



# Meeting Agenda

**The Provincetown Select Board will hold a work session on Monday, September 30, 2019, at 5:00 p.m. in the Judge Welsh Room, Provincetown Town Hall, 260 Commercial Street, Provincetown, MA 02657.**

1. 5:00 pm Joint Meeting with the Harbor Committee and Provincetown Public Pier Corporation. Topics to include but are not limited to: (Votes May Occur)
  - a. Work session discussion on the organizational structure of the Harbormaster and Marine Services. Page 2
2. 6:30 pm Joint Meeting with Economic Development Committee. Topics to include but are not limited to:
  - a. Continued discussion on the Community Development Strategic Plan by Camoin Associates. Page 18

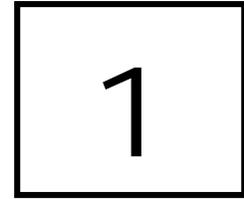
Posted by the Town Clerk: [www.provincetown-ma.gov](http://www.provincetown-ma.gov), 09/25/2019, 3:30 pm AR



Provincetown Select Board

**AGENDA ACTION REQUEST**

Monday, September 30, 2019



# JOINT MEETING

Harbor Committee and Provincetown Public Pier Corporation

Requested by: Select Board

Action sought: Discussion

Proposed Motion(s)

**Discussion Dependent/Votes May Occur**

## Additional Information

Work Session discussion on the organizational structure of the Harbormaster and Marine Services

Attachments include:

- Proposed Organization Chart of Harbor and Provincetown Public Pier Corporation
- Town Manager's Proposed Marine Coordinator job description
- Pier Corp's draft Marine Coordinator job description
- Pier Manager's job description
- Draft Harbormaster and Marine Services Agreement

*Note: As of the date of the packet the Harbor Committee had not yet met to review the proposed agenda and packet so more information may be forthcoming from them after their meeting on Sep 26.*

## Board Action

<i>Motion</i>	<i>Second</i>	<i>Yea</i>	<i>Nay</i>	<i>Abstain</i>	<i>Disposition</i>

# Memo

To: Select Board, Provincetown Public Pier Corporation and the Harbor Committee  
 From: Acting Town Manager  
 Date: September 25, 2019  
 Re: Joint Board Work Session discussion on the Organizational Structure of Harbormaster and Marine Services

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The purpose of this workshop is to have a discussion about the Town's organizational structure of how it provides critical harbormaster and marine department services. Our beaches, harbor and pier all have multiple overlapping jurisdictions within staff departments and town boards and it is incumbent on us to ensure that we thoughtfully consider a structure for management of these areas that respects the work of the many individuals as well as the policies and goals of each.

Staff suggests that we don't need to make any decision today, but that this workshop provides us an opportunity to collaboratively discuss our current organizational structure and determine how it can be expanded to incorporate all our shared goals.

## **Background**

In 2000, the Provincetown Public Pier Corporation ("PPPC") was created by special legislation, Chapter 13 of the Acts of 2000 (as amended by Chapter 260 of the Acts of 2002) (*The Act*). Under this special legislation, the PPPC was created as a separate legal entity from the Town, with the authority to essentially run and operate MacMillan Pier. The special legislation is clear that employees of the PPPC are not Town employees. In 2005 the Town and the PPPC entered into a 20-year Lease of MacMillan Pier.

*The Act* authorize the Pier Corporation to enter into contracts with the Town for the furnishing of services. In 2005, the Town and the PPPC entered into an Agreement for MacMillan Pier Marine Management Services ("Agreement"), which was for five years or until 2010. As noted by then-Town Manager Keith Bergman in a February 28, 2005 memorandum to the Select Board and the Pier Corporation,

*"[t]here appears to be near-universal recognition that two side-by-side redundant operations – the Town's marine department and the PPPC's pier manager – must be replaced with a single streamlined operation. ... The issue remaining is which entity should provide that streamlined operation – the Town or the PPPC. Since there is a Pier Corporation, and since it still has a statutory mission ... which needs to be fulfilled, that streamlined function should be provided by the Pier Corporation. This would be accomplished through a contractual arrangement between the PPPC and the Board of Selectmen and the Town Manager...."*

Notably, Mr. Bergman's memorandum identified that this combination of operations would "significantly expand" the scope of what the incumbent Pier Manager was hired to do. As a result, a hybrid position of "Harbor/Pier Manager" was born, which position would be cross-designated as the Town's Harbormaster.

The 2005 Agreement, was amended in 2009, the 2009 Agreement incorporated a provision that the Pier Corporation would provide the Town with "harbormaster and marine management services" in accordance with a defined scope of services. The July 1, 2009 Agreement was set to expire June 30, 2014, but was extended one additional year. In 2015, after several discussions about the potential to dissolve the Pier Corp, the parties executed an "Agreement for Provision of Harbormaster and other Marine-Related Services." Under that Agreement, dated June 15, 2015, the Town and Pier Corporation agreed that commencing July 1, 2015, the Pier Corporation would provide to the Town "harbormaster and marine management services" in accordance with a revised scope of services. This agreement was for a one-year term; which term would renew automatically for an additional one-year period if the parties did not take any additional actions to amend the term or cancel the Agreement. Within the 2015 agreement, was a provision that provided day-to-day supervision of the Harbormaster by the Town Manager. That agreement expired in June 2017, with little notice by either board. Since that time, the Town has continued to act "in the spirit" of the 2015 agreement.

### **Staff Organization at the PPPC**

In July 2019, the PPPC promoted the Facilities Manager to Pier Manager (job description provided) and in essence separated the responsibilities of the Harbormaster/Pier Manager into two positions, based on a near universal agreement that the former position had far too many responsibilities to be successful. An Acting Harbormaster was assigned and the former Harbormaster was reassigned to the newly created "Marine Coordinator" position (job description provided) based on a process that you are all aware of by now.

This has the effect of dividing the job responsibilities of the former harbormaster position into three separate and somewhat distinct areas, Pier Management, Harbormaster and Marine Department. The splitting of these positions will allow the PPPC the ability to focus on the critical maintenance and ongoing operations of the pier, which is critical at this point with the upcoming attenuation project. The new Marine Coordinator position will allow the town to pursue areas of critical concern with a focus that has been unavailable to us in the past. Including, dedicated support for the Harbor Committee, Chapter 91 compliance program, resiliency planning, emergency repose planning and management, shark and seal mitigation as well as other responsibilities detailed in the attached job description. All areas which the former harbormaster has a great deal of experience in doing.

Specifically allowing the Marine Coordinator to continue to work under the Harbormaster means that we will now have four (include office staff) full time staff members on the Pier and in the harbor year-round. Allowing the Marine Coordinator to continue to work in a similar role to the Deputy Harbormaster means that we continue to benefit from his years of experience and water skills, while ensuring that staff are available year round to maintain the pier and respond to emergencies. During the off season, the Marine Coordinator can focus on the Marine Department planning and implementation, and be available to the Harbormaster to assist in storms and emergencies in the off-season when we rely solely on On-Call personnel. During the peak season, the individual will be available to meet peak demands on the pier while not supporting the Harbor Committee and Marine Department initiatives.

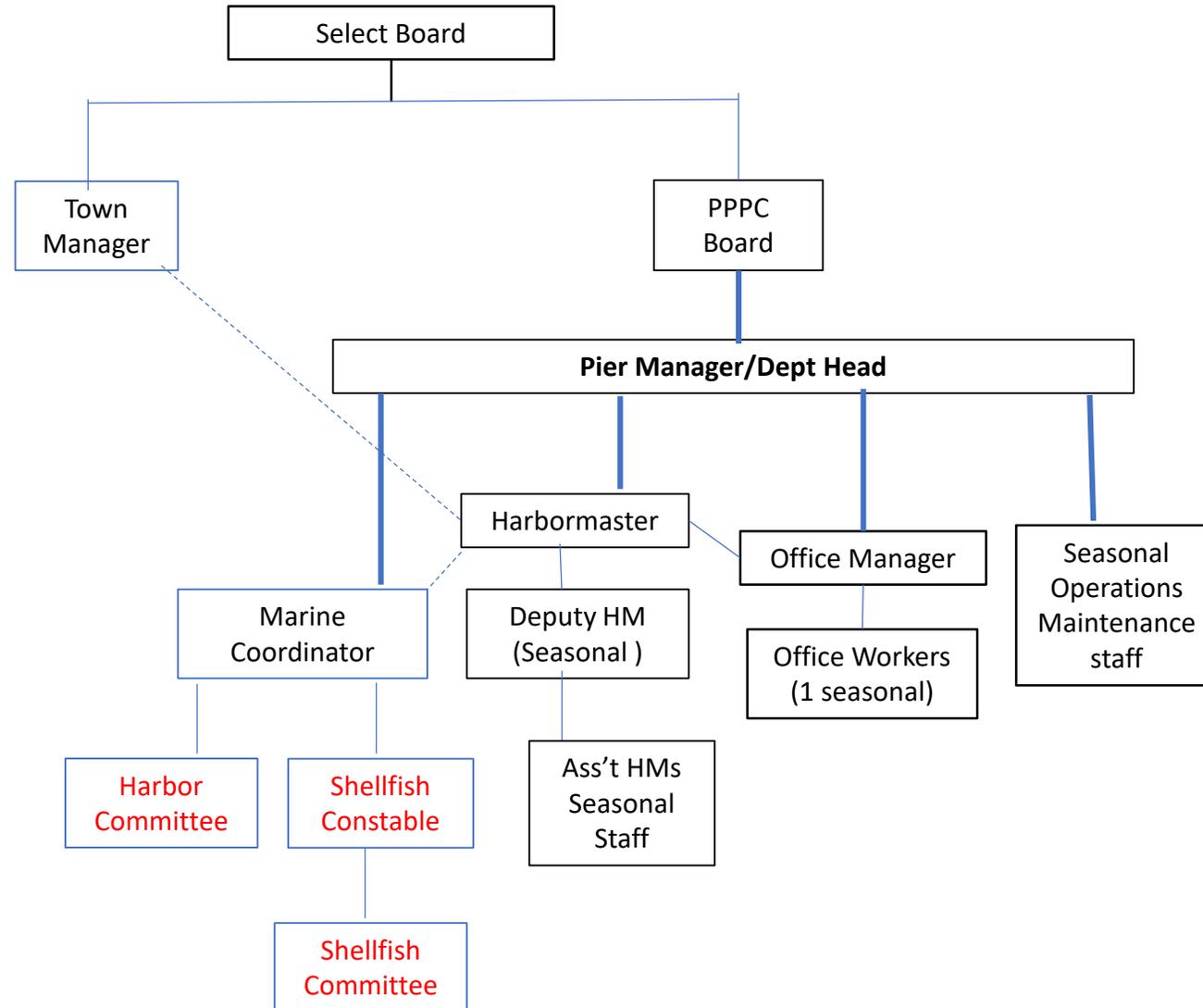
## **Budgeting and Organization**

The PPPC and the Town have been having a discussion about the difference between the 295 Budget and the actual cost for providing harbormaster services for the last several years. Everyone has agreed that the 295 Budget did not cover the full cost of the service, but requested that the PPPC spend time to analyze the time spent between the two functions and provide a more detailed breakdown. When the boards met in January 2019 during the budget discussion the delta between the two was projected at upwards of \$50,000. To be frank, these personnel changes will widen that gap even further. The two boards need to come to a common understanding of those costs and fully fund the 295 budget to accommodate that service.

The logic of having one entity manage the overall functions of the harbor and pier still exists. This proposed organization structure will ensure that duties, responsibilities and initiatives of the Harbor Committee and the Town are addressed at an equal priority to the pier needs and public safety in the harbor. Having all three entities staffed and working together make sense for Provincetown and the pursuit our common goals.

The Board should continue to evaluate the benefits of a harbormaster and marine services agreement with the PPPC, under the new structure that allows for sufficient prioritization of Harbor Committee and Marine Department functions. We should continue to discuss the day to day management and supervisory concerns between the various boards and the town manager and ensure that they are properly address within the agreement. I recommend that the hiring and firing authority for the Harbormaster and Marine Coordinator continue to rest with the Town Manager with day to day supervision under the Pier Manager, and lateral supervision, consultation and policy direction from the Town Manager. The issue of how to handle future conflicts and organizational struggles can be worked out over time. Nothing within the proposed arrangement is permanent and can be adjusted as needed as long as the three boards continue to communicate and work cooperatively towards our common goals. The weekly meetings between the PPPC leadership and Town Manager provide the opportunity for us to maintain that relationship and proactively address concerns as they arise.

PPPC Organizational Chart



## **AS PROPOSED BY THE TOWN MANAGER**

### **MARINE COORDINATOR**

#### **Definition:**

Supervisory, administrative, in directing the Marine Department and support of the Harbormaster's Office in management of the town harbor, shellfish areas, town landings, and boat ramps; in assisting boaters and the general public; and in the enforcement of applicable local regulations, bylaws, and Massachusetts General Laws; all other related work as required.

#### **Supervision:**

Works under the policy direction of the Town Manager in accordance with applicable provisions of the Massachusetts General Laws and state regulations. Direct Supervision from the Harbormaster.

Performs professional harbor and shellfish management duties of a complex and responsible nature which require considerable judgment, planning, and initiative in managing the Town's Harbor area, in enforcing bylaws and other regulations, in responding to emergencies, and in assisting the Town Manager to plan, administer and coordinate the activities of the Harbor and the waterfront. Supports the Harbormaster in a Deputy Harbormaster role when not engaged in Marine Department activities.

Supervises the Shellfish Constable.

#### **Job Environment:**

Work is generally performed either in an office environment or under outdoor conditions or in or around a boat, with exposure to the noise and fumes associated with proximity to commercial fishing operations; functions often involve exposure to variable weather conditions, depending on assigned duties.

Operates a boat and related equipment; operates standard office equipment.

Has frequent contacts with other town departments, the Coast Guard, local, state, and federal agencies, and the general public to explain and enforce regulations, and to respond to inquiries concerning the harbor, and shellfish areas.

Has access to department related confidential information such as personnel records, bid proposals, negotiating positions, and criminal investigations.

Errors could result in substantial damage to town property, boats and equipment, monetary loss, personal injury, danger to public health and safety, danger to the environment, and contamination of the local shellfish population.

## **Essential Functions:**

Under the direction of the Town Manager, plans, programs, and implements Marine Department policies, as set by the Harbor Committee and Select Board; works with related town departments and agencies in the development and implementation of management plans for the marine department; attends meetings of the Harbor Committee and Shellfish Committee, and assists those and other town boards with the planning and programming of Marine Department policies.

Manage the Chapter 91 Compliance Program, including maintaining the database, conduct random compliance inspections, coordinate with DEP on Chapter 91 applications and well as non-compliance and enforcement actions, monitor Harbor Access Gift Fund collection, conduct education and guidance to staff and local residents on the Chapter Program.

Works collaboratively with Environmental Planner to assist with coastal resiliency planning and implementation, municipal vulnerability grant planning and implementation, beach nourishment planning and implementation, as well as beach clean-up and water quality programs and initiatives.

Works collaboratively with the Health Department to coordinate the water quality testing program with Barnstable County in compliance with Massachusetts Bathing Beach Regulations 105 CMR 445.000.

Manages the County Dredge Program.

Works collaboratively with the Emergency Manager to coordinate the Town's emergency management response; including natural disaster preparation and response, as well as manage the Town's shark and seal mitigation and response plan.

Supervise the Shellfish Coordinator to develop, promote and manage shellfisheries in Provincetown; make or cause to be made such studies as may be necessary to enhance the value of such shellfisheries and shall enforce all statutes, ordinances, by-laws, rules & regulations relative to shellfish in Provincetown.

Work collaboratively with local and regional partners to develop and promote the Provincetown Blue Economy and promote economic development opportunities that encourage sustainable use of our harbor and beach resources for economic growth, improved livelihoods and jobs while preserving the health of the ecosystem.

Under the direction of the Harbormaster, the marine coordinator may be tasked

with emergency response on the water and or other deputy harbormaster functions. Including operations on the town pier and harbor; enforces Coast Guard boating rules and safety regulations and applicable Massachusetts General Laws;

Performs other similar or related duties as required or as situation dictates.

**Recommended Minimum Qualifications:**

**Education and Experience:**

Associate's degree with coursework in law enforcement, maritime studies, or related areas; four to five years of progressively responsible experience in boating and waterways operations, boat handling and rescue training, law enforcement, harbor management, and mooring regulation; or any equivalent combination of education and training.

**Knowledge, Ability and Skill:**

Comprehensive knowledge of waterway operations, shellfish management, boat handling, rescue operations, and harbor management. Thorough knowledge of federal and state laws and regulations, town bylaws and regulations, and town waters, tidal conditions and currents. Familiarity with preparation of contract documents. Familiarity with harbor planning and engineering specifications.

Ability to work cooperatively with others. Ability to maintain harmonious relations with federal, state, and local enforcement agencies and the general public. Ability to prepare and manage budgets. Ability to operate small boats. Ability to direct emergency rescue efforts.

CPR and First Aid Certification required.

Possession of a Massachusetts Class D motor vehicle operator's license required.

**Physical Requirements:**

Frequent moderate physical effort required when performing most duties, with occasional heavy physical effort required when performing duties under field conditions; position may require incumbent to stand or walk for a large portion of shift; must be able to access a variety of boats and vessels.

**Marine Coordinator Job Description:**

The role of marine coordinator is to ensure coordination and collaboration with multiple town departments to achieve town wide goals related to the shore and certain aspects of the harbor. Primary functions include implementing chapter 91 compliance strategy and other goals of the MHP, providing staff support to the Harbor Committee, working with DPW on beach nourishment and town landings, and continuing to improve beach and water quality to enhance culture and tourism (harbor loops, beach cleanup etc.) The marine coordinator will also be part of the emergency management team and work with other designated staff on coastal resiliency.

On an as needed basis, directed by the Harbormaster, the marine coordinator may be tasked with emergency response on the water and or other deputy harbormaster functions.

**Marine Coordinator Tasks:** Work to be performed under the supervision of Pier Manager and Town Manager:

- Provide staff support to Harbor Committee
- Create implementation plan for MHP with Harbor Committee
- Implement Chapter 91 Compliance strategy
  - Maintain Chapter 91 Database and map with IT staff
  - Conduct random compliance inspections of Chapter 91 properties- to assure that all license conditions are met
  - Coordinate Non-Compliance matters with DEP
  - Following-up on non-compliant properties
  - Provide support and guidance to Harbor Committee on all Chapter 91 applications
  - Provide leadership in implementation of the Harbor Plan
  - Provide compliance assistance to properties that are not in compliance
  - Assist all boards and departments with questions on Chapter 91 jurisdictional questions ( Building Commissioner, Planner, Conservation Commission etc.)
  - Ensure that Harbor Access Gift Fund monies are collected in a timely manner
  - Coordinate with DEP on potential enforcement actions by DEP
  - Coordinate public access improvements on town landings and town properties
  - Conduct educational meetings with property owners and interested parties
  - Submission of Chapter 91 applications on behalf of the Town
- Implement Water Quality goals of MHP
- Implement goals of MHP goals of Beaches and Town Landings including beach nourishment
- Implement goals of MHP related to Culture and Tourism
- Work with emergency management team in Town
- Liaise with Center for Coastal Studies
- Assist with coastal resiliency planning and implementation
- Assist Environmental Planner
- Manage/Assist Volunteer Projects related to beach cleanup etc.
- Pursue Grant Funds to Further Goals
- Continue work on shark and seal mitigation strategy and public awareness
- Represent Provincetown at County Dredge meetings
- Attend other regional meetings related to the scope outlined above
- Provide emergency response and other deputy harbormaster functions as directed by Harbormaster on an as needed basis

## PROVIDED BY THE PROVINCETOWN PUBLIC PIER CORPORATION

### **Duties and Responsibilities of the Pier Manager/Department Head**

#### **Role and Responsibilities**

MacMillan Pier is a 1000 ft long commercial wharf of modern construction which supports a heavy vehicle roadway and pedestrian walkways along its entire length. Infrastructure of the pier includes fixed and floating docks, buildings and public facilities, off-loading facilities, and ice plant, plumbing and electrical infrastructure to support tenant operations, and public passenger embarkation / disembarkation facilities.

The Pier Manager oversees the Facilities maintenance, repair, renovation and new construction of the physical assets and related infrastructure of the pier. The PM works with the PPPC's engineering consultants on annual facility assessments that are used to develop long-range maintenance and capital improvement programs. The PM will identify, plan, budget and execute specific maintenance projects to ensure safe and efficient operation of pier facilities, and optimization of long term asset value, to include Capital Improvement Project Forecasting.

The PM/DH is supervised by the Chairman of the PPPC.

The PM/DH will develop and maintain relationships with various professional trades and outside contractors /equipment suppliers and will schedule, coordinate and supervise day-to-day maintenance activities outside contractors and Pier Corp maintenance staff. In addition to the Pier Manager's managerial responsibilities for pre-planned maintenance activity, the position requires sufficient budget planning, monitoring and forecasting.

The Pier Manager/Department Head will also supervise over the Harbormaster, the Marine Coordinator and the Office Manager positions.

#### **Additional responsibilities:**

- Business Management
- Dock Allocation
- Tenant Relationships- To include lease negotiations and renewals, as well tenant communication and updates.
- Pier Operations Management- To include daily, monthly and yearly revenue.
- Construction Management- which includes all new construction projects particularly the Wave attenuator and Floating dock reconstruction Project
- All Pier Permitting processes and submittals to the Army Corps of Engineers
- Procurement/contracting
- Working with Town of Provincetown personnel and attending weekly Staff meetings.

**AS PROPOSED BY THE PROVINCETOWN PUBLIC PIER CORPORATION**

**Agreement Between Provincetown Public Pier Corp and Town of Provincetown for Harbormaster and Marine Coordinator Services**

This agreement is made and entered into as of the \_\_\_\_\_, by and between the Town of Provincetown (hereinafter referred to as the "Town"), acting by and through its Board of Selectmen and Town Manager, and the Provincetown Public Pier Corporation (hereinafter referred to as "Pier Corporation"), acting by and through its Board of Directors.

WHEREAS, the Pier Corporation is a public entity established in accordance with Chapter 13 of the Acts of 2000, as amended by Chapter 260 of the Acts of 2002, for the purpose of, among other things, managing MacMillan Pier, and

WHEREAS, sections 5(d) and 5(n) of Chapter 13 of the Acts of 2000 authorize the Pier Corporation to enter into contracts with the Town for the furnishing of services; and

WHEREAS, the Town desires to contract with the Pier Corporation for the provisions of harbormaster services and marine coordinator functions; and

WHEREAS, the Town and the Pier Corporation have determined that there are real cost savings to be derived from operational synergies between the Pier Corporation's pier management operations, the functions of the Town's Marine coordinator and harbormaster services that will benefit both parties should these activities be managed by a single entity;

NOW, THEREFORE, the Town and the Pier Corporation agree as follows:

1. Scope of Services. Commencing on \_\_\_\_\_, the Pier Corporation agrees to provide the harbormaster **and marine coordinator** services to the town in accordance with the scope of services set forth in Attachment A and **Attachment B**.
2. Term. This Agreement shall be for a term of one year unless otherwise terminated by the parties. The Agreement shall be automatically extended for an additional one year period unless actions are taken by either of the Parties to amend the terms or cancel the agreement.
3. Compensation. The Town agrees to pay the Pier Corporation the amount appropriated to fund the 295 (Harbormaster **and marine services**) **budget** each year for the services provided herein. The compensation amount may be adjusted from year to year based on changes in the average cost of operations of other Town departments, the Town's annual appropriation process, and by any mutually agreed changes to the scope of services and/or staffing levels of the Harbormaster's Office **and marine coordinator functions** as outlined in attachments hereto. **The 295 budget will cover both Harbormaster services as defined in Attachment A and Marine Coordinator Services defined in Attachment B. See attachment C.**

Payment of the annual compensation amount shall be made on a monthly basis in equal installments. The obligation of the Town under this Agreement shall be subject to annual appropriation. In the event that sufficient funds are not appropriated or otherwise made available to support the continuation of this Agreement in any fiscal year, the Town shall cancel this Agreement.

4. Duties of the Harbormaster. The duties of the Harbormaster and of the staff of the Harbormaster Office staff are outlined in Appendix A of this agreement. The day-to-day supervision of the Harbormaster in the performance of these duties shall be the responsibility of the Pier Manager.

5. Duties of the Marine Coordinator. The duties of the Marine Coordinator are outlined in Appendix B of this agreement. The day to day supervision of the Marine Coordinator in the performance of these duties shall be the responsibility of the Pier Manager and Town Manager.

6. Appointment and Replacement of the Harbormaster. Consistent with General Laws c. 102, sec. 19, the appointment of the current Harbormaster shall remain in force unless the Town Manager in consultation with the pier manager determines that the Harbormaster should be relieved of his/her duties for neglect of duty, negligence or conduct unbecoming a harbormaster, or until this Agreement is terminated or otherwise amended. When and if the position of Harbormaster becomes vacant, the Pier Corporation shall solicit candidates for the position pursuant to General By-law 6-2 (Employment) and in accordance with Pier Corporation Personnel Policy Chapter 3, Articles 1 and 2. The Pier Corporation board shall nominate one or more candidates who is/are qualified to serve as the Town Harbormaster. The Town Manager may approve or reject any of the persons nominated. If the nomination is approved, the Town Manager shall designate the person as the Town's Harbormaster pursuant to General Laws c.102, §19 and Provincetown Charter §7-2-4. If the nomination is rejected, the Pier Corporation shall provide a suitable replacement that is acceptable to the Town Manager. If no suitable replacement can be found, this agreement will terminate. The appointment and replacement of the Marine Coordinator will be at the discretion of the Town Manager in conjunction with the Harbor Committee and Pier Corp chairmen.

7. Harbormaster Office Department Staff. The staff of the Harbormaster's Office shall be employees of the Pier Corporation and shall serve under the direction and supervision of the Harbormaster. Personnel employed by Pier Corporation and working under the terms of this agreement shall be designated as Special Municipal Employees and shall be allowed to participate in the Town's employment benefit programs under the same terms and conditions of other town employees. The salary and employment benefits of the Harbormaster and staff of the Harbormaster's Office shall be determined and paid for by the Pier Corporation. Conflicts regarding tasking, scheduling and/or deployment of the staff of the Harbormaster's Office shall be resolved by the Pier manager. Salary and employment benefits of the Marine Coordinator shall be determined by the Town Manager and paid for by the Pier Corp using funds appropriated by the town in the 295 budget, see attachment C.

8. Communications and Accountability. The Chair of Pier Corporation shall be accountable to the Board of Selectmen for the overall performance of all Pier Corporation employees working under this Agreement. The Pier Corporation shall meet with the Board of Selectmen for a performance review in November of each year. The agenda of this joint meeting will be Pier Corporation's report on the management of the Marine Department, Pier and Harbormaster services for the prior year and plans for the coming year. At this meeting, the Pier Manager will provide a budget request for the Harbormaster services and Marine Coordinator (the 295 Budget) for the Town's next fiscal year and an updated list of all Town and Pier Corp assets in operation with a value over \$5,000 (i.e. vehicles, vessels, or equipment).

9. Termination. This Agreement may be terminated by either party for convenience after ninety (90) days written notice.

10. Successor and Assigns. This Agreement is binding upon the parties hereto, their successors, assigns and legal representatives. Neither the Town nor the Pier Corporation shall assign or transfer any interest in the Agreement without the written consent of the other.

11. Compliance with Laws. The Pier Corporation shall comply with all Federal, State and local laws, rules, regulations and orders applicable to the work provided pursuant to this Agreement, such provisions being incorporated herein by reference. The Pier Corporation shall be responsible for obtaining all necessary licenses, permits, and approvals required for the performance of such work.

12. Severability. If any term or condition of this Agreement or any application thereof shall to any extent be held invalid, illegal or unenforceable by the court of competent jurisdiction, the validity, legality, and enforceability of the remaining terms and conditions of this Agreement shall not be deemed affected thereby unless one or both parties would be substantially or materially prejudiced.

13. Governing Law. This Agreement shall be governed by, construed and enforced in accordance with the laws of the Commonwealth of Massachusetts.

14. Entire Agreement. This Agreement, including all documents incorporated herein by reference, constitutes the entire integrated agreement between the parties with respect to the matters described.

This Agreement supersedes all prior agreements, negotiations and representations, either written or oral, and it shall not be modified or amended except by a written document executed by the parties hereto.

IN WITNESS WHEREOF, the parties hereto have caused this Agreement to be executed on the day and year first above written.

**ATTACHMENT A:  
Duties and Responsibilities of the Harbormaster**

The Harbormaster. Performs tasks outlined in Massachusetts statutes (Chapters 90b, 91, 102 and elsewhere in the Acts of the Legislature) regarding duties and authorities of harbormasters:

- Maintains buoys and channels, directs vessel traffic, lightering, loading and berthing within the Harbor
- Supervises seasonal, assistant and deputy harbormasters
- Enforces the Town's Harbor Regulations
- Enforces Federal, State and Local Environmental Regulations
- Coordinates harbor operations and emergency response with other Law Enforcement agencies and the U.S. Coast Guard
- Educates public on boating safety and environmental issues
- Provides operational support and supervisory assistance to the Shellfish Constable, as required
- Pursues grants funding in support of Town objectives for the harbor and the water space under the jurisdiction of the Town
- Ensures staff are current in all required professional development training and qualifications
- Assists in planning and coordinating joint operational training with Coast Guard Station Provincetown, and the Town's Police and Fire Departments
- Develops budgets and financial reports related to harbor management as required by the Town Manager
- Manages Harbormaster Office, and directs and supervises staff in performance of the functions outlined below
- Provides harbor-related inputs to the Town's CIP Program prior to the Selectmen's annual CIP reviews in September (e.g. replacement of a patrol vessel with upgrades for CBRNE detection, fire-fighting, and search & rescue/mass casualty support capabilities.
- Provides support in the implementation of Harbor Plan Goals
  - Commercial Fishing
  - Recreational Fishing
  - Navigation and Dredging
  - Recreational Boating
  - Moorings and Anchorage

**ATTACHMENT B:  
Duties of Marine Coordinator**

- Work to be performed under the supervision of Pier Manager and Town Manager:
- Create plan for meeting certain goals and objectives of MHP
- Liaison to Harbor Committee
  - Maintain Chapter 91 Database and map with IT staff
  - Conduct random compliance inspections of Chapter 91 properties- to assure that all license conditions are met
  - Coordinate Non-Compliance matters with DEP
  - Following-up on non-compliant properties
  - Provide support and guidance to Harbor Committee on all Chapter 91 applications
  - Provide leadership in implementation of the Harbor Plan
  - Provide compliance assistance to properties that are not in compliance
  - Assist all boards and departments with questions on Chapter 91 jurisdictional questions ( Building Commissioner, Planner, Conservation Commission etc.)
  - Ensure that Harbor Access Gift Fund monies are collected in a timely manner
  - Coordinate with DEP on potential enforcement actions by DEP
  - Coordinate public access improvements on town landings and town properties
  - Conduct educational meetings with property owners and interested parties
  - Submission of Chapter 91 applications on behalf of the Town
  - Implement Water Quality goals of MHP
  - Implement goals of MHP goals of Beaches and Town Landings including beach nourishment
  - Implement goals of MHP related to Culture and Tourism
- Work with emergency management team in Town
- Liaise with Center for Coastal Studies
- Assist with coastal resiliency planning and implementation
- Assist Environmental Planner
- Manage/Assist Volunteer Projects related to beach cleanup etc.
- Pursue Grant Funds to Further Goals
- Continue work on shark and seal mitigation strategy and public awareness
- County Dredge representative
- Attend other regional meetings related to the scope outlined above
- Provide emergency response and other deputy harbormaster functions as directed by Harbormaster on an as needed basis

**ATTACHMENT C:  
Funding Considerations for 295 budget (Harbormaster services and Marine Coordinator)**

The PPPC has been covering a shortfall in the budget allocated for HM services for a number of years. Most recently, in the FY20 budget, the deficit is approximately \$52k. As the function of HM has been separated from marine coordinator duties, we recommend the following:

The position of Harbormaster shall be Grade 6 Step 1 for the remainder of FY20 - \$55,182.82. We believe that by separating the PM and MC responsibilities from the HM position, a salary reduction is warranted. This step and grade is consistent with other town positions including health agent, conservation agent and local building inspector among others. Funds for this position will come from sources presently drawn from for the HM position. The same is true for the part-time seasonal harbormasters and harbormaster operating budget. The total budget for HM services will remain \$204,907 as we have additional salary associated with the transition to Acting Harbormaster.

The position of marine coordinator shall be Grade 4 step 6 for the remainder of FY20 - \$52,707.70. We believe this is consistent with other town positions including permit coordinator and licensing agent, among others. As the primary duties of the position relate to the implementation of the MHP including Chapter 91 compliance, the funds for this position could be drawn from the following:

Harbor Access Gift Fund: 80%  
Coastal Resiliency and Emergency Management grants: 15%  
Harbormaster services budget: 5%

There will be expenses associated with the Marine Coordinator position as well, we estimate these to be about \$7,500. This will be a line item in the budget and could be partially offset by applicant fees. This "B-budget" could be drawn from the Harbor Access Gift fund.

In terms of office/administrative assistance for the MC position, these will be the responsibility of the town and not PPPC employees.



Provincetown Board of Selectmen

**AGENDA ACTION REQUEST**

Monday, September 30, 2019

2

# Economic Development Strategic Plan Action Plan for the Town of Provincetown

Requested by: Select Board

Action Sought: discussion

## Proposed Motion(s)

Discussion dependent

## Additional Information

- Continued from July 22, 2019 – Focusing on Action Plan Matrix provided in the Community Development Action Plan for the Town of Provincetown report.
- Attached memorandum and materials.
  - Community Development Action Plan for the Town of Provincetown (online packet only) Page 12
  - Town of Provincetown Housing Strategies (online packet only) Page Page 77
  - Data Summary and Analysis (online packet only) Page 105
  - Community Survey Responses (online packet only) Page 94
  - Economic Development Strategic Plan Tracking 9/23/19 (printed) Page 128

## Board Action

<i>Motion</i>	<i>Second</i>	<i>Yea</i>	<i>Nay</i>	<i>Abstain</i>	<i>Disposition</i>

# Memo

To: Select Board  
From: Michelle Jarusiewicz, Community Housing Specialist  
Date: July 15, 2019  
Re: Economic Development Strategic Plan

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**June 2018:** In support of the Town Wide Economic Development Goal, we retained the economic development consulting firm Camoin Associates, recommended by MassDevelopment, to assist the Town of Provincetown with economic planning. Camoin Associates is well versed in the unique nature of New England coastal communities. The budget for this project was \$40,000.00. This project was conducted in three phases: 1) Baseline Assessment, 2) Competitive Positioning, and 3) Strategy Development.

**October 10-11, 2018:** The first phase began with their review of prior plans and the start of a capacity assessment, beginning with the kickoff event focusing on initial input from town staff, officials and committee members as well as key stakeholders. Camoin Associates summarized the themes and issues that rose to the top, the themes were: Blue Economy, Tourism/Conference Center, Housing, Education, Arts and Culture, and Finance.

**November 28- 29, 2018:** Included broader community outreach as well as the presentation of an opportunities and challenges assessment.

**Spring 2019:** The final phase, Strategy Development, based on the input of the earlier sessions and research, culminated with Community Development Strategic Plan and added a Housing Strategies component.

**April 17, 2019:** Setting the Stage for a Sustainable Economy, Public Forum at Town Hall, expanding the Blue Economy, celebrating and supporting arts and culture, and increasing access to housing options are at the top of the list for the Provincetown community development strategy to pursue a year-round and sustainable economy for all. After months of research, information gathering, interviews, focus groups, and public meetings, Camoin Associates presented their draft recommendations at a community forum. Initial goals identified by the team include:

- Build and support entrepreneurship in the Blue Economy.
- Blend Provincetown's tourism, education, culture, and arts assets using entrepreneurial approaches.
- Expand housing options through innovative programs and land use policies.
- Address critical town issues through inclusive consensus building and innovative financing models.

While the goals are geared towards different issues, they have been framed in a way that showcases Provincetown's desire to be entrepreneurial, leverage the unique community character, and create sustainable prosperity for all. The intent of this strategy is not to address every single issue related to economic development, but rather to focus on strategic opportunities that have the best chance of implementation and will result in advancement towards achieving the community's goals.

