Including Supervisors	Architecture and Engineering Occupations	Health Diagnosing and Treating Practitioners and other technical occupations	Management Occupations
Barnstable County	Median Earnings	\$80,435	\$78,406	\$74,601	\$71,452	\$70,791
	Total Jobs	1,608	1,310	1,307	5,505	11,567
	Percent of Total	1.53%	1.25%	1.24%	5.24%	11.01%
Massachusetts	Median Earnings	\$91,621	\$80,564	\$85,333	\$77,310	\$84,582
	Total Jobs	151,114	30,578	81,682	174,084	401,953
	Percent of Total	4.23%	0.86%	2.29%	4.88%	11.26%
United States	Median Earnings	\$78,761	\$58,687	\$79,027	\$68,686	\$70,230
	Total Jobs	4,633,860	1,478,454	2,822,111	6,135,435	15,263,898
	Percent of Total	3.03%	0.97%	1.85%	4.02%	9.99%

Table 2. Occupation Earnings and Percent of Total Employment. Source: 2018 ACS 5-yr Estimates.

American Community Survey collects information on self-employment; out of 105,075 civilian employees in Barnstable County, 18,108 (17.2%) were self-employed in 2018 (in either incorporated or unincorporated businesses).²⁴

Cape Cod Healthcare recently identified concerns about meeting the needs of the region’s aging population in their latest Community Health Needs Assessment Report. In a recent survey, ‘health care services focused on seniors’ and ‘support to older adults to maintain independent living’ were

²³ 2018 ACS 5-Yr Estimates. Table ID: S2401.

²⁴ 2018 ACS 5-Yr Estimates. Table ID: B24080.

two of the most frequently selected health and social service priorities by survey respondents.²⁵ As Cape Cod’s retired population continues to grow, there may be an increasing need for employment in the Health Care and Social Assistance industry. In 2019, there were 16,526 employees in the industry in Barnstable County (a five-year increase of 0.92%), with an annual average weekly wage of \$1,101.

However, unemployment due to COVID-19 has affected all industries and all occupations throughout the nation. The US is facing an unprecedented 14.7% unemployment rate in May 2020, with Barnstable County seeing a 21.6% unemployment rate and Massachusetts with 15.9% rate as of April 2020.²⁶ Figure 3 highlights the sharp drop in employment beginning in May 2020, with the gray bands representing past recessions. Additional information about COVID-19 impacts by industry, comparing county and state unemployment claims, are available at Data Cape Cod:

<https://datacapecod.com/unemployment/>.

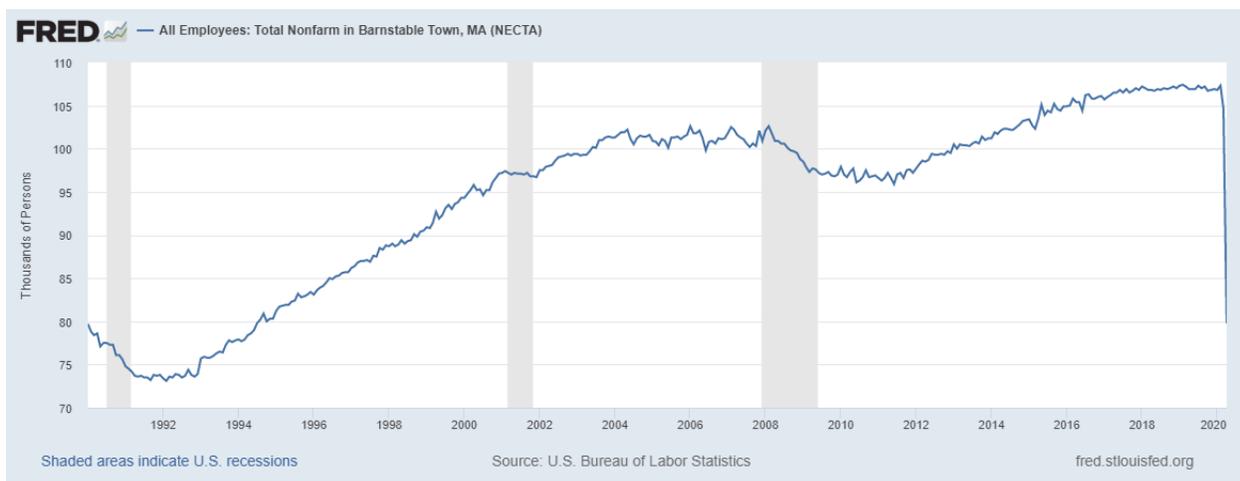


Figure 3. Number of Employees, Barnstable County. 1990-2020. US BLS.

WAGE DIVERSITY

The top three highest-wage industries in Barnstable County were:

- Utilities, with an annual average weekly wage of \$2,017
- Finance and Insurance, with an annual average weekly wage of \$1,864

²⁵ Cape Cod Healthcare. Community Health Needs Assessment Report and Implementation Plan 2020-2022. <https://www.capecodhealth.org/app/files/public/9327/community-health-needs-assessment-2020-2022.pdf>

²⁶ MA Dept. of Unemployment Assistance, Economic Research Department. Labor market Information. <https://lmi.dua.eol.mass.gov/LMI/LaborForceAndUnemployment#>. Rates not seasonally adjusted.

- Professional and Technical Services, with an annual average weekly wage of \$1,408

The Massachusetts minimum wage was \$12.75 per hour in 2019; for full-time employment of 40 hours a week, the annual wages are \$24,960. For the Barnstable County population over 16 with earnings (a total of 118,386), there are 7,086 who are making under \$25,000 a year (5.9% of the total).²⁷

In 2018, the median earnings for full-time, year-round workers with earnings is \$54,913, compared to \$61,235 in Massachusetts and \$47,527 in the United States.²⁸ The median income for all households on Cape Cod is \$70,621, compared to \$77,378 in Massachusetts and \$60,923 in the United States. The median household income on Cape Cod has increased 8.24% from 2013 (\$65,242 when adjusted for inflation).²⁹

Those who were self-employed in their own incorporated business on Cape Cod earned a median income of \$60,031; residents who were self-employed in their own non-incorporated business or as an unpaid family worker earned a median income of \$30,794.³⁰

BUSINESS DIVERSITY

In 2019, there were 9,628 establishments on Cape Cod for all industries and all ownership types (Private, Local/State/Federal Government), an increase of 5.7% since 2014 (9,108 establishments).³¹

The number and share of establishments in the three emerging industries [identified above](#) are Arts, Entertainment, and Recreation (281 or 2.9% of total); Construction (1,313 or 13.8% of total) and Utilities (22 or 0.2% of total). The number and share of establishments in the three core industries are Accommodation and Food Service (1,105 or 11.6% of total); Retail Trade (1,411 or 14.8% of total); and Health Care and Social Assistance (1,173 or 12.3% of total). Retail Trade showed a small loss in overall employment over five years (-0.71%), though Barnstable County showed an increase in the LQ for this industry to 1.46 in 2019. This is likely caused by greater losses in retail industry employment at the national level over the same time period. It remains an industry “specialization” on Cape Cod, with 15,306 employees in 2019 representing 15.7% of total employment.

There are 1,460 retail establishments based on the 2017 County Business Patterns (CBP) data from the Census, and 53 establishments (3.6%) have 50 or more employees. The majority are small establishments with less than five employees (768, or 52.6% of the total).

²⁷ 2018 ACS 5-Yr Estimate. Table ID: S2001.

²⁸ Note: Earnings – primarily wages and salary from a job - are just one kind of income. Other sources of income include Social Security payments, pensions, child support public assistance, annuities, money derived from rental properties, interest, and dividends. Source: <https://www.census.gov/newsroom/blogs/random-samplings/2010/09/income-vs-earnings.html>

²⁹ 2018 ACS 5-Yr Estimate. Table ID: S1901.

³⁰ 2018 ACS 5-Yr Estimate. Table ID: S2418. Civilian Employed Population, 16 Years and Older.

³¹ US BLS QCEW, 2019 (Preliminary) and 204.

Across all sectors, the 2017 CBP shows that 79.3% of all business establishments have less than ten employees, and 60.9% have less than five (5,295 out of a total of 8,681 businesses).³²

PRODUCTIVITY

The Gross Domestic Product (Real GDP) for Barnstable County in 2018 was \$12.46 billion, up from \$11.77 billion in 2013.³³

The total wages for Barnstable County, across all industries and business ownership types (Private, Local/State/Federal Government) in 2019, was \$4.88 billion, an increase from \$3.83 billion in 2013.³⁴

According to the US Bureau of Economic Analysis, the total personal income for Barnstable County was \$15.95 billion in 2018, an increase from \$12.67 billion in 2013.^{35,36} Of that 2018 total, \$8.2 billion (51.2%) are from residents' net earnings and \$2.9 billion (18.6%) are from personal current transfer receipts.³⁷ In Massachusetts, net earnings in 2018 were \$320.8 billion (64.8% of the total) and personal current transfer receipts were \$69.4 billion (14.0% of the total). The difference in ratio of earnings to total personal income reflects the high median age of Barnstable County residents – people move to Cape Cod once they retire.

VALUE ADDED

The 2018 Regional Policy Plan update outlines four core economic development principles, including “expanding opportunity and regional wealth by increasing exports, substituting imports locally, and fostering local ownership.” The Value Added metric looks at Barnstable County business receipts as a measure of regional success on this principle.

Based on the 2017 Economic Census, the total of sales, value of shipments, or revenue across all industries was \$16.34 billion. This reflects an increase of 21.6% compared to 2012 (\$13.44 billion). The number of firms with paid employees increased 1.4% to 7,390 over the same five-year timeframe.³⁸

³² 2017 County Business Patterns, Barnstable County.

³³ FRED. <https://fred.stlouisfed.org/series/REALGDPALL25001>

³⁴ US BLS QCEW. Series ID: ENU2500130010.

³⁵ Note: Personal Income is the income that is received by all persons from all sources, including wages and salaries, supplements to wages and salaries (e.g. bonuses), proprietors' income with inventory valuation and capital consumption adjustments, rental income of persons with capital consumption adjustment, personal dividend income, personal interest income, and personal current transfer receipts, less contributions for government social insurance. The personal income of an area is the income that is received by, or on behalf of, all the individuals who live in the area; therefore, the estimates of personal income are presented by the place of residence of the income recipients.

³⁶ US Bureau of Economic Analysis, CAINC1 Personal Income Summary, 2018.

³⁷ US Bureau of Economic Analysis, CAINC5N Personal Income by Major Component and Earnings by NAICS Industry. 2018.

³⁸ Note: This data is collected every five years; starting in 2002, data for Wholesale Trade and Education Services for Barnstable County have not been disclosed to avoid exposing confidential information for individual businesses.

EXPORTS AND NEW MONEY

In FY19, annual meals tax receipts for Barnstable County totaled \$7,665,118, a 9.2% increase from FY18 and a 19.9% increase over FY16 (Table 3). The annual rooms tax receipts for Barnstable County totaled \$14,482,022 for FY19, a 0.4% increase over FY18 and a 9.0% increase over FY15.^{39,40}

Town	FY19 Meals Tax Distribution	FY19 Rooms Tax Distribution
Barnstable	\$1,620,726	\$3,052,566
Bourne	\$466,680	\$83,750
Brewster	\$177,201	\$1,189,857
Chatham	\$473,859	\$1,470,225
Dennis	\$602,031	\$522,888
Eastham	\$100,515	\$293,672
Falmouth	\$1,000,033	\$1,219,139
Harwich	\$439,960	\$684,792
Mashpee	\$411,938	\$107,262
Orleans	\$332,713	\$236,351
Provincetown	\$653,954	\$2,209,507
Sandwich	\$432,004	\$252,477
Truro	\$61,054	\$370,479
Wellfleet	\$251,289	\$116,428
Yarmouth	\$641,161	\$2,672,629
Barnstable County	\$7,665,118	\$14,482,022

Table 3. FY19 Rooms and Meals Tax Distribution by Town, Barnstable County.
Source: MA Dept of Revenue, Division of Local Services.

Based on the 2018 ACS 5-Year Estimates, there are 12,925 Barnstable County residents who work outside the county (12.6% of the total).⁴¹ The inflow of earnings to Barnstable County in 2018 was \$1,943,111,000.⁴²

³⁹ Municipal Databank, MA Dept of Revenue Division of Local Services. <https://www.mass.gov/municipal-databank-data-analytics-including-cherry-sheets>

⁴⁰ Note: FY2015 is earliest year available through databank for meals tax.

⁴¹ 2018 ACS 5-Yr Estimate. Table ID: B08130

⁴² US BEA. CAINC91 Gross Flow of Earnings.

