



W H A L E

Waterfront Historic Area League

**STRATEGIC PLAN:
2025–2029**

The next chapter in
a tale of ordinary people
who do extraordinary things.

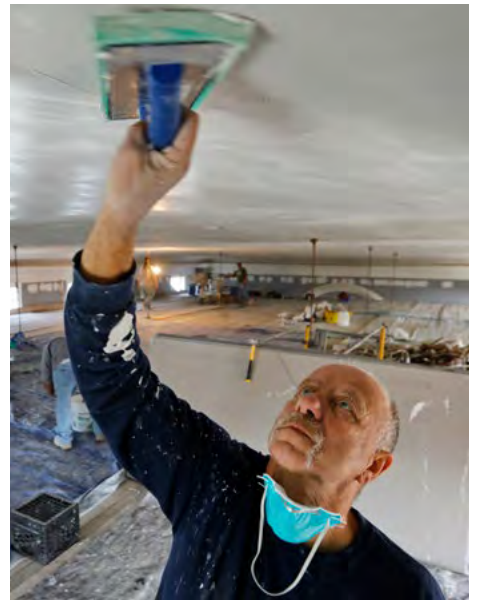
NEW BEDFORD, MASSACHUSETTS



With
underwriting
from:



2024.04.26 DRAFT



We acknowledge that the land where we live, work, and draw inspiration encompasses the traditional and unceded lands of the Wampanoag peoples. We honor their ancestors past, present, and future.



Dear Reader,

On behalf of the WHALE Board of Directors, we are pleased to share with you WHALE's 2025-2029 Strategic Plan.

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With best regards,

Diana Henry
Board President

Erin Miranda
Executive Director

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Part One: Background & Context

*If you bulldoze your heritage,
you become just anywhere”*

Sarah Delano,
WHALE President, 1966-1982

WHALE: Rising to Challenges

When urban renewal threatened entire neighborhoods in 1962, ordinary citizens took action.

The individuals who went on to become the founders of the Waterfront Historic Area League (WHALE) were committed to saving New Bedford's history and architectural heritage from "death by neglect and the tyranny of the bulldozer."

Since its founding, WHALE has facilitated the completion of more than 75 restoration and preservation projects in the New Bedford area, helping to preserve historic architecture and re-purpose buildings for new uses.

Whale's Mission and the Big "Whys"

The mission of WHALE (Waterfront Historic Area League) is to foster historic preservation and continued use of the city's architectural heritage to enhance community and economic vitality in New Bedford.

Why does WHALE take this on as it's mission? Because our members, partners and supporters believe that by preserving New Bedford's historic architecture and adapting old buildings to new uses, we can:

- Stabilize neighborhoods and develop affordable housing
- Foster economic growth and create workforce opportunities
- Expand New Bedford's growing arts and culture sector
- Preserve the city's architectural and multi-cultural heritage

How do we do what we do?

WHALE engages in real estate transactions such as purchasing, rehabilitating, and selling properties, as well as placing deed restrictions. WHALE also achieves its mission through advocacy and education.

Functioning as the only historic preservation non-profit in the country that also operates as a community development corporation (CDC) enables WHALE supporters to leverage Massachusetts's Community Investment Tax Credit (CITC) to bolster community revitalization through historic preservation, a win for our supporters and our community.

Our Vision

With each project, WHALE is helping write the next chapter in the narrative of our city. Working with numerous partners, we create a stronger community that understands its history and has hope for its future.

While the efforts of WHALE are not always top of mind to all citizens, the vitality that WHALE has enabled is felt far and wide. From the relocation and restoration of numerous buildings that now make up the heart of the New Bedford Whaling National Historical Park, to the first the restoration of the Zeiterion Theatre in 1980s, WHALE has played a catalytic role, ensuring that New Bedford is not only a city well loved for its history, but also a place of living culture, where new ideas continue to be fostered and shared.

Recent WHALE projects such as the rehabilitation of the Barker's Lane Block of Union Street, which now houses the Co-Creative Center and People's Pressed demonstrate the potential of New Bedford as a Gateway City to be fertile ground for creative entrepreneurial activity. Through our involvement in the restoration and rehabilitation of numerous historic residences, we have worked to ensure New Bedford maintains high quality mixed-income housing. This speaks to our long-term commitment to New Bedford's housing needs.

Still, there is more work to be done and this strategic plan seeks to address the new challenges that New Bedford faces.

Expanding Impact Through Partnership

Just as preservation is a partnership-driven enterprise, often requiring craftspeople and experts across many fields to work together, WHALE is partnership-driven organization.

Each WHALE project has been taken on in collaboration with active partners within New Bedford community, along with the support of the City of New Bedford and sometimes other partners such as MassDevelopment, the National Park Service.

None of this would be possible without the dedicated financial support of our members, other supporters, and our Partners in Preservation. Over the years, we have come together to find creative ways to bring the resources to bare to ensure that projects are completed. Sometimes projects take longer than anticipated, but with each endeavor we gain new insights about technical as well as social aspects of preservation, and the challenges facing our community.

Similar to other non-profit membership based organizations, the COVID pandemic impacted both our ability to carry out physical work and in person programs, limited our ability to bring members together in the real world. One of the **key priorities** of this plan, which is described in more detail in the following sections is to **re-engage the public in WHALE's mission**, including through more robust and inclusive storytelling, such that we strengthen our relationships with the community, grow our membership, and identify new project partners.

Partnership-building takes on several dimensions. This means:

1. Growing relationships in each New Bedford neighborhood that includes historic building stock (which is almost all of them!) so that we can understand needs in a granular way, from hyper-local perspectives.



Many hands make light work.

2. Building relationships with the real estate (re)development community, so that WHALE is one of the “first stops” for any developer contemplating investing in New Bedford, with the intent that WHALE can bolster local efforts as an important educational resource, possibly a technical preservation advisor, and for some projects, a co-investor.
3. Advancing relationships with the New Bedford creative community so that they can help WHALE tell it's story, expanding understanding about the impacts of the organization while helping to create a more nuanced understanding of New Bedford by sharing multiple perspectives and viewpoints.
4. Sharing our research findings with state, national and international preservation organizations, to ensure New Bedford's preservation know-how is disseminated broadly and is ever evolving.
5. Advocacy: ensuring our elected delegation is aware of the social and economic impacts of investments supported by the Community Investment Tax Credit, as well as the work that WHALE and its partners do on behalf of New Bedford.



Part Two: Process



Conversations and Synthesis

The Strategic Planning Process

In strategic planning, it is often said that the process is as important, if not more important, than the plan. It is the process that drives not only the creation of the plan document, but also the community's willingness to "stewards" of the plan, using it as a living document, open to evolution, rather than a static reference.

