CAPE COD
COMMISSION

2024 Comprehensive Economic Development Strategy (CEDS)

YEAR 2 ANNUAL REPORT

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

JUNE 2026

Prepared by Cape Cod Commission Staff.

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Performance Progress Report

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CEDS Annual Report 2026

YEAR TWO

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

Submitted to: US Department of Commerce Economic Development Administration

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Introduction

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

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

This CEDS Annual Report accounts for activities conducted during Year 2 of CEDS implementation (July 1, 2025 – June 30, 2026). It addresses adjustments to the CEDS strategy, summarizes recent economic development activities, leverages metrics to evaluate CEDS progress, and outlines next steps for the year ahead.

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

- Rosalin Acosta, Managing Director, Ernst & Young LLP
- Greg Bilezikian, Executive Director, Bilezikian Family Foundation
- Amanda Converse, Economic Development Coordinator, Town of Orleans
- Kara Galvin, Executive Director, Cape and Islands Workforce Board
- Cindy Horgan, Executive Director, Cape Cod Children's Place
- Tammi Jacobsen, Director of Workforce Development & Training, Cape Cod Community College
- Alisa Magnotta, Executive Director, Housing Assistance Corporation
- Christin Marshall, Executive Director, Cape Tide
- Kim McElholm, President & CEO, Cape Abilities (joined January 2026)
- Jack Stevenson, President, Mid-Cape Home Centers (through December 2025)
- Robert "Bert" Talerman, Co-President, Cape Cod Five Cents Savings Bank
- Mark Forest, Commissioner, Barnstable County Commissioner
- Tom Wilson, Chair, Cape Cod Commission
- John Ohman, Representative, Barnstable County Assembly of Delegates

Adjustment to the Strategy

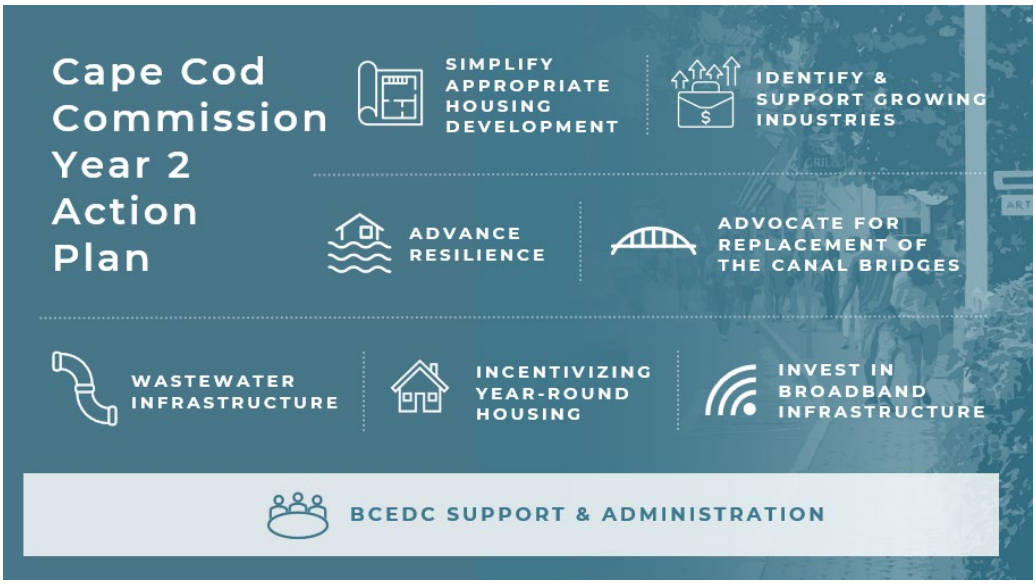
The Cape Cod Commission (Commission) and CEDS Strategy Committee remain committed to the economic vision for Cape Cod articulated in the 2024 CEDS: "A strong and vibrant Cape Cod. A region that supports a resilient, inclusive, and diverse year-round community with access to housing options, high quality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

region for centuries." During Year 2 of CEDS implementation, no adjustments to the strategy were identified or deemed necessary. The 2024 CEDS continues to reflect the economic development priorities of the region.

Report on Economic Development Activities

Throughout the CEDS planning and development process, key actions surfaced to advance the region's economic vision over the next five years and beyond. Many of the actions advance not one but multiple CEDS goals. While implementation of the key actions will take numerous actors from throughout the region, there are several key actions the Cape Cod Commission is responsible for advancing. Below is a summary of the Cape Cod Commission Year 2 Action Plan – those activities the Cape Cod Commission committed to advance during the second year of the 2024 CEDS.

Cape Cod Commission Year 2 Action Plan



BCEDC Support & Administration

Proposed Year 2 Activities

Commission staff will continue to provide administrative support for the BCEDC, providing technical support related to CEDS objectives, and pursuing funding in support of CEDS Action Plan implementation.

Accomplished in Year 2

The Commission provided administrative and technical support to the BCEDC and continued to work with them to implement the CEDS, track progress, and adapt and adjust the approach to

implementation as needed. The BCEDC met five times during the reporting period on 10/8/2025, 12/10/2025, 1/21/2026, 5/13/2026, and 6/10/2026. Additionally, during this reporting period, Commission staff held one-on-one conversations with all BCEDC members to get their feedback on how to most effectively utilize the BCEDC and their meetings. The nominating committee met once on 12/16/2025.

During Year 2, the BCEDC continued their work supporting economic development in the region. The BCEDC continued to administer the Cape Cod License Plate Grant Program funds awarded in early 2025. The program supports projects that align with key actions outlined in the CEDS, supporting a diverse range of activities in that help advance regional CEDS goals related to housing attainability, community, infrastructure, natural resources, workforce development, and economic diversity and resiliency. Funded initiatives are listed below.

Major Grant Recipients

- **Association to Preserve Cape Cod**
  $70,000 – Native Plant Growers Cooperative of Cape Cod
  To support the Native Plant Growers Cooperative of Cape Cod to ensure demand for native plants is met by local growers and help to support preservation of farmland on Cape Cod.

