



WHALE

Community Investment Plan 2024-2026

Revitalizing New Bedford through Historic Restoration



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Executive Summary

WHALE is a mature nonprofit organization that has an impressive 62-year track record of accomplishment in historic restoration work that has truly changed the low to moderate income neighborhoods of New Bedford. Our programs and projects encourage residents, organizations and businesses to engage in historic restoration work that impacts the social, cultural, and economic development of the city.

Vision

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

Mission

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

WHALE accomplishes its mission through:

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

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



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

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

Until the certification of WHALE as a Community Development Corporation (CDC), there were no New Bedford based CDC's engaged in real estate development that address the pressures that our historic neighborhoods feel from neglect and abandonment of historic properties. As a CDC, WHALE is engaging and facilitating historic projects that truly impact the community and economic development of New Bedford's neighborhoods. This Community Investment Plan (CIP) summarizes WHALE's overall historic restoration and community development approach for New Bedford that will benefit our constituencies for 2024 - 2026.

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

WHALE was founded in 1962 during a time in our nation's history when city centers were in decline and their buildings decaying. The Federal Government's solution was Urban Renewal, a program of demolition and clearance of blighted areas to make way for new construction they hoped would follow. The founders of WHALE saw in the city's deteriorated waterfront area quality structures built during the city's whaling and textile manufacturing heyday...the bones of a thriving city and the embodiments of New Bedford's rich and diverse heritage. They worked to save them by utilizing the first pool of donations they pulled together, in essence, WHALE's first Revolving Loan Fund. They acquired buildings, renovated and repurposed them. They rescued houses slated for demolition, moving them to fill in vacant lots in the district and selling them to new stewards. They also saved properties that now rank among the city's most popular cultural treasures: the 1834 Rotch-Jones-Duff House and the Zeiterion Theatre.

Today, the rescue and transformation of New Bedford's historic waterfront area and downtown is nationally recognized. The downtown, once in deep decay, is now home to an array of historic and cultural attractions, a university, diverse retail operations and eateries, office workers and, in recent

years, hundreds of new residents who have chosen to live downtown. Although downtown still remains a low-moderate income neighborhood, it is contributing mightily to the city's economy and vitality.

For 62 years, WHALE has made a difference in the revitalization of this Gateway City. WHALE has rescued over 70 historic properties, inspiring pride in residents and helping to transform New Bedford for the better. The projects have had a major impact on New Bedford's economy.



Section 1: Community or Constituencies to be Served by the Organization

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

The City of New Bedford is seen by its residents as a wonderfully diverse and culturally rich community with a proud past, present, and future. As the whaling capital of the world in the 19th century, "the city that lit the world" has evolved to become the home of many major industries, including one of the most important commercial fishing ports in the country and an emerging wind energy industry. The city prides itself on its working waterfront, historic district, and cultural assets as well as its expanding retail and tourist trades.

While it is a city of just over 100,000 people, New Bedford maintains a close-knit community feel. Recently named one of the top ten "Green Cities" in the country, New Bedford has beautiful parks and beaches. New Bedford is also enhanced with festivals and celebrations throughout the year and is enjoying an upswing in tourism.

Demographics

According to the 2020 U.S. Census, New Bedford has a population of 101,079, however the 2022 estimate denotes a population of 100,620, making it the 9th largest city in the state. Overall, there is an approximate increase in population by 5%. The 2022 American Community Survey (and as reported by the US Census Bureau) has 20.9% of households at or below the poverty level compared to 10.4% in the state. The same report has the median value of owner-occupied housing units at \$291,300 compared to \$483,900 state-wide. The unemployment rate in New Bedford is approximately 4.7%, according to the U.S. Bureau of Labor Statistics (for December 2023).