The Strategic Planning Committee, together with more than 20 WHALE board members and community partners who were interviewed shared numerous ideas. These were then organized into five priority areas and shared in advance with participants of an all day retreat (April 6, 2024) that included participation of WHALE board members and a number of organizational partners. During the retreat, participants discussed strengths, weaknesses, opportunities and challenges of the organization, which are summarized below. (Note points that include a slash "/" in the lists that follow represent similar responses by different individuals.) Then then worked together to draft from the ideas discussed a set of twelve key goals and actions and a draft work plan strategy for achieving them.

Following the retreat, the Strategic Planning Committee reviewed the retreat work and asked the Finance Committee to comment on select actions that have significant financial implications for WHALE.

A draft version of the resulting plan was presented to retreat participants for feedback and also made available on WHALE's website for feedback by the broader community.

Collected feedback was then reviewed and incorporated, and a final version of the strategic plan was revised and accepted by the Strategic Planning Committee before presentation at the 2024 Annual Meeting. [edit in progress]

Themes

- Sustainability of the organization over the years
- Community value(s) - current and ongoing
- Community and neighborhood outreach
- Partnership
- Inclusivity
- Engagement
- Be real about projects / better project criteria / need new project evaluation criteria
- create unused buildings into housing, especially churches
- WHALE's enriching the city at all levels of impact—must be ongoing
- Leverage (can mean many things)
- Practice
- Innovative / innovation
- Education
- Credibility in technical historic preservation expertise. We have it and should grow it.

Community Challenges

- Inflation
- Affordability (particularly, housing)
- Housing costs and limited supply
- Workforce development that provides alternatives to costly higher education
- Climate change
- Changing technology / AI
- An aging population

Organizational Challenges

- Better criteria for project selection
- Risk versus reward of more housing / historic building challenges
- Finding—or remembering—our "why(s)"
- Funding
- Finding balance of engaging with projects and taking on
- Changes in the city: need vs. wants
- Rebuilding presence and relationship with the community

Themes, Challenges & Opportunities

- Community involvement
- WHALE’s image in neighborhoods
- Financial stability / uncertain funding / sustainable funding to allow staff time on projects & map!
- Member engagement / how to engage in new ways, for example with New Bedford and/or WHALE-branded swag
- Membership growth and better revenue sources / increasing membership
- “Selling ourselves” (promoting the organization and its achievements; what membership offers)
- Balance (projects vs. other use of resources) / financial capacity / balance
- Staff
- Clarity of direction and communication of value
- Building an endowment

New Opportunities

WHALE has a wealth of knowledge about New Bedford’s building stock and now, new mapping tools at its disposal. Working with partners, we can be proactive in identifying buildings that are in need of attention and reach out to property owners to be sure they are aware of preservation related resources, including grants, loans and technical assistance, available.

“Hats” (I am excited to ...)

- Support meetings with potential donors.
- Provide technical expertise.
- Lead WHALE / be a leader.
- Be recognized as leading a preservation organization.
- Be creative and a cheerleader / find balance between creativity and reality.
- Revitalize WHALE’s many missions / outside of development (education, engagement, workforce development, etc.).
- Be a storyteller: how WHALE saved xyz.
- Be a partner / cheerleader.

- Be a skill developer.
- Be active in future projects work.
- Be a mechanic with vision.
- Be in involved in outreach as an interpreter.
- Be involved in hands on work projects.
- Be grass roots! Build NB citizens & business.
- Be a financial interpreter.

Guiding Principles

The guiding principles listed below represent a “synthesis” of intentions communicated during interviews, committee meetings and the strategic planning retreat. These speak not so much to what WHALE takes on, but how it works within the New Bedford community. They provide a checklist of sorts, to guide decision-making and reflection:



Be a partnership-driven organization.



Expand preservation know-how and expertise.



Be data-informed and measure impacts.



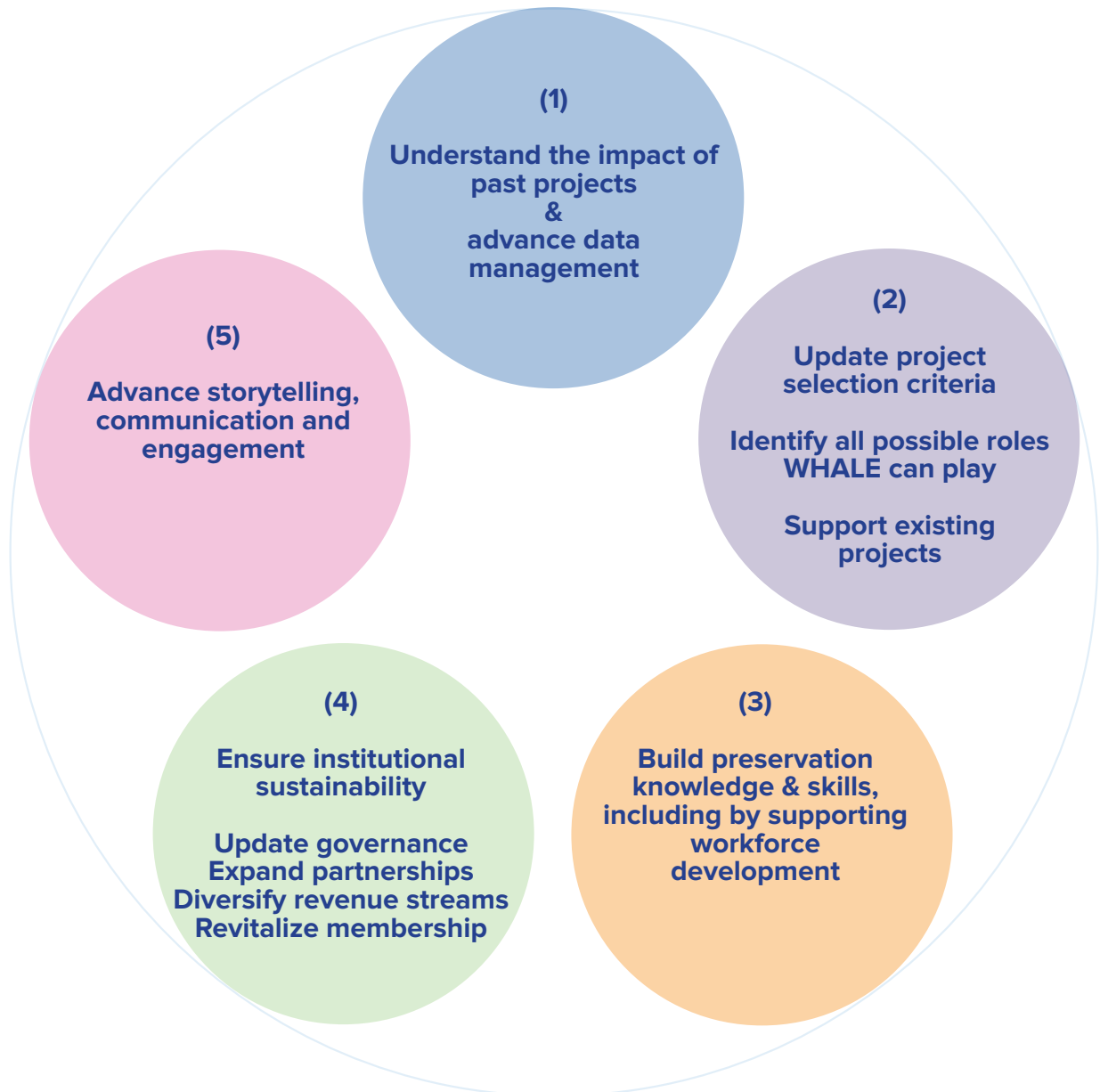
Grow preservationists!