- **Housing Assistance Corporation**
  $70,000 – Rent 365
  A program designed to increase year-round rental opportunities on Cape Cod by offering landlord education and increased incentives to encourage units to be rented year-round, including a small incentive to offset real estate tax for the landlords who participate for years two and three.

- **Mashpee Wampanoag Tribe**
  $70,000 – Broadband Expansion Project
  To expand broadband infrastructure and support the Tribe's efforts to become a sustainable internet service provider. The project aims to deliver fast, reliable, and affordable internet to non-tribal homes and businesses in alignment with the Tribe's commitment to community connectivity.

- **Cape Cod Children's Place**
  $20,000 – Wellspring Project
  To support the Wellspring project, which equips professionals with skills and evidence-based tools to address the complex needs of children and families, promoting a sustainable year-round workforce.

Micro Grant Recipients

- **Arts Foundation of Cape Cod**
  $15,000 – Creative Exchange
  To support the Creative Exchange Program, a personal and professional development program for all who work in the arts sector on the Cape and the Islands.

- **Cape Cod Community College**
  $25,000 – Equity Leaders Program
  To support the Equity Leaders: Building Inclusive Workplaces on Cape Cod program, which will offer sector-specific Diversity, Equity, Inclusion, and Social Justice (DEISJ) and Diversity, Equity, Inclusion, and Belonging (DEIB) training.

- **Entrepreneurship for All**
  $15,000 – Business Accelerator Program
  To support EforAll's 2025 Spring and Fall business accelerators, which provide aspiring entrepreneurs with business education, dedicated mentorship, and cash prizes to turn their ideas into local ventures.

- **Love Live Local**
  $15,000 – Retail Incubator & Boost Your Brand Workshops
  To support the Retail Incubator and Boost Your Brand Programs, which provide affordable retail space, support, and training to entrepreneurs and small businesses, especially women-owned and BIPOC-owned businesses.

These projects were supported by the grants into Year 2 of the CEDS reporting timeline.

Also in Year 2, the Commission hosted the 2025 OneCape Summit, September 16 and 17 in Harwich, MA. The summit featured presentations and conversations on the intersection between Cape Cod's environment and economy. Over 400 people attended the conference with 155 businesses or organizations represented. The OneCape Summit schedule and details are available here: https://onecape.capecodcommission.org/2025-onecape-summit/.

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

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

Simplify Appropriate Housing Development

Proposed Year 2 Activities

Commission staff will work with local municipalities to develop and adopt new zoning that will allow for different types of housing through simpler permitting processes, including through encouraging adoption of pre-approved plans.

Accomplished in Year 2

Commission staff worked with a consulting team to finalize model housing plans that towns can choose to adopt as pre-approved. Additionally, Commission staff worked with the Town of Sandwich

to develop new draft zoning for an area in town, which tentatively includes utilizing some of the model housing plans as pre-approved. The plans are available online from the designers for free or a reduced fee.

Incentivize Year-round Housing

Proposed Year 2 Activities

The Commission will continue working with a consulting team developing a strategy for establishing a program or programs to incentivize year-round occupancy of housing units. This study will lay the groundwork for understanding what types of programs would be most effective in incentivizing year-round housing in the different communities in the region.

Accomplished in Year 2

The Commission worked with consultant Outwith Studio to research the structure and implementation of year-round incentive programs nationally and develop recommendations for incentive programs for year-round housing for Cape Cod. These incentives can include one-time payments to homeowners for placing deed restrictions on existing year-round units or to current seasonal home or short-term rental owners to convert their properties to year-round use. Additionally, the research examined annual incentive payments for short-term rental owners who switch to renting their homes year-round on a year-to-year basis. The completed report provides an overview of the year-round incentive program landscape; helps to give a sense of the scale of subsidy needed for such programs on Cape Cod; identifies some of the non-financial barriers and solutions to implementation and program participation; and provides program design guidance for potential implementers.

As part of this work, the Commission and its consultants conducted stakeholder interviews with regional entities that currently administer housing incentive programs, as well as with short-term rental owners, real estate professionals, municipal staff, and others during this reporting period. These interviews were designed to collect insights into the region's housing markets, assess perceptions of potential incentive structures, and gather input to ensure feasibility of potential programs. In addition to regional outreach, the project team also conducted interviews with jurisdictions elsewhere across the nation that have implemented or piloted similar incentive programs to identify best practices and lessons learned. The report and accompanying recommendations are available on the Commission's website: https://www.capecodcommission.org/our-work/yr-housing/.

Invest in Water Quality and Wastewater Infrastructure

Proposed Year 2 Activities

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

Accomplished in Year 2

During this year of CEDS implementation, the Management Board awarded over $37 million in final subsidies to seven Cape Cod towns, while continuing to provide additional subsidy to four towns for water pollution abatement work that pre-dated establishment of the Fund. The Management Board also executed contracts to continue funding on-going regional coastal and freshwater quality monitoring and voted to expand the freshwater monitoring program to include an additional 25 freshwater ponds. In addition, the Management Board amended its regulations to provide clarity to potential new member communities interested in joining the Fund.

Invest in Broadband Infrastructure

Proposed Year 2 Activities

Commission staff will continue to support organizations and agencies looking to implement recommendations from the Regional Broadband Needs Assessment. Staff will also continue to monitor opportunities for broadband infrastructure investment and internet access and adoption initiatives.

Accomplished in Year 2

Commission staff continued to collaborate with several towns in support of the implementation of projects identified in their digital equity plans. All five towns that the Commission supported in developing their local digital equity plans had their implementation projects approved. All five implementation projects are underway. Commission staff also supported an additional town submitting and being awarded an implementation grant. Commission staff continue to support programs related to broadband and digital equity through the developed partnerships with Healthy Aging Cape Cod, an initiative led by Barnstable County's Health and Human Services Department. Commission staff supported Healthy Aging Cape Cod in hosting an Age Tech event focused on leveraging technology to address broadband and digital equity challenges of the Cape's aging population.