The median household income in New Bedford is \$53,024 as compared to \$94,488 in MA. Rents in the city are lower than surrounding cities; the 2023 HOME Program Fair Market Rent (FMR) for a 2-bedroom in New Bedford is \$1,282, while Boston's FMR 2-Bedroom is \$2,635, and Fall River/Providence is \$1,409. The rents, however, correspond to the lower household income in New Bedford.

Geography

Located in Southeastern Massachusetts, New Bedford is 20.07 square miles. It is bordered by Dartmouth to the west, Freetown to the north, Acushnet and Fairhaven to the east and Buzzards Bay on the south. New Bedford is 54 miles south of Boston, 33 miles southeast of Providence, RI, and about 208 miles from New York City.

Downtown New Bedford is home to Bristol Community College's New Bedford campus, housed in two buildings and concentrating in the Health Sciences. The increase in students in the downtown area is creating more of a need for increased affordable housing for this constituency.

Economy

Port of New Bedford is America's #1 fishing port. The port is a significant part of the region's economy and cultural identity. Unlike many waterfront communities that have lost their working waterfront to development, New Bedford remains a working harbor, employing many low-income residents. Continued support and preservation of the working waterfront requires a citizenry that understands its essential value. WHALE's project history has enhanced and added value to New Bedford's proud community identity as the whaling capital of the world and now the fishing capital of the nation.

The Port of New Bedford is home to the New Bedford Marine Commerce Terminal – the first purpose-built terminal for offshore wind in America. From the Port of New Bedford, Vineyard Wind, America's first offshore wind farm, was launched. The project has already begun to supply power to homes and business, providing enough clean, renewable energy that reduces carbon emissions by over 1.6 million tons annually. This new industry has already made a tremendous impact in terms of job creation and attracting new workers to the city.

New Bedford is a multi-ethnic and multicultural city with a high proportion of foreign-born residents. Thirty-eight percent of residents over the age of 5 years old speak a language other than English at home, compared to 25% in the entire state. 23% of the population of New Bedford consider themselves Hispanic or Latino. 15.8% percent of the population is 65 years or older, and nearly 7% of residents are under 5 years old. There are 3,465 civilian veterans in New Bedford.

New Bedford is a city of primarily low-moderate income neighborhoods, each with its own character, and housing options ranging from a single-family home on the beach to a historic triple-decker to an artists' studio. Of the 39,059 occupied housing units in the city, 40% owners and 60% renters. 33% of units are single family homes, 46% are in structures 2–4-unit structures and 21% in 5+ unit structures.

The economy of New Bedford is also diverse. The deep-water port is still an important industry, with scallops being one important crop. Offshore wind energy, trade, manufacturing, government, and

services are also key industries in the city. In 2021 a reported 3.1% growth in median family income was reported, at \$50,821.

Section 2: Involvement of Community Residents and Stakeholders

CIP Plan Development: The elements of this Community Investment Plan (CIP) will be reviewed by the 16-member WHALE Board of Directors and voted for approval at their February 2024 Board Meeting. The CIP will be submitted to the City of New Bedford Office of Housing & Community Development as well as the Mayor's office.

WHALE's Community Investment Plan comes at the beginning of an intensive strategic planning initiative. Commencing in January 2024, this new effort will involve both quantitative and qualitative analysis of our past projects, determine needs and opportunities for WHALE to play a variety of roles in community focused development, find opportunities for expanded collaboration and build on the success of the past to deepen our impact and service to residents and constituents. This process will include opportunities for direct community input, including interviews, surveys and direct solicitation of suggestions, insights, and feedback on our past work and how WHALE can improve on a variety of fronts in the future. The plan is scheduled to be completed and presented at WHALE's annual meeting in June 2024.

WHALE also drew on the wisdom of leaders in the community and experts in historic preservation and neighborhood revitalization, including the New Bedford Economic Development Corporation, non-profit partners, representatives of city agencies and departments, and leaders of neighborhood associations.