*Documents prepared by Camoin Associates:*

Presentation

Community Development Action Plan for the Town of Provincetown, July 2019

Housing Strategies

Community Survey Responses

Data Summary and Analysis

Economic Development Strategic Plan

# Town of Provincetown

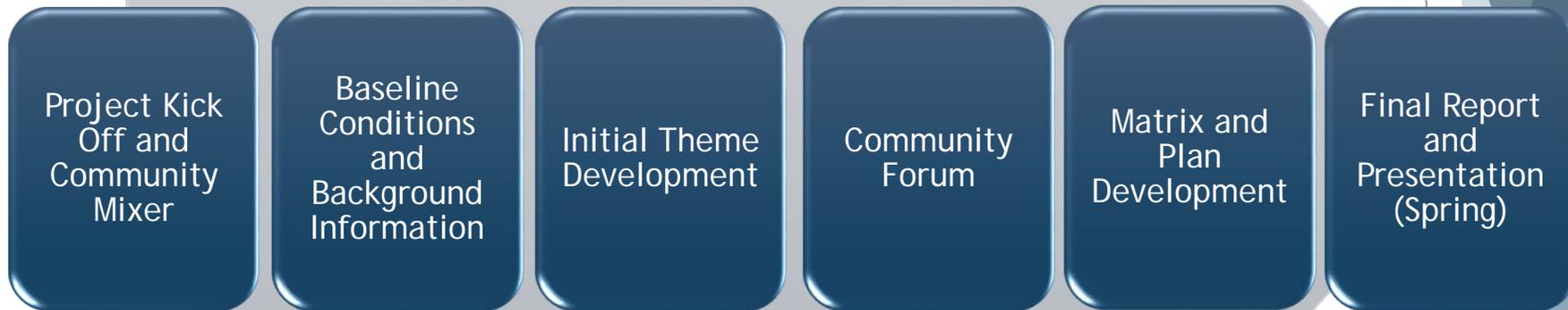
## Community Development Strategic Plan

Rachel Selsky, AICP



Presented on: July 22, 2019

# Project Overview



# Early Themes

## Blue Economy

- Water dependent and enhanced uses
- Opportunities to expand and capitalize on assets

## Housing

- High cost, limited supply
- Impact on workforce and economic development

## Education, Learning, and R&D Destination

- Use existing assets to attract educational uses
- Arts, hospitality, marine, coastal studies, others

## Arts and Culture

- Historical and current driver of tourism, part of reputation
- Arts incubator space and need for additional services

## Tourism and Conference Center

- Opportunities to extend the season
- Additional event space

# Action Plan

- Hired to assist with creation of a strategy that moved Provincetown towards an economy with a strong season and longer shoulder season - increasingly year-round.
- Recognize many different economic sectors and issues at play - positive and negative.
- Goals are framed around:
  - Entrepreneurship and spirit
  - Leverage unique community character
  - Create sustainable prosperity for all
- Not designed to address every single issue but focus on strategic opportunities to achieve community's goal.

# Goal Areas

**Goal 1: Build and support entrepreneurship in Provincetown's Blue Economy.**

- Significant economic driver
- Entrepreneurs will diversify the economy and protect the natural environment.
- Create spin off opportunities

**Goal 2: Promote collaboration among Provincetown's tourism, education, culture, arts, and recreation assets.**

- Expand the visitor market
- Focus on supporting artists and their ability to be financially sustainable

# Goal Areas

**Goal 3: Expand the housing options in Provincetown through innovative programs and land use policies.**

- Housing is a severe constraint
- Require a strategic and targeted approach
- Additional research needed

**Goal 4: Address Provincetown's critical issues through inclusive consensus building and new financing models.**

- Create a vision for the waterfront
- Improve community consensus about the future

**Goal 5: Align infrastructure investments to community goals.**

- Expand public transportation options
- Increase water and sewer capacity

# Priority Actions

1. Charge the **Economic Development Committee** with bi-annual review of this plan and **implementation**.
2. Establish appropriate training programs, business services, and investment in **support of the aquaculture industry**. Expand grant programs, work with industry leaders, and identify areas of need.
3. Create a **substantial public awareness** campaign for all property owners on assistance related to **increasing the housing supply**.
4. Continue with **community engagement** efforts including for **housing development**.
5. Update the **Housing Playbook** to provide an accurate reflection of the housing priorities that have been implemented.
6. Continue and expand on **collaboration between existing housing and other groups** both in town and the region.



Rachel Selsky, AICP

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# Community Development Action Plan for the Town of Provincetown

July 2019

Prepared for:

Town of Provincetown  
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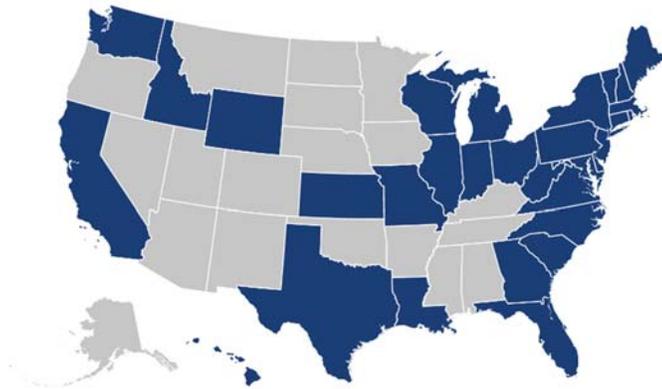
## About Camoin 310

Camoin 310 has provided economic development consulting services to municipalities, economic development agencies, and private enterprises since 1999. We specialize in real estate market analysis to evaluate the feasibility and impacts of proposed projects. Through the services offered, Camoin 310 has had the opportunity to serve EDOs and local and state governments from Maine to California; corporations and organizations that include Lowes Home Improvement, FedEx, Volvo (Nova Bus) and the New York Islanders; as well as private developers proposing projects in excess of \$600 million. Our reputation for detailed, place-specific, and accurate analysis has led to projects in thirty states and garnered attention from national media outlets including *Marketplace* (NPR), *Forbes* magazine, and *The Wall Street Journal*. Additionally, our marketing strategies have helped our clients gain both national and local media coverage for their projects in order to build public support and leverage additional funding. The firm currently has offices in Saratoga Springs, NY, Portland, ME, Boston, MA, and Brattleboro, VT. To learn more about our experience and projects in all of our service lines, please visit our website at [www.camoinassociates.com](http://www.camoinassociates.com). You can also find us on Twitter [@camoinassociate](https://twitter.com/camoinassociate) and on [Facebook](https://www.facebook.com/camoinassociates).

## The Project Team

Jim Damicis  
*Project Principal*

Rachel Selsky  
*Senior Project Manager*



## Executive Summary

With its unique beauty, arts, beaches, inclusivity, entertainment, entrepreneurship, and history – the Town of Provincetown is a particularly special place for many residents and visitors. With community recognition that the time is right to find ways to create a more sustainable economy, Provincetown undertook a community and economic development strategic planning process to identify catalyst projects and build momentum for change. The goal of this community and economic development planning process is to address the severe challenges that businesses and residents face like the housing shortage, limited workforce, transportation issues, and infrastructure challenges, while at the same time respecting the community's values and principals.

The planning process included economic data analysis, interviews and focus groups, public meetings, and best practices research, all of which is summarized below with more detail included as attachments. The information collection portion of the planning process found that there were several themes that rose to the top as key to economic development, including:

- The current **housing situation is putting extreme pressure on the business and resident community** as rental units are converted to condominiums and short-term rentals. With a lack of accessible housing for workers, businesses are struggling to find enough workers and are resorting to buying and operating their own housing, which is can be financially daunting for a new business. The high cost of housing has driven the workforce further and further away from Provincetown and limited transportation options have created a scenario where businesses struggle to remain open. The Town is working to address this issue, but it remains a critical factor when considering any kind of economic and community development project.
- Creating a **more vibrant shoulder season economy will result in a more sustainable economy** that can support families and a more financially diverse population. It will also make it a more attractive place to live year-round for people who may have connections to Provincetown but are unwilling to live in the highly seasonal environment that currently exists.
- **Provincetown has a significant number of assets that can built upon to support economic sustainability**, including the long history of arts and culture, unmatched marine resources, national recognition as a tourism destination, and opportunities related to education and R&D. Expansion on these assets will not be possible without more housing opportunities.
- **Permitting, regulations, and infrastructure constraints limit economic development potential.** Regulations and growth management techniques are necessary to protect the natural resources of the outer Cape but can be challenging to getting projects and developments completed in a timely and financially efficient manner. Infrastructure challenges are also limiting economic development potential, including transportation, water/sewer, and telecommunications.

The economic development action plan recognizes that there are many different economic sectors and issues at play in Provincetown that are driving or constraining the community's ability to achieve the goals of a more sustainable year-round economy. While the goals are geared towards the different issues, they have been framed in a way that showcases Provincetown's desire to be entrepreneurial, leverage the unique community character, and create sustainable prosperity for all. The intent of this strategy is not to address every single issue related to economic development, but rather to focus on strategic opportunities that have the best chance of implementation and will result in advancement towards achieving the community's goals.

## Main Goal Areas

The five-overarching goals identified through this planning process include:

- Goal 1: Build and support entrepreneurship in Provincetown's Blue Economy.
- Goal 2: Promote collaboration among Provincetown's tourism, education, culture, arts, and recreation assets.
- Goal 3: Expand the housing options in Provincetown through innovative programs and land use policies.
- Goal 4: Address Provincetown's critical issues through inclusive consensus building and new financing models.
- Goal 5: Align infrastructure investments to community goals.

## Priority First Steps

While all the strategies are important and have been included for a reason, the following should be implemented as soon as possible as they will have the greatest impact and result in momentum for the overall effort.

- Charge the Economic Development Committee with bi-annual review of this plan, driving implementation, and reporting success to the select board.
- Grow the aquaculture industry in Provincetown through branding and increased Truro collaboration opportunities. Use regional partners to conduct a feasibility study of potential products to prevent a monoculture and increase diversity and resiliency.
- Establish appropriate training programs, business services, and investment in support of the aquaculture industry including technical skills and infrastructure protection/improvements. Continued discussion with industry businesses about their needs and concerns.
- Create a substantial public awareness campaign for all property owners on assistance related to increasing the housing supply.
- Conduct planning for the "next-level" need of art and culture related entrepreneurs emerging from existing business development incubators such as The Commons and elsewhere in the community.

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Attachment 1: Action Plan Matrix

Attachment 2: Economic Data Overview

Attachment 3: Community Survey Findings

## Introduction

In the spring of 2019 the Town of Provincetown began a strategic planning process that would result in a targeted action plan designed to build on the many assets of the community in order to diversify the economy, support existing residents and businesses, and lead to a longer season. The intent of this economic development action plan is to use data, conversation, research, and analysis to identify action plans and strategies that will lead to increased opportunities and intentional economic growth that aligns with the values of Provincetown residents and visitors.

## Work Completed

To fully understand, analyze, and strategize the economic prospects for Provincetown, the Camoin Team completed an economic base analysis and market analysis to better understand the community's unique assets. These documents are included as an attachment to this report and the main findings are summarized below. A series of stakeholder interviews that were conducted to better understand issues facing the business community, residents, and developers added anecdotal and "on-the-ground" information to the data. Finally, focus groups and public meetings were held to receive feedback from community members.

As part of the initial research to create an economic development strategy for Provincetown, Camoin Associates analyzed data collected and prepared by the UMass Public Policy Institute of Dartmouth related to the demographic and economic existing conditions. The following are some of the key findings, with the full report included as Attachment 2

The following bullets summarize the basic data findings with specific focus on what the data points mean for economic development in Provincetown.

- **Over 70% of the population is over 45 years old.**



- With an older population and relatively high level of isolation at the tip of Cape Cod, Provincetown will need to pay attention to ensuring that the needs of the older residents are being met. Not only the health-related needs but also the goods and services, cultural opportunities, and recreational opportunities that they may want to enjoy throughout the year.
- An older population also impacts issues related to workforce and particularly on business owners' ability to find the workers they need. Interconnected with the aging population are the challenges that workers needed to replace those aging out of the workforce have when it comes to affording Provincetown and logistics related to traveling to and from work.
- Without many young people moving into the area (likely due to limited job and housing options) the population will continue to age and further challenge the employers and other systems in the town. Lack of an adequate supply of workforce related housing exacerbates this problem.
- Older business owners may be looking for avenues to sell their business to a successor but do not have specific knowledge of this process or have anyone local who may be interested in operating their establishment. Another challenge to business succession planning is the high seasonality of Provincetown's economy. This can negatively affect the attractiveness of certain businesses, limiting the ability of shop owners to retire.

- **The median income in Provincetown is \$57,000 per year.**



- The median income in Provincetown is \$14,000 less than the rest of Barnstable County.
- Provincetown workers are limited by their earning potential in seasonal jobs to afford the housing options in town. The dearth of affordable housing options makes it challenging for businesses to attract and retain workers.



- **Housing is extremely expensive, and the market is being driven by second home owners.**
  - The high demand and limited amount of housing has created a situation where units are extremely expensive and are continuing to increase in price. With impacts being felt from AirBnB properties, second home ownership, and infrastructure capacity issues, housing is an issue that is directly impacting economic development.
  - The seasonal, primarily service industry jobs that are in Provincetown do not make it possible for those who are working in Provincetown to live in Provincetown, and the impact of limited or challenging transportation options exacerbates the issue. 64% of renters were spending over 35% of their income on rent in 2015 and 40% of renters spent over 50% of their income. Housing affordability in Provincetown has continued to worsen since 2010.
  - Two recent reports have come out related to housing in Provincetown that highlight the situation, including “Housing on Cape Cod: The High Cost of Doing Nothing” prepared by the Housing Assistance Corporation and “Understanding the Housing Needs and Challenges Facing Provincetown, Massachusetts” completed by the UMass Dartmouth Public Policy Center. Both studies acknowledge that the housing situation is being driven by forces that make it financially feasible for owners to rent out for short time frames (seasonal, weekly, etc.) as opposed to year-round leases. This situation leaves limited rental housing options and prices out the vast majority of those working in the town.
  - In sum, housing, income and demographic challenges are constraining the economy as businesses struggle to find employees to work at their establishments creating severe labor shortages.



- **The town’s largest industries are Accommodation and Food Services and Retail Trade with a combined 1,500+ workers in 2018. Health Care and Social Assistance is the next largest industry.**
  - The data and assessment of the area make it clear that an extremely high number of the jobs in the town rely either directly or indirectly on the influx of visitors and people during the summer season.
  - The service sector jobs tend to pay less than other industries, which brings down the average income levels of those who are working in town. This reinforces the disconnect between the low earnings of those who work in town and the higher earnings of those who live or vacation in town.
  - To create more stability, higher average annual earnings for those in the tourism industry, and create more overall economic activity, the tourism season needs to be extended. Increasing the attractiveness of Provincetown in the non-summer months will require a coordinated approach between lodging, restaurants, retailers, and event planners to make coming to the town in the off-season desirable for the traveler who has so many other options. It may in fact be that “extending the season” means “repurposing the visitation focus of non-peak months” through additional venue amenities, and initiatives such as event/conference space or education/learning based visitation.
  - Health Care and Social Assistance is projected to grow, a local and national trend, as the population continues to age. Finding ways to support workers in this industry through training and housing options will be critical to ensuring that the needs of the population are able to be met. The location of Provincetown makes it difficult to access a wide variety of health care providers, so ensuring that tele-health options are available will help meet the need for specialization without having to travel to Boston or elsewhere.



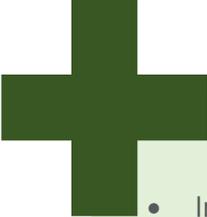
- **A high percent of local workers report being self-employed.**

- Nearly 250 workers, 9% of all workers, report being self-employed. This is higher than those who report being self-employed in the state and the nation.
- Finding ways to support these self-employed individuals through trainings, helping them find space, access to capital, and networking/collaboration opportunities will be critical to expanding their work and financial feasibility.

The Town of Provincetown has several significant challenges when it comes to creating a more year-round, higher wage, diverse and therefore sustainable economy, including issues that are not traditionally considered to be associated with economic development, such as housing. While the challenges are clear the specific solutions will not be easy, as they require an “impetus for change” among residents, property owners, and stakeholders. Provincetown is a beautiful community with many high quality of life attributes in a region (Cape Cod) with the same strengths. While there are challenges, overall things are “not all that bad” for many property owners, residents and visitors. Therefore, education and engagement around clear and focused understanding and strategies will need to occur.

## Opportunities and Challenges Assessment

The findings of the interviews/focus groups, data analysis, and knowledge of the region were compiled into a list of Provincetown's opportunities and challenges related to economic and community development. This assessment is used to inform the goals, and actions identified in the Action Plan Matrix. The full list of opportunities and challenges are outlined below.



### Provincetown's Opportunities

- Incredible natural resources and location
- Well established tourism infrastructure and brand
- Vibrant seasonal entertainment, restaurant, and retail economy
- Center for Coastal Studies and related research and recognition
- History, culture, infrastructure and assets for a marine based economy
- Arts and culture history, infrastructure, and expertise (Fine Arts Work Center, The Commons, Provincetown Art Gallery, etc)
- Support for investment in community services and housing related issues
- Access to Opportunity Zone and other investment funding



### Provincetown's Challenges

- Extreme seasonality for visitation and economy
- Limited space/sites for development
- High cost of housing
- Impact of climate change
- Inadequate transportation infrastructure, traffic congestion, and parking challenges
- Limited diversity of housing options
- Negative perception related to predictability and ease of development
- Limited resources for economic development
- Zoning regulations restricting development
- Tension within community around the vision for the future of Provincetown
- Heavy reliance on residential values for tax base
- Difficulty attracting and retaining entrepreneurial and innovative businesses

## Emerging Themes

There were a number of core economic development related themes that kept coming up throughout the planning process. These themes drove the development of the specific goals and objectives and guided the conversation about how best to move forward with the Town's economic development initiatives. The core concepts and areas for focus included:

### Blue Economy

The Blue Economy refers to activities that relate to oceans, seas, and coasts. Per the Cape Cod Blue Economy Foundation, the blue economy acknowledges that the environment is our economy. It recognizes the vast role that water- both salt and fresh, plays in our everyday life, and the importance of finding a sustainable and symbiotic course for the future<sup>1</sup>. It includes everything from fishing to tourist boats and research to aquaculture. The Blue Economy in Provincetown extends beyond just uses that are *dependent* on the water to uses that are *enhanced* by access and proximity to the ocean, including lodging, residential development, restaurants, and recreational uses. These latter issues however are covered in their own themes.

The Blue Economy opportunities that emerged from work to date and that warrant further exploration for inclusion in the economic development strategic plan are:

- Fisheries and aquaculture
- Recreation, visitor, and tourist related marine – excursions, marina services, services to the recreation boating industry, other recreation
- Education and research and development

The Blue Economy in Provincetown has played a major role in the region since the town's founding in 1727. With fishing, whale watching, pleasure cruises, access to the water, research, and water enhanced uses, Provincetown benefits from easy access to the Atlantic Ocean and to Provincetown Harbor. The town and its many partners have taken great initiative in protecting this natural resource, including investments in wastewater systems, ongoing harbor maintenance projects, research into best practices and cutting-edge science, and continuing public education on how best to protect their asset.

### Tourism

Provincetown is a world-renowned tourist destination; known for its beaches, nightlife, diversity, culture, and history. With thousands of people flocking to Provincetown between May and September, the tourism industry is one of, if not the, primary driver of the local economy. Hospitality, restaurants, stores, art galleries, and entertainment venues are all geared towards meeting the expectations of the summer season traveler. More recently visitation has grown in the shoulder seasons starting in March and April and extending into November with targeted marketing and successful event production.

The tourism and visitation markets rely on the availability of overnight lodging, which currently includes a combination of hotels, bed & breakfast, guest houses, short- and long-term rentals, and a combination of all of these. The housing situation in Provincetown puts pressure on the lodging options with condominium conversions decreasing total rooms available and summer visitation putting pressure on housing as property owners find it financially feasible to operate as short-term rentals rather than year-round rentals.

The people who travel to Provincetown during the summer season help sustain the vast majority of the existing businesses, as they spend their time and money in the economy. Working to boost tourism through increased year-round visitation will support a more functional and sustainable economy. There are not enough visitors to support

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<sup>1</sup> Source: Cape Cod Blue Economy Foundation website

businesses being open in the winter but there are not enough businesses open in the winter to support more tourism. This cycle has an impact not only on the tourism industry but also on the attractiveness of living in Provincetown year-round.

## Housing

Housing is the number one issue that came up during the interviews. The limited supply and high price of housing in Provincetown is seen as a critical constraint to establishing a functional year-round economy with room for everyone. Natural resource protection and wastewater capacity requires that restrictions be placed on the amount of new residential building that are allowed each year (15 new units per year are allowed). While these restrictions are intended as a growth management technique to protect the resources, they have also resulted in increased housing costs, increased use of year-round homes as seasonal rentals, and decreased products that are affordable to middle- and low-income individuals.

Having accessible housing options for people in a wider range of income levels will create opportunities for a more sustainable year-round economy and community. At the same time, there is a need to meet the immense demand for additional housing during the summer months to serve the tourism businesses. Currently, second home owners are able to afford to buy units, use them during the summer months and sometimes rent them per week for a portion of the summer. After the summer ends, many of these second home owners do not return again until the following summer. This creates a situation where those units are out of the year-round rental market, the rental prices are exorbitantly high for year-round workers, and there is not enough of a year-round population to support restaurants, businesses, and services in the community.

With restaurants and businesses closing during the winter, employees are forced to go on unemployment which results in a very unstable economy that does not encourage year-round residency or sustainability. Given these closures, Provincetown becomes less appealing as a year-round destination for visitors and potential residents. The seasonality of Provincetown is a major issue that needs to be addressed through a combination of initiatives, including housing policy and development.

## Learning and Research Destination

Higher education and specialized education came up as a potential opportunity for Provincetown that might fit in nicely with the seasonality of Provincetown's current activity. The concept would involve identifying an educational and/or research institution who would want to establish a location or program in Provincetown for a period of time. The focus of the program would be to build off of the existing strengths of Provincetown including hospitality, climate studies, arts/culture, or marine/coastal research.

There exist resources that could be used to further this idea, including the work that has been done around Campus Provincetown, the Center for Coastal Studies, and the Fine Arts Work Center.

- Campus Provincetown has been an effort since 1999 that focuses on utilizing the various cultural resources around the community to create educational opportunities for all ages throughout the year.
- The Center for Coastal Studies is based in Provincetown and focuses their research on the coastal environment and marine ecosystems with a focus on whales, seals, marine animal entanglement, marine debris and plastic research, and other coastal research topics.<sup>2</sup> With climate change concerns growing by the year, the Center for Coastal Studies could expand research specific to this subject and partner with an

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<sup>2</sup> Center for Coastal Studies Mission Statement: To conduct scientific research with emphasis on marine mammals of the western North Atlantic and on the coastal and marine habitats and resources of the Gulf of Maine; to promote stewardship of coastal and marine ecosystems; to conduct educational activities and to provide educational resources that encourage the responsible use and conservation of coastal and marine ecosystems; and to collaborate with other institutions and individuals whenever possible to advance the Center's mission.

educational institution who would be looking to bring cohorts into the area for research, studies, and practical experience.

- The Fine Arts Work Center is celebrating its 50<sup>th</sup> year in Provincetown and offers a residency program with a mission of encouraging the growth and development of emerging visual artists and writers to restore the year-round vitality of the historic art colony of Provincetown. This organization is internally recognized for its 7-month program, its online writing programs, and the year-round events and exhibitions in Provincetown.

With its recognition as a great place to be, Provincetown would be an attractive location for professors, students, interns, researchers and supporting faculty and could create more activity throughout the year without putting more pressure on the summer season. If dormitory housing needs to be built to serve the new student population it could be used in the summer to house seasonal workers.

## Arts and Culture

The Town of Provincetown has historically been known as an arts colony, attracting artists and performers from around the world for many decades who come to capture the beautiful landscapes and partake in the culturally diverse entertainment options. Provincetown has a number of very strong arts and culture resources to build from, including the Fine Arts Work Center, the Provincetown Art Association and Museum, the Provincetown Film Festival, the Pilgrim Monument and Provincetown Museum, the Art Reach immersion program for youth, the new Provincetown Commons art-centric incubator, and others.

Arts and culture of all kind are crucial to the Provincetown economy, including attracting year-round residents, education (Fine Arts Work Center), tourists, and the overall image of Provincetown. Museums, galleries, live performances, studio tours, landscape painting, street performers, and others bring an energy to Provincetown that cannot be replicated. Arts and culture is a main driver of tourism in the summer season and there are significant amounts of philanthropic investments being made in the arts by non-locals in the Provincetown Art Association and Museum, the Fine Arts Work Center, and other initiatives.

## Financing Opportunities

Establishing the funding streams necessary to address the challenges facing Provincetown will be important for the Town to progress towards its goals. There are only certain things that municipalities can legally do, and funding all of the desired projects with property tax revenue is unsustainable. Using the tools available to the Town, plus identifying other appropriate avenues for funding, will serve to help implement the strategy.

Using creative and innovative solutions to address the critical issues facing Provincetown will be necessary in order to make progress towards achieving the goals established by the community development strategy. Understanding what tools are available, what has been successful in other areas, and the extent to which the public will be impacted by the solutions is an important part of the planning process.

## Governance and Infrastructure

The ability to pursue economic development is somewhat constrained in Provincetown due to the highly complex environment that results from historic, environmental, and land use regulations and infrastructure capacity. The regulations are there for a reason and are designed to protect Provincetown's character, property, and residents, but negotiating the system and ensuring development can occur where appropriate is critical to economic development efforts.

## Economic Development Action Plan

The Economic Development Action Plan for Provincetown has been developed to address the primary issues, themes, and opportunities identified. The following goals/strategies recognize that there are many different economic sectors and issues at play in Provincetown that are driving or constraining the community's ability to achieve the goals of an increasingly year-round economy. While the goals are geared towards the different issues, they have been framed in a way that showcases Provincetown's desire to be entrepreneurial, leverage the unique community character, and create sustainable prosperity for all. The intent of this strategy is not to address every single issue related to economic development, but rather to focus on strategic opportunities that have the best chance of implementation and will result in advancement towards achieving the community's goals.

These initiatives are intended to act as a work plan for Provincetown and partner organizations and task status should be reviewed regularly for progress-to-completion or a need to change course. While these are important goals and objectives right now, the ever-changing economy, as well as fluctuating state and national priorities, are likely to dictate adjustments to the plan.

The following is a narrative description of the Action Plan Matrix. More detail is provided immediately following in the Action Plan Matrix itself.

The Town of Provincetown's intent when crafting this strategy has been to develop an economic and community development strategic plan that highlights and addresses the critical priorities of the community to achieve the goals of a sustainable, diverse, and increasingly year-round economy.

## Implementation

Successful implementation of a plan must be based on strategies that are grounded in data, fit with market conditions, and most importantly be responsive to the needs and hopes for the community. There must also be a recognized and well defined "imperative for change" which integrates an awareness of current conditions and forces with a willingness to learn and to work together to create a sustainable future. Change can be difficult as it threatens comfort with current conditions and forces communities to look towards a future with ever increasing risk and uncertainty. Two factors are important for Provincetown to embrace it's imperative for change and take informed and reasoned action to make it happen including: empowering visionary leadership and increasing capacity for implementation.

*Leadership:* Proper implementation of an action plan like this requires a combination of consistent leadership and coordinated partnerships among various organizations. Leadership must have the vision to empower implementation partners and find ongoing opportunities for collaboration. Working to create both political and non-political advocates for the priority projects will be critical to get buy-in and support from other residents who may not be as engaged or as supportive of investment in economic and community development initiatives. Leadership comes in many forms including formal and informal and in Provincetown success requires both.

*Capacity:* Capacity includes people, resources, knowledge, and structures. It is not intended that this strategy be implemented solely by the Town staff. However, with any increase in initiatives and economic development efforts there is an increase in demands placed on staff capacity resources. The plan does encourage a review of staff resources and identification of any areas where additional staff or outside assistance is necessary to make progress on the actions identified.



## Priority First Steps

While all the strategies are important and have been included for a reason, the following should be implemented as soon as possible as they will have the greatest impact and result in momentum for the overall effort.

- Charge the Economic Development Committee with bi-annual review of this plan, driving implementation, and reporting success to the select board.
- Grow the aquaculture industry in Provincetown through branding and increased Truro collaboration opportunities. Use regional partners to conduct a feasibility study of potential products to prevent a monoculture and increase diversity and resiliency.
- Establish appropriate training programs, business services, and investment in support of the industry including technical skills and infrastructure protection/improvements. Continued discussion with industry businesses about their needs and concerns.
- Create a substantial public awareness campaign for all property owners on assistance related to increasing the housing supply.
- Conduct planning for the “next-level” need of art and culture related entrepreneurs emerging from existing business development incubators such as The Commons and elsewhere in the community.

## Goal 1 Build and support entrepreneurship in Provincetown's Blue Economy.

**Rationale:** The Blue Economy has been and will continue to be a significant economic driver for Provincetown. Supporting entrepreneurship and small business development within the Blue Economy will result in a diversified economy, increased natural resource protection, and a more sustainable and year-round economy. Opportunities to cultivate a more entrepreneurial environment centered around the Blue Economy will generate spin-off opportunities that will create economic activity, raise the bar when it comes to research, and create the type of ecosystem that will drive other business activity.

**Blue economy** includes all economic activities related to the ocean and near shore, including: fishing, marine and coastal research and development, marine recreation, marine and coastal tourism, water-based transportation, and other activities.

### Strategy #1.A. - Expand Provincetown's recognition as a leader in Blue Economy education and research by engaging partners in collaboration.

- i. Facilitate the establishment of a Blue Economy Task Force that oversees the various issues related to the waterfront including the waterfront district, aquaculture, harbor, pier, public and private organizations, and others. Identify opportunities for shared resources, collaborative approaches, and best practices.
- ii. Engage with the Center for Coastal Studies, Stellwagen Bank National Marine Sanctuary, and International Fund for Animal Welfare (IFAW) to understand their mid to long range plans and potential partnering opportunities.
- iii. Support the Center for Coastal Studies in efforts to expand facilities and housing; assist with identification and attraction of research and development/commercialization and education partners including businesses, academic, and research institutions. Work to assist to address challenges such as housing and workforce needs.
- iv. Support research of the feasibility of establishing an accelerator for commercialization and economic growth related to coastal, maritime, and marine studies.

**Accelerator:** A business accelerator is a program that gives developing companies access to mentorship, investors and other support that helps them become stable, self-sufficient businesses. Companies that use business accelerators are typically start-ups that have moved beyond the earliest stages of getting established.

Develop a **well-researched and funded business plan to guide accelerator operations** and achieve both the Blue Economy and Provincetown's community development goals. Focus on the partner Center's core competency areas of water quality, endangered species, climate change, marine debris/plastics pollution and plan for implementation and establishment. Accelerator should combine facilities with support programming to help start-ups advance into growth stages – look to Bigelow Labs as an example.

## Strategy #1.B. - Grow the Blue Economy by developing and improving resources to provide the region with quality aquaculture products.

- i. Create a growers association to oversee marketing and development of the industry in Provincetown that includes representation from all partners involved. Encourage growers association to identify and pursue synergies with shared resources like work platforms, nursery, hatchery, landing facilities, and more direct farm-to-table connections.
- ii. Survey the business people about what types of amenities, services, and infrastructure/facilities would be most important to grow the aquaculture industry. Create inventory of potential sites for needed facilities. Examine practices and models elsewhere to develop the right model for Provincetown. Develop a financial feasibility analysis to measure the cost/benefit, necessary investments and ongoing operational costs. Put together necessary financing including a blend of private investment from industry, public town support, and other available funding.
- iii. Implement the Harbor Plan recommendations.

Feedback from those in the industry in Provincetown indicate that **improvements that are needed to support industry growth** including: rebuilding of floating docks, expanded ice machine capability, connection among the three piers, greater level of service at public pier, access to tool shed, additional cranes, office space, better offloading space and equipment.

## Strategy #1.C. - Develop the industry network and support entrepreneurs by aligning aquaculture investments by Provincetown with partners and programs.

- i. Grow the aquaculture industry in Provincetown through branding and increased Truro collaboration opportunities. Use regional partners to conduct a feasibility study of potential products to prevent a monoculture and increase diversity and resiliency.
- ii. Establish appropriate training programs, business services, and investment in support of the industry including technical skills and infrastructure protection/improvements. Continued discussion with industry businesses about their needs and concerns.
- iii. Research potential expansion of local landing capacity.
- iv. Pursue resources and opportunities to find or create an established primary buyer dedicated to Provincetown and Truro.
- v. Increase production through streamlined permitting, establishment of work floats, and development of fast growing and inexpensive seed.

## Goal 2 Promote collaboration among Provincetown's tourism, education, culture, arts, and recreation assets.

**Rationale:** Finding ways to support the business ventures of artists as well as the education and tourism potential related to these assets will continue to expand the visitor market while strengthening the existing art and culture economy and brand of Provincetown. Focusing resources on supporting the artists and their ability to be financially sustainable will further strengthen the economy and attract even more producers and consumers of arts and culture.

There are **many different reasons why people travel to Provincetown** and it's important to encourage, nurture, and promote all of the unique and wonderful assets.

### Strategy #2.A. - Increase sustainability of the tourism industry by strengthening efforts to develop Provincetown's brand among arts, culture, and recreation travelers.

- i. Retain a third-party facilitator to establish a strong and lasting workplan based on action items identified by the Town, Provincetown Business Guild, Chamber of Commerce, local and regional banks, and others who have a stake in creating more off-peak tourism.
- ii. Continue to increase the arts and cultural offerings/events/attractions in town through funding targeted towards goals that align with economic development priorities, support of existing attractions, and cross-promotional opportunities. Priority funding should be given to efforts that exhibit some or all of the following: leverages funds by other partners including the applicant, builds on the Town's core branding efforts, and has potential to increase economic activity that brings in outside spending. Incorporate regular public awareness efforts to expand education of grant program purpose and impact.
- iii. Conduct targeted attraction work in the appropriate demographics related to the arts, cultural amenities, and related attractions. Encourage local resident artists and gallery owners to get involved on a larger scale with those in the industry to keep Provincetown at the forefront.
- iv. Expand shoulder season offerings of walking tours, interpretive hikes, birding, bike rides, ecotours and more to capture visitors looking for an off-season experience of the many natural resources of Provincetown.

Creating targets for grant funding of tourism related programming is critical to ensure that funds are being spent thoughtfully and intentionally. Pursuing this type of approach will require setting priorities that the community can get behind and support. Funders should create metrics and issue a regular dashboard for measuring success and impact of grants (private investment, number of beds, people involved, etc.).

## Strategy #2.B. - Pursue and support development of a conference center to extend shoulder season economic activity, diversify the tourism economy, and create educational opportunities.

- i. Form a working group with representation from the Town, Chamber of Commerce, and Provincetown Business Guild to develop a base outline and list of assumptions related to a potential conference center. Use this outline to conduct an economic and fiscal impact analysis to understand and promote the impact of this type of project on the regional economy and local budgets.
- ii. Conduct a community visioning session to guide development of a conference center that aligns with community design desires.
- iii. Create an inventory of potential locations for the conference center and supporting amenities (lodging, restaurants, transportation, etc.). Identify the infrastructure and financing necessary to complete the desired development project.
- iv. Redevelop existing properties to be more modern and accommodate events. Initiate discussion with potential property owners to understand interest and plans.

Access to a wide variety of lodging is critical to being able to expand tourism opportunities and attract any type of conference or event activity. Recent loss in hotel rooms and the conversion of guest houses to condos has fiscal implications and decreases available lodging amenities for guests.

## Strategy #2.C. - Continue to grow the strength of the arts and culture economy in Provincetown.

- i. Conduct planning for the “next-level” need of art and culture related entrepreneurs emerging from existing business development incubators such as The Commons and elsewhere in the community.
- ii. Establish an art-centric accelerator that is focused on attracting arts-entrepreneurs to participate in a formal and intensive program that will support local artists, encourage more artists to join the community, build the local brand, and establish a more sustainable arts economy. Include both incubation and acceleration space as well as programming through coordination with The Commons and other organizations.
- iii. Complete an art and design audit to inventory and define the creative economy in Provincetown. Use the findings of the inventory to start and continue conversation with artists and arts organizations around the needs of artists to maintain a sustainable arts economy and development of a suite of services. Consider opportunities for space, housing, equipment storage/rental, and micro-grants as supporting the underlying arts ecosystem that is enjoyed by so many different industries.

## **Goal 3    Expand the housing options in Provincetown through innovative programs and land use policies.**

**Rationale:** Lack of housing options is a severe constraint on economic development opportunities and addressing this issue will require strategic and targeted approaches that build on best-practices being used around the country. Additional research and strategy development will be required to fully address these issues in a meaningful and lasting way.

### **Strategy #3.A. - Increase density allowance and increase public awareness work around why density and affordability are critical to the long-term sustainability of the town.**

- i. Conduct a comprehensive review of zoning, land use regulations, permitting, and licensing and how they align with the goals of the community. Identify opportunities to provide clear guidance that limits costs and time overruns associated with development.
- ii. Utilize community engagement events to explain and inform about the need, impact, and means of increasing density, affordability and community improvements.
- iii. Create a substantial public awareness campaign for all property owners on assistance related to increasing the housing supply.

### **Strategy #3.B. - Creation of dormitory housing to address seasonal worker housing issue and potential synergies with off-season education and conference housing.**

- i. Build consortium of people/organizations (public and private) who are interested/willing to lead a community visioning process to create clear guidance for a developer about what will be acceptable and move through the process.
- ii. Create inventory of existing structures and potential sites and review all related land use regulations to identify opportunities.
- iii. Research infrastructure and financing needs related to development of a large housing project.
- iv. Research potential developers that have completed similar types of projects in the region and explore opportunities for potential public-private partnerships to implement in Provincetown.

### **Strategy #3.C. - Play an active role in regional partnerships to achieve mutually beneficial goals.**

- i. Continued support of existing housing organizations and expansion of their efforts to other properties in town.

- ii. Research potential redevelopment of the Truro Highlands property in coordination with the Town of Truro and National Park Service. Follow a redevelopment roadmap example that includes establishment of a regional governing body, conducting thorough market analysis, testing potential redevelopment scenarios, and pursuing development through an RFQ process.
- iii. Support regional Community Development Block Grant applications.

**Pursue a developer RFP** by conducting a market analysis, establishing a basic pro forma analysis, and identifying potential return on investment for a developer. Issue developer RFP and select developer that aligns with the community's goals.

