



# WHALE

## Strategic Plan 2019-2024

*Revitalizing New Bedford through Historic Preservation*

[www.waterfrontleague.org](http://www.waterfrontleague.org)



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## Acknowledgements

The strategic plan was developed by staff and the WHALE Board of Directors. The planning process started with a Strategic Planning Board Retreat with Colleen Dawicki overseeing the process. The Strategic Plan was submitted to the City of New Bedford Office of Housing & Community Development as well as the Mayor's office for input.

WHALE's Strategic Plan is strongly guided by the results of the *WHALE Strategic Plan; Embarking on our Next Half-Century, A Strategic Plan for 2013-2018*. The Strategic Plan process included community outreach to WHALE members and friends through interviews, providing feedback on our past work and suggestions and insights for the future.

The Committee also drew on the wisdom of leaders in the community and experts in historic preservation and neighborhood revitalization, including the following individuals:

- Mary Anthony, Executive Director, 1772 Foundation
- John Bullard, WHALE's first Executive Director and former Mayor
- Michele Roberts, Vice President, Bristol County Savings Bank
- Peter Kavanaugh, Chair of the WHALE President's Council
- Tony Souza, former Executive Director of WHALE
- Anne Louro, Historic Preservation Planner, City of New Bedford
- Christina Connelly, Chief Operating Officer, Office of the Mayor of New Bedford



## Summary

WHALE is a mature nonprofit organization that has an impressive 57-year track record of accomplishment in historic restoration work that has truly changed the low to moderate income neighborhoods of New Bedford. Our programs and projects encourage residents, organizations and businesses to engage in historic restoration work that impacts the social, cultural, and economic development of New Bedford.

### ***Vision***

*WHALE envisions New Bedford as a vibrant seaport community where the historic and architectural heritage of its diverse people is celebrated, preserved, and continually used to enhance the city's economic and civic vitality for the benefit of all residents of the South Coast.*

### ***Mission***

*The mission of WHALE is to foster historic preservation and continued use of the city's architectural heritage to enhance community and economic vitality in New Bedford.*

*WHALE accomplishes its mission through:*

- *Bricks and mortar historic preservation projects,*
- *Advocacy, and*
- *Education*

With over 80% of its housing stock classified as historic, New Bedford is unique in that it has always valued historic preservation as a tool for community revitalization. WHALE's longest-serving president realized that "If you bulldoze your heritage, you become just anywhere." WHALE's goal is to make this historic preservation revitalization tool accessible and beneficial to all New Bedford residents so that neighborhoods are culturally strengthened and retain their character as desirable places to live.



*WHALE believes that Historic Preservation is a powerful tool for community and economic revitalization that:*

- stabilizes property values, and improves the character of the whole neighborhood;*
- creates affordable and workforce housing to diversify the community's housing stock;*
- strengthens the local economy and helps create jobs;*
- provides a foundation for cultural and heritage tourism, fostering civic beauty and the arts;*
- promotes adaptive reuse of existing buildings-the "greenest" form of a new building;*
- safeguards a community's heritage;*
- and protects irreplaceable places that matter to us.*

Until the certification of WHALE as a Community Development Corporation (CDC), there were no New Bedford based CDC's engaged in real estate development that address the pressures that our historic neighborhoods feel from neglect and *abandonment* of historic properties. As a five-year old CDC in New Bedford, WHALE is engaging and facilitating historic projects that truly impact the community and economic development of New Bedford's neighborhoods. This Strategic Plan summarizes WHALE's overall historic restoration and community development approach for New Bedford that will benefit our constituencies for 2019-2024.

## **History and Track Record**

WHALE promotes the economic revitalization of downtown New Bedford and its surrounding neighborhoods through the acquisition and restoration of historic properties for reuse as cultural venues, affordable housing, neighborhood commercial space and other uses that stimulate the local economy.

WHALE was founded in 1962 during a time in our nation's history when city centers were in decline and their buildings decaying. The Federal Government's solution was Urban Renewal, a program of demolition and clearance of blighted areas to make way for new construction they hoped would follow. The founders of WHALE saw in the city's deteriorated waterfront area quality structures built during the city's whaling and textile manufacturing heyday...the bones of a thriving city and the embodiments of New Bedford's rich and diverse heritage. They worked to save them utilizing the first pool of donations they pulled together, in essence, WHALE's first Revolving Loan Fund. They acquired buildings, renovated and repurposed them. They rescued houses slated for demolition, moving them to fill in vacant lots in the district.