Commission staff have continued to participate in conversations related to broadband deployment on Cape Cod, however, funding uncertainty in this area has undercut momentum.

Advocate for Replacement of the Canal Bridges

Proposed Year 2 Activities

Commission staff will continue to participate in the Canal Bridges Advisory Group, provide updates and information to regional and local entities looking to engage in the Canal Bridges conversations, and maintain information on the consequences of inaction. The Commission will also initiate conversations about traffic management activities that may be needed to address any potential travel disruptions and impacts on business during construction activities.

Accomplished in Year 2

The Commission has continued to advocate for the replacement of the Cape Cod Canal bridges. Commission staff coordinated with MassDOT, federal partners, and consultants on elements of the program and funding. Commission staff prepared and presented on updates to the Regional Transportation Plan and Transportation Improvement Program to support federal permitting and funding efforts. Outreach and stakeholder engagement on the program continued to support awareness and understanding of the project and keep key stakeholders apprised of major project milestones. Outreach included participation on the Cape Cod Bridges Advisory Group, presentation to the Cape and Islands Bridges Coalition, leading a talk hosted by the Cape Cod Technology Council, being the feature for a local Sunday radio program, and giving updates to various regional and local groups including the Chatham Rotary Club, the Mid-Cape Men's Club, and the MassHire Cape Cod Board.

Support Growing Industries

Proposed Year 2 Activities

The Cape Cod Commission and Cape Cod Chamber of Commerce will work together to conduct an analysis to determine which industries in the region have been growing over the last 5-10 years, and which assets and opportunities exist on Cape Cod for new industries. The analysis will help provide guidance for anticipated staffing and business needs for new and innovative industries and their evolution.

Accomplished in Year 2

The Cape Cod Commission developed a draft scope of work to complete this analysis in the coming year.

Advancing Resilience

Adopting Floodplain Regulations

Proposed Year 2 Activities

Commission staff will work with municipalities, Barnstable County Cooperative Extension staff, and other partners to use model coastal floodplain regulations and bylaws to build support for and customize local regulations for local adoption by town boards or through town meeting to improve coastal resiliency.

Accomplished in Year 2

Commission staff have worked with the towns of Chatham, Harwich, and Orleans to advance floodplain protections within local wetland regulations, and have presented at meetings in these towns to support understanding of the draft regulations. These three towns are working toward adoption of these regulations within the calendar year.

Tax Assessment

Proposed Year 2 Activities

Commission staff will work with a consultant to understand the geographic location of tax assets of Cape Cod communities and identify those areas that are particularly vulnerable to natural disasters and how such disasters or destruction of those properties could impact the region's tax base.

Accomplished in Year 2

Commission staff put out an RFP for a consultant to conduct an analysis of the region's tax base, helping to identify the financial impacts of different land uses and development patterns, as well as the potential vulnerabilities in the region's tax base due to natural disasters and properties that could be impacted. Commission staff contracted with a consultant in spring of 2026 to carry out this work, which will be completed in Year 3.

Local Resilience Plans

Proposed Year 2 Activities

Commission staff will continue working with the Town of Eastham to develop resilience plans for the town.

Accomplished in Year 2

Commission staff worked with the Town of Eastham to complete the Eastham Climate Action Plan, which was approved by the Select Board in May 2026. The plan was developed through extensive community engagement and a review of existing plans and best practices, with input from full- and part-time residents, business owners, local organizations, municipal staff, and partners. It integrates climate mitigation, adaptation, and resilience across five focus areas: Buildings, Energy,

Transportation, Natural Resources, and Community. The plan will serve as a vital tool for the Town and its residents, guiding local actions, priorities, and investments.

Commission staff also supported the Town of Truro in their development of a Climate Action Plan.

Advancing Low-Lying Roads Projects

Proposed Year 2 Activities

Commission staff will continue to collaborate with towns to prioritize, advance designs, and identify funding to remediate vulnerable low-lying roads (LLRs).

Accomplished in Year 2

- Yarmouth has been working with a consultant and the community to identify low lying road (LLR) priorities with a focus on emergency access/egress.
- MassDOT is in the process of developing design alternatives to floodproof the Orleans/Eastham Rotary and is also working on solutions for Boat Cove Creek culvert at Route 6A.
- Falmouth is working on resiliency for Surf Drive, as well as other LLRs in town.
- Barnstable has finished work to maintain access (road and parking) to Sandy Neck Park.
- Truro is working to upsize culverts and address LLRs along the Pamet River.
- Chatham is working to upsize the culvert at Frost Fish Creek.
- Wellfleet is elevating the LLRs associated with the major restoration of the Herring River.
- The Cape Cod Conservation District continues its years-long work to open undersized culverts in order to restore tidal flow, in the process reducing flood risk in many locations. Many partners are involved in each of these projects.

Partner Actions

Below is a summary of some of the work done to advance CEDS actions during Year 2 of the 2024 CEDS by organizations other than the Cape Cod Commission.

Incentivize Year-round Housing

Community Development Partnership

The Lower Cape Community Housing Partnership, which is a Community Development Partnership initiative, supports municipal officials and staff with resources and education around building support for affordable housing. A component of this, the Lower Cape Housing Institute (LCHI) hosted five workshops and four quarterly peer groups by the end of the fiscal year. As of May 13, 2026, there were 129 unique participants, with 322 total attendees; 41 people were new participants. This year, the curriculum incorporated an economic development lens, with some of the workshops dedicated to expanding municipal leaders' knowledge in this area. Topics covered were Economic Development 101, Why Small Business Exit Planning Matters to our Communities,

and All About Form-Based Code & Design Standards. The LCHI has been critical in building a shared understanding of the strategies and policies needed to increase housing production across the Lower and Outer Cape. With economic development and housing deeply interconnected, the program now seeks to foster a similar shared understanding around economic development.

