WHALE

Community Investment Plan

Revitalizing New Bedford through Historic Restoration

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Executive Summary

WHALE is a mature nonprofit organization that has an impressive 58-year track record of accomplishment in historic restoration work that has truly changed the low to moderate income neighborhoods of New Bedford. Our programs and projects encourage residents, organizations and businesses to engage in historic restoration work that impacts the social, cultural, and economic development of New Bedford.

Vision

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

Mission

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

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

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

neighborhoods are culturally strengthened and retain their character as desirable places to live.

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

-stabilizes property values, and improves the character of the whole neighborhood;

-creates affordable and workforce housing to diversify the community's housing stock;

-strengthens the local economy and helps create jobs;

-provides a foundation for cultural and heritage tourism, fostering civic beauty and the arts;

-promotes adaptive reuse of existing buildings-the "greenest" form of a new building;

-safeguards a community's heritage;

-and protects irreplaceable places that matter to us.

Until the certification of WHALE as a Community Development Corporation (CDC), there were no New Bedford based CDC's engaged in real estate development that address the pressures that our historic neighborhoods feel from neglect and *abandonment* of historic properties. As a five-year old CDC in New Bedford, WHALE is engaging and facilitating historic projects that truly impact the community and economic development of New Bedford's neighborhoods. This Community Investment Plan (CIP) summarizes WHALE's overall historic restoration and community development approach for New Bedford that will benefit our constituencies for 2021-2023.

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

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

Today, the rescue and transformation of New Bedford's historic waterfront area and downtown is nationally recognized. The downtown, once in deep decay, is now home to a multitude of historic and

cultural attractions, two universities, a diversity of 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 58 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. Specifically, our service area is defined by New Bedford's municipal boundaries.

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

While it is a city of approximately 95,000 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 U.S. Census 2018 estimate, New Bedford has a population of 95,363, making it the 6th largest city in the state. The 2018 Census has 21.1% of households below poverty level compared to 11% in the state. The same study has the median value of owner-occupied housing units at $228,400 compared to $335,500 state-wide. The unemployment rate in New Bedford is approximately 10.5%, according to the U.S. Bureau of Labor Statistics.

The median household income in New Bedford is $43,898 as compared to $66,658 in MA. Rents in the city are lower than surrounding cities; the 2020 HOME Program Fair Market Rent (FMR) for a 2-bedroom in New Bedford is $819, while Boston's FMR 2-Bedroom is $1,454, and Fall River/Providence is $913. 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 on the west, Freetown on the North, Acushnet on 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 UMass Dartmouth's School for the Visual and Performing. Bristol Community College has a 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. The Port of New Bedford will launch the $2.6 billion Cape Wind project – America's first offshore wind farm – starting next year. The project will supply over 75% of the electric demand for Cape Cod and the Islands and will create hundreds of jobs.

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. 9,576 people in New Bedford consider themselves Hispanic or Latino. Seventeen percent of the population is 65 years or older, and almost 7% of residents are under 5 years old. There are 7,219 civilian veterans in New Bedford. Dartmouth, Acushnet, and Fairhaven.
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. The 41,511 housing units in the City are 41% owners and 51% renters. Median value of a residential unit in New Bedford is $218,000.

The economy of New Bedford is also diverse. The deep-water port is still an important industry, with scallops being one important crop. Trade, manufacturing, government, and services are also key industries in the city. In the decade of the 1990s the median family income in New Bedford has grown by 21%.

Section 2: Involvement of Community Residents and Stakeholders

CIP Plan Development: The elements of this Community Investment Plan (CIP) were reviewed by the 19-member WHALE Board of Directors and voted for approval at their October 2020 Board Meeting. Due to Covid-19, the CIP also received input virtually from neighborhood representatives. The CIP was submitted to the City of New Bedford Office of Housing & Community Development as well as the Mayor's office for input.

WHALE's Community Investment Plan comes at the heels of and is strongly guided by the results of the *2019 WHALE Strategic Plan; A Strategic Plan for 2019-2024*. During the year of 2019, the Strategic Plan process included community outreach, including a community survey, providing feedback on our past work and suggestions and insights for the future. WHALE's Board Members participated in Strategic Plan retreat in October 2019.