They also saved properties that now rank among the city's most popular cultural treasures: the 1834 Rotch-Jones-Duff House and the Zeiterion Theatre.



Today, the rescue and transformation of New Bedford's historic waterfront area and downtown is nationally recognized. The downtown, once in deep decay, is now home to a multitude of historic and cultural attractions, to two universities, to a diversity of retail operations and eateries, to office workers and, in recent years, to hundreds of new residents who have chosen to live downtown. Although downtown still remains a low-moderate income neighborhood, it is contributing mightily to the city's economy and vitality.

For 57 years, WHALE has made a difference in the revitalization of this Gateway City. WHALE has rescued over 65 historic properties, inspiring pride in residents and helping to transform New Bedford for the better. The projects have had a major impact on New Bedford's economy.

### **The New Bedford Community**

The Waterfront Historic Area League is a place-based organization serving the economically disadvantaged geographic area of the Gateway City of New Bedford, Massachusetts. Specifically, our service area is defined by New Bedford's municipal boundaries.

The City of New Bedford is seen by its residents as a wonderfully diverse and culturally rich community with a proud past, present and future. As the whaling capital of the world in the 19th century, the city has evolved to become the home of many major industries, which manufacture products used throughout the United States and abroad. The city prides itself on its working waterfront and historic district, as well as its expanding retail and tourist trades. New Bedford is the number one fishing port in the country in dollar value.

While it is a city of approximately 98,000 people, New Bedford maintains a close-knit community feel. Recently named one of the top ten "Green Cities" in the country, New Bedford has beautiful parks and beaches. New Bedford is also enhanced with festivals and celebrations throughout the year, and is enjoying an upswing in tourism.

WHALE's focused target area has historically been the downtown and its surrounding low to moderate income neighborhoods. According to New Bedford's 2012 U.S. Census Data, the average median income (AMI) in the service area of New Bedford is \$36,789, compared to the AMI of \$66,658 state-wide.

New Bedford is rich in history and architecture. While the buildings of the National Park are protected by strong preservation regulations and the New Bedford Historical Commission, there are 16 historic neighborhoods in New Bedford near the downtown and waterfront that have been designated National Register Historic Districts—encompassing thousands of properties. These districts are largely unprotected with many homes in need of preservation due to abandonment, neglect or demolition.

## **Community Outreach and Involvement**

WHALE engages with local residents and businesses in all of our governance, planning, programming, and community outreach, including:

- **Board and Committee Leadership:** The Waterfront Historic Area League's Board of Directors is the governing body of the organization. The Board meets as a whole every month, with committee meetings held on a monthly or as required basis. The WHALE Board includes New Bedford residents, business owners, community leaders, historic preservation experts, and representatives of other nonprofit and profit organizations serving New Bedford.
- **Real Estate Development:** All of WHALE's affordable housing, commercial, creative economy and mixed-use historic preservation development projects are initiated by, and approved by, our representative Board of Directors. We also work in close relationship with the City of New Bedford's Office of Housing and Community Development and the Mayor's office to ensure that our development initiatives support and complement the City of New Bedford's overall economic development and revitalization goals and strategies.
- **Partnerships:** WHALE is working with six non-profits as development partner on real estate projects to further each of their missions and build them headquarters



or programming space to do their important community work in neighborhoods of New Bedford. These include a workforce boat building center, an arts incubator, a Cape Verdean cultural center, a community theater, Veteran's transitional housing, a community wellness center, and a historic house museum.

## Current and Pipeline Projects

WHALE continues to see a drastic increase in funding and development activity. In the last five years, WHALE leveraged over \$16 M in project financing for the revitalization of downtown New Bedford and its surrounding neighborhoods



### The Co-Creative Center, 137 Union Street

This 10,000 SF mixed-use development houses a community art gallery, co-workspace, collaborative makerspace, nonprofit offices, and four residential units. This project, designed by local architectural practice studio2sustain, was completed in March 2018.

### Expansion of Southeastern MA Veterans Transitional Housing

Restoration of this blighted 1830s Greek Revival will add 20 units of Veterans transitional housing to New Bedford. The property was also designed to include recreation and classroom space, a laundry room, and a 24/7 staff support office. WHALE and Veterans Transition House will complete the project in winter 2020.



