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WHALE Community Investment Plan 2015-2018

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Other Materials

Attachment A: CITC Program Cover Page and CIP Adoption Document

Attachment B: Service Area Target Map

Attachment C: Community Engagement Summary Report

Attachment D: WHALE Strategic Plan - Plan of Action

Attachment E: WHALE Operating Budget-2012, 2013, 2014

Attachment F: The Campaign for The Port Society Complex Flyer

Attachment G: Washington Square Gateway Park Flyer

Attachment H: Tom Lopes Community Sculpture Fund Flyer

Executive Summary

WHALE is a mature nonprofit organization that has an impressive 52-year track record of accomplishment in historic preservation work that has truly changed the low to moderate income neighborhoods of New Bedford. Our programs and projects encourage local residents, organizations and businesses to engage in historic preservation work that impacts the social, cultural, and economic development of New Bedford.

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 communities heritage;
- and protects irreplaceable places that matter to us.

Until the recent 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 new CDC in New Bedford, WHALE has and will be poised to engage and assist in historic projects that truly impact the community and economic development of New Bedford's neighborhoods. This Community Investment Plan (CIP) summarizes in nine elements WHALE's overall community development approach for New Bedford that will benefit our constituencies for 2015-2018. The Community Investment Tax Credits (CITC) will be a vital tool in assisting in implementing the CIP for the continued mission of revitalizing New Bedford through historic preservation.

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.

WHALE's focused target area has historically been the downtown and its surrounding low to moderate income neighborhoods. According to New Bedford's 2012 U.S. Census Data, the average median income (AMI) in the service area of New Bedford is \$36,789, compared to the AMI of \$66,658 state-wide. In WHALE's target area where its development projects have primarily taken place, the AMI is much lower, with downtown's household income at \$15,453 and the South-end neighborhood's income at \$25,735. Please see the attached map (Attachment B).

Demographics

According to the U.S. Census 2013 estimate, New Bedford has a population of 95,078, making it the 6th largest city in the state. The 2008-2012 Census has 21.6% 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 2014 U.S. Bureau of Labor Statistics.

The median household income in New Bedford is \$36,789 as compared to \$66,658 in MA. Rents in the city are lower than surrounding cities; the 2014 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.

Section 2: Involvement of Community Residents and Stakeholders

CIP Plan Development: The elements of this Community Investment Plan (CIP) were reviewed by the 18 member WHALE Board of Directors and voted for approval at their October Board Meeting. The CIP was also reviewed and received input at a Community Meeting on October 22nd at the Meeting Room located in the Ingraham School Community Center. Those attending included staff from NeighborWorks Southern MA and residents from the South-End and Washington Square.

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 *2013 WHALE Strategic Plan; Embarking on our Next Half-Century, A Strategic Plan for 2013-2018*. During the entire year of 2013, the Strategic Plan process included intense community outreach. Hundreds of WHALE members and friends responded to our surveys, providing feedback on our past work and suggestions and insights for the future, while all of WHALE's Board Members participated in an in-depth organizational assessment.

The Committee also drew on the wisdom of approximately 20 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 leaders of the neighborhood associations from the Far North End, Bullard Street, South Central, Cove Street, and Goulart Square Improvement Association.

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:** The Waterfront Historic Area League is on the steering committee of AHA! (Arts, History and Architecture). AHA! Night is a FREE arts & culture event which takes place the 2nd Thursday of every month in Downtown New Bedford. WHALE provides monthly 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 Preservation Act:** Most currently, WHALE is leading a grassroots campaign to encourage New Bedford's adoption of the Community Preservation Act (CPA). We have led many community CPA meetings with neighborhood stakeholders and have developed a list of community projects needed by neighborhoods, based on the stakeholders' input. We will continue to educate and work with community partners on CPA with the goal of passage on a November 2014 ballot.
- **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, and posters displayed throughout the Downtown area. Our free historic preservation cultural events on AHA! Nights are publicized on all AHA! Publicity and on an education and events calendar WHALE sends to all members and displays in local downtown stores and businesses.

