

Orleans Strengths, Weaknesses, Opportunities and Threats (SWOT) Workshop Summary DRAFT

Introduction

The Town of Orleans is a commercial hub for the towns of the Lower and Outer Cape. In addition to the recent impacts of the COVID-19 pandemic, the Town expects to see a change to its economy due to investments in wastewater infrastructure.

The Town requested facilitation support from the Cape Cod Commission for a SWOT (strengths, weaknesses, opportunities, and threats) community workshop. The Town is anticipating future economic development planning and for responding to the rapid pace of economic change. On April 27, 2021, this community workshop was held on Zoom during an Orleans Planning Board meeting with over 30 participants, who were divided into four breakout groups for facilitated discussions.

About the SWOT Exercise

The goal of the Orleans SWOT exercise was to solicit input from key economic stakeholders to better prepare the town for an in-depth strategic planning process to support economic recovery from the COVID-19 pandemic and long-term economic vitality. Participants had the opportunity to identify what makes Orleans an attractive place to live, work, and locate a business and external opportunities for the town. The workshop also allowed participants to identify aspects of the community or external threats that may impede progress towards the Town's economic development goals.

Following a brief presentation on the project, including a review of regional and local economic development goals, workshop participants split into four breakout groups for the SWOT exercise. Each group participated in a facilitated discussion, providing feedback on their perceptions and opinions of the Town's strengths, weaknesses, opportunities, and threats. Strengths and weaknesses were specified as internal factors, or things the community may have the ability to influence that impact Orleans' economic development activity. Opportunities and threats refer to external factors, or trends happening outside of Orleans that could strengthen the community, encompassing current and potential future opportunities. The following summarizes participant feedback from the workshop sessions. More detailed information on participant feedback and notes from the discussion groups can be found later in the document.

Summary of Strengths, Weaknesses, Opportunities, and Threats

STRENGTHS

Participants identified Orleans' small businesses, natural environment, outdoor recreation and open space, infrastructure and utilities, municipal staff and services, and engaged community as common strengths. All four breakout groups identified the business community as a local strength, and participants noted that the number of proprietor-owned businesses and the relative lack of franchises contributes to a unique sense of place in Orleans. All groups also discussed the value of Orleans' open space and related outdoor recreation amenities, such as the Cape Cod Rail Trail, Conservation Trust trails, skate parks, tennis courts, and ball fields. Three of the four groups also emphasized the natural beauty of Orleans and the many highly valued natural resources in the town that residents and tourists enjoy. Many breakout groups highlighted the competency and services of local government as a key strength and recognized the Town for its investment in local infrastructure and utilities such as the sewer system and drinking water. The Town's engaged and active community was noted as a local strength, with groups mentioning that many residents are active on multiple boards and committees, and that residents take pride in their community and actively give back.

WEAKNESSES

Stakeholders named the seasonality and lack of diversity of Orleans' businesses, the scarcity of affordable housing, transportation and mobility issues, and local government communication and collaboration as Town weaknesses. The challenges of Orleans' seasonal economy and the relatively homogenous mix of industries present in town was a common weakness. Many groups discussed the overall lack of late-night activities in commercial areas of Orleans, as well as the absence of larger businesses, such as resorts, which could help increase local tax revenue. All breakout groups also emphasized that the Town needs more affordable housing, pointing out the variety of ways in which the expensive and limited housing market limits economic growth opportunities for Orleans. Multiple groups discussed that Orleans overall, and the downtown in particular, is not very walkable, though one group actually noted the downtown's walkability as a strength. Some groups remarked the Town does not actively communicate about its strengths as much as it could, and that the decisions made by local governing bodies are not always explained and communicated clearly.

OPPORTUNITIES

Amongst the four discussion groups, commonly cited opportunities for Orleans included the rise in remote working and increased year-round population and the blue and green economies. Participants in all four groups also identified that the ability to work remotely as an opportunity for increasing the year-round population, which could expand the Town's tax base and support the local economy, schools, and other cultural assets. Multiple groups discussed the job opportunities that may be tied to the blue economy given Orleans' access to the ocean and other bodies of water, as well as the job opportunities that may be tied to climate action and adaptation. It was also noted that improved collaboration between state and local government could improve local employment opportunities, and increased federal funding for infrastructure and public works could help to fund broadband and other infrastructural needs.

THREATS

A limited workforce, insufficient broadband infrastructure, climate change, and the rise of online retail were commonly named threats to Orleans' economy. Multiple breakout groups cited the limited supply of a local workforce as a constraining factor for businesses, some noting that housing affordability has made it difficult for local workers to live in the area. The limited capacity of broadband infrastructure across Orleans came up in many groups, with participants highlighting that an improved internet connection could help the town to support more remote workers/year-round residents and other aspects of an internet-dependent economy. Many participants underscored the economic importance of Orleans' beaches and other natural resources and recognized that climate change threatens these assets. Finally, the continued rise of online retail and the related negative effects on local businesses came up in three out of four discussion groups, but it was also cited as a potential opportunity if local businesses are provided the necessary support to adapt and grow.

Detailed Overview of Workshop Feedback

INTERNAL FACTORS

Those things the community may have the ability to influence that impact Orleans' economic development activity.