## **Goal 4 | Address Provincetown's critical issues through inclusive consensus building and new financing models.**

**Rationale:** Pursuing economic and community development in an environmentally and economically sustainable way will require Provincetown to address issues related to visions for the waterfront that provide clear and comprehensive directive to any potential developer about what is wanted through a waterfront master plan and overall improved community discussions.

### **Strategy #4.A. - Designate a waterfront district with clear development vision.**

- i. Create a waterfront development master plan that builds on the Town's Comprehensive Plan, Harbor Plan, Municipal Vulnerability Preparedness program, and provides detail on district needs, strategies and actions regarding projects to be completed and financing mechanisms to make implementation possible. Establish necessary oversight entity to pursue implementation in line with environmental sustainability and coastal resiliency goals.
- ii. Integrate use of District Increment Financing (DIF)/Tax Increment Financing (TIF), Opportunity Zone, Seaport Bond Fund, State Tax Credits as part of financing strategy.
- iii. Activate the harbor through lighting, signage allowances, benches, trash cans, restaurant/store access points, boardwalk, and increased infrastructure to encourage public access, feature waterfront businesses, and highlight resource areas including the commercial fishing industry.

### **Strategy #4.B. - Increase capacity, community consensus, and inclusive conversations around economic development issues.**

- i. Charge the Economic Development Committee with bi-annual review of this plan, driving implementation, and reporting success to the select board.
- ii. Review training and ongoing support for volunteers, board members, and select board members related to economic development issues.
- iii. Conduct full review of Town capacity and identify areas where increased resources, including contracting with subject matter experts, are required to implement the economic development strategy and other priority projects.
- iv. Continue to hold community forum events to discuss major issues and build community consensus. Implement recommendations of the Massachusetts Office of Public Collaboration report.
- v. Further pursue discussions between year-round and second home owners to improve dialogue and understanding. Continue to analyze the most effective and efficient means of communication and engagement.

## Goal 5 Align infrastructure investments to community goals.

**Rationale:** Community development goals are constrained by existing infrastructure, primarily the transportation and water/sewer infrastructure. Looking for ways to expand the networks to address the existing and future needs of residents, workers, visitors, and businesses will help further the initiatives identified throughout the economic action plan.

### Strategy #5.A. - Expand public transportation options to meet the regional workforce and visitor needs.

- i. Maintain and enhance interconnectedness of the Town's various transportation infrastructure/services including ferry, air service, and bike trails and increase communication, marketing, and promotion of these assets.
- ii. Review regional transportation service and identify needs and opportunities to expand service to support inter-regional workforce potential. Create a regional task force charged with researching these issues and working together to develop financially viable solutions.
- iii. Implement findings of the parking study including establishing a new parking system that offers dynamic pricing.

### Strategy #5.B. - Increase water and sewer capacity.

- i. Conduct feasibility study to increase sewer access to areas immediately outside of the downtown district.

Taking a **regional approach to economic and community development** initiatives will be critical to moving the needle on many of the issues. Sharing resources, expertise, assets, networks, and infrastructure will create the capacity and critical mass needed to make things happen that will benefit the larger region. The first step towards regional approaches is to acknowledge the fact that "we're all in this together" and work to move towards shared goals.

A recent study published by the Massachusetts Department of Transportation finds that the **Provincetown Municipal Airport creates 390 jobs, nearly \$14 million in payroll and \$35 million in output.**

## Provincetown Critical Partners and Measures of Success

### Goal 1: Build and support entrepreneurship in Provincetown's Blue Economy.

**Partners:** Town of Provincetown, Town of Truro, Bridgewater State, Cape Cod Community College, Center for Coastal Studies, International Fund for Animal Welfare, Johnson and Wales, K-8 schools, National Seashore, Stellwagen Bank National Marine Sanctuary, Woods Hole

**Measures of Success:** Total number of product caught and served in Provincetown; Total number of establishments and employees in the industry

### Goal 2: Promote collaboration among Provincetown's tourism, education, culture, arts, and recreation assets.

**Partners:** Town of Provincetown, Cape School of Arts, Castle Hill, Center for Coastal Studies, Chamber of Commerce, Fine Arts Work Center, Friends of the National Seashore, IB School System, National Seashore, PAAM, Pilgrim Monument and Provincetown Museum, Provincetown Business Guild, The Commons Visitor Services Board

**Measures of Success:** Total number of hotel beds; Total amount of short-term rental tax and occupancy tax revenue; Gallery revenue

### Goal 3: Expand the housing options in Provincetown through innovative programs and land use policies.

**Partners:** Town of Provincetown, Town of Truro, Community Development Partnership, Community Housing Council, Homeless Prevention Council, Housing Assistance Corporation, Housing Authority, Mass Housing Partner, Year-Round Rental Housing Trust

**Measures of Success:** Stable median house prices; Total number of accessible units

### Goal 4: Address Provincetown's critical issues through inclusive consensus building and new financing models.

**Partners:** Economic Development Committee, Harbor Committee, Pier Corps, Select Board

**Measures of Success:** Number of participants in meetings; Property value of waterfront district; Town parking revenue

### Goal 5: Align infrastructure investments to community goals.

**Partners:** Town of Provincetown Director of Emergency Management and Parking Coordinator, Town of Provincetown Department of Public Works, Town of Truro, AECOM, Cape Air, Cape Cod Regional Transit Authority

**Measures of Success:** Number of public transportation users; Completed feasibility study

## Attachment 1: Action Plan Matrix



**Goal 1: Build and support entrepreneurship in Provincetown's Blue Economy.**

Rationale: The Blue Economy has been and will continue to be a significant economic driver for Provincetown. Supporting entrepreneurship and small business development within the Blue Economy will result in a diversified economy, increased natural resource protection, and a more sustainable and year-round economy. Opportunities to cultivate a more entrepreneurial environment centered around the Blue Economy will generate spin-off opportunities that will create economic activity, raise the bar when it comes to research, and create the type of ecosystem that will drive other business activity.

1	Strategy	Actions	Priority and Timeframe
1.a	Expand Provincetown's recognition as a leader in Blue Economy education and research by engaging partners in collaboration.	i. Facilitate the establishment of a Blue Economy Task Force that oversees the various issues related to the waterfront including the waterfront district, aquaculture, harbor, pier, public and private organizations, and others. Identify opportunities for shared resources, collaborative approaches, and best practices. ii. Engage with the Center for Coastal Studies, Stellwagen Bank National Marine Sanctuary, International Fund for Animal Welfare (IFAW), to understand their mid to long range plans and potential partnering opportunities. iii. Support the Center for Coastal Studies in efforts to expand facilities and housing; assist with identification and attraction of research and development/commercialization and education partners including businesses, academic, and research institutions. Work to assist to address challenges such as housing and workforce needs. iv. Support research of the feasibility of establishing an accelerator for commercialization and economic growth related to coastal, maritime, and marine studies.	High, Short-term and ongoing
1.b	Grow the Blue Economy by developing and improving resources to provide the region with quality aquaculture products.	i. Create a growers association to oversee marketing and development of the industry in Provincetown that includes representation from all partners involved. Encourage growers association to identify and pursue synergies with shared resources like work platforms, nursery, hatchery, landing facilities, and more direct farm-to-table connections. ii. Survey the business people about what types of amenities, services, and infrastructure/facilities would be most important to grow the aquaculture industry. Create inventory of potential sites for needed facilities. Examine practices and models elsewhere to develop the right model for Provincetown. Develop a financial feasibility analysis to measure the cost/benefit, necessary investments and ongoing operational costs. Put together necessary financing including a blend of private investment from industry, public town support, and other available funding. iii. Implement the Harbor Plan recommendations.	High, Short-term and ongoing
1.c	Develop the industry network and support entrepreneurs by aligning aquaculture investments by Provincetown with partners and programs	i. Grow the aquaculture industry in Provincetown through branding and increased Truro collaboration opportunities. Use regional partners to conduct a feasibility study of potential products to prevent a monoculture and increase diversity and resiliency. ii. Establish appropriate training programs, business services, and investment in support of the industry including technical skills and infrastructure protection/improvements. Continued discussion with industry businesses about their needs and concerns. iii. Research potential expansion of local landing capacity. iv. Pursue resources and opportunities to find or create an established primary buyer dedicated to Provincetown and Truro. v. Increase production through streamlined permitting, establishment of work floats, and development of fast growing and inexpensive seed.	High, Short-term and ongoing

Lead and Partners: Town of Provincetown, Town of Truro, Bridgewater State, Cape Cod Community College, Center for Coastal Studies, International Fund for Animal Welfare, Johnson and Wales, K-8 schools, National Seashore, Stellwagen Bank National Marine Sanctuary, Woods Hole.

Measures of Success: Total number of product caught and served in Provincetown; Total number of establishments and employees in the industry

**Goal 2: Promote collaboration among Provincetown's tourism, education, culture, arts, and recreation assets.**

Rationale: Finding ways to support the business ventures of artists as well as the education and tourism potential related to these assets will continue to expand the visitor market while strengthening the existing art and culture economy and brand of Provincetown. Focusing resources on supporting the artists and their ability to be financially sustainable will further strengthen the economy and attract even more producers and consumers of arts and culture.

2	Strategy	Actions	Priority and Timeframe
2.a	Increase sustainability of the tourism industry by strengthening efforts to develop Provincetown's brand among arts, culture, and recreation travelers.	<ul style="list-style-type: none"> <li>i. Retain a third party facilitator to establish a strong and lasting workplan based on action items identified by the Town, Provincetown Business Guild, Chamber of Commerce, local and regional banks, and others who have a stake in creating more off-peak tourism.</li> <li>ii. Continue to increase the arts and cultural offerings/events/attractions in town through funding targeted towards goals that align with economic development priorities, support of existing attractions, and cross-promotional opportunities. Priority funding should be given to efforts that exhibit some or all of the following: leverage funds by other partners including applicant, builds on the Town's core branding efforts, and has potential to increase economic activity that brings in outside spending. Incorporate regular public awareness efforts to expand education of grant program purpose and impact.</li> <li>iii. Conduct targeted attraction work in the appropriate demographics related to the arts, cultural amenities, and related attractions. Encourage local resident artists and gallery owners to get involved on a larger scale with those in the industry to keep Provincetown at the forefront.</li> <li>iv. Expand shoulder season offerings of walking tours, interpretive hikes, birding, bike rides, ecotours and more to capture visitors looking for an off-season experience of the many natural resources of Provincetown.</li> </ul>	High, Midterm
2.b	Pursue and support development of a conference center to extend shoulder season economic activity, diversify the tourism economy, and create educational opportunities.	<ul style="list-style-type: none"> <li>i. Form a working group with representation from the Town, Chamber of Commerce, and Provincetown Business Guild to develop a base outline and list of assumptions related to a potential conference center. Use this outline conduct an economic and fiscal impact analysis to understand and promote the impact of this type of project on the regional economy and local budgets.</li> <li>ii. Conduct a community visioning session to guide development of a conference center that aligns with community design desires.</li> <li>iii. Create an inventory of potential locations for the conference center and supporting amenities (lodging, restaurants, transportation, etc.). Identify the necessary infrastructure and financing necessary to complete the desired development project.</li> <li>iv. Redevelop existing properties to be more modern and accommodate events. Initiate discussion with potential property owners to understand interest and plans.</li> </ul>	High, Midterm
2.c	Continue to grow the strength of the arts and culture economy in Provincetown.	<ul style="list-style-type: none"> <li>i. Conduct planning for the "next-level" need of art and culture related entrepreneurs emerging from existing business development incubators such as The Commons and elsewhere in the community</li> <li>ii. Establish an art-centric accelerator that is focused on attracting arts-entrepreneurs to participate in a formal and intensive program that will support local artists, encourage more artists to join the community, build the local brand, and establish a more sustainable arts economy. Include both incubation and acceleration space as well as programming through coordination with The Commons and other organizations.</li> <li>iii. Complete an art and design audit to inventory and define the creative economy in Provincetown. Use the findings of the inventory to start and continue conversation with artists and arts organizations around the needs of artists to maintain a sustainable arts economy and development of a suite of services. Consider opportunities for space, housing, equipment storage/rental, and micro-grants as supporting the underlying arts ecosystem that is enjoyed by so many different industries.</li> </ul>	Medium, Midterm

Lead and Partners: Town of Provincetown, Cape School of Arts, Castle Hill, Center for Coastal Studies, Chamber of Commerce, Fine Arts Work Center, Friends of the National Seashore, IB School System, National Seashore, PAAM, Pilgrim Monument and Provincetown Museum, Provincetown Business Guild, The Commons Visitor Services Board.

Measures of Success: Total number of hotel beds; Total amount of short-term rental tax and occupancy tax revenue; Gallery revenue

**Goal 3: Expand the housing options in Provincetown through innovative programs and land use policies.**

Rationale: Lack of housing options is a severe constraint on economic development opportunities and addressing this issue will require strategic and targeted approaches that build on best-practices being used around the country. Additional research and strategy development will be required to fully address these issues in a meaningful and lasting way.

3	Strategy	Actions	Priority and Timeframe
3.a	Increase density allowance and increase public awareness work around why density and affordability are critical to the long-term sustainability of the town.	<ul style="list-style-type: none"> <li>i. Conduct comprehensive review of zoning, land use regulations, permitting, and licensing and how they align with the goals of the community. Identify opportunities to provide clear guidance that limit costs and time overruns associated with development.</li> <li>ii. Utilize community engagement events to explain and inform about the need, impact, and means of increasing density, affordability and community improvements.</li> <li>iii. Create a substantial public awareness campaign for all property owners on assistance related to increasing the housing supply.</li> </ul>	High, Immediate and ongoing
3.b	Creation of dormitory housing to address seasonal worker housing issue and potential synergies with off-season education and conference housing.	<ul style="list-style-type: none"> <li>i. Build consortium of people/organizations (public and private) who are interested/willing to lead a community visioning process to create clear guidance for a developer about what will be acceptable and move through the process.</li> <li>ii. Create inventory of existing structures and potential sites and review all related land use regulations to identify opportunities.</li> <li>iii. Research infrastructure and financing needs related to development of a large housing project.</li> <li>iv. Research potential developers that have completed similar types of projects in the region and opportunities for potential public-private partnerships to implement in Provincetown.</li> </ul>	Medium, Short-term
3.c	Play an active role in regional partnerships to achieve mutually beneficial goals.	<ul style="list-style-type: none"> <li>i. Continued support of existing housing organizations and expansion of their efforts to other properties in town.</li> <li>ii. Research potential redevelopment of the Truro Highlands property in coordination with the Town of Truro and National Park Service. Follow a redevelopment roadmap example that includes establishment of a regional governing body, conducting thorough market analysis, testing potential redevelopment scenarios, and pursuing development through an RFQ process.</li> <li>iii. Support regional Community Development Block Grant applications.</li> </ul>	Medium, Midterm

Lead and Partners: Town of Provincetown, Town of Truro, Community Development Partnership, Community Housing Council, Homeless Prevention Council, Housing Assistance Corporation, Housing Authority, Mass Housing Partner, Year-Round Rental Housing Trust,

Measures of Success: Stable median house prices; Total number of accessible units

<b>Goal 4: Address Provincetown's critical issues through inclusive consensus building and new financing models.</b>			
Rationale: Pursuing economic and community development in an environmentally and economically sustainable way will require Provincetown to address issues related to visions for the waterfront that provide clear and comprehensive directive to any potential developer about what is wanted through a waterfront master plan and overall improved community discussions.			
<b>4</b>	<b>Strategy</b>	<b>Actions</b>	<b>Priority and Timeframe</b>
4.a	Designate a waterfront district with clear development vision.	<ul style="list-style-type: none"> <li>i. Create a waterfront development master plan that builds on the Town's Comprehensive Plan, Harbor Plan, Municipal Vulnerability Preparedness program, and provides detail on district needs, strategies and actions regarding projects to be completed and financing mechanisms to make implementation possible. Establish necessary oversight entity to pursue implementation in line with environment sustainability and coastal resiliency goals.</li> <li>ii. Integrate use of District Increment Financing (DIF)/Tax Increment Financing (TIF) and Opportunity Zone, Seaport Bond Fund, State Tax Credits as part of financing strategy.</li> <li>iii. Activate the harbor through lighting, signage allowances, benches, trash cans, restaurant/store access points, boardwalk, and increased infrastructure to encourage public access, feature waterfront businesses, and highlight resource areas including the commercial fishing industry.</li> </ul>	High, Midterm
4.b	Increase capacity, community consensus, and inclusive conversations around economic development issues.	<ul style="list-style-type: none"> <li>i. Charge the Economic Development Committee with bi-annual review of this plan, driving implementation, and reporting success to the select board.</li> <li>ii. Review training and ongoing support for volunteers, board members, and select board members related to economic development issues.</li> <li>iii. Conduct full review of Town capacity and identify areas where increased resources, including contracting with subject matter experts, are required to implement the economic development strategy and other priority projects.</li> <li>iv. Continue to hold community forum events to discuss major issues and build community consensus. Implement recommendations of the Massachusetts Office of Public Collaboration report.</li> <li>v. Further pursue discussions between year-round and second home owners to improve dialogue and understanding. Continue to analyze the most effective and efficient means of communication and engagement.</li> </ul>	Medium, Midterm and ongoing
Lead and Partners: Town of Provincetown, Economic Development Committee, Pier Corps, Harbor Committee, Select Board			
Measures of Success: Number of participants in meetings; Property value of waterfront district; Town parking revenue			

**Goal 5: Align infrastructure investments to community goals.**

Rationale: Community development goals are constrained by existing infrastructure, primarily the transportation and water/sewer infrastructure. Looking for ways to expand the networks to address the existing and future needs of residents, workers, visitors, and businesses will help further the initiatives identified throughout the economic action plan.

5	Strategy	Actions	Priority and Timeframe
5.a	Expand public transportation options to meet the regional workforce and visitor needs.	i. Maintain and enhance interconnectedness of the Town's various transportation infrastructure/services including ferry, air service, and bike trails and increase communication, marketing, and promotion of these assets. ii. Review regional transportation service and identify needs and opportunities to expand service to support inter-regional workforce potential. Create a regional task force charged with researching these issues and working together to develop financially viable solutions. iii. Implement findings of the parking study including establishing a new parking system that offers dynamic pricing.	High, Midterm
5.b	Increase water and sewer capacity.	i. Conduct feasibility study to increase sewer access to areas immediately outside of the downtown district.	Medium, Midterm

Lead and Partners: Town of Provincetown Director of Emergency Management and Parking Coordinator, Town of Provincetown Department of Public Works, Town of Truro, AECOM, Cape Air, Cape Cod Regional Transit Authority

Measures of Success: Number of public transportation users; Completed feasibility study

## Attachment 2: Economic Data Overview



# Data Summary and Analysis

Town of Provincetown, MA

November 20, 2018

Prepared for:  
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## About Camoin Associates

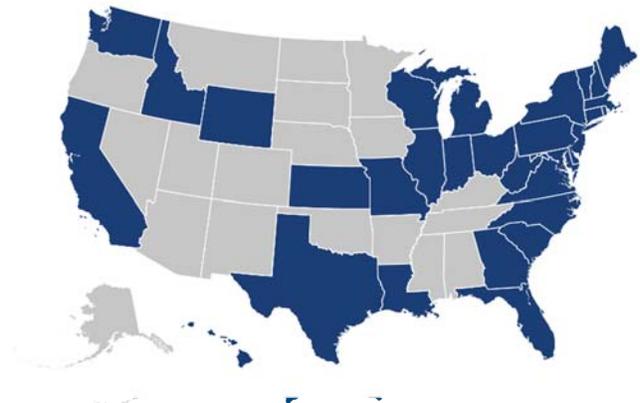
Camoin Associates has provided economic development consulting services to municipalities, economic development agencies, and private enterprises since 1999. Through the services offered, Camoin Associates has had the opportunity to serve EDOs and local and state governments from Maine to California; corporations and organizations that include Lowes Home Improvement, FedEx, Amazon, Volvo (Nova Bus) and the New York Islanders; as well as private developers proposing projects in excess of \$6 billion. Our reputation for detailed, place-specific, and accurate analysis has led to projects in 31 states and garnered attention from national media outlets including *Marketplace* (NPR), *Forbes* magazine, *The New York Times* and *The Wall Street Journal*. Additionally, our marketing strategies have helped our clients gain both national and local media coverage for their projects in order to build public support and leverage additional funding. We are based in Saratoga Springs, NY, with regional offices in Portland, ME; Boston, MA; Richmond, VA and Brattleboro, VT. To learn more about our experience and projects in all of our service lines, please visit our website at [www.camoinassociates.com](http://www.camoinassociates.com). You can also find us on Twitter [@camoinassociate](https://twitter.com/camoinassociate) and on [Facebook](https://www.facebook.com/camoinassociate).

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## Executive Summary

The Town of Provincetown is undergoing an economic development strategic planning process to position itself to create a more functional and sustainable year-round economy. For any strategic planning process, it is critical to first lay the groundwork to understand the existing conditions. The following report is a review of the existing economic conditions in the town that lays the foundation for the development of specific economic development recommendations.

The following report summarizes a report completed by the UMass Dartmouth Public Policy Center titled “A Baseline Assessment of the Economic Conditions in Provincetown, Massachusetts” and works to analyze what that means for economic development. Key data findings with implications for economic development are listed below with more detail in the full report.

## Key Findings

The following bullets summarize the basic data findings with specific focus what the data points mean for economic development in Provincetown.

- **Over 70% of the population is over 45 years old.**
  - With an older population and relatively high level of isolation at the tip of Cape Cod, Provincetown will need to pay attention to ensuring that the needs of the older residents are being met. Not only the health-related needs but also the goods and services, cultural opportunities, and recreational opportunities that they may want to enjoy throughout the year.
  - An older population also impacts issues related to workforce and particularly on business owners’ ability to find the workers they need. Interconnected with the aging population are the challenges that workers to replace those aging out of the workforce have when it comes to affording Provincetown and logistics related to traveling to and from work.
  - Without many young people moving into the area (likely due to limited job and housing options) the population will continue to age and further challenge the employers and other systems in the town. Lack of an adequate supply of workforce related housing exacerbates this problem.
  - Older business owners may be looking for avenues to sell their business to a successor but do not have specific knowledge of this process or have anyone local who may be interested in operating their establishment. Another challenge to business succession planning is the high seasonality of Provincetown’s economy. This can negatively affect the attractiveness of certain businesses, limiting the ability of shop owners to retire.
  
- **The median income in Provincetown is \$57,000 per year.**
  - The median income in Provincetown is \$14,000 less than the rest of Barnstable County.
  - Provincetown workers are limited by their earning potential in seasonal jobs to afford the housing options in town. The dearth of affordable housing options makes it challenging for businesses to attract and retain workers.
  
- **Housing is extremely expensive, and the market is being driven by second home owners.**
  - The high demand and limited amount of housing has created a situation where the units are extremely expensive and continuing to increase. With impacts being felt by AirBnB properties, second home ownership, and infrastructure capacity issues, housing is an issue that is directly impacting economic development.
  - The seasonal, primarily service industry jobs that are in Provincetown do not make it possible for those who are working in Provincetown to live in Provincetown, and the impact of limited or challenging transportation options exacerbates the issue. 64% of renters were spending over 35%

of their income on rent in 2015 and 40% of renters spent over 50% of their income. Housing affordability in Provincetown has continued to worsen since 2010.

- Two recent reports have come out related to housing in Provincetown that highlight the situation, including “Housing on Cape Cod: The High Cost of Doing Nothing” prepared by the Housing Assistance Corporation and Understanding the Housing Needs and Challenges Facing Provincetown, Massachusetts” completed by the UMass Dartmouth Public Policy Center. Both studies acknowledge that the housing situation is being driven by forces that make it financially feasible for owners to rent out for short time frames (seasonal, weekly, etc.) as opposed to a year-round lease. This situation leaves limited rental housing options and prices out the vast majority of those working in the town.
  - In sum, housing, income and demographic challenges are constraining the economy as businesses struggle to find employees to work at their establishments creating severe labor shortages.
- **The town’s largest industries are the Accommodation and Food Services and Retail Trade with a combined 1,500+ workers in 2018. Health Care and Social Assistance is the next largest industry.**
    - The data and assessment of the area make it clear that an extremely high number of the jobs in the town rely either directly or indirectly on the influx of visitors and people during the summer season.
    - The service sector jobs tend to pay less than other industries, which brings down the average income levels of those who are working in town. This reinforces the disconnect between the low earnings of those who work in town and the higher earnings of those who live or vacation in town.
    - To create more stability, higher average annual earnings for those in the tourism industry, and create more overall economic activity, the tourism season needs to be extended. Increasing the attractiveness of Provincetown in the non-summer months will require a coordinated approach between lodging, restaurants, retailers, and event planners to make coming to the town in the off-season desirable for the traveler who has so many other options. It may in fact be that “extending the season” means “repurposing the visitation focus of non-peak months” through additional venues amenities, and initiatives such as event/conference space or education/learning based visitation.
    - Health Care and Social Assistance is projected to grow, a local and national trend as the population continues to age. Finding ways to support workers in this industry through training and housing options will be critical to ensuring that the needs of the population are able to be met. The location of Provincetown makes it difficult to access a wide variety of health care providers, so ensuring that tele-health options are available will help meet the need for specialization without having to travel to Boston or elsewhere.
  - **A high percent of local workers report being self-employed.**
    - Nearly 250 workers, 9% of all workers, report being self-employed.
    - This is higher than those who report being self-employed in the state and the nation.
    - Finding ways to support these self-employed individuals through trainings, helping them find space, access to capital, and networking/collaboration opportunities will be critical to expanding their work and financial feasibility.

In conclusion, the Town of Provincetown has a number of significant challenges when it comes to creating a more year-round, higher wage, diverse and therefore sustainable economy, including issues that are not traditionally considered to be economic development, such as housing. While the challenges are clear the specific solutions will not be easy, as they require an “impetus for change” among residents, property owners, and stakeholders. Provincetown is a beautiful community with many high quality of life attributes in a region (Cape Cod) with the same

strengths. While there are challenges, overall things are “not all that bad” for many property owners, residents and visitors. Therefore, education and engagement around clear and focused understanding and strategies will need to occur.



## Introduction

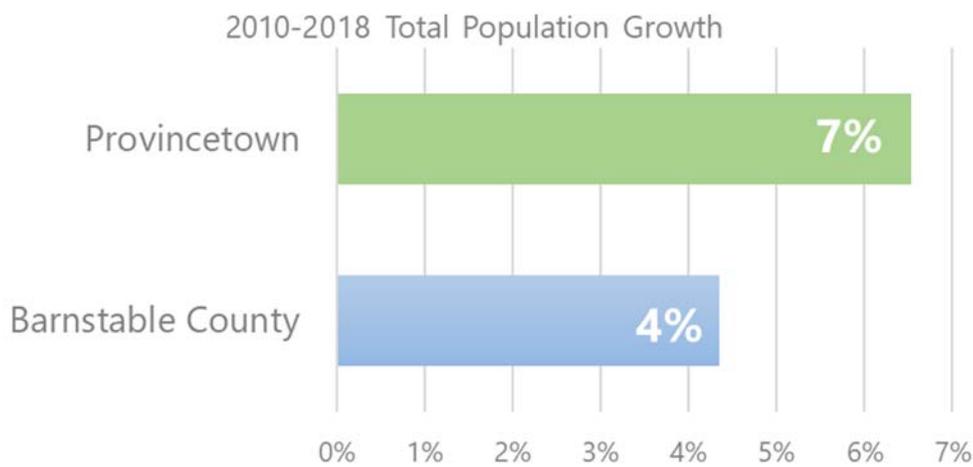
As a first step in crafting an Economic Development Strategic Plan, it is crucial to understand the basic socioeconomic factors that are impacting residents, businesses, and the opportunities for the future. The Public Policy Center at UMass Dartmouth conducted a thorough analysis of the economic factors that impact Provincetown in their report “A Baseline Assessment of Economic Conditions in Provincetown, Massachusetts” and so for this work a more concentrated analysis was conducted to understand how the demographics and industry trends impact opportunities in Provincetown. The following is a summary of the data collected in the previous reports with an eye towards how it impacts economic development in the region.<sup>1</sup>

## Demographics

### Population Growth

According to the Baseline Assessment, Provincetown and Cape Cod have both experienced notable population growth between 1970 and 2000; however, this was followed by a period of decline between 2000 – 2010 (UMass, 2017). Over the past eight years this trend has slightly reversed again. Within Provincetown, the population has grown since 2010. In 2010, about 2,940 people lived in the town and currently over 3,130 people reside in Provincetown. Within the town, the population grew at 7% over the past eight years, which is three percentage points higher compared to 4% growth in Barnstable County. This is good news for the town’s economy because despite the high levels of tourism, the increase in population shows **people are interested in staying in the town beyond just visiting for vacation and are able to find housing to be able to do so**. The trend of population growth in the town is projected to continue, growing by another 3% by 2023, adding an additional 80 residents.

Figure 1: 2010-2018 Total Population Growth in Town and County



### Age Distribution

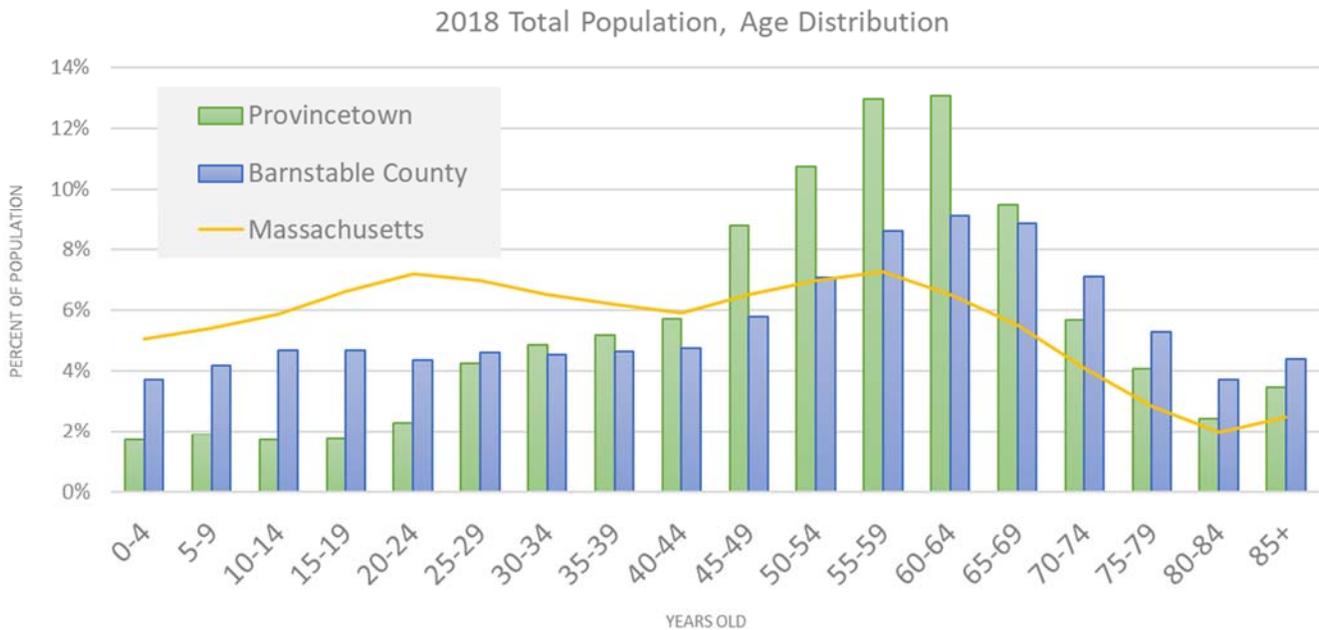
As noted, the population in the town is growing, however, the age distribution of residents is unique compared to that of the county and the state. In particular, the town has a much higher proportion of older residents. About 46% of residents are between the ages of 45 – 65, resulting in about **71% of the population being over 45 years old**, which is ten percentage points higher than the

Source: Esri, U.S. Census

<sup>1</sup> This analysis includes mostly data collected from the UMass Dartmouth Public Policy Center report with some additional data from proprietary data sources, such as EMSI.

county and 26 percentage points higher than the state. Compared to the Cape Regions (Upper, Mid, Lower, and Outer), as defined in the Baseline Assessment, the Outer Cape has the largest share of residents over the age of 45 at 70%, whereas the Upper Cape has the highest share of residents ages 24 and younger (UMass, 2017). Similarly, median age in Provincetown is two years older than Barnstable County, and 15 years older than across all of Massachusetts. **Catering to the needs and preferences of an older population is imperative for the success of Provincetown’s economy.**

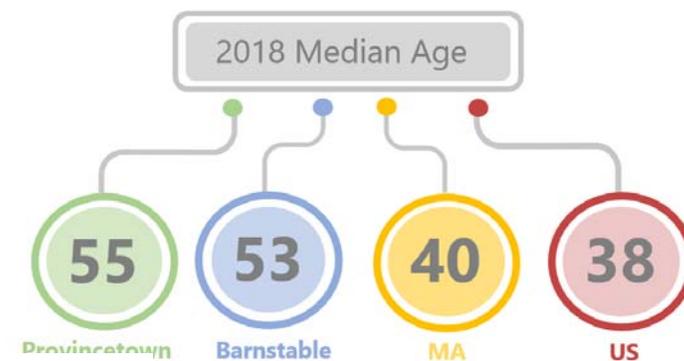
Figure 2: 2018 Total Population Age Distribution in the Town, County, and State



Source: Esri

Similarly, median age in Provincetown is two years older than Barnstable County, and 15 years older than across all of Massachusetts. **Catering specifically to the needs and preferences of an older population is imperative for the success of Provincetown’s economy.**

Figure 3: 2018 Median Age in the Town, County, State and US



Source: Esri

*Income*

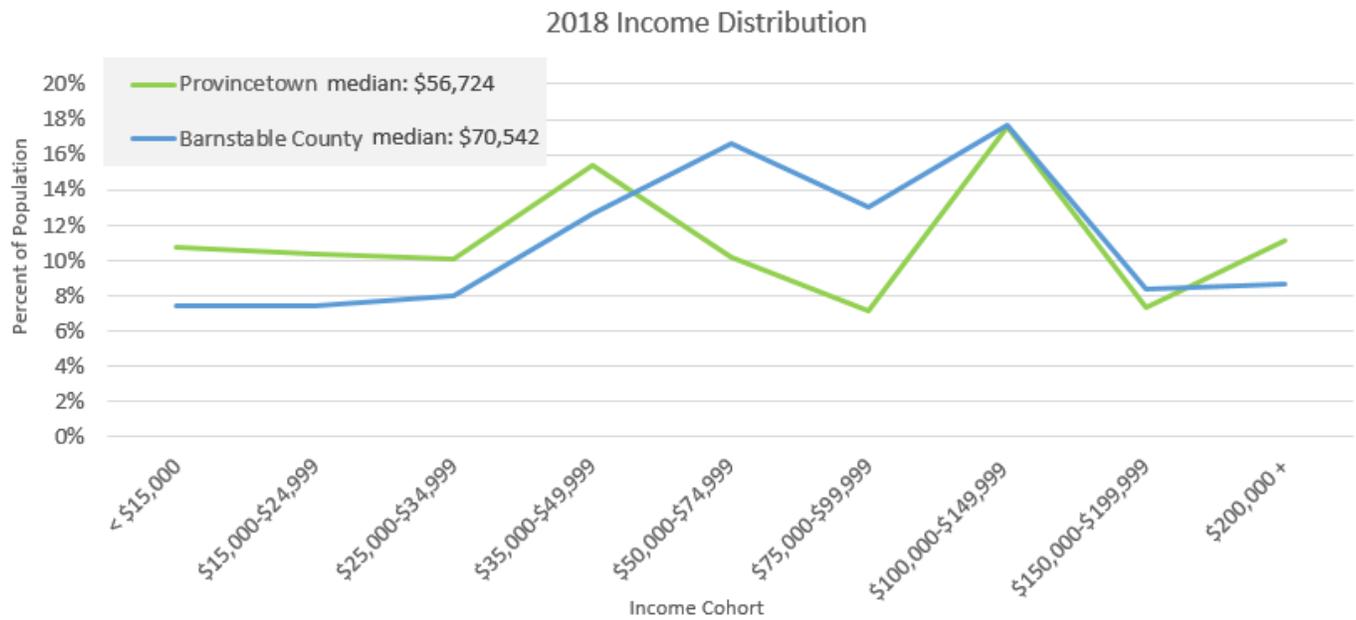
As noted in the Baseline Assessment, per capita income increased in Barnstable County by over 8% from 2000 to 2015, this is much higher than the increase of 3% across the state (UMass, 2017). Additionally, since 2009, the per



capita income of the Cape region has been slightly higher than MA and was over 2% higher than the MA per capita income in 2015 (UMass, 2017).

Currently, the median income in Provincetown is just under \$57,000; which is nearly \$14,000 lower than the median income of the county. As shown in the current income distribution, the percentage of the population with incomes ranging from \$50,000 - \$99,999 is higher in the county than in the town. Similarly, the percentage of the population earning less than \$15,000 - \$34,999 is notably higher in the town than the county. This is due in part to the high number of service-related tourism jobs within the accommodations, retail, and restaurant sectors.

Figure 4: 2018 Income Distribution for the Town and County



Source: Esri

### Educational Attainment

The population over the age of 25 in Provincetown is highly educated. As noted in the Baseline Assessment, a higher percentage of Barnstable County’s residents, 70%, have college experience, including some college, associates degrees, bachelor’s degrees, and graduate degrees, in comparison to Massachusetts at 64% (UMass, 2017). Additionally, Provincetown has an even higher percentage of residents with college experiences at 76%, six percentage points above the county and ten above the state (Esri). Within Provincetown, there is also a significant percentage of the population with graduate/professional degrees, over 23%, compared to just under 19% in the county.