### Hillman Street Firehouse

This c. 1892 neighborhood firehouse was constructed during a period of tremendous economic and population growth in New Bedford. After suffering from decades of vacancy, it was scheduled for demolition in April, but WHALE stepped in to save it from the wrecking ball. The building will be restored and rehabilitated for residential use with three market-rate and six affordable units.

### Capitol Theater, North-End Resource Hub

WHALE has partnered with the Community Economic Development Center (CEDC) to restore and rehabilitate a 1920 mixed-use film theater and commercial building on Acushnet Avenue for use as a resource hub for the North End. The building will provide office space for CEDC, 6 units of mixed-income housing, community co-working space, and food- and textile-oriented business incubator space.







## Leander A. Plummer House

Leander Plummer, a New Bedford native, was one of the founders of the New Bedford Cordage Company, which provided ropes for whaling ships during New Bedford's whaling boom. When 148 Hawthorn was constructed for Plummer c.1857, it was one of only a handful of houses in the then-bucolic neighborhood to the west of the city. After years of vacancy and decay, WHALE is working on a full restoration to bring the house back to its original splendor.

## 318 Pleasant Street, First-Time Homebuyer Project

WHALE rescued this c. 1850 Greek Revival from the wrecking ball after over 40 New Bedford residents petitioned WHALE to save it. The two-family home was fully restored and sold to a qualified low-income, first-time homebuyer through the city's Neighborhoods First program.

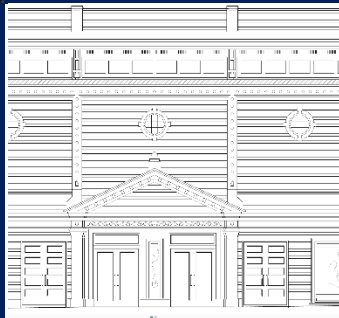


## First Baptist Church, National Treasure

WHALE and Your Theatre have partnered to restore this 1829 Quaker-designed church as the Steeple Playhouse Community Theater. WHALE secured funding to completely rebuild the deteriorated bell tower and steeple (the last surviving steeple featured on the city seal) and is now completing restoration work on the rest of the building.

## Historic Strand Theater as Cape Verdean Cultural Center and Island Park

As development partner, WHALE and Cape Verdean Association of New Bedford will restore the Strand Theater for a cultural venue at the entryway of Acushnet Ave., the city's "International Marketplace." The Island park and mural project abutting the site will transform the Ave. further.



## Strategic Goals and Objectives

The overall goal of WHALE's projects and programs is to assist in revitalizing downtown New Bedford and its abutting neighborhoods by:

- Creating much needed workforce/affordable housing
- Restoring historic buildings that are either vacant or in a state of disrepair
- Creating new arts and cultural venues to promote tourism and provide new arts enriching experiences for all New Bedford residents
- Providing pride for area residents that their neighborhoods and city have a rich historic past that should be preserved and celebrated
- Creating new jobs both in construction and permanent positions related to the reuse of the buildings

Specifically, our Strategic Plan is designed to achieve the following goals and objectives:

### ***1. Increase and strengthen the foundation for "Revitalization through Historic Preservation" in New Bedford.***

Communication and education about the importance of historic preservation to the city of New Bedford is continually important to emphasize. There is a need to build the grassroots support for historic preservation citywide, among all New Bedford residents, of all ethnic, racial, and economic backgrounds. In this way, the rich history and culture of New Bedford will be kept alive by telling the story of the city's past through its remarkable historic buildings and the stories that these buildings tell in the pride of their community.

- a. Create a Community Committee comprised of Board Members and Staff interested in developing achievable education and outreach programming and examining ways to make WHALE and historic restoration more accessible and diversified
- b. Invite Board Members on Staff Neighborhood Walks for exposure to projects and residents' concerns
- c. Establish more inclusive and cost-friendly WHALE events
- d. Develop an accessible Preservation Work-shop series for historic homeowner restoration

- e. Explore the feasibility of a Restoration Workforce Training program in collaboration with other non-profits to teach New Bedford youth trade skills in historic preservation

***2. Undertake or assist bricks-and-mortar historic preservation projects and build WHALE's revolving fund to accelerate the pace of preservation in New Bedford's historic neighborhoods***