Ongoing Community Outreach and Involvement: The Waterfront Historic Area League engages with residents and businesses in all of our governance, planning, programming, and community outreach, including:

- **Board and Committee Leadership:** The Waterfront Historic Area League's Board of Directors is the governing body of the organization. The Board meets every month, with committee meetings held on a monthly or as required basis. Our Board includes New Bedford residents (many from the downtown neighborhood target areas), business owners, community leaders, historic preservation experts, and representatives of other nonprofit and for profit organizations serving New Bedford.
- **Real Estate Development:** All of the Waterfront Historic Area League's affordable housing, commercial and mixed-use historic preservation development projects are initiated by, and approved by, our representative Board of Directors. We also work in close relationship with the City of New Bedford's Office of Housing and Community Development and the Mayor's office to ensure that our development initiatives support and complement the City of New Bedford's overall economic development and revitalization goals and strategies.
- **Historic Preservation Education and Advocacy Programming:** WHALE provides programs and education workshops for all ages on the history and culture of New Bedford. WHALE

also provides historic preservation consulting, such as workshops in window repair for historic houses and historic paint color analysis and other helpful resources and information for low to moderate income homeowners. WHALE advocates for historic preservation in neighborhoods and at a city-wide level. For example, we monitor demolition permit proposals of historic homes and advocate that City Council impose a delay if the threatened demolition would cause deterioration of the historic integrity of a neighborhood.

- **Community Outreach and Marketing:** The Waterfront Historic Area League maintains an informational website, www.waterfrontleague.org, on which all our projects and programs are described. All of WHALE's community programs are publicized via community E-News, through the local newspapers, social media including web, Facebook and Instagram, and posters displayed throughout the city.
- **Community Engagement with Local Stakeholders:** Community engagement and input is central to our work. WHALE reaches out to many of New Bedford's key advocates and stakeholders at the neighborhood and organizational levels. The addition of our Community Outreach Coordinator in 2022 allowed the organization to broaden our reach and awareness about the community and service driven work WHALE does for the city. This dialogue has helped to inform our processes and strategic approach to programs, projects and making our work and resources more accessible to city residents.



Section 3: Goals

The goals for this Community Investment Plan are intended to align with our mission and years of experience with historic development and community-oriented work and collaboration.

1. Increase and strengthen the foundation for “Revitalization through Historic Preservation” in New Bedford.

Providing education and accessible communication about the impact and benefits of historic preservation and its related development to the city of New Bedford is an important role for WHALE to serve. It is a constant need and front and center to our mission and work as a historic development

focused CDC. There is always a need to build and cultivate the grassroots support for historic preservation, among all New Bedford residents and across all ethnic, racial, and economic backgrounds. In this way, the rich history and culture of New Bedford will be kept alive and accessible through the active reuse of its remarkable historic buildings and the stories they tell and the pride they instill in their community. Encouraging revitalization through preservation helps strengthen neighborhoods by removing blight, disinvestment and encouraging a community focused approach to invest in what already exists.

2. Increase the impact of WHALE project investments by revisioning existing program, such as the revolving loan fund and neighborhood restoration program and continuing to undertake important historic development projects.

WHALE's portfolio of projects is remarkable and their impact, both short and long-term is impressive. Yet the landscape has changed over six decades, as have the community needs, goals and resources available to make that happen. Looking at creative ways to revision our current program, through utilized more data driven project selection to creating new assistance programs through our revolving loan fund is an opportunity to increase the impact of our resources and role with a project. This will meet a need we already know exists, financial resources for existing homeowners, at especially low- and moderate-income levels. WHALE will continue to focus on undertaking historic redevelopment projects that are important in terms of significance, both historic and community focused, advance our collective mission and help meet city needs and goals related to housing, arts, culture and other community goals.

3. Be the strong voice, leader and resource for preservation and sustainable, community focused development in New Bedford.