Housing Assistance Corporation

During this period, Housing Assistance Corporation (HAC) continued administering the Rent 365 Incentive Program, which encourages property owners to convert seasonal rentals into year-round housing. Now in its third iteration since 2018, the program was relaunched in February 2025 with funding from Barnstable County through the Economic Development Council License Plate Grant Program.

Current incentives include: $4,000 (1-bedroom), $5,000 (2-bedroom), $6,000 (3+ bedrooms), and $10,000 for accessory dwelling units (ADUs). Funds are distributed over two years (three years for ADUs) to ensure continued year-round use. A $500 lease renewal bonus supports landlords who extend beyond the required term. During this reporting period, 9 additional units were converted to year-round housing. As of November 2025, the program was fully subscribed. HAC is actively seeking additional funding to continue expanding year-round housing using existing stock.

In this reporting period, HAC also partnered with local REALTORS® to offer educational sessions for current and prospective landlords, focused on the opportunities and challenges of converting short-term or seasonal rentals into year-round housing. These sessions covered key topics including local rental market trends, financial considerations, tenant screening, lease structuring, and best practices in property management. The program also highlighted the benefits and requirements of the Rent 365 Incentive Program, helping landlords better understand how to participate and succeed. These educational efforts complement the financial incentives offered through Rent 365 and represent a broader strategy to support behavior change among property owners. Program materials and recordings are available at: https://housingtoprotectcapecod.org/landlord-365-2/.

Provide Opportunities for Organizations and Entrepreneurs to Pilot Ideas

Community Development Partnership

The Community Development Partnership (CDP) provides workshops, technical assistance, and micro loans to all business owners who live or work on the Lower and Outer Cape. This includes businesses that are starting, stabilizing, and growing. For fiscal year 2026, CDP provided technical assistance to 217 small business owners and 24 workshop sessions for a total of 395 attendees.

This year, CDP staff worked with 30 clients looking for small business financing and helped with creating business plans, building cash flow projections, developing loan applications and identifying appropriate funding opportunities. The CDP provided $15,000 in business financing to one small business owner, with 5 loan clients in the pipeline.

In addition, staff developed two new programs this year. The Exit Planning Strategies Workshop, launched in April, helps small business owners begin planning for the future of both themselves and their businesses. Also new is a pilot program to help start homebased childcare businesses to address the lack of childcare services across the region: the program connects future businesses with Clarendon Early Education Services for education and start-up support. The CDP provides small business technical assistance/training and small start-up grants with funding from the Kelly Foundation. Currently there are eight women in the program, who are all expected to be fully licensed by November.

Cape Cod Chamber of Commerce and Cape Cod Blue Economy Foundation

In support of entrepreneurship, the Cape Cod Chamber of Commerce and Cape Cod Blue Economy Foundation continued support for an Entrepreneur's Peer Group with 10 Cape Cod small business owners for a second successful year of in-person support. The Cape Cod Chamber of Commerce also offers programs such as Maximize Your Membership and Truly Boss where businesses learned how to take their business to the next phase.

In January 2026 the Cape Cod Chamber of Commerce and Cape Cod Blue Economy partnered to support the launch of CapeTide Economic Development Corporation with the mission of strengthening Cape Cod's economy by supporting small businesses and expanding access to entrepreneurial education, resources, and a community of champions. In May, 7 entrepreneurs presented their business ideas at a public event after a three-week intensive program.

Love Live Local

Building on last year's momentum, Love Live Local served 428 unique small business owners and entrepreneurs across Cape Cod through a range of interconnected programs. Love Live Local Fests supported 141 unique vendors over three events — connecting makers, artists, and emerging brands with local consumers while providing promotional and business development support. The Boost Your Brand workshop series continued delivering technical assistance and brand mentorship to 18 participants. Love Live Local also successfully launched the Love Local Card perk program, enrolling 142 businesses as Perk Partners and rewarding consumers for shopping local. Additionally, the online business directory — anticipated in last year's report — launched successfully with 292 local businesses listed, and 237 small businesses participated in Love Live Local's print publications, including the 2025 Love Local Gift Guide and the 2026 Love Local Field Guide, providing regional visibility and marketing reach to locally owned businesses across Cape Cod.

Support Year-round Community Activity and Civic Engagement

Community Development Partnership

The Community Development Partnership (CDP) hosts a resident advocacy program, "Project 365" in six towns: Truro, Eastham, Harwich, Provincetown, Wellfleet, and Orleans. Each cohort has a total of about twenty members. Core leaders meet monthly, follow town activities and meetings, and learn about topics relevant to the goals of the CEDS related to housing, civic engagement, and more. The

program provides support for developing and maintaining grassroots groups in the communities that engage at the town level. CDP plans to continue building these resident groups in each of the eight Lower Cape towns.

Develop and Connect Students and Workforce to Educational and Training Opportunities

Cape Cod Chamber of Commerce

The Cape Cod Chamber of Commerce is nearing completion of a two-year Cape Based Commercial Driver's License Training Program. From July 2025 to date, the program has enrolled 20 individuals with 10 completing their training by May 2026. The program has enrolled a total of 50 individuals, 37 have completed training and acquired commercial drivers' licenses. The average hourly wage increase for program graduates is $6.29.

MassHire Cape and Islands Workforce Board

MassHire Cape & Islands Workforce Board (CIWB) continues to collaborate with their vocational school partners to assist job seekers in earning industry credentials and secure employment through the Career Technical Initiative (CTI) programs which offer free short-term, hands-on manufacturing training for unemployed and underemployed adults. The CIWB continues to strengthen career pathways within the healthcare sector through their Healthcare Hubs grant. This initiative has created valuable opportunities for adult learners by providing access to free training programs that prepare participants for in-demand healthcare careers. Through strong partnerships with Upper Cape Tech and Broad Reach Healthcare, the CIWB has helped participants gain the skills and credentials needed for employment while also addressing the growing workforce needs of healthcare employers across the region. By investing in healthcare training, the CIWB is helping participants achieve economic self-sufficiency while supporting one of the region's most critical industries. This collaborative approach continues to create meaningful career opportunities and strengthen the healthcare workforce pipeline.