WELLBEING

Year-round employment opportunities with good wages can be difficult to find on Cape Cod. The tourism industry in particular has many low-wage, seasonal jobs that do not provide a living wage, or the income needed to meet the cost of living in a particular region. About 7% of the Barnstable County population lives below the federal poverty level (14,799 residents), compared to 10.8% of Massachusetts and 14.1% of the US.⁴³ (The 2020 federal poverty level is \$26,200 for a family of four; the living wage for Barnstable County for a family of four with two working adults is \$18.89 an hour, or \$39,290.⁴⁴)

High demand for housing by both year-round residents and second-home owners combined with low average wages on Cape Cod results in a housing market that is unaffordable for many year-round residents. About 33,275 (35.3% of 94,350) Barnstable County households experience housing cost stress, meaning they spend more than HUD-recommended 30% of their income on housing costs (Table 4).⁴⁵

Barnstable County Housing Cost Burden Overview	Owner	Renter	Total
Cost Burden <=30%	50,150	10,200	60,350
Cost Burden >30% to <=50%	13,505	4,555	18,060
Cost Burden >50%	10,615	4,600	15,215
Cost Burden not available	410	310	720
Total	74,680	19,670	94,350

Table 4. Housing Cost Burden for Barnstable County residents by Ownership. Source: US Department of Housing and Urban Development (HUD) Comprehensive Housing Affordability Strategy (CHAS). 2016.

In every town on Cape Cod, the median household income is less than what is needed to avoid housing cost stress, resulting in affordability gaps ranging from \$5,765 to \$83,321 (Table 5).

Town	Median Sales Price (2019)	Annual Income for Median Sales Price to be Affordable (30% of Income)	Median Household Income (2018)	Difference Between MHI and Annual Income Needed for Affordability
Barnstable County	\$410,000	\$96,085	\$70,621	-\$25,482
Barnstable	\$390,000	\$89,189	\$68,919	-\$20,270
Bourne	\$387,500	\$93,614	\$74,668	-\$18,946

⁴³ FRED. Not seasonally adjusted. <https://fred.stlouisfed.org/series/S1701ACS025001#0>

⁴⁴ MIT Living Wage Calculator. <https://livingwage.mit.edu/>

⁴⁵ HUD CHAS Data for Barnstable County. 2016. <https://www.huduser.gov/portal/datasets/cp.html>

Town	Median Sales Price (2019)	Annual Income for Median Sales Price to be Affordable (30% of Income)	Median Household Income (2018)	Difference Between MHI and Annual Income Needed for Affordability
Brewster	\$415,000	\$97,328	\$73,765	-\$23,563
Chatham	\$725,000	\$160,845	\$77,878	-\$82,967
Dennis	\$365,500	\$82,644	\$59,805	-\$22,839
Eastham	\$459,000	\$107,804	\$68,161	-\$39,643
Falmouth	\$456,900	\$107,119	\$73,201	-\$33,918
Harwich	\$432,500	\$101,577	\$75,352	-\$26,225
Mashpee	\$413,500	\$98,018	\$71,810	-\$26,208
Orleans	\$585,000	\$135,152	\$71,418	-\$63,734
Provincetown	\$605,000	\$134,062	\$50,741	-\$83,321
Sandwich	\$399,900	\$101,365	\$95,600	-\$5,765
Truro	\$660,000	\$148,973	\$65,446	-\$83,527
Wellfleet	\$529,000	\$122,521	\$69,267	-\$53,254
Yarmouth	\$337,500	\$80,705	\$63,061	-\$17,644

Table 5. Affordability Gap between Median Sales Price and Median Household Income, Barnstable County, 2018-2019. Source: Cape Cod and Islands Association of Realtors; 2018 ACS 5-Yr Estimate; NerdWallet Mortgage Cost Calculator; 2017 Housing Market Study

According to the National Alliance to End Homelessness, “as the gap between increasing housing costs and stagnant incomes widens, the end result is that more people become homeless.”⁴⁶ The lack of housing affordability is a national trend, but Cape Cod’s seasonal and second homeowner economy drives housing costs and incomes even further apart.

Every year, the Cape and Islands Regional Network on Homelessness conducts the annual Point in Time Count that counts the number of people experiencing homelessness in emergency shelters, transitional housing, on the street, in cars, in abandoned buildings, and in other places not meant for human habitation. The information is reported regionally, including Cape Cod, Martha’s Vineyard, and Nantucket, and indicates that 336 people (adults and children, sheltered and unsheltered) were considered homeless during the January 2020 count.⁴⁷

⁴⁶ National Alliance to End Homelessness. <https://endhomelessness.org/homelessness-in-america/what-causes-homelessness/housing/>

⁴⁷ 2020 Annual Point in Time Count. Cape and Islands Regional Network on Homelessness. <http://www.bchumanservices.net/library/2020/05/2020-PIT-Results-2019-2020.pdf>

SMART GROWTH PATTERNS

The 2018 RPP’s growth policy states that “Growth should be focused in centers of activity and areas supported by adequate infrastructure and guided away from areas that must be protected for ecological, historical or other reasons. Development should be responsive to context allowing for the restoration, preservation and protection of the Cape’s unique resources while promoting economic and community resilience.” Focusing growth in existing centers of activity can help create vibrant, more compact and walkable communities that could offer a greater variety of housing options affordable to households from diverse socioeconomic backgrounds. Table 6 below describes existing conditions within community activity centers. The amount of development in community activity centers may take time to change significantly. The updated STATSCapeCod will seek to include data that helps track information on development within community activity centers relative to development outside of community activity centers.

	Estimated Number of Residential Housing Units within Community Activity Center	Residential Density within Community Activity Center (Estimated Residential Units per Acres)	Residential Density in Town (Residential Units per Acre)	Estimated Square Footage of Commercial Buildings	% of Estimated Commercial Square Footage in Town within Community Activity Center
Barnstable Village	171	0.50	0.63	112,351	1.12%
Buzzards Bay	422	1.85	0.39	233,507	7.11%
Chatham	884	1.35	0.62	522,518	37.87%
Dennis	514	1.14	1.14	154,876	5.16%
Dennis Port	857	2.75	1.14	349,098	11.63%
Falmouth	1,801	1.89	0.75	1,658,502	36.27%
Harwich Port	945	2.87	0.70	215,007	11.49%
Hyannis	1,974	2.17	0.63	2,433,349	24.29%
Mashpee Commons	165	0.46	0.62	533,643	26.85%
Orleans	542	1.31	0.54	755,827	39.25%
Osterville	648	1.66	0.63	261,123	2.61%
Provincetown	3,358	5.72	0.66	958,817	79.03%
Sandwich	396	0.98	0.34	160,106	9.95%
South Yarmouth	443	1.75	0.99	271,777	6.48%

	Estimated Number of Residential Housing Units within Community Activity Center	Residential Density within Community Activity Center (Estimated Residential Units per Acres)	Residential Density in Town (Residential Units per Acre)	Estimated Square Footage of Commercial Buildings	% of Estimated Commercial Square Footage in Town within Community Activity Center
Wellfleet	494	1.08	0.30	152,118	25.19%
West Dennis	364	1.75	1.14	176,004	5.87%
Woods Hole	314	1.20	0.75	68,017	1.49%

Table 6. Community Activity Center Characteristics. Source: Cape Cod Commission analysis. Estimated number of residential units based on 2019 Cape Cod Commission Parcel data set, land use code, and square footage of structure. Commercial square footage estimated using 2019 Cape Cod Commission Parcel data set.

QUALITY OF LIFE

Out of the 102,740 workers over 16 in Barnstable County, 36.2% commute to work in less than 15 minutes. The mean travel time to work is 23.3 minutes, compared to 29.7 for the state. On Cape Cod, 6.8% of residents work from home, compared to 5.0% statewide.⁴⁸

Residents and visitors leverage Cape Cod’s Regional Transit Authority for commuting, doctor’s visits, and other transportation needs. Demand for fixed routes peaked in July, while the on-demand service was fairly steady throughout the year (Figure 4). The total number of fixed-route trips in 2019 was 701,015, while there were 311,940 on-demand trips taken, for a grand total of 1,012,955.⁴⁹

⁴⁸ 2018 ACS 5-&r Estimate. Table ID: S0801.

⁴⁹ Cape Cod RTA, 2019.

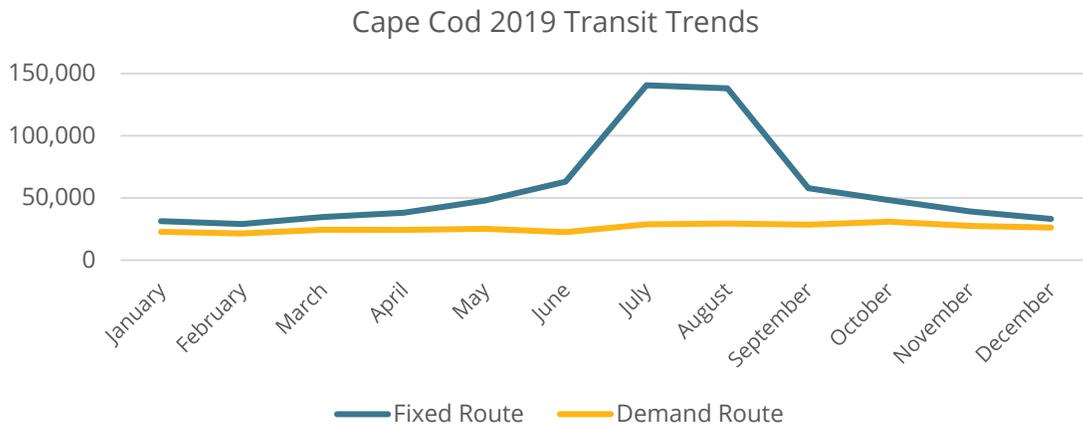


Figure 4. Cape Cod 2019 Transit Trends. Source: Cape Cod Regional Transit Authority, 2019.

Cape Cod’s open space (91,000 acres or about 40% of the region’s assessed land) is critical to the health of the region’s natural systems, economy, and population (Figure 5). In addition to providing habitat, drinking water supply protection, and a natural carbon sink, the beaches, farms, woodlands, and marshes in the region provide recreational outdoor activities that attract visitors and residents to Cape Cod.⁵⁰

The vision articulated for Community Activity Centers in the 2018 RPP is “is to accommodate mixed-use and multifamily residential

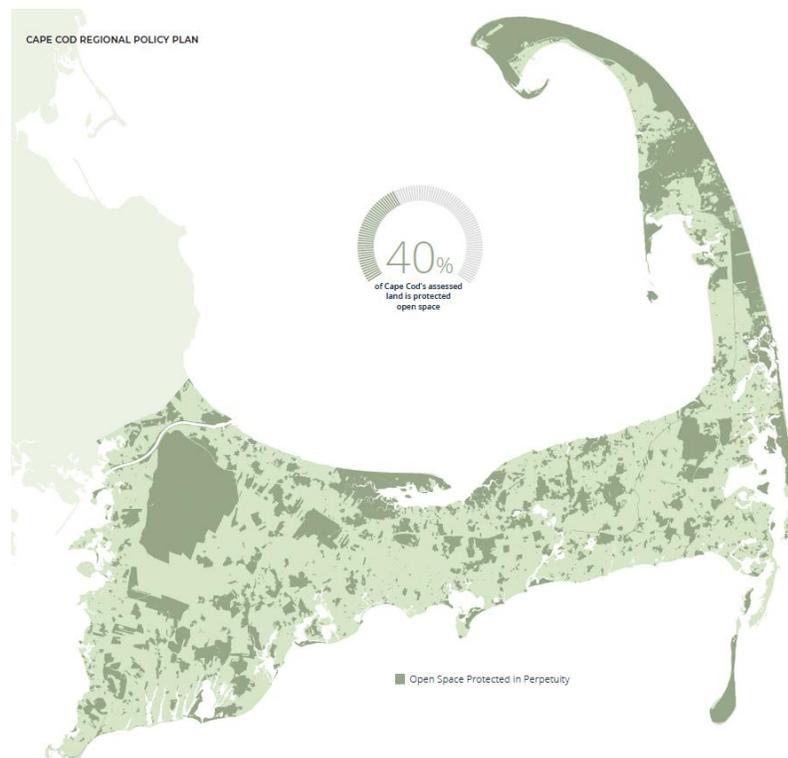


Figure 5. Open Space Protected in Perpetuity on Cape Cod. 2018 RPP Update, Cape Cod Commission.

⁵⁰ 2018 RPP Update, Cape Cod Commission. www.capecodcommission.org/rpp

development in a walkable, vibrant area, preserve historic buildings, and to provide diverse services, shopping, recreation, civic spaces, housing, and job opportunities at a scale of growth and development desired by the community, with adequate infrastructure and pedestrian amenities to support development.” A mix of uses will help create and sustain these areas as vibrant places where people can live, work, and play. Currently, much of the land area in Community Activity Centers is devoted to residential uses, when looking at the mix of land uses by area (Figure 6).