- a. Finish current projects: First Baptist Church, Capital Theater, Strand Theater, 1060 Pleasant Street, and 148 Hawthorn
- b. Continue the progress of the projects committee comprised of people with expertise to expand WHALE's capacity to take direct action
- c. Continue to implement and complete historic development projects in downtown New Bedford that impact quality of life of the community through arts and cultural development
- d. Continue to diversify WHALE's future projects, considering among the potential roles: acquisition and re-development, partnerships with non-profit and for-profit developers, and purchase options
- e. Continue to expand WHALE's work to other neighborhoods in New Bedford
- f. Continue to work with the Attorney General's office and the city to pursue receiver properties
- g. Continue to build a fee-for-service consulting capacity for historic preservation tax-credit projects
- h. Continue to build WHALE's Revolving Loan Fund to use for acquisition, predevelopment costs and construction lending



### ***3. Continue to be a strong voice for historic preservation in New Bedford, identifying and articulating what matters and why***

- a. Continue to strengthen a comprehensive communications plan to convey WHALE's messages to both the general public and targeted audiences through social media
- b. Improve and keep updated the WHALE website to advance the mission and specific goals; maintain an ongoing program to keep the site fresh and drive viewers to it through monthly e-blasts and social media
- c. Continue to refresh WHALE's brand and status as a Community Development Corporation to increase accessibility and understanding of its revitalization power
- d. Build WHALE's Government Relations capacity and communicate regularly with community decision-makers re: historic preservation priorities, values, and benefits
- e. Keep on working towards a diversified and talented Board of Directors that represent the demographics of the city and that bring various areas of capacity

### ***4. Build on WHALE's financial operations capacity for continued growth and stability***

An important goal in the WHALE Strategic Plan is to "Assure that sufficient financial resources are in place for WHALE's current and long-term success". WHALE has acted on many of the short-term and long-term objectives which included applying for certification as both a CHDO and a CDC, creating a President's Council of past Presidents of WHALE, strengthening the new Partners in Preservation Program, and building our Revolving Loan Fund. Over the next five years, WHALE will finance its activities with a multi-pronged approach:

- a. Expand the WHALE Revolving Loan Fund (RLF): The RLF is funded with foundation grants (1772 Foundation), Bank Grants, project grants, and returning project funds. Currently the RLF has \$350,000 and we are planning to grow the RLF in five years to double to \$700,000.

- b. **Expand Developer Fee:** Strive to develop projects that carry a sufficient amount of developer fees that can support overhead costs for the organization. WHALE is building a percentage-based developer fee into its projects or assess a fee for service to provide developer consulting services to projects. We have tripled our developer fee income in the last three years and plan to increase it to over 30% of our operating income by 2023.
- c. **Strengthen and Increase Existing Private Contributions;** WHALE launched a “Partners in Preservation” program with local businesses who support the organization’s work and value the benefits that the preservation projects bring to the revitalization of New Bedford. In the last five years, WHALE has attracted 22 Partners in Preservation who have contributed \$50,000 in 2019 to support our work. With CITC in place, our goal is to continue to grow our Partner in Preservation contributions.
- d. **Increase WHALE Membership Base;** WHALE has a goal to increase its current membership of 350 to 550 over the next five years. Benefits to Members include receiving monthly E-News on projects and programs of WHALE and important issues to New Bedford residents. WHALE members are also a source for our large volunteer base. In the last year, WHALE engaged over 80 volunteers to help with community projects and events.
- e. **Capital Campaign Funding;** WHALE runs capital campaigns to support important projects that require additional private investment. For example, we have completed a \$500,000 capital campaign to restore the Seamen’s Bethel and Mariner’s Home and are running a Capital Campaign for the First Baptist Church project which has raised \$250,000 to date.
- f. **Grants and Foundation Support;** During 2015 to 2019 WHALE has applied for and secured over \$15,000,000 in donations, grants and historic tax credits from state and federal resources as well as foundation support to fund our real estate projects.
- g. **Legacy Fund;** In 2018 WHALE’s President’s Council started a Legacy Fund for the stability of the future of WHALE. Currently the Legacy Fund is at \$80,000 raised through an Annual Legacy Dinner honoring past founders of WHALE. In the next five years, the intent is to grow the Legacy Fund so that it can earn investment income.