Tell compelling stories about what WHALE has set in motion.

Developing Priorities

PRIORITY AREAS:



The five priority intervention areas identified serve as a tool for categorizing the many generative ideas that were produced during the planning process.

During the retreat, participants organized and advanced the ideas, shaping them into a set of goals and sequential actions. These are outlined in the next part of this report.

Importantly, certain themes, such as partnership-building, cut across all of these areas.



Part Three: Priorities & Goals

“New Bedford—it was a place where I might really make a difference.”

John Bullard,
Hometown

From Ideas to Strategy

Priority Areas and Related Goals

This plan is organized into a total of twelve interrelated goals across the five priority areas identified. Following this list is a table for each goal, including a number of “why” statements, followed by a list of key actions to operationalize the goal, together with information on potential partners and their roles, WHALE’s role, and milestones/metrics. A by-year work plan follows and includes organizational targets for membership growth, legacy fund growth, and staffing.

Understand the impact of past project and advance data management.

- 1 Understand the impact of past projects and advance data management.

Update the project selection criteria and process.

- 2 Update project selection criteria and process.

Build preservation knowledge and skills, including by supporting workforce development.

- 3 Broaden who is engaged in preservation.
- 4 Develop a preservation “continuum of learning” across educational stages that encompasses building/architectural history and hands-on learning.

Ensure institutional sustainability.

- 5 Revitalize membership and recruit more members for committees.
- 6 Expand and diversify WHALE’s revenue streams and identify other sources of project capital.
- 7 Grow WHALE’s legacy fund.
- 8 Strengthen relationship with community funders and expand utilization of the revolving loan fund.
- 9 Update accounting to include project budgets in separate accounts and track key metrics in a simple dashboard.

Advance storytelling, communication and engagement.

- 10 Involve more voices in storytelling to broaden understanding of WHALE’s mission, its achievements, and its active / potential future work.
- 11 Develop user-friendly preservation technical sources and knowledge sharing opportunities on the “hows” of preservation.
- 12 Engage the community at the neighborhood level.

Goal #1: Understand the impact of *past* projects.

Whys:

- To understand the direct and indirect impacts of past projects
- To understand successes, challenges, time and money costs in retrospect
- To share findings with the community, partners and supporters
- To guide decision-making and processes going forward

| Actions | Potential Partners / roles | WHALE's roles | Metrics / Milestones |
|--|---|---|--|
| 1) Develop criteria. | <ul style="list-style-type: none"> • City Departments • NBEDC • National Park Service • Community Organizations • Spinner • Mass Historic Commission • Funding partners • Politicians | Staff and projects committee: <ul style="list-style-type: none"> • Manage process • Identify project list • Set up database | <ul style="list-style-type: none"> • Criteria and fillable database templates developed |
| 2) Choose database software and format database. | Software provider or other may provide technical service and training | Staff: <ul style="list-style-type: none"> • Undertake / provide input | |
| 3) Pull information from project records and input into database. | | Staff: <ul style="list-style-type: none"> • Guide volunteers and interns | <ul style="list-style-type: none"> • Complete project list developed • Schedule and workflow developed |
| 4) Conduct interviews with past project users / partners. Input into database. | <ul style="list-style-type: none"> • Project partners • Organizations / people using buildings • Impacted community members / neighbors | Staff, volunteers & interns: <ul style="list-style-type: none"> • Identify projects and interview topics • Do interviews • Transcribe and input | <ul style="list-style-type: none"> • Interview schedule developed • 100% interviews complete |
| 5) Coordinate records digitization. | Whaling Museum: for utilization of scanning equipment and metadata development (?) | Staff, volunteers & interns: <ul style="list-style-type: none"> • Identify potential grant funding • Coordinate with Whaling Museum | <ul style="list-style-type: none"> • Funding needs identified • Grants research undertaken • Funding secured • 100% data entry and verification completed |
| 6) Integrate data into GIS / Places That Matter - Greenprint Map (mapping project underway) | <ul style="list-style-type: none"> • City Departments • Trust for Public Land (mapping partner) • WHALE website developer | Staff and projects committee: <ul style="list-style-type: none"> • Define mapping goals and priorities • Share maps • Maintain data | <ul style="list-style-type: none"> • Have a comprehensive map of WHALE impacted projects on the website • Be able to utilize this with other WHALE mapping layers and city data |
| 7) Analyze findings to guide new project selection [See goal #2] | Past project partners Current project partners | Staff and projects committee: Perform analysis and share findings with partners/funders, etc.; use data to inform current project selection | <ul style="list-style-type: none"> • Ability to run time/cost reports on past projects and search data effectively • Be transparent with the public about past projects challenges |

Goal #2: Update project selection criteria and process to supports WHALE’s mission and focuses on community engagement, significance of property while ensuring financial sustainability.

Whys:

- To ensure project commitments do not supersede available staff and financial resources
- To ensure WHALE strikes a balance between major physical projects and other activities, including: strategic roles in small and/or distributed projects, community engagement and storytelling
- To expand the ability to support partners’ efforts, such that preservation experience grows across New Bedford
- To ensure WHALE can execute all its roles well and be resilient in the face of unexpected events

| Actions | Potential Partners / roles | WHALE’s roles | Metrics / Milestones |
|--|--|---|--|
| 1) Convene a diverse (experienced) ad hoc committee community pulling from finance and governance | Other preservation organizations that do similar work: • Engage them to understand their criteria and process | • Staff and members help to identify participants | |
| 2) Develop criteria | | • Projects Committee drafts criteria and solicits feedback | |
| 3) Develop a decision-tree with all possible to roles identified to assist with deciding what, if any, role WHALE should play on a project and what resources it may tap. | Community / neighbors: • Ask them to help contribute to project evaluations | • Projects Committee drafts decision tree and solicits feedback • Staff shares information on WHALE’s website and through programs, to make inquiry process more efficient | • Partners / potential partners should be able to see visually where they might play a role in individual projects. • WHALE is perceived as open/transparent with the public, with stakeholders about preservation challenges |
| 4) Ensure project commitment goals match WHALE’s available funding and staffing | | • All Committees reviews preliminary proforma information / budgets against available resources | • Projects completed in a timely manner and on budget |
| 5) Review the criteria annually and evolve as needed | | • Consultant / technical specialist | • Community recognition |

Goal #3: Broaden who is engaged in preservation.