As noted in the Baseline Assessment, within the town, the share of residents with a bachelor’s degree increased by over six percentage points from 2000 to 2015. Similarly, residents with a graduate or professional degree increased by over seven percentage points (UMass 2017). At the same time, the share of residents who did not complete high school decreased by 8.5 percentage points (UMass 2017).

## Tapestry Segmentation

In general, and on a national level, the population is sometimes described in different “tapestry segments,” in other words, groups of the population will have specific characteristics and preferences. Although not all people will resemble these characteristics, these segments are helpful generalizations to better understand tendencies on average, across the nation, of different population groups. As shown in the graphic below, the largest percentage of the population in Provincetown is considered Rural Resort Dwellers, at 36%, this comes as no surprise seeing as how the median age of this population group is just about 54 years old and have an affinity toward second homes. The four estimated population groups that are used to describe Provincetown have similarities. Firstly, two of the four population groups, Emerald City and Trendsetters, are called out specifically as being **socially and environmentally conscious**, therefore businesses in Provincetown should integrate this preference in selling goods, when possible. Secondly, three of four groups, Emerald City, Trendsetters, and Golden Years are labeled as technology-users, whether that be smartphones or at-home desktops, having **accessible and reliable broadband** in Provincetown is important to a majority of the population.

### Rural Resort Dwellers, 36%



**Median Age: 54.1**  
**Median HH Income: \$50,400**

Living mostly in owner-occupied, single-family homes, and strong market for second homes, valued near the US median. *Over half of the housing units are vacant due to a high seasonal vacancy rate.* 42% of households consist of married couples with no children at home, while another 28% are single person. Married couples with children at home have older school-age children. They're close to retirement, simplicity and modesty characterize residents.

### Emerald City, 26%



**Median Age: 37.4**  
**Median HH Income: \$59,200**

Residents mostly live in older, neighborhoods with homes built before 1960; about half of homes are renter-occupied. Median home value and average rent are slightly above the US levels. Single, nonfamily types make up over half of these households. Well-educated, environmentally friendly purchasers, conscious of nutrition, and avid cell phone users, describe this population. they enjoy arts, music, and learning new things.

### Trendsetters, 20%



**Median Age: 36.3**  
**Median HH Income: \$63,100**

Singles, living alone or with roommates or partners, more than 75% rent in upscale, multiunit structures. These residents are young and well educated; more than half have a bachelor's degree or more. Residents travel often, exploring destinations and experiences. Socially and environmentally conscious, they pay more for products that support their causes. Up-to-date on technology, they explore and exploit all the features of their smartphones.

### Golden Years, 18%



**Median Age: 52.3**  
**Median HH Income: \$71,700**

This older market has a median age of 52 years and nearly 32% of residents aged 65 years or older. Single-person households (over 40%) and married-couple families with no children (one-third) dominate these neighborhoods. These consumers are well connected: Internet access is used for everything from shopping or paying bills to monitoring investments and entertainment. They are generous supporters of the arts and charitable organizations.

### Characteristics Comparison

Compared to other regions similar in size to Provincetown, the number of Millennials (people between the ages of 20 – 34) is notably low, whereas people nearing retirement age (ages 65 and over) is notably high. **Although it will be important for Provincetown to position itself as a viable region for Millennials to live, it is equally if not more important for the town to focus effort and resources into serving the current demographic characteristics of the town.**

Figure 5: Population Metric Comparisons for the Town



Source: Esri

## Provincetown Housing Tenure



Source: Esri

## Housing

### Housing Tenure

Over the past 20 years, Provincetown has continued to have much higher housing costs than Barnstable County, Boston, and Massachusetts (UMass, 2017). Provincetown has a high percentage of vacant units throughout the year due to the town being a tourist-destination, at 60% compared to 40% in the county. Additionally, housing costs in the town are high compared to other regions in MA. According to UMass Dartmouth, in 2016, the median price per square foot was 121% higher than in Barnstable County and 150% higher than the state; costs in the town are even higher than in Boston by about 16%.

Provincetown, Massachusetts has seen some severe housing affordability challenges. With a current median household income of \$43,000, the median value of a single-family home is a disproportionate \$790,000.

Housing costs account for a significant percentage of household income. In Provincetown, 64% of renters spent over 35% of their income on rent in 2015,

which is about 14 percentage points higher than the number of renters spending that much of their income on rent across the state (UMass, 2017). **Furthermore, nearly 40% of renters spent over 50% of their income on rent** (UMass, 2017); this is over 20 percentage points higher than the traditional estimate of generally spending being no more than 30% of monthly income on housing. Housing costs are considered burdensome when they are above 35%, and the majority of Provincetown renters are spending that or higher (UMass, 2017). **According to data laid out in the Baseline Assessment, housing affordability in Provincetown has continued to worsen since 2010.**

Not only has affordability continued to be an issue, but, no significant change in the number of housing units occurred within the town between 2009 and 2015; during this time the only notable change was an increase in multi-unit buildings which was likely a result of condominium conversions (UMass, 2017). Since 2007, there have been over 720 condo conversions in the town (UMass, 2017). The Town recognizes this as a significant limitation and is taking steps to combat the issue. Recently, a report released by the Housing Assistance Corp., titled "Housing on Cape Cod: The High Cost of Doing Nothing," showed that the average rent for a room in a house was over \$700 a month, the average studio rent was around \$1,000 a month, and renting a three-bedroom home at nearly \$1,900 (Fraser, 2018). Much of the focus of the report was on workers who make too much to qualify for affordable-housing programs but not enough to afford market rents (Fraser, 2018).

The report noted that the Town is experiencing a shortage of housing that is negatively affecting the economy because employers struggle to both locate housing to attract new employees and keep current employees living on the Cape with reasonably priced housing options. The report notes that, labor shortage and increasing costs for paying workers higher wages, particularly at entry level jobs, equates to even higher costs for other goods and services like health care and for everyday goods (Fraser, 2018).

Because of the demand and town characteristics, Provincetown identified three categories of housing need, and has continued to create specific benchmarks within each of the following:

- **Affordable Housing:** to provide year-round housing for very low/low/moderate income individuals, at or below 50%, 65%, 80% of Area Median Income (Barnstable County AMI is ~\$77K). To date, 179 rental units and 46 owner units have been built, however, is a continued and growing demand.
- **Community Housing:** which provides year-round median/middle income – 80%-160%, of Barnstable County AMI. To date, 5 rental units and 8 owner units have been built for this purpose.
- **Seasonal Workforce Rental Housing:** this currently has no formal programs in place, but the Town is talking to businesses about strategies to implement in the future. This will be an imperative strategy in order to continue the growth and success of the tourism industry.

### *Housing Permits*

The following two tables show the number of housing unit building permits that were distributed per year, by unit type, within Provincetown and Barnstable County between 2010-2017. Note that cells showing a dash indicate no permits were issued. Within Provincetown, the number of housing unit building permits has kept a steady trend of 10 in total per year between 2014-2017. This however is much lower than previous estimates, between 31-46 during the years from 2010-2013. This is consistent with the common theme of lacking housing options in the town. The trend within Provincetown, however, does not mirror what is happening in the county. Instead, within Barnstable county, 2017 saw the highest number of housing unit permits distributed at over 870, this is up from between 400-640 between 2010-2016.

Table 1: Provincetown, Housing Unit Building Permits, 2012-2017

Provincetown, Housing Unit Building Permits, 2010-2017								
Type of Unit Structure	2010	2011	2012	2013	2014	2015	2016	2017
Single-Family	20	14	16	1	11	10	11	2
All Multi-Family	13	17	25	45	-	-	-	8
2-unit Multi-Family	-	-	-	2	-	-	-	8
3- and 4-unit Multi-Family	-	-	-	3	-	-	-	-
5+ Unit Multi-Family	13	17	25	40	-	-	-	-
Total Units	33	31	41	46	11	10	11	10

Source: HUD

Table 2: Barnstable County, Housing Unit Building Permits, 2012-2017

Barnstable County, Housing Unit Building Permits, 2012-2017								
Type of Unit Structure	2010	2011	2012	2013	2014	2015	2016	2017
Single-Family	381	342	410	425	530	550	495	489
All Multi-Family	37	62	182	171	110	22	10	382
2-unit Multi-Family	-	8	24	4	4	10	10	10
3- and 4-unit Multi-Family	3	7	28	59	15	6	-	-
5+ Unit Multi-Family	34	47	130	108	91	6	-	372
Total Units	418	404	592	596	640	572	505	871

Source: HUD

## Economy

### Top Industries by Employment

As noted in the Baseline Assessment, Provincetown is a summer tourist destination, and the economy in is highly seasonal. The number of Provincetown residents who are employed fluctuates 25% every year from about 1,600 in the winter, to about 2,000<sup>2</sup> in the summer (UMass, 2017). Provincetown’s economy is highly-reliant on seasonal tourism, this has a notable effect on the industries, occupations, and earnings by job in the town. The seasonal nature of work helps tourism-related industries thrive, however, can pose as a barrier to success for certain year-round professional industries that rely on a broad workforce and broad consumer base.

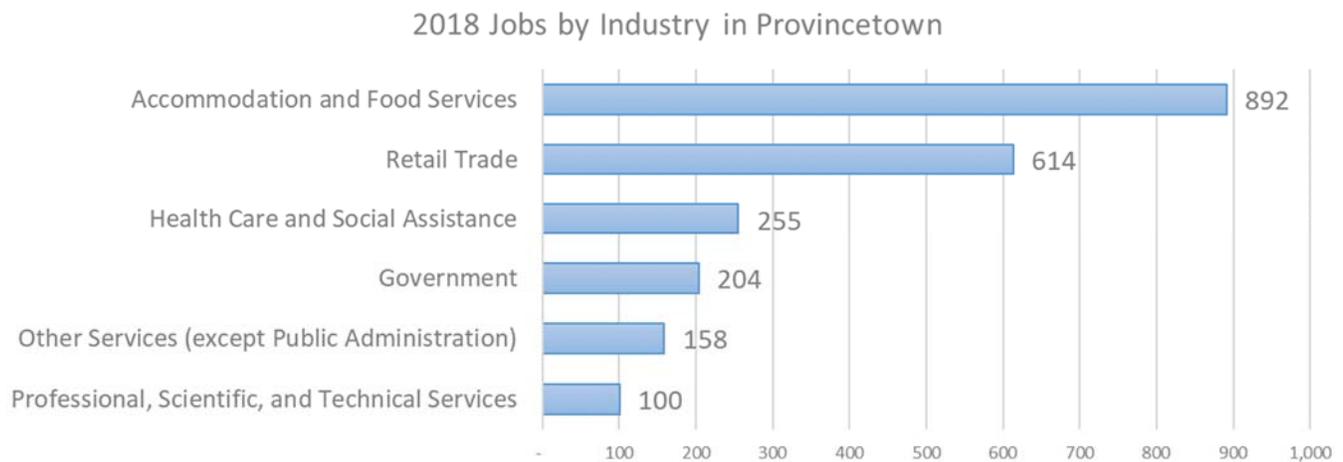
Currently, we estimate that there are just under 2,700 jobs located within Provincetown (employees may or may not be town residents). Six industries employ 100 workers or more in the town, with the largest industry employers being Accommodation and Food Services followed by Retail Trade, collectively employing over 1,500 workers. Also noted in the Baseline Assessment, the size of the tourism-related industry cluster is far larger than all other industry clusters in the town (UMass, 2017). Other industries of note include Health Care and Social Assistance; Government; Other Services;<sup>3</sup> and Professional Scientific and Technical Services. The occupations associated with the top

<sup>2</sup> Estimated within the Baseline Assessment created by UMass, monthly employment was measured between 2010-2017.

<sup>3</sup> According to the BLS, establishments engaged in providing services not specifically provided for elsewhere in the classification system. Establishments in this sector are primarily engaged in activities, such as equipment and machinery repairing, promoting or administering religious activities, grantmaking, advocacy, and providing dry-cleaning and laundry services, personal care services, death care services, pet care services, photofinishing services, temporary parking services, and dating services.

industries are mostly service-related occupations connected to the tourism sector, however, with notable growth in the health care sector, there is also growth in medical-related occupations as well (UMass, 2017).

Figure 6: 2018 Jobs by Top Industries in Provincetown



Source: EMSI

Health Care and Social Assistance accounted for over 250 jobs in 2018 and is projected to grow significantly, adding 44 jobs over the next five years. This trend is not unique to Provincetown. Many regions across the county are facing an increase in demand for Health Care and Social Assistance jobs. However, despite the commonality of this trend, it may be of more significance in the town due to the population age distribution. **The high proportion of older people living in the Provincetown will eventually mean a high demand for high-quality health care infrastructure.**

Considering an aging population and new innovations in the provision of health care, Provincetown may want to explore options in supporting a wide variety of health care options such as convenient care options. Small-scale, specialty clinics that provide convenient and low-cost care provide an alternative to a full-scale hospital facility. Supporting “telehealth” is a strategy for patients to access and increase self-care while potentially reducing office visits and travel time.<sup>4</sup> Embracing these health care alternatives can have positive impacts on quality of life and overall community health.

<sup>4</sup> Top 10 health care innovations, Deloitte

Since 2013, Provincetown has added just under 150 jobs, a 6% increase in growth. This trend is projected to slow over the next five years with only 23 jobs projected to be added, growing at a marginal 1%. As noted, the Health Care and Social Assistance industry is well-positioned for growth considering the age distribution of the town. Additionally, the Arts, Entertainment, and Recreation industry has shown steady growth over the past five years and is projected to continue growing. **Promoting growth in this industry would provide residents and visitors additional activity options both during summer seasons, and winter months.**

Table 3: Historic and Projected Jobs by Industries in Provincetown

Industries in Provincetown, 2013-2023								
NAICS	Description	2013 Jobs	2018 Jobs	2023 Jobs	2013 - 2018 Change	2013 - 2018 % Change	2018 - 2023 Change	2018 - 2023 % Change
72	Accommodation and Food Services	846	892	893	46	5%	1	0%
44	Retail Trade	611	614	589	3	0%	(25)	(4%)
62	Health Care and Social Assistance	211	255	284	44	21%	29	11%
90	Government	201	204	204	3	1%	-	0%
81	Other Services (except Public Administration)	159	158	165	(1)	(1%)	7	4%
54	Professional, Scientific, and Technical Services	96	100	101	4	4%	1	1%
71	Arts, Entertainment, and Recreation	77	84	89	7	9%	5	6%
53	Real Estate and Rental and Leasing	60	69	71	9	15%	2	3%
48	Transportation and Warehousing	46	60	58	14	30%	(2)	(3%)
52	Finance and Insurance	55	60	61	5	9%	1	2%
51	Information	51	47	42	(4)	(8%)	(5)	(11%)
56	Administrative and Support and Waste Management and Remediation Services	47	47	47	-	0%	-	0%
11	Agriculture, Forestry, Fishing and Hunting	17	32	37	15	88%	5	16%
23	Construction	21	24	24	3	14%	-	0%
42	Wholesale Trade	19	16	16	(3)	(16%)	-	0%
	<b>Total</b>	<b>2,526</b>	<b>2,673</b>	<b>2,696</b>	<b>147</b>	<b>6%</b>	<b>23</b>	<b>1%</b>

Note: Only industries employing 10 people or more are shown in the table

Source: EMSI

As noted in the Baseline Assessment, in addition to a strong tourism sector and growing health care sector, Provincetown is also strong in transportation and warehousing. The LQ in this sector is 37.0 showing significant concentration, which can be attributed to the municipal airport (UMass, 2017).

Also noted in the Baseline Assessment, the top five fastest growing industry clusters include (1) Hospitality and Tourism, (2) Marketing, Design & Publishing, (3) Business Services, (4) Financial Services, and (5) Distribution & Electronic Equipment (UMass, 2017). Cumulatively, these clusters added about 50 jobs between 2010 – 2015 (UMass, 2017).

#### Self-Employment in Provincetown

Within the town, nearly 250 individuals, 9% of all workers, report being self-employed. the percentage of self-employed workers compared to all workers is higher in Provincetown than in the state and the nation, both with 6% of workers reporting as self-employed. Within the town, industries with the highest number of self-employed

workers include Retail Trade with 50 workers, Other Services (except Public Administration) with 34, and Professional, Scientific, and Technical Services with 27 workers. Within the town there is a significant number of self-employed workers in Agriculture, Forestry, Fishing and Hunting, which was also noted as an industry of specialization in the town, according to the Baseline Assessment.

Table 4: Self-Employed Workers by Industry in Provincetown, The State, and the US

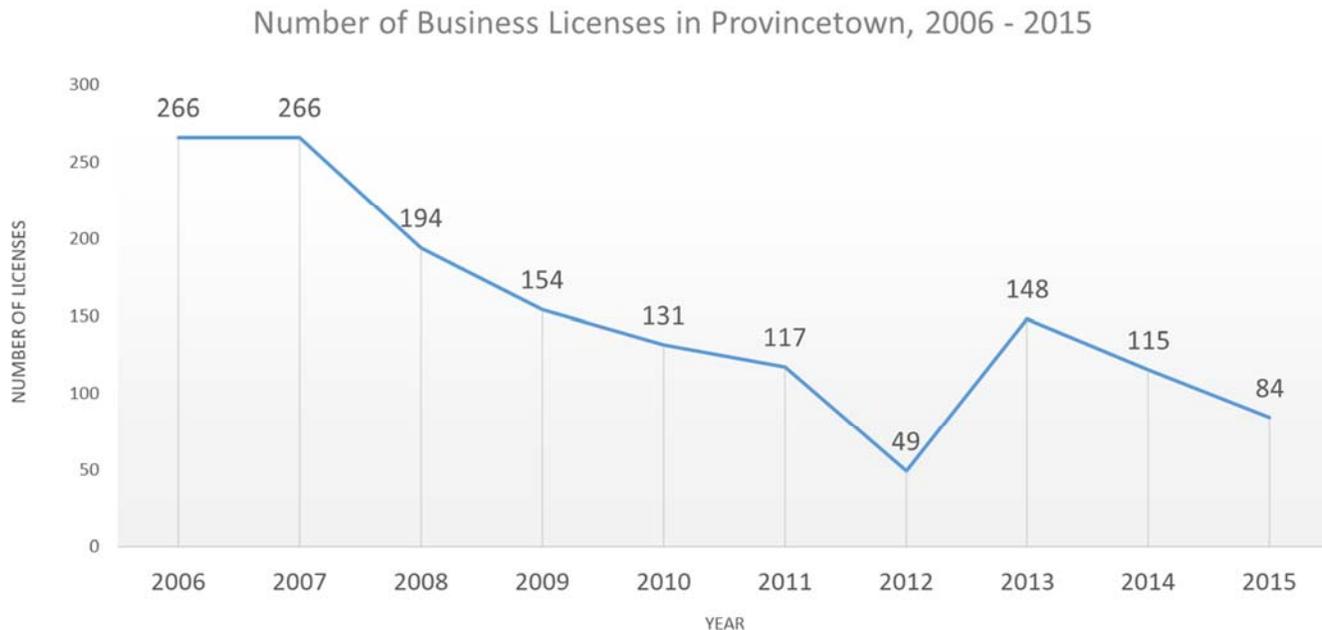
Self-Employed Workers by Industry in Provincetown Compared to State and Nation, 2018					
NAICS 2-digit	Description	Self-Employed Workers	Percent Self-Employed	MA Percent Self-Employed	USA Percent Self-Employed
11	Agriculture, Forestry, Fishing and Hunting	23	72%	28%	27%
71	Arts, Entertainment, and Recreation	23	27%	18%	17%
54	Professional, Scientific, and Technical Services	27	27%	12%	12%
56	Administrative and Support and Waste Management and Remediation Services	12	25%	9%	9%
53	Real Estate and Rental and Leasing	16	24%	19%	18%
51	Information	10	22%	3%	6%
81	Other Services (except Public Administration)	34	22%	22%	23%
62	Health Care and Social Assistance	22	8%	4%	4%
44	Retail Trade	50	8%	3%	4%
72	Accommodation and Food Services	11	1%	1%	2%
	<b>Total</b>	<b>248</b>	<b>9%</b>	<b>6%</b>	<b>6%</b>

Note: Only industries with 10 or more self-employed jobs in the Provincetown in 2018 are shown

Source: Emsi

According to the Baseline Assessment, the Town has approved just over 1,500 new business licenses between 2006 – 2015 (UMass, 2017). A notable portion of business licenses, 35%, were awarded within the first two years, 2006 and 2007. Both years saw 266 new business licenses approved. In 2012, the Town experienced an all-time low in approvals at only 49, this was followed by an increase to nearly 150 in 2013. However, since 2013, the number of new approved business licenses has been on the decline (UMass, 2017).

Figure 7: Number of Business Licenses in Provincetown, 2006-2015



Source: UMass Baseline Assessment

Of new business licenses in 2014 and 2015, the largest number, at 69 licenses, were awarded to businesses operating in transportation, which demonstrates the small businesses supporting the Transportation and Warehousing industry (UMass, 2017). This was followed by retail licenses at 45, and food services licenses at 33 (UMass, 2017). These business licenses can likely be attributed to the tourism-related industry.

As of 2015, there were just over 790 people both living and working within Provincetown. There were an additional nearly 760 individuals employed in Provincetown but living somewhere outside of the town, and an additional 600 people living in Provincetown and employed somewhere outside of the town. This commuter inflow and outflow is depicted below. (Please note: arrows do not indicate exact direction, instead indicate general inflow and outflow.) Noted in the Baseline Assessment, Barnstable County residents who are employed elsewhere earn higher wages than outside workers employed within the region, while people working and living in Barnstable County earn wages lower than both groups (UMass, 2017). Similarly, Workers who are employed in Provincetown but live outside, earn more than residents of Provincetown working within the town and elsewhere (UMass, 2017). This can be due in part to the large number of service-related occupations that serve the tourism industry. In addition, people living in Barnstable County but are employed elsewhere earn higher wages than those who are living outside of the county but working within the county (UMass, 2017). Comparatively, people living and working within Barnstable County earn lower wages than both groups (UMass, 2017). **Due in part to commuter inflow and outflow, high median age, and high educational attainment level of people living within Provincetown, coupled with the strong tourism economy, we infer that Provincetown is exporting skilled workers in professional industries and importing unskilled workers to support accommodations, food services, and retail.**

Figure 8: Commuter Inflow and Outflow, Provincetown



The majority of residents, approximately 61%, within the town traveling from home to work, travel less than 10 miles to work. However, there is a notable percentage of people, 17%, who travel over 50 miles to work.

Similarly, the majority of workers, approximately 58%, within the town traveling from work to home, travel less than 10 miles to work. However, there is an even spread between having 13% travel between 10 -24 miles, 15% between 25 – 50 miles and 14% traveling over 50 miles.

Figure 9: Provincetown Jobs by Direction, Home to Work, 2015

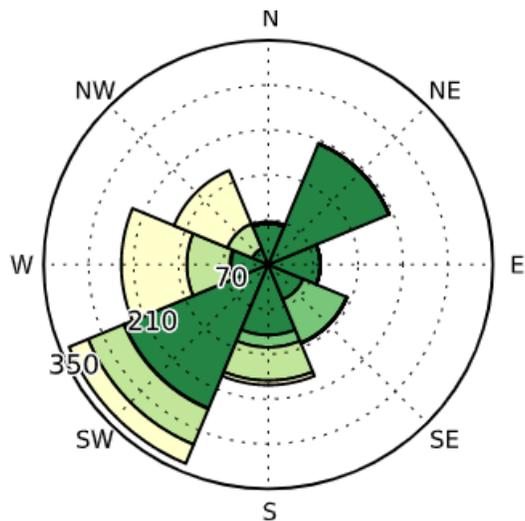


Table 5: Provincetown Jobs by Distance, Home to Work, 2015

Jobs by Distance - Traveling from Home to Work, 2015		
	Count	Share
Less than 10 miles	846	61%
10 to 24 miles	95	7%
25 to 50 miles	222	16%
Greater than 50 miles	234	17%
<b>Total</b>	<b>1,397</b>	<b>100%</b>

Source: Census OnTheMap

Source: Census OnTheMap

Table 6: Provincetown Jobs by Distance, Work to Home, 2015

Jobs by Distance - Traveling from Work to Home, 2015		
	Count	Share
Less than 10 miles	893	58%
10 to 24 miles	207	13%
25 to 50 miles	227	15%
Greater than 50 miles	223	14%
Total	1,550	100%

Source: Census OnTheMap

As noted in the Baseline Assessment, employment interchange levels between Provincetown and other communities is high, particularly in Truro, Wellfleet, Barnstable, Boston, and Eastham (UMass, 2017). Knowing commuting patterns of workers and employment interchange levels would suggest that shared services among the regional communities could generate efficiencies for residents, workers, and visitors alike.

Despite exporting skilled workers, the labor force participation rate in the town was high in 2016, reaching just over 63%, this is over three percentage points higher than the county. Oppositely, the unemployment rate in the town was notable higher than the county and state at nearly 9% in 2016. **This may indicate that more people living in Provincetown would pursue the opportunity to work in Provincetown if the option became available.**

Table 7: Economic Indicators, 2016

Economic Indicators, 2016		
	Labor Force Participation Rate	Unemployment Rate
Provincetown	63.2%	8.9%
Barnstable County	60.0%	6.3%
Massachusetts	67.5%	6.8%

Source: American Community Survey (ACS) 1-year estimates, Table S2301

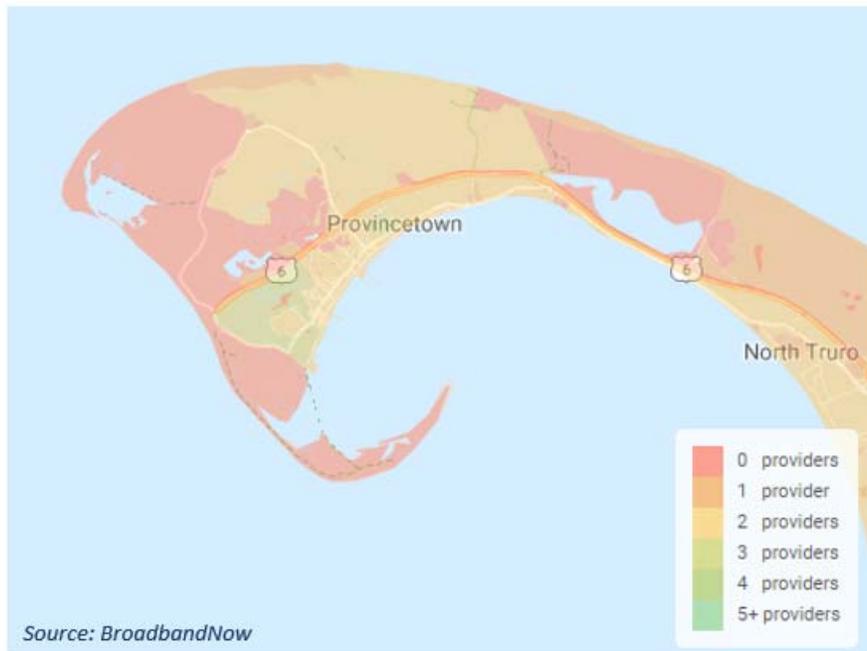
### Taxes

The Baseline Assessment reports that inflation-adjusted sales, room, and meals tax payments have consistently increased over time, suggesting that tourism is increasing, prices are rising faster than inflation or possibly both (UMass, 2017). Also, according to the Baseline Assessment, state tax collections show a consistent increase from 2004 – 2014. Consistent with other data displaying the seasonality of Provincetown’s economy, more sales are made in the summer months than others (UMass, 2017). Additionally, offseason sales have increased at an average annual growth rate of nearly 7%, while sales increase at an average annual growth rate of nearly 5% during peak months (UMass, 2017). The increase in sales during off-peak months shows potential for honing winter-tourism.

Broadband

**To provide for both business endeavors and resident preferences, it is imperative that Provincetown have adequate broadband coverage.** As shown in the map image below, a large portion of the town has access to between one and two internet providers, however, some portions of the town do not have access to any residential internet providers. For those who do have access, the average download speed in Provincetown is 49.39 Mbps which is about 10% faster than the average in Massachusetts and 20% faster than the national average, according to BroadbandNow.

Figure 10: Internet Providers, Provincetown



## Attachment A: Data Sources

### Proprietary Data Sources



#### Economic Modeling Specialists International (EMSI)

To analyze the industrial makeup of a study area, industry data organized by the North American Industrial Classification System (NAICS) is assessed. Camoin Associates subscribes to Economic Modeling Specialists Intl. (EMSI), a proprietary data provider that aggregates economic data from approximately 90 sources. EMSI industry data, in our experience, is more complete than most or perhaps all local data sources (for more information on EMSI, please see [www.economicmodeling.com](http://www.economicmodeling.com)). This is because local data sources typically miss significant employment counts by industry because data on sole proprietorships and contractual employment (i.e. 1099 contractor positions) is not included and because certain employment counts are suppressed from BLS/BEA figures for confidentiality reasons when too few establishments exist within a single NAICS code.



#### Esri Business Analyst Online (BAO)

ESRI is the leading provider of location-driven market insights. It combines demographic, lifestyle, and spending data with map-based analytics to provide market intelligence for strategic decision-making. ESRI uses proprietary statistical models and data from the U.S. Census Bureau, the U.S. Postal Service, and various other sources to present current conditions and project future trends. Esri data are used by developers to maximize their portfolio, retailers to understand growth opportunities, and by economic developers to attract business that fit their community. For more information, visit [www.esri.com](http://www.esri.com).



#### CoStar

CoStar is the leading source of commercial real estate intelligence in the U.S. It provides a full market inventory of properties and spaces—available as well as fully leased—by market and submarket. Details on vacancy, absorption, lease rates, inventory, and other real estate market data are provided, as well as property-specific information including photos and floor plans. CoStar covers office, retail, industrial, and multifamily markets. CoStar data is researched and verified by the industry's largest professional research team. With 1,200 researchers and 130 field research vehicles, CoStar's team makes calls to property managers; reviews court filings, tax assessor records and deeds; visits construction sites; and scans the web to uncover nearly real-time market changes. More at [www.costar.com](http://www.costar.com).



#### IBISWorld

IBISWorld is one of the world's leading publishers of business intelligence, specializing in industry and procurement research. Through its detailed industry reports available at 5-digit NAICS level, IBISWorld provides insight into market conditions for targeted industries, helps to identify major suppliers or supply chain, and provides an understanding of competitor activity. More at [www.ibisworld.com](http://www.ibisworld.com)

## Public Data Sources



### American Community Survey (ACS), U.S. Census

The American Community Survey (ACS) is an ongoing statistical survey by the U.S. Census Bureau that gathers demographic and socioeconomic information on age, sex, race, family and relationships, income and benefits, health insurance, education, veteran status, disabilities, commute patterns, and other topics. The survey is mandatory to fill out, but the survey is only sent to a small sample of the population on a rotating basis. The survey is crucial to major planning decisions, like vital services and infrastructure investments, made by municipalities and cities. The questions on the ACS are different than those asked on the decennial census and provide ongoing demographic updates of the nation down to the block group level. For more information on the ACS, visit <http://www.census.gov/programs-surveys/acs/>



### OnTheMap, U.S. Census

OnTheMap is a tool developed through the U.S. Census Longitudinal Employer-Household Dynamics (LEHD) program that helps to visualize Local Employment Dynamics (LED) data about where workers are employed and where they live. There are also visual mapping capabilities for data on age, earnings, industry distributions, race, ethnicity, educational attainment, and sex. The OnTheMap tool can be found here, along with links to documentation: <http://onthemap.ces.census.gov/>.

## Economic Census

The Economic Census is the U.S. Government's official five-year measure of American business and the economy. It is conducted by the U.S. Census Bureau for years ending in '2' and '7'. The Economic Census is the most comprehensive source of information about American businesses from the national to the local level. Published statistics cover more than 1,000 industries, 15,000 products, every state, over 3,000 counties, 15,000 cities and towns, and Puerto Rico and other U.S. Island Areas. More at: <https://www.census.gov/programs-surveys/economic-census/about.html>.

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## Attachment 3: Community Survey Findings



# Community Survey Responses: Town of Provincetown, MA

January 9, 2019

Prepared for:

Town of Provincetown  
Town Hall  
260 Commercial Street  
Provincetown, Massachusetts, 02657



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## About Camoin Associates

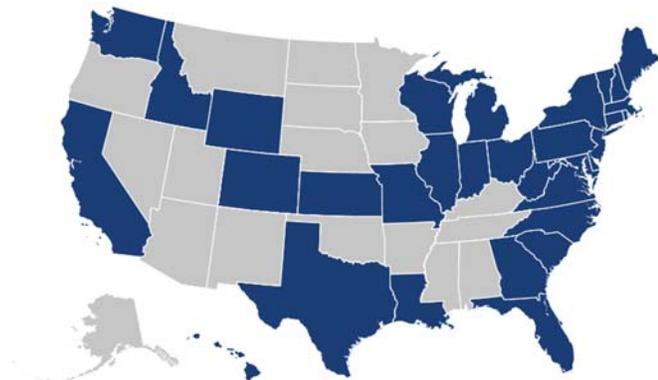
Camoin Associates has provided economic development consulting services to municipalities, economic development agencies, and private enterprises since 1999. Through the services offered, Camoin Associates has had the opportunity to serve EDOs and local and state governments from Maine to California; corporations and organizations that include Lowes Home Improvement, FedEx, Amazon, Volvo (Nova Bus) and the New York Islanders; as well as private developers proposing projects in excess of \$6 billion. Our reputation for detailed, place-specific, and accurate analysis has led to projects in 32 states and garnered attention from national media outlets including *Marketplace* (NPR), *Forbes* magazine, *The New York Times* and *The Wall Street Journal*. Additionally, our marketing strategies have helped our clients gain both national and local media coverage for their projects in order to build public support and leverage additional funding. We are based in Saratoga Springs, NY, with regional offices in Portland, ME; Boston, MA; Richmond, VA and Brattleboro, VT. To learn more about our experience and projects in all of our service lines, please visit our website at [www.camoinassociates.com](http://www.camoinassociates.com). You can also find us on Twitter [@camoinassociate](https://twitter.com/camoinassociate) and on [Facebook](https://www.facebook.com/camoinassociate).

## The Project Team

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## Overview and Key Findings

A survey was made available to community members in Provincetown to gather information to complement the Economic Development Strategy for the town. The survey focused on Provincetown's assets and constraints within the business, industry, and economic development realm. Respondents highlighted key actions and concerns that need to be addressed in the Town's new strategy. Additionally, respondents were provided the opportunity to offer their candid feedback on pertinent information for the community and economic development in the Town of Provincetown.

In total there were 269 survey respondents, of which 186 (69%) identified Provincetown as their primary residence ("primary residents"). Of the respondents who are not primary residents of the town, 71% were from New England ZIP codes. Two-thirds of the respondents own their homes in Provincetown. On average, respondents have lived in Provincetown for 14.3 years. Nearly all (99%) primary residents spend over 50% of the year in the town.

The following is a summary of the key facts gathered from the survey:

- Provincetown's greatest assets are History, Arts, Culture; Natural Resources; and Location. Combined, these assets position Provincetown to attract an array of visitors. Additionally, these assets can be further leveraged to attract workers and businesses into the area.
- The industry mix of respondents represented businesses that serve visitors as well as residents. The top industries represented in the survey were Accommodations, Retail, and Arts or Cultural.
- Tourism was listed as the most important industry for the future of Provincetown. In general, respondents view tourism as a major opportunity for Provincetown and would like to expand the tourism markets through targeted visitation and building a year-round tourism industry.
- Currently, the greatest constraints to the future economic sustainability of Provincetown are Housing Costs and Housing Availability. Similarly, Housing ranks as the most critical factor for economic well-being. Respondents noted the current state of workforce housing as a hinderance to economic growth. Providing adequate and affordable options would allow the local labor market to expand and perhaps attract key businesses to the area.
- In general, infrastructure upgrades for telecommunications and broadband as well as water and sewer are supported by the community. Financial assistance programs such as revolving loan funds and grant programs also rank among the top supported areas of economic development.