Strengths

Strengths – Aspects of Orleans – people, places, or things – that make Orleans a good place to live and have a business. These are internal strengths inherent to the Town.

Small Businesses – Participants noted that the number of proprietor-owned businesses and the relative lack of franchises contributes to a unique sense of place in Orleans. Some attendees mentioned that the high quality of shops, restaurants, bars and breweries, and other businesses makes Orleans a desirable place for people seeking the convenience of a denser area that is less rural or suburban than other communities on the Cape. The year-round farmer's market, and the "right-to-grow" policy that supports it, were also highlighted. Multiple stakeholders mentioned that small businesses are well-networked in Orleans and support each other, citing Friends' Marketplace, which sells gift cards to local restaurants, as an example. Nonprofits, businesses, and other organizations are willing to collaborate and provide services that they could not provide alone.

Business Development - While some attendees noted that Orleans can be perceived as unfriendly to business, others mentioned the improved working relationship between the Town and the Chamber of Commerce as a strength. Stakeholders also noted the commitment of some Town officials to helping interested businesses find property locally and the zoning code that favors local businesses.

Building Stock – Participants said the unique mix of historic and contemporary building stock in Orleans and the availability of sites that are ready for development are strengths that could help business development. Many of these buildings, including single family homes, could be adapted for reuse, which would also help to preserve the Town's character.

Natural Environment – Many participants emphasized the natural beauty of Orleans and the many highly valued natural resources in the town that residents and tourists enjoy. Some attendees highlighted the close proximity to both the ocean and the bay as a unique asset of Orleans, as well as the publicly accessible freshwater ponds. The Town also has three public gardens and an agricultural center.

Outdoor Recreation and Open Space –The proximity of the Cape Cod Rail Trail is a strength of Orleans that participants suggested could be leveraged more, along with local hiking trails. The local bodies of water also afford residents and visitors easy access to water-based activities such as

boating, fishing, swimming, and more. There are also local skate parks, an ice-skating rink, tennis courts, and ball fields. One attendee suggested that Orleans might be able to leverage some open space to develop additional outdoor venues that could spur associated economic activity.

Location – Most breakout groups cited Orleans’ role as a commercial hub for the Lower and Outer Cape as a strength. The town’s location at the convergence of regional roadways supports its position as a hub, since people must pass through Orleans to get to the Outer Cape communities.

Historic Character – Orleans has a rich history, and many historic places and architectural assets of interest that participants suggested could be better leveraged to the town’s benefit. The historic windmill was cited as a specific draw for visitors.

Arts, Culture, and Entertainment – Participants brought up Orleans’ cultural assets as strengths, citing its art galleries, summer theaters, and baseball league. With the recent relaxing of state COVID-19 regulations, stakeholders are looking forward to these assets becoming more active again. Orleans also has an officially designated cultural district.

Tax Rate – Some attendees mentioned that Orleans’ relatively low property tax rate – even for commercial properties – make it a good place to live and have a business. On the other hand, others expressed that the tax policies for full- and part-time residents should be amended to mirror the policies in other Cape towns.

Infrastructure and Utilities – Orleans was recognized for its investment in local infrastructure in all four breakout groups. Participants mentioned the recent improvements to sidewalks and intersections, as well as the ongoing downtown sewer and treatment plant project. The Town’s water supply was also highlighted as an asset. One group noted that Orleans being a frontrunner in sewer development on the Cape could serve as a catalyst for economic development, and that the Town should plan for how to leverage the upgraded sewer system in a timely manner.

Year-Round and Seasonal Populations - There is an active year-round population and economy in Orleans. Though the population is relatively small, there is a sense that there are wealthy year-round residents in Orleans and the town should focus on capturing the residents’ disposable income locally instead of losing it to other regional markets. One participant noted that the older population present in Orleans has the potential to support younger entrepreneurs. There was also some sentiment that having a relatively large seasonal population is another benefit, since these residents pay taxes but do not require as many town services as year-round residents.

Housing – Some attendees expressed that the stable local housing market has benefitted residents. Others added that local support and creative funding ideas for affordable housing have been increasing, and there are some local groups that are doing great work to increase the development of affordable and diverse housing in the town.

Education – Most breakout groups noted Orleans’ school system as a local strength that attracts families and young people. Cape Cod Regional Technical High School, with its brand new building in neighboring Harwich, offers students a range of options, and the Nauset Regional High School project will be an asset. Some also expressed that the Orleans population is highly educated.

Municipal Staff and Services – Most of the breakout groups highlighted the competency and services of local government as a key strength, stating that the Town is well run across multiple departments. One participant emphasized the flexibility and speed with which the Town adapted to COVID-19, allowing businesses to get permits to operate in parking lots and other outdoor spaces. They noted that, in general, the Town has been streamlining and updating the business permitting process. Another attendee noted that the Town has good regulations and processes that keep Orleans moving forward and well-managed. Given the older population, the Council on Aging was mentioned as a particularly important and helpful agency, and the Senior Center was described as particularly supportive of residents throughout the pandemic.