Whys:

- To change perceptions, increase pride of place and “grow” preservationists
- To make preservation synonymous with *opportunity for community enhancement*
- To keep conversations about historic preservation relevant to timely community issues

| Action | Potential Partners / roles | WHALE’s roles | Metrics / Milestones |
|---|---|--|---|
| 1) Develop a preservation “continuum of learning” that is specific to New Bedford / the SouthCoast [See also Goal #4] | <ul style="list-style-type: none"> • Established trade schools • Contractors • Unions • Developers | <p>Staff and members:</p> <ul style="list-style-type: none"> • Identify key gaps to be addressed | <ul style="list-style-type: none"> • Increased/sustained advocacy for preservation workforce development by the Commonwealth of MA |
| 2) Create an Interactive neighborhood-based model for engagement [See also Goal #12] | <ul style="list-style-type: none"> • Neighborhood Associations • City departments • All schools at all levels (overtime) | <p>Staff and members with key expertise:</p> <ul style="list-style-type: none"> • Knowledge resource • Advocate | <ul style="list-style-type: none"> • Preservation understood as a tool in neighborhood development • Increase in students practicing preservation |
| 3) Launch Historic Happy Hours & Open Houses [See also Goal #5] | <ul style="list-style-type: none"> • Bars/restaurants • Historic home owners | <p>Community Outreach & Membership</p> | <ul style="list-style-type: none"> • Social engagement plus learning about preservation achieved • Membership increased |
| 3) Talk about preservation through the lens of sustainability and climate change | <ul style="list-style-type: none"> • National Parks Service • Historical Societies • Neighborhood Associations | <p>Staff and members:</p> <ul style="list-style-type: none"> • Provide technical expertise to co-develop case studies and workshops | <ul style="list-style-type: none"> • Case studies published • Workshops held |
| 4) Expand WHALE preservation awards to acknowledge a broader range of participants in preservation, including practitioners, property owners, property activators / storytellers, and educators. | <ul style="list-style-type: none"> • All of the above | <p>Staff and projects committee:</p> <ul style="list-style-type: none"> • Create categories • Solicit nominees • Integrate into annual awards program • Tell stories of their contributions | <ul style="list-style-type: none"> • 2025 Awards program expanded • Ongoing conversations about community enhancement through preservation |

Goal #4: Develop a preservation “continuum of learning” across educational stages that encompasses history, building/architectural history, and hands-on learning.

Whys:

- To start historic preservation education as early as possible
- To ensure a broad range of skills is sustained in New Bedford
- To contribute to workforce development, particularly trades that require specialized training but not necessarily college degrees
- To be a recognized preservation leader

| Action | Potential Partners / roles | WHALE’s roles | Metrics / Milestones |
|---|--|---|--|
| 1) Create learning modules with after school and summer learning programs, including art and science programs | <ul style="list-style-type: none"> • Educators from relevant programs • New Bedford Creative Consortium (animators/filmmakers?) | Staff + Community Outreach & Membership | <ul style="list-style-type: none"> • Program developed and co-promoted |
| 2) Share WHALE coloring books and create new content | <ul style="list-style-type: none"> • New Bedford Whaling National Historical Park • After School Programs | Staff | <ul style="list-style-type: none"> • Social media campaign / coloring contest? |
| 3) Develop family-oriented treasure hunts for AHA! Nights | <ul style="list-style-type: none"> • AHA! • Local businesses • Other arts + culture organizations | Staff + Community Outreach & Membership | <ul style="list-style-type: none"> • Social media campaign / contest? |
| 4) Provide career exposure opportunities for VocTech students. | <ul style="list-style-type: none"> • National Trust for Historic Preservation • Local trade organizations | Staff + Community Outreach & Membership | <ul style="list-style-type: none"> • Easy access to information on Internships and apprenticeship opportunities |
| 5) Identify internship and research opportunities for students in regional undergraduate and graduate level programs | <ul style="list-style-type: none"> • UMass Dartmouth NEW historic preservation classes • Roger Williams • National Park Service • New Bedford Preservation Society | Staff + Community Outreach & Membership + Projects Committee | <ul style="list-style-type: none"> • Easy access to information on website • Share and feature resulting programs and research generated |
| 6) Work with trade organizations on a program to highlight trades and trades innovation | <ul style="list-style-type: none"> • Local (and national / international?) trade organizations | Staff + Community Outreach & Membership | <ul style="list-style-type: none"> • Easy access to information on website • Profiles of individuals and innovation; coordinate with site visits / tours, etc. |
| 7) Plan and host a bi-annual preservation conference | <ul style="list-style-type: none"> • Universities • Trade organizations • New Bedford Preservation Society • Explore New Bedford • History Above Water Conference Program (?) | Staff and Committees <ul style="list-style-type: none"> • Coordinate with Fundraising and Events | <ul style="list-style-type: none"> • Conference successfully held by end 2029 |

Goal #5: Revitalize membership and recruit more members for committees.

Whys:

- To expand organizational impact
- To accomplish a lot with a relatively small staff
- To ensure WHALE membership reflects the New Bedford community as much as possible

| Actions | Potential Partners / roles | WHALE's roles | Metrics / Milestones |
|--|--|---|---|
| <p>1) Identify expertise needs as well as community representation goals across all projects, the Board of Directors and committees. Plan systematic outreach to fill gaps.</p> | <ul style="list-style-type: none"> • Ask partners past and present to help identify community members who can fill skill and community representation gaps. • Solicit input from the New Bedford Creative Consortium | <p>Staff + Board of Directors:</p> <ul style="list-style-type: none"> • Inventory needs and engage partners • Lead board diversity self-reporting survey • Host an open call for Board Member applications. | <ul style="list-style-type: none"> • Launch open call by (date) |
| <p>2) Better develop and articulate membership benefits</p> | | <p>Community Outreach & Membership:</p> <ul style="list-style-type: none"> • Lead membership program revamp & recruitment | <ul style="list-style-type: none"> • Seek and integrate feedback from existing members as well as potential new members |
| <p>3) Establish membership growth and program participation goals for each year of the next five years.</p> | | <p>Community Outreach & Membership: + Finance Committee:</p> <ul style="list-style-type: none"> • Collaborate on goals and campaign | |
| <p>4) Create WHALE SWAG to promote and strengthen the WHALE brand, recognize and reward members and supporters.</p> | <ul style="list-style-type: none"> • New Bedford Creatives • The Explore New Bedford team (to coordinate messaging campaigns) | <p>Community Outreach & Membership::</p> <ul style="list-style-type: none"> • Oversee SWAG product design, production and promotion/distribution | |
| <p>5) Increase staffing to ensure adequate coverage of goals, especially membership and engagement and development goals</p> | | <p>Staff + Board of Directors:</p> <ul style="list-style-type: none"> • Identify staffing priorities and timeline/resources for staffing increase | <ul style="list-style-type: none"> • Sound “three-legged” stool achieved to ensure coverage and continuity • Be in a position to outsource / hire contractors for certain tasks (technical project management) etc. |

Goal #6: Expand and diversify WHALE’s revenue streams and identify other sources of project capital.