### COMMUNITY SURVEY

**269**

Total Respondents

**69%**

of Respondents were Primary Residents of Provincetown

**67%**

of Provincetown Residents Own Their Homes

**14.3**

Average Years Residents Have Lived in Provincetown

**99%**

of Primary Residents Spend the Majority of the Year in Provincetown

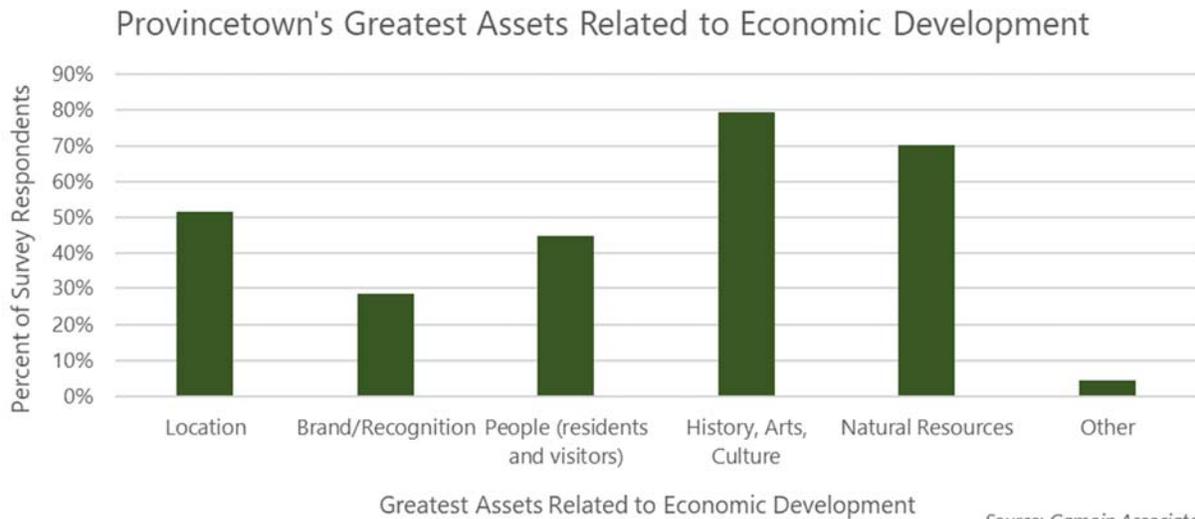
**71%**

of Respondents Who Do Not Live Primarily in Provincetown are from New England



## Provincetown Assets

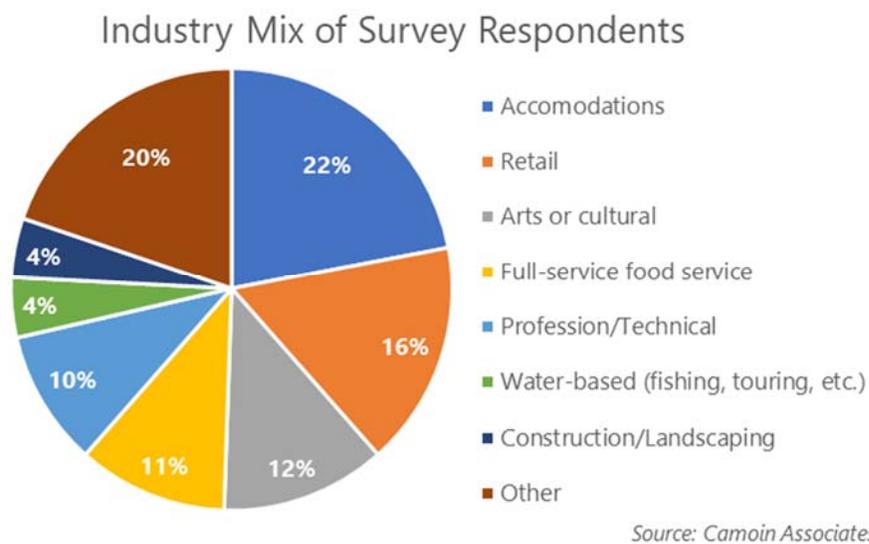
When asked to select three of Provincetown's greatest assets related to economic development, the number one response was History, Arts, Culture with 79% of the responses. Natural Resources, Location, and People (residents and visitors) followed with 70%, 52%, and 45% of responses. Approximately 4% of respondents provided a write-in response, represented as "Other" on the chart and include restaurants, access to talent, potential of telecommunications, tourism, and LGBTQ (lesbian, gay, bisexual, and transgender) population that visits the area.



## Business and Industry

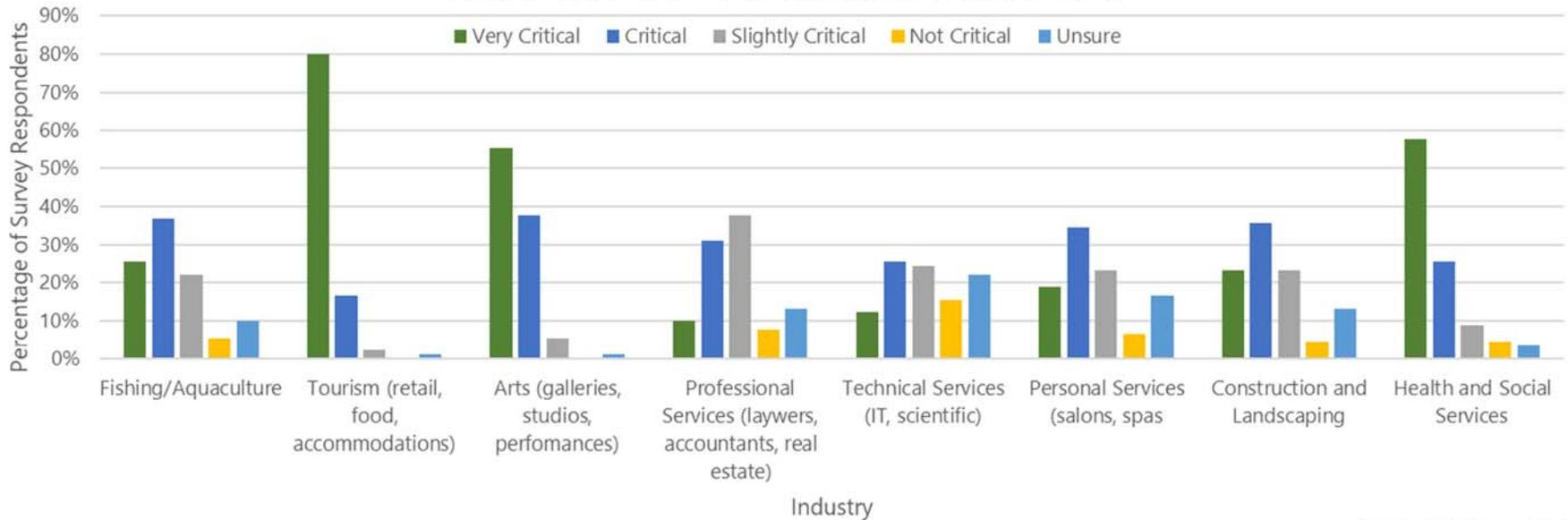
Of the 269 total respondents, 91 (66.2%) own or manage a business in Provincetown. Businesses range from newly opened to being in operation for 36 years. On average, these businesses have been open for 11.2 years.

The industry mix of respondents that own or manage a business in Provincetown is 22% Accommodations, 16% Retail, 12% Arts or cultural, 11% Full-service food service, 10% Profession/Technical, 4% Water-based (fishing, touring, etc.), 4% Construction/Landscaping, and 19% Other. Other industries that were written-in include bar, cleaning, media, salon and spa.



Survey respondents were asked to rate industries on how critical they are for the future of Provincetown. The figure below displays the responses for each industry. Tourism, including retail, food, and accommodations, ranked as the most critical industry for the future of Provincetown, with 80% of respondents ranking it as “Very Critical” and no respondents listing it as “Not Critical”. The majority of respondents ranked Health and Social Services and Arts as “Very Critical”. Professional Services, including lawyers, accountants, and real estate, ranked as the least critical industry in comparison to the other industries.

Critical Industries for the Future of Provincetown

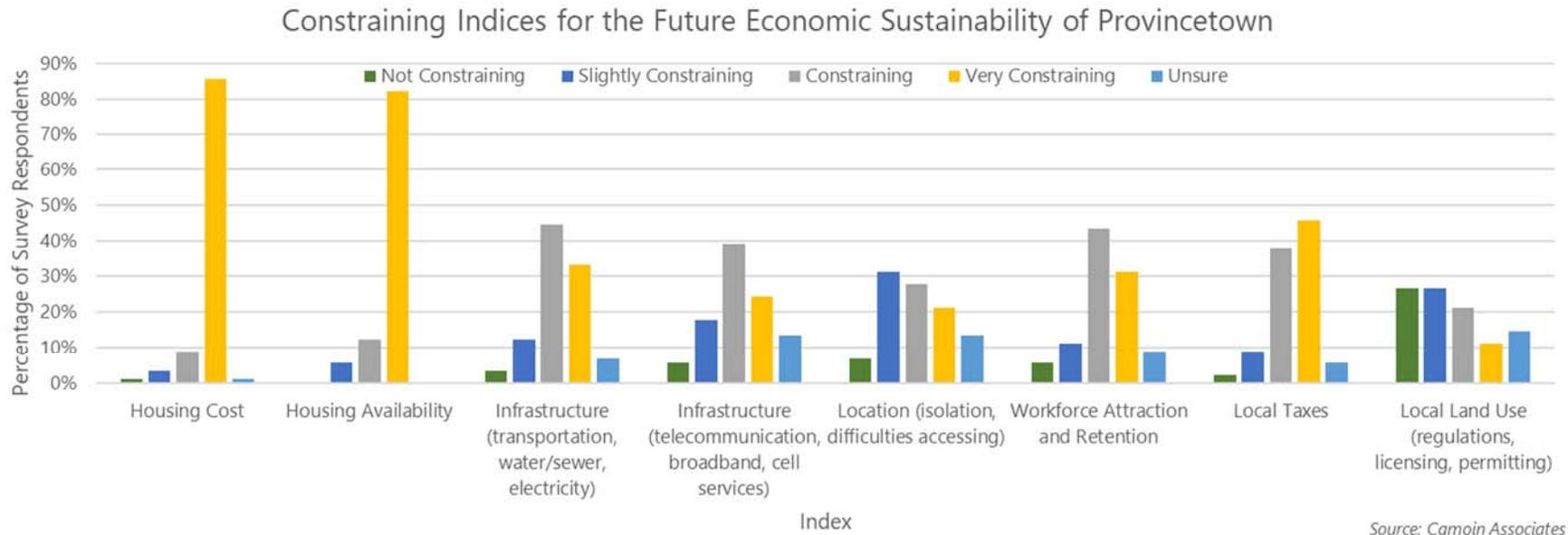


Source: Camoin Associates



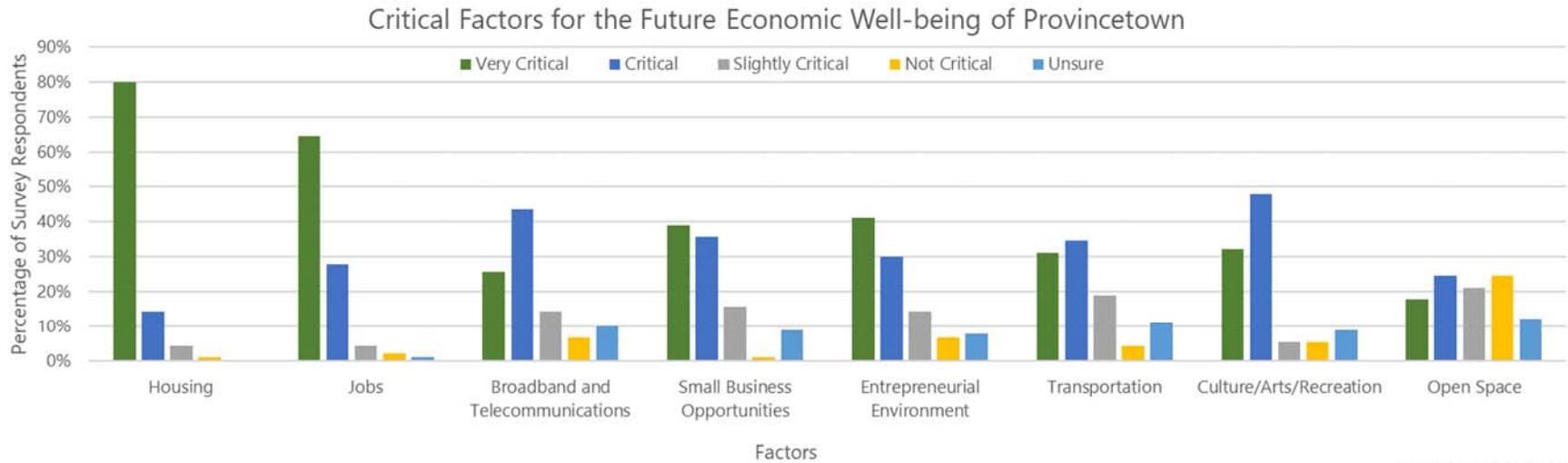
## Constraints

Housing Costs and Housing Availability are among the top constraints to the future economic sustainability of Provincetown with 86% and 82% of respondents deeming each index as “Very Constraining.” On the other hand, Local Land Use including regulations, licensing, and permitting is the least constraining factor with 27% of respondents deeming it “Not Constraining.”



## Critical Factors

Housing was listed as the most critical factor for the future economic well-being of Provincetown with 80% of respondents deeming it “Very Critical.” Jobs was the second most critical factor with 64% of respondents marking it as “Very Critical.” Conversely, Open Space was significantly less critical with 24% of respondents listing it as “Not Critical.”



Source: Camoin Associates

## Supported Areas for Economic Development

The figure on the right displays the top supported areas of economic development by percentage of survey respondents. The top supported areas for economic development were infrastructure upgrades specific to telecommunications and broadband improvements, financial assistance programs, and infrastructure upgrades to water and sewer with 41%, 38%, and 38% of respondents respectively.

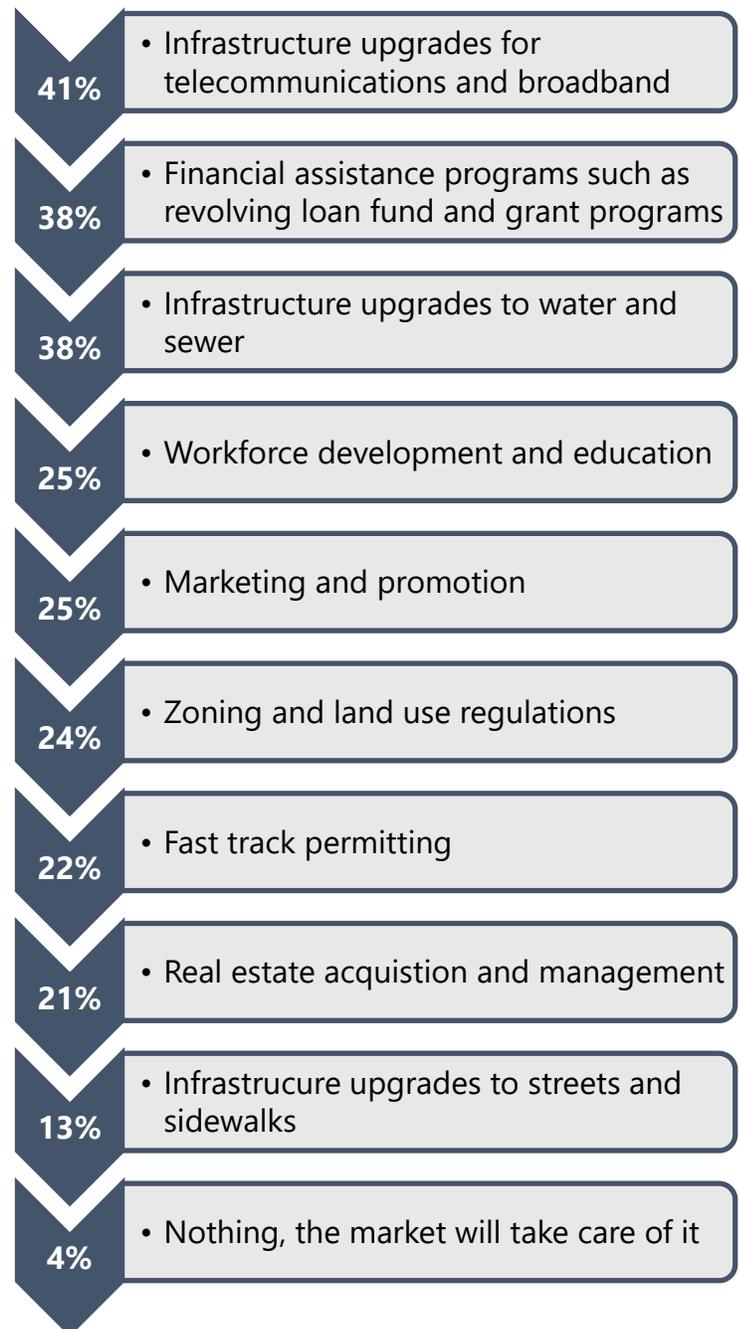
Conversely, 4% of respondents supported the idea that the market will take care of economic development. Additionally, 2% of respondents believed the Town should not allocate additional resources to economic development. Technical assistance programs was the only survey option that received zero votes.

## Additional Considerations

In addition to structured questions, respondents were provided the opportunity to provide feedback that they saw as pertinent to the community and economic development in the Town of Provincetown. Feedback included concerns, recommendations, and suggestions, which are summarized below.

- A number of respondents noted that housing, specifically a lack of workforce housing, was a hinderance to the Provincetown economy and noted as the town's most critical need. The lack of affordable housing creates pressure on the local labor pool creating a lack of middle-class jobs.
- The theme of business attraction and job creation was closely tied to the concept of workforce housing. Many respondents believe the community needs to fund and further develop workforce housing to attract professionals. Business attraction in general should focus on science and technology, telecommuting, and alleviating permitting and funding costs for businesses in the area.
- The tourism industry highlighted several opportunities for respondents as well as one concern regarding tour buses and cruises degrading the town. Respondents were interested in tourism metrics for the economy, attracting more LGBTQ visitors, and building a year-round tourism industry. Tourism jobs were viewed as providing stable employment within the community.

## Top Supported Areas for Economic Development by Percentage of Respondents



- Respondents noted that accountability and a clear delineation of roles and responsibilities is needed to further economic development.
- Concerns over drug use and homelessness were also noted. Working to address these issues, real and perceived, will help to create a more vibrant sense of place for Provincetown residents and visitors.

*Please note that not all responses are included in the bullets above, however, each response was taken into consideration for future economic development planning.*

## Survey Comments

This section provides the comments “as-is” received in the survey.

- Bring a university to the town - we have a huge untapped resource in retired teachers here. Supply housing for students and many will stay all summer and replace seasonal workers, flattening out the housing demand curve.
- Absolutely anything that builds year round tourism helps the town by providing stable employment.
- Accountability of Financial Decisions
- Affordable year round and seasonal housing is becoming a critical issue for Provincetown. The added cost of business to provide discounted housing to entice employees is a great burden. In addition the lack of affordable year round housing means a much smaller local labor pool. These are the biggest economic challenges facing this town
- Allow greater ease for local businesses to permit and get Town funds more easily whether as grants or low interest loans. Maybe continue to use the 3% CPC surcharge after 2020 for such a pool from which to draw for this.
- build for families!
- Get a clue on how many ppl are homeless this winter.
- It is critical for us to look at more sustaining businesses that bring professional level individuals to live and work in Provincetown. Be a destination for science and tech.
- It really unclear what permits a business needs and you get different answers from each person at town hall - there should be a simple checklist and flow chart!
- Need a commitment to town. Most people are self serving and looking to the value of their property to cash out. Not clear at town hall Who is actually responsible for results.
- Need more seasonal and year round rentals! Hello! ;)
- Not everything is housing
- Please provide real metrics about the role of Tourism in our economy. Please help attract new business to Provincetown to fill vacancies in addition to higher level goals.
- SPEND THE \$\$ ON ATTRACTING THE HIGHEST VISITOR RATIO EG LGQT
- Stop bringing in tour buses and cruise ships. It is ruining the town
- streamlining and fast tracking essential to future sustainability
- The business community needs to fund/develop workforce housing.



- The drug problem -specifically the meth problem- needs to be addressed and enforced. We are at a critical tipping point, and if left unattended, will cripple our economy in parts. It could affect and implode our town's tourist economy and more. It's been said that "Provincetown is the place to go to get annihilated." Also have heard, "Meth is the new AIDS." The problem is rampant in our Town in season. We don't have enough responders to deal with the escalating problem. One drugged out person could set this town on fire. I suggest we pull together a group of concerned citizens to work collaboratively: from our town government, school system, local and state police, civic and faith organizations, parent groups, youth and adult group leaders; retail & gallery & hospitality; local Support Groups, everyone! If not addressed, it could bring this town down literally. Thank you for listening.
- The issue for the town is what is the pathway to regular full-time well-paying jobs on the outer cape? This isn't a Provincetown specific problem, as no town can do this alone. The issue is regional. This is a remote, rural location, bounded by National Seashore that can never be developed. The town doesn't even have drinking water of its own. Housing and living costs will always be high. Given those constraints, what sort of businesses can develop here? And the elephant in the room is, do people who live here even want full-time, year-round jobs with two to three weeks of vacation a year anyhow? Side note: telecommuting jobs are mostly advanced and require high levels of education. Those are not going to even out the lopsided economic distribution of the town, they will just feed what it already is. There is no effective middle-class here because that's where the jobs are lacking and that's where the effort needs to concentrate.
- The town needs to address climate change and mitigation for the town. This could be a job opportunity but we should have real plans and work on this
- The town needs to provide workforce housing since the town's economy so heavily relies upon seasonal businesses to service the visiting and year round population.
- The town should invest time and money in regional answers to economic development challenges. Housing and workforce transportation from Eastham-Provincetown should be part of the solution.
- This survey was good in many ways but given P-town is a part of considerable local, regional, and global desire, overlooking or excluding one of the most important water dependent areas, with clear publicized interest expressed by the public, the drafters have failed in their responsibility to the public.
- We need to create some tech type facility (remote assistance / telecommuting / service/support type location to encourage businesses to view our location and workforce as a place to open a center
- Workforce housing is the most critical need.

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# Town of Provincetown Housing Strategies

July 2019

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## About Camoin 310

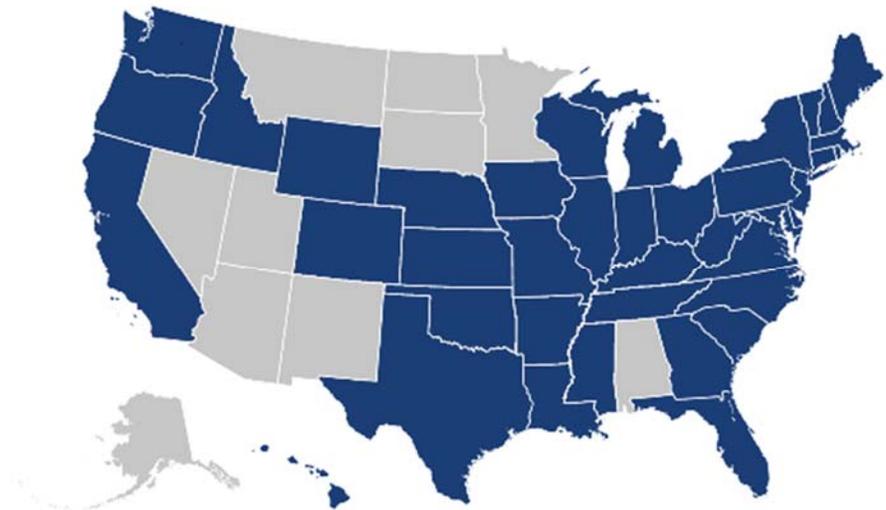
Camoin 310 has provided economic development consulting services to municipalities, economic development agencies, and private enterprises since 1999. Through the services offered, Camoin Associates has had the opportunity to serve EDOs and local and state governments from Maine to California; corporations and organizations that include Lowes Home Improvement, FedEx, Amazon, Volvo (Nova Bus) and the New York Islanders; as well as private developers proposing projects in excess of \$6 billion. Our reputation for detailed, place-specific, and accurate analysis has led to projects in 40 states and garnered attention from national media outlets including Marketplace (NPR), Forbes magazine, The New York Times and The Wall Street Journal. Additionally, our marketing strategies have helped our clients gain both national and local media coverage for their projects in order to build public support and leverage additional funding. We are based in Saratoga Springs, NY, with regional offices in Portland, ME; Boston, MA; Richmond, VA and Brattleboro, VT. Camoin Associates merged with 310 Ltd. in early 2019 to become Camoin 310. Our clients now have a single source solution for gathering business information, attracting and retaining investment and jobs, and developing strategic initiatives. To learn more about our experience and projects in all of our service lines, please visit our website at [www.camoinassociates.com](http://www.camoinassociates.com). You can also find us on Twitter [@camoinassociate](https://twitter.com/camoinassociate) and on [Facebook](https://www.facebook.com/camoinassociate).

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## Introduction

Provincetown faces an affordable housing crisis recognized by town residents and leaders, and is being addressed through numerous studies, initiatives, community and government groups, and advocates. Many in and around the area are working to create more attainable housing opportunities for both year-round residents and seasonal workers. While funding and community support for this pressing issue have existed over the last 20 years, there remains work to be done. In conjunction with an economic development strategic plan, Camoin Associates was commissioned to provide supplemental housing strategies.

## Framing the Problem

### Why Address Affordable Housing?

Affordable housing is important to the economic vitality of communities. Affordable homes support the local workforce so they can live close to their jobs. Shorter commutes allow workers to spend more time with their families while the community benefits from reduction in traffic congestion, air pollution, and expenditures on roads. In revitalizing communities, the construction of affordable homes can also help to stimulate economic growth. A healthy mix of housing options, including market-rate and affordable, for-sale and rental, single-family and multi-family, targeted to households across the age spectrum, ensures opportunities for all individuals to improve their economic situation and contribute to their communities.

Offering more affordable housing options in Provincetown would have numerous benefits; one of the most important benefits of affordable year-round housing is that it supports the vitality of the town's neighborhoods and business districts. Moreover, a housing stock that employees can afford supports businesses by making it easier to access and retain workers. It also benefits the community's seniors, allowing them to continue to live in the area as they age. Allowing people to live close to where they work supports community culture and volunteerism and encourages people to become invested in the community. It also ensures that a steady flow of younger residents will put down roots and enroll students in its schools, join volunteer organizations, and support community groups.

### The Short-Term Rental Impact

**A rise in short-term vacation rentals continues to constrict the supply of year-round rental housing, putting upward pressure on housing costs.** Oftentimes a homeowner can obtain a higher profit from short-term vacation rentals than from renting to a local resident. This creates an incentive to rent to vacationers over year-round residents, thereby limiting the supply of year-round rental options. While Airbnb listings account for a small number of Provincetown's housing stock, sustained growth in Airbnb and other short-term vacation rentals are increasingly impacting housing affordability.

Short-term vacation rentals, such as those listed through platforms like Airbnb and VRBO, impact the local housing market in that they make it easy for homeowners to rent their homes to vacationers, who are typically willing to pay higher rents than local residents. A housing unit that once housed a year-round local resident may be converted to a seasonal short-term rental, removing that unit from the rental housing stock and thus constricting the supply of rental housing and putting upward pressure on housing costs. Short-term rental listings for an entire housing unit have the greatest impact on housing affordability, but even listings for a room within an owner-occupied home affects the housing supply. A homeowner that may have otherwise been inclined to rent out a room to a local resident can command a higher price from visitors. At the same time, short-term rentals provide an opportunity for locals to supplement their incomes by renting out their homes during peak season while they live elsewhere.

Oftentimes a homeowner can obtain a higher profit from short-term vacation rentals than from renting to a local resident. For example, at a rate of \$1,200 per month for a 2-bedroom apartment, a landlord would earn \$14,400 annually in income from renting out an apartment year-round. Alternatively, the landlord could list the unit as a

vacation rental and charge \$225 per night during peak season. After just over 9 weeks (64 nights), the rental income generated would surpass the annual income from the year-round rental. This creates an incentive to rent to vacationers over year-round residents, thereby limiting the supply of year-round rental options.

In direct response to this issue, Massachusetts passed a short-term occupancy tax in late 2018 that will bring a new revenue stream to Provincetown. From the Town of Provincetown website:

*The tax applies to all rental occupancies that commence on or after July 1, 2019 and for which contracts with occupants were entered into on or after January 1, 2019. The total tax is 14.45% (which includes 5.7% state tax, 6.0% local tax, and 2.75% Cape Cod and Islands Water Pollution Fund Tax) of the total amount of the rent.*

Discussion of the specific uses of this new fund is ongoing, but given the severity of the housing problem a portion of this revenue should be funneled to the Town's existing affordable housing efforts and identify specific programmatic ways it can distribute the funds for maximum impact. Camoin Associates has reviewed the existing work of the Town, sought out case studies, and detailed how the Town of Provincetown can make progress towards their affordable housing goals. This strategic document intends to amplify the efforts of the Town and supporting organizations and align uses for this new budget line item. Opportunities and recommendations will focus primarily on year-round housing access, although seasonal worker housing is also constrained and will be considered.

## Priorities for Success

To frame our recommendations, we provide four priority actions. These include:

- 1) **Organize for action & identify roles and responsibilities;**
- 2) **Understand the market;**
- 3) **Evaluate & modify regulations; and**
- 4) **Create sustainable finance mechanisms.**

With these four priority areas, we will provide case studies from other communities and detail specific action items. Further, we will touch on existing Town efforts through the Playbook, existing groups, etc.

Within each section there are specific actions for implementation, priority actions for the coming year include:

- ➔ Continue with aggressive community engagement efforts including for housing development at the VFW site & 26 Shank Painter, the current police station.
- ➔ Update the Housing Playbook to provide an accurate reflection of the housing priorities that have been implemented.
- ➔ Continue and expand on collaboration between existing housing and other groups both in town and the region.

## Priority 1: Organize for Action

The Town of Provincetown and surrounding region is home to many organizations with programs to address the area's lack of affordable housing. However, when organizations do not strategize around goals and identify roles and responsibilities, efforts can often be duplicated and resources wasted. In order to most effectively use scarce funds and existing capacity, it is vital all organizations identify how they fit into the larger goal of increasing the affordable housing stock.

### Priority 1A: Roles and Responsibilities of the Town

To increase available housing, the Town must take the lead. They have hired dedicated staff, created programs, and written and commissioned reports to address this pressing issue. Below is a list of current programs run through the Town or Town-sanctioned organizations:

- Accessory Dwelling Units: allows homeowners to provide an additional dwelling unit on their property for the purpose of providing year-round housing.
- Affordable Housing Residential Tax Exemption: Provides property tax exemption for owners of affordable year-round rental housing.
- Deed Restricted Housing Development and Rehabilitation: Places restrictions on deeds that preserve it as a more affordable unit.
- Down Payment & Closing Cost Program: Through the Community Preservation Fund, allows eligible buyers up to \$10,000 towards down payment and closing costs for an affordable unit.
- Inclusionary Zoning: In developments of six or more units, one unit must be designated affordable, the developer must pay into a housing fund, or make a land donation. For developments of two to five units, it requires a payment-in-lieu based on the “affordability gap” determined.
- Self-Sufficiency Housing Voucher Program: Also provided through the Community Preservation Fund, this provides rent relief and education to year-round residents, which aims to have these residents be self-sufficient within a three-year period.
- VFW Site Development: To be developed into community housing in the near future.
- Year-Round Rental Housing Trust: Develop and manage affordable and community housing.

Given these tasks and the potential new income stream, the Town needs to prioritize the effectiveness of each program above, and how they might expand or change these services. Might there be programs that could consolidate efforts? Are there programs that could benefit from additional outreach? Examining these and other organizational questions can help streamline programs and create program efficiencies.

#### Recommendations:

- ➔ PRIORITY ACTION: Continue with aggressive community engagement efforts including for housing development at the VFW site & 26 Shank Painter, the current police station.
- ➔ PRIORITY ACTION: Update the Housing Playbook to provide an accurate reflection of the housing priorities that have been implemented.
- ➔ Consider adopting model language provided by Future Cape Cod Coalition to reserve 50% of new revenue from the short-term rental tax for housing, wastewater, transportation, broadband, and tourism marketing.<sup>1</sup> (As Provincetown’s housing issue is so pressing, and as it has a new wastewater facility, consider reserving more for affordable housing efforts.)
- ➔ With expected revenue from the Massachusetts marijuana tax, consider appropriating these funds to the above programs.



#### Idea: Start a Covenant Program Nantucket, MA

A covenant program allows property owners to have two dwellings of separate ownership on the same lot, as seen on Nantucket Island. The primary dwelling is a market rate unit, while the secondary unit (the Covenant unit) abides by income, occupancy, and re-selling restrictions. While the local municipality’s housing authority signs the covenants, the affordable housing nonprofit, Housing Nantucket, can issue fines under circumstances of noncompliance. They, in addition, administer the program.<sup>1</sup>

### Priority 1B: Roles and Responsibilities of the Housing Trust

In November 2016 the Town won legislative approval to create the Provincetown Year-Round Market Rate Rental Housing Trust (also known as the Year-Round Rental Trust, or “YRRT”). The Trust will increase the availability of year-round market rate rentals by leasing or buying properties exclusively for year-round rentals. Units will be target to

<sup>1</sup> <https://provincetown.wickedlocal.com/news/20190306/cape-towns-asked-to-target-uses-of-new-rental-tax-revenue>

those earning between 80 and 200 percent of AMI (annual median income). While the program charges rent, additional funds are needed to be fully self-supporting.<sup>2</sup> One potential use of new short-term rental tax funds is to provide additional funding for the YRRT to expand their purchasing capabilities. However, this will need to come after the development and rental of the Harbor Hill property, as this project is currently requiring significant Trustee and staff resources.

Closely after inception, YRRT acquired the Harbor Hill property, and has managed renovations, established property management, and started the renting process for its 28 units with full occupancy expected fall of 2019.<sup>3</sup> With the expectation of additional revenue and the completion of this project, YRRT can then look to a more expansive role in the community.

## Housing Trusts Today

Housing trusts are leaders in creating innovative ways to increase the amount of affordable housing in their community. They manage apartments, create shared equity programs<sup>4</sup>, offer homebuyer education and financial counseling, offer loans for rehab and energy efficiency, provide home buying programs that keep housing affordable in perpetuity<sup>5</sup>, and more. By offering a suite of programs, housing trusts are able to spread risk, have profitable programs support those that need additional funding, and ultimately reach a higher number of those in need.

The town of Provincetown currently has two housing trusts, the Affordable Housing Trust Fund under the Community Housing Council, and the Year Round Market Rate Rental Trust (YRRT). The former is a more traditional trust working on many of the efforts listed above; and the latter has a much narrower focus and targets year-round market rate rentals.

Housing trusts across the county are working on innovative ways to increase the amount of affordable housing in their community. Several examples follow:

*Build local support through a Workforce Housing Partnership (Martha's Vineyard, MA).* The Island Housing Trust serving Martha's Vineyard created the Workforce Housing Partnership which solicits local businesses to support affordable housing through in-kind and financial support. Supporters know that by providing affordable housing options, it means more potential availability of future employees, and a reduced commute for current employees. Specifically, the Partnership created an advertising campaign to raise awareness of the affordable housing issue. Also called Employer Assisted Housing (EAH).<sup>6</sup> While there is the ability for businesses to donate to the two housing trusts, additional outreach could be conducted to make this program more well-known and clarify the connection between business and housing issues.

*Use a land-trust model to encourage home ownership (Wilmington, NC).* Here a housing trust would purchase the underlying land, leaving the buyer responsible for purchasing the building structures and improvements made. This significantly reduces the cost to the homeowner. As the land holder, the trust would have the right to purchase any structures built on the property. These typically involve a 99-year lease on the underlying land. The housing trusts currently cannot do this so legislative language would need to be modified to accommodate.<sup>7</sup> However, the Town has taken this approach in the past, and will most likely do so with the VFW lot to be developed in the near future, albeit for rental property.

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<sup>2</sup> <https://www.capecodtimes.com/news/20170111/provincetown-launches-innovative-housing-solution>

<sup>3</sup> <http://www.provincetown-ma.gov/ArchiveCenter/ViewFile/Item/21664>

<sup>4</sup> <http://www.getahome.org/homes>

<sup>5</sup> [http://www.adkhousing.org/how\\_acht\\_works.asp](http://www.adkhousing.org/how_acht_works.asp)

<sup>6</sup> <http://www.ihtmv.org/donate/workforce-housing-partnership/> and <https://www.fels.upenn.edu/recap/posts/1570>

<sup>7</sup> <https://www.darenc.com/home/showdocument?id=1237> and <https://www.foreverplaces.org/what-we-do/>

## Recommendations:

- With current limited capacity, engage with the Housing Authority and other housing organizations engaged with increasing the year-round housing stock for various levels of income. Collaborate on projects to pool resources.
- Once the Harbor Hill project stabilizes, devote time to investigating additional properties or methods for increasing the year-round housing stock. Consider conducting a strategic planning session to identify priority projects and next steps.
- Communicate with the Massachusetts Housing Partnership for assistance on how other housing trusts are navigating the new short-term rental tax. To date, the Massachusetts Housing Partnership is not aware of any communities that have voted on a short-term rental tax and directed income to a housing trust fund.

## Priority 1C: Roles and Responsibilities of Other Housing Organizations

In addition to the two housing trusts, the following organizations touch on affordable housing and those most impacted by the lack of accessible and stable housing options in Provincetown and the surrounding area:

- 1) **Community Housing Council** oversees Provincetown Housing Office and manages the Affordable Housing Trust Fund.
- 2) **Community Housing Resource, Inc.** is a private company formed in 1996 whose mission is to provide affordable housing opportunities for year-round residents. They develop and manage both rental and ownership properties throughout Provincetown and maintain a notification list for their properties.
- 3) **CPA (Community Preservation Act)** overall has approximately \$600,000 in new funds each year with about \$360,000 for traditional affordable housing, after paying debt service.
- 4) **Housing Assistance Corporation** offers rental subsidies; housing consumer education, training and assistance; emergency and ongoing shelter for individuals and families; homelessness prevention; weatherization and energy rehab; and affordable housing development. This is some distance from Provincetown but is listed on the Town's website of assistance providers.
- 5) **Homeless Prevention Council** works to prevent homelessness before it happens in the eight towns of the Lower and Outer Cape (Chatham, Harwich, Brewster, Orleans, Eastham, Wellfleet, Truro, and Provincetown). They provide professional case management, which includes counseling, advocacy and referral services to appropriate resources.
- 6) **Lower Cape Community Development Partnership** is a community based non-profit organization created in 1992 by community leaders and activists who believed the eight towns of the Lower Cape needed an organization focused on affordable housing and economic development issues unique to the area.
- 7) **Provincetown Housing Authority's** primary mission is to develop and manage decent, safe, affordable rental housing for low income households, in accordance with the needs of the Town. They manage low-income and public housing programs.