WHALE is a nationally recognized and awarded organization and as such our position, experience and involvement with projects, advocacy, policy development and more speaks volumes. We are able to capitalize on our history and standing in the community to demonstrate what is possible through historic community development in New Bedford and raising the bar for others who are looking to invest in our city. It is incumbent upon WHALE to set a standard for what the community expects of development and resources that enhance the collective quality of life for all residents. Encouraging development that retains existing assets and is designed to focus on community needs ensures that the people who live and work in our neighborhoods can continue to call these places home and benefit from positive, community focused investment.

4. Cultivate and grow opportunities to collaborate and assist with new constituencies in the city's neighborhoods.

Through WHALE's proactive outreach and increased communication, growing and sustaining new audiences and constituencies outside of our normal base is important. This will contribute to our messaging and grassroots efforts but also strives to make our services and mission relevant and available to those who are in need. In the low to middle income areas immediately around the downtown, access to information about basic home maintenance, funding, information, etc. is critical to ensuring homeowners can keep their residences in good condition and support their ability to remain in their homes and neighborhoods. Making this information accessible, understood and

available to all is important for the neighborhoods in which we are and hope to work and make an impact for all residents.

Section 4: Activities to be Undertaken



WHALE continues to see an increase in funding and development activity around our projects. In the last five years, WHALE leveraged over \$15 M in project financing for the revitalization of New Bedford's neighborhoods. This is evidenced through our direct development and collaborative partnership projects.

First Baptist – Steeple Playhouse: Completed in November, 2023, this decade long project not only preserved an historic landmark of local, national and international significance it also removed blight, provided a home to a strong community theatre group and expanded access for the cultural and performing arts in New Bedford with increased energy and vitality to the Upper William Street neighborhood.

Strand Theatre – CVNA: WHALE continues our partnership with the Cape Verdean Association in New Bedford by providing consulting and project management support for the Strand Theater and Island Park projects. With Island Park now under construction and phase 1 of the Strand Theater set to begin in the spring, there is a tremendous amount of enthusiasm around the investment and activity on this critical part of Acushnet Avenue and providing a home to this important local cultural non-profit.

Hillman Street Firehouse – CMK: WHALE is set to undertake the restoration of the Hillman Street Firehouse in 2024, in partnership with CMK Development Partners. The rehabilitation of this highly visible property, vacant for 30 years, will provide 8 units of much needed affordable housing and shows that our current stock of buildings can be rehabilitated and reused to meet community needs, especially housing.



Recent Success – Completion

305 – 307 Pleasant Street: WHALE undertook the restoration of this multi-family property as part of the Attorney General Receivership program. The home was rehabilitated and sold to an income-qualified family with ties to the neighborhood, in collaboration with the city's First Time Homebuyer program.

Capitol Theatre: WHALE partnered with the city's other CDC, the Community Economic Development Corporation on their Capitol Theater project, a mixed use of another Acushnet Avenue theatre that will provide space for the CEDC services, housing and accessible resources for the community. WHALE concluded our services as historic preservation and development consultant in 2023. The project is now on its way to construction.

1060 Pleasant Street: WHALE, serving as historic developer with partner the Veteran's Transition House (VTH), restored this property to create 10 units of Veteran's transitional housing for the city. The

property, designed to serve 20 Veterans, includes 24/7 staff support and during the pandemic was a quarantine zone for Veterans affected by COVID-19.

WHALE's activities will fall under four categories:

1.) Direct Historic Preservation Real Estate Development

WHALE engages in direct historic preservation development, including affordable housing, commercial and arts and culturally focused projects that advance goals of economic development, historic preservation and neighborhood revitalization.

-Neighborhood Restoration Program: This program invests in the neighborhoods adjacent to the downtown through the identification, rehabilitation and transfer of historic properties that are endangered, vacant or abandoned. This program has demonstrated success with the recent rehabilitations of 305-307 and 318 Pleasant Street, which were sold to a qualified low-income, first-time homebuyer through the city's Neighborhoods First program.

-RLF Revision: WHALE has utilized a revolving loan fund in some capacity since its founding. Our current strategic planning initiatives will have a focus on revisioning our current loan program to explore opportunities to increase impact and assistance to low- and moderate-income property owners in targeted areas. Possible considerations are loan programs for exterior work, roofing, masonry work, and other maintenance that assists the property owner with keeping their historic home in good repair, allowing them to remain in their homes and a part of their communities. This programmatic revision will include a determination of existing conditions, needs, capacity, etc. and mentor with current organizations who operate similar successful programs.

-Hillman: WHALE will be undertaking the Hillman Street Firehouse project as part development partnership that will see this 30-year vacant structure under construction by spring, 2024. WHALE will bring over \$3 M in secured funding to this project that will create 8 units of much needed housing to the neighborhood while eliminating a blighted building from a prominent corner in the city. The alliance with a partner allows WHALE to capitalize on our non-profit resources, expertise with historic rehabilitation and community connections to ensure a project of high quality and extreme historic significance is successfully completed.

-OHCD Work: WHALE will continue to work in partnership with the city of New Bedford, its mayoral administration and agencies, especially the Office of Housing and Community Development. The OHCD's latest plan "Building New Bedford" prioritizes the facilitation of new housing across all income levels and making use of existing housing stock and space. WHALE has successfully collaborated with the OHCD on past projects and initiatives and will continue to do so, through direct project development, resource and information sharing and other potential roles.

-Places that Matter Data: Since 2022, WHALE and The Trust for Public Land have been creating a "greenprint", a GIS supported mapping tool that informs responsible community growth by looking at areas of cultural/historical significance, in need of/opportunities for affordable housing, at risk of climate change and in need of/opportunities for open space and parks. This powerful tool draws on data from publicly available sources, city and regional plans, as well as community informed survey information. This tool, entitled "Places that Matter" shows where resources and investment are needed,

where projects can be most impactful and where opportunities are throughout the city. This tool is intended to help guide WHALE's future projects and investment focus using this data supported approach. It will also be publicly available for use by the city administration, community residents and others looking to invest and undertake projects in the city.

2.) Collaborative Partnerships

WHALE has worked with partners since our founding in 1962 and we see the effects of those collaborations to this day. Utilizing our resources, expertise and community connections, WHALE can support our fellow non-profits and organizations who are undertaking projects of their own. This is a critical role for WHALE to fulfill, as many organizations are volunteer and do not have the capacity to undertake, manage and see a project through to successful completion. WHALE's role as a CDC and community focused mission can uplift and fulfill even more missions than our own.

-CVANB- Since 2018 WHALE has partnered with the Cape Verdean Association in New Bedford (CVANB) Inc. on the restoration of the Strand Theater and its new life as a cultural community center. WHALE brings our development, preservation, and project expertise to aid this 100% volunteer organization with this important project for the city's north end and the Acushnet Avenue corridor. This project is set to begin construction this spring and is an important milestone for the CVANB. Our resources and expertise allow them to focus on their ongoing programs and fundraising, while this new facility comes to fruition.

-The Zeiterion Theatre – WHALE is supporting this long-standing cultural institution as they undertake a multi-year and multi-million-dollar restoration of their historic downtown theatre. Affectionally known as "The Z", our involvement brings preservation and development expertise, compliance and access to information and resources as the organization focuses on fundraising as well as continuing their performances for city of New Bedford, providing important access to the performing arts to all.

3.) Education & Outreach

WHALE has been at the forefront of preservation education, outreach, and advocacy since our founding. This continues to be a critical role for our organization as we look to expand our impact, audience and awareness beyond traditional boundaries, real or imagined.

-Homeowner Resources: With the sheer amount of historic housing stock in the city, providing important information, education and resources to these homeowners and residents is essential. WHALE is currently expanding our homeowner focused resources by updating our website and hosting ask the expert series and question and answer series tailored to historic homeowners. We will also target efforts to those residents living in the focus areas of our Neighborhood Restoration Program and consult the data from our Places that Matter mapping project to see where there is the most need.

-Educational/Training Opportunities: WHALE offers educational and training opportunities, both in person and virtually and will continue to do so over the next three years. The in-person trainings have included window restoration workshops while virtual meetings have allowed the community to gain a better understanding of WHALE's programs, how we work with the community and opportunities for future collaborations. This is an important focus for WHALE's upcoming strategic planning initiative.

4.) Investment in WHALE's sustainable growth and development as an organization, CDC and accessible community resource.

-Strategic staff growth based on needs and goals: WHALE's staff has always been reflective of our work and role in the city of New Bedford. The talent we seek and bring to our organization will be a realization of our work plan – marrying preservation, project and programmatic administration and development. WHALE's growth must be sustainable as we invest in our team for the long-term benefit of the organization and community.

-Exploration of student and youth programs to cultivate and involve next generation: Engaging younger audiences, not only with our work and projects but with overall education about preservation and community focused development is essential in WHALE's next chapter. From student and school groups to younger demographics who are community focused, there are audiences and spheres of influence that WHALE can align with to elevate our neighborhoods and support our community members.

-Continue to cultivate strategic Board development and recruitment to ensure representation and active participation across demographics, skills, needs and goal-oriented work: WHALE's board reflects not only the community, but the variety of professions, skill sets, influences and voices that make up the New Bedford community. We will continue to focus on intentional and mindful board recruitment and cultivation with a goal to broaden and deepen our connections with the community.

-Develop opportunities for volunteer participation in support and enhancement of WHALE programs, projects, and community presence: It is clear that the residents of New Bedford are passionate and proud of their city. WHALE's work is intrinsically tied to sense of place and pride in the community and where people live, work, and raise their families. There should be no boundaries or exclusions from residents, especially our low and moderate income families, feeling proud of where they live, that it matters to them and is reflective of their community spirit. WHALE has a unique role through our projects, work and programs to engage with those residents as volunteers. This will expand the awareness of WHALE, and our work in preservation development while strengthening connections and continuing important channels of essential communication.

Section 5: How Success will be Measured and/or Evaluated

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

Real Estate Development Key Evaluation Measures:

Predevelopment Measures:

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

Housing Real Estate Development Measures:

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

Historic Preservation Development Measures:

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

Economic Revitalization and Community Development Measures:

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

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

- # of community partners engaged in advocacy work (quantified as existing or new)
- # of persons in the community engaged in education and advocacy projects and programs
- Outcome and tangible results in engagement process
- # of new policies or programs in place that impact success of community development and historic preservation work

WHALE staff will track and report on projects and advocacy work to the Board of Directors for annual evaluation. WHALE staff reports monthly to the Project Committee and Finance Committee and any will follow the same reporting schedule for additional committees or task forces that are established.

Section 6: Collaborative Efforts to Support Implementation

WHALE has a history of collaborating on many of its projects and programs. Following is a list of some recent and current collaborative efforts:

- First Baptist Church: reuse study, partnering with Your Theatre; secured a \$20,000 Cultural Facilities Grant and a \$10,000 National Trust for Historic Preservation grant to perform the feasibility study and obtained \$480,000 in state historic tax credits for the project.

- Trust for Public Land: WHALE has partnered with TPL since 2022 on the creation of our “green print”, Places that Matter mapping project that will identify areas of concern, opportunity and critical impact issues along four categories: historic and cultural, affordable housing, open space/parks and climate change risk.
- Strand Theater: WHALE is working with the Cape Verdean Association of New Bedford on the restoration of this historic theater for the first regional Cape Verdean Cultural Center and abutting creation of “Island Park” representing the Island immigrants of New Bedford
- Zeiterion Theater: WHAKE provides historic and development management and guidance for the theater’s restoration expansion plan and ongoing projet.
- MassDevelopment North End TDI: WHALE is a partner for the Transformative Development Initiative area focused along the Acushnet Avenue corridor in the city’s North End. We bring our resources, insight and expertise to the TDI steering committee and support ongoing program, outreach and initiatives that are designed to assist and elevate the local community, businesses and residents in this area.