The Committee also drew on the wisdom of leaders in the community and experts in historic preservation and neighborhood revitalization. Further, the process included meetings and discussions with Neighborhood United members, including the Community Economic Development Center, the CDC in the North-End, and leaders of the neighborhood associations from the South End

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

- Board and Committee Leadership: The Waterfront Historic Area League's Board of Directors is the governing body of the organization. The Board meets as a whole every month, with committee meetings held on a monthly or as required basis. Our Board includes New Bedford residents (many from the downtown neighborhood target area), business owners, community leaders, historic preservation experts, and representatives of other nonprofit and 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 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 of 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: WHALE has reached out to many of New Bedford's key advocates and stakeholders. Through that engagement and input, WHALE plans to increase its organizational capacity through the addition of a fifth staff person – a community outreach coordinator – to conduct historic neighborhood planning in LMI neighborhoods throughout 2021.

Section 3: **Goals**

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

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

- Creating new jobs both in construction and permanent positions related to the reuse of the buildings

Section 4: Activities to be Undertaken

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

The Co-Creative Center, 137 Union Street

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

Expansion of Southeastern MA Veterans Transitional Housing

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

Capitol Theater, North-End Resource Hub

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

Hillman Street Firehouse

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

Leander A. Plummer House

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

318 Pleasant Street, First-Time Homebuyer Project

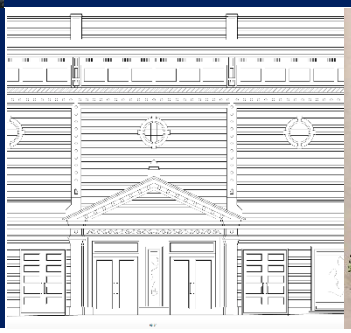
WHALE rescued this c. 1850 Greek Revival from the wrecking ball after over 40 New Bedford residents petitioned WHALE to save it. The two-family home was fully restored and sold to a qualified low-income, first-time homebuyer through the city's Neighborhoods First program.

First Baptist Church, National Treasure

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

Historic Strand Theater as Cape Verdean Cultural Center and Island Park

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



Specifically, our Community Investment Plan is designed to achieve the following objectives:

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

Communication and education about the importance of historic preservation to the city of New Bedford is continually important to emphasize. There is a need to build the grassroots support for historic preservation citywide, among all New Bedford residents, of all ethnic, racial, and economic backgrounds. In this way, the rich history and culture of New Bedford will be kept

alive by telling the story of the city's past through its remarkable historic buildings and the stories that these buildings tell in the pride of their community.

a. Create a Community Committee comprised of Board Members and Staff interested in developing achievable education and outreach programming and examining ways to make WHALE and historic restoration more accessible and diversified

b. Invite Board Members on Staff Neighborhood Walks for exposure to projects and residents' concerns

c. Establish more inclusive and cost-friendly WHALE events

d. Develop an accessible Preservation Work-shop series for historic homeowner restoration

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

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

a. Finish current projects: First Baptist Church, Capital Theater, Strand Theater, and Hillman Firehouse

b. Continue the progress of the projects committee comprised of people with expertise to expand WHALE's capacity to take direct action

c. Continue to implement and complete historic development projects in downtown New Bedford that impact quality of life of the community through arts and cultural development like the Cape Verdean Cultural Center and Steeple Playhouse

d. Continue to diversify WHALE's future projects, considering among the potential roles: acquisition and re-development, partnerships with non-profit and for-profit developers, and purchase options

e. Continue to expand WHALE's work to other neighborhoods in New Bedford

f. Continue to work with the Attorney General's office and the city to pursue

receiver properties

g. Continue to build a fee-for-service consulting capacity for historic preservation tax-credit projects

h. Continue to build WHALE's Revolving Loan Fund to use for acquisition, predevelopment costs and construction lending

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

   a. Continue to strengthen a comprehensive communications plan to convey WHALE's messages to both the general public and targeted audiences through social media

   b. Improve and keep updated the WHALE website to advance the mission and specific goals; maintain an ongoing program to keep the site fresh and drive viewers to it through monthly e-blasts and social media

   c. Continue to refresh WHALE's brand and status as a Community Development Corporation to increase accessibility and understanding of its revitalization power

   d. Build WHALE's Government Relations capacity and communicate regularly with community decision-makers re: historic preservation priorities, values, and benefits

   e. Keep on working towards a diversified and talented Board of Directors that represent the demographics of the city and that bring various areas of capacity

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

   a. STAFF

      - Continue to develop and implement an appropriate and financially feasible staffing plan for the future growth of WHALE

      - Hire a neighborhood community outreach staff member representative of the low-income neighborhoods of the city

      - Continue to pursue internships with Universities and the utilization of the AmeriCorps Vista program to bring young talent and energy to the organization

- Update WHALE's computers and other technology when necessary to assure staff have the tools to work effectively and efficiently

b. BOARD OF DIRECTORS

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

c. COMMITTEES AND VOLUNTEERS

- Maintain regular meetings of the following Committees to support the staff and Board to implement the Strategic Plan:

    1. Executive
    2. Board Development & Governance
    3. Finance
    4. Community Committee (Development, Outreach and Education)
    5. Projects

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.