The number of housing organizations within the Provincetown area give rise to potential burnout and capacity issues among the volunteers and staff who make these organizations run. In addition, there is a need to stay abreast of housing programs regionally and state-wide. We suggest representatives from these organizations attend regional meetings to both 1) understand housing efforts other regional communities, and 2) network with more local organization to potentially assist with projects.

## Recommendations:

- **PRIORITY ACTION:** Continue and expand on collaboration between existing housing and other groups both in town and the region.

- ➔ Capacity is a real issue among these organizations, with many of the same people staffing volunteer positions. Find ways to increase the number of volunteers or otherwise reduce the administrative overhead of these programs.
- ➔ Attend programming established by the Cape Housing Institute and others to get the latest information and case studies from peer communities around housing issues.
- ➔ Attend Barnstable County HOME Consortium quarterly meetings to focus priorities, share resources, and discuss critical issues.

### Priority 1D: Attempt Collaboration with Nearby Towns

Continue discussions with neighboring communities who have well below the required 10% Subsidized Housing Inventory (see text box) and get clear on what type of housing is most needed. Aim for consensus on:

- Dormitories for seasonal workers;
- Community housing for year-round residents; and
- Affordable housing for low-moderate income.

### Recommendations

- ➔ Begin discussions to work collectively on these issues, engaging the Barnstable County HOME Consortium and Cape Housing Institute. Use the regional scale to fund unique projects or ideas through the issuance of RFPs for different groups or developers to establish specific housing programs or pilot projects and award funds to those that will have the greatest impact on the region and has the greatest potential to scale.
- ➔ While discussions with Truro and the National Park Services about redevelopment of the Truro Highlands

The State of Massachusetts requires 10% Subsidized Housing Inventory (SHI). While Provincetown is very close to the 10%, surrounding communities have a very low SHI:

- Outer Cape- 4.4%
- Eastham- 2.1%
- Truro- 2.6%
- Wellfleet- 1.9%

Collaboration on how to increase the affordable housing stock in these nearby towns will indirectly help Provincetown. Cape Cod Commission has facilitated these discussions in the past.

#### Redevelopment in Laconia, NH

Camoin worked with the State of New Hampshire to identify private redevelopment opportunities of a 250-acre parcel in Laconia, NH that was the site of a former state school and prison. The process to do this included establishing the Lakeshore Facility Redevelopment Commission, hiring consultants to identify market potential and environmental constraints, conducting a community planning process, and identifying recommended reuse scenarios. The idea of this process is to create community consensus and clear the way for the issuance of an attractive and financially viable developer RFP.

have fallen flat, continue to consider this as a potential redevelopment option. Recognize the potential environmental and infrastructure constraints but also the opportunities that may exist on the property to create a hub of housing and services. When feasible, conduct a market analysis, community planning process, and financial analysis to identify highest and best use (including community benefit as an indicator and not just financial return).

## Priority 2: Understand the Market

Clearly understanding the market will create affordable housing strategies that meet the needs of the target populations in question. For Provincetown, the main housing struggle comes with two market segments 1) year-round residents and, 2) seasonal workers. However, Provincetown's year-round residents have twice voted against

condo conversion bylaws (in 2015 and 2016) and may do so with other legislative-based strategies.<sup>8</sup> The below strategies outline ways Provincetown can increase the number of units given these market segments.

## Priority 2A: Attack the Market Segments

### Recommendations

- ➔ Year-Round Residents & Workers:
  - 54.8% of housing is used as seasonal housing – continue to provide tax relief for year-round residents and make it financially attractive to stay in Provincetown.
- ➔ Seniors: The high proportion of older people living in the Provincetown will eventually mean a high demand for low maintenance residences. Catering to the needs and preferences of an older population is imperative for the success of Provincetown’s economy.
  - Expand a senior volunteer tax relief program similar to other communities in Massachusetts.<sup>9</sup>
  - Look to the Housing Authority to expand their role with the senior population.
- ➔ Seasonal Workers: with a largely seasonal and tourist-based economy, Provincetown relies heavily on temporary workers during the warmer months. However, with so much of the housing stock tied up in short term rentals for tourists, and because home owners can capture a high short-term rate from these rentals, there is little incentive to create housing for seasonal workers.
  - If you are a current business, and provide some level of housing for your staff, you should get a tax credit beyond what already exists. Ensure all codes and standards are followed and provide incentives and assistance for business owners who are working to house their staff and maintain safe units.<sup>10</sup>
  - The passing of Article 36 in the April 1, 2019 town meeting warrant removes the 6-month restriction on Recreational Vehicles (RVs) staying at campgrounds. This will give campers the option to stay at the town’s two campgrounds year-round.<sup>11</sup> Make sure outreach regarding this is targeted to seasonal workers.

## Priority 2B: Educational Focus

An additional market segment to consider is the year-round residents, whom have twice voted against condo conversion bylaws in 2015 and 2016. Condominiums comprise 55% of all housing, with 71.2% owned by non-residents. The Town must be wary of NIMBY (Not In My Backyard) issues. The Dartmouth report indicates larger-scaled multi-unit structures were not favored among the voting constituency in Provincetown. Unfortunately, this is contrary to what is needed. Residents want to maintain the character of the town and place high value on aesthetics of new developments, but density will be required to ensure an adequate supply of affordable and community housing is available.

### Recommendations

- ➔ Establish or designate an organization to take on the role of advocacy about the challenges of housing and how lack of housing options is having a direct impact on economic activity and quality of life for all residents and visitors.

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<sup>8</sup> This not only has been voted against but has created a perception of future restrictions, causing an increase in condo conversions. Condominiums now comprise 55% of all housing, with 71.2% owned by non-residents.

<sup>9</sup> One example is the Town of Milford. Seniors over 60 years of age can receive up to a \$1,000 property tax abatement. More information can be found here: [https://www.milfordma.gov/sites/milfordma/files/uploads/town\\_of\\_milford\\_senior\\_volunteer\\_tax\\_relief\\_program.pdf](https://www.milfordma.gov/sites/milfordma/files/uploads/town_of_milford_senior_volunteer_tax_relief_program.pdf)

<sup>10</sup> While research conducted did not yield specific programs to emulate, there are variations on this theme. For instance, the State of Florida has a Community Contribution Tax Credit Program which provides up to a 50% tax credit or sales tax refund to encourage businesses to make donations towards housing and community development projects. [http://www.floridajobs.org/docs/default-source/business-growth-and-partnerships/community-contribution-tax-credit-program/cctcp\\_programoverview.pdf?sfvrsn=2](http://www.floridajobs.org/docs/default-source/business-growth-and-partnerships/community-contribution-tax-credit-program/cctcp_programoverview.pdf?sfvrsn=2)

<sup>11</sup> <https://provincetown.wickedlocal.com/news/20190314/bylaw-change-aims-to-expand-tiny-home-use>

## Priority 3: Evaluate and Modify Regulations

With an understanding of the market needs, regulations can be changed to increase impact.

### Priority 3A: New Housing Units

The Dartmouth report stated 232 new housing units can be expected to be built between 2018-2025. Some, if not most of these will need to be affordable. However, with just 66 vacant lots left to develop, there will need to be emphasis on higher density. In addition, 324 properties exist (788 units) that are multi-unit and have not been converted to condominiums. It is important these properties stay in year-round rentals, versus being converted to condominiums, sold to out-of-town residents, and rented on a short-term basis. Continue to utilize zoning and land use regulations to encourage affordable housing development, such as subsidized development of priority unit types and inclusionary zoning bylaws.

### Priority 3B: Higher Density and Accessory Units

Provincetown's existing housing program includes an Accessory Dwelling Unit (ADU) permitting process. ADUs are additional units build on a lot with an existing structure (typically a single-family home). In Provincetown, ADUs are limited to 600 square feet, are allowed in all residential and commercial zoning districts, and can be constructed as a new structure, or as part of an existing structure (basement or attic). Provincetown's current program does not require ADUs be affordable but does require they be used for year-round rentals.<sup>12</sup>

### Priority 3C: Incentives for Additional Units

Anecdotally, Camoin 310 learned of a business owner creating housing for his seasonal workforce. This process should be encouraged through outreach of the Affordable Housing Residential Tax Exemption, which provides property tax exemption for owners of affordable year-round rental housing. Incentives can also be used for those single-family homeowners renting rooms to seasonal workers or year-round employees, or those choosing to add additional affordable units to their existing structure (through an ADU). Additional research will be required to understand how to make this work within current legislation.

### Priority 3D: Investigate Performance or Form-Based Zoning

Aligning developments with (some) potentially outdated and unnecessary zoning codes may create a longer process on the path to creating more accessible housing for year-round residents. While sewer and water capacity are a real issue and limit the amount of infill potential, an alternative zoning method could be considered to allow for easier development of year-round housing units. Performance based zoning is less concerned with the use that goes on inside buildings and more concerned with their appearance and the way buildings relate to each other in the context of a neighborhood. Town officials would create goals for a parcel or area, and developers would be required to meet those goals without structured regulation. It does not tell you how to achieve it, just that it needs to be achieved.

Form-based zoning is similar in that it addresses not only development but the relationship between public and private spaces such as the interaction between streets, blocks, and buildings in terms of form, scale and massing, and the use of frontage areas. There is a current house bill in Massachusetts being developed that "...will be aimed at creating more housing choices for families, encouraging cities and towns to update zoning more often, establishing more predictable permitting, reducing time and money spent on legal battles, and improving local

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<sup>12</sup> <http://www.provincetown-ma.gov/DocumentCenter/View/10280>

coordination around development.”<sup>13</sup> The progression of this bill should be watched to see how it may impact zoning in Provincetown.

## Priority 4: Create Sustainable Financing

After developing an understanding of who does what and what the best market strategies are, the next step is to finance such approaches and strategies.

### Priority 4A: Raise and Spend Money Sustainably

Focus on ways to raise money continuously versus episodically. Options include:

- ➔ The Town estimates that as much as \$1 million in additional revenue will be generated from the short-term rental tax. Funnel these funds into current programs that fund housing assistance.
- ➔ Consider raising property taxes on second and/or out-of-area home or condo owners.
- ➔ Increase permitting fees for market rate housing, in combination with the current policy to waive fees for affordable housing.
- ➔ With an estimated revenue of \$120-250k annually<sup>14</sup>, consider diverting revenue from the marijuana tax to go towards housing efforts.

### Priority 4B: DIF and TIF Programs

DIF (District Improvement Financing<sup>15</sup>) enables the capture of tax revenues generated by new private investment in a designated geographic area into a fund for identified public and economic development projects. While in theory this can be used to support affordable housing development, in practice that has not happened in the State of Massachusetts. Since DIF depends on an *increase* in available tax revenues to fund projects, and many affordable housing support programs rely on the provision of tax *reductions*, DIF can be overlooked as a tool. In contrast, TIF (Tax Increment Financing) can be used to reduce tax payments in a district and explained further in the box below.<sup>16</sup>

DIF and TIF may be used on the same parcels – although they do not need to be - and each can contribute to housing goals, but they must be separately authorized. DIF is enacted through local legislation, while TIF requires state-level approval.

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<sup>13</sup> [https://www.newburyportnews.com/news/regional\\_news/house-leaders-outline-potential-path-for-housing-land-use-bill/article\\_ca056d8b-dbb9-5959-804e-bacc1686b006.html](https://www.newburyportnews.com/news/regional_news/house-leaders-outline-potential-path-for-housing-land-use-bill/article_ca056d8b-dbb9-5959-804e-bacc1686b006.html)

<sup>14</sup> <https://provincetown.wickedlocal.com/news/20190307/save-rental-tax-windfall-for-housing>

<sup>15</sup> DIF is authorized by Mass. Gen. Laws Ch. 40Q

<sup>16</sup> TIF is authorized by Mass. Gen. Laws Ch. 40 §59

DIF can allow the town to offset a deficit it may incur through selling or leasing property at below cost when the transaction furthers the goal of a development program, including supporting affordable housing. A municipality may also use DIF funds to pay the capital costs of housing that it will own and operate. It can allow the Town to capture property tax revenues from a new private investment – say on the waterfront – and direct them to the housing trust to pursue affordable housing initiatives. Up to 25% of the geographic area within a municipality can be within a DIF district. As properties do not have to be contiguous to be part of the same DIF district, one district could make up both properties destined for waterfront development, and those devoted to affordable housing.

## About Tax Increment Financing (TIF)

Tax Increment Financing (“TIF”), which enables a municipality to enter into an agreement to reduce taxes on Real Property, creates incentives for investment in a targeted area. TIF requires approval by the state’s Economic Assistance Coordinating Council (EACC). Municipalities may apply for permission to enter into TIF Agreements through the Economic Development Incentive Program.

Under TIF, landowners may be granted property tax exemptions of up to 100% of the incremental increase in assessed value that comes from new development. A municipality may enter into a TIF Agreement with a landowner for a maximum term of 20 years. A TIF must be in an area approved by the EACC as an Economic Opportunity Area (EOA) or found to be an area “presenting exceptional opportunities for economic development” by the Director of Economic Development.

Some communities have TIF guidelines on their website that lay out the TIF application process for a potential development. Provincetown could consider assembling its own set of guidelines, if it determines TIF is an appropriate course of action.

- <https://www.mma.org/shelburne-develops-tif-guidelines-0>
- <http://www.town.barnstable.ma.us/economicdevelopment/TIF%20Application%20Checklist.pdf>
- <http://southhadley.ma.gov/258/Tax-Increment-Finance-Plan>
- <https://www.northamptonma.gov/DocumentCenter/View/878>

## Priority 4C: Leverage Partnerships

While Provincetown has done this in the past, partnering with affordable housing developers can be a good strategy to move projects forward. This can be accomplished through issuance of a request for qualifications or proposals in which the Town provides clarity on objectives and policies it is willing to use to achieve them and then solicits development plans through an open process. Resulting partnerships, if proposals are brought to fruition, would likely include a combination of tools to create affordability including land-use policies to allow density, land contributions, or tax increment financing. This can include non-profit development entities such as Habitat for Humanity. The current VFW site may be a good option for this.

## Priority 4D: Utilize State Funding

Affordable housing is an issue throughout the state. The Citizens’ Housing and Planning Association outlined the following funding sources passed in a housing bond bill by the Massachusetts state senate on March 28, 2018.<sup>17</sup> While some of these funds may not be applicable to Provincetown, they are listed here as a potential funding source for some of the area’s other affordable housing organizations and developers with whom the Town can partner.

- **AFFORDABLE HOUSING TRUST FUND (AHTF) – \$400,000,000**

The AHTF is a flexible tool administered by MassHousing to create and preserve affordable housing. It has been used to support of a variety of projects, including permanent and transitional housing for the homeless and for the rehabilitation of public housing and 1 to 4 units in gateway cities. It can serve

<sup>17</sup> <https://www.chapa.org/housing-news/ma-senate-passes-housing-bond-bill>

moderate-income households, up to 110% of the area median income (AMI), though the majority of AHTF projects serve households at 60% AMI. It also supports first time homebuyers through the ONE Mortgage program.

- **CAPITAL IMPROVEMENT AND PRESERVATION FUND (CIPF) – \$125,000,000**

CIPF assists in the preservation and improvement of existing privately owned, state or federally assisted affordable rental developments that are at risk of losing their affordability restrictions. The Housing Bond Bill includes clarifying language to make the program work better with other housing preservation resources.

- **COMMERCIAL AREA TRANSIT NODE HOUSING PROGRAM – \$50,000,000**

This program encourages smart growth by producing homeownership and rental housing in mixed-use, commercial areas served by public transit.

- **COMMUNITY BASED HOUSING (CBH) – \$55,000,000**

CBH extends the Commonwealth’s goal of providing assistance to persons with disabilities in the least restrictive settings possible. The program provides funding for the development of integrated housing for people with disabilities, including elders, with priority for individuals who are in institutions or nursing facilities or at risk of institutionalization.

- **FACILITIES CONSOLIDATION FUND (FCF) – \$65,000,000**

FCF produces community-based housing for clients of the Department of Developmental Services (DDS) and the Department of Mental Health (DMH). Through the fund, DHCD works closely with DDS and DMH to provide housing for people with a wide range of disabilities.

- **HOME MODIFICATION LOAN PROGRAM (HMLP) – \$60,000,000**

The HMLP helps persons with disabilities and the elderly make renovations to their homes through deferred payment or zero interest loans to ensure they can continue to live at home and avoid placement into more costly institutional settings, such as nursing homes. Program Changes: The Housing Bond Bill includes clarifying changes that better aligns the program language with its actual use; clarifying language to explicitly allow the HMLP to be used by families to construct accessory dwelling units for persons with disabilities; and authorizing a grant program to allow landlords to access the HMLP to make renovations to apartments in order to accommodate the needs of disabled tenants.

- **HOUSING INNOVATIONS FUND (HIF) – \$100,000,000**

HIF supports the production of innovative and alternative forms of rental housing, including single person occupancy (SPO) units, transitional and permanent housing for the homeless, shelters for survivors of domestic violence, supportive housing for seniors and veterans, and housing for substance abuse recovery. HIF projects almost always feature affordable housing units combined with support services for residents.

- **HOUSING STABILIZATION FUND (HSF) – \$150,000,000**

HSF provides funding for the acquisition, preservation, and rehabilitation of affordable housing, including foreclosed and distressed properties. HSF has helped finance family rental, elderly housing, single room occupancies (SROs), special needs housing, and a mix of homeownership and rental housing. The Housing Bond Bill changes the weak markets provision within the program to allow it to be used for single family homes as well as multifamily housing.

- **PUBLIC HOUSING – \$600,000,000**

This program helps modernize and rehabilitate our state’s public housing stock. It allows local housing authorities to plan for capital improvements, renovations, abatement of hazardous materials, or to remodel homes for persons with disabilities.

- **PUBLIC HOUSING DEMONSTRATION PROGRAM – \$50,000,000**

This demonstration program allows public housing authorities to use innovative public housing finance tools to leverage new funds and partners to rehabilitate public housing and reduce ongoing capital costs.

- **WORKFORCE HOUSING INITIATIVE - \$100,000,000**

The Workforce Housing Initiative by MassHousing supports the creation of rental housing that is affordable for working families with incomes of 61% to 120% of Area Median Income (AMI). The Initiative provides up to \$100,000 of subsidy per workforce housing unit to create 1,000 new units of workforce housing statewide with deed restrictions that ensure 30 years of affordability.

- **EARLY EDUCATION AND OUT OF SCHOOL TIME (EEOST) – \$45,000,000**

EEOST offers grants to non-profits to help build early education and out of school time program facilities that serve low-income children. It provides flexibility to build or renovate buildings in order to provide children and teachers with safe, healthy environments that support other quality improvement efforts. The program is administered through the Children’s Investment Fund at CEDAC and works closely with the Department of Early Education and Care. The Housing Bond Bill –

- Increases the percentage of slots for low-income children served by early education programs supported by the program from 25% to 50%; and
- Changes eligibility requirements for the program to allow only those organizations who are currently providing early education and care to low-income children.

- **MASSACHUSETTS LOW INCOME HOUSING TAX CREDIT (LIHTC)**

The Massachusetts LIHTC awards tax credits to investors in affordable multifamily rental projects. It encourages private investment in affordable housing and allows developers to finance part of the cost of the development with equity invested by local corporations and individuals to help keep rents low. The Housing Bond Bill extends the program until 2025 and expands the annual allocation to \$25 million. The additional \$5 million tax credits will be used for the preservation and improvement of existing affordable housing.

- **COMMUNITY INVESTMENT TAX CREDIT (CITC)**

CITC enables local residents and stakeholders to work with and invest in community development corporations (CDCs) to improve economic opportunities for low and moderate income households in communities across the Commonwealth. Over the past three years, this program has generated nearly \$24 million for CDCs across the state, enabling them to deepen their community engagement, create more housing opportunities, and increase their impact. The Housing Bond Bill extends the CITC through 2025 and gradually raises the annual cap from \$6 million to \$12 million.

- **MASSACHUSETTS HISTORIC REHABILITATION TAX CREDITS**

The Housing Bond Bill increases the annual authorization for the state Historic Tax Credit from \$50 million to \$55 million. The state Historic Tax Credit attracts developers to invest in once vacant, deteriorated, and underutilized structures, such as old mills, schools, and hospitals, and transforms them into much needed housing and commercial space. The Massachusetts Historic Tax Credit has been used to revitalize many of the Commonwealth’s communities, including Gateway Cities.

- **BROWNFIELDS TAX CREDIT**

The Brownfields Tax Credit helps clean up polluted sites in Massachusetts and transform them into places where people can live and work, creating housing and economic development opportunities. The Housing Bond Bill extends the Brownfields Tax Credit for five years.

- **HOUSING DEVELOPMENT INCENTIVE PROGRAM (HDIP)**

HDIP provides Gateway Cities with a redevelopment tool to help create affordable and market rate housing, promote neighborhood stabilization, and support economic development through tax credits. The Housing Bond Bill extends the annual \$10 million authorization for HDIP until 2024.

- **MASSHOUSING AUTHORIZATION**

The Housing Bond Bill authorizes MassHousing to provide services outside of Massachusetts in three ways: (1) contract administration services in connection with any HUD multifamily rental subsidy program; (2) loan servicing for one to four family residential mortgage loans, provided the majority of loans serviced are secure by mortgages on property located in Massachusetts; and (3) loan servicing related to residential mortgage loans in partnership with governmental or quasi-governmental agencies.

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# Community Survey Responses: Town of Provincetown, MA

January 9, 2019

Prepared for:

Town of Provincetown  
Town Hall  
260 Commercial Street  
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## About Camoin Associates

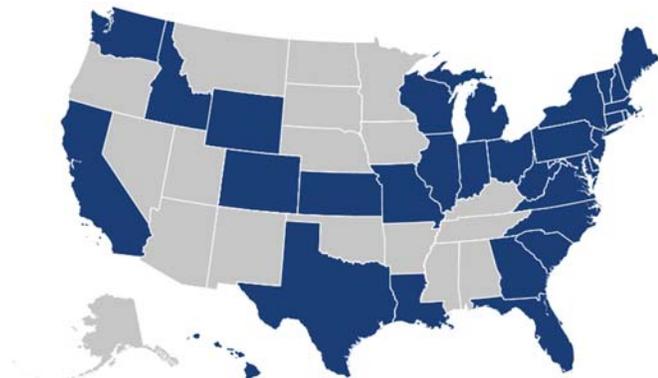
Camoin Associates has provided economic development consulting services to municipalities, economic development agencies, and private enterprises since 1999. Through the services offered, Camoin Associates has had the opportunity to serve EDOs and local and state governments from Maine to California; corporations and organizations that include Lowes Home Improvement, FedEx, Amazon, Volvo (Nova Bus) and the New York Islanders; as well as private developers proposing projects in excess of \$6 billion. Our reputation for detailed, place-specific, and accurate analysis has led to projects in 32 states and garnered attention from national media outlets including *Marketplace* (NPR), *Forbes* magazine, *The New York Times* and *The Wall Street Journal*. Additionally, our marketing strategies have helped our clients gain both national and local media coverage for their projects in order to build public support and leverage additional funding. We are based in Saratoga Springs, NY, with regional offices in Portland, ME; Boston, MA; Richmond, VA and Brattleboro, VT. To learn more about our experience and projects in all of our service lines, please visit our website at [www.camoinassociates.com](http://www.camoinassociates.com). You can also find us on Twitter [@camoinassociate](https://twitter.com/camoinassociate) and on [Facebook](https://www.facebook.com/camoinassociate).

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## Overview and Key Findings

A survey was made available to community members in Provincetown to gather information to complement the Economic Development Strategy for the town. The survey focused on Provincetown's assets and constraints within the business, industry, and economic development realm. Respondents highlighted key actions and concerns that need to be addressed in the Town's new strategy. Additionally, respondents were provided the opportunity to offer their candid feedback on pertinent information for the community and economic development in the Town of Provincetown.

In total there were 269 survey respondents, of which 186 (69%) identified Provincetown as their primary residence ("primary residents"). Of the respondents who are not primary residents of the town, 71% were from New England ZIP codes. Two-thirds of the respondents own their homes in Provincetown. On average, respondents have lived in Provincetown for 14.3 years. Nearly all (99%) primary residents spend over 50% of the year in the town.

The following is a summary of the key facts gathered from the survey:

- Provincetown's greatest assets are History, Arts, Culture; Natural Resources; and Location. Combined, these assets position Provincetown to attract an array of visitors. Additionally, these assets can be further leveraged to attract workers and businesses into the area.
- The industry mix of respondents represented businesses that serve visitors as well as residents. The top industries represented in the survey were Accommodations, Retail, and Arts or Cultural.
- Tourism was listed as the most important industry for the future of Provincetown. In general, respondents view tourism as a major opportunity for Provincetown and would like to expand the tourism markets through targeted visitation and building a year-round tourism industry.
- Currently, the greatest constraints to the future economic sustainability of Provincetown are Housing Costs and Housing Availability. Similarly, Housing ranks as the most critical factor for economic well-being. Respondents noted the current state of workforce housing as a hinderance to economic growth. Providing adequate and affordable options would allow the local labor market to expand and perhaps attract key businesses to the area.
- In general, infrastructure upgrades for telecommunications and broadband as well as water and sewer are supported by the community. Financial assistance programs such as revolving loan funds and grant programs also rank among the top supported areas of economic development.

### COMMUNITY SURVEY

**269**

Total Respondents

**69%**

of Respondents were Primary Residents of Provincetown

**67%**

of Provincetown Residents Own Their Homes

**14.3**

Average Years Residents Have Lived in Provincetown

**99%**

of Primary Residents Spend the Majority of the Year in Provincetown

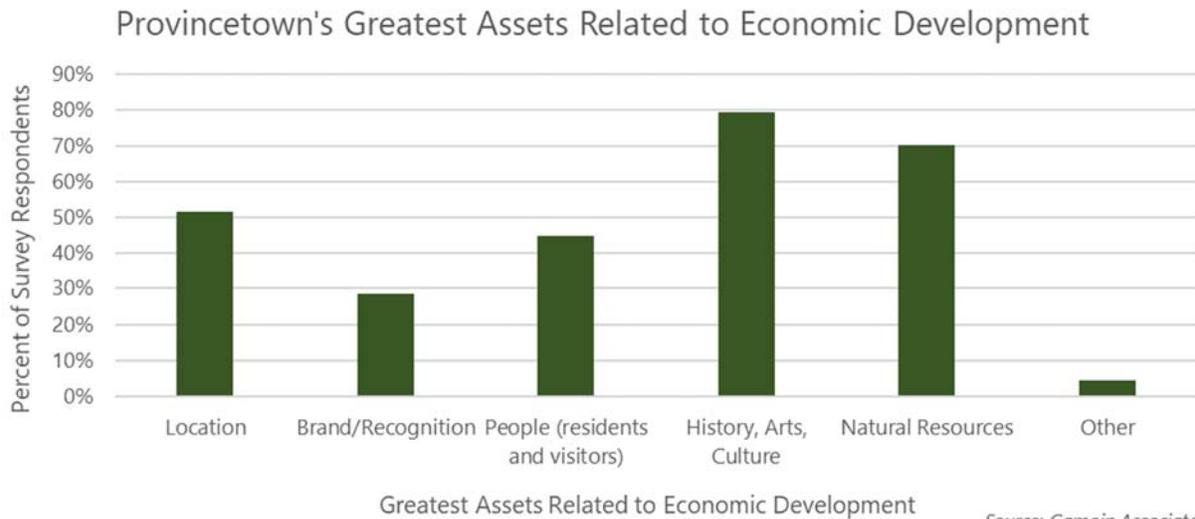
**71%**

of Respondents Who Do Not Live Primarily in Provincetown are from New England



## Provincetown Assets

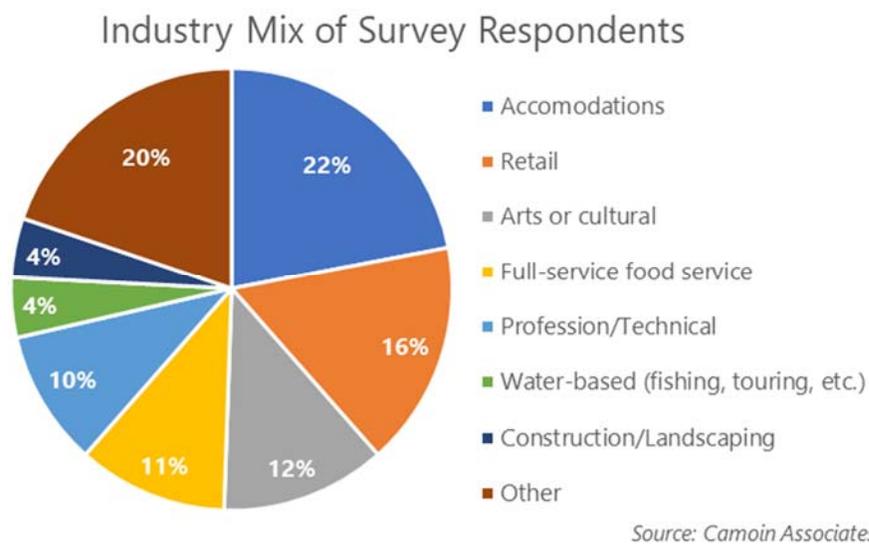
When asked to select three of Provincetown's greatest assets related to economic development, the number one response was History, Arts, Culture with 79% of the responses. Natural Resources, Location, and People (residents and visitors) followed with 70%, 52%, and 45% of responses. Approximately 4% of respondents provided a write-in response, represented as "Other" on the chart and include restaurants, access to talent, potential of telecommunications, tourism, and LGBTQ (lesbian, gay, bisexual, and transgender) population that visits the area.



## Business and Industry

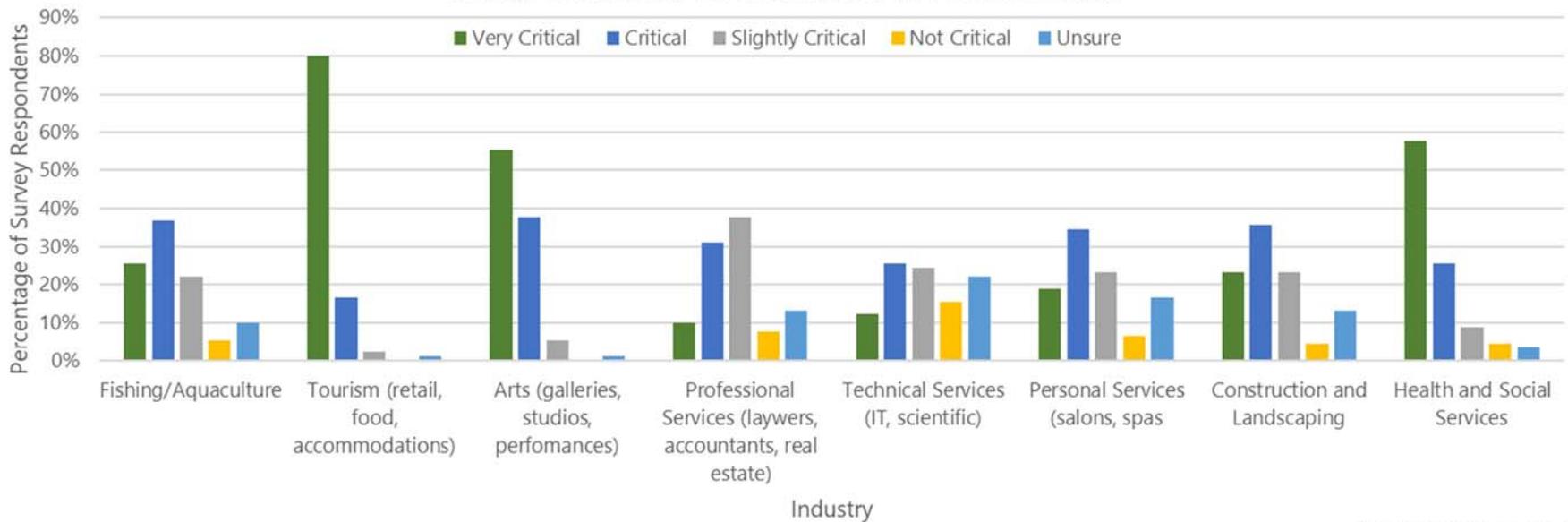
Of the 269 total respondents, 91 (66.2%) own or manage a business in Provincetown. Businesses range from newly opened to being in operation for 36 years. On average, these businesses have been open for 11.2 years.

The industry mix of respondents that own or manage a business in Provincetown is 22% Accommodations, 16% Retail, 12% Arts or cultural, 11% Full-service food service, 10% Profession/Technical, 4% Water-based (fishing, touring, etc.), 4% Construction/Landscaping, and 19% Other. Other industries that were written-in include bar, cleaning, media, salon and spa.



Survey respondents were asked to rate industries on how critical they are for the future of Provincetown. The figure below displays the responses for each industry. Tourism, including retail, food, and accommodations, ranked as the most critical industry for the future of Provincetown, with 80% of respondents ranking it as “Very Critical” and no respondents listing it as “Not Critical”. The majority of respondents ranked Health and Social Services and Arts as “Very Critical”. Professional Services, including lawyers, accountants, and real estate, ranked as the least critical industry in comparison to the other industries.

Critical Industries for the Future of Provincetown

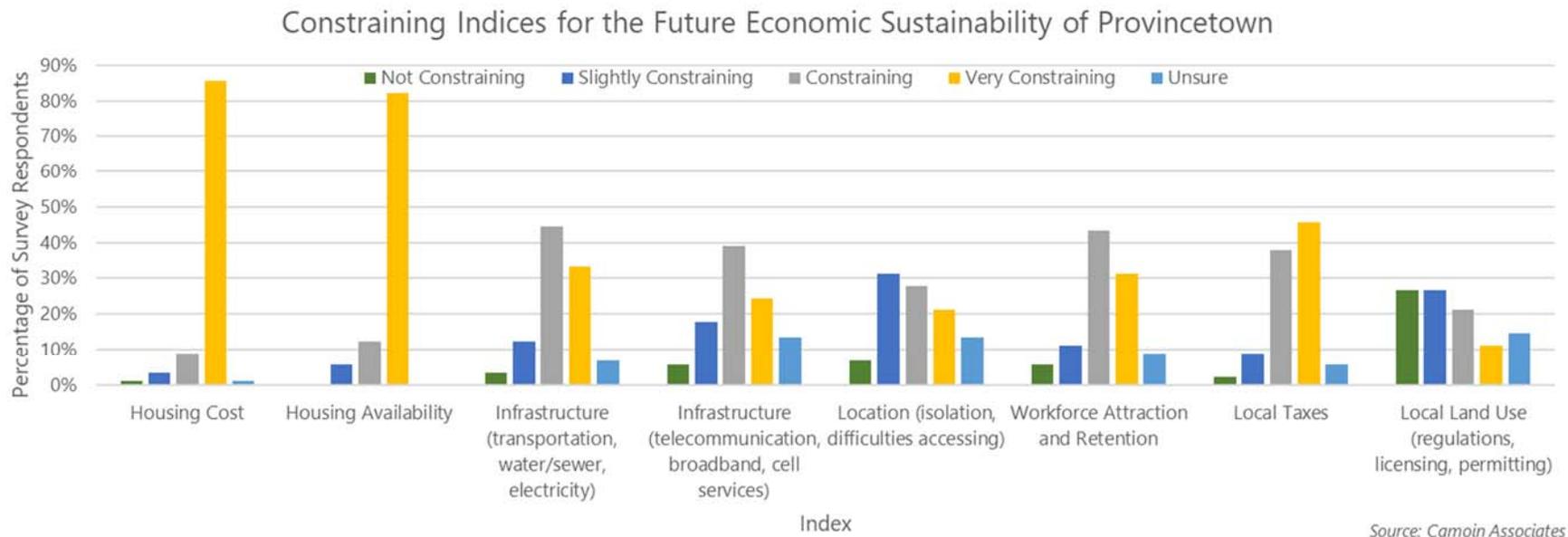


Source: Camoin Associates



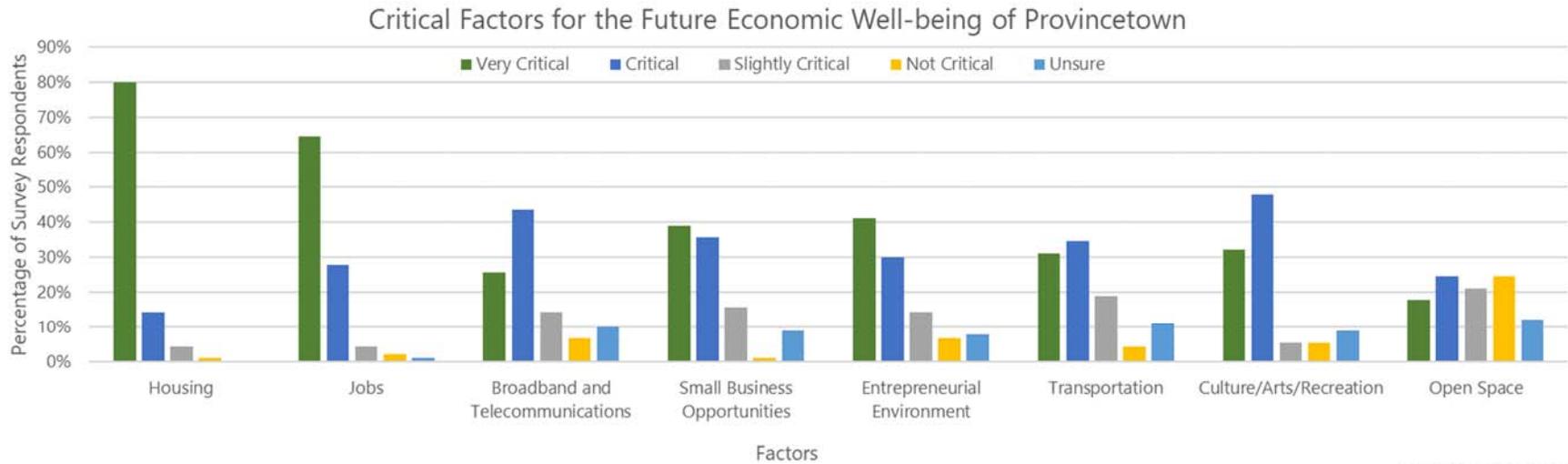
## Constraints

Housing Costs and Housing Availability are among the top constraints to the future economic sustainability of Provincetown with 86% and 82% of respondents deeming each index as “Very Constraining.” On the other hand, Local Land Use including regulations, licensing, and permitting is the least constraining factor with 27% of respondents deeming it “Not Constraining.”