Engaged Community – All breakout groups recognized the Town’s engaged and active community as a local strength, mentioning that many residents are active on multiple boards and committees. Participants generally expressed that residents take pride in their community and actively give back. One stakeholder noted that there is a great balance among constituents, with full-time and seasonal residents, tourists, the business community, and others all engaging in local dialogue. Relatedly, the Orleans Community Facebook page is very active and informative about local businesses and other happenings.

Supermarkets – The availability of three supermarkets within town borders was mentioned as a strength.

Healthcare and Public Services – Some attendees agreed that the local healthcare system is a strength, mentioning that Orleans has many existing medical facilities and offices and will have more once the new Cape Cod Healthcare facility opens. Orleans also has award-winning police and fire departments, great emergency services, and award-winning drinking water. There is a sense that Orleans is a safe community.

Villages – The multiple villages of Orleans, each with its own distinct character, were brought up as strengths.

Bond Rating – The fact that Orleans has a AAA bond rating was stated as a strength.

Weaknesses

Weaknesses – Aspects of Orleans that detract from living and doing business in Orleans. These are internal limitations inherent to the Town.

Local Business Support – Some attendees expressed that the town could do more to support local businesses. For example, one participant noted that Chatham and Provincetown earmark money to support their local Chambers of Commerce and related marketing of the town and that Orleans could consider doing more in this area. Others also indicated over-regulation and lack of leasing support as weaknesses that discourage local business development. Furthermore, some thought that it may not be the lack of support itself, but rather the common *perception* that Orleans is not business friendly that may be the weakness. One stakeholder suggested providing support through utilities and sewer subsidies could be helpful. Another participant suggested that the Town could work with the Commission to streamline regulations and approval processes for businesses. The idea of hiring an ombudsman to help businesses start in Orleans and communicate with Town administration was also brought up.

Business Diversity and Seasonality – Multiple participants brought up that there are relatively few industries represented in Orleans and a heavy focus on tourism-driven businesses. The seasonality of many businesses was mentioned as a weakness, with an attendee noting that it contributes to business owner turnover. Furthermore, residents noted the lack of larger businesses, such as resorts, that could drive local tax revenue. Some attendees questioned how the Town might determine what types of industries to try to attract and identify strategies to increase local jobs with livable wages. One participant suggested holding a strategic planning retreat to discuss these issues in more depth. Other suggestions included hiring a dedicated staff person or forming a committee focused on business attraction and development; another included making available data and maps that might help businesses decide to locate in Orleans.

Lack of Nightlife – Many breakout groups discussed the overall lack of late-night activities in commercial areas of Orleans, which limits economic growth for the town overall.

Cultural Infrastructure – Orleans does not currently have event venues and community centers that draw crowds for concerts, seminars, movies, etc. One attendee brought up Provincetown as a positive example of a town that has created spaces to draw people for cultural events and built an economy that has longer operating hours. Participants also noted the loss of some of the Town's past cultural draws, the lack of a community center where different segments of the population could mix, and the small and outdated library building. This weakness also related closely to the lack of nightlife.

Affordable Housing – All breakout groups emphasized that the Town needs more development and construction of affordable housing, pointing out the variety of ways in which the expensive and

limited housing market limits economic growth opportunities for Orleans. For example, due to the high expense of housing, many residents are cost-burdened, which lessens their ability to support Orleans' local businesses. The high price of homeownership in Orleans has caused an increase in second homeowners and created a barrier for year-round families and families with children to live locally.

Aging and Homogenous Population – Different groups cited the aging population of Orleans as both a strength and a weakness of the town. One stakeholder noted that approximately one-third of Orleans residents are over 75 years old, and some participants suggested that this may constrain the types of services and businesses the Town considers attracting. Most groups emphasized the need to draw in families and provide support and opportunities for younger residents. Furthermore, since the population has so few school-aged children, there is some concern that Orleans' schools could be at risk (nearby, Chatham is thinking of closing their elementary school). Additionally, some worried that the lack of racial and ethnic diversity in the local population may discourage some families from wanting to move to and/or raise children in Orleans.

Family Infrastructure – Orleans can be a difficult place for families to live. Some residents noted that, in addition to the high cost of living, Orleans' housing stock offers many 1-bedroom units that are aimed at older couples without children. Additionally, there are limited childcare services, and limited safe opportunities for child recreation and mobility. One participant recommended looking into bringing universal pre-k programs to Orleans, especially since all the Outer Cape communities already have pre-k programs.

Traffic and Parking – Downtown Orleans suffers from poor traffic flow and limited parking, which affects the accessibility of the area. The swell of seasonal residents also puts a strain on infrastructure. Additionally, one stakeholder noted the traffic and speed of traffic on the bike paths as challenges.

Walkability – Multiple groups stated that Orleans overall, and the downtown in particular, is not very walkable. Some said that Orleans' shopping areas lack cohesion and that the restaurants are too spread out across town. The necessity of owning a car to navigate Orleans and surrounding areas was cited as a limiting factor for Orleans residents. On the other hand, though, one attendee categorized the walkability of Orleans' downtown as a strength.

Land Use – Participants noted that the lack of a strategic plan for land use has been detrimental to the Town and that by and large the private sector has been dictating Orleans' development pattern. Participants suggested the Town could do more to plan for land use, make strategic land purchases, and intervene in the market.