WHALE plans to expand our community outreach efforts to LMI people in the coming months and years in our neighborhood restoration work. Current Executive Director Teri

Bernert has extensive experience leading CDC's and working towards engaging LMI people in projects and programs that will make a difference in the quality of life in their neighborhoods.

WHALE also engages in ongoing community needs assessment. Currently, we are regularly attending NeighborWorks Southern MA community meetings and working with them on the development of a Gateway Park to honor a Cape Verdean neighborhood community activist, Tom Lopes, and to memorialize the historic Victorian house that was lost to arson.

Further, we are gathering input for the Mariners' Home project, which will house a New Bedford Fishermen's Heritage Center. WHALE and Working Waterfront Festival held a Fishermen's Charette to collect feedback from the fishing community for the vision of the center dedicated to the fishermen of New Bedford.

Section 3: Plan 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 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
- Leveraging over \$4 million of project funding into the city

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

- ***Expand the Neighborhood Restoration Program to increase Historic Housing Development Projects in Downtown's Supporting Neighborhoods.***

In recent years, WHALE has initiated real estate projects in the South-end/Washington Square neighborhood just south of downtown and the New Bedford Whaling National Historical Park. This was the neighborhood where whaling merchants and workers who supported the whaling industry – the coopers, blacksmiths, etc. – lived. It is a neighborhood of both grand examples of Federal, Greek Revival, Italianate, and Gothic Revival architecture as well as a more simple version of the same. This historically Cape Verdean, low-income neighborhood has been somewhat neglected and has received little investment from private or public funding sources. The area was also hit hard by the foreclosure crisis, further destabilizing its historic fabric and leaving many historic buildings vacant or in diminished condition.

In the past five years under its Neighborhood Restoration Program, WHALE has initiated neighborhood planning, offered grants and preservation expertise for exterior façade rehabilitation for low-income homeowners, and partnered with Community Action for Better Housing (CABH) on the historic restoration of 24 Allen Street for affordable housing. We will also be commencing with restoration of the Howland House for affordable housing in 2015. These community development measures have helped to reverse the decline of properties in this area making a large impact on the community.

WHALE will continue to target abandoned or distressed historic properties for acquisition and renovation for affordable rental housing. WHALE will also build its Revolving Loan Fund (RLF) to acquire and restore vacant and foreclosed homes for sale to first-time homebuyers.

The long term goals of the Neighborhood Restoration Program are to revitalize blighted neighborhood nodes, thus creating stronger communities surrounding the downtown core of New Bedford. Through this work, WHALE will rebuild our as a tool for preservation and economic development in New Bedford.

WHALE will focus its increased staff capacity due to investment by the CITC to the Neighborhood Restoration Program.

- ***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.***

A large part of the revitalization of downtown New Bedford has been in its resurgence as an arts community. In 2011 Greater New Bedford was voted as the seventh "Most Artistic" city in America, according to an analysis of U.S. Census data by the Atlantic Monthly. MassINC's Gateway Cities project revealed that residents in Gateway cities have much greater support for arts and culture than do residents of the state overall. The study suggested that people have seen what the arts can mean to economic development.¹

Less than 20 years ago downtown New Bedford was an unwelcoming place. As industry dried up, residents of the city no longer gathered together downtown, and crime rates grew. Much of the rebirth of downtown is due to creative placemaking. Successful creative placemaking creates opportunities for people of all income levels and backgrounds to thrive in place. As its value increases, a place that is intentionally inclusive and connected is more likely to spur economic opportunity and allow people to succeed where they are. Creative placemaking supports economic diversity in the community, providing multiple points of entry and interaction for people of all incomes. The more economically integrated a community is, the more access to opportunity exists for all.²

¹ www.masstech.org/sites/mtc/files/.../Gateway%20Cities%20Report.pdf

² <http://www.artplaceamerica.org/articles/principles-of-creative-placemaking/>

In the next two years WHALE will complete its current projects to preserve the historic Seamen’s Bethel and Mariners Home for reuse as a Fishermen’s Heritage Center and to complete the feasibility study for the reuse of the First Baptist Church for a community theatre.