MassHire Cape & Islands Workforce Board, also successfully administers the Connecting Activities and YouthWorks programs throughout the region, creating meaningful work-based learning opportunities for high school and college students while exposing young people to career pathway education across a variety of industries. Through internships, mentoring and career-connected learning experiences, these programs help students develop essential workplace skills, explore career interests, and build connections with local employers. Included within this youth programming is their award-winning ArtWorks Program, which has been providing students in grades 8-12 with hands-on mentoring for three decades. Working artist mentors working in a wide range of artistic mediums and immersive experiences provide students with valuable technical and employability skills while exploring career opportunities within the creative economy. By connecting education, mentorship, and real-work experiences, Connecting Activities and YouthWorks continue

to play a vital role in growing the region's future workforce and strengthening career pathways for young people across the region.

Cape Cod Community College

Cape Cod Community College (4Cs) significantly expanded its healthcare workforce training and equity-focused programming during this reporting period. The Center for Community and Professional Education (CCAPE) at 4Cs offered a robust suite of healthcare programs including Certified Nursing Assistant (CNA), Community Health Worker (CHW), Medical Interpreter Training, Addiction Recovery Coach pre-certification, Fundamentals of Documentation for Billing & Coding for CHWs, Medication Administration Program Certification, AHEC Health Scholar programming, and Mental Health First Aid and Verbal Intervention De-escalation training in response to growing demand from frontline healthcare partners. The CNA program, supported by a multi-year DESE contract that covers tuition for eligible students and includes job placement tracking, enrolled 72 students this period with 70 completing the program—a strong indicator of both program quality and the effectiveness of wraparound supports provided to learners.

In a significant equity initiative, Cape Cod Community College was awarded a Massachusetts Department of Early Education and Care (EEC) Multilingual Contract for FY26—with planned renewals through FY28—to support more than 70 multilingual early childhood educators in completing the ECE Foundational Certificate Program in Brazilian Portuguese, providing a pathway to a higher education certificate and, ultimately, an associate degree. To further strengthen access for multilingual learners, CCAPE developed an ESOL Bridge to CNA program designed to prepare English language learners for enrollment in the CNA program, and implemented a monthly in-house language assessment process for all students seeking to enroll in all of CCAPE's career training programs—ensuring appropriate placement, academic support, and equitable access to workforce pathways.

CCAPE also advanced regional industry development through completion of a comprehensive HVACR employer needs assessment with 53 regional employers, confirming a critical gap in heat pump technician training, and initiated the College's first Massachusetts Division of Apprenticeship Standards Registered Apprenticeship Program in Marine Outboard Technology in partnership with regional marine employers. This year, CCAPE also undertook foundational planning for its first formal Industry Advisory Committee, with working industry groups organized around CNA, Marine Technology, and HVAC, in addition to the main advisory group, with a full launch anticipated for September 2026.

Identify and Support Growing Industries in the Region

Cape Cod Blue Economy Foundation

The Cape Cod Blue Economy Foundation held WaterWORKS: Blue Economy and STEM Career Exploration Day on Tuesday, January 13, 2026. The event hosted 50 business and non-profit organizations, 300 high-school students, and 70 job seekers from the public.

With Cape Cod Community College's Center for Community and Professional Education (CCAPE), the Cape Cod Blue Economy Foundation hosted two WaveMakers Blue Economy Employer Forums each attended by approximately 30 individuals from Cape Cod, Rhode Island, and New Hampshire to learn about the CEDS, collectively identify employer specific challenges in line with CEDS, and then to identify common challenge themes with the next forum in June 2026 focusing on brainstorming solutions and ongoing employer education. The Cape Cod Blue Economy Foundation Executive Director was appointed to and sworn in on the Massachusetts Seaport Economic Council to represent the Cape region's blue economy interests at a state level.

Cape Cod Chamber of Commerce

The Cape Cod Chamber of Commerce adopted the Cape Cod Climate Change Collaborative with the intent to engage the business community in climate change mitigation and adaptation to protect their individual businesses, increase the overall sustained health of the regional economy, protect lives, and ensure the region remains a welcome place for millions of visitors throughout the year. The Cape Cod Climate Change Collaborative is focused on three core initiatives: investigating private property insurability, grid infrastructure resilience, and municipal climate action in support of the Cape Cod Commission's ongoing Climate Action Planning.

Advance Resilience

Cape Light Compact

Cape Light Compact continued to administer energy efficiency programs and has worked to expand program offerings over the course of 2025 in conjunction with other energy efficiency program administrators across the Commonwealth. In addition, Cape Light Compact recently completed its strategic electrification and energy optimization demonstration project that supported low- and moderate-income customers: (1) converting their oil, propane or electric resistance heat to cold climate air source heat pumps; and (2) installing solar photovoltaic systems to support electrification of their heating systems. The majority of the participants had installations by the end of 2025.

Some accomplishments include:

- 691 HEAT Loans administered
- 2,424 Home Energy Assessments, 112 Business Energy Assessments
- 1,027 homes installed heat pumps, 53 installed for businesses
- 1,330 homes weatherized, 37 businesses weatherized
- Over $45 million in participant incentives
- Over $62 million in total program costs
- Over $144 million in benefits

Evaluation of Progress on Action Plan & Goals

Evaluation of progress on the CEDS involves three types of metrics or indicators: macro level, programmatic, and qualitative. Macro level indicators are high-level data that is collected regularly. Macro indicators may not change significantly in short amounts of time (e.g., one year) but they are important in understanding the region generally and its trends. Programmatic indicators are related directly to the implementation and administration of efforts and initiatives that are important to the CEDS (e.g., completing an analysis or convening stakeholders). Qualitative indicators include contextual information about progress on key initiatives of the CEDS. Updates in the previous section, Report on Economic Development Activities, are qualitative indicators. The following macro and programmatic indicators will help illustrate the region's progress toward achieving its economic vision and goals and where new or expanded planning and action may be needed.