Local Government Communications and Collaboration – Some participants feel that the decisions made by local governing bodies are not always explained and communicated clearly.

Additionally, it was stated that the Town does not actively communicate about its strengths as much as it could. While community engagement was cited as a strength, some participants noted that local groups and committees can be siloed and should work to collaborate more, and that more effort should be made to reach parts of the local population who are not as active in local government. One participant suggested updating the Town website could help address these communications issues.

Funding for Local Government - Some participants expressed that some local government departments are not as well-funded as they could be, including the recreation department, which one participant suggested should not be housed in the department of public works.

Local News Media - Attendees said that the lack of a local newspaper can make it difficult for people to participate in local decision making and to find out about new business openings and other events.

Vacant and Poorly Maintained Buildings - Some buildings, particularly in East Orleans, are either vacant or poorly maintained. Additionally, some local signage around town is in poor condition. Orleans' local zoning lacks a blight bylaw, which makes it difficult for the Town to address blight.

Healthcare - While some noted availability of health services as a strength, multiple other stakeholders expressed that there is an insufficient supply of available physicians and medical offices nearby.

Council on Aging (COA) - One attendee noted that the COA has outgrown its existing space and its building is threatened by sea level rise, suggesting that it could be located in a more central, active location where young and old residents can mix.

Wealth Gap - Some participants flagged that there is more poverty in Orleans than some may realize and that the local wealth gap is growing. In addition, there seems to be an outside perception that Orleans residents and business owners are all affluent, which can affect access to financial support for some residents and business owners in need.

Water - The reliance on a sole source aquifer that is shared with other municipalities, and one stakeholder expressed concern about overall water quality issues.

EXTERNAL FACTORS

Those things that impact Orleans' economic development activity but that are driven by external forces, so that we have less influence over them.

Opportunities

Opportunities – Trends happening outside of Orleans that could strengthen the community. These are external factors, encompassing current and potential future opportunities.

Online Retail – Though some participants noted that the rise in online retail could be a threat to Orleans' brick-and-mortar stores, it was also noted as an opportunity if local businesses strengthen their online presence and e-commerce capabilities.

Low Federal Interest Rates – The current low interest rates could create opportunities for investment locally.

Blue Economy – The increased interest in the blue economy nationally could benefit Orleans due to the Town's natural assets like Nauset Beach. Participants noted that the Town should do more to capitalize on its blue economy assets. For example, opportunities cited included seaweed growth, marine research activities, and other ocean-related educational programs.

Green Economy – Adapting to climate change could present opportunities for new jobs with livable wages.

Rise in Remote Working and Increased Population – Participants identified that the ability to work remotely has caused a higher demand for short- and long-term rentals, as well as for local homeownership. Participants suggested the resulting increase in the year-round population could expand the Town's tax base and support the local economy, schools, and other cultural assets.

Federal and State Funding – Participants noted improved collaboration between state and local government could improve local employment opportunities. Additionally, increased federal funding for infrastructure and public works could help to fund broadband and other infrastructural needs. Participating in state and federal energy goals – as well as goals for agriculture, culture, and economic development – could provide additional opportunities.

Increased Construction Activity – Participants identified that the recent stay-at-home orders have resulted in an increase in local homeowners deciding to renovate or otherwise improve their properties, which has had a positive impact on the local construction sector. It was also noted that, in general, there is a strong market for jobs in the trade professions in Orleans.

Threats

Threats – Things from outside of Orleans that put the community at risk. These are external factors, encompassing immediate and potential future threats.

Seasonal Economy and Low Wage Jobs – Participants noted that like many Cape towns, much of Orleans' economy caters to summer tourists and seasonal residents, which makes it more difficult for businesses to thrive year-round. In addition, some mentioned the overall lack of economic diversity as a threat. Many local jobs are in the service sector, which typically does not pay high enough wages to support the average cost of living in Orleans.

Limited and Shrinking Local Workforce – Many participants cited the limited supply of a local workforce as a constraining factor for businesses. Housing affordability has made it difficult for local workers to live in the area. Some participants also cited COVID-19 and the ongoing unemployment benefits as a possible reason why some service workers may not be available for hire. The limited allocation of visas for international workers is also contributing to the issue.

Lack of Affordable Housing – Participants mentioned that the Town lacks enough affordable housing and has witnessed some out migration of families who can no longer afford to live in the community. The regional high cost of construction and lack of labor further exacerbate this issue and limit the Town's ability to build more housing and other assets. The incentives for landlords to post their properties for short-term rental with businesses such as Airbnb rather than rent to year-round residents also came up as a threat.

Climate Change – It was brought up that Orleans' beaches and other natural resources are major economic drivers, and climate change threatens their existence. Participants noted ocean temperatures, red tide, habitat loss, and loss of animal and bird life as related threats and urged the Town to provide more resources and attention to these issues and adaptation strategies moving forward.

