



# WHALE

Embarking on Our Next Half-Century  
A Strategic Plan for 2013-2018

[www.waterfrontleague.org](http://www.waterfrontleague.org)





“If you bulldoze your heritage,  
you become just anywhere.”

*-Sarah Delano, WHALE President, 1966-1982*

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*WHALE members volunteer for the Howland House clean up.*

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### Leading our effort have been WHALE Directors and supporters who served on the Strategic Plan Committee:

**Andrew P. Burnes**, President & CEO, HallKeen

**William A. Burns**, Board member

**Keri Cox**, Board member

**Lauren Doyle**, Board member

**Mark Hess**, Vice President of Acquisitions & Development, HallKeen

**Jen Nersesian**, Superintendent of New Bedford Whaling National Historical Park

**Danielle Poyant**, Board member

**Haven Roosevelt**, Board member

**Derek Santos**, Board member

The committee had the invaluable support of Wendy Nicholas, who orchestrated the process, secured critical financial support, and facilitated committee meetings and the full Board Retreat. WHALE staff member Diane Brodeur also provided much-needed support for the committee's work, helping to keep everything on track.

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 many leaders in the community and experts in historic preservation and neighborhood revitalization, including:

**Amy Anthony**, Preservation of Affordable Housing and national expert on housing

**Lisa Bergson**, WHALE's former Executive Director

**John Bullard**, WHALE's first "Agent" and former Mayor of New Bedford

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**Suzanne Braga** - South Central South First Neighborhood Association

**Latisha Silva** - South Central South First Neighborhood Association

**Loretta Bourque** - Cove Street Neighborhood Association

**Steve Pontes** - Goulart Square Improvement Association

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### Spring 2013

## SUMMARY

We love New Bedford. We love the rich history, diversity of community, and of course, the remarkable architecture of our neighborhoods. In 1962, when Urban Renewal threatened to destroy much of the history and architecture of the waterfront district, WHALE was founded by a small group of ordinary people who wanted to save the old whaling buildings from demolition. But they soon found out that they weren't ordinary at all, they were visionaries, way ahead of their time.

WHALE's first members looked at the deteriorated waterfront historic area—the 19<sup>th</sup> century whaling capital of the world—and could see beyond the blight that resulted from decades of neglect. They could see that by saving the buildings of New Bedford's storied past, they could help to secure its future—a revolutionary approach in the 1960s. Against long odds and with many partners, they did ground-breaking planning, helped to bring back cobblestone streets, survived explosions and fire. They also acquired buildings, renovated and repurposed them, and moved a few to fill vacant lots, sometimes hours before the arrival of the wrecking ball.

After decades of work and investment, New Bedford's historic waterfront area has been reborn, part of a resurgent downtown that is now home to New Bedford Whaling National Historical Park. The city as whole is in the midst of a renaissance due to strong City leadership, good planning, a thriving creative class, and a growing and diverse economy that has lifted New Bedford as a leading gateway city in the Commonwealth. But while much has been accomplished, there is much more to do.

While the 13 blocks and 70 buildings of the National Park are protected, there are 16 other designated National Register Historic Districts in New Bedford that encompass thousands of properties—many in need of preservation, and a few in real danger of demolition. These neighborhoods need, and merit, the same kind of attention that the historic waterfront has commanded for 50 years, and WHALE intends to do something about that.

This five-year strategic plan provides a framework for WHALE to step up its activity to increase the pace of historic preservation in New Bedford. In the pages that follow we outline a new framework to save endangered buildings, guide owners of historic properties, advocate for preservation-friendly policy, and communicate enthusiastically and often about the good work going on in New Bedford.

**WHALE envisions New Bedford as a vibrant seaport community where the historic and architectural heritage of its diverse peoples 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.**

To achieve this vision we have sharpened our focus. All of our work will be in New Bedford. We will be placing a greater emphasis on partnerships to expand capacity and accelerate results. Programming and education activities will once again be a big part of what we do, and we will drive our operations toward financial sustainability and growth.

But we can't do it alone, and we need your help. If you like our new direction, and if you love New Bedford, then grab an oar.

The next 50 years are going to be great!