Macro Indicators

The following table includes the latest data related to the Macro Indicators outlined in the CEDS and indicative of the progress towards CEDS implementation. Latest available data are used; for some metrics that is 2024 data, whereas for others it is 2025. In some cases, the amount of change in data may be within the margin of error between the two years (noted with an *), however over the course of five years, trends should become apparent.

Year-round Population			
	2023	*2024*	*Change*
Total Population	231,735	232,570	+835
Source: American Community Survey 1-year Estimates for Barnstable County, Table DP05			
Age and Racial Diversity			
	2023	*2024*	*Change*
Median Age (Years)	56.3	56.1	-0.2 years*
Age 65 & Older	34.3%	35.0%	+0.7%
Under 18 Years Old	13.6%	13.6%	-
Race			
White	86.8%	86.5%	-0.3%*
Black or African American	2.4%	2.3%	-0.1%*
American Indian and Alaska Native	1.0%	0.5%	-0.5%*
Asian	1.7%	1.2%	-0.5%*
Native Hawaiian and Other Pacific Islander	0.0%	0.0%	0.0%
Some other race	1.0%	2.5%	+1.5%*
Two or more races	7.1%	6.9%	-0.2%*
Source: American Community Survey 1-year Estimates for Barnstable County, Table DP05			

Percentage of Housing Units Used Seasonally		
2023	*2024*	*Change*
31.1%	29.7%	-1.4%*
Source: American Community Survey 1-year Estimates for Barnstable County, Tables B25004 and DP04		

Median Homes Sales Price (for both Single-Family Homes and Condos)		
2024	*2025*	*Change*
$715,000	$739,000	+$24,000
Source: Cape Cod and Islands Association of Realtors, 2025 Annual Report on the Cape Cod Housing Market		

Inventory of Homes for Sale			
	2024	*2025*	*Change*
Single-family Homes	508	438	-70
Condominiums	180	160	-20
Source: Cape Cod and Islands Association of Realtors, December 2025 Market Activity Report for Barnstable County			

Housing Affordability Income Threshold			
	2023	*2024*	*Change*
Income needed to afford a median priced home	$230,000	$218,000	-$12,000
Source: CCC Calculations. Affordably purchase means a household spends 30% or less of income on housing costs. Values have been rounded.			

Percent of Housing Stock That is Detached Single-Family Homes		
2023	*2024*	*Change*
80.4%	80.5%	+0.1%*
Source: American Community Survey 1-year Estimates for Barnstable County, Table DP04		

Number of Units on the State's Subsidized Housing Inventory	
September 2025	7,364
Source: MA Executive Office of Housing and Livable Communities	

Labor Force Participation Rate			
Population 16 Years and Older	*2023*	*2024*	*Change*
Barnstable County	57.9%	55.9%	-2.0%
Massachusetts	67.2%	67.2%	-
Source: American Community Survey 1-year Estimates for Barnstable County, Table DP03			

Unemployment Rates			
	July 2025	*January 2026*	*Difference*
Barnstable County	3.9%	7.4%	+3.5%
Massachusetts	4.7%	5.2%	+0.5%
Source: MA Department of Economic Research, Unemployment Rates in Massachusetts			

Top 10 Industries by Year Over Year Growth in Employment				
Average Monthly Employment	*2023 Average Monthly Employment*	*2024 Average Monthly Employment*	*Nominal Change*	*Percent Change*
Health Care and Social Assistance	14,982	15,276	+294	+2.0%
Public Administration	5,366	5,628	+262	+4.9%
Administrative and Waste Services	4,274	4,471	+197	+4.6%
Wholesale Trade	1,723	1,797	+74	+4.3%
Management of Companies and Enterprises	527	593	+66	+12.5%
Utilities	565	623	+58	+10.3%
Arts, Entertainment, and Recreation	3,684	3,691	+7	+0.2%
Mining, Quarrying, and Oil and Gas Extraction	86	91	+5	+5.8%
Educational Services	7,337	7,340	+3	0.0%
Agriculture, Forestry, Fishing and Hunting	299	302	+3	+1.0%
Source: MA Department of Economic Research, Employment and Wages Report ES-202, *2023 and 2024 Annual Reports*				

Industry Mix for Top 10 Industries by Percent of Average Employment			
Percent of Total Average Monthly Employment	*2023*	*2024*	*Change*
Accommodation and Food Services	16.4%	16.3%	-0.1%
Health Care and Social Assistance	15.6%	15.9%	+0.3%
Retail Trade	15.4%	15.1%	-0.3%
Construction	8.2%	8.0%	-0.2%
Educational Services	7.6%	7.6%	-
Source: MA Department of Economic Research, Employment and Wages Report ES-202, *2023 and 2024 Annual Reports*			

Median Household Income			
	2023	*2024*	*Change*
Median Household Income	$89,893	$87,925	-$1,968*
Source: American Community Survey 1-year Estimates for Barnstable County, 1-Year Estimates, Table S1901			

Average Annual Wages for Top 5 Industries by Employment			
	2023	*2024*	*Change*
All Industries	$62,140	$64,688	+$2,548
Accommodation and Food Services	$38,584	$40,092	+$1,508
Health Care and Social Assistance	$70,460	$73,580	+$3,120
Retail Trade	$44,512	$44,980	+$468
Construction	$77,896	$80,964	+$3,068
Educational Services	$64,480	$67,496	+$3,016
Source: MA Department of Economic Research, Employment and Wages Report ES-202, 2023 and 2024 Annual Reports			

Many of these indicators are available on the Cape Cod Commission's Data Cape Cod website, which provides interactive dashboards with economic and demographic data for the region, from varying sources. The dashboards often provide information at the town and county level, allowing users to access data at the scale most relevant for their needs. As the CEDS is implemented and continues to evolve, so too will Data Cape Cod. The website will continue to make information easily accessible to stakeholders throughout the region as they pursue planning and projects.