In the next three years we will strive to initiate other projects that both restore architecturally significant historic properties and reuse them to promote the development of the arts and culture of downtown New Bedford.

- ***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.

Section 4: Activities to be Undertaken

Activities to be undertaken as part of the CIP include:

Historic Preservation Real Estate Development

WHALE engages in historic preservation projects, including affordable housing, commercial, and cultural reuse and restoration project, with the goals of economic development, historic preservation, and neighborhood revitalization. Our real estate/revitalization projects benefit lower income households through job creation, housing opportunities, crime reduction and sense of neighborhood pride and culture. With flexible funding provided by the Community Investment Tax Credits, we will be able to allocate more staff resources to perform outreach and predevelopment work to increase the amount of affordable housing historic preservation projects WHALE undertakes in the next three years.

Neighborhood Restoration Program:



Howland House Affordable Housing

- The John Howland House: WHALE acquired and stabilized a fire-damaged and blighted historic mansion adjacent to downtown and in 2015 will restore it for 7 units of affordable rental housing. The \$1.9 million project has been awarded \$500,000 in DHCD HOME CHDO funds, as well as State and Federal Historic Tax Credits, NSP funding, and a grant from the Keen Charitable Foundation.



43 Pleasant Facade Restoration

- Historic Façade Mini-Grant Program: Recently WHALE completed four historic façade restoration projects for low-income homeowners in the south end of New Bedford. Matching grants and technical expertise are provided to restore historic facades for low to moderate income homeowners. The façade restoration program makes a difference for not only the individual homeowner, but impacts the entire streetscape and neighborhood pride. Funding included a grant from Stoico First-Fed and Rockland Trust. In the next three years we will apply for funding to continue the Façade Mini-Grant Program for low-income homeowners.



525 Purchase First Time Homebuyer Project

- Acquisition and Rehabilitation Program for First-time Homebuyers: The project targets key foreclosed historic properties which impact livability of neighborhoods. WHALE is working with the City to identify historic foreclosed properties, develop a scope of work, acquire and renovate, and sell the property to a qualified low-moderate income homebuyer. A future project is located at 525 Purchase Street, which we will commence with once the property clears land court in 2015. Our goal is to acquire, rehab and sell two properties (single family or two family) per year for 2015-2018 under this program.
- Washington Square Gateway Park and Memorial: WHALE and the City will partner to honor the Washington Square neighborhood through the creation of a beautiful green space at One Washington Square that will act as a gateway to the historic neighborhood just south of the downtown. Working with NeighborWorks of Southern Mass and the Lopes family, WHALE is

helping to include a community memorial to Tom Lopes—a well-known and respected Cape Verdean community leader and state representative— to be a key element of the Gateway Park. WHALE is assisting NeighborWorks Southern MA with a capital campaign to raise \$40,000 for a full-life bronze statue of Tom Lopes. This project instills neighborhood pride in the South-End, celebrates the community’s Cape Verdean heritage, beautifies the area and is an cultural asset to residents.

Resuse and Restoration of Historic Properties for Cultural Development:



Mariners' Home/Seamen's Bethel

- Mariner’s Home/Seamen’s Bethel: WHALE is currently partnering with the New Bedford Port Society to restore and make handicapped accessible the historic Seamen’s Bethel and Mariners’ Home in New Bedford and create the first New Bedford Fishing Heritage Center to honor the fishermen of New Bedford. The buildings are two of the most significant cultural and historic buildings in the city and are in dire need of restoration work. The Mariners’ Home is currently underutilized and closed to the public. The new Fishing Heritage Center which will be housed there will educate the public about the history and culture of New Bedford’s commercial fishing industry, document that culture and history for future generations, and honor and support the working men and women who make their living from the sea. WHALE will continue to work on this \$1.3 Million project over 2015. In 2014, the project received a \$440,000 Cultural Facilities Fund grant and \$75,000 of CDBG funds and has raised over \$300,000 in private and foundation funds.