As a Community Development Corporation, WHALE will increase its outreach to neighborhood-based organizations over the next two years to assist and collaborate on projects that involve the redevelopment of historic properties. WHALE can provide expertise on predevelopment work, including project feasibility studies, grant and tax credit application preparation, historic design work in collaboration with project architects, and overall real estate project management. In this way, there will be added capacity in the city to complete historic redevelopment projects.

Section 7: Integration of Activities/Consistency with Community Strategy and Vision

Planning our work, vision and how we strive to make an impact on New Bedford is not a siloed effort. As with all our CIP’s and strategic plans, we are heavily informed by the planning of the City of New Bedford and others, such as the New Bedford Whaling National Historical Park and the New Bedford Economic Development Council. The City of New Bedford is also amid an updated comprehensive planning process, but as in past plans, we know that the city emphasizes historic preservation as a guiding principle for community and economic development and education. By working closely with the Mayor’s Office, the Office of Housing and Community Development, the New Bedford Economic Development Council, and the National Park, we will ensure that our mutual goals are advanced as our successes deepen.

WHALE has a history of engagement in the overall planning and community vision for New Bedford. Historically, WHALE was instrumental in spearheading the following initiatives:

- Establishment of the Whaling National Historical Park and the National Parks Visitor Center
- Envisioning and advocating the design of the Route 18 Streetscape and Pedestrian Boulevard improvements which tie the Working Waterfront to New Bedford's Downtown
- Resurgence of Cultural Venues in Downtown New Bedford including the Zeiterion Theatre and the Rotch Jones Duff House Museum, and more recently the Seamen's Bethel and Mariners' Home, the Co-Creative Center and Steeple Playhouse.

We will continue to not only implement important historic preservation projects that impact the community development of New Bedford, but we also will engage in city-driven planning, design and policy initiatives that make New Bedford unique and "not just anywhere".

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

- New Bedford Economic Development Council
- Seaport Cultural District
- The "Downtown Squad" Committee
- MassDevelopment North End TDI
- AHA!

Section 8: Financing Strategy

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

Strategy 1: Revision and Expand WHALE Revolving Loan Fund (RLF): The RLF is funded with foundation grants (1772 Foundation), Bank Grants, and returning project funds. Currently the RLF has \$310,200 and was partially replenished from the historic tax credit proceeds on Steeple Playhouse. The organization is seeking to grow this fund and seek ways in which it can be made more accessible and impactful to property owners in the city through a revisioning process during organizational strategic planning.

Strategy 2: Expand Developer Fee and Consulting Services: Strive to develop projects that carry a sufficient amount of developer fees that can support overhead costs for the organization. WHALE will build a percentage- based developer fee into all its projects or assess a fee for service to provide developer consulting services to projects. WHALE will also look to increase our consultant service base by working with developers undertaking historic projects in the city.

Strategy 3: Strengthen and Increase Existing Private Contributions

In 2012, WHALE launched a “Partners in Preservation” program with local businesses who support the organization’s work and value the benefits that the preservation projects bring to the revitalization of New Bedford. WHALE now has over 40 Partners in this program who have contributed well over \$400,000 to the organization to support our work. With the Community Investment Tax Credit, WHALE would be able to offer an incentive for increased Partner contributions. With CITC in place, we have been able to double our Partner in Preservation contributions.

Strategy 4: Increase WHALE Influence Base

WHALE has a goal to increase its current membership to 500 over the next two years. As with many organizations, giving declined during the pandemic and we are working hard to reverse that trend by reevaluation what membership means and how to engage the base of influence we have through social media in terms of direct support to projects, programs, etc. rather than traditional membership. Benefits to supporting WHALE include receiving monthly E-News on projects and programs of WHALE and important issues to New Bedford residents. WHALE members are also a source for our volunteer base and we are actively working on ways to better engage those individuals.

Strategy 5: Capital Campaign Funding

WHALE runs capital campaigns to support important projects that require additional private investment. For example, engaged in a successful \$450,000 capital campaign to restore the First Baptist Church for the creation of Steeple Playhouse. Our ability to conduct such campaigns as a direct project investment is critical to our work.

Strategy 6: Grants and Foundation Support

From 2018 – 2023, WHALE leveraged over \$15 M in funding from grants, historic tax credits, local and state funding to do our work. In 2022, we successfully obtained over \$600,000 in direct organizational and project grants. Moving forward we aim to grow our foundation and grant funding to cover our operating budget. CITC would assist us in supplementing our operating budget so that we can ensure we have the staff expertise on hand to support our current and future projects and roles.

Strategy 7: Planned Giving Campaign

WHALE will continue to work on launching a Planned Giving Campaign. Planned Giving matters, particularly for small and mid-sized organizations, because it is a way to plan growth and strength for

WHALE. Planned gifts can be used to sustain programs, add capacity, establish endowments, or launch new initiatives.

Section 9: History, Track Record, and Sustainable Development

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

For 62 years, WHALE has made a difference in the revitalization of this Gateway City. WHALE has rescued over 70 historic properties, inspiring pride in residents and helping to transform New Bedford for the better. The projects have had a major impact on New Bedford's economy. Since 2001, WHALE's projects have contributed \$2.5 million in tax revenue to the city. Investment in New Bedford's historic properties since 2013 totaled more than \$15 million bringing 500 construction jobs and 50 permanent jobs to the city.

WHALE's work is consistent with the Commonwealth's Sustainable Development Principles in the following ways.

Concentrated Development and Mixed Uses

WHALE's real estate development projects are located in the downtown and adjacent neighborhoods making them concentrated. Many have mixed-use or cultural components. All are historic buildings, using existing infrastructure, making them sustainable. The projects are in mixed-use, transit-oriented neighborhoods. Residents can walk to banks, restaurants, grocery stores, daycares, community centers, cleaners, libraries, pharmacies, schools, and health care providers.

Advance Equity

Our projects have affordable housing components and we strive to have a "healthy mix" of units to spur economic development. WHALE follows Equal Employment Opportunities.

Make Efficient Decisions

Part of our mission is to educate residents on the importance of historic preservation to the cultural identity and livability of their neighborhoods. We strive to help people see that the history of their neighborhood's buildings are essential to the quality of life they enjoy. This education, outreach and tools assists residents in making smart and efficient decisions regarding improving their homes and being effective stewards of their property.

Protect Land and Ecosystems

Our projects have been protecting the buildings and associated land of New Bedford for decades.

Provide Transportation Choice

WHALE has been involved in the design and implementation of projects such as Route 18 that have increased pedestrian access to downtown and the working waterfront. We locate our projects in mixed-use, transit-oriented neighborhoods with pedestrian access to basic services within a half mile of the site.

Increase Job and Business Opportunities

WHALE's projects include not only affordable housing, but also commercial space and buildings that have been restored for arts and cultural uses. This array of repurposing of buildings increases job and business opportunities in downtown New Bedford and surrounding neighborhoods.

Promote Clean Energy

WHALE has installed energy efficient retrofits and green building practices into all its projects. Our work is evidence that the greenest building is the one that is already built.

Plan Regionally

WHALE has been involved in the planning for many projects that have impacted culture and tourism at the regional level, including the New Bedford Whaling National Historical Park, bringing thousands of tourists to the downtown every year.

WHALE looks forward to these next three years of growth, impact, and collaboration to benefit community of New Bedford through our historic and strategically focused community development efforts. There is a tremendous amount of opportunity, and we are ready to embark on this new chapter for our organization.