Broadband Infrastructure – Like many Cape towns, participants noted that Orleans currently lacks the infrastructure for high-speed internet, and many attendees brought up the slow and limited Wi-Fi as a threat to the Town's growth. If Orleans could improve the local broadband infrastructure, this threat could become an opportunity to support more remote workers/year-round residents and other aspects of an internet-dependent economy. In addition, the Town does not currently know how much broadband capacity is needed to better support remote workers and local businesses.

Online Retail – Some participants are worried that the rise in online retail could hurt local businesses including legacy businesses that have been in families for generations and are cornerstones of the community. The rise in online retail was also cited as a potential opportunity if local businesses are provided the necessary support to adapt and grow.

Seasonal Overpopulation and Traffic – Participants noted the increased number of residents in warmer months causes more traffic and congestion, limiting mobility and accessibility to and within Orleans. Furthermore, the swell of summer residents can put a strain on the Town’s resources – contributing to the degradation of natural resources.

Transportation and Roads – Participants brought up that regional transportation infrastructure dictates Orleans’ ability to receive supplies for construction and businesses quickly enough to remain competitive.

Regional Competition – It was mentioned that other nearby towns’ ability to grow their commercial bases can limit Orleans’ ability to grow economically.

COVID-19 – Participants identified that the pandemic and the related stay-at-home orders have had a negative impact on many local businesses.

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Breakout Group Notes

Following are the notes from during the workshop capturing what participants said in each of the four breakout groups.

Breakout Group 1

INTERNAL FACTORS

Strengths

- Orleans is a unique place, which is reflected in the number of proprietor-owned businesses, there are not a lot of franchises or a sense of sameness to other places, there is a certain sense of place
- Natural environment
- The location, Orleans is at the convergence of regional roadways and people have to pass through to get to the communities of the Outer Cape
- The commercial center and location of Orleans are an ideal hub of the Lower Cape – the area in general, has good shops, didn't want to live in the suburbs or country
- Rich historic element available to people – could be leveraged more
- Institutions (Cape League, two summer theaters); strong cultural element, lots of art galleries
- Low tax rate even for commercial properties
- Cape Cod Rail Trail - could be leveraged more
- Are there any specific town supports or resources for businesses?
 - Weakness: the town is not a real supporter for local businesses
- In the last few years the town has invested near \$6M in sidewalks and intersection improvements, and \$60M in the downtown sewer
- Town created water supply in 1962, public utilities have been advanced by the town
- There is an active year-round population and economy
 - Market is small because there is water all around, but there is a lot of wealth and disposable income around; need to capture that and not lose it to other markets (towns)
- Large positive that housing and pricing have always been stable
- There has been a good change in attitude towards creating more affordable housing as an education matter, could be more/better in a development/construction matter
- Provincetown and Chatham earmark money to their Chambers of Commerce and for the marketing of their town, Orleans could do more in that way

- Makeup of the tax base is an economic advantage: 50%+ is seasonal homeowners that pay taxes but don't require all of the local services, town government is partly subsidized by people that don't need services, and there is still a low average residential tax rate
- There is a strong market for trades jobs

Weaknesses

- Is seasonality of marketplace internal or external? Maybe both
- Cost of housing, people are cost burdened
 - If people are cost burdened their disposable income is focused on housing and not available to support other local businesses, being shortchanged when you consider 30% for housing
 - The price of homes has skyrocketed – the median price is approx. \$800k, we've created a town that is transitioning to second homes, we're losing year-round families and families with children, COVID is exacerbating this problem – it affects housing, jobs, etc.
- We have a population where 1/3 of current residents are 75+, this could dictate what services are available in town or should be brought into town
- Downtown suffers from poor traffic flow and too little parking which affects what happens in that area
- There is a lack of cohesiveness in shopping areas, a lack of nighttime activity (past efforts to address didn't take)
- Because of the layout of downtown we do not have a walkable downtown, Main and 6A may be but that is a small percentage of opportunity to purchase
 - Rail through town had train stop, automobile brought other stores and planning layout that contributed to shopping centers (comments on the history of development patterns/style)
- Perception of Orleans from a business standpoint is it is not as supportive of business because of over regulation, lack of leasing support, perception Orleans is not open to business or business-friendly – but support could be provided through utilities, sewer which could create opportunity
- Restaurants are spread out downtown, if they were within a ¼ mile of each other it would be a district
- Orleans has been passive, has not made municipal purchases to control how the town has developed (ex. parking lots, parcels, etc.), can't just let private sector control how the town develops, the town needs to be willing to intervene and control the market of downtown somewhat

- CCC could help town streamline permitting and regulations, could be beneficial to facilitate commercial businesses to open

EXTERNAL FACTORS

Opportunities

- Create unique and specialized online retail (ex. Bird Watchers General Store)
- Low interest rates, chance to invest right now
- Doing business from home – need to support bringing people out of their homes to start a business or do business here
- Blue economy, need to capitalize
- Opportunity to work remotely is a game changer (family has been working remotely for 14 months with no plans to return to the office); have seen families with children for the first time in years, newcomers to the Cape, Orleans has great schools and natural resources that leads to great opportunity and more year-round disposal income – could make a significant difference
- The Cape has a history of family businesses passed from generations which could be ending because of changes in the retail market, we may not see the same type of retail economy we have today (ex. boat yards here did not exist years ago)
- Infrastructure: to accomplish this bringing in fiber/broadband would serve as a great framework for marketing the internet economy, hospitality, food, small and family run businesses
- Having an event venue/community center for concerts, seminars, movies, with planned schedule of events as a coordinated effort could be a draw
 - Provincetown has smart economic promotion, Orleans has no place that does that (movie theater) downtown, nothing to stick around for after dinner
 - Need input from downtown businesses, the town could do things to support that kind of change