***5. Put in place the human resources – staff and volunteer – necessary for WHALE to succeed***

**a. STAFF**

- Continue to develop and implement an appropriate and financially feasible staffing plan for the future growth of WHALE
- Continue to pursue internships with Universities and the utilization of the AmeriCorps Vista program to bring young talent and energy to the organization
- Update WHALE's computers and other technology when necessary to assure staff have the tools to work effectively and efficiently

**b. BOARD OF DIRECTORS**

- Conduct performance review of Board of Directors and by-laws review; make modifications to Board operations accordingly
- Identify areas of expertise, capacity, etc. needed on the Board of Directors to assure WHALE's success; recruit new members to fill voids
- Ensure that the Board's diversity complies with Community Development Corporation's demographic requirements
- Continue an annual orientation program for new Directors

**c. COMMITTEES AND VOLUNTEERS**

- Maintain regular meetings of the following Committees to support the staff and Board to implement the Strategic Plan:
  1. Executive
  2. Board Development & Governance
  3. Finance
  4. Community Committee (Outreach and Education)
  5. Projects



## How Success will be Measured and/or Evaluated

**Real Estate Development:** WHALE's historic preservation/real estate development projects will be evaluated by their success in meeting the specific project timelines, budgets, impact on community and economy and other benchmarks established by WHALE's Project Development Committee. Key Evaluation Measures have been broken down into Predevelopment, Housing, Historic Preservation, Economic Revitalization and Community Development.

### Real Estate Development Key Evaluation Measures:

#### Predevelopment Measures:

- Number of potential development projects identified and evaluated
- \$ Value of Pre-Development and Feasibility Study Grants Secured
- Number of Community Partners Engaged in Feasibility and Pre-Development Activities

#### Housing Real Estate Development Measures:

- Number and proportion of projects that are completed on or under budget
- Number of projects that are completed within the defined time schedule
- Number of new affordable units created
- Number of workforce units created
- Number of First-Time Homebuyer Units Sold

#### Historic Preservation Development Measures:

- Quality and Historic Value of Building to the Community
- # of Buildings saved on the National Historic Register
- # of Buildings saved within Historic Districts
- Number of Historic Facades Restored for Low/Mod Income Homeowners
- \$ Value of Historic Tax Credits Secured

#### Economic Revitalization and Community Development Measures:

- Number of Arts and Cultural Spaces created
- # of Jobs Created through Development Project
- Number of local contractors and staff employed
- Dollar value of project and economic benefit
- Impact of project to streetscape and place-making
- Spin-off revitalization impact for other projects in area

**Education and Advocacy:** WHALE will measure its work in historic preservation and community development education and advocacy by the following measures:

- # of community partners engaged in advocacy work
- # of persons in the community engaged in education and advocacy projects and programs
- Tangible results in engagement process seen through increased membership representing all ages, diverse audiences and range in membership categories
- # of New policies or programs in place that impact success of community development and historic preservation work

**Collaborative Efforts to Support Implementation:** WHALE has a history of collaborating on many of its projects and programs. Following is a list of some recent and current collaborative efforts:

- Howland House: historic restoration for affordable housing, partnering with The Resource, Inc. (TRI), a non-profit housing developer
- First Baptist Church Restoration: Partnering with Your Theatre we are restoring this historic church for a community theater.
- The Port Society Complex, restoration of the Seamen's Bethel and Mariners' Home for a Maritime Museum, partnered with the New Bedford Port Society
- Washington Square Tom Lopes Park, with the South-end community group and the City of New Bedford
- Restoration of Strand Theater: Partnering with the Cape Verdean Association for a new Cultural Center for the North End



As a five-year old designated Community Development Corporation, WHALE has increased its outreach to neighborhood-based organizations and will continue to do so to assist and collaborate on projects that involve the redevelopment of historic properties. WHALE is providing expertise on predevelopment work, including project feasibility studies and business development planning, grant and tax credit application preparation, historic design work in collaboration with project architects, and overall real estate project management. In this way, there will be added capacity in the city to complete historic redevelopment projects.

### **Integration of Activities/Consistency with Community Strategy and Vision**

The WHALE Strategic Plan and Strategic Plan activities are also aligned with New Bedford's community vision and strategy through our partnership with residents and stakeholders, integration of processes and sharing of resources. WHALE is involved with or has Board Representation on the following organizations:

- New Bedford Economic Development Council
- Seaport Cultural District
- AHA! Steering Board
- The Transformative Development Incentive District (TDI)
- MACDC
- Your Theatre
- CEDC
- New Bedford Historical Society
- The Cape Verdean Association
- The New Bedford Port Society
- Roger Williams University
- Zeiterion Theater