## Critical Factors

Housing was listed as the most critical factor for the future economic well-being of Provincetown with 80% of respondents deeming it “Very Critical.” Jobs was the second most critical factor with 64% of respondents marking it as “Very Critical.” Conversely, Open Space was significantly less critical with 24% of respondents listing it as “Not Critical.”



Source: Camoin Associates

## Supported Areas for Economic Development

The figure on the right displays the top supported areas of economic development by percentage of survey respondents. The top supported areas for economic development were infrastructure upgrades specific to telecommunications and broadband improvements, financial assistance programs, and infrastructure upgrades to water and sewer with 41%, 38%, and 38% of respondents respectively.

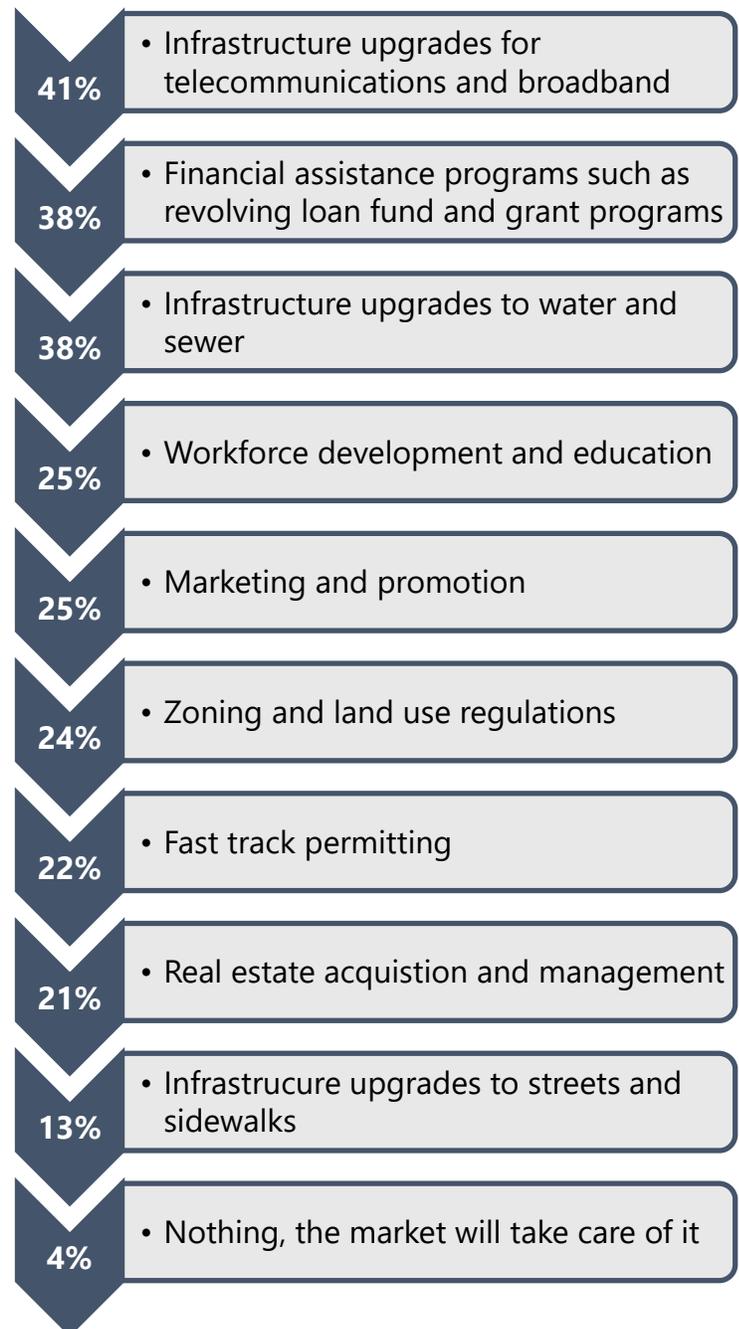
Conversely, 4% of respondents supported the idea that the market will take care of economic development. Additionally, 2% of respondents believed the Town should not allocate additional resources to economic development. Technical assistance programs was the only survey option that received zero votes.

## Additional Considerations

In addition to structured questions, respondents were provided the opportunity to provide feedback that they saw as pertinent to the community and economic development in the Town of Provincetown. Feedback included concerns, recommendations, and suggestions, which are summarized below.

- A number of respondents noted that housing, specifically a lack of workforce housing, was a hinderance to the Provincetown economy and noted as the town's most critical need. The lack of affordable housing creates pressure on the local labor pool creating a lack of middle-class jobs.
- The theme of business attraction and job creation was closely tied to the concept of workforce housing. Many respondents believe the community needs to fund and further develop workforce housing to attract professionals. Business attraction in general should focus on science and technology, telecommuting, and alleviating permitting and funding costs for businesses in the area.
- The tourism industry highlighted several opportunities for respondents as well as one concern regarding tour buses and cruises degrading the town. Respondents were interested in tourism metrics for the economy, attracting more LGBTQ visitors, and building a year-round tourism industry. Tourism jobs were viewed as providing stable employment within the community.

## Top Supported Areas for Economic Development by Percentage of Respondents



- Respondents noted that accountability and a clear delineation of roles and responsibilities is needed to further economic development.
- Concerns over drug use and homelessness were also noted. Working to address these issues, real and perceived, will help to create a more vibrant sense of place for Provincetown residents and visitors.

*Please note that not all responses are included in the bullets above, however, each response was taken into consideration for future economic development planning.*

## Survey Comments

This section provides the comments "as-is" received in the survey.

- Bring a university to the town - we have a huge untapped resource in retired teachers here. Supply housing for students and many will stay all summer and replace seasonal workers, flattening out the housing demand curve.
- Absolutely anything that builds year round tourism helps the town by providing stable employment.
- Accountability of Financial Decisions
- Affordable year round and seasonal housing is becoming a critical issue for Provincetown. The added cost of business to provide discounted housing to entice employees is a great burden. In addition the lack of affordable year round housing means a much smaller local labor pool. These are the biggest economic challenges facing this town
- Allow greater ease for local businesses to permit and get Town funds more easily whether as grants or low interest loans. Maybe continue to use the 3% CPC surcharge after 2020 for such a pool from which to draw for this.
- build for families!
- Get a clue on how many ppl are homeless this winter.
- It is critical for us to look at more sustaining businesses that bring professional level individuals to live and work in Provincetown. Be a destination for science and tech.
- It really unclear what permits a business needs and you get different answers from each person at town hall - there should be a simple checklist and flow chart!
- Need a commitment to town. Most people are self serving and looking to the value of their property to cash out. Not clear at town hall Who is actually responsible for results.
- Need more seasonal and year round rentals! Hello! ;)
- Not everything is housing
- Please provide real metrics about the role of Tourism in our economy. Please help attract new business to Provincetown to fill vacancies in addition to higher level goals.
- SPEND THE \$\$ ON ATTRACTING THE HIGHEST VISITOR RATIO EG LGQT
- Stop bringing in tour buses and cruise ships. It is ruining the town
- streamlining and fast tracking essential to future sustainability
- The business community needs to fund/develop workforce housing.



- The drug problem -specifically the meth problem- needs to be addressed and enforced. We are at a critical tipping point, and if left unattended, will cripple our economy in parts. It could affect and implode our town's tourist economy and more. It's been said that "Provincetown is the place to go to get annihilated." Also have heard, "Meth is the new AIDS." The problem is rampant in our Town in season. We don't have enough responders to deal with the escalating problem. One drugged out person could set this town on fire. I suggest we pull together a group of concerned citizens to work collaboratively: from our town government, school system, local and state police, civic and faith organizations, parent groups, youth and adult group leaders; retail & gallery & hospitality; local Support Groups, everyone! If not addressed, it could bring this town down literally. Thank you for listening.
- The issue for the town is what is the pathway to regular full-time well-paying jobs on the outer cape? This isn't a Provincetown specific problem, as no town can do this alone. The issue is regional. This is a remote, rural location, bounded by National Seashore that can never be developed. The town doesn't even have drinking water of its own. Housing and living costs will always be high. Given those constraints, what sort of businesses can develop here? And the elephant in the room is, do people who live here even want full-time, year-round jobs with two to three weeks of vacation a year anyhow? Side note: telecommuting jobs are mostly advanced and require high levels of education. Those are not going to even out the lopsided economic distribution of the town, they will just feed what it already is. There is no effective middle-class here because that's where the jobs are lacking and that's where the effort needs to concentrate.
- The town needs to address climate change and mitigation for the town. This could be a job opportunity but we should have real plans and work on this
- The town needs to provide workforce housing since the town's economy so heavily relies upon seasonal businesses to service the visiting and year round population.
- The town should invest time and money in regional answers to economic development challenges. Housing and workforce transportation from Eastham-Provincetown should be part of the solution.
- This survey was good in many ways but given P-town is a part of considerable local, regional, and global desire, overlooking or excluding one of the most important water dependent areas, with clear publicized interest expressed by the public, the drafters have failed in their responsibility to the public.
- We need to create some tech type facility (remote assistance / telecommuting / service/support type location to encourage businesses to view our location and workforce as a place to open a center
- Workforce housing is the most critical need.

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# Data Summary and Analysis

Town of Provincetown, MA

November 20, 2018

Prepared for:  
Town of Provincetown  
Town Hall  
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## About Camoin Associates

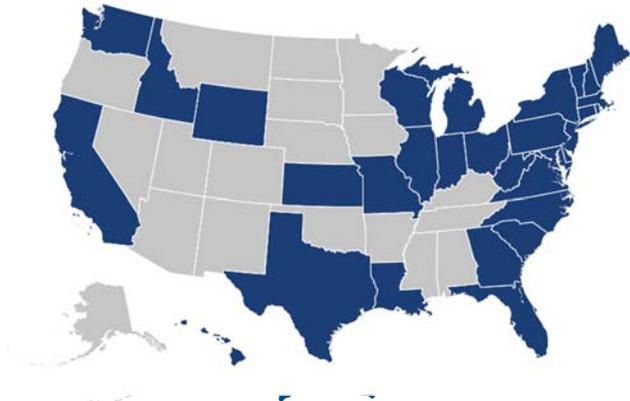
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## Executive Summary

The Town of Provincetown is undergoing an economic development strategic planning process to position itself to create a more functional and sustainable year-round economy. For any strategic planning process, it is critical to first lay the groundwork to understand the existing conditions. The following report is a review of the existing economic conditions in the town that lays the foundation for the development of specific economic development recommendations.

The following report summarizes a report completed by the UMass Dartmouth Public Policy Center titled “A Baseline Assessment of the Economic Conditions in Provincetown, Massachusetts” and works to analyze what that means for economic development. Key data findings with implications for economic development are listed below with more detail in the full report.

## Key Findings

The following bullets summarize the basic data findings with specific focus what the data points mean for economic development in Provincetown.

- **Over 70% of the population is over 45 years old.**
  - With an older population and relatively high level of isolation at the tip of Cape Cod, Provincetown will need to pay attention to ensuring that the needs of the older residents are being met. Not only the health-related needs but also the goods and services, cultural opportunities, and recreational opportunities that they may want to enjoy throughout the year.
  - An older population also impacts issues related to workforce and particularly on business owners’ ability to find the workers they need. Interconnected with the aging population are the challenges that workers to replace those aging out of the workforce have when it comes to affording Provincetown and logistics related to traveling to and from work.
  - Without many young people moving into the area (likely due to limited job and housing options) the population will continue to age and further challenge the employers and other systems in the town. Lack of an adequate supply of workforce related housing exacerbates this problem.
  - Older business owners may be looking for avenues to sell their business to a successor but do not have specific knowledge of this process or have anyone local who may be interested in operating their establishment. Another challenge to business succession planning is the high seasonality of Provincetown’s economy. This can negatively affect the attractiveness of certain businesses, limiting the ability of shop owners to retire.
  
- **The median income in Provincetown is \$57,000 per year.**
  - The median income in Provincetown is \$14,000 less than the rest of Barnstable County.
  - Provincetown workers are limited by their earning potential in seasonal jobs to afford the housing options in town. The dearth of affordable housing options makes it challenging for businesses to attract and retain workers.
  
- **Housing is extremely expensive, and the market is being driven by second home owners.**
  - The high demand and limited amount of housing has created a situation where the units are extremely expensive and continuing to increase. With impacts being felt by AirBnB properties, second home ownership, and infrastructure capacity issues, housing is an issue that is directly impacting economic development.
  - The seasonal, primarily service industry jobs that are in Provincetown do not make it possible for those who are working in Provincetown to live in Provincetown, and the impact of limited or challenging transportation options exacerbates the issue. 64% of renters were spending over 35%

of their income on rent in 2015 and 40% of renters spent over 50% of their income. Housing affordability in Provincetown has continued to worsen since 2010.

- Two recent reports have come out related to housing in Provincetown that highlight the situation, including “Housing on Cape Cod: The High Cost of Doing Nothing” prepared by the Housing Assistance Corporation and Understanding the Housing Needs and Challenges Facing Provincetown, Massachusetts” completed by the UMass Dartmouth Public Policy Center. Both studies acknowledge that the housing situation is being driven by forces that make it financially feasible for owners to rent out for short time frames (seasonal, weekly, etc.) as opposed to a year-round lease. This situation leaves limited rental housing options and prices out the vast majority of those working in the town.
  - In sum, housing, income and demographic challenges are constraining the economy as businesses struggle to find employees to work at their establishments creating severe labor shortages.
- **The town’s largest industries are the Accommodation and Food Services and Retail Trade with a combined 1,500+ workers in 2018. Health Care and Social Assistance is the next largest industry.**
    - The data and assessment of the area make it clear that an extremely high number of the jobs in the town rely either directly or indirectly on the influx of visitors and people during the summer season.
    - The service sector jobs tend to pay less than other industries, which brings down the average income levels of those who are working in town. This reinforces the disconnect between the low earnings of those who work in town and the higher earnings of those who live or vacation in town.
    - To create more stability, higher average annual earnings for those in the tourism industry, and create more overall economic activity, the tourism season needs to be extended. Increasing the attractiveness of Provincetown in the non-summer months will require a coordinated approach between lodging, restaurants, retailers, and event planners to make coming to the town in the off-season desirable for the traveler who has so many other options. It may in fact be that “extending the season” means “repurposing the visitation focus of non-peak months” through additional venues amenities, and initiatives such as event/conference space or education/learning based visitation.
    - Health Care and Social Assistance is projected to grow, a local and national trend as the population continues to age. Finding ways to support workers in this industry through training and housing options will be critical to ensuring that the needs of the population are able to be met. The location of Provincetown makes it difficult to access a wide variety of health care providers, so ensuring that tele-health options are available will help meet the need for specialization without having to travel to Boston or elsewhere.
  - **A high percent of local workers report being self-employed.**
    - Nearly 250 workers, 9% of all workers, report being self-employed.
    - This is higher than those who report being self-employed in the state and the nation.
    - Finding ways to support these self-employed individuals through trainings, helping them find space, access to capital, and networking/collaboration opportunities will be critical to expanding their work and financial feasibility.

In conclusion, the Town of Provincetown has a number of significant challenges when it comes to creating a more year-round, higher wage, diverse and therefore sustainable economy, including issues that are not traditionally considered to be economic development, such as housing. While the challenges are clear the specific solutions will not be easy, as they require an “impetus for change” among residents, property owners, and stakeholders. Provincetown is a beautiful community with many high quality of life attributes in a region (Cape Cod) with the same



strengths. While there are challenges, overall things are “not all that bad” for many property owners, residents and visitors. Therefore, education and engagement around clear and focused understanding and strategies will need to occur.



## Introduction

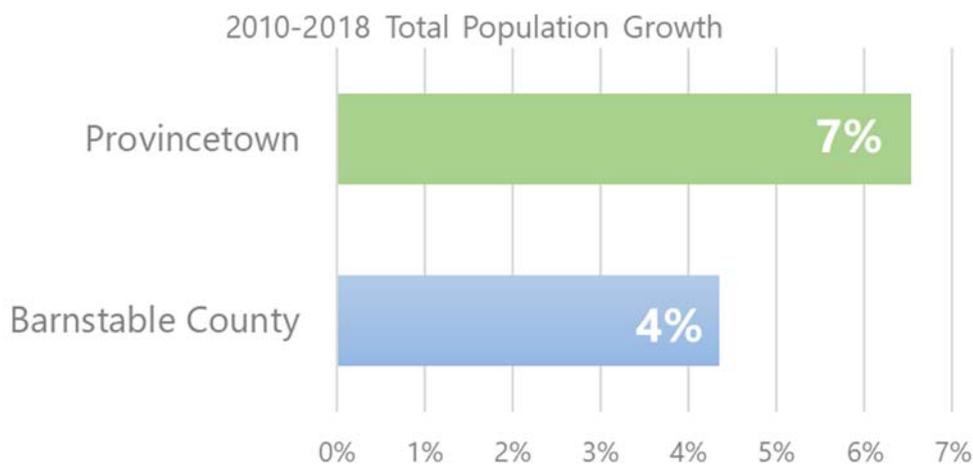
As a first step in crafting an Economic Development Strategic Plan, it is crucial to understand the basic socioeconomic factors that are impacting residents, businesses, and the opportunities for the future. The Public Policy Center at UMass Dartmouth conducted a thorough analysis of the economic factors that impact Provincetown in their report “A Baseline Assessment of Economic Conditions in Provincetown, Massachusetts” and so for this work a more concentrated analysis was conducted to understand how the demographics and industry trends impact opportunities in Provincetown. The following is a summary of the data collected in the previous reports with an eye towards how it impacts economic development in the region.<sup>1</sup>

## Demographics

### Population Growth

According to the Baseline Assessment, Provincetown and Cape Cod have both experienced notable population growth between 1970 and 2000; however, this was followed by a period of decline between 2000 – 2010 (UMass, 2017). Over the past eight years this trend has slightly reversed again. Within Provincetown, the population has grown since 2010. In 2010, about 2,940 people lived in the town and currently over 3,130 people reside in Provincetown. Within the town, the population grew at 7% over the past eight years, which is three percentage points higher compared to 4% growth in Barnstable County. This is good news for the town’s economy because despite the high levels of tourism, the increase in population shows **people are interested in staying in the town beyond just visiting for vacation and are able to find housing to be able to do so**. The trend of population growth in the town is projected to continue, growing by another 3% by 2023, adding an additional 80 residents.

Figure 1: 2010-2018 Total Population Growth in Town and County



### Age Distribution

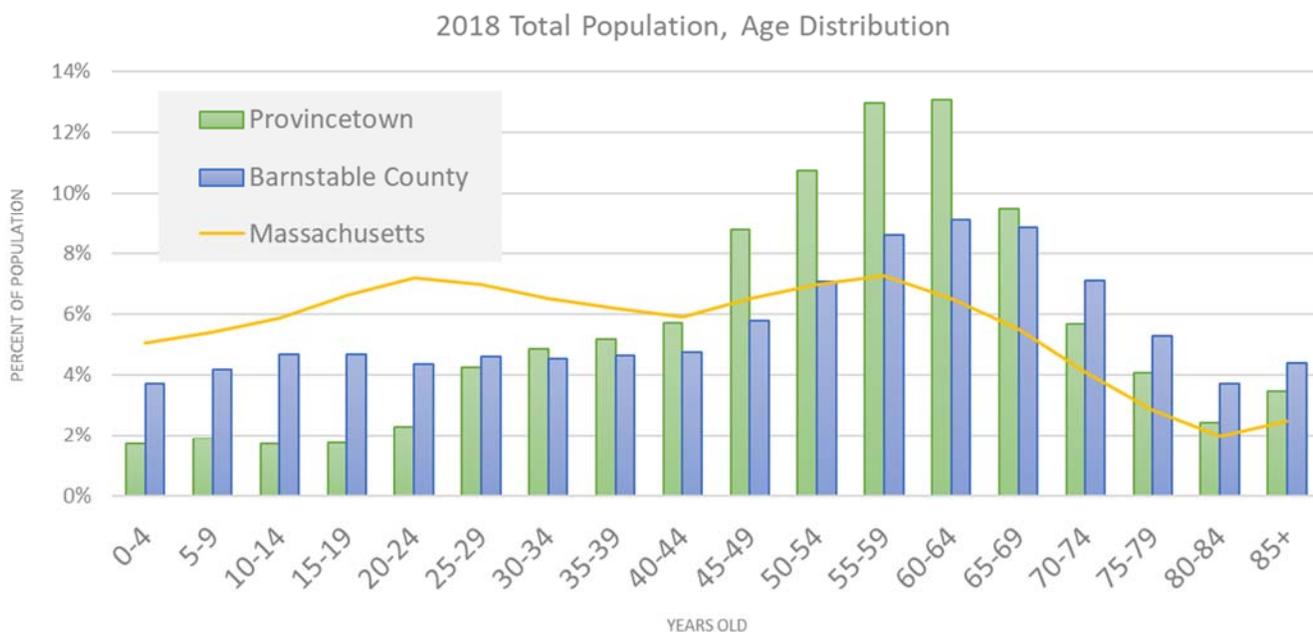
As noted, the population in the town is growing, however, the age distribution of residents is unique compared to that of the county and the state. In particular, the town has a much higher proportion of older residents. About 46% of residents are between the ages of 45 – 65, resulting in about **71% of the population being over 45 years old**, which is ten percentage points higher than the

Source: Esri, U.S. Census

<sup>1</sup> This analysis includes mostly data collected from the UMass Dartmouth Public Policy Center report with some additional data from proprietary data sources, such as EMSI.

county and 26 percentage points higher than the state. Compared to the Cape Regions (Upper, Mid, Lower, and Outer), as defined in the Baseline Assessment, the Outer Cape has the largest share of residents over the age of 45 at 70%, whereas the Upper Cape has the highest share of residents ages 24 and younger (UMass, 2017). Similarly, median age in Provincetown is two years older than Barnstable County, and 15 years older than across all of Massachusetts. **Catering to the needs and preferences of an older population is imperative for the success of Provincetown’s economy.**

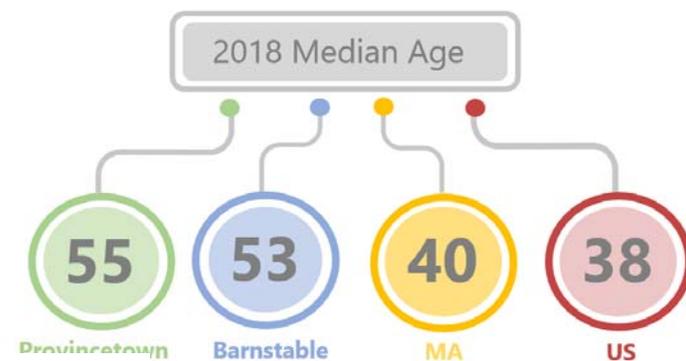
Figure 2: 2018 Total Population Age Distribution in the Town, County, and State



Source: Esri

Similarly, median age in Provincetown is two years older than Barnstable County, and 15 years older than across all of Massachusetts. **Catering specifically to the needs and preferences of an older population is imperative for the success of Provincetown’s economy.**

Figure 3: 2018 Median Age in the Town, County, State and US



Source: Esri

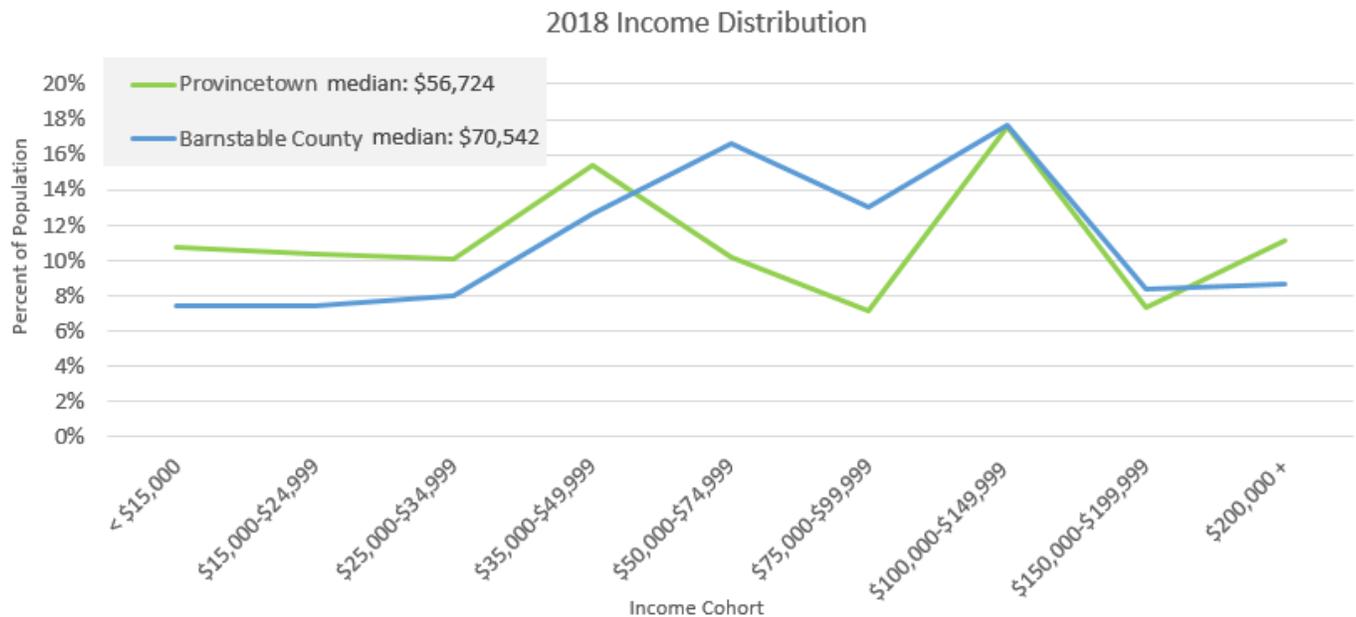
*Income*

As noted in the Baseline Assessment, per capita income increased in Barnstable County by over 8% from 2000 to 2015, this is much higher than the increase of 3% across the state (UMass, 2017). Additionally, since 2009, the per

capita income of the Cape region has been slightly higher than MA and was over 2% higher than the MA per capita income in 2015 (UMass, 2017).

Currently, the median income in Provincetown is just under \$57,000; which is nearly \$14,000 lower than the median income of the county. As shown in the current income distribution, the percentage of the population with incomes ranging from \$50,000 - \$99,999 is higher in the county than in the town. Similarly, the percentage of the population earning less than \$15,000 - \$34,999 is notably higher in the town than the county. This is due in part to the high number of service-related tourism jobs within the accommodations, retail, and restaurant sectors.

Figure 4: 2018 Income Distribution for the Town and County



Source: Esri

### Educational Attainment

The population over the age of 25 in Provincetown is highly educated. As noted in the Baseline Assessment, a higher percentage of Barnstable County’s residents, 70%, have college experience, including some college, associates degrees, bachelor’s degrees, and graduate degrees, in comparison to Massachusetts at 64% (UMass, 2017). Additionally, Provincetown has an even higher percentage of residents with college experiences at 76%, six percentage points above the county and ten above the state (Esri). Within Provincetown, there is also a significant percentage of the population with graduate/professional degrees, over 23%, compared to just under 19% in the county.

As noted in the Baseline Assessment, within the town, the share of residents with a bachelor’s degree increased by over six percentage points from 2000 to 2015. Similarly, residents with a graduate or professional degree increased by over seven percentage points (UMass 2017). At the same time, the share of residents who did not complete high school decreased by 8.5 percentage points (UMass 2017).

## Tapestry Segmentation

In general, and on a national level, the population is sometimes described in different “tapestry segments,” in other words, groups of the population will have specific characteristics and preferences. Although not all people will resemble these characteristics, these segments are helpful generalizations to better understand tendencies on average, across the nation, of different population groups. As shown in the graphic below, the largest percentage of the population in Provincetown is considered Rural Resort Dwellers, at 36%, this comes as no surprise seeing as how the median age of this population group is just about 54 years old and have an affinity toward second homes. The four estimated population groups that are used to describe Provincetown have similarities. Firstly, two of the four population groups, Emerald City and Trendsetters, are called out specifically as being **socially and environmentally conscious**, therefore businesses in Provincetown should integrate this preference in selling goods, when possible. Secondly, three of four groups, Emerald City, Trendsetters, and Golden Years are labeled as technology-users, whether that be smartphones or at-home desktops, having **accessible and reliable broadband** in Provincetown is important to a majority of the population.

### Rural Resort Dwellers, 36%



**Median Age: 54.1**  
**Median HH Income: \$50,400**

Living mostly in owner-occupied, single-family homes, and strong market for second homes, valued near the US median. *Over half of the housing units are vacant due to a high seasonal vacancy rate.* 42% of households consist of married couples with no children at home, while another 28% are single person. Married couples with children at home have older school-age children. They're close to retirement, simplicity and modesty characterize residents.

### Emerald City, 26%



**Median Age: 37.4**  
**Median HH Income: \$59,200**

Residents mostly live in older, neighborhoods with homes built before 1960; about half of homes are renter-occupied. Median home value and average rent are slightly above the US levels. Single, nonfamily types make up over half of these households. Well-educated, environmentally friendly purchasers, conscious of nutrition, and avid cell phone users, describe this population. they enjoy arts, music, and learning new things.

### Trendsetters, 20%



**Median Age: 36.3**  
**Median HH Income: \$63,100**

Singles, living alone or with roommates or partners, more than 75% rent in upscale, multiunit structures. These residents are young and well educated; more than half have a bachelor's degree or more. Residents travel often, exploring destinations and experiences. Socially and environmentally conscious, they pay more for products that support their causes. Up-to-date on technology, they explore and exploit all the features of their smartphones.

### Golden Years, 18%



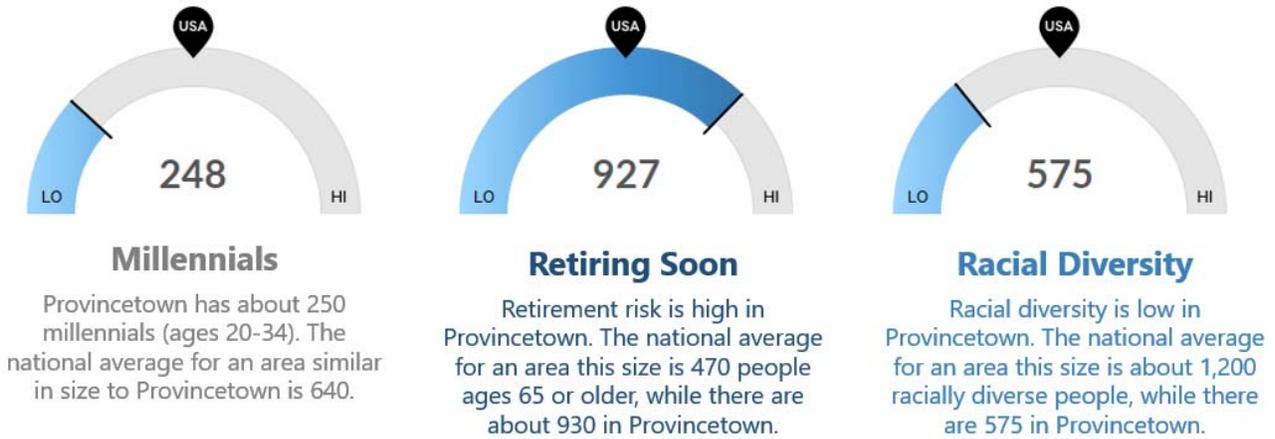
**Median Age: 52.3**  
**Median HH Income: \$71,700**

This older market has a median age of 52 years and nearly 32% of residents aged 65 years or older. Single-person households (over 40%) and married-couple families with no children (one-third) dominate these neighborhoods. These consumers are well connected: Internet access is used for everything from shopping or paying bills to monitoring investments and entertainment. They are generous supporters of the arts and charitable organizations.

### Characteristics Comparison

Compared to other regions similar in size to Provincetown, the number of Millennials (people between the ages of 20 – 34) is notably low, whereas people nearing retirement age (ages 65 and over) is notably high. **Although it will be important for Provincetown to position itself as a viable region for Millennials to live, it is equally if not more important for the town to focus effort and resources into serving the current demographic characteristics of the town.**

Figure 5: Population Metric Comparisons for the Town



Source: Esri

## Provincetown Housing Tenure



Source: Esri

## Housing

### Housing Tenure

Over the past 20 years, Provincetown has continued to have much higher housing costs than Barnstable County, Boston, and Massachusetts (UMass, 2017). Provincetown has a high percentage of vacant units throughout the year due to the town being a tourist-destination, at 60% compared to 40% in the county. Additionally, housing costs in the town are high compared to other regions in MA. According to UMass Dartmouth, in 2016, the median price per square foot was 121% higher than in Barnstable County and 150% higher than the state; costs in the town are even higher than in Boston by about 16%.

Provincetown, Massachusetts has seen some severe housing affordability challenges. With a current median household income of \$43,000, the median value of a single-family home is a disproportionate \$790,000.

Housing costs account for a significant percentage of household income. In Provincetown, 64% of renters spent over 35% of their income on rent in 2015,

which is about 14 percentage points higher than the number of renters spending that much of their income on rent across the state (UMass, 2017). **Furthermore, nearly 40% of renters spent over 50% of their income on rent** (UMass, 2017); this is over 20 percentage points higher than the traditional estimate of generally spending being no more than 30% of monthly income on housing. Housing costs are considered burdensome when they are above 35%, and the majority of Provincetown renters are spending that or higher (UMass, 2017). **According to data laid out in the Baseline Assessment, housing affordability in Provincetown has continued to worsen since 2010.**

Not only has affordability continued to be an issue, but, no significant change in the number of housing units occurred within the town between 2009 and 2015; during this time the only notable change was an increase in multi-unit buildings which was likely a result of condominium conversions (UMass, 2017). Since 2007, there have been over 720 condo conversions in the town (UMass, 2017). The Town recognizes this as a significant limitation and is taking steps to combat the issue. Recently, a report released by the Housing Assistance Corp., titled "Housing on Cape Cod: The High Cost of Doing Nothing," showed that the average rent for a room in a house was over \$700 a month, the average studio rent was around \$1,000 a month, and renting a three-bedroom home at nearly \$1,900 (Fraser, 2018). Much of the focus of the report was on workers who make too much to qualify for affordable-housing programs but not enough to afford market rents (Fraser, 2018).

The report noted that the Town is experiencing a shortage of housing that is negatively affecting the economy because employers struggle to both locate housing to attract new employees and keep current employees living on the Cape with reasonably priced housing options. The report notes that, labor shortage and increasing costs for paying workers higher wages, particularly at entry level jobs, equates to even higher costs for other goods and services like health care and for everyday goods (Fraser, 2018).

Because of the demand and town characteristics, Provincetown identified three categories of housing need, and has continued to create specific benchmarks within each of the following:

- **Affordable Housing:** to provide year-round housing for very low/low/moderate income individuals, at or below 50%, 65%, 80% of Area Median Income (Barnstable County AMI is ~\$77K). To date, 179 rental units and 46 owner units have been built, however, is a continued and growing demand.
- **Community Housing:** which provides year-round median/middle income – 80%-160%, of Barnstable County AMI. To date, 5 rental units and 8 owner units have been built for this purpose.
- **Seasonal Workforce Rental Housing:** this currently has no formal programs in place, but the Town is talking to businesses about strategies to implement in the future. This will be an imperative strategy in order to continue the growth and success of the tourism industry.

### *Housing Permits*

The following two tables show the number of housing unit building permits that were distributed per year, by unit type, within Provincetown and Barnstable County between 2010-2017. Note that cells showing a dash indicate no permits were issued. Within Provincetown, the number of housing unit building permits has kept a steady trend of 10 in total per year between 2014-2017. This however is much lower than previous estimates, between 31-46 during the years from 2010-2013. This is consistent with the common theme of lacking housing options in the town. The trend within Provincetown, however, does not mirror what is happening in the county. Instead, within Barnstable county, 2017 saw the highest number of housing unit permits distributed at over 870, this is up from between 400-640 between 2010-2016.