First Baptist Church Community Theatre

- First Baptist Church: WHALE is partnering with Your Theatre to implement a reuse study of the historic First Baptist Church for a community theatre. The Church is a key landmark in the downtown neighborhood and is on the Preservation Massachusetts’ list of Ten Most

Endangered Historic Properties. The restoration and reuse of the church for a theatre will be a major catalyst for the further cultural and economic development of the area. The \$1.3 Million project is currently in the feasibility stage with construction estimated in late 2015. Project funding includes a grant from the MA Cultural Facilities Fund and a grant from the National Trust for Historic Preservation.

- WHALE, in collaboration with AHA! New Bedford, will be submitting an application to the Mass Cultural Council and area foundations to look at the feasibility of developing a non-profit arts and culture incubator in a vacant historic building within the downtown Cultural District. This collaborative space will contain non-profit office space, community gallery space, and classroom and workspace for artist and non-profit capacity building. The feasibility study will also include the possibility of low-income artist loft housing on an upper floor. The study will take place in 2015.

Community Education and Advocacy:

WHALE engages in education and advocacy efforts to strengthen the foundation for historic preservation in New Bedford. Our programs help to build the grassroots support for historic preservation citywide, among all New Bedford residents, of all ethnic, racial, and economic backgrounds.

- New Dollars/New Partners for Your Sacred Place: WHALE has just completed a program with Partners for Sacred Places, a national non-profit, to provide a training program to 8 area historic congregations for sustaining older religious properties and strengthening outreach.

Recent research by Partners for Sacred Places reveals that houses of worship are major contributors to the economy of their communities. “The Economic Halo Effect of Sacred Places” shows that urban congregations contribute an average of \$1.5 million to \$3 million in economic value to their communities each year, but their budgets are only a small fraction of their economic impact, so many historic religious properties are unable to be maintained by their congregation. New Dollars/New Partners guided each of the eight participating downtown congregations in creating a case statement, identifying internal assets and external assets, and laying the foundation for a community-wide capital campaign to bring the resources necessary for them to restore and maintain their historic religious property. Over the next year, WHALE will continue to give technical assistance to the congregations.

- AHA! Nights; AHA! (Art • History • Architecture) Night is a FREE arts & culture event which takes place the 2nd Thursday of every month in Downtown New Bedford. AHA! is free and open to the public and brings thousands into the downtown to participate in programming on the arts, culture and architecture in their city while also stimulating the economy. WHALE is on the Steering Committee of AHA! and participates on a monthly basis with architectural history tours of downtown, children’s workshops on the culture and architectural history of the city, and other informative programming. In 2014, a WHALE

historic scavenger hunt engaged 100 children in exploring the architectural history of their city.

- **Preserve New Bedford Campaign:** WHALE is a major contributor to the educational campaign to bring the Community Preservation Act (CPA) to New Bedford in 2014. WHALE is working with over 15 other non-profit partners on this effort. If passed on the ballot in November 2014, CPA will bring New Bedford needed funding for parks, recreation, historic preservation and affordable housing 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.

Real Estate Development Key Evaluation Measures:

Predevelopment Measures:

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

Housing Real Estate Development Measures:

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

Historic Preservation Development Measures:

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

Economic Revitalization and Community Development Measures:

- Number of Arts and Cultural Spaces created
- # of Jobs Created through Development Project
- Number of local contractors and staff employed

- Dollar value of project and economic benefit
- Impact of project to streetscape and place-making
- Spin-off revitalization impact for other projects in area

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

- # of community partners engaged in advocacy work
- # of persons in the community engaged in education and advocacy projects and programs
- 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:

- Oscar Romero House: restoration of a historic Victorian for affordable housing, partnered with Community Action for Better Housing (CABH), a non-profit housing organization
- 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
- New Dollars/New Partners for your Sacred Place, a training program for sustaining older religious properties and strengthening community outreach, partnering with the Inter-Church Council of Greater New Bedford
- Ingraham School, restoration for affordable housing and community center, partnered with the Women’s Institute for Housing and Community Development

- Washington Square Gateway Park and Memorial, partnering with the NeighborWorks Southern MA and the City of New Bedford
- Union and Coffin Lofts, multi-building Downtown Restoration Project for commercial and mixed-income housing, partnered with HallKeen
- AHA! Nights with WHALE, member of AHA! Steering Committee
- 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.
- Fishermen’s Heritage Center: a new cultural organization representing the fishing community. WHALE Executive Director is on the Founding Board to assist in steering the creation of this cultural organization.