Whys:

- To enable WHALE to add staff
- To increase WHALE’s ability to bring capital into preservation projects on behalf of its partners

| Actions | Potential Partners / roles | WHALE’s roles | Metrics / Milestones |
|--|--|---|--|
| <p>1) Broaden communication to donors about the Community Investment Tax Credit</p> | <ul style="list-style-type: none"> • Commonwealth of Massachusetts • Accountants (?) | <p>Staff and Fundraising & Events Committee:</p> <ul style="list-style-type: none"> • Update guidance documents • Plan outreach to the community, including accountants • Hold workshop and produce as short video tutorial • Set goals for total increases in CITC participation by year. | <ul style="list-style-type: none"> • CITC participation count is increased 20% by end of 2025 |
| <p>2) Ensure WHALE is compensated fairly for time it spends providing technical expertise on projects.</p> | <ul style="list-style-type: none"> • Project partners (joint venture developers) • Project partners (when WHALE is providing preservation services) • City of New Bedford | <p>Staff:</p> <ul style="list-style-type: none"> • Develop best practices and template for MOUs and contracts • Use time tracking software (already in place) | <ul style="list-style-type: none"> • Be able to produce estimates of hours based upon analysis of past projects |
| <p>3) Explore opportunities to expand preservation services, including tax credit consulting.</p> | <ul style="list-style-type: none"> • Project partners (joint venture developers) as well as other project owners and developers | <p>Staff:</p> <ul style="list-style-type: none"> • Analyze needs in market • Develop best practices and template for MOUs and contracts • Use time tracking software (already in place) | <ul style="list-style-type: none"> • Be able to produce estimates of hours based upon analysis of past projects • “Market” services via WHALE’s website, newsletters, and project meetings |
| <p>4) Work with partners to help property owners identify opportunities to combine preservation funds with other community development funding sources (grants and loans)</p> | <ul style="list-style-type: none"> • City of New Bedford Housing and Urban Development, including CDBG • NBEDC • SCCF • Banks • Other granting entities | <p>Staff:</p> <ul style="list-style-type: none"> • Holds regularly meetings and shares information with City of New Bedford staff as well as NBEDC • Collaborates on communication to the public | <ul style="list-style-type: none"> • Be able to point to projects that leverage multiple sources of fundings and use these as case studies for others |

Goal #7: Grow WHALE’s legacy fund.

Whys:

- To ensure organizational resilience
- To grow funds such that WHALE can explore the formation of an endowment in the future

| Actions | Potential Partners / roles | WHALE’s roles | Metrics / Milestones |
|---|--|---|--|
| <p>1) Revisit / refine sourcing and utilization guidelines</p> | <ul style="list-style-type: none"> • Past major donors: seek input on legacy fund priorities | <ul style="list-style-type: none"> • All Committees and Staff update guidelines • Board of Directors vote on updated guidelines • Staff ensures updated information is communicated | <ul style="list-style-type: none"> • Guidelines updated by end of 2024 (quick win) |
| <p>2) Contribute a small percentage of developer fees to the fund</p> | | <ul style="list-style-type: none"> • Finance Committee and Staff determine percentage • Board of Directors approves • Staff ensures updated information is communicated | <ul style="list-style-type: none"> • Account process developed and project documentation developed • Be able to report on total annual contribution |
| <p>3) Establish annual growth targets and plan campaign</p> | | <p>Fundraising & Events Committee</p> <ul style="list-style-type: none"> • Sets targets and campaign strategy / leads • Board of Directors approves • Staff ensures updated information is communicated | <ul style="list-style-type: none"> • Grow by \$100,000 by the end of 2024 • Annual growth of \$100,000 through each strategic plan year |
| <p>4) Craft a message to communicate that investment in WHALE projects is support of the New Bedford community</p> | | <p>Fundraising & Events Committee, together with Community Outreach & Membership Committee</p> | <ul style="list-style-type: none"> • Increase in utilization of CITC and contributions to Legacy Fund |
| <p>5) Provide staff and Board of Directors ongoing fundraising training</p> | <ul style="list-style-type: none"> • SouthCoast Community Foundation • Free or low cost resources, such as Fundraising • Fundraising consultants when necessary | <p>Staff + Board Members with fundraising expertise</p> | <ul style="list-style-type: none"> • A greater number of board members are involved in fundraising and comfortable making direct asks • Ongoing learning and improvement, response to real time conditions and opportunities |

Goal #8: Strengthen relationship with community funders and expand utilization of the revolving loan fund.

Whys:

- To expand WHALE’s role as a facilitator of capital, rather than a primary capital source
- To ensure that investments in preservation strategically support community development goals
- To ensure donors and potential donors have a clear and efficient path to investing in preservation

| Actions | Potential Partners / roles | WHALE’s roles | Metrics / Milestones |
|--|--|---|--|
| 1) Share the Strategic Plan with all partners | <ul style="list-style-type: none"> • All partners | Staff and Members: <ul style="list-style-type: none"> • Meet with key partners to gain additional feedback and insight. | |
| 2) Meet with the SouthCoast Community Foundation to address common community development objectives | <ul style="list-style-type: none"> • SCCF • Other funders • Banks • Individuals | Staff and Board of Directors: <ul style="list-style-type: none"> • Communicate WHALE as a resource and key player in community and economic development | |
| 3) Identify other funders / investors, including banks and individuals related to specific projects | N/A | Staff, Projects Committee and Finance Committee | |
| 4) Match plan objectives to specific funding partners and types of capital (grants, etc.) | | Staff, Projects Committee and Finance Committee | Grant inventory / deadline schedule developed for WHALE directed projects and also shared with the community |
| 5) Explore with partners the opportunity to expand the utilization of the revolving loan fund to provide grants to historic home owners/buyers and small businesses | <ul style="list-style-type: none"> • City of New Bedford Housing and Urban Development, including CDBG as potential loan administrator • NBEDC | Staff, Projects Committee, or special Ad Hoc committee, TBD | |

Goal #9: Update accounting to include project budgets in separate accounts and track key metrics in a simple dashboard.