<u>Real Estate Development Key Evaluation Measures:</u>

Predevelopment Measures:

- Number of potential development projects identified and evaluated
- $ Value of Pre-Development and Feasibility Study Grants Secured

- Number of Community Partners Engaged in Feasibility and Pre-Development Activities

Housing Real Estate Development Measures:

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

Historic Preservation Development Measures:

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

Economic Revitalization and Community Development Measures:

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

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

- # of community partners engaged in advocacy work
- # of persons in the community engaged in education and advocacy projects and programs
- 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 will also report on a more frequent level to the Project Committee and Finance Committee, and Education and Advocacy Committee.

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:

- Howland House: historic restoration for affordable housing, partnering with The Resource, Inc. (TRI), a non-profit housing developer

- 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

- The Port Society Complex, restoration and accessibility for the Seamen's Bethel and Mariners' Home for a Fishing Heritage Center, partnering with the New Bedford Port Society and the Working Waterfront Festival

- Capital Theater: WHALE is working with the North-End's CDC the Community Economic Development Center, on an economic development mixed-use project

- 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

- Washington Square Gateway Park and Memorial, partnering with the NeighborWorks Southern MA and the City of New Bedford

- Zeiterion Theater: Historic and development management for the theater's restoration expansion plan

- Seaport Cultural District; member of the Steering Committee. The Cultural District in the low-income downtown neighborhood has been recently designated by the Massachusetts Cultural Council to spur the creative economy.

As a recently designated 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

The WHALE Strategic Plan 2019-2024 and this CIP are interwoven with the City's Master Plan: New Bedford 2020 and New Bedford Whaling National Historical Park's General Management Plan, *Charting the Future*. Both of these documents emphasize 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
- "Love the Ave"
- 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". In the past year WHALE has acted on many of the short-term and long-term objectives including applying for certification as both a CHDO and a CDC, creating a President's Council of past Presidents of WHALE, strengthening the new Partners in Preservation Program, and building our Revolving Loan Fund. Over the next five years, WHALE will finance its activities with a multi-pronged approach:

<u>Strategy 1: Expand the WHALE Revolving Loan Fund (RLF)</u>: The RLF is funded with foundation grants (1772 Foundation), Bank Grants, and returning project funds. Currently the RLF has $55,000 and will

be replenished in 2015 with $100,000 capital spent on acquisition and predevelopment for the Howland House project.

Strategy 2: Expand Developer Fee: 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 of its projects or assess a fee for service to provide developer consulting services to projects.

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 45 Partners in this program (9 new Partners in the last year) who have contributed 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 Membership Base

WHALE has a goal to increase its current membership of 400 to 500 over the next two years. In the past year, we have been able to bring on 35 new members. Benefits to Members include receiving monthly E-News on projects and programs of WHALE and important issues to New Bedford residents. WHALE members are also a source for our large volunteer base. In the last year, WHALE engaged over 80 volunteers to help with community projects and events.

Strategy 5: Capital Campaign Funding

WHALE runs capital campaigns to support important projects that require additional private investment. For example, we are currently engaged in a $500,000 capital campaign to restore the Seamen's Bethel and Mariner's Home and create a Fishermen's Heritage Center.

Strategy 6: Grants and Foundation Support

In 2019, WHALE has over $6M in grants and historic tax credits from state and federal resources as well as foundation support to fund our real estate projects. However, moving forward we would like 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 have adequate staff support on our many projects.

Strategy 7: Planned Giving Campaign

In the next year, WHALE will form a committee to launch a Planned Giving Campaign. Planned Giving matters, particularly for small and mid-sized organizations, because it is a way to plan for the future growth and strength of 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 58 years, WHALE has made a difference in the revitalization of this Gateway City. WHALE has rescued over 80 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 located 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 EEO/MBE requirements.

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 (such as mini-grants) assists residents in making smart and efficient decisions regarding improving their homes.

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 increase 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.

Plan Regionally

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