Table 1: Provincetown, Housing Unit Building Permits, 2012-2017

Provincetown, Housing Unit Building Permits, 2010-2017								
Type of Unit Structure	2010	2011	2012	2013	2014	2015	2016	2017
Single-Family	20	14	16	1	11	10	11	2
All Multi-Family	13	17	25	45	-	-	-	8
2-unit Multi-Family	-	-	-	2	-	-	-	8
3- and 4-unit Multi-Family	-	-	-	3	-	-	-	-
5+ Unit Multi-Family	13	17	25	40	-	-	-	-
Total Units	33	31	41	46	11	10	11	10

Source: HUD

Table 2: Barnstable County, Housing Unit Building Permits, 2012-2017

Barnstable County, Housing Unit Building Permits, 2012-2017								
Type of Unit Structure	2010	2011	2012	2013	2014	2015	2016	2017
Single-Family	381	342	410	425	530	550	495	489
All Multi-Family	37	62	182	171	110	22	10	382
2-unit Multi-Family	-	8	24	4	4	10	10	10
3- and 4-unit Multi-Family	3	7	28	59	15	6	-	-
5+ Unit Multi-Family	34	47	130	108	91	6	-	372
Total Units	418	404	592	596	640	572	505	871

Source: HUD

## Economy

### Top Industries by Employment

As noted in the Baseline Assessment, Provincetown is a summer tourist destination, and the economy in is highly seasonal. The number of Provincetown residents who are employed fluctuates 25% every year from about 1,600 in the winter, to about 2,000<sup>2</sup> in the summer (UMass, 2017). Provincetown's economy is highly-reliant on seasonal tourism, this has a notable effect on the industries, occupations, and earnings by job in the town. The seasonal nature of work helps tourism-related industries thrive, however, can pose as a barrier to success for certain year-round professional industries that rely on a broad workforce and broad consumer base.

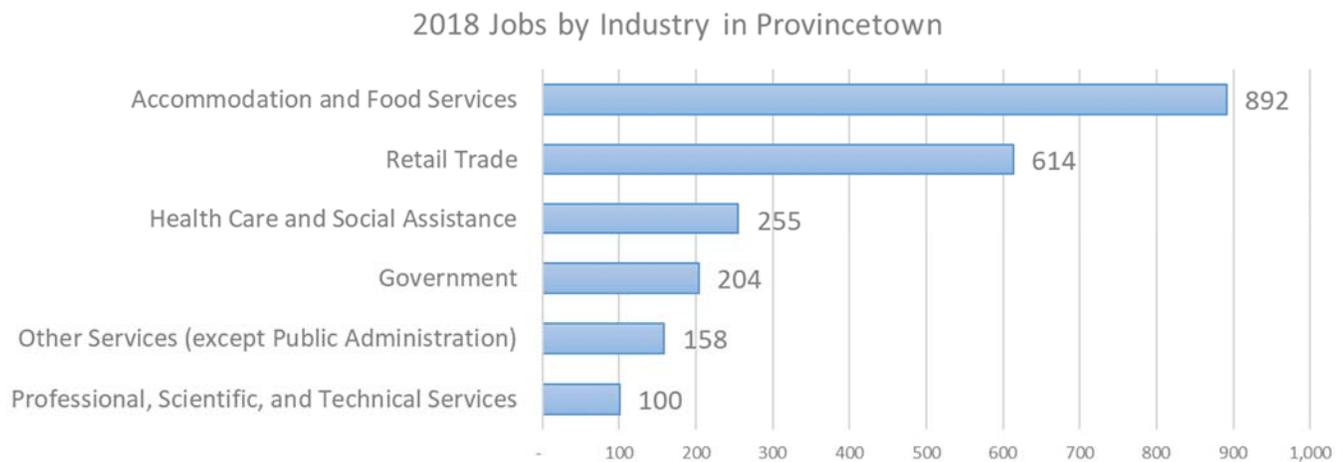
Currently, we estimate that there are just under 2,700 jobs located within Provincetown (employees may or may not be town residents). Six industries employ 100 workers or more in the town, with the largest industry employers being Accommodation and Food Services followed by Retail Trade, collectively employing over 1,500 workers. Also noted in the Baseline Assessment, the size of the tourism-related industry cluster is far larger than all other industry clusters in the town (UMass, 2017). Other industries of note include Health Care and Social Assistance; Government; Other Services;<sup>3</sup> and Professional Scientific and Technical Services. The occupations associated with the top

<sup>2</sup> Estimated within the Baseline Assessment created by UMass, monthly employment was measured between 2010-2017.

<sup>3</sup> According to the BLS, establishments engaged in providing services not specifically provided for elsewhere in the classification system. Establishments in this sector are primarily engaged in activities, such as equipment and machinery repairing, promoting or administering religious activities, grantmaking, advocacy, and providing dry-cleaning and laundry services, personal care services, death care services, pet care services, photofinishing services, temporary parking services, and dating services.

industries are mostly service-related occupations connected to the tourism sector, however, with notable growth in the health care sector, there is also growth in medical-related occupations as well (UMass, 2017).

Figure 6: 2018 Jobs by Top Industries in Provincetown



Source: EMSI

Health Care and Social Assistance accounted for over 250 jobs in 2018 and is projected to grow significantly, adding 44 jobs over the next five years. This trend is not unique to Provincetown. Many regions across the county are facing an increase in demand for Health Care and Social Assistance jobs. However, despite the commonality of this trend, it may be of more significance in the town due to the population age distribution. **The high proportion of older people living in the Provincetown will eventually mean a high demand for high-quality health care infrastructure.**

Considering an aging population and new innovations in the provision of health care, Provincetown may want to explore options in supporting a wide variety of health care options such as convenient care options. Small-scale, specialty clinics that provide convenient and low-cost care provide an alternative to a full-scale hospital facility. Supporting “telehealth” is a strategy for patients to access and increase self-care while potentially reducing office visits and travel time.<sup>4</sup> Embracing these health care alternatives can have positive impacts on quality of life and overall community health.

<sup>4</sup> Top 10 health care innovations, Deloitte



Since 2013, Provincetown has added just under 150 jobs, a 6% increase in growth. This trend is projected to slow over the next five years with only 23 jobs projected to be added, growing at a marginal 1%. As noted, the Health Care and Social Assistance industry is well-positioned for growth considering the age distribution of the town. Additionally, the Arts, Entertainment, and Recreation industry has shown steady growth over the past five years and is projected to continue growing. **Promoting growth in this industry would provide residents and visitors additional activity options both during summer seasons, and winter months.**

Table 3: Historic and Projected Jobs by Industries in Provincetown

Industries in Provincetown, 2013-2023								
NAICS	Description	2013 Jobs	2018 Jobs	2023 Jobs	2013 - 2018 Change	2013 - 2018 % Change	2018 - 2023 Change	2018 - 2023 % Change
72	Accommodation and Food Services	846	892	893	46	5%	1	0%
44	Retail Trade	611	614	589	3	0%	(25)	(4%)
62	Health Care and Social Assistance	211	255	284	44	21%	29	11%
90	Government	201	204	204	3	1%	-	0%
81	Other Services (except Public Administration)	159	158	165	(1)	(1%)	7	4%
54	Professional, Scientific, and Technical Services	96	100	101	4	4%	1	1%
71	Arts, Entertainment, and Recreation	77	84	89	7	9%	5	6%
53	Real Estate and Rental and Leasing	60	69	71	9	15%	2	3%
48	Transportation and Warehousing	46	60	58	14	30%	(2)	(3%)
52	Finance and Insurance	55	60	61	5	9%	1	2%
51	Information	51	47	42	(4)	(8%)	(5)	(11%)
56	Administrative and Support and Waste Management and Remediation Services	47	47	47	-	0%	-	0%
11	Agriculture, Forestry, Fishing and Hunting	17	32	37	15	88%	5	16%
23	Construction	21	24	24	3	14%	-	0%
42	Wholesale Trade	19	16	16	(3)	(16%)	-	0%
	<b>Total</b>	<b>2,526</b>	<b>2,673</b>	<b>2,696</b>	<b>147</b>	<b>6%</b>	<b>23</b>	<b>1%</b>

Note: Only industries employing 10 people or more are shown in the table

Source: EMSI

As noted in the Baseline Assessment, in addition to a strong tourism sector and growing health care sector, Provincetown is also strong in transportation and warehousing. The LQ in this sector is 37.0 showing significant concentration, which can be attributed to the municipal airport (UMass, 2017).

Also noted in the Baseline Assessment, the top five fastest growing industry clusters include (1) Hospitality and Tourism, (2) Marketing, Design & Publishing, (3) Business Services, (4) Financial Services, and (5) Distribution & Electronic Equipment (UMass, 2017). Cumulatively, these clusters added about 50 jobs between 2010 – 2015 (UMass, 2017).

#### Self-Employment in Provincetown

Within the town, nearly 250 individuals, 9% of all workers, report being self-employed. the percentage of self-employed workers compared to all workers is higher in Provincetown than in the state and the nation, both with 6% of workers reporting as self-employed. Within the town, industries with the highest number of self-employed

workers include Retail Trade with 50 workers, Other Services (except Public Administration) with 34, and Professional, Scientific, and Technical Services with 27 workers. Within the town there is a significant number of self-employed workers in Agriculture, Forestry, Fishing and Hunting, which was also noted as an industry of specialization in the town, according to the Baseline Assessment.

Table 4: Self-Employed Workers by Industry in Provincetown, The State, and the US

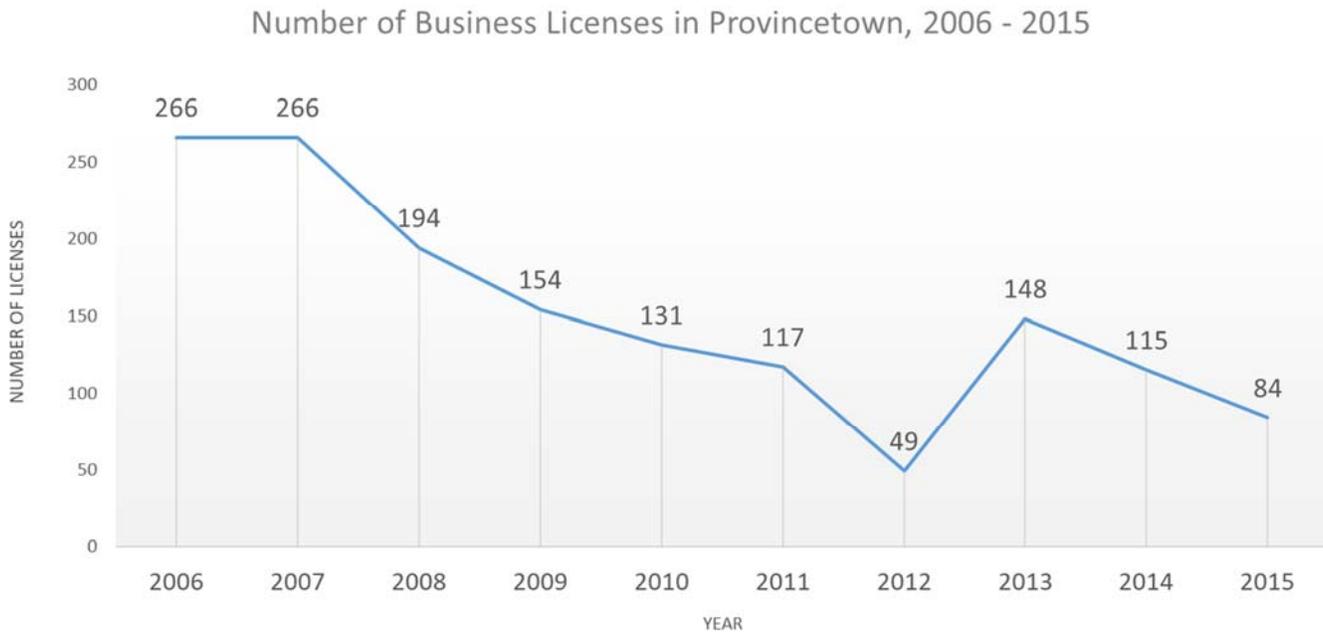
Self-Employed Workers by Industry in Provincetown Compared to State and Nation, 2018					
NAICS 2-digit	Description	Self-Employed Workers	Percent Self-Employed	MA Percent Self-Employed	USA Percent Self-Employed
11	Agriculture, Forestry, Fishing and Hunting	23	72%	28%	27%
71	Arts, Entertainment, and Recreation	23	27%	18%	17%
54	Professional, Scientific, and Technical Services	27	27%	12%	12%
56	Administrative and Support and Waste Management and Remediation Services	12	25%	9%	9%
53	Real Estate and Rental and Leasing	16	24%	19%	18%
51	Information	10	22%	3%	6%
81	Other Services (except Public Administration)	34	22%	22%	23%
62	Health Care and Social Assistance	22	8%	4%	4%
44	Retail Trade	50	8%	3%	4%
72	Accommodation and Food Services	11	1%	1%	2%
	<b>Total</b>	<b>248</b>	<b>9%</b>	<b>6%</b>	<b>6%</b>

Note: Only industries with 10 or more self-employed jobs in the Provincetown in 2018 are shown

Source: Emsi

According to the Baseline Assessment, the Town has approved just over 1,500 new business licenses between 2006 – 2015 (UMass, 2017). A notable portion of business licenses, 35%, were awarded within the first two years, 2006 and 2007. Both years saw 266 new business licenses approved. In 2012, the Town experienced an all-time low in approvals at only 49, this was followed by an increase to nearly 150 in 2013. However, since 2013, the number of new approved business licenses has been on the decline (UMass, 2017).

Figure 7: Number of Business Licenses in Provincetown, 2006-2015



Source: UMass Baseline Assessment

Of new business licenses in 2014 and 2015, the largest number, at 69 licenses, were awarded to businesses operating in transportation, which demonstrates the small businesses supporting the Transportation and Warehousing industry (UMass, 2017). This was followed by retail licenses at 45, and food services licenses at 33 (UMass, 2017). These business licenses can likely be attributed to the tourism-related industry.

As of 2015, there were just over 790 people both living and working within Provincetown. There were an additional nearly 760 individuals employed in Provincetown but living somewhere outside of the town, and an additional 600 people living in Provincetown and employed somewhere outside of the town. This commuter inflow and outflow is depicted below. (Please note: arrows do not indicate exact direction, instead indicate general inflow and outflow.) Noted in the Baseline Assessment, Barnstable County residents who are employed elsewhere earn higher wages than outside workers employed within the region, while people working and living in Barnstable County earn wages lower than both groups (UMass, 2017). Similarly, Workers who are employed in Provincetown but live outside, earn more than residents of Provincetown working within the town and elsewhere (UMass, 2017). This can be due in part to the large number of service-related occupations that serve the tourism industry. In addition, people living in Barnstable County but are employed elsewhere earn higher wages than those who are living outside of the county but working within the county (UMass, 2017). Comparatively, people living and working within Barnstable County earn lower wages than both groups (UMass, 2017). **Due in part to commuter inflow and outflow, high median age, and high educational attainment level of people living within Provincetown, coupled with the strong tourism economy, we infer that Provincetown is exporting skilled workers in professional industries and importing unskilled workers to support accommodations, food services, and retail.**

Figure 8: Commuter Inflow and Outflow, Provincetown



The majority of residents, approximately 61%, within the town traveling from home to work, travel less than 10 miles to work. However, there is a notable percentage of people, 17%, who travel over 50 miles to work.

Similarly, the majority of workers, approximately 58%, within the town traveling from work to home, travel less than 10 miles to work. However, there is an even spread between having 13% travel between 10 -24 miles, 15% between 25 – 50 miles and 14% traveling over 50 miles.

Figure 9: Provincetown Jobs by Direction, Home to Work, 2015

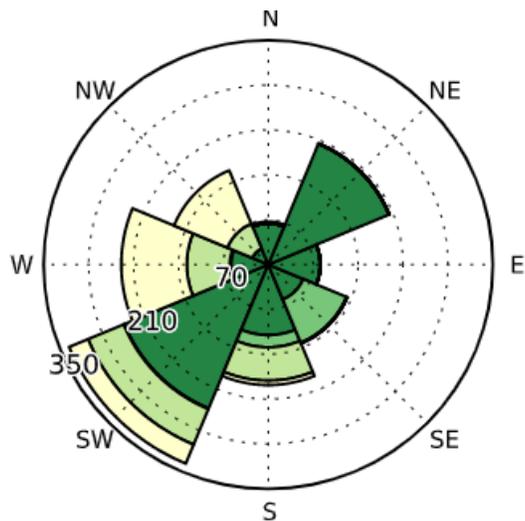


Table 5: Provincetown Jobs by Distance, Home to Work, 2015

Jobs by Distance - Traveling from Home to Work, 2015		
	Count	Share
Less than 10 miles	846	61%
10 to 24 miles	95	7%
25 to 50 miles	222	16%
Greater than 50 miles	234	17%
<b>Total</b>	<b>1,397</b>	<b>100%</b>

Source: Census OnTheMap

Source: Census OnTheMap

Table 6: Provincetown Jobs by Distance, Work to Home, 2015

Jobs by Distance - Traveling from Work to Home, 2015		
	Count	Share
Less than 10 miles	893	58%
10 to 24 miles	207	13%
25 to 50 miles	227	15%
Greater than 50 miles	223	14%
Total	1,550	100%

Source: Census OnTheMap

As noted in the Baseline Assessment, employment interchange levels between Provincetown and other communities is high, particularly in Truro, Wellfleet, Barnstable, Boston, and Eastham (UMass, 2017). Knowing commuting patterns of workers and employment interchange levels would suggest that shared services among the regional communities could generate efficiencies for residents, workers, and visitors alike.

Despite exporting skilled workers, the labor force participation rate in the town was high in 2016, reaching just over 63%, this is over three percentage points higher than the county. Oppositely, the unemployment rate in the town was notable higher than the county and state at nearly 9% in 2016. **This may indicate that more people living in Provincetown would pursue the opportunity to work in Provincetown if the option became available.**

Table 7: Economic Indicators, 2016

Economic Indicators, 2016		
	Labor Force Participation Rate	Unemployment Rate
Provincetown	63.2%	8.9%
Barnstable County	60.0%	6.3%
Massachusetts	67.5%	6.8%

Source: American Community Survey (ACS) 1-year estimates, Table S2301

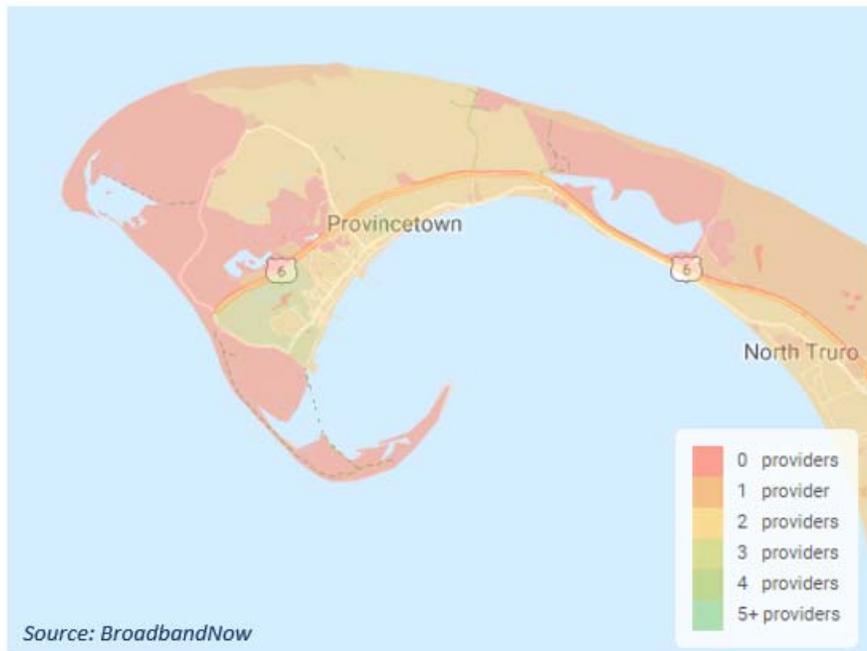
### Taxes

The Baseline Assessment reports that inflation-adjusted sales, room, and meals tax payments have consistently increased over time, suggesting that tourism is increasing, prices are rising faster than inflation or possibly both (UMass, 2017). Also, according to the Baseline Assessment, state tax collections show a consistent increase from 2004 – 2014. Consistent with other data displaying the seasonality of Provincetown’s economy, more sales are made in the summer months than others (UMass, 2017). Additionally, offseason sales have increased at an average annual growth rate of nearly 7%, while sales increase at an average annual growth rate of nearly 5% during peak months (UMass, 2017). The increase in sales during off-peak months shows potential for honing winter-tourism.

Broadband

**To provide for both business endeavors and resident preferences, it is imperative that Provincetown have adequate broadband coverage.** As shown in the map image below, a large portion of the town has access to between one and two internet providers, however, some portions of the town do not have access to any residential internet providers. For those who do have access, the average download speed in Provincetown is 49.39 Mbps which is about 10% faster than the average in Massachusetts and 20% faster than the national average, according to BroadbandNow.

Figure 10: Internet Providers, Provincetown



## Attachment A: Data Sources

### Proprietary Data Sources



#### Economic Modeling Specialists International (EMSI)

To analyze the industrial makeup of a study area, industry data organized by the North American Industrial Classification System (NAICS) is assessed. Camoin Associates subscribes to Economic Modeling Specialists Intl. (EMSI), a proprietary data provider that aggregates economic data from approximately 90 sources. EMSI industry data, in our experience, is more complete than most or perhaps all local data sources (for more information on EMSI, please see [www.economicmodeling.com](http://www.economicmodeling.com)). This is because local data sources typically miss significant employment counts by industry because data on sole proprietorships and contractual employment (i.e. 1099 contractor positions) is not included and because certain employment counts are suppressed from BLS/BEA figures for confidentiality reasons when too few establishments exist within a single NAICS code.



#### Esri Business Analyst Online (BAO)

ESRI is the leading provider of location-driven market insights. It combines demographic, lifestyle, and spending data with map-based analytics to provide market intelligence for strategic decision-making. ESRI uses proprietary statistical models and data from the U.S. Census Bureau, the U.S. Postal Service, and various other sources to present current conditions and project future trends. Esri data are used by developers to maximize their portfolio, retailers to understand growth opportunities, and by economic developers to attract business that fit their community. For more information, visit [www.esri.com](http://www.esri.com).



#### CoStar

CoStar is the leading source of commercial real estate intelligence in the U.S. It provides a full market inventory of properties and spaces—available as well as fully leased—by market and submarket. Details on vacancy, absorption, lease rates, inventory, and other real estate market data are provided, as well as property-specific information including photos and floor plans. CoStar covers office, retail, industrial, and multifamily markets. CoStar data is researched and verified by the industry's largest professional research team. With 1,200 researchers and 130 field research vehicles, CoStar's team makes calls to property managers; reviews court filings, tax assessor records and deeds; visits construction sites; and scans the web to uncover nearly real-time market changes. More at [www.costar.com](http://www.costar.com).



#### IBISWorld

IBISWorld is one of the world's leading publishers of business intelligence, specializing in industry and procurement research. Through its detailed industry reports available at 5-digit NAICS level, IBISWorld provides insight into market conditions for targeted industries, helps to identify major suppliers or supply chain, and provides an understanding of competitor activity. More at [www.ibisworld.com](http://www.ibisworld.com)

## Public Data Sources



### American Community Survey (ACS), U.S. Census

The American Community Survey (ACS) is an ongoing statistical survey by the U.S. Census Bureau that gathers demographic and socioeconomic information on age, sex, race, family and relationships, income and benefits, health insurance, education, veteran status, disabilities, commute patterns, and other topics. The survey is mandatory to fill out, but the survey is only sent to a small sample of the population on a rotating basis. The survey is crucial to major planning decisions, like vital services and infrastructure investments, made by municipalities and cities. The questions on the ACS are different than those asked on the decennial census and provide ongoing demographic updates of the nation down to the block group level. For more information on the ACS, visit <http://www.census.gov/programs-surveys/acs/>



### OnTheMap, U.S. Census

OnTheMap is a tool developed through the U.S. Census Longitudinal Employer-Household Dynamics (LEHD) program that helps to visualize Local Employment Dynamics (LED) data about where workers are employed and where they live. There are also visual mapping capabilities for data on age, earnings, industry distributions, race, ethnicity, educational attainment, and sex. The OnTheMap tool can be found here, along with links to documentation: <http://onthemap.ces.census.gov/>.

## Economic Census

The Economic Census is the U.S. Government's official five-year measure of American business and the economy. It is conducted by the U.S. Census Bureau for years ending in '2' and '7'. The Economic Census is the most comprehensive source of information about American businesses from the national to the local level. Published statistics cover more than 1,000 industries, 15,000 products, every state, over 3,000 counties, 15,000 cities and towns, and Puerto Rico and other U.S. Island Areas. More at: <https://www.census.gov/programs-surveys/economic-census/about.html>.

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**Goal 1: Build and support entrepreneurship in Provincetown's Blue Economy.**

**Rationale: The Blue Economy has been and will continue to be a significant economic driver for Provincetown. Supporting entrepreneurship and small business development within the Blue Economy will result in a diversified economy, increased natural resource protection, and a more sustainable and year-round economy. Opportunities to cultivate a more entrepreneurial environment centered around the Blue Economy will generate spin-off opportunities that will create economic activity, raise the bar when it comes to research, and create the type of ecosystem that will drive other business activity.**

Lead and Partners: Town of Provincetown, Town of Truro, Bridgewater State, Cape Cod Community College, Center for Coastal Studies, International Fund for Animal Welfare, Johnson and Wales, K-8 schools, National Seashore, Stellwagen Bank National Marine Sanctuary, Woods Hole.

	Strategy	Action	Point & Team	Action
1.a	Expand Provincetown's recognition as a leader in Blue Economy education and research by engaging partners in collaboration.	i. Facilitate the establishment of a Blue Economy Task Force that oversees the various issues related to the waterfront including the waterfront district, aquaculture, harbor, pier, public and private organizations, and others. Identify opportunities for shared resources, collaborative approaches, and best practices.		EDC to schedule meeting of focus group for start-up
		ii. Engage with the Center for Coastal Studies, Stellwagen Bank National Marine Sanctuary, International Fund for Animal Welfare (IFAW), to understand their mid to long range plans and potential partnering opportunities.		EDC to schedule meeting of focus group for start-up
		iii. Support the Center for Coastal Studies in efforts to expand facilities and housing; assist with identification and attraction of research and development/commercialization and education partners including businesses, academic, and research institutions. Work to assist to address challenges such as housing and workforce needs.		EDC to invite Coastal Studies to meeting to see what we can do
		iv. Support research of the feasibility of establishing an accelerator for commercialization and economic growth related to coastal, maritime, and marine studies.		
1.b	Grow the Blue Economy by developing and improving resources to provide the region with quality aquaculture products.	i. Create a grower's association to oversee marketing and development of the industry in Provincetown that includes representation from all partners involved. Encourage growers association to identify and pursue synergies with shared resources like work platforms, nursery, hatchery, landing facilities, and more direct farm-to-table connections.		
		ii. Survey the business people about what types of amenities, services, and infrastructure/facilities would be most important to grow the aquaculture industry. Create inventory of potential sites for needed facilities. Examine practices and models elsewhere to develop the right model for Provincetown. Develop a financial feasibility analysis to measure the cost/benefit, necessary investments and ongoing operational costs. Put together necessary financing including a blend of private investment from industry, public town support, and other available funding.		
		iii. Implement the Harbor Plan recommendations.		
1.c	Develop the industry network and support entrepreneurs by aligning aquaculture investments by Provincetown with partners and programs	i. Grow the aquaculture industry in Provincetown through branding and increased Truro collaboration opportunities. Use regional partners to conduct a feasibility study of potential products to prevent a monoculture and increase diversity and resiliency.		EDC to schedule meeting of focus group for start-up
		ii. Establish appropriate training programs, business services, and investment in support of the industry including technical skills and infrastructure protection/improvements. Continued discussion with industry businesses about their needs and concerns.		
		iii. Research potential expansion of local landing capacity.		
		iv. Pursue resources and opportunities to find or create an established primary buyer dedicated to Provincetown and Truro.		
		v. Increase production through streamlined permitting, establishment of work floats, and development of fast growing and inexpensive seed.		

Measures of Success: Total number of product caught and served in Provincetown; Total number of establishments and employees in the industry

**Goal 2: Promote collaboration among Provincetown's tourism, education, culture, arts, and recreation assets.**

Rationale: Finding ways to support the business ventures of artists as well as the education and tourism potential related to these assets will continue to expand the visitor market while strengthening the existing art and culture economy and brand of Provincetown. Focusing resources on supporting the artists and their ability to be financially sustainable will further strengthen the economy and attract even more producers and consumers of arts and culture.

Lead and Partners: Town of Provincetown, Cape School of Arts, Castle Hill, Center for Coastal Studies, Chamber of Commerce, Fine Arts Work Center, Friends of the National Seashore, IB School System, National Seashore, PAAM, Pilgrim Monument and Provincetown Museum, Provincetown Business Guild, The Commons Visitor Services Board.

	Strategy	Action	Point & Team	Action
2.a	Increase sustainability of the tourism industry by strengthening efforts to develop Provincetown's brand among arts, culture, and recreation travelers.	i. Retain a third party facilitator to establish a strong and lasting workplan based on action items identified by the Town, Provincetown Business Guild, Chamber of Commerce, local and regional banks, and others who have a stake in creating more off-peak tourism.		EDC to schedule meeting of focus group for start-up
		ii. Continue to increase the arts and cultural offerings/events/attractions in town through funding targeted towards goals that align with economic development priorities, support of existing attractions, and cross-promotional opportunities. Priority funding should be given to efforts that exhibit some or all of the following: leverage funds by other partners including applicant, builds on the Town's core branding efforts, and has potential to increase economic activity that brings in outside spending. Incorporate regular public awareness efforts to expand education of grant program purpose and impact.		
		iii. Conduct targeted attraction work in the appropriate demographics related to the arts, cultural amenities, and related attractions. Encourage local resident artists and gallery owners to get involved on a larger scale with those in the industry to keep Provincetown at the forefront.		
		iv. Expand shoulder season offerings of walking tours, interpretive hikes, birding, bike rides, ecotours and more to capture visitors looking for an off-season experience of the many natural resources of Provincetown.		
2.b	Pursue and support development of a conference center to extend shoulder season economic activity, diversify the tourism economy, and create educational opportunities.	i. Form a working group with representation from the Town, Chamber of Commerce, and Provincetown Business Guild to develop a base outline and list of assumptions related to a potential conference center. Use this outline conduct an economic and fiscal impact analysis to understand and promote the impact of this type of project on the regional economy and local budgets.		EDC to schedule meeting of focus group for start-up
		ii. Conduct a community visioning session to guide development of a conference center that aligns with community design desires.		
		iii. Create an inventory of potential locations for the conference center and supporting amenities (lodging, restaurants, transportation, etc.). Identify the necessary infrastructure and financing necessary to complete the desired development project.		
		iv. Redevelop existing properties to be more modern and accommodate events. Initiate discussion with potential property owners to understand interest and plans.		
2.c	Continue to grow the strength of the arts and culture economy in Provincetown.	i. Conduct planning for the "next-level" need of art and culture related entrepreneurs emerging from existing business development incubators such as The Commons and elsewhere in the community		EDC to schedule meeting of focus group for start-up
		ii. Establish an art-centric accelerator that is focused on attracting arts-entrepreneurs to participate in a formal and intensive program that will support local artists, encourage more artists to join the community, build the local brand, and establish a more sustainable arts economy. Include both incubation and acceleration space as well as programming through coordination with The Commons and other organizations.		
		iii. Complete an art and design audit to inventory and define the creative economy in Provincetown. Use the findings of the inventory to start and continue conversation with artists and arts organizations around the needs of artists to maintain a sustainable arts economy and development of a suite of services. Consider opportunities for space, housing, equipment storage/rental, and micro-grants as supporting the underlying arts ecosystem that is enjoyed by so many different industries.		

Measures of Success: Total number of hotel beds; Total amount of short-term rental tax and occupancy tax revenue; gallery revenue

**Goal 3: Expand the housing options in Provincetown through innovative programs and land use policies.**

Rationale: Lack of housing options is a severe constraint on economic development opportunities and addressing this issue will require strategic and targeted approaches that build on best-practices being used around the country. Additional research and strategy development will be required to fully address these issues in a meaningful and lasting way.

Lead and Partners: Town of Provincetown, Town of Truro, Community Development Partnership, Community Housing Council, Homeless Prevention Council, Housing Assistance Corporation, Housing Authority, Mass Housing Partner, Year-Round Rental Housing Trust

	Strategy	Action	Point & Team	Action
3.a	Increase density allowance and increase public awareness work around why density and affordability are critical to the long-term sustainability of the town.	i. Conduct comprehensive review of zoning, land use regulations, permitting, and licensing and how they align with the goals of the community. Identify opportunities to provide clear guidance that limit costs and time overruns associated with development.		EDC to schedule meeting of focus group for start-up
		ii. Utilize community engagement events to explain and inform about the need, impact, and means of increasing density, affordability and community improvements.		
		iii. Create a substantial public awareness campaign for all property owners on assistance related to increasing the housing supply.		
3.b	Creation of dormitory housing to address seasonal worker housing issue and potential synergies with off-season education and conference housing.	i. Build consortium of people/organizations (public and private) who are interested/willing to lead a community visioning process to create clear guidance for a developer about what will be acceptable and move through the process.		EDC to schedule meeting of focus group for start-up
		ii. Create inventory of existing structures and potential sites and review all related land use regulations to identify opportunities.		
		iii. Research infrastructure and financing needs related to development of a large housing project.		
		iv. Research potential developers that have completed similar types of projects in the region and opportunities for potential public-private partnerships to implement in Provincetown.		
3.c	Play an active role in regional partnerships to achieve mutually beneficial goals.	i. Continued support of existing housing organizations and expansion of their efforts to other properties in town.		EDC to schedule meeting of focus group for start-up
		ii. Research potential redevelopment of the Truro Highlands property in coordination with the Town of Truro and National Park Service. Follow a redevelopment roadmap example that includes establishment of a regional governing body, conducting thorough market analysis, testing potential redevelopment scenarios, and pursuing development through an RFQ process.		
		iii. Support regional Community Development Block Grant applications.		

Measures of Success: Stable median house prices; Total number of accessible units

**Goal 4: Address Provincetown's critical issues through inclusive consensus building and new financing models.**

**Rationale: Pursuing economic and community development in an environmentally and economically sustainable way will require Provincetown to address issues related to visions for the waterfront that provide clear and comprehensive directive to any potential developer about what is wanted through a waterfront master plan and overall improved community discussions.**

	Strategy	Action	Point & Team	Action
4.a	Designate a waterfront district with clear development vision.	i. Create a waterfront development master plan that builds on the Town’s Comprehensive Plan, Harbor Plan, Municipal Vulnerability Preparedness program, and provides detail on district needs, strategies and actions regarding projects to be completed and financing mechanisms to make implementation possible. Establish necessary oversight entity to pursue implementation in line with environment sustainability and coastal resiliency goals.		
		ii. Integrate use of District Increment Financing (DIF)/Tax Increment Financing (TIF) and Opportunity Zone, Seaport Bond Fund, State Tax Credits as part of financing strategy.		
		iii. Activate the harbor through lighting, signage allowances, benches, trash cans, restaurant/store access points, boardwalk, and increased infrastructure to encourage public access, feature waterfront businesses, and highlight resource areas including the commercial fishing industry.		
4.b	Increase capacity, community consensus, and inclusive conversations around economic development issues.	i. Charge the Economic Development Committee with bi-annual review of this plan, driving implementation, and reporting success to the select board.		
		ii. Review training and ongoing support for volunteers, board members, and select board members related to economic development issues.		
		iii.. Conduct full review of Town capacity and identify areas where increased resources, including contracting with subject matter experts, are required to implement the economic development strategy and other priority projects.		
		iv. Continue to hold community forum events to discuss major issues and build community consensus. Implement recommendations of the Massachusetts Office of Public Collaboration report.		
		v. Further pursue discussions between year-round and second home owners to improve dialogue and understanding. Continue to analyze the most effective and efficient means of communication and engagement.		
Measures of Success: Number of participants in meetings; Property value of waterfront district; Town parking revenue				

**Goal 5: Align infrastructure investments to community goals.**

**Rationale: Pursuing economic and community development in an environmentally and economically sustainable way will require Provincetown to address issues related to visions for the waterfront that provide clear and comprehensive directive to any potential developer about what is wanted through a waterfront master plan and overall improved community discussions.**

Lead and Partners: Town of Provincetown, Economic Development Committee, Pier Corps, Harbor Committee, Select Board

	Strategy	Action	Point & Team	Action
5.a	Expand public transportation options to meet the regional workforce and visitor needs.	i. Maintain and enhance interconnectedness of the Town's various transportation infrastructure/services including ferry, air service, and bike trails and increase communication, marketing, and promotion of these assets.		
		ii. Review regional transportation service and identify needs and opportunities to expand service to support inter-regional workforce potential. Create a regional task force charged with researching these issues and working together to develop financially viable solutions.		
		iii. Implement findings of the parking study including establishing a new parking system that offers dynamic pricing.		
5.b	Increase water and sewer capacity.	i. Conduct feasibility study to increase sewer access to areas immediately outside of the downtown district.		

Measures of Success: Number of public transportation users; Completed feasibility study