Programmatic Indicators

- Changes in zoning to allow for more housing opportunities: 6 *towns adopted zoning to allow for more housing opportunities during this reporting period (Bourne, Brewster, Chatham, Falmouth, Orleans, Truro)*
- Entrepreneurs served by support programs: *More than 400 served by programs by the Community Development Partnership, Cape Cod Chamber of Commerce, and Love Live Local*
- Number of people completing training programs: *150 participants in programs led by the Cape Cod Chamber of Commerce and Cape Cod Community College*
- Number of resiliency projects: *Cape Light Compact administered its Energy Efficiency Programs*
- Number of local resilience plans: *1 completed (Town of Eastham)*
- Publicly accessible EV charging stations: *274 ports*
- Investment in wastewater infrastructure projects: *$212,430,000 in projects listed on the 2026 Clean Water Intended Use Plan (Cape Cod and Islands Water Protection Fund Subsidy Total: $53,107,500)*
- Number of pond remediation and restoration projects: *14*

Town	Project(s) Description
Dennis	Improved stormwater management and enhanced flood storage capacity and ecological function of Pound Pond
Eastham	Conducted a vegetation survey in Schoolhouse-Ministers Pond which will allow for invasive species management; replaced the aerators in these ponds; also seeking funding from local community preservation funds for an alum treatment in Herring Pond
Falmouth	Treatment of invasive fanwort in one half of Cedar Lake in 2024; determined remaining half should/will be treated in summer 2026
Mashpee	Full diagnostic assessment of Mashpee-Wakeby Pond in 2025, and received funding for phase 1 alum treatment; also completed restoration of the boat ramp at this pond, including stormwater management; various improvements at Santuit Pond, including stormwater management,

Town	Project(s) Description
	restoration of town landing, and educational features, including elements honoring the Wampanoag Tribe
Orleans	Alum application in Baker's Pond; sewer construction in areas within watershed to Uncle Harvey's Pond; Town is beginning sewer construction for areas within watershed to Crystal Lake and Pilgrim Lake
Wellfleet	Replacement of tide gate and culvert at Hawes Pond to allow for tidal flow
Yarmouth	Drainage improvements within watershed to Seine Pond

- Acres of land preserved for open space: *92,628 acres*
- Locations served by broadband: *99.7%*

Locations Served by Broadband: 144,614 Total Locations		
Provider	*Number of Locations (Residential and Commercial)*	*Percentage Served*
Comcast/Xfinity	144,211	99.7%
Verizon (Fios)	3,018	2.1%
OpenCape	223	0.002%
Verizon (Fixed Wireless)	20,247 (100Mbps+)	14.0%
T-Mobile (Fixed Wireless)	39,389 (100Mbps+)	27.2%
AT&T (Fixed Wireless)	10,168 (100Mbps+)	7.0%
Source: FCC Provider Broadband Data, June 2025 (latest available)		

- Locations served by more than one broadband provider: *100% including satellite; 36.4% excluding satellite*
- Funding secured for the canal bridges: *$2,415,000,000*

Schedule of Goals for the Next Year

Cape Cod Commission Year 3 Action Plan

This next year will be Year 3 of implementation of the 2024 Cape Cod CEDS. In Year 3 of implementation of the CEDS, the Cape Cod Commission will continue to advance:

- **Administration and General Planning:** Activities will include continuing to provide administrative support for the BCEDC, providing technical support related to CEDS objectives, and pursuing funding in support of CEDS Action Plan implementation. This year, this task will also include researching and reevaluating the BCEDC composition and operations to determine how the EDC can play a larger role in CEDS implementation.

- **Outreach and Information Sharing:** Outreach efforts to regional stakeholders will continue to include data collection, analysis, and visualization; the development and dissemination of research and planning reports; and presentations on a range of economic and community development issues.
- **Targeted Technical Assistance**: Commission staff will continue to offer assistance to towns, non-profits, and other regional partners, as well as support for LCP development, and project-based research and data analysis.

Following are new projects the Commission will initiate or advance over the coming year.

Invest in Water Quality and Wastewater Infrastructure

Construction Disruption Assistance: Commission staff will collaborate with the BCEDC, the Cape Cod and Islands Water Protection Fund Management Board, and other entities including the Cape Cod Chamber of Commerce and Cape municipalities, to develop recommendations for providing construction disruption assistance. While sewering is beneficial in the long-term for the region's environment and economy, the cost and disruption of sewer construction and connections can be particularly challenging for local businesses. Over the next year, the critical steps for this will include developing parameters for establishing best practices and programs, including identifying program administrators and funding.

Advancing Resilience

Tax Assessment: Commission staff will work with a consultant to understand the geographic location of tax assets of Cape Cod communities. This project will identify those areas that are particularly vulnerable to natural disasters and how such disasters or destruction of those properties could impact the region's tax base.

Understanding Insurance Risks: Commission staff will work with the BCEDC members and relevant stakeholders to commence a study researching the risks the region is facing regarding insurance, both for homeowners and businesses. As natural disasters become more prevalent and intense, the region is already seeing a spike in insurance premiums, as well as the loss of coverage from certain companies. This study will identify the existing risks, as well as anticipated future risks, regarding insurance and potential steps or mechanisms that can ameliorate or compensate for changes in or loss of insurance coverage.

Disaster Resiliency Planning: The region must not only prepare and plan for hazards before they happen, but also how it will recover and rebuild in their wake. Over Year 3 of CEDS implementation, this project will entail compiling baseline data to understand the current landscape of the region in terms of vulnerabilities, places better suited for retreating, reinforcing, or rebuilding, and opportunities for prioritizing resilience of infrastructure that provides critical services. Based on insights from the baseline data, a scope of work for developing a plan for the region will be defined.