Threats

- The internet has changed the possibilities for retail, businesses need to be specialized and unique, they cannot sell the same stuff as Amazon
- Impact of internet on retail
- Seasonal congestion – year-round population shift



- Conservation/natural assets were overwhelmed this past year, this gives us a chance to see what may be in 20 years as we build out, it could make Orleans less appealing if we do not control it better
- Global warming: beaches (Nauset, Skaket) are economic drivers, what happens when they are not there, or there's no parking?
- There is a regional high cost of construction, lack of labor, regional competition where other towns are growing their commercial bases, regional road/transportation network (things coming over 2 bridges) dictates how supplies are received
- There are unknown capacity needs of utilities (broadband) to support working from home
- Lack of racial, ethnic diversity discourages some families from wanting to raise children here and sets up an image for the town of being older and whiter that may not be appealing to everyone, also lack of economic diversity
- "We're the victim of our own success", there is migration off Cape of people who work here but can't afford to live here, there is more affordable housing on the other side of the bridges

Other Comments:

- Population age in Chatham, they are thinking of closing the elementary school, we've seen similar closures in other places, need to watch this carefully
- With current trends, will we be left with legacy families and remote employment parents raising kids here?
- Loss of young families: we don't have the jobs that pay enough to let people live here, we have a "service economy" that doesn't pay well, we're also dependent on foreign labor which can be limited or hard to find making businesses suffer
- The high cost of construction without public dollars makes expansion and building extremely difficult
- The town needs to do something to support the "wish list" for economic development
- Is there a resort center for strategic thinking (large home or camp)?

Breakout Group 2

INTERNAL FACTORS

Strengths

- Balance between major constituent groups – full time residents, tourists, non-resident taxpayers, business community. Chamber has worked with town on improving working relationship.
 - Orleans is a business hub of the Cape
- OPPORTUNITY: Flexibility and speed with which town helped businesses adapt to COVID and set up in parking lots/outside
- Over time we have improved our permitting processes – online permitting, electronic flow from department to department. Not perfect yet, but improving.
- Good school system – Nauset school system draws people and attracts younger families
- Good regulations and processes that keep the town moving, many committees that take care of the way the town looks – but sometimes it is unclear why opportunities don't move forward (Frank Webb, CVS)
- Orleans affordable housing committee and affordable housing trust board has done great work to help make things happen and trigger events for both 107 Main St effort, and Penrose – these groups are helping the town to think through how we might solve the housing issues
- Orleans senior population – the most senior town on the Cape
- Most educated town on the Cape
- Young families becoming active in town committees
- Town official providing businesses with personal attention to property search – e.g., Toyota – (Orleans business hub of Outer Cape)
- Some local businesses are helping others – Friends' Market selling gift cards for other local restaurants, for example
- Orleans Community Facebook Page is very active - this is how people are finding out about local businesses, etc.
- Orleans Chamber has an updated website with information on businesses; LoveLiveLocal regional group also promotes local businesses and has monthly newsletter
- Local baseball league starting their season this year, other events following state regulations relaxing

Weaknesses

- Still can be a rocky path for businesses to get started here
- Broadband is limited, might not support all remote workers
- Decision making process can be opaque
- Need more (affordable) housing in the area
- Lack of vibrant local newspaper – most news on Orleans comes out of the Cape Cod Chronicle; lack of local communication and dialogue
- Local groups can be siloed
- Lack of clarity around how much Orleans wants to develop more opportunity for young families locally, and how
 - A lot of housing is for 1-bedroom units
 - Lack of childcare, safe recreational opportunities, and mobility for kids
- No large-scale resorts that drive local tax revenue; smaller B&Bs, etc.
 - Lack of clarity around what industry Orleans could/should grow to increase livable wage jobs (green economy considerations, questions around who is responsible)
- Increase collaboration sub regionally on business attraction
- “Committee community”
 - Concern about communicating with voters

EXTERNAL FACTORS

Opportunities

- Ensure the balance between constituent groups continues, make sure communications pathways are open
 - Continue to make it easier for businesses to start here
 - Consider having an ombudsman to help businesses start here
- Have universal Pre-K, other towns are doing it; will revisit this topic in the summer
- If local committees met more frequently with planning board, more open dialogue on direction of committees (e.g., CVS)
- Have more cross-sector communications and collaborations
- Create more livable wage jobs
- Improved collaborations between local and state govt to improve employment opportunities



