



W H A L E

Waterfront Historic Area League

**STRATEGIC PLAN:
2025–2029**

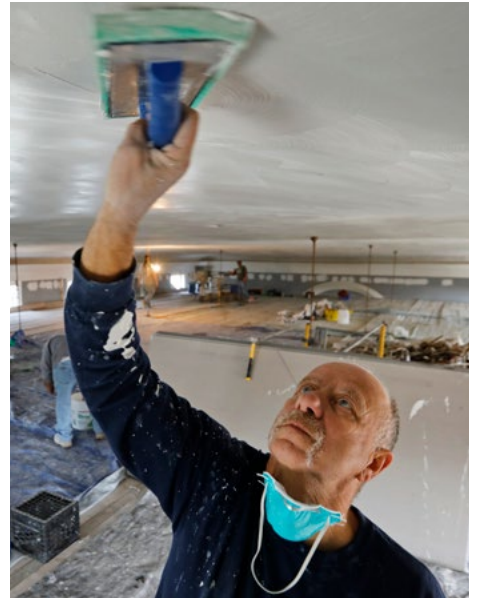
The next chapter in
a tale of ordinary people
who do extraordinary things.

NEW BEDFORD, MASSACHUSETTS

With underwriting from:



JUNE 2024



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.

Planning for the future inevitably involves a certain amount of looking back at the past. Many of us know the story of WHALE’s founding and emergence as a response to the disinvestment in New Bedford’s downtown core and the looming threat of Urban Renewal. The seed that was planted then would grow into a remarkable story of preservation, partnership, creativity, resilience, and sheer dedication to community.

Planned or not, WHALE’s activities and projects put the organization at the forefront of historic preservation, community development, adaptive use, and public-private partnerships. WHALE’s impact over the years has been due in large part to its ability to partner, to lead, and to show what is possible. As we embarked on this strategic planning process it was with the mindset of building on our past to chart a path forward that is focused on partnership, community, and engagement for the future of New Bedford. The New Bedford of 2024 does not look like the New Bedford of 1962, 1972, or even 2002. WHALE’s role in over 75 projects has helped craft the landscape that people see when they travel through the city.

This plan marks a new chapter for WHALE. Our roles in New Bedford and the region is needed more than ever. There are major changes, issues, and initiatives upon us now and ahead. How can we be a better leader, educator, connector, and advocate for preservation and for New Bedford? How can we maximize our impact while sustainably growing for the future? How can we partner with others to strengthen our collective efforts for the city and its people?

This plan is aspirational and daunting, as all good plans should be. As an organization in service to the New Bedford community, we hope that residents and partners alike can see themselves in our goals, our mission, and our work. WHALE revolves around people—those who live, work, and engage with the places WHALE restores, revives and touches. Together, we can ensure New Bedford will never be “just anywhere.”

With best regards,

Diana Henry
Board President

Erin Miranda
Executive Director

Executive Summary

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.

Our members, partners and supporters believe that by preserving New Bedford's historic architecture and adapting old buildings to new uses, we can:

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

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.

To do this work, WHALE utilizes tools including its revolving loan fund and grants to engage in real estate transactions such as the purchase, rehabilitation, and sale of properties. WHALE also serves as a preservation resource and consultant to other projects. Working with partner organizations, WHALE delivers educational programs to grow the preservation community and advocates for thoughtful policy around preservation issues.

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.

Similar to other non-profit membership-based organizations, the COVID pandemic impacted both our ability to carry out physical work and in-person programs, limiting our ability to bring members together in the real world.

From January to May of 2024, we embarked on a planning process, led by a strategic planning committee, including 20 interviews with members and partners, and an all day planning retreat. We then invited the public to provide feedback on a draft version of the plan.

One of the key objectives this process identified 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.

As we look forward to the next five years (2025–2029), our approach will be guided by the following principles:



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.

This plan outlines twelve interrelated goals across five priority areas. For each goal, a list of key actions is identified, together with information on potential partners and their roles, WHALE’s role, and milestones / metrics. We look forward to working with you as a partner in achieving these, firmly believing that together we can do extraordinary things.

Priority Areas and Related Goals

Project Impact and Data Management:

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

Project Selection:

- 2 Update project selection criteria and process.