Identify and Support Growing Industries in the Region

Analyze Industry Trends: The Cape Cod Commission and the Barnstable County Economic Development Council will work together to conduct an analysis to determine which industries in the region have been growing over the last 5-10 years, and which assets and opportunities exist on Cape Cod for new industries. The analysis will help provide guidance for anticipated staffing and business needs for new and innovative industries and their evolution.

The Commission will continue its ongoing work advancing the following CEDS actions.

Incentivize Year-Round Housing: Commission staff will continue to work with communities that wish to incentivize year-round housing by supporting towns in adopting the zoning required by the Seasonal Communities designation, which includes allowing year-round housing in certain situations.

Simplify Appropriate Housing Development: Commission staff will continue to work with local municipalities to develop and adopt new zoning that will allow for different types of housing through simpler permitting processes, including through encouraging adoption of pre-approved plans.

Invest in Water Quality and Wastewater Infrastructure: To ensure the Cape Cod and Islands Water Protection Fund continues to provide substantial subsidies to local water quality and wastewater projects, the Commission will continue to provide administrative and technical support to the Management Board. This will include maintaining an up-to-date understanding of anticipated local expenditures on wastewater projects across the region over the next five years. Commission staff will also work with the Management Board, regional, and state partners to encourage capitalization of the Clean Water State Revolving Fund.

Advocate for Replacement of the Canal Bridges: Commission staff will continue to participate in the Canal Bridges Advisory Group, provide updates and information to regional and local entities looking to engage in the Canal Bridges conversations, and maintain information on the consequences of inaction. The Commission will also initiate conversations about traffic management activities that may be needed to address any potential travel disruptions and impacts on business during construction activities.

Advancing Resilience – Adopting Floodplain Regulations: Commission staff will continue to work with municipalities, Barnstable County Cooperative Extension staff, and other partners to use model flood regulations to build support for and customize local regulations for local adoption to improve coastal resiliency.

Initiatives Anticipated to be Advanced by Other Organizations in Year 3

Provide Opportunities for Organizations and Entrepreneurs to Pilot Ideas

- **Community Development Partnership** continues to implement learning from the Northeast Transition Initiative (NETI) Fellowship to raise awareness and provide technical assistance around exit planning strategies for business owners, including worker-owned cooperatives. These trainings provide opportunities for new entrepreneurs as exiting business owners think about their options for selling their businesses. Additionally, the childcare pilot program will continue into the next fiscal year: depending on the outcomes, there may be further steps to pursue in the future.

- **Love Live Local** plans to launch an enhanced consumer search tool within the online directory, allowing shoppers to search by product or brand name to find locally owned sources, making it easier than ever to connect consumers directly with Cape Cod businesses. Additionally, Love Live Local will launch a Small Business Support Fund, expanding direct financial assistance to local entrepreneurs and addressing access to capital as a barrier to early-stage business growth.

Develop and Connect Students and Workforce to Educational and Training Opportunities

- The **Cape Cod Community College's** CCAPE program will continue to deepen its investment in healthcare workforce pathways, equity-centered access, and regional industry training. The College will sustain and expand its suite of healthcare programs—including CNA, Medical Interpreter, Community Health Worker, and Addiction Recovery Coach training—with CNA tuition continuing to be covered through the multi-year DESE contract and job placement outcomes actively tracked to demonstrate program impact. Across its CNA, Heat Pump Technician, and Marine Outboard Technician programs, CCAPE is committed to strengthening intentional access pathways for SNAP Path to Work participants and ESOL students, ensuring that training in these high-demand industries reaches underrepresented populations and connects the region's most vulnerable learners to sustainable career opportunities. Cape Cod Community College will continue the EEC Multilingual Contract cohort supporting early childhood educators, with renewals planned through FY28, and CCAPE will expand the ESOL Bridge to CNA and monthly language assessment process to ensure multilingual learners have clear, supported pathways into career training. Pending official award of a MassCEC implementation grant, CCAPE aims to open a dedicated Heat Pump Technician lab to directly address the confirmed regional shortage of qualified heat pump technicians and launch its first cohort of students in April 2027, while the Marine Outboard Technician Registered Apprenticeship Program is anticipated to launch its first cohort in January 2027. The convening of CCAPE's first Industry Advisory Board in September

2026—with dedicated working groups for CNA, Marine Technology, and HVAC alongside a main advisory group—will further strengthen employer-informed program development and ensure CCAPE's training offerings remain closely aligned with regional workforce needs.

- The **Cape Cod Chamber of Commerce** anticipates an additional two-year commitment of funds to continue the direct positive impact of the Cape Based CDL Training Program with an expanded impact on Nantucket in partnership with more trainers and the Nantucket Chamber of Commerce.
- **CapeTide** will run a 12-week program for up to 25 entrepreneurs in the Fall of 2026 and another 3-week intensive program in Spring 2027 for up to 15 entrepreneurs.
- The **Cape Cod Blue Economy Foundation** will take WaterWORKS to Martha's Vineyard High School in Fall 2026 for a pilot student WaterWORKS program. Traditional WaterWORKS will be held in January 2027 at Cape Cod Community College with capacity to host 400 high school students and 200 members of the public including additional businesses. Cape Cod Blue Economy Foundation will host another 4 WaveMakers Employer Forums.

Support Year-Round Community Activity and Civic Engagement

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

Advance Resilience

- **Cape Light Compact** will continue to administer their energy efficiency programs, including the Energy Saver Home Loan Program, which provides financing for qualified residents for energy efficiency upgrades.
- **Cape Cod Climate Change Collaborative** will bring regional leaders and area experts together around the three focus areas in a series of 9 workshops. Cape Cod Climate Change Collaborative will partner with Boston-based Climate Beacon to host a local Climate Summit for 150 – 250 attendees.