Whys:

- To achieve sustained transparency around organizational health and finances
- To enable more flexible reporting
- To grow financial literacy related to organizational management and preservation project management among all board members

| Actions | Potential Partners / roles | WHALE's roles | Metrics / Milestones |
|---|--|---|--|
| <p>1) Migrate accounting to a cloud-based version of Quickbooks</p> | <ul style="list-style-type: none"> • Non-profit accountant technical specialist | <p>Staff and Finance Committee:</p> <ul style="list-style-type: none"> • Update accounting system and define reports | <p>Migration complete and reports set up by Q1 2025</p> |
| <p>3) Establish individual project accounts</p> | <ul style="list-style-type: none"> • Banking partners | <p>Staff and Finance Committee:</p> <ul style="list-style-type: none"> • Establish new accounts as needed • Update accounting system | <ul style="list-style-type: none"> • New bank accounts established as new projects come online • Key information integrated into dashboard |
| <p>2) Set up a "dashboard" of key metrics to measure strategic plan progress and to provide a comprehensive view of individual project budgets and progress.</p> | <p>N/A</p> | <p>Staff and Committees:</p> <ul style="list-style-type: none"> • Define dashboard and who is responsible for updating data <p>Finance Committee:</p> <ul style="list-style-type: none"> • Manage project budgets and provide updates | <ul style="list-style-type: none"> • Dashboard version 01 (mock up) created as part of strategic planning process. • By end of 2024: update to version 02 and utilize by (quick win) |

Goal #10: Broaden understanding of WHALE’s mission, its achievements, and its active / potential future work.

Whys:

- To better engage WHALE members and build trust in the broader community (explain what we do, why we do it, how we do, who we do it with and who we do it for)
- To revitalize and grow membership
- To expand revenue generation via membership, partnerships and organizational grants
- For effective, engaging and educational storytelling
- To capitalize on film making skills of current staff and within the creative community
- As a way to produce content that can be shared widely

| Actions | Potential Partners / roles | WHALE’s roles | Metrics / Milestones |
|--|---|--|---|
| 1) Tell stories of individual and cumulative impacts (buildings saved, project successes) | New Bedford Creative: media list | Community Outreach & membership Committee + Staff: <ul style="list-style-type: none"> • Communications Plan | |
| 2) Use database information to advance storytelling and knowledge sharing | New Bedford creative community | Staff + Volunteers: <ul style="list-style-type: none"> • Integrate with project information (historic photos, etc.) to tell great stories about past achievements and share lessons learned. | <ul style="list-style-type: none"> • Be able to tell stories of past WHALE impacts in a more comprehensive way. • Be able to analyze economic impacts • Share project reports with creatives to guide their storytelling |
| 3) Invite New Bedford Creatives to utilize WHALE legacy content (8 track tapes, VCR etc.) | <ul style="list-style-type: none"> • New Bedford Creative Consortium • New Bedford filmmakers • Spinner Publications | Community Outreach & Membership Committee + Staff: <ul style="list-style-type: none"> • Provide access to content | |
| 4) Explore program partnership with Cable TV and/or release content on YouTube | | Community Outreach & Membership Committee + Staff: <ul style="list-style-type: none"> • Provide access to content and/or upload | |
| 5) Target programming for Chronicle | | Community Outreach & Membership Committee + Staff: <ul style="list-style-type: none"> • Communications Plan | |
| 6) Co-produce a film about WHALE that lands on PBS | <ul style="list-style-type: none"> • New Bedford filmmakers | Community Outreach & Membership Committee + Staff: <ul style="list-style-type: none"> • Communications Plan | |

Goal #11: Develop user-friendly preservation technical sources and knowledge sharing opportunities on the “hows” of preservation [relates closely to Priority Area 3]

Whys:

- To be a valued preservation resource for the New Bedford community
- To communicate key information and “reduce friction” in the preservation process
- To grow preservationists and membership

| Actions | Potential Partners / roles | WHALE’s roles | Metrics / Milestones |
|--|---|--|--|
| Housing: 1) Create a Handbook for Homeowners of Historic Homes | <ul style="list-style-type: none"> • City Departments • Local banks • Local trade organizations • Realtors • New Bedford Creatives (help with visuals) | Staff plus all committees: <ul style="list-style-type: none"> • Production lead | <ul style="list-style-type: none"> • Expanded content is available via website and reviewed in workshops • Resources address a greater variety of housing types and new content/research is added periodically • WHALE is looked to as a key knowledge holder about particular housing types, ex: triple deckers! |
| Housing: 2) Expand educational workshops program | <ul style="list-style-type: none"> • Rotch-Jones-Duff House & Garden Museum • Others | Staff and Members: <ul style="list-style-type: none"> • Develop program outlines • Promote workshops • Present information | <ul style="list-style-type: none"> • Workshops developed for diverse audiences / property owners and housing types |
| Small Businesses: 3) Create a small business resource guide | <ul style="list-style-type: none"> • City of New Bedford • NBEDC • New Bedford Creatives (help with visuals) | Staff plus all committees: <ul style="list-style-type: none"> • Production lead | <ul style="list-style-type: none"> • Content is available in print, on WHALE’s website, and reviewed in workshops • New content is added periodically |
| Small Businesses: 4) Develop a site visit program to feature facade improvements, etc. | <ul style="list-style-type: none"> • TDI partners • Neighborhood organizations | Staff plus all committees: | <ul style="list-style-type: none"> • Content is available in print, on WHALE’s website, and reviewed in workshops • New content is added periodically |
| Development Opportunities: 5) Create annual map-based list of preservation opportunities | <ul style="list-style-type: none"> • City Departments • NBEDC • MassDevelopment/TDI | Staff + Projects Committee: <ul style="list-style-type: none"> • Produce an annual “preservation opportunities” list | <ul style="list-style-type: none"> • Start with just a list in January 2025 • January 2026: Publish more detailed information |
| Development Opportunities: 6) Co-host developer tours in New Bedford | <ul style="list-style-type: none"> • NBEDC • MassDevelopment/TDI | Staff + Projects Committee | <ul style="list-style-type: none"> • Start in 2025 |
| 7) Reach out to CPA newbies to educate on where they can go for funding projects | New Bedford Historical Society | Staff + Community Outreach & Membership Committee | <ul style="list-style-type: none"> • WHALE functions as a resource and convener |

Goal #12: Engage the community at the neighborhood level.

Whys:

- To convey that WHALE is a preservation partner for all neighborhoods
- To grow trust and identify new opportunities for collaboration
- To help celebrate, preserve and grow appreciation of the unique cultural heritage of each neighborhood
- To grow preservationists and membership