## THE CHALLENGE

WHALE has an impressive 50-year track record of accomplishment. However, we must not rest on our laurels, since during such times of national economic uncertainty, New Bedford's architectural heritage is still at risk. While the buildings of the National Park are protected by strong preservation regulations and the New Bedford Historical Commission, there are 16 historic neighborhoods in New Bedford near the downtown and waterfront that have been designated National Register Historic Districts--encompassing thousands of properties. These districts are largely unprotected with many homes in need of preservation and a few in real danger of loss due to abandonment, neglect or demolition.

These historically significant areas merit the same kind of attention that the waterfront area has commanded since 1962, but in many of the districts, property conditions have deteriorated significantly in recent years. The pace of historic preservation and sensitive development must be accelerated. If not, New Bedford may lose much of its rich and diverse history, a history that can still be felt in the tight-knit, intact neighborhoods that grew up around the wharves and mills that provided the life blood of the city's economy.

The challenge that lies ahead is great, and the pressures that our historic structures and neighborhoods feel from both misguided development and neglect is very real. To meet these challenges, a robust and comprehensive campaign must be mounted to ensure a strong historic preservation ethic becomes infused into the culture of how our community pursues development, cares for our homes, and creates the policies that help to shape vibrant neighborhoods.

Yet, there are no New Bedford-based community development corporations or housing nonprofits addressing these issues. There are Boston-based, Cape Cod-based and Fall River-based groups doing projects in New Bedford, but there are no local CDCs or other groups doing the kind of neighborhood-focused building repair that WHALE has been doing in New Bedford for 50 years. WHALE is it!

Furthermore, our region has few, if any other, staffed historic preservation organizations or even private consultants for property owners or developers, whether for-profit or non-profit, to turn to for help. WHALE is *the* go-to group for people seeking expertise and know-how to guide their historic real estate development projects.

## WHY HISTORIC PRESERVATION MATTERS

Historic preservation is a powerful tool for community and economic revitalization that:

- stabilizes property values, and improves the community's housing stock and the character of whole neighborhoods;
- strengthens the local economy and helps create jobs;
- provides a foundation for cultural and heritage tourism, fostering civic beauty and bolstering community pride;
- improves business opportunities, promotes adaptive reuse of existing buildings
  - the 'greenest' form of new building;
- safeguards a community's heritage, making it available for current and future generations; and
- protects irreplaceable places that matter to us.

## A NEW APPROACH

WHALE must step up its activity to increase the pace of preservation in New Bedford. We must expand our approach and grow our capital resources. We must use all available tools, share our expertise widely, and form partnerships with others, in order to get much more done, much more quickly. And, we must engage many more people in the work of historic preservation and the work of WHALE.

Our current preservation projects—the John Howland House at 38 South Sixth Street and One Washington Square—are both in the historic Washington Square neighborhood, incredibly complex, and require significant investment. We have learned over the past five years that undertaking simultaneous projects that each take many years to complete is too much for us to accomplish on our own.

Therefore, to meet the challenges ahead, WHALE will pursue a multi-faceted approach. We will continue to rescue endangered historic properties within Washington Square, National Register District neighborhoods, and the downtown. We will also help private owners of historic properties be the very best stewards they can be of those properties, through education, training and connections to resources. We will forge an even stronger partnership with the City of New Bedford to adopt preservation-friendly policies and programs, and we will advocate for historic preservation everywhere in the city. Lastly, we will communicate broadly about historic preservation, and why it matters.

We understand and embrace the power of partnering with others to achieve mutual and broader goals. Indeed, if we are to increase the pace of preservation in New Bedford, we must plant the seeds of preservation widely. But our central partners will continue to be the City of New Bedford and the National Park Service—as they have been from the beginning.

Our vision and mission 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 development, programming, and education. By working closely with the Mayor's Office, the Office of City Planning, the Office of Housing and Community Development, and the staff at the National Park, we will ensure that our mutual goals are advanced and our successes deepened.