- How to attract the 'right' industries here? Creating boards/committees/dedicated staff that can respond to opportunities to attract industries/businesses quickly
- Idea to hire a consultant with experience in attracting industries to help restart – planning board working on this
- Create transparency with data and maps that help businesses decide to locate here
- Sewer development is in progress – opportunity to plan for the future when we have more sewer capacity. Orleans is a frontrunner on the Cape with sewer development – can be a catalyst.
- Financial opportunities coming out of the American Rescue Plan – specifically for public works, could potentially support sewer and broadband infrastructure
- Are there supports that can advise our local businesses on how to be more competitive with online shopping and other resiliency issues? (CDP and SCORE provides relevant services; Revby creating toolkits for risk mgmt./continuity, etc.; Chamber of Commerce offering resources)
- Opportunities for older population to support younger entrepreneurs
- Does adapting to climate change provide workforce/construction opportunities?
- Can new residents that have moved here to work remotely support various local initiatives?
- Higher demand for short term rentals; people staying longer on average in rental properties – can help local economy
- Many local homeowners improving their properties – local construction companies are busy

Threats

- COVID-19
- Lack of local workforce for businesses
- Some local businesses offer lower wages than unemployment (service industry typically offers low wages)
- Lack of broadband infrastructure touches all businesses in our community, as well as remote workers
- Online shopping affects local small business revenue
- Climate change/sea level rise/erosion
- Higher demand for short term rentals; people staying longer on average in rental properties - reduces affordability and availability for local year round renters and workforce
- Lack of publicity / media for new businesses
- Traffic and congestion
- Town readiness to open up following state regulations relaxing?

Breakout Group 3

INTERNAL FACTORS

Strengths

- Ocean, bay access all from the center of town – within a mile of both
- Schools
- Sewers in town center
- Highly educated and involved/participatory population
- Three supermarkets
- Has historically been the commercial center for lower cape
- Good road access to many places
- Two major highways – Rte 6 and Rte 28
- Year-round activity
- Officially designated Cultural District
- Town center – recent streetscape and roadway improvements
- Access to water activities – boating opportunities of any sort
- Shellfishing and fishing activities/opportunities and access
- Freshwater ponds public access
- Cape Cod Rail Trail and amenities
- Historical society, places of interest, historic and cultural resources
- Brewery; a good amount of restaurants spread across town
- Beautiful siting and town setting on the cove
- Future medical facility - Cape Cod Health Care coming, as well as existing medical facilities/offices such as Spaulding Rehab and other medical offices
- Excellent/award-winning police and fire departments; great emergency services
- Award-winning drinking water
- Skatepark; ice skating rink; tennis courts; ballfields
- Baseball team
- District courthouse
- Competent town government
- Agricultural center – three public gardens, year-round farmers market; right-to-grow
- Zoning favors local businesses
- Development potential – sites ready for development; have a unique building stock with both contemporary and historical buildings of significance

- COA is important
- Highlight local educational opportunities – great elementary school

Weaknesses

- Expensive housing
- High cost of living
- Poorly funded recreational department
- Lacks a universal pre-K support (financial); the only community between Orleans & Provincetown that does not provide pre-K program funding
- Shortage of affordable housing
- Communication facilities not up to date
- Poor walkability – Not easy to walk downtown, parking lots in front of the buildings
- Access to downtown parking is not clear; lots are hard for visitors to find
- Poor Wifi access
- Few things happening/open at night; no evening downtown magnet. Downtown shuts down early.
- Loss of cultural draws – visual arts, theatre
- Empty and rundown buildings in East Orleans: eye-sores – also old signage in poor condition in various locations
- Zoning bylaw lacks a blight reference; Town can't address blight
- Town government structure is siloed and deters opportunities for communication btw boards and committees
- Opaque government processes – gap in ability to connect with voters
- Town website needs to be updated
- Insufficient supply of available physicians/medical offices
- COA has outgrown its existing space; building is threatened by sea level rise; could be located in a more central, active location where young & old can mix
- Lack of community center and mixing of age groups
- Library building is dated and too small
- Recreation program is housed in the DPW
- Town not good at messaging what it has to offer

EXTERNAL FACTORS

Opportunities

- Climate change and sea level rise – development opportunities, better ability to respond to changes, promote and incorporate sustainability into planning processes; encourage creative/collaborative approaches to dealing with challenges; new way to think about services and how they could offer new jobs.
- More people working remotely due to the pandemic
- Trending towards a more year-round economy
- Participating in state/federal energy goals – energy, culture, economic development, agriculture
- Local educational opportunities with influx of new residents – great elementary school; cultural assets - lots of potential; how do we develop these assets?
- Marketing – better messaging about the town and its assets and character
- Unique stores are a draw; shopping local trend helps Orleans local businesses
- Form-based design to reuse existing building (some of which may be historic) inventory; adapting use of single-family home form for other uses
- Changing demographics – more diverse population, younger families moving into town help strengthen the community and schools
- Public restrooms, parking, sewer
- Recreational and outdoor opportunities like hiking trails are draws – especially during pandemic as more people seek opportunities for outdoor activities
- The need for attainable housing is encouraging the town to embrace more affordable housing; multi-family housing; creative funding opportunities for a more diverse housing stock; work towards better funding sources
- Encourage year-round residents
- Better broadband services for remote workers
- Different tax rates for full and part-time residents like other Cape communities