| Actions | Potential Partners / roles | WHALE's roles | Metrics / Milestones |
|--|---|---|---|
| 1) Continue to develop and utilize the Places That Matter Greenprint Mapping | <ul style="list-style-type: none"> • Trust for Public Land | Staff + Community Outreach & Membership Committee | <ul style="list-style-type: none"> • Maps providing context and data are integrated into almost every piece of WHALE storytelling |
| 2) Coordinate with other community organizations to develop new content for walking tours | <ul style="list-style-type: none"> • New Bedford Historical Society • New Bedford Preservation Society • New Bedford Creative • Explore New Bedford | Staff + Community Outreach & Membership Committee | <ul style="list-style-type: none"> • Appreciation for projects completed • Awareness of preservation opportunities |
| 3) Invite neighbors and the broader community to share input on project evaluations via locally-hosted meetings and WHALE's website | <ul style="list-style-type: none"> • Neighborhood associations and other anchor organizations (CEDC, etc.) [Help with engagement and translation, etc.] | Staff + Community Outreach & Membership Committee | <ul style="list-style-type: none"> • Be open / transparent with the public about challenges on current projects • Evidence of increased understanding of what all WHALE does and increased positive community perceptions [via survey, feedback , etc.] |
| 4) Broadcast and explain WHALE's project selection criteria in a transparent manner [related to Goal #02] | <ul style="list-style-type: none"> • Neighborhood associations and other anchor organizations (CEDC, etc.) [Help with engagement and translation, etc.] | Staff + Community Outreach & Membership Committee <ul style="list-style-type: none"> • Share project selection criteria and decision-tree information on WHALE's website • Explain processes in public meetings | <ul style="list-style-type: none"> • Promote community learning and community engagement (preservation can be complex). |
| 5) Continue WHALE's plaque program to be sure that all WHALE-touched projects have visible plaques | Property owners | Fundraising & Events Committee | <ul style="list-style-type: none"> • Increased property owner pride • Be able to create walking tours based upon plaques |
| 6) Plan Preservation Month (May) activities at the neighborhood level | <ul style="list-style-type: none"> • AHA! • Neighborhood organizations and other anchor organizations | Staff + Community Outreach & Membership Committee | <ul style="list-style-type: none"> • Increased participation • Increased awareness that preservation is taking place across the city |

Strategic Plan: Work Plan by Year

| PRIORITY AREA | 2024 Q3 & Q4: | 2025 | 2026 |
|---|---|--|---|
| <p>Advance data management & Understand past project impacts</p> | <p>Develop evaluation criteria for past projects</p> <p>Select and develop database</p> | <p>Conduct Interviews with past project partners</p> <p>Database input</p> | |
| <p>Projects: Update project selection criteria</p> | <p>Develop selection criteria & decision tree / review process for new projects</p> | <p>Expand public engagement in project selection</p> <p>Manage Ongoing Projects, use PM and Database Templates</p> <p>Places That Matter - Greenprint Mapping (GIS)</p> | <p>Integrate vulnerable pro</p> |
| <p>Build preservation knowledge & skills</p> | <p>Map out a continuum of learning opportunities and confirm partners</p> | <p>Launch Historic Happy Hours & Open Houses: Social engagement + learning about preservation</p> <p>Develop program for public, including kids</p> | <p>More skills workshops (contractors, window restoration, small biz)</p> |
| <p>Ensure institutional sustainability</p> | <p>Cloud-based accounting & dashboards</p> <p>Define target revenue streams</p> <p>Promote CITC</p> | <p>Understand staff & BOD skills and representation gaps</p> <p>Revitalize membership (strategy, SWAG, Benefits)</p> | <p>Open call for board member applications</p> <p>Outreach to partners to forge relationships and support new partnerships</p> <p>Engage board and volunteers for tasks</p> <p>Strengthen relationships with funders / Grow Legacy Fund</p> |
| <p>Advance storytelling, communication & engagement</p> | <p>Use new film at NBWNHP, YouTube, etc.</p> <p>May Preservation Month Program</p> | <p>Continue Historic Homeowner Workshops</p> <p>Neighborhood-based engagement & partner needs survey</p> <p>May Preservation Month: Programs, Plaques and Awards</p> | <p>Historic Homeowner Resource Guide</p> <p>Co-develop project profiles with E</p> <p>Make WHALE content available to New Bedford Creatives</p> <p>May Preservation Month: Programs, Plaques and Awards</p> |
| <p>Membership</p> | <p>+10%</p> | <p>+20%</p> | <p>+20%</p> |
| <p>Legacy Fund</p> | <p>+\$100,000</p> | <p>+\$100,000</p> | <p>+\$100,000</p> |
| <p>Staff Additions</p> | <p>Contract as needed</p> | <p>Contract as needed +1 FTE</p> | <p>Contract as needed</p> |

Major projects / initiatives, underway:

Major projects / initiatives, new:

| | 2027 | 2028 | 2029 |
|--|---|---|---|
| | <p>Integrate past project information into GIS</p> <p>Scan photos and records; archive and link digital to database</p> | <p>Measure project impacts / share findings</p> | |
| | | | |
| | <p>Integrate properties lists and data into GIS</p> | | |
| | | | |
| | <p>Develop preservation curriculum with schools</p> | <p>Partner with vocational schools and colleges to create trades pipeline</p> | |
| | <p>Revolving Loan Fund: info gather and partner discussions</p> <p>Manage partnerships</p> <p>Manage membership campaign</p> <p>Manage volunteers</p> | <p>Revolving Loan Fund: Program Development</p> | |
| | <p>Small Biz Resource Guide & Site Visit Program</p> <p>Explore New Bedford, Chronicle, etc.</p> | <p>Start conference planning</p> <p>PBS / Feature Doc Film</p> | <p>Host conference</p> |
| | <p>Developers' Tour</p> <p>May Preservation Month: Programs, Plaques and Awards</p> | <p>Developers' Tour</p> <p>May Preservation Month: Programs, Plaques and Awards</p> | <p>Developers' Tour</p> <p>May Preservation Month: Programs, Plaques and Awards</p> |
| | <p>+20%</p> <p>+\$100,000</p> <p>Contract as needed</p> | <p>+20%</p> <p>+\$100,000</p> <p>Contract as needed +1 FTE</p> | <p>+20%</p> <p>+\$100,000</p> <p>Contract as needed</p> |

Getting There, Together: Roles and Resources Summary

Whale Staff

Current Staff Size (2024): 2 Full Time

Executive Director: Erin Miranda

General Manager: Diane Brodeur

- Ensure WHALE is staffed to match an aggressive but achievable agenda.
- Anticipate need for additional full time staff person / FTE Equivalent: 2025. Job description to be written following completion of the strategic plan.
- Each committee will be asked to identify new opportunities for **volunteers** to play a role in achieving goals.
- WHALE staff is actively identifying opportunities and funding sources to support **internships** within the organization. As staff grows, the internship program could also grow.

Recommended software investments:

- Quickbooks for Non-profits (cloud-based)
 - migration and configuration / report set up may require technical assistance (accounting services)
- Adobe Creative Suite, non-profit pricing

Board of Directors

- Immediate task following completion of the strategic plan: review skills needed and ensure the organization is recruiting board members with pertinent skills who reflect the New Bedford Community
- Hold an open call for applications
- Revitalize committee involvement
- Grow confidence as fundraising leaders through fundraising discussions and trainings

Committees

At WHALE, each board member serves on at least one committee; other committee members are drawn from general membership. Based upon the goals and

principles outlined, additional roles have been added in italics:

1) Board Development & Governance

Current Chair, Lee Blake

- Ensures that board and committee representation is consistent with WHALE's goals and reflects the community.