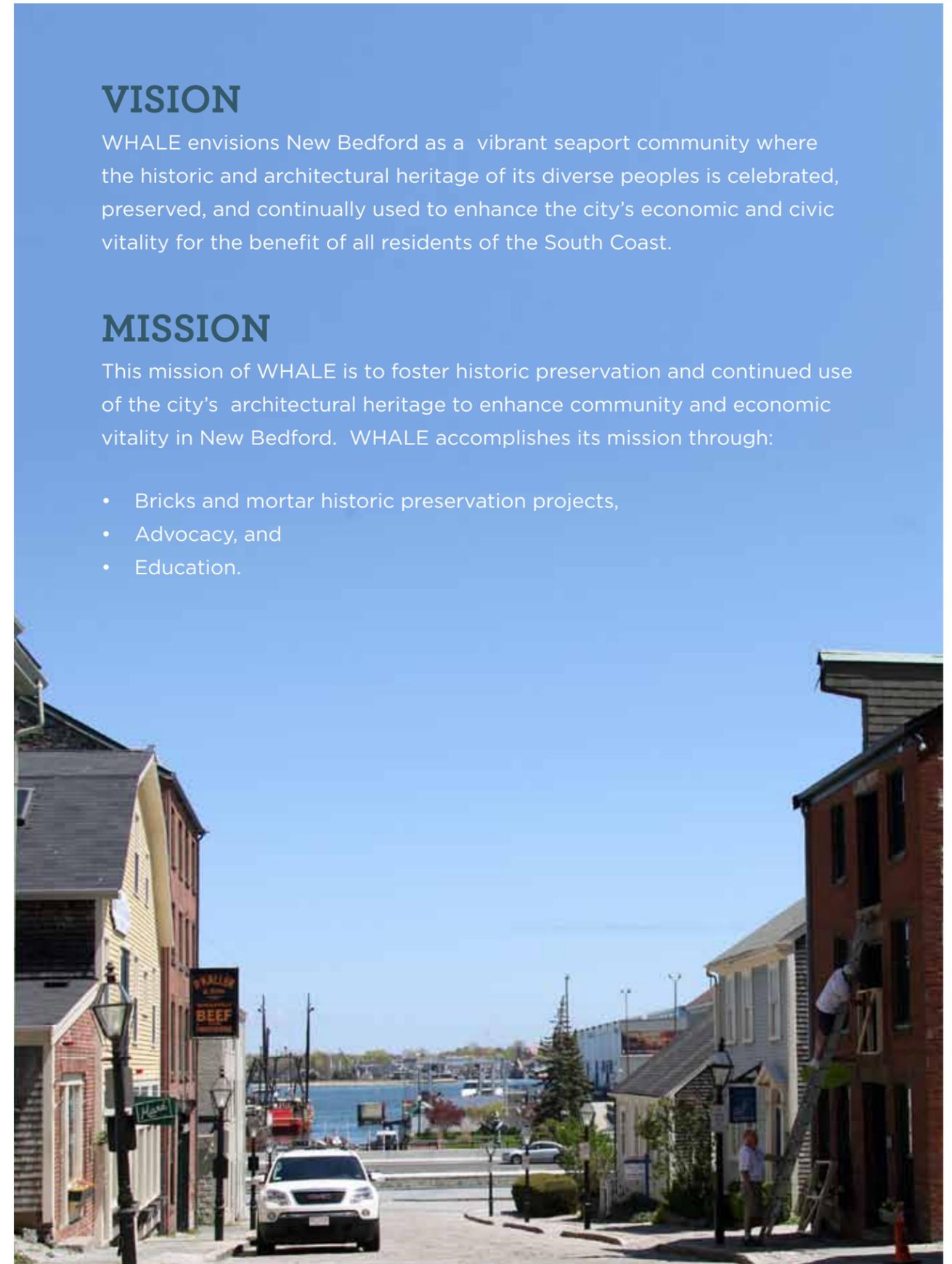
## VISION

WHALE envisions New Bedford as a vibrant seaport community where the historic and architectural heritage of its diverse peoples 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

This 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.





## STRATEGIC GOALS & OBJECTIVES

To achieve our vision and mission we have sharpened our focus and all of our preservation work will be in New Bedford's historic neighborhoods and the downtown. Over the next five years we will be placing a greater emphasis on partnerships to expand capacity and accelerate results. Public programming and education activities will once again be a big part of what we offer, and we will drive our operations toward financial sustainability and growth.