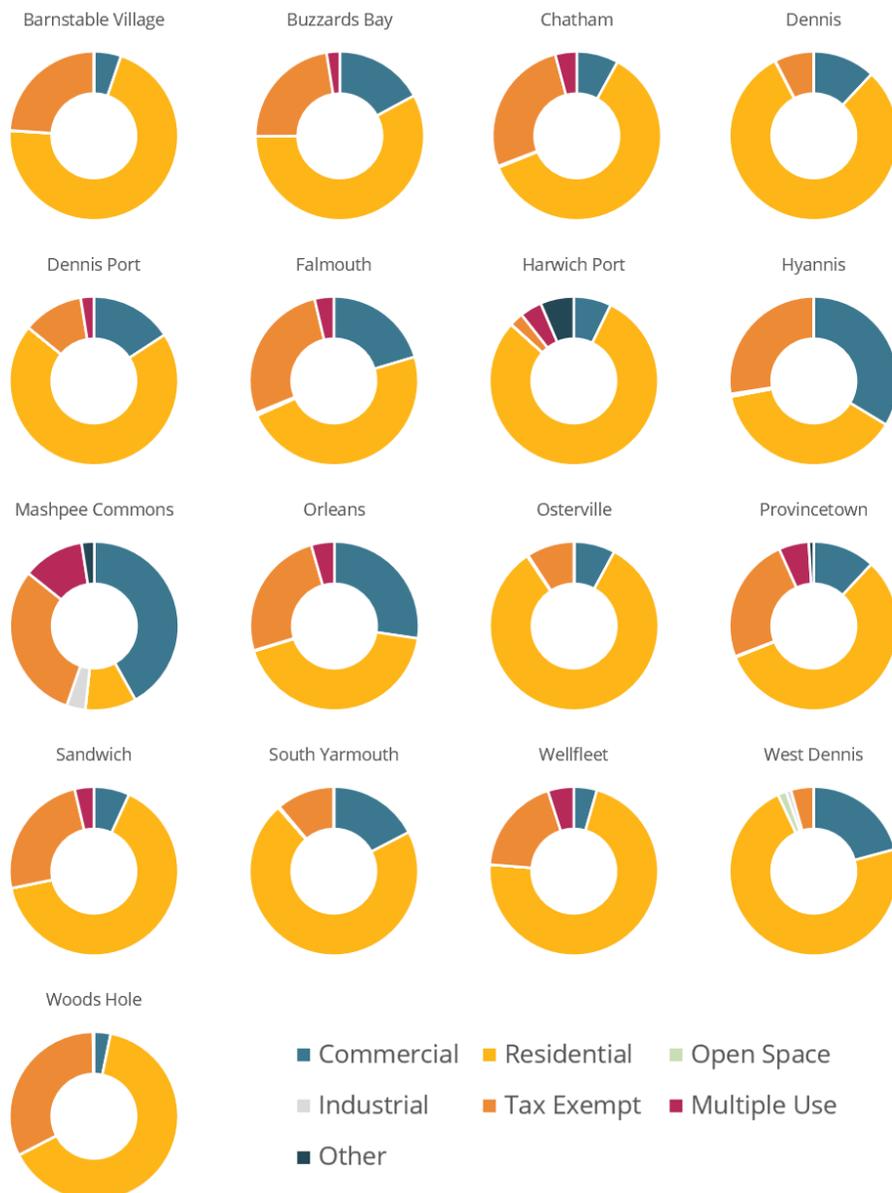


Figure 6. Land use composition of Community Activity Centers. Source: Cape Cod Commission analysis using 2019 Cape Cod Commission Parcel data set.

ENVIRONMENTAL QUALITY

Natural systems are an integral part of life on Cape Cod, providing drinking water and supporting the habitats and landscapes that draw people to the region, guiding development patterns, and driving the region's economy.

Using planimetric data, Commission staff calculated the acres of landscaped area, impervious surface, and acres of tree canopy on Cape Cod by town (Table 7). Landscaped areas included managed vegetation such as lawns and shrubs; impervious surface includes paved areas, sidewalks, and building/structure footprints; tree canopy includes tree canopy, grassland, and unmanaged vegetation. The most recent data set available was collected in 2014, and a new data set will be available in FY21 to show regional trends in changing environmental quality.

	Acres of Landscaped Area	Acres of Impervious Surface	Acres of Tree Canopy
Barnstable	5,870	3,124,157,986	268,040,369
Bourne	2,775	810,267,942	112,955,723
Brewster	1,796	362,856,789	65,306,336
Chatham	1,842	263,817,041	32,861,403
Dennis	2,750	560,766,688	53,118,535
Eastham	1,311	162,238,156	27,119,447
Falmouth	4,994	1,810,042,928	174,084,120
Harwich	2,218	456,299,649	62,672,892
Mashpee	2,241	429,525,498	37,931,130
Orleans	1,707	162,068,828	27,876,338
Provincetown	190	47,904,076	10,325,444
Sandwich	3,954	829,460,034	94,166,774
Truro	526	128,569,982	31,585,889
Wellfleet	507	762,310,245	28,443,614
Yarmouth	2,998	762,310,245	73,867,661

Table 7. Showing acres of landscaped area, impervious surface, and tree canopy in Barnstable County by town. Source: Cape Cod Commission planimetrics data set, 2014

The Cape Cod Commission continues to work on regional water quality issues following the adoption of the 208 Plan in 2015 and 208 Implementation Report in 2017. Since the 208 Plan was completed, over 990 million gallons per year of wastewater have been collected on Cape Cod, with 41 non-traditional pilot projects underway. Along with the Implementation Report, the Commission

released reports that characterize each of the 53 embayment watersheds on Cape Cod. The Watershed Reports outline two approaches for addressing the region’s nutrient problem, identify a water threat level by watershed, and tracks data on sources of and total attenuated watershed nitrogen load, wastewater flows, attenuated nitrogen load, and much more. The reports are available on the Commission’s website: <https://www.capecodcommission.org/our-work/208-plan-implementation/>

To measure regional drinking water quality on Cape Cod, the US EPA requires community water systems to provide annual Consumer Confidence Reports (CCRs).⁵¹ These reports provide Americans information about their local drinking water quality.

The Association to Preserve Cape Cod published State of the Waters in 2019, leveraging existing data sets to grade coastal waters, freshwater ponds and lakes, and public water supplies for drinking water.⁵² For the 2019 report, APCC leveraged each town’s CCRs to grade water quality and compliance with existing drinking water regulations, and found that drinking water quality is excellent due to efforts made to protect land and water sources. The State of the Waters report also found that Cape Cod’s saltwater embayments and freshwater ponds are suffering from the negative effects of too many nutrients, and regionally water quality is in decline due to pollution from septic systems, stormwater, and fertilizers. Figure 7 is a screenshot of the interactive tool on their website that links to water body grades and relevant reports and data.

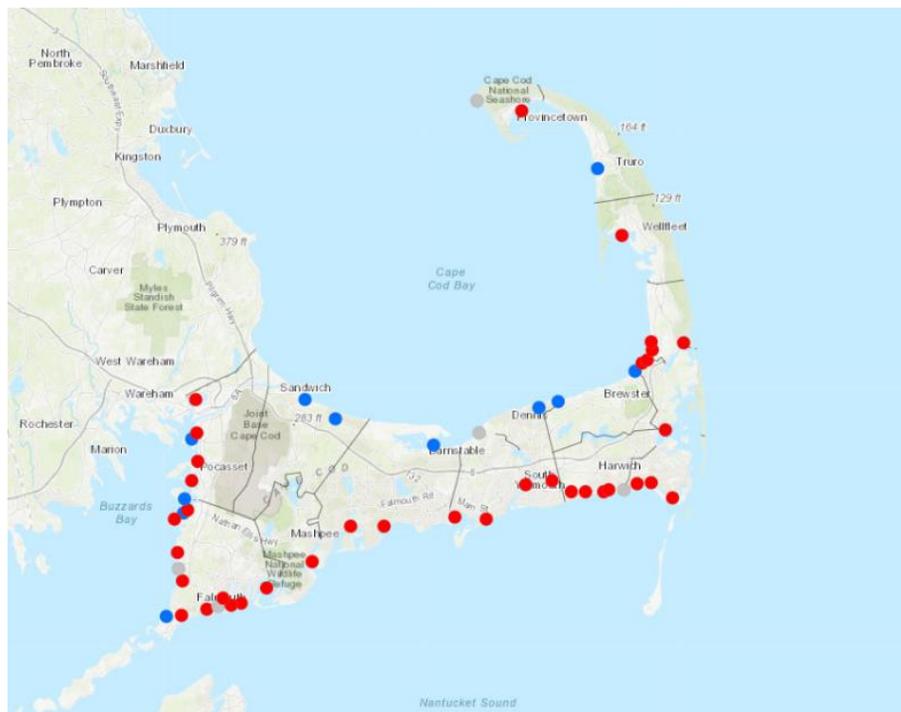


Figure 7. State of the Waters Report Results for Barnstable County. Association to Preserve Cape Cod. 2019. <https://capecodwaters.org/>

⁵¹ US EPA. Consumer Confidence Reports. https://ofmpub.epa.gov/apex/safewater/f?p=ccr_wyl:102

⁵² Association to Preserve Cape Cod. State of the Waters, 2019. <https://capecodwaters.org/>

In an analysis of tree coverage for Barnstable Area Regional Trends, regional LIDAR data showed 2,300 acres of forest cover were lost on Cape Cod from 2001-2011, with 84% of that loss related to residential development. These losses range from large open-space clearing to smaller-scale tree loss on residential lots (Figure 8).

The Commission works to protect the significant historical assets throughout the region, both through planning efforts and through the agency’s regulatory program. Cape Cod’s historic resources are tangible connections to the region’s agricultural heritage, maritime history, artist colonies, and unique past, and play a key role in attracting and retaining residents and visitors. Many of our historic structures are at risk, however, as 43% of inventoried structures over 100 years old are not protected.⁵³

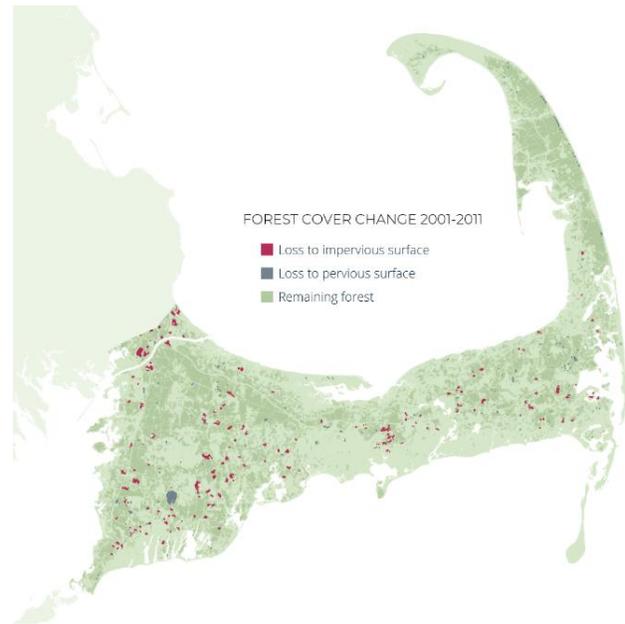


Figure 8. Forest Cover Change on Cape Cod, 2001-2011.
Source: Cape Cod Commission analysis.

- Total inventoried buildings/structures: 11,709
- Number of inventoried structures in Local Historic Districts: 4,606
- Number of inventoried structures in National Register Districts (not in LHDs): 1,469
- Number of inventoried structures with Preservation Restrictions (not on National Register or within a Local Historic District): 4
- Number of inventoried structures with no protections: 5,630
- Number of inventoried structures with no protections with construction dates pre-1800: 313
- Number of inventoried structures with no protections with construction dates 1800-1899: 1,991
- Number of inventoried structures with no protections with construction dates 1900-1949: 2,096

⁵³ 2018 RPP Update and Massachusetts Historical Commission data.