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 2013-2018 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

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 Strategic Plan and 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
- AHA! Steering Board
- Fishermen’s Heritage Center Board
- NeighborWorks Southern MA

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:

Strategy 1: Expand the WHALE Revolving Loan Fund (RLF): 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 \$100,000 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, our goal is to double our Partner in Preservation contributions in 2015.

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 2014, WHALE has applied for \$3,404,000 in grants and historic tax credits from state and federal resources as well as foundation support to fund our real estate projects. Of the total applied for to date, our projects have been awarded \$2,010,600. Of this amount, only \$23,600 can be applied towards operating costs for the organization. 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.

| Grant and Foundation applications 2014 | | | | |
|---|------------------------------|--|-----------------------|-----------------------|
| <u>Project</u> | <u>Grant</u> | | <u>Amount Applied</u> | <u>Amount Awarded</u> |
| <i>Howland House</i> | | | | |
| | State Historic Tax Credit | | \$ 312,000 | \$ 150,000 |
| | Federal Historic Tax Credit | | \$ 312,000 | \$ 312,000 |
| | DHCD HOME fund | | \$ 500,000 | \$ 500,000 |
| | City HOME funds | | \$ 250,000 | \$ 250,000 |
| | Keene Trust | | \$ 50,000 | \$ 50,000 |
| <i>Subtotal</i> | | | \$ 1,424,000 | \$ 1,262,000 |
| <i>Port Society Complex</i> | | | | |
| | State Historic Tax Credit | | \$ 330,000 | waiting to hear |
| | MCC Cultural Facilities Fund | | \$ 500,000 | \$ 440,000 |
| | CDBG | | \$ 100,000 | \$ 100,000 |
| | Crapo Foundation | | \$ 100,000 | \$ 100,000 |
| | NPS Martime Heritage Grant | | \$ 200,000 | waiting to hear |
| | Capital Campaign | | \$ 500,000 | \$ 100,000 |
| <i>Subtotal</i> | | | \$ 1,730,000 | \$ 740,000 |
| <i>First Baptist Church</i> | | | | |
| | NTHP Favrot | | \$ 10,000 | \$ 10,000 |
| | MCC Cultural Facilities Fund | | \$ 25,000 | \$ 20,000 |
| <i>Subtotal</i> | | | \$ 35,000 | \$ 30,000 |
| <i>Neighborhood Restoration Program</i> | | | | |
| | City HOME (62 North) | | \$ 150,000 | Project aborted |
| | 1772 Foundation | | \$ 50,000 | \$ 50,000 |
| | Santander | | \$ 15,000 | \$ 5,000 |
| <i>Subtotal</i> | | | \$ 215,000 | \$ 55,000 |
| <i>Operating Grants</i> | | | | |
| | Baker/Enable Hope | | \$ 1,000 | waiting to hear |
| | Island Foundation | | \$ 10,000 | \$ 10,000 |
| | Grimshaw/Guidwitz | | \$ 3,000 | waiting to hear |
| | MCC Operating | | \$ 3,500 | \$ 3,600 |
| | CPA | | \$ 10,000 | \$ 10,000 |
| <i>Subtotal</i> | | | \$ 27,500 | \$ 23,600 |
| TOTAL | | | \$ 3,404,000 | \$ 2,110,600 |

Section 9: History, Track Record, and Sustainable Development

WHALE promotes the economic revitalization of downtown New Bedford and its surrounding neighborhoods through the acquisition and restoration of historic properties for reuse as cultural

venues, affordable housing, neighborhood commercial space and other uses that stimulate the local economy.

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

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

For 52 years, WHALE has made a difference in the revitalization of this Gateway City. WHALE has rescued over 50 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 and are valued at more than \$12 million. Investment in New Bedford's historic properties since 2005 totaled more than \$136 million bringing 500 construction jobs and 640 permanent jobs to the city.

Sustainable Development

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 into 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.