Following are the seven goals, with their associated objectives, that lay out the steps we need to take from 2013-2018 to carry out WHALE's mission and help to get us closer to our vision for New Bedford. At the end of this section there is a summary of the goals and the short-term objectives for 2013 and 2014. It is the intent of the Board of Directors to review progress at the end of 2014 to make sure the course we have charted is still advancing us towards our ultimate vision for New Bedford

### 1. Be the Voice for historic preservation in New Bedford, identifying and articulating what matters and why

- A. Develop and implement a comprehensive communications plan to convey WHALE's messages to both general public and targeted audiences
- B. Create a robust WHALE website to advance the Mission and specific Goals; maintain an ongoing program to keep the site fresh and drive viewers to it through regular e-blasts and social media
- C. Reframe and refresh WHALE's brand for its second half-century
- D. Build WHALE's Government Relations capacity and communicate regularly with community decision-makers re: historic preservation priorities, values, and benefits
- F. Assure that WHALE has people with solid historic preservation credentials on the staff, the Board of Directors and committees
- G. Recruit articulate, charismatic spokespersons for WHALE and historic preservation

### 2. Strengthen the foundation for historic preservation activity in New Bedford

- A. Advocate for and participate actively in creation of a citywide preservation plan, to include consideration of additional local historic districts and conservation districts
- B. Lead a coalition to pass the Community Preservation Act in New Bedford, in partnership with the City of New Bedford
- C. Build the grassroots support for historic preservation citywide, among all New Bedford residents, of all ethnic, racial, and economic backgrounds

### 3. Continue WHALE's 50-year commitment to the Waterfront Historic Area, now the New Bedford Whaling National Historical Park

- A. Insure that new construction within the Park compliments the historic character, scale and quality of the area and that renovation of existing buildings is of high quality
- B. Re-establish a visible presence for WHALE in the Park, relocating offices into an historic property
- C. Explore and formalize partnerships with the National Park Service; contribute to NPS strategic action planning for partnerships
- D. Offer preservation-focused programming for monthly AHA! Nights

**4. 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: Howland House and One Washington Square
- B. Establish a projects committee comprised of people with expertise to expand WHALE’s capacity to take direct action. Their first priority is to establish criteria for selecting future projects, including targeted geography.
- C. Develop a plan for WHALE’s future projects, considering among the potential roles: acquisition and re-development, partnerships with non-profit and for-profit developers, and purchase options
- D. Explore a direct partnership with the City’s Office of Housing & Community Development to provide low-interest loans and technical preservation assistance to owners of older and historic houses
- E. Identify and pursue other strong partnerships to accomplish property renovations
- F. Build a fee-for-service consulting capacity for historic preservation tax-credit projects

**5. Help property owners be excellent stewards of their historic and older properties**

- A. Provide “how-to” advice and training opportunities to property owners through workshops, on-line resources, access to WHALE’s resource library, and other media
- B. Explore a direct partnership with the City Office of Housing & Community Development to provide technical preservation assistance to owners of older and historic houses receiving OHCD loans
- C. Explore holding an Old House Fair, as a stand-alone event or a collaboration with an existing event, to provide old house owners with technical and product resources
- D. Consider creating a contractor referral service
- E. Share stories of successful property renovations as inspiration and model for others

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

**A. STAFF**

- Develop and implement an appropriate and feasible staffing plan for near-term and long-term, with job descriptions, appropriate compensation, and annual performance evaluations
- Recruit and hire a superb new executive director with the expertise and qualities to partner with the Board and lead the staff and volunteers to implement this Strategic Plan successfully
- Determine need/opportunity to use consultants to augment staff
- Update WHALE’s computers and other technology 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
- Identify areas of expertise, capacity, etc. needed on the Board of Directors in order to assure WHALE’s success; recruit new members to fill voids
- Establish and adopt written job descriptions for all officers and clear, written expectations for Board members
- Put in place an annual orientation program for new Directors