There are approximately 14,700 parcels in Barnstable County that were built before 1950, or 11.3% of the total parcels (Figure 9).⁵⁴

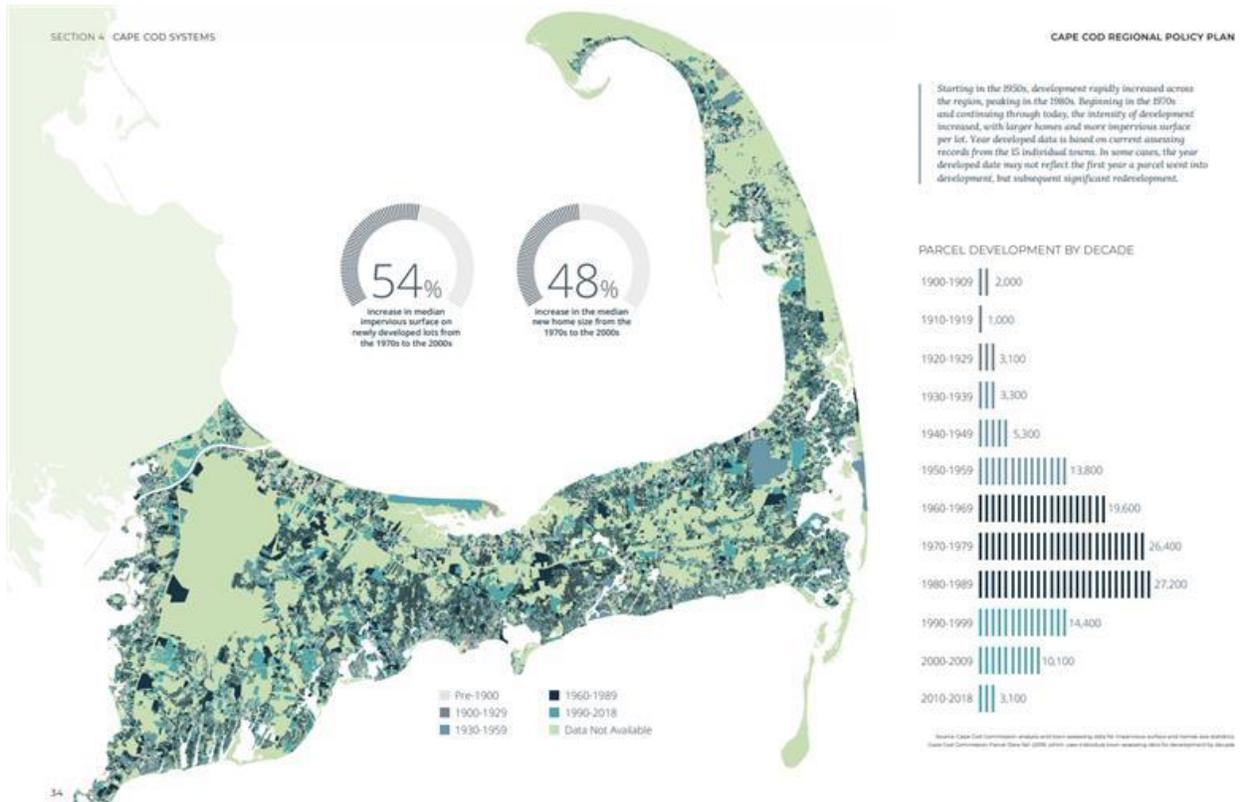


Figure 9. Historic Parcel Development on Cape Cod, pre-1900 to 2018. 2018 RPP Update, Cape Cod Commission.

Regional Priority Objectives

HOUSING DIVERSITY AND AFFORDABILITY

Housing affordability was identified as one of the top challenges in Barnstable County, as the housing market currently doesn't meet the region's needs. Lower than average wages, higher than average building and land costs, a lack of choice, limited supply, and the ever-present demand for seasonal and retiree housing makes housing for the current and future year-round population a high-priority challenge.⁵⁵ There is an affordability gap between the median home price and median household income in every town on Cape Cod (Figure 10).

⁵⁴ Town Assessors' Data. In some cases, the year developed date may not reflect the first year a parcel went into development, but subsequent significant redevelopment

⁵⁵ 2018 RPP Update, Cape Cod Commission. www.capecodcommission.org/rpp

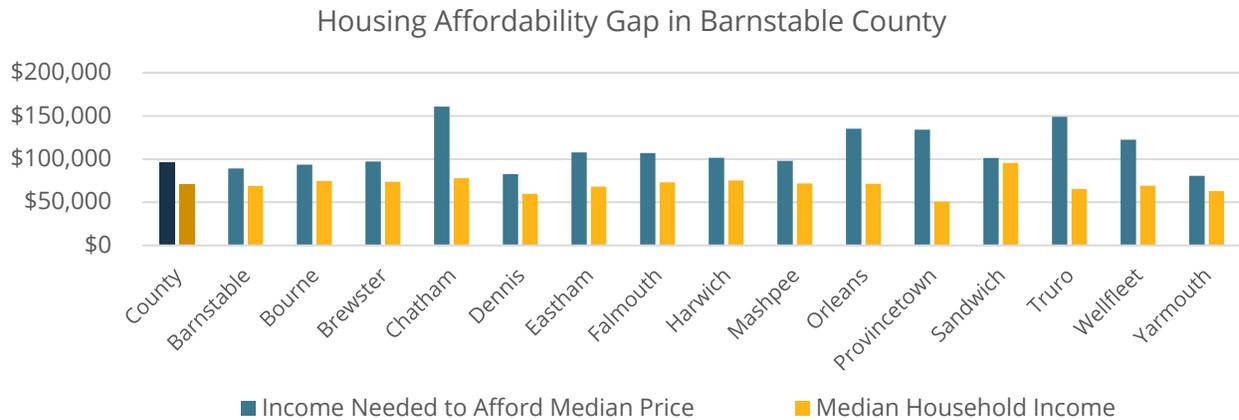


Figure 10. Affordability Gap between Income Needed to Afford a Median Priced Home and Median Household Income. Source: 2018 ACS 5-Yr Estimates; Cape Cod and Islands Association of Realtors.

The Massachusetts Subsidized Housing Inventory (SHI) is used to measure a community's stock of low- or moderate-income housing for the purposes of M.G.L. Chapter 40B (the Comprehensive Permit Law). Chapter 40B creates an affordable housing subsidy by granting developers a density bonus through the waiver of local zoning and other regulations—provided a certain amount of developed units are affordable—unless and until a town reaches a goal of 10% affordable units in their town. Orleans and Provincetown are over 9% affordable. On average, only 5.35% of the Cape's housing inventory is affordable (Table 8).

Town	2017 SHI Units	% of Total
Barnstable	1462	7.1
Bourne	660	7.7
Brewster	225	5.3
Chatham	174	5
Dennis	324	4.2
Eastham	54	2.1
Falmouth	959	6.4
Harwich	335	5.5
Mashpee	337	5.2
Orleans	304	9.2
Provincetown	208	9.8
Sandwich	307	3.8
Truro	25	2.3
Wellfleet	30	1.9
Yarmouth	527	4.4

Table 8. Barnstable County Subsidized Housing Inventory, 2017. Source: MA DHCD

While those earning below the median household income throughout the region struggle to afford housing, even those earning the median household income frequently cannot afford current market prices for housing ownership. In some instances, such as in Provincetown, those earning up to 200% of median household income cannot afford to purchase a home at the town's median sale price of \$605,000. There is also a significant lack of affordable rental housing in the region. This is partly due to the seasonal nature of the region's housing stock and the propensity

of second homeowners to rent their homes on a short-term basis in the summer and shoulder season months.

Similarly, as the population ages, many homeowners who would typically sell their homes and “downsize” to a smaller home, cannot find smaller, affordable housing options. This results in fewer starter homes available on the market for young families. The region needs not only subsidized affordable housing, but also more diverse housing options that are attainable for a wide variety of residents. Commission staff participate in Barnstable County HOME Consortium meetings and other housing forums, support local planning efforts to promote accessory dwelling units through a model bylaw, and undertake other means to promote diverse, affordable housing in the region, including through the Cape Cod RPP which promotes the development of diverse housing stock to support the Cape’s community and economy.

The 2019 CEDS encourages increased diversity of ownership types (more rentals and year-round housing). Rental housing is even more limited on Cape Cod given that many property owners can make more money renting their property for six weeks in the summer than renting it year-round, or they choose not to rent out their seasonal homes at all. Table 9 describes the tenure breakdown for housing units in the county by town.

Location	Total Housing Units	Owner Occupied	Percent Owner Occupied	Renter Occupied	Percent Renter Occupied
Barnstable	19,009	14,209	74.75%	4,800	25.25%
Bourne	8,492	6,247	73.56%	2,245	26.44%
Brewster	4,282	3,749	87.55%	533	12.45%
Chatham	4,634	2,317	50.00%	2,317	50.00%
Dennis	6,835	5,051	73.90%	1,784	26.10%
Eastham	4,116	2,058	50.00%	2,058	50.00%
Falmouth	13,541	10,387	76.71%	3,154	23.29%
Harwich	5,498	4,694	85.38%	804	14.62%
Mashpee	6,240	5,447	87.29%	793	12.71%
Orleans	2,830	2,261	79.89%	569	20.11%
Provincetown	1,760	1,347	76.53%	413	23.47%
Sandwich	7,824	6,879	87.92%	945	12.08%
Truro	641	551	85.96%	90	14.04%
Wellfleet	1,584	1,381	87.18%	203	12.82%
Yarmouth	10,528	8,413	79.91%	2,115	20.09%
Barnstable County	94,292	74,991	79.53%	19,301	20.47%

Table 9. Housing Units by Tenure. Source: 2018 ACS 5-Yr Estimates

INFRASTRUCTURE IN ACTIVITY CENTERS

One of the four EDA Investment Priorities is for Critical Infrastructure, encouraging projects that “establish the fundamental building blocks of a prosperous and innovation-centric economy and a secure platform for American business, including physical (e.g., broadband, energy, roads, water, sewer) and other economic infrastructure. Beginning with the 2018 RPP Update, the Commission has begun leveraging a context-sensitive review process and developed Placetypes to ensure that new development, including critical infrastructure, is harmonious with and enhances the unique character of the region and protection of its natural and cultural resources.

The growth policy of the 2018 RPP Update states:

“Growth should be focused in centers of activity and areas supported by adequate infrastructure and guided away from areas that must be protected for ecological, historical, or other reasons. Development should be responsive to context, allowing for the restoration, preservation, and protection of the Cape’s unique resources while promoting economic and community resilience.”



Figure 12. Community Activity Centers on Cape Cod. Source: Cape Cod Commission.

Wastewater is the primary source of nitrogen for the Cape’s coastal embayments, with septic systems contributing 94% of wastewater nitrogen. Centralized wastewater collection, treatment, and disposal systems can achieve high levels of nitrogen removal but require significant capital investment. The 2018 RPP update encourages towns to consider existing needs first in the

In alignment with the RPP, this CEDS objective encourages development in those activity centers, including effective wastewater treatment systems, transit, electric vehicle networks, renewable energy, and broadband (Figure 11). Expanding infrastructure in activity centers will encourage targeted, context-sensitive development that balances economic resiliency and environmental protection.

Water quality is a significant regional challenge for Cape Cod.

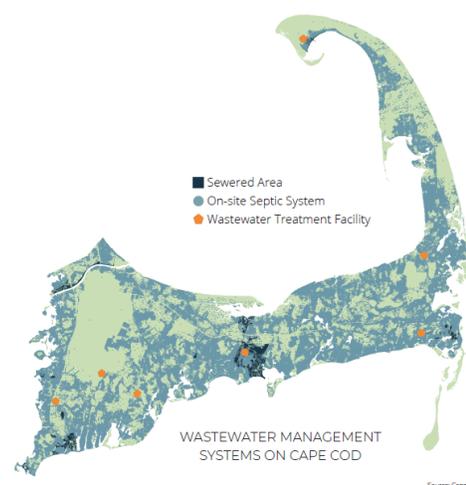


Figure 11. Wastewater Management Systems on Cape Cod. Source: 2018 RPP Update.

capital planning process – infrastructure should be built to serve existing needs and mitigate impacts of current development (as well as re-development and new development) within identified activity centers.

Using WatershedMVP, a wastewater planning tool developed by the Commission, staff identified the number and share of parcels that are sewerred in Community Activity Centers (Table 10).⁵⁶

Community Activity Center	Total number of wMVP centroids	Number of Sewered centroids	Share of Total Parcels
Woods Hole	149	94	63.09%
Falmouth	1385	368	26.57%
Mashpee Commons	99	12	12.12%
Osterville	311	0	0.00%
South Yarmouth	631	0	0.00%
Dennis Port	276	0	0.00%
Harwich Port	472	0	0.00%
Hyannis	1857	1117	60.15%
Barnstable Village	115	93	80.87%
Chatham	798	330	41.35%
Dennis	116	0	0.00%
Buzzards Bay	300	215	71.67%
Sandwich	346	0	0.00%
Orleans	347	0	0.00%
Wellfleet	277	0	0.00%
Provincetown	1698	726	42.76%

Table 10. Sewered parcel centroids in Community Activity Centers, 2020. Source: Cape Cod Commission.

Massachusetts is a national renewable energy leader, from the MA Renewable Energy Portfolio Standard requiring a certain percentage of the state’s electricity come from renewable energy, to the Act Relative to Energy Diversity in 2016, further defining its commitment to renewable energy and climate change mitigation.

Massachusetts is reducing greenhouse gas emissions through electric vehicle (EV) development, including new infrastructure and electric vehicle incentives to increase their use in the state. Commission staff conducted an electric vehicle charging station analysis in FY20, identifying 46 charging stations within 17 Community Activity Centers (Table 11).

⁵⁶ WatershedMVP. <https://capecodcommission.org/our-work/watershedmvp/>

Activity Center	Number of Charging Stations
Barnstable Village	1
Buzzards Bay	0
Chatham	0
Dennis	0
Dennis Port	0
Falmouth	2
Harwich Port	0
Hyannis	12
Mashpee Commons	12
Orleans	0
Osterville	0
Provincetown	11
Sandwich	2
South Yarmouth	0
Wellfleet	1
West Dennis	0
Woods Hole	5
Total	46

Table 11. Electric Vehicle Charging Stations in Community Activity Centers. Source: Cape Cod Commission, 2020.

Solar energy is another opportunity to reduce the greenhouse gas emissions that contribute to climate change, while also employing people in a STEM occupation.

The Massachusetts Clean Energy Center (MassCEC) provides information on where solar projects are installed down to the zip code level. The estimated annual production (kWhr) for the solar PV systems fully registered in the Production Tracking System in 2018 was 10,182,000 kWhr for Barnstable County (Figure 13).⁵⁷

LAST-MILE BROADBAND – FINANCING STRATEGY

Education, government, energy, healthcare, and other service and innovation sectors of the economy rely on effective and reliable access to broadband and telecommunications infrastructure.

Under previous CEDS, one of the first major successes was the building of the OpenCape middle-mile fiber-optic broadband network with federal, state, and regional funding, completed in 2013.⁵⁸ OpenCape Corporation is a non-profit technology company that owns and operates a state-of-the-

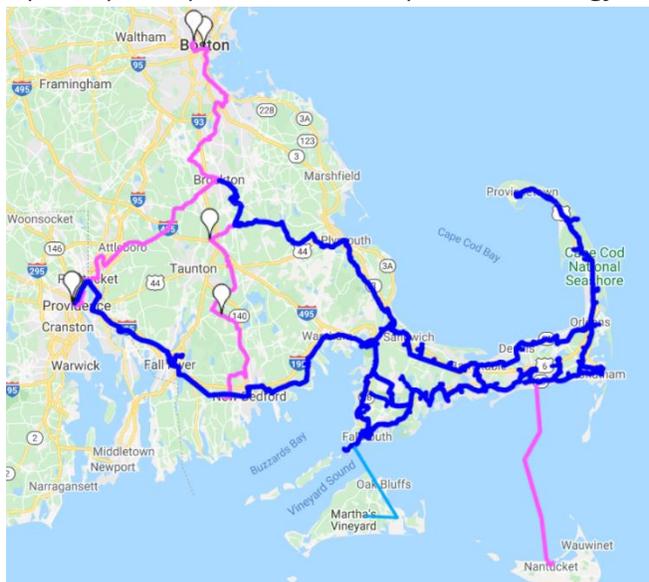
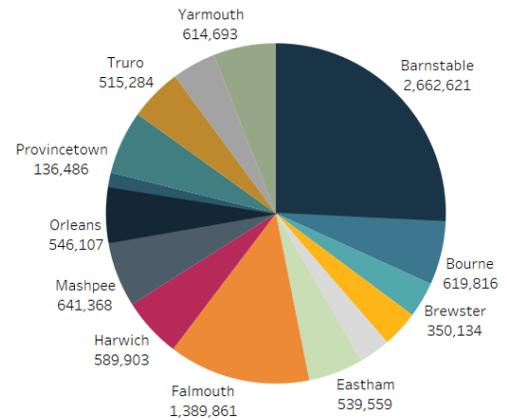


Figure 14. OpenCape Network Map. Accessed June 2020

Figure 13. Estimated Annual Production (kWhr) for Solar Projects in Barnstable County by town. Source:



art fiber optic network built to serve local governments, businesses, and residents of Southeastern MA, Cape Cod, and the Islands. In the 2019 CEDS, through the Regional Infrastructure Planning Initiative, OpenCape and its partners are encouraged to determine the optimal management structure and deployment plans for last-mile buildout of the network.

CEDS stakeholders recommended linking OpenCape with other high-speed internet middle-mile options with homes and businesses. The OpenCape network connections, shown in Figure 14, are mapped here: <https://opencape.org/network-map>

⁵⁷ MassSolarCEC. <https://www.masscec.com/data-and-reports>

⁵⁸ OpenCape. <https://opencape.org/>

ZONING AND REGULATORY REFORM FOR SMART GROWTH/ACTIVITY CENTERS

Commission staff collaborated with towns to provide recommendations for how they may change regulations to promote more diverse housing that aligns with community input garnered through stakeholder workshops. This included coordinating two workshops on form-based code (FBC), which communities may explore to support development of more diverse housing. Additionally, the Commission supported the Town of Falmouth in developing a Request for Proposals for a consultant to pursue FBC and the Town has since contracted with a consultant to help them develop the new zoning. The Town of Barnstable is pursuing new zoning for downtown Hyannis that incorporates form-based code elements, building off of the Community Resiliency by Design project completed there. Commission staff is currently working with the Town of Chatham to look at potential new zoning for a part of town that would also incorporate form-based code principles.

EXPANSION OF THE BLUE ECONOMY

Cape Cod is uniquely positioned to leverage industries that rely on ocean and coastal resources – the Blue Economy – in growing regional employment opportunities.

In 2017, Cape Cod’s Blue Economy Foundation created an Implementation Report to propose an action plan to foster growth in the region’s water-based economy.⁵⁹ The Foundation used North American Industry Classification System (NAICS) codes to determine which industries are “dark blue” – those that directly depend on our water resources – and “medium blue” – those that rely upon or are located in the region because of the water resources, but are not directly dependent on them.

Using the Foundation’s classifications and the 2018 Employment and Wages (ES-202) data, there are 692 dark blue establishments in Barnstable County, and 3,164 medium blue establishments. The average monthly employment for the dark blue establishments is 6,484, compared to 37,590 for medium blue establishments. The average weekly wages for the two are very similar: \$1,084 for dark blue employees and \$1,096 for medium blue employees.

As part of its collaboration with the Southcoast Development Partnership, the Cape Cod Commission developed an [interactive online map](#) of marine science and technology employers and clusters (Figure 15). This regional effort, funded by the US EDA, is growing a marine science and technology corridor that spans from Cape Cod down through Narragansett Bay, and brings together leaders in government, industries, and academia.⁶⁰

⁵⁹ Cape Cod Blue Economy Foundation Implementation Report. 2017. <https://www.bluecapcod.org/wp-content/uploads/2019/07/Cape-Cod-Blue-Economy-Project-Implementation-Plan-012219.pdf>

⁶⁰ OCEAN Alliance. <https://www.oceancorridor.org/about-the-alliance/>

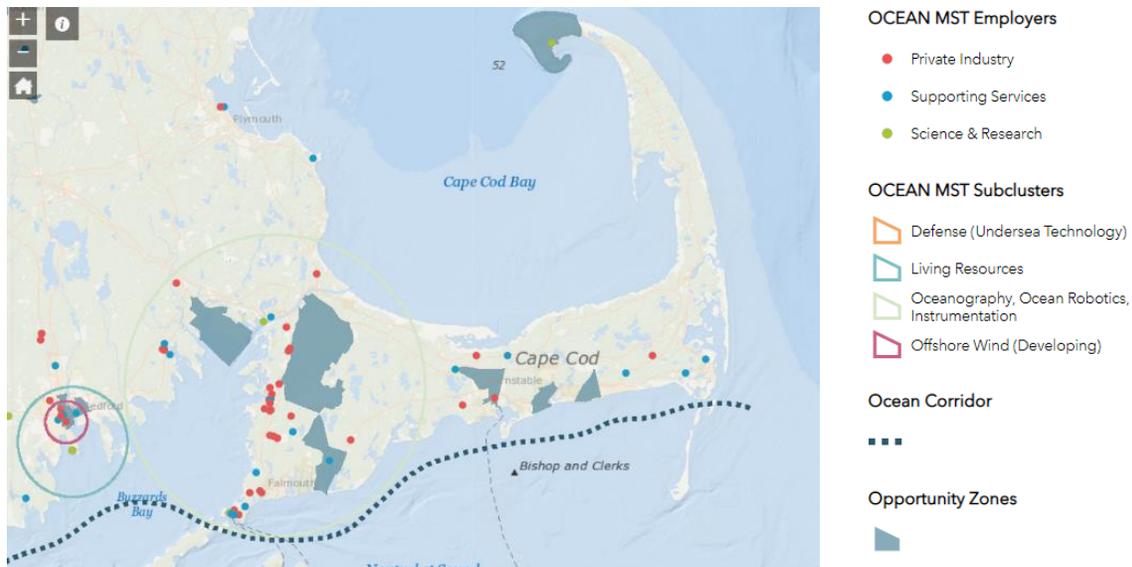


Figure 15. OCEAN Corridor Asset Map, highlighting Barnstable County

EDUCATION AND WORKFORCE DEVELOPMENT FOR WAGE GROWTH

Median earnings of Barnstable County residents, including full-time and part-time employees, show a slight decline over the past decade when adjusted for inflation (\$35,749 in 2018) (Figure 16). In Massachusetts, when adjusted for inflation, median earnings were \$41,115 in 2010, compared with \$41,476 in 2018; in the United States over the same time period, median earnings in 2010 were \$34,202 compared with \$33,439 in 2018.⁶¹ While employment growth has been steady, the average wages paid by Cape employers, when adjusted for inflation, have been largely stagnant and consistently below state and national averages since 1990.⁶²

The CEDS strategies outlined in the five-year update aim to continue to encourage the growth of high-wage industries and occupations on Cape Cod through focusing educational and workforce training programs on our core and emerging industries. These training programs will support job growth, wage equity, and economic resilience through diversification.

⁶¹ US Census. 2010-2018 ACS 5-Yr Estimate. Table ID: S2001

⁶² 2018 RPP Update.

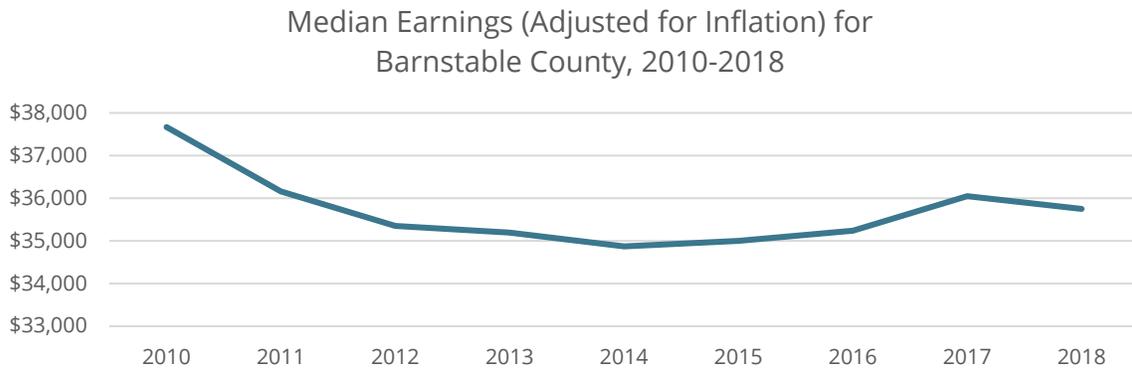


Figure 16. Median Earnings for Barnstable County residents, adjusted for inflation.
Source: 2010-2018 ACS 5-Yr Estimates.

BUSINESS DEVELOPMENT FOR WAGE AND JOB GROWTH

The region should continue to cultivate industries that directly address our [economic challenges](#), reducing the cost of doing business to support an employment base of entrepreneurs and locally-owned businesses.

The number of establishments on Cape Cod increased 1.5% from 2018 to 2019, slightly below the state-wide increase in establishments from 2018 to 2019 of 1.9%.⁶³ The overall employment for Barnstable County has increased 2.85% in the last five years across all privately-owned industries, from an annual average employment of 80,376 in 2015 to 82,669 in 2019.⁶⁴

In our emerging industries, increases in annual average employment ranged from 11.12% to 19.15%, and total annual wages increased from 19.38% to 34.81% (Table 12).

		Utilities (NAICS 22)	Construction (NAICS 23)	Arts, Entertainment, and Recreation (NAICS 71)
Annual Establishments	2015	14	1,138	244
	2019	8	1,319	260
	% Change	28.57%	15.91%	6.56%
Annual Avg Employment	2015	308	5,395	2,788
	2019	346	6,428	3,098
	% Change	12.34%	19.15%	11.12%
Total Annual Wages	2015	\$30,434,377	\$304,094,711	\$85,143,789
	2019	\$36,333,044	\$409,938,339	\$104,657,695
	% Change	19.38%	34.81%	22.92%

⁶³ US BLS. Quarterly Census of Employment and Wages. All Ownership Types, Annual Averages 2018-19.

⁶⁴ US BLS. Quarterly Census of Employment and Wages. Private Ownership. Annual Averages 2015-19.

		Utilities (NAICS 22)	Construction (NAICS 23)	Arts, Entertainment, and Recreation (NAICS 71)
Annual Average Weekly Wages	2015	\$1,902	\$1,084	\$587
	2019	\$2,017	\$1,227	\$650
	% Change	6.05%	13.19%	10.73%
Annual Wages per Employees	2015	\$98,920	\$56,371	\$30,539
	2019	\$104,882	\$63,779	\$33,782
	% Change	6.03%	13.14%	10.62%

Table 12. Employment and Wages in Emerging Industries, Barnstable County, 2015-19.

EXPANDED FINANCING TOOLS FOR INFRASTRUCTURE

In FY20 Commission transportation staff supported two studies conducted by the US Army Corps of Engineers and the Massachusetts Department of Transportation (MassDOT) on the Sagamore and Bourne Bridges by sharing Commission regional planning work, contributing data on population and visitation to the Army Corps’ initial studies, and serving as technical advisors. The Commission also works closely with MassDOT, which will be leading efforts to connect the new bridges to existing roadways. Supporting improved infrastructure addresses the weaknesses of vital regional infrastructure and will increase Cape Cod’s long-term resiliency. The next phase of the project will evaluate potential funding strategies for the two bridges.

The Commission provides administrative and technical support to the Cape Cod and Islands Water Protection Fund (CCIWPF), a dedicated fund within the state’s Clean Water Act, established in 2018 to solely benefit communities in Barnstable, Dukes, and Nantucket counties. A 2.75% excise tax is levied on traditional lodging and short-term rentals. Between July 2019 and March 2020, this fund generated more than \$8 million to help Cape Cod towns pay for wastewater mitigation.

REGIONALIZATION FOR GREATER EFFICIENCY IN GOVERNMENT

The Cape Cod Commission is the regional planning agency for Barnstable County and fosters collaboration between municipalities, local businesses, non-profits, conservation organizations, and other stakeholder organizations. Under this CEDS objective, the Commission and its partners identify and pursue opportunities for inter-municipal collaborations and regionalization to reduce costs for both government and business. Collaboration will also facilitate the region’s ability to address key economic challenges.

Commission staff participate in Massachusetts Association of Regional Planning Agencies (MARPA) meetings and have strengthened formal and informal partnerships with other RPAs. The Cape Cod Metropolitan Planning Organization (Cape Cod MPO) has coordinated with and established Memorandums of Understanding with neighboring MPOs as well (SRPEDD and OCPC), and Commission staff continued to participate in the Cape Cod Joint Transportation Committee (CCJTC) in FY20.

The Commission continues to partner with Cape Cod communities to maintain a cloud-based platform to increase government accountability and improve access to important public information. The OpenGov platform has been made available through the Commission's Strategic Information Office, and is live in four town: Falmouth, Provincetown, Sandwich, and Chatham.

Additionally, the Commission has facilitated towns' use of OpenCounter, a web-based zoning tool designed to make local regulations accessible to the public. OpenCounter reveals parcel-level zoning details, including existing uses, overlay, and planned development districts. Barnstable, Mashpee, and Yarmouth have portals up and running; Sandwich's is under development.

The Commission launched the Cape Cod Climate Initiative during this fiscal year, a community-based effort to inform and address the region's contribution to and threats from climate change. The Commission has held a series of facilitated subregional community meetings, as well as topic-specific focus groups, to solicit input regarding planning priorities, concerns, and barriers to moving climate adaptation and mitigation forward in the region. These discussions will help to inform a strategic framework and a broad collaborative process to address the region's contributions to and threats from climate change. The community meetings took place in the latter half of October 2019 in Chatham, Wellfleet, West Yarmouth, and Mashpee. The Commission also held four facilitated focus groups in January to further inform the strategic framework with stakeholders with expertise and experience in education, energy, local government, and environmental protection and advocacy.⁶⁵

The Commission also staffs and administers the Cape Cod Water Protection Collaborative, Barnstable County Coastal Resources Committee, the BCEDC (which serves as the CEDS Strategy Committee), and participates as an Ex-Officio member of the Barnstable County HOME Consortium (supporting affordable housing for low-income households).⁶⁶

A collaboration of 13 organizations, including the Cape Cod Commission, received a \$1.75 million grant from the US EPA's Southeast New England Program for Coastal Watershed Restoration (SNEP) to create the Southeast New England Network. Announced in October 2019, this network brings together regional experts in stormwater management, finance, water quality and habitat restoration, green infrastructure, low-impact development, and environmental restoration to offer a full complement of technical and financial services to municipalities, tribes, and organizations in Southern New England.

In April 2020, the Cape Cod Commission received a \$1 million EDA grant to fund the Cape Cod Resiliency Initiative, a multi-pronged planning initiative to address impacts and improve resilience to

⁶⁵ Cape Cod Climate Initiative. <https://capecodcommission.org/our-work/climate-change/>

⁶⁶ HOME Investment Partnership Program. <https://www.bchumanservices.net/initiatives/home-investment-partnership-program/>

coastal hazards such as flooding. A component of that work is the collection and integration of the most up-to-date planning data.

Aerial data acquisition is the combined process of collecting aerial photography and planimetrics: the physical assets and attributes interpreted from those images, including sidewalks, trees, public works infrastructure, and more. In 2012, the fifteen towns of Cape Cod successfully pursued a joint procurement of planimetric data, as it was more efficient financially and administratively than working independently. The Commission is working to update this regional dataset now. Planimetrics features are used by the towns and the Cape Cod Commission in a wide variety of initiatives, some of which are highlighted here on the Commission’s website (<https://capecodcommission.org/our-work/topic/gis-geodesign/>).

During the COVID-19 pandemic, the Commission has participated in the Cape Cod Re-Opening Task Force, developing data dashboards on economic development, public health, traffic, housing, and meals/rooms taxes to help policymakers make informed decisions about the region’s economic recovery. The Commission also partnered with the Chamber of Commerce to issue a Business Impact Survey to the region to better understand the current and anticipated impacts of the pandemic on the local business community.

EDA Distress Criteria

The two criteria that EDA uses to determine distress within census tracts are unemployment rate and per capita income. A census tract is considered distressed if it has:

- An unemployment rate that, averaged over the most recent 24-month period for which data are available, is at least 1% greater than the national unemployment rate for the same period
- A per capita income that, for the most recent period for which data is available, is 80% or less of the national average per capita income for the same time period

While Barnstable County has higher than average income, the unemployment rate in the region exceeds national averages, due in part to the seasonality of the economy (Table 12). Going forward, we anticipate severe impacts to both the unemployment rate and per capita income due to the COVID-19 pandemic.

	Barnstable County	US	Threshold Calculations
24-Month Average Unemployment Rate <i>US BLS; period ending April 2020</i>	4.56	3.66	0.9
2018 Per Capita Money Income <i>ACS 5-Yr Estimate</i>	42578	32621	130.62%

	Barnstable County	US	Threshold Calculations
2018 Per Capita Personal Income <i>US BEA</i>	74756	54446	137.30%

Table 13. StatsAmerica County-Based Distress Tool. Accessed June 2020.

There are 14 census tracts in Barnstable County that EDA considers distressed (Figure 17). These census tracts meet one or both criteria – a higher unemployment rate than the national average, or a lower per capita (money) income (PCMI) (Table 14). Those with a higher unemployment rate have a threshold calculation over 1; those with a lower PCMI have a threshold calculation below 100. Nearly 47,300 residents live in distressed Census tracts, or 22.1% of the county’s population.

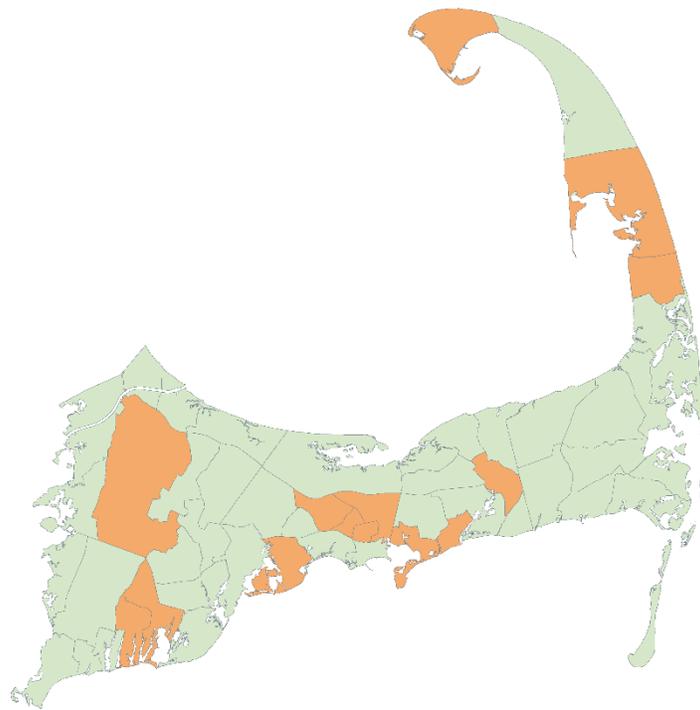


Figure 17. EDA Distressed Census Tracts in Barnstable County, June 2020. Source: StatsAmerica Distress Tool.

Census Tract	Town	2018 Unemployment Rate	Threshold Calc	2018 PCMI	Threshold Calc	2018 Population
101.00	Provincetown	6.9	1	\$47,429	145.4	2,960
102.06	Wellfleet	6	0.1	\$38,179	117.0	3,481
103.06	Eastham	6.1	0.2	\$37,142	113.9	2,462
115.00	Dennis	7.4	1.5	\$31,313	96.0	3,790
120.02	Yarmouth	7.8	1.9	\$32,446	99.5	2,816
121.02	Yarmouth	5.1	-0.8	\$35,209	107.9	3,050
126.01	Barnstable	5.7	-0.2	\$29,226	89.6	3,107
126.02	Barnstable	5.7	-0.2	\$21,493	65.9	5,204
128.00	Barnstable	4.5	-1.4	\$44,233	135.6	3,826
130.02	Barnstable	6.2	0.3	\$66,281	203.2	2,884
141.00	Joint Base Cape Cod	2.6	-3.3	\$20,951	64.2	909
145.00	Falmouth	8.7	2.8	\$30,442	93.3	5,613
146.00	Falmouth	6.8	0.9	\$39,020	119.6	4,237
153.00	Barnstable	7.4	1.5	\$28,859	102.8	2,919
	<i>Median</i>	6.2	<i>Median</i>	\$33,828	<i>Total</i>	47,258

Table 14. Barnstable County Distressed Census Tracts. StatsAmerica Distress Tool, 2018 ACS 5-Yr Estimates.

Previously, a census tract in Mashpee met the distress criteria, but it no longer meets that criteria given the decrease in the unemployment rate (9.1 in 2016 compared to 4.6 in 2018).

Census Tract	Town	2018 Unemployment Rate	Threshold Calc	2018 PCMI	Threshold Calc	2018 Population
150.02	Mashpee	4.6	-1.3	\$33,521	102.8	4,190

EVALUATING THE CEDS-LED REGIONAL COLLABORATION

The regional collaboration and joint commitment goal of the CEDS is to provide a forum for local and regional organizations to identify and execute economic development policies and projects, and advance economic resiliency.

Two measures are used to gauge how the region is doing relative to this goal, the financial resources garnered to implement the CEDS and the forums established to foster regional partnerships. CEDS evaluation covers both the process and outcomes of these measures.

Funding and Implementation Resources

The Commission applied for and was awarded seven grants in FY20, with three applications still pending, for a grand total of \$2,469,848. Additionally, grants awarded in previous fiscal years that were still being disbursed in FY20 totaled an additional \$879,663 (Table 15).

Federal Granting Agency	Project	Award Period	Grant Award
Federal Highway/Federal Transit through Mass DOT	Combined Transportation and Transit Planning	10/1/19 - 9/30/20	\$779,649
Federal Highway Administration through Mass DOT	Bicycle Rack Program	4/7/20 - 12/31/2021	\$80,000
Economic Development Administration (EDA)	Cape Cod Resiliency Initiative	4/14/20 - 4/13/2022	\$1,050,000
Environmental Protection Agency (EPA) through University of Southern Maine	Technical Assistance Network for the Southeast New England Program (SNEP)	10/1/19 - 9/30/2024	\$190,000
			\$2,099,649
State Granting Agency	Project	Award Period	Grant Award
Department of Housing and Community Development	District Local Technical Assistance (DLTA)	1/1/20 - 12/31/20	\$192,999
Executive Office of Energy and Environmental Affairs (EOEEA) through Towns of Dennis, Eastham, Harwich	Municipal Vulnerability Preparedness	9/13/19 - 6/30/20	\$32,000
Executive Office of Energy and Environmental Affairs (EOEEA)	Model Coastal Resiliency Bylaw	11/1/19 - 6/30/21	\$145,200
			\$370,199

Table 15. Federal and State Grants Awarded to the Cape Cod Commission, FY20.

The BCEDC awarded grant funding through the License Grant Program in FY20. The total requested License Plate Grant funds equaled \$1,606,114 in FY20, with an overall match of \$1,886,329, for 29 total applicants. The total requested funds for major grants were \$1,490,699 (15 applicants) and the total requested funds for micro grants were \$115,415 (14 applicants). For the WCAI Micro Grant awarded, one job was created, and the \$10,000 grant leveraged an additional \$30,000 from private sources. For the Micro Grants awarded to FORWARD and the Town of Yarmouth, the jobs created and private funding leveraged are yet to be determined.

The major and micro-grant awards went to the following applicants:

FY20 LICENSE PLATE GRANT FUND PROGRAM

Micro Grants Awarded

FORWARD - \$10,000

Fund a Task Force and Market Analysis to evaluate the level of need for new affordable supportive rental housing for individuals with Intellectual and Developmental Disabilities (IDD), and to determine the most effective use of resources in addressing the built environment and service support needs of this population. We will set priorities for addressing those needs based on the data and knowledge derived from the Task Force and Market Analysis.

WCAI - \$10,000

Funds for radio/online reporter covering the human impacts of climate change across the Cape Cod region. By reporting on local efforts to respond to environmental change we increase public understanding of a complex issue, giving the region's residents vital knowledge to make better informed decisions in personal choices, local government and larger civic life.