Skill-building and Workforce Development:

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

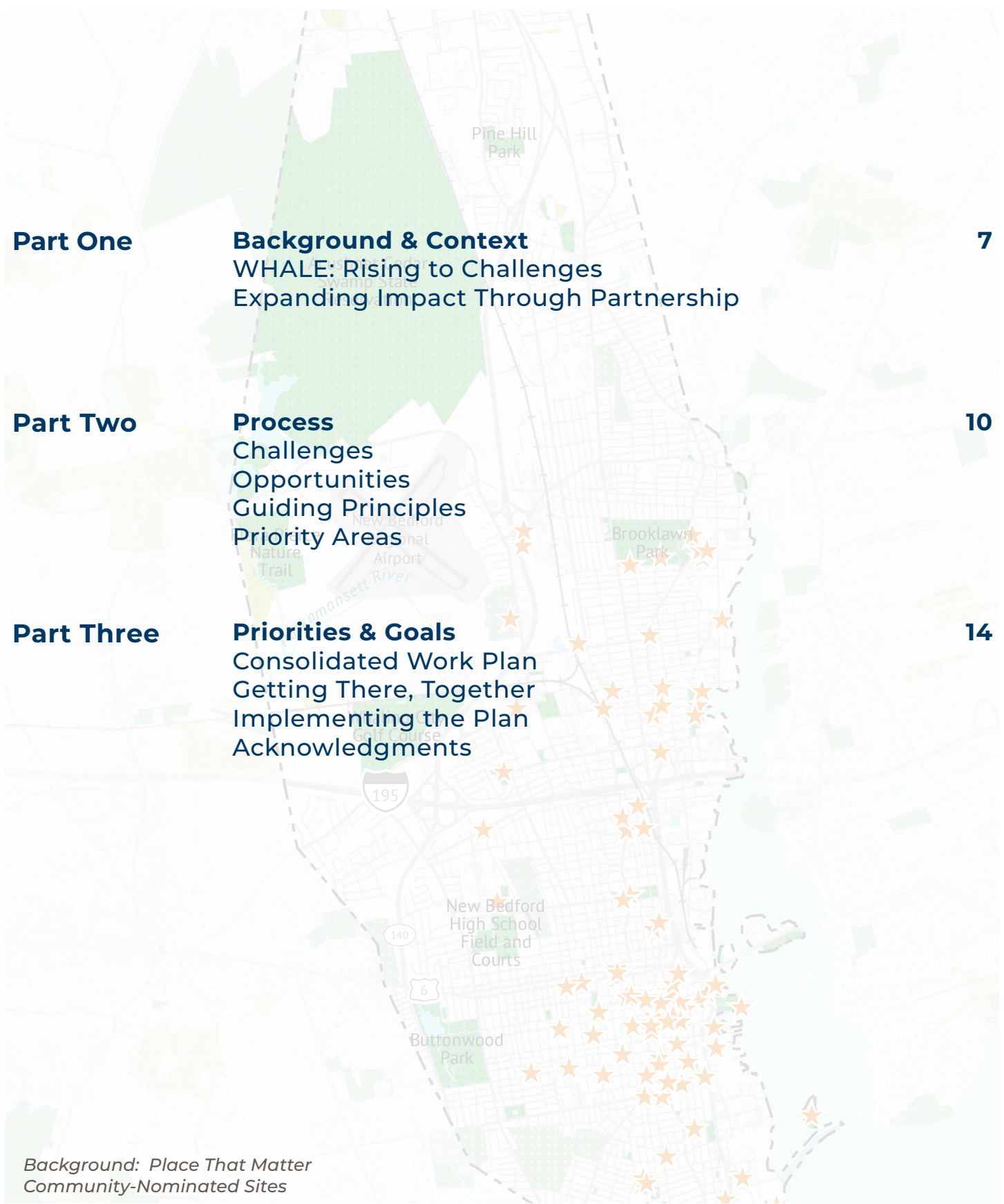
Institutional Sustainability:

- 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 relationships with community funders and expand utilization of the revolving loan fund.
- 9 Update accounting software and create a visual dashboard to track key metrics.

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.

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*Background: Place That Matter
Community-Nominated Sites*

A person wearing a white protective suit and cap is working on a blue shingled wall. They are positioned on a blue lift or scaffolding. The background is a wall of blue shingles, some of which are being removed or replaced. The overall scene is overlaid with a blue tint.

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.