**C. COMMITTEES AND VOLUNTEERS**

- Create new committees necessary to support the staff and Board in implementing the Strategic Plan, with written job descriptions, annual work plans, and appropriate staff and Board oversight and support. Committees include:
  - Executive
  - Board Development & Governance
  - Finance
  - Communications
  - Development (with sub-committees)
  - Projects
  - Government Relations, Policy and Advocacy
  - Education and Outreach
  - Planning, Design & Architecture

**7. Assure that sufficient financial resources are in place for WHALE's current and long-term success**

**A. SHORT-TERM:**

- Establish a Development Committee and appropriate sub-committees (Membership, Corporate Drive, Events, etc.) comprised of Board and non-Board members
- Develop and implement a strategic financing plan for raising annual operating budget, including membership recruitment, individual giving/major gifts program, corporate fund drive, grants and sponsorships, and one major fundraising event
- Secure services of a fundraising consultant to build WHALE's fundraising capacity and assist Board, Development Committee and staff in implementing the plan
- Create a culture of giving among Board of Directors; establish specific expectations re: fundraising and personal contributions for Board members
- Create a strategic fundraising plan to accompany this strategic action plan

**B. MID- TO LONG-TERM:**

- Develop a financial plan to double WHALE's operating budget and expand its capital pool over 5 years. Implement.
  - A. Consider creating a corporate sponsorship program akin to Providence's Partners in Preservation
  - B. Grow WHALE's membership from 450 in 2012 to 1,000 by 2018
  - C. Consider building a fee-for-service business
  - D. Consider serving as a vehicle for pass-through of historic tax credit proceeds and grants to for-profit developers' preservation projects in order to support projects' financial viability
  - E. Consider establishing WHALE as a CHODO and/or Community Development Corporation

**Undertake and assist bricks-and-mortar preservation projects and build WHALE's revolving fund to accelerate the pace of building and neighborhood revitalization**

- Complete the Howland House and One Washington Square; celebrate completion of 24 Allen Street
- Repair roof at 525 Purchase Street; offer mini-grant + technical advice for exterior restoration
- Complete mini-grant-supported exterior restoration of 143 Pleasant Street
- Establish Projects Committee; define criteria for selecting WHALE's future projects
- Create strategy and plan to accelerate the pace of WHALE projects

**Be the Voice for historic preservation in New Bedford, identifying and articulating what matters and why**

- Seize opportunities for media coverage for WHALE projects and for historic preservation values
- Establish a Communications Committee and a comprehensive communications plan, with the development of WHALE website as first priority

**Strengthen the foundation for historic preservation activity in New Bedford**

- Advocate for and participate actively in creating a citywide preservation plan
- Lead a coalition to pass Community Preservation Act in New Bedford, with the City of New Bedford

**Help property owners be excellent stewards of their historic and older properties**

- Present a day-long training for caretakers of older and historic churches and synagogues; pursue funding support to bring Partners for Sacred Places' New Dollars/New Partners program to NB
- Develop and offer how-to workshops for owners of historic properties
- Establish Education and Outreach Committee; develop robust program for property owners

**Continue WHALE's 50-year commitment to the Waterfront Historic Area – now, the New Bedford Whaling National Historical Park**

- Advocate for excellent design in new construction and renovation projects
- Offer preservation-focused programs for six monthly AHA! Nights
- Be alert for financially-feasible opportunity to relocate WHALE offices into the National Park

**Put in place the human resources – staff and volunteer – necessary for success**

- Create the volunteer committee structure and staffing to drive implementation of the Plan
- Establish committees and provide clear job descriptions, expectations and timetables
- Recruit new Board members to bring needed expertise and capacity
- Provide excellent orientation and onboarding for Board, committee volunteers and new staff
- Hire excellent new executive to work with Board and lead staff and volunteers in implementing Plan

**Generate the financial resources for WHALE's current and long-term success**

- Create a culture of giving among Board of Directors; set firm expectations for giving/getting
- Establish a Development Committee comprised of Board and non-Board members
- Secure the services of a fundraising consultant
- Develop and implement a plan for raising annual budget, including Membership, Major Gifts, Annual Appeal, Grants, and Events
- Create a 5-year strategic financial plan, to accompany this strategic action plan