Threats

- Influx of richer year round residents - less diverse community
- Retail is disappearing – threat to downtown viability
- Lack mid-income jobs
- Need a car to navigate within Orleans and get to Orleans



- Lack of diversity among those who participate in Town matters - not hearing the voices of the labor/working population
- Hard to get seasonal help – largely due to housing and pandemic
- Short-terms rentals like Air BnB
- Lack broadband access throughout town
- Significant proportion of aging/elderly population

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Breakout Group 4

INTERNAL FACTORS

Strengths

- Town of Orleans' municipal staff and resources
 - Town is well-run across departments
 - Senior center has been particularly helpful during the pandemic
- Collaborative, involved individuals and organizations
 - Multiple, active volunteer groups
 - Orleans Citizens Forum brings the community together
 - Nonprofits, businesses, organizations are willing to collaborate and provide services they couldn't alone
 - Orleans Conservation Trust's public trails, resources benefit all
 - Warm, helpful community (people come to one another's aid when there is a need)
- Quaint, friendly character
 - Orleans' "working town" character is historic, healthy, good, reflected in architecture
 - Historic windmill is destination, evidence of community action
 - Sense of safety
 - Sense of community pride
 - Uncrowded
- Water access / variety
 - Beaches, bay and ocean, cove
 - Nauset Beach (seashore, boating)
- Sense of family / wonderful kids
 - Regional middle school structure brings diversity
 - New tech school offers students a range of options
 - Nauset Regional High School project will be asset
 - Kids / young people are strong resource for community
- Beautiful
- Multiple distinct villages with different characters
- Walkable downtown area with amenities
 - Just about anything you need, you can get in Orleans
 - Convenience
- Infrastructure
 - Watershed (500 acres, protects wells for drinking supplies)

- Downtown sewer construction is an investment for the future
- Recent investments in pedestrian infrastructure / walkability
- AAA bond rating

Weaknesses

- Seasonality of tourism-driven economy makes it difficult to do business, contributes to business owner turnover
- Quiet at night (need more life)
 - Very dark at night outside downtown area
 - Need more cultural opportunities or more large arts venues
 - Need an active performance center (this would bring in people, be useful for other businesses)
- There is more poverty than many people realize
 - The wealth gap is growing
 - Some development projects contribute to this trend
 - People assume business owners are affluent (businesses located in Orleans may not be eligible for financial support due to this perception, wealth in broader community, real estate market)
- Decline in families and children
 - Need to offer more in terms of year-round and kid-friendly activities
 - Need an intergenerational community center
 - Need more ad hoc recreational activities (available basketball hoops, movie theatres, etc.)
- Speed / traffic on bike path
- This year, it will be almost impossible to find workers
 - Unemployment benefits may be higher than wages
 - Challenges for / uncertainty about J1 workers
 - Will be hard to find worker housing
- Sole source aquifer, shared with other municipalities
- Businesses are still adjusting operations to shifting demands due to internet
 - Must figure out new ways to deliver services
 - Hotels / motels facing shifting demand due to Airbnb etc.
 - Restaurant industry also affected negatively
- Healthcare and human services sectors are sparse, needed
- Affordable housing crisis
 - Seasonal worker housing is always a challenge
 - Lack of affordable housing is a major concern for businesses, young people

- Even people who want to stay / the great kids who grew up in Orleans may not be able
- How is the community preparing for next generation of residents?

EXTERNAL FACTORS

Opportunities

- New uses for the ocean, growing Blue Economy (seaweed growth, for example)
 - This could offer ways to both retain older workers and introduce new generation to new ways of interacting with the ocean
 - Orleans should try to attract research activities, like Woods Hole or universities in Florida, or partner with existing programs
 - Orleans should look at experimental things other communities are doing, keep open mind
 - Having access to bay and ocean is special
 - Orleans' greatest resources are its natural resources (this is what will bring people)
 - These activities could have a global reach in addition to regional
 - The community should engage kids from early age in ocean studies
 - These experiences / activities with natural resources must be in-person (cannot be replicated / remote)
- Pandemic has highlighted how great it is to be outdoors, and Orleans has open space
 - What other kinds of outdoor venues could Orleans provide?
 - This will continue to be a trend, even as pandemic evolves (will feel safer)
- More people are working virtually, living in Orleans, contributing a wider variety of perspectives / views
 - This may spur broader change / shifts in views
 - Could an incubator help advance this attitude adjustment?
 - How can new population / residents be engaged?
 - Are younger people also moving to Orleans?
- The community should use the pandemic as a mechanism to reassess, ask what next generation will enjoy, prepare for changes
 - Growing demand for healthcare
 - The community should provide avenues for young people to get involved with this industry

Threats

- Competition with online or bigger companies



- Affordable housing shortage
- Climate change
 - Ocean temperatures, red tide, habitat loss, loss of animal and bird life
 - The community must be prepared to adapt, look at these broader threats in microcosm of Orleans and Cape Cod
 - How do we treat the beaches? The marshes? The wetlands? Town does excellent job, but may need more resources and attention moving forward.
- Perception of demographics in Orleans
 - Funding formulas are not favorable for Orleans
 - Need political help to address
- What do we need to do to keep Orleans thriving and alive as the world changes?

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