Whale's Mission and the Big "Whys"

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.

Our members, partners and supporters believe that by preserving New Bedford's historic architecture and adapting old buildings to new uses, we can:

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

How do we do what we do?

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.

To do this work, WHALE utilizes tools including its revolving loan fund and grants to engage in real estate transactions such as the purchase, rehabilitation, and sale of properties. WHALE also serves as a preservation resource and consultant to other projects. Working with partner organizations, WHALE delivers educational programs to grow the preservation community and advocates for thoughtful policy around preservation issues.

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.

From the relocation and restoration of numerous buildings that now make up the heart of New Bedford Whaling National Historical Park, to the initial restoration of the Zeiterion Theatre in the 1980s, WHALE has played an instrumental 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. These efforts speak 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 strives to be a partnership-driven organization.

Each WHALE project has been taken on in collaboration with active partners within the New Bedford community, along with the support of the City of New Bedford and sometimes other partners such as MassDevelopment, and 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, limiting 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 so that we can understand the needs of residents in a granular way. This includes finding creative ways to



Many hands make light work at the Howland House, 38 South First Street.

- expand WHALE’s language capabilities so that we can be effective in reaching and communicating with residents and partners.
2. Building relationships with the real estate and economic 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 educational resource, 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 its story while creating 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

SHOULD BE ONGOING? HOW TO FIT TO TIME/STAFF/RESOURCES?

<p>(1) Understand past project impacts & Advance data management</p>	<p>Develop evaluation criteria for past projects</p>	<p>Conducting interviews to help identify criteria by taking on new</p>	<p>GIS mapping of past projects 2014 - 2028</p>	<p>→</p>
<p>(2) Update project selection criteria Identify all possible roles WHALE can play Support existing projects</p>	<p>2025 Create select process</p>	<p>2026-2029 Public Engagement Strategy 10: project Selection</p>	<p>"If you want to be incrementally better: Be competitive. If you want to be exponentially better: Be cooperative."</p>	
<p>(3) Build preservation knowledge & skills, including by supporting workforce development</p>	<p>2025 Build knowledge base of preservation skills in the community</p>	<p>Historic Happy Hours! Social Engagement through learning abouts preservation</p>	<p>Develop Pres. Curriculum w/ schools Partner w/ vocational schools to create trades school pipeline to work</p>	

Author Unknown

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 itself. It is the process that drives not only the creation of the plan document, but also the community's willingness to serve as "stewards" of the plan, using it as a living document, open to evolution, rather than a static reference.

To kick off the planning process, the Strategic Planning Committee, together with more than 20 WHALE board members and community partners were interviewed, sharing numerous ideas about how to advance WHALE's work. 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.) The participants then worked together to arrive at 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 may 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 Board of Directors.

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 relationships with the community
- Community involvement

Conversations and Synthesis, Continued

- WHALE's image in neighborhoods
- Financial stability / uncertain funding / sustainable funding to allow staff time on projects
- 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 and staffing capacity
- 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, with its investment in the *Places That Matter* initiative, 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.

Roles

As part of the retreat conversation, participants identified roles they are excited to play (discussed as "hats they are excited to wear") in order to address challenges and opportunities. Roles include:

- Support meetings with potential donors.
- Provide technical expertise.
- Lead WHALE / be a leader.
- Be recognized as leading a preservation organization.
- Be creative / 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 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 advancement 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 refined 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

This plan outlines twelve interrelated goals across the five priority areas identified. For each goal a list of key actions is identified, together with information on potential partners and their roles, WHALE’s role, and milestones / metrics. A multiple year visual work plan follows and includes annual targets for membership growth, legacy fund growth, and staffing.

Priority Areas and Related Goals

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- 3 Broaden who is engaged in preservation.
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Institutional Sustainability:

- 5 Revitalize membership and recruit more members for committees.
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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 Publications • Massachusetts Historical Commission • Funding partners • Elected officials 	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.	<ul style="list-style-type: none"> • National Park Service volunteers 	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.

Whys:

- To ensure a project is welcomed by the neighborhood in which it is located.
- 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: <ul style="list-style-type: none"> • Engage them to understand their criteria and process 	<ul style="list-style-type: none"> • Staff and members help to identify participants 	
2) Develop criteria	Community / neighborhood organizations: <ul style="list-style-type: none"> • Ask them to help contribute to project evaluations 	<ul style="list-style-type: none"> • Projects Committee drafts criteria and solicits feedback • Looks for ways to support housing strategies identified in the reports, <i>Building New Bedford</i> (City of New Bedford, 2023) and <i>Housing for All</i> (NBEDC Regeneration Project, 2024) 	<ul style="list-style-type: none"> • Community / neighborhood buy-in • WHALE builds credibility and is seen as a partner
3) Develop a decision-tree with all possible roles identified to assist with deciding what, if any, role WHALE should play on a project and what resources it may tap into.	Community / neighborhood organizations: <ul style="list-style-type: none"> • Ask them to help contribute to project evaluations 	<ul style="list-style-type: none"> • Projects Committee drafts decision tree and solicits feedback • Staff shares information on WHALE's website and through programs, to make inquiry process more efficient 	<ul style="list-style-type: none"> • 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		<ul style="list-style-type: none"> • All Committees review preliminary proforma information / budgets against available resources 	<ul style="list-style-type: none"> • Projects completed in a timely manner and on budget
5) Review the criteria annually and evolve as needed		<ul style="list-style-type: none"> • Consultant / technical specialist 	<ul style="list-style-type: none"> • 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 (over time) 	<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
4) Talk about preservation through the lens of sustainability and climate change	<ul style="list-style-type: none"> • National Park 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
5) 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, encompassing 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 	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 University • 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, potentially, 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 • <i>History Above Water</i> Conference Program (as one option) 	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"> • Have a sound staffing plan 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 (CITC)</p>	<ul style="list-style-type: none"> • Commonwealth of Massachusetts • Local 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 the Community Development Block Grant (CDBG) program • New Bedford Economic Development Council (NBEDC) • SouthCoast Community Foundation (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 enable WHALE to explore the formation of an endowment in the future through which operating costs (or a portion thereof) can be supported.

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 relationships 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		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 software and create a visual dashboard to track key metrics.

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
1) Migrate accounting to a cloud-based version of Quickbooks	<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 	Migration complete and reports set up by Q1 2025
2) Establish individual project accounts	<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
3) Set up a "dashboard" of key metrics to measure strategic plan progress and to provide a comprehensive view of individual project budgets and progress.	N/A	<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 the 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
<p>1) Tell stories of individual and cumulative impacts (buildings saved, project successes)</p>	<ul style="list-style-type: none"> • New Bedford Creative: media list • New Bedford Whaling National Historical Park: • Exhibits and public programs 	<p>Community Outreach & membership Committee + Staff:</p> <ul style="list-style-type: none"> • Communications Plan 	
<p>2) Use database information to advance storytelling and knowledge sharing</p>	<p>New Bedford creative community</p>	<p>Staff + Volunteers:</p> <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
<p>3) Invite New Bedford Creatives to utilize WHALE legacy content (8 track tapes, VCR etc.)</p>	<ul style="list-style-type: none"> • New Bedford Creative Consortium • New Bedford filmmakers • Spinner Publications 	<p>Community Outreach & Membership Committee + Staff:</p> <ul style="list-style-type: none"> • Provide access to content 	
<p>4) Explore program partnership with Cable TV and/or release content on YouTube</p>		<p>Community Outreach & Membership Committee + Staff:</p> <ul style="list-style-type: none"> • Provide access to content and/or upload 	
<p>5) Target programming for Chronicle</p>		<p>Community Outreach & Membership Committee + Staff:</p> <ul style="list-style-type: none"> • Communications Plan 	
<p>6) Co-produce a film about WHALE that lands on PBS</p>	<ul style="list-style-type: none"> • New Bedford filmmakers 	<p>Community Outreach & Membership Committee + Staff:</p> <ul style="list-style-type: none"> • Communications Plan 	

Goal #11: Develop user-friendly preservation technical resources 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
<p>Housing: 1) Create a Handbook for Homeowners of Historic Homes</p>	<ul style="list-style-type: none"> • City Departments • Local banks • Local trade organizations • Realtors • New Bedford Creatives (help with visuals) • New Bedford Whaling National Historical Park 	<p>Staff plus all committees:</p> <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
<p>Housing: 2) Expand educational workshops program</p>	<ul style="list-style-type: none"> • Rotch-Jones-Duff House & Garden Museum • New Bedford Whaling National Historical Park 	<p>Staff and Members:</p> <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
<p>Small Businesses: 3) Create a small business resource guide</p>	<ul style="list-style-type: none"> • City of New Bedford • NBEDC • New Bedford Creatives (help with visuals) 	<p>Staff plus all committees:</p> <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
<p>Small Businesses: 4) Develop a site visit program to feature facade improvements, etc.</p>	<ul style="list-style-type: none"> • TDI partners • Neighborhood organizations 	<p>Staff plus all committees</p>	<ul style="list-style-type: none"> • Content is available in print, on WHALE’s website, and reviewed in workshops • New content is added periodically
<p>Development Opportunities: 5) Create annual map-based list of preservation opportunities</p>	<ul style="list-style-type: none"> • City Departments • NBEDC • MassDevelopment/TDI 	<p>Staff + Projects Committee:</p> <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
<p>Development Opportunities: 6) Co-host developer tours in New Bedford</p>	<ul style="list-style-type: none"> • NBEDC • MassDevelopment/TDI 	<p>Staff + Projects Committee</p>	<ul style="list-style-type: none"> • Start in 2025
<p>7) Reach out to Community Preservation Act newbies to educate on where they can go for funding projects</p>	<p>New Bedford Historical Society</p>	<p>Staff + Community Outreach & Membership Committee</p>	<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 • New Bedford Whaling National Historical Park 	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 	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 	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 (as 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 & board 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>Revolving Loan Fund: Program Development</p>	
	<p>Manage partnerships</p>		
	<p>Manage membership campaign</p>		
	<p>Manage volunteers</p>		
		<p>Manage Legacy Fund campaign (to \$1 million)</p>	
	<p>Small Biz Resource Guide & Site Visit Program</p>	<p>Start conference planning</p>	<p>Host conference</p>
	<p>Explore New Bedford, Chronicle, etc.</p>	<p>PBS / Feature Doc Film</p>	
	<p>Developers' Tour</p>	<p>Developers' Tour</p>	<p>Developers' Tour</p>
	<p>May Preservation Month: Programs, Plaques and Awards</p>	<p>May Preservation Month: Programs, Plaques and Awards</p>	<p>May Preservation Month: Programs, Plaques and Awards</p>
	<p>+20%</p>	<p>+20%</p>	<p>+20%</p>
	<p>+\$100,000</p>	<p>+\$100,000</p>	<p>+\$100,000</p>
	<p>Contract as needed</p>	<p>Contract as needed +1 FTE</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 at least one additional full-time staff person by 2025.
- 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 are noted 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

Supporters / Members

WHALE has 860 donors in its database, including 289 current supporters. This plan outlines a number of paths for growing and activating this support base.

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 current Partners in Preservation:

- BankFive*
- BayCoast Bank*
- Bristol County Savings Bank*
- Andrew and Amy Burnes*
- CBIZ MHM, LLC*
- Diana Henry Realty*
- Robert and June Goguen*
- Mary Ellen Hawes Lees*
- Peter J. Hawes*
- Timothy Morgado*
- One Circle Co.*
- Corey Pacheco and Elizabeth Kalife*
- Paul & Dixon Insurance*
- Paul Choquette & Company*
- Paul and Ingrid Pawlowski*
- Danielle N. Poyant*
- R. P. Valois & Company, Inc.*
- Robert S. Dorfman Company, Inc.*
- Rockland Trust*
- South Coast Improvement Co.*
- Antone and Elsie Souza*
- Taunton Federal Credit Union*
- Turowski2 Architecture, Inc.*
- Marge Waite and Neal Weiss*

Major Projects as of June 2024:	
Current Active	WHALE’s role
First Baptist Church adaptive use: Steeple Playhouse	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 project management schema (such as 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 “dashboarding” 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 advance 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 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, Vice President, Cape Verdean Association
- Jen Smith, Superintendent, NBWNHP
- Jan da Silva, Program Manager for Visitor Experience & Community Engagement, NBWNHP
- Rufai Shardow, Park Guide, NBWNHP
- Rebecca Barnes, Architect and Interim Executive Director for WHALE
- Ethiel Garlington, Executive Director, 1772 Foundation
- Jeff Gonyeau, Preservation Consultant / 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:

15 Johnny Cake Hill
New Bedford, MA 02740
508-997-1776
info@waterfrontleague.org
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