Town of Yarmouth - \$10,000

Conduct a feasibility study and to perform identified building upgrades to accommodate expanded use at the former Laurence MacArthur Elementary School Building in Yarmouth (currently being leased to Bridgewater State University Cape Cod). The feasibility study would examine additional uses that could be integrated into the building and would identify building upgrades and necessary equipment purchases to accommodate these uses.

Major Grant Awarded

Association to Preserve Cape Cod - \$150,000

Support of a two-year joint project with Housing Assistance Corporation to identify key places where development of affordable housing can be supported by our organization, and where key natural resources should be protected from development... Our final product will include positive identification of places where environmentalists and housing advocates agree that we want housing built, because it will have the greatest positive impact on Cape Cod's environment, community and economy. In addition, HAC and APCC will recommend specific actions towns can take toward achieving housing and environmental goals, such as targeted re-zoning to encourage housing development, acquisition of priority parcels for housing or conservation, and recommendations of underutilized properties in activity centers that would be well-suited for housing.

Regional Forums and Partnerships

The Commission frequently partners with stakeholders throughout the region to accomplish the mission of keeping a special place special.

The [Regionalization for Greater Efficiency in Government](#) section above describes some of the key formal and informal partnerships the Commission maintains to carry out its economic development work. This includes the 15 towns' elected officials and staff; other regional planning agencies through participation in MARPA; transportation officials through Cape Cod MPO and CCJTC; staffing several regional committees (BCEDC, Cape Cod Water Protection Collaborative, Barnstable County Coastal Resources Committee), and providing support to the CCIWPF Management Board. Other groups in which Commission staff participated over the last year included the new Cape Cod Reopening Task Force, the OCEAN Corridor Alliance, the Cape Cod Climate Change Collaborative, the Lower Cape Housing Institute, and the Cape Cod Complete Count Committee for the 2020 Census, among others.

In August 2019, the Commission held the annual OneCape summit, bringing together nearly 300 local, state, and federal leaders (representing 136 organizations) dedicated to strengthening the region and protecting Cape Cod's environment. Plenary sessions, focused discussions, and hands-on learning experiences highlighted regional efforts to enhance and protect our natural, built, and community systems. The economy drove discussions on Day Two, especially around the impacts of our housing shortage on regional economic growth.

The Commission integrates in-depth stakeholder outreach into many of their plans, projects, and initiatives. In October 2019, the new Commission-led Cape Cod Climate Initiative had 200 participants at a series of meetings throughout the region, who provided input regarding planning

priorities, concerns, and barriers to moving climate adaptation and mitigation actions forward in the region.

Commission staff collected survey data for several initiatives, including:

- the Municipal Vulnerability Preparedness (MVP) Program
- Brewster Open Space and Recreation Plan
- Community Resiliency by Design Visual Preference Survey
- Yarmouth Bike Path Extension Feasibility Study
- The Business Impact Survey to better understand the impacts of COVID-19 on the local business community

In addition to the MVP facilitation and Local Comprehensive Plan (LCP) support Commission Planning staff provides, the Commission will also work with Bourne, Sandwich, Brewster, and Eastham to evaluate local bylaws and regulations, research best practices, and develop a model coastal resiliency bylaw, in order to mitigate and adapt to coastal changes. Adoption of these strategies will offer residents of Cape Cod increased protection from threats such as sea level rise and storm surge. The Commission continues to collaborate with four towns – Provincetown, Dennis, Chatham, and Falmouth – on the harbor management study, looking at the need for operations and maintenance funding for harbor infrastructure and the impacts of climate change on harbor-adjacent businesses.

EVALUATING THE ANNUAL IMPLEMENTATION PLAN

The final step in evaluating CEDS implementation and impact focuses on the previous year's implementation plan, which outlines exactly what elements of the five-year action plan the Commission committed to accomplish that year. The annual implementation plan is made up of four elements, and their measures are outlined below.

Administration and General Planning

The Barnstable County Economic Development Council (BCEDC) is an eleven-member board established to advise the Barnstable County Board of Regional Commissioners on economic development policy and investments. The BCEDC serves as the CEDS Strategy Committee and, together with the Cape Cod Commission, as the EDD Governing Board.

The BCEDC meets every other month. In FY20, the full BCEDC met seven times, with subcommittees (Grants Subcommittee, Nominating Committee, and the Executive Committee) meeting an additional five times.

The BCEDC administers the Barnstable County License Plate Grant Fund Program. Information on value and number of grant funds distributed is included above [in Funding and Implementation Resources](#).

BCEDC Membership	June 2020
Lauren Barker	CEO, Cape Cod Young Professionals
Rob Brennan	President, CapeBuilt Homes
Duane Fotheringham	President, Hydroid
Kara Galvin	Executive Director, Cape and Islands Workforce Board
Peter Karlson	CEO, NeuEon
Su Moran	Delegate, Barnstable County Assembly of Delegates
Paul Niedzwiecki	Vice President of Strategy & Government Affairs, Cape Cod Healthcare
Ron Bergstrom	Barnstable County Commissioner
Chris Flanagan	Executive Officer, Home Builders & Remodelers
Alisa Magnotta	Executive Director, Cape Cod Housing Assistance Corporation
Tammi Jacobsen	Director of Workforce Development & Training, Cape Cod Community College
Harold "Woody" Mitchell	Chair, Cape Cod Commission
Julie Wake	Executive Director, Arts Foundation of Cape Cod

There were eleven Development of Regional Impact (DRI) decisions completed in FY20. The Commission did not receive any new Chapter H or Growth Incentive Zone applications or renewals. However, there was a modification of the Hyannis Chapter H and a modification of the Bourne GIZ in FY20. Additionally, the Commission approved the West Harwich District of Critical Planning Concern in November 2019. The proposed district runs along Route 28 from the Dennis/Harwich Town line to the western shore of the Herring River and encompasses more than 20 significant historical structures dating as far back as the mid-1700s. The area serves as a gateway and local economic hub for the town of Harwich.

Through both its regulatory and planning capacities, the Commission assisted all 15 towns on Cape Cod in FY20.

Funding for CEDS projects accomplished by Commission staff relied primarily on the EDA Planning Grant, which covers 5-year updates and annual performance reports for the CEDS, coordinating the BCEDC, research/survey strategy, environmental economics work, STATSCapeCod and other data-related outreach projects, presentations and public outreach, and the CEDS Regional Priority Projects.

Additional external funding included the \$1.75 million grant from the US EPA's Southeast New England Program for Coastal Watershed Restoration (SNEP) to create the Southeast New England

Network and a \$145,200 grant in October to develop a model coastal resiliency bylaw from the state's Planning Assistance Grant Program. In April 2020, the Commission initiated work on the \$1 million grant received from EDA, which will contribute to regional economic resiliency and will develop a framework for action to respond to coastal hazards in Barnstable County.

Outreach and Information Sharing

The Commission is committed to outreach and information sharing, presenting to local and regional stakeholders, facilitating data sharing through STATCapeCod and web applications, and hosting the OneCape conference annually.

RESEARCH/DATA ANALYSIS

During this reporting period, the Commission launched a new website to better showcase regional plans, projects and initiatives, and relevant data sets. The website (www.capecodcommission.org) was completed in the fall of 2019.

The Commission also developed a COVID-19 data dashboard to showcase information relevant for pandemic recovery, available at www.datacapecod.com. This includes:

- Cape Cod Healthcare COVID-19 Community Alert System: a map of confirmed COVID-19 cases on Cape Cod by zip code and subregion
- COVID-19 Impact Planning Report for Barnstable County and towns: demographic and public health data for COVID-19 planning
- Monthly Employment and Wages by Industry: ES-202 data for Barnstable County and towns
- Seasonal Employment: monthly employment data from 1990-2020
- Unemployment: monthly Cape and Islands Workforce Development Area data by industry
- Housing Infographics: comparisons of average wages for top employment sectors in the county to housing costs and integrating unemployment scenarios
- Meals and Rooms Tax Revenues: data for all Massachusetts towns and potential losses resulting from decreased economic activity due to the pandemic
- Key Economic Indicators: demographic and economic data for the County and towns
- Cape Cod Traffic Trends: year-over-year daily and monthly traffic trends including for the Sagamore and Bourne Bridges

During this reporting period, the Commission published nine press releases and 26 newsletter articles related to economic development (out of 17 and 55 total, respectively). Commission staff gave 33 presentations and published nine reports and plans.

Targeted Technical Assistance to Towns

LCP DEVELOPMENT

After passing new streamlined Local Comprehensive Plan Regulations in July 2019, the Commission released updated LCP Guidance for the 15 towns, including a list of Frequently Asked Questions and Supplemental Resources.⁶⁷ LCPs articulate a vision and growth policy for a town, provide information about existing and expected conditions as it evolves, and if certified by the Commission towns can receive priority consideration for planning and technical assistance.

The Commission assisted Bourne in updating their LCP in compliance with the new regulations; Bourne was the first town to have an LCP certified under the new regulations in December 2019. Commission staff also met with and provided guidance for several other towns during this reporting period including Wellfleet, Truro, Brewster, and Provincetown.

RESET PROGRAM & INDIVIDUAL RESET PROJECTS

The Commission did not receive any requests for assistance through the RESET program this year.

WATER QUALITY PLAN DEVELOPMENT

The Commission continued to assist the four towns in the Pleasant Bay watershed (Brewster, Chatham, Eastham, and Orleans) as they implemented their watershed permit.

Commission staff issued 208 consistency determinations for projects listed on the Massachusetts 2020 Clean Water Intended Use Plan (IUP). In 2020, both Chatham and Barnstable were listed on the IUP for State Revolving Fund loans. Commission staff also worked with Town of Barnstable staff to complete an informal review of their town-wide Comprehensive Wastewater Management Plan (CWMP). The CWMP is currently in the Massachusetts Environmental Policy Act review process and the Commission anticipates issuing a 208 consistency determination once that process is complete.

Commission staff also assisted the Town of Wellfleet as they developed strategies to address nitrogen in Wellfleet Harbor and considered applying for a watershed permit through the Massachusetts Department of Environmental Protection (MassDEP). Staff will continue to assist as appropriate. Staff also reviewed the Town of Falmouth's Notice of Project Change for their CWMP and will complete a 208 consistency review upon submission of the revised plan to the Commission.

⁶⁷ Cape Cod Commission Updated LCP Guidance. https://www.capecodcommission.org/resource-library/file/?url=/dept/commission/team/Website_Resources/regulatory/LCP%20Guidance%20Document.pdf

Commission staff completed compliance reports for all 15 Cape Cod communities in an effort to track progress and share these efforts with both MassDEP and the US Environmental Protection Agency. Reports are located here: <https://capecodcommission.org/our-work/208/>.

Regional Initiatives and Projects Implementation

Commission staff developed a Year One Implementation Plan that outlined which projects and initiatives would commence in Year One.

COMPREHENSIVE AND ACTIVITY CENTER PLANNING INITIATIVE

Deliverables

The Commission passed new local comprehensive plan (LCP) regulations in July of 2019, which paved the way for new and updated LCPs from Cape communities. The Commission also released Local Comprehensive Plan Guidance to help towns move forward in developing their LCPs. Commission staff will continue to work with towns in Year Two as they update or develop their LCPs. The Regional Housing Plan will likely involve evaluations of the individual Community Activity Centers to better understand their opportunities and needs moving forward.

Measures

Since the passage of the new local comprehensive planning (LCP) regulations in July of 2019, several Cape towns are starting to update or develop their LCPs. Bourne was the first and only town to complete an updated LCP during this reporting period, receiving Commission certification in December. This LCP can now inform their planning efforts moving forward. Several other towns are in the midst of updating their LCPs. The Commission will continue to track LCP development in Year Two and beyond. Additionally, the Commission facilitated three towns' creation of online zoning portals with the company OpenCounter and is currently helping a fourth town get their zoning portal set up.

CREATIVE ECONOMY SECTOR INTEGRATION

Deliverables

Commission staff completed the ten-year update to "Leveraging Arts and Culture in Economic Development," which included an economic impact assessment of this industry on Cape Cod.

Commission staff maintained the arts/culture StoryMaps for Wellfleet and Orleans on the Commission website. Additional online materials related to the updated arts/culture guide will be completed in FY21.

Measures

Measures for this initiative are based on the recommendations in the updated arts and culture guide. Key recommendations from the guide include: protecting historic resources, including supporting the creation of historic and cultural districts, recognizing outstanding arts/culture/historic preservation efforts, and assessing and leveraging local assets such as historic resources; considering zoning revisions that would make artist live/work spaces allowed in towns to help foster the arts community; pursuing regional collaborations within the arts and culture sector; and working to provide and support consistent funding for arts and culture.

Currently, there are about 11,700 Massachusetts Historical Commission (MHC) inventoried buildings and structures on the Cape. Of those, about 39% are protected through Local Historic Districts and an additional 12.5% are protected through National Historic Districts or listing on the National Register of Historic Places. About 48% of the buildings and structures inventoried in MACRIS (Massachusetts Cultural Resource Information System) are not protected, including over 300 structures built before 1800. Another approximately 4,100 structures dating between 1800 and 1949 are also currently unprotected. Towns are, however, working on improving their inventories, which is a key step towards protecting these properties. In 2019, over 230 new inventory forms were submitted to MHC.

Most towns do not have a trained preservationist on staff (Falmouth and Barnstable are exceptions), so Commission staff continues to provide advisory assistance for smaller communities. Twelve Cape towns have demolition delay bylaws and almost all of those have strong delays of 12 months or more. The most recent change to a demolition delay bylaw was Falmouth's strengthening in November 2018. Brewster is exploring adoption of a demolition delay bylaw.

Several towns have begun working on new Historic Districts, which can take a long time to establish. South Chatham is pursuing a National Register district and a local historic district is being considered in East Orleans. Cape Cod Commission staff provides support for the development and designation of these new districts. Additionally, the number of preservation award programs in the region is growing, with Sandwich joining Barnstable and Chatham. Other towns, including Brewster and Wellfleet, are considering starting them.

Currently Barnstable and Provincetown have artist live/work space bylaws. Commission staff worked with Chatham to develop historic preservation incentives and with Falmouth, Barnstable, Orleans, Eastham and Sandwich to develop mixed use and dimensional regulations guidance through the Community Resiliency by Design (CRBD) project. Commission staff also worked with Barnstable to develop design principles and zoning changes to support neighborhood character in Hyannis. Commission staff is currently supporting the Town of Harwich as they develop new zoning that will better protect and enhance the historic character of West Harwich as part of a District of Critical Planning Concern.

REGIONAL CAPITAL PLAN

Deliverables

During Year One, Commission staff began developing the Scope of Work with Team, Timeline, and Budget.

In Year Two, Commission staff will complete the Scope of Work and pursue the remaining deliverables: Regional Capital Plan; Plan/Strategy Document including implementation plan, potential funding sources and budget; Inventory of Planned Infrastructure Improvements; and a Decision Support Tool to help identify coordination opportunities and potential funding.

Measures

The measures identified in the CEDS Implementation Plan will be tracked starting in Year Two (Number of projects identified and included in capital planning inventory; Number of coordinated projects begun/completed).

REGIONAL HOUSING PLAN

Deliverables

During Year One, Commission staff developed the Scope of Work and began data collection necessary for developing the Plan.

In Year Two, Commission staff will pursue the remaining deliverables: Plan/strategy document including implementation plan, potential funding sources, budget and a completed Regional Housing Plan.

Measures

The measures identified in the CEDS Implementation Plan will be tracked starting in Year Two (Number of housing units constructed compared with the identified regional, subregional, and town-specific housing supply goals identified in the plan; Implementation of recommended policies, actions, and strategies identified in the plan).

MODEL BYLAWS FOR ZONING AND DESIGN

Deliverables

During Year One, Commission staff completed the development of a Form-Based Code Framework.⁶⁸

⁶⁸ A Framework for Form-Based Codes on Cape Cod. Union Studio and Cape Cod Commission. 2019. https://www.capecodcommission.org/resource-library/file?url=/dept/commission/team/Website_Resources/crbd/FBC-Framework-FINAL.pdf

Commission staff collaborated with towns to provide recommendations for how they may support the development and adoption of form-based codes that address individual towns' needs, respond to and complement the local context, and help fulfill their community visions, including coordinating two workshops on form-based codes.

Commission staff have started development of new design guidelines for buildings located within the floodplain. During year two, Commission staff will look to begin updating the regional design guidelines.

Measures

Three towns have started developing new zoning that incorporates form-based code for select areas of their communities in Year One: Falmouth, Barnstable, and Chatham.

CLIMATE CHANGE MITIGATION AND ADAPTATION PLANNING

Deliverables

During Year One, Commission staff established a framework and methodology for calculating a greenhouse gas emissions inventory for Cape Cod, which were both assessed by a Review Committee that includes local, state, and regional expertise. Commission staff are evaluating feedback from the Review Committee and have begun collecting identified data needed to calculate the inventory.

Commission staff worked to confirm existing electric vehicle charging station locations and features, drafted recommendations for siting future electric vehicle charging station infrastructure and are creating a GIS StoryMap to present the charging station siting analysis and research. Additionally, the Commission analyzed and identified appropriate sites across the region for utility-scale solar installations. Work to date includes research on solar siting criteria and methods and identification of areas where solar development is preferred. Commission staff began identifying and mapping built and natural features to aid in establishing recommended siting locations, such as industrial areas, parking lots, and large commercial buildings.

Commission staff also continued to work with communities to implement the Massachusetts MVP Program, supporting the MVP designation process in two communities this past year: Dennis and Harwich. Commission staff facilitated two MVP Planning workshops during the reporting period. Building off of Eastham's MVP process from last year, Commission staff helped Eastham complete their Multi-Hazard Mitigation Plan. Commission staff also supported several communities in drafting MVP action grant proposals to implement the priority actions from their planning processes. Staff supported the Town of Sandwich proposal for their Downtown Resilient Vision project, as well as the towns of Wellfleet, Truro, Barnstable, Bourne, and Eastham for their Regional Low-Lying Road Assessment and Feasibility project.

The Commission's Cape Cod Climate Initiative was also launched during FY20 ([Regionalization for Greater Efficiency in Government](#)).

Measures

As of June 2020, all 15 communities on Cape Cod have completed the Municipal Vulnerability Preparedness process which affords them designation as an MVP community.

In Year Two, Commission staff will begin tracking the implementation/adoption of actions and policies to reduce regional greenhouse gas emissions, based on information from the regional greenhouse gas emissions inventory. Commission staff will continue to work on the electric vehicle charging stations and utility-scale solar installations site analyses as well.

Year Two Implementation Plan

The following outlines the work to be undertaken in Year Two of the 2019 CEDS by the Cape Cod Commission.

ADMINISTRATION AND GENERAL PLANNING

CEDS implementation requires the continuous involvement of Commission staff. Staff will continue to support and administer the CEDS Strategy Committee (BCEDC), which is engaged in the annual implementation review process and is responsible for granting partner agencies funding for CEDS projects and initiatives. Commission staff will also work with partner agencies to plan and obtain funding for CEDS projects and initiatives through Year Two. Examples of Commission support include regulatory review of large-scale projects in municipalities, technical assistance to towns using planning or regulatory tools to incentivize development in centers of activity, and support in submitting funding applications to the EDA and other federal and state agencies.

OUTREACH AND INFORMATION SHARING

Outreach is essential to the implementation of the CEDS and to maintaining the partnerships upon which it is built. Since 2015, the Commission has worked with partners throughout the region to hold the annual OneCape Summit that brings together hundreds of local elected leaders, municipal staff and appointed board members, industry practitioners, and community activists to discuss environmental and economic issues and solutions for Cape Cod. While the current future of large in-person gatherings and events is uncertain, Commission staff will continue to seek opportunities for fostering relationships and cross-sector learning on economic development.

Commission staff members will continue to make regular presentations to town staff and boards, local community groups and organizations, stakeholder groups, and the public as opportunities arise or upon request. Commission staff will also continue to present to Cape Cod Commission Members, BCEDC, Barnstable County Board of Regional Commissioners, and Barnstable County Assembly of Delegates.

The Commission continues to seek new ways to make information more accessible. STATSCapeCod continues to be the Commission’s primary vehicle for data relative to the economy. During the COVID-19 pandemic, Commission staff developed a COVID-19 data dashboard to provide demographic and economic data for Cape Cod towns, non-profit organizations, and businesses recovering from the economic impacts of COVID-19 in an easy to understand and use format. Commission staff will continue building upon this, as well as updating the STATSCapeCod website. Through tools and resources, such as those offered by ESRI and Tableau, the Commission provides information in a flexible, often map-based, format. The Commission is also working with several Cape Cod communities to make local regulations more accessible to the public through an online tool called OpenCounter. Commission staff will continue to seek additional opportunities for data sharing and interpretation.

TARGETED TECHNICAL ASSISTANCE TO TOWNS

The Commission will continue to provide targeted technical assistance to towns throughout the region on specific issues, including through Regional Economic Strategy Executive Team (RESET) projects as requested.

The Commission also supports towns through DLTA projects, based on annual municipal requests for assistance.⁶⁹ The DLTA Program is funded annually by the Commonwealth of Massachusetts to help municipalities with sustainable development and to encourage communities to form partnerships to achieve planning and development goals consistent with state and regional priorities. The Commission will continue to provide technical assistance to towns to help them complete Local Comprehensive Plans, as well as continue to support development and adoption of local water quality plans to improve the quality of the region’s groundwater, surface water, and drinking water.

Additionally, the Commission will assist towns as they work to recover from the COVID-19 pandemic, including providing technical assistance through the EDA CARES Act.

⁶⁹ Cape Cod Commission DLTA Program. <http://www.capecodcommission.org/index.php?id=50&maincatid=23>

REGIONAL INFRASTRUCTURE PLANNING INITIATIVE

Regional Capital Planning

The Commission will develop a regional capital plan that identifies key needs, priorities, and funding options for capital infrastructure and create tools for communities to help identify potential efficiencies. Development of the regional capital plan will include creating an inventory of planned infrastructure improvements, planning and implementing a facilitated public process around capital planning efforts, and identifying tools/resources needed to improve coordination and efficiency. Additionally, the Commission will develop a decision support tool to identify opportunities for collaboration to find efficiencies, reduce costs, limit disruption, and better coordinate access to funding sources. To achieve this, the Commission will finalize the scope of work started during year one and begin the planning process.

COMPREHENSIVE AND ACTIVITY CENTER PLANNING

Local Comprehensive Planning

The Commission will continue to work collaboratively with towns to update, certify, and implement Local Comprehensive Plans (LCPs) that address infrastructure needs, housing diversity and affordability, resource protection, and climate change mitigation.

Regulating for Housing and Economic Diversity

The Commission will continue to collaborate with towns to complete, update, and implement housing and economic strategies that focus development in centers of activity. This will involve conducting research to better understand the housing and economic development needs in centers of activity and providing support to the towns in drafting plans. Plans and regulatory changes should support sustainable development of 'the missing middle' housing types, housing affordability, and the clustering of business and residential uses.

HOUSING ACCESS AND AFFORDABILITY INITIATIVE

Regional Housing Plan

The Commission will develop a comprehensive regional housing plan that supports sustainable development of affordable and attainable housing options for Cape Cod residents of all income levels and ages. Commission staff will begin stakeholder outreach and implementing the scope of work completed in Year One. The plan will identify regional, subregional, and town-specific housing supply goals and appropriate areas for housing development, especially multi-unit development. It

will identify policies, actions, and strategies to further the goals of the plan, including how to foster infrastructure investment to support an increase in housing supply, and will include a community engagement strategy for education, visioning, and planning purposes.

CLIMATE CHANGE INNOVATION INITIATIVE

Climate Change Mitigation and Adaptation Planning

The Commission will continue advancing the Cape Cod Climate Initiative launched in FY20, including developing and implementing a stakeholder process to inform a climate action plan for the region. Commission staff will also engage with partners on the Resiliency Initiative to collect data and develop analyses, such as storm tide pathways analyses. The Commission will complete the greenhouse gas inventory in FY21 as well as siting analyses for electric vehicle charging stations and utility-scale solar installations, which began in FY20. The Commission will continue working with communities to implement state and local planning efforts to build climate and coastal resilience, such as the Municipal Vulnerability Preparedness Program and Green Communities Program.

In Year 2, the Commission will develop and implement a stakeholder process to inform development of a climate action plan for the region. Commission staff will also engage with partners on the Resiliency Initiative to collect data and develop analyses, such as the storm tide pathways analyses, to better prepare for and respond to the impacts of coastal hazards such as flooding.

Regional Economic Resiliency Information Clearinghouse

The Commission will work with project partners to establish an Economic Resiliency Information Clearinghouse focused on preparation for and recovery from economic and natural disasters. This project will also now consider economic recovery data needs related to the COVID-19 pandemic and better preparing for systemic shocks in the future. This will include conducting a gap analysis to identify research and data needs for key audiences, collecting data to fill identified gaps, developing materials for training and outreach on economic and natural disaster resiliency issues and potential solutions, and assembling and disseminating the information through an online portal.

LOCAL BUSINESS DEVELOPMENT INITIATIVE

Trades Workforce and Business Development Program

The Commission will collaborate with project partners to coordinate and work to expand trades-related workforce and business training programs, particularly those in the Marine Science and Technology industries. Project partners will include UMass Dartmouth, SRPEDD, Cape Cod Community College, local technical and vocational high schools, and employers and educational

institutions in the Southeast Massachusetts region. Project partners will market career options to students, including those in fisheries, aquaculture, and wind energy, and will collaborate with businesses, chambers of commerce, and educators to build apprenticeship, mentoring, and other programs that connect students and young adults to well-paid career options in the trades.

Workforce and Business Retention Program

The Commission will work with project partners to identify workforce and business retention issues on Cape Cod and develop a program that supports potential solutions for the region. Particular attention will be paid to ways to defray the high cost of support services needed by working families, debt reduction, housing, and healthcare. The program may expand outreach to potential employers off-Cape, creating opportunities for employment based within the region. This project will be expanded to respond to the severe economic impacts of the COVID-19 pandemic and will address local workforce and business retention issues within that framework.

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