2) Finance Committee

Chair: Colleen Trahan, Treasurer

- Reviews and monitors the finances of the corporation.
- Alerts the organization about ways to establish and maintain fiscal strength.

3) Projects Committee

Current Chair: Ramon Silva, Board Member

- Guides the project selection process.
- Manages the real estate of WHALE.

4) Community Outreach & Membership

Chair: Pat Thornton, Board Member

- Makes community aware of WHALE through storytelling and communications
- *Drive partnership-building and engagement*
- *Work with partners, including neighborhood-based organizations, to produce events and educational activities.*

5) Fundraising & Events Committee

Chair: TBD

- Secure funds to support WHALE operations
- Develops fundraising plan, inclusive of training for board and staff (new)
- Oversees fundraising events and programs
- Interfaces with O&M Committee on membership goals.
- Supports staff on grant applications

6) Executive Committee

- Consists of all WHALE Officers
- Meets ad hoc

Programs & Education:

- Shared across committees
- Possibly to be broken out as a separate committee in the future.

Upon acceptance of the plan, staff will review the work plan with each committee and help identify new committee members.

Social Media:

Instagram: 1,464 followers
 Facebook: 2,700 followers
 Newsletter Distribution: 1481

Members

WHALE is proud to be supported by more than X members. This strategic plan outlines a number of paths for growing that membership.

Partners in Preservation

Partners in Preservation are members who support WHALE’s historic preservation projects, programs, and events at the highest level.

Thank you to WHALE’s Partners in Preservation:

(list to be added here)

| Major Projects List | |
|---|---|
| Information current as of June 2024: | |
| Current Active | WHALE’s role |
| First Baptist Church adaptive use: Steeple Plahouse | Co-owner and Project Leader. Transfer of Occupancy to Your Theatre, Inc: May 2024 |
| Strand Theatre adaptive use: Cape Verdean Cultural Center | Project Partner / Preservation services & tax credit work |
| Hillman Firehouse adaptive use: mixed income housing | Joint Venture |
| Places That Matter - Greenprint Mapping Project | Project Partner, with Trust for Public Land (grant funded) |
| Zeiterion Theatre - Renovation / Historic Rehabilitation | Tax Credit Consultant (income-generating) |
| La France Hospitality | Tax Credit Consultant (income-generating) |
| Real Estate Assets | |
| 141 Union Street | Landlord (income-generating) |

Implementing the Plan

Managing Projects and Measuring Progress

This strategic plan is intended to be adaptable and manageable. The action steps and year-based work plan should be thought of as scheduling and communication tools.

Individual goals as well as the comprehensive work plan can be placed into a Gantt chart format, assigning personnel and financial resources to each element. This should make it relatively simple to provide updates on progress (including actual time vs. anticipated time) via the “dash boarding” concept outlined, in turn facilitating information sharing with members, partners and the community at large.

It is inevitable that unanticipated challenges and opportunities will emerge within the planning time frame. Keep the big picture in mind. So long as lines of communication are strong, WHALE and its partners should be able to find creative ways to respond.

Recommended tactics:

- Ensure ownership: assign each committee to lead planning and monitor progress on individual goals (though actions may be jointly led or require the involvement of multiple committees).
- Ensure any anticipated/possible partners understand the plan intentions and are committed to their roles.
- Publicly celebrate partner contributions. Also ask partners to communicate to the broader community WHALE’s role as a collaborator.
- Ensure the plan is properly resourced with personnel and financial support. It

may be necessary to delay some actions currently scheduled for year 1 or year 2 until staff is expanded. Activities such as membership campaigns and member management, as well as legacy fund advancement, partnership development and neighborhood engagement will all require significant “high touch” personnel time to be successful.

- Conversely, with the right partners involved, some actions may be able to ramp up and achieve a quick win sooner than anticipated.
- Make metrics and milestones, some of which are now generalized, as clear as possible as part of plan implementation and project management.
- Identify and celebrate any and all quick wins. Acknowledge all contributors and teamwork.
- Update dashboard information for review at each monthly board meeting. Discuss progress quarterly, if not more often.
- If need be, refine goal statements and actions to respond to evolving conditions.
- Share updates on progress via social media, newsletters, annual reports and other communication. When possible let different individuals speak directly about their project involvement and their sense of project impacts.
- Take time to pause and reflect what the organization and its partners are learning along the way. Strategic plan implementation requires endurance. Be confident that by working together steadily, you can achieve extraordinary things!

Acknowledgments

Zapalac Advisors and WHALE would like to thank the following individuals and organizations for their involvement in the Strategic Planning Process:

WHALE Board of Directors

President

Diana Henry

Vice President

Jeremy Dagold

2nd Vice President

Lee Blake

Treasurer

Colleen Trahan

Assistant Treasurer

Danielle Poyant

Secretary & Clerk

June Goguen

Asst. Secretary & Clerk

Peter J. Hawes

Andrew Burnes

Melissa Costa

Michael J. Murray

Corey Pacheco

Laura Parrish

Carl Silva

Ramon Silva

Patricia Thornton

Dave Wyzenbeek

WHALE Presidents' Council

Chair

Tony Souza

Arthur Bennett

John Bullard

Paul Downey

Peter J. Hawes

Lyn Keith

Tenney Lantz

Michael J. Murray

Daniel Perry

Anthony Sapienza

David Slutz

The WHALE Strategic Planning Committee:

Diane Brodeur

Diana Henry

Erin Miranda

Colleen Trahan

If not already named above, for their participation in interviews, and / or their strategic planning retreat:

- Jan Baptist, title, Cape Verdean Association
- Jen Smith, Superintendent, NBNWHP
- Jan da Silva, Program Manager for Visitor Experience & Community Engagement, NBNWHP
- Rufai Shardow, Park Guide, NBNWHP
- Rebecca Barnes, Architect and Interium Executive Director for WHALE
- Ethiel Garlington, Executive Director, 1772 Foundation
- Jeff Gonyeau, Preservation Massachusetts
- Steve Connaulty, Paul & Dixon Insurance / Partner in Preservation
- Anne Louro, Preservation Planner and Assistant City Planner, City of New Bedford
- Margo Saulnier, Direct, Creative Strategies | Arts-Based Initiatives, NBEDC
- Derek Santos, Executive Director, NBEDC
- Josh Amaral, Director, Office of Housing and Community Development, New Bedford
- Jordan Latham, Vacant Properties Manager, Office of Housing and Community Development, New Bedford



How You Can Help

WHALE is always open to discussing partnerships! Please reach out to our staff or board members to start or renew a conversation.

- Join us for free programs at AHA! nights.
- Become a member. Membership starts at \$35/year.
- Become a business sponsor, starting at \$100/year.
- Donate as a partner in preservation or the legacy fund. Take advantage of the Massachusetts Community Investment Tax Credit, which provides a 50% state tax credit for donations of \$1,000 or more.

For more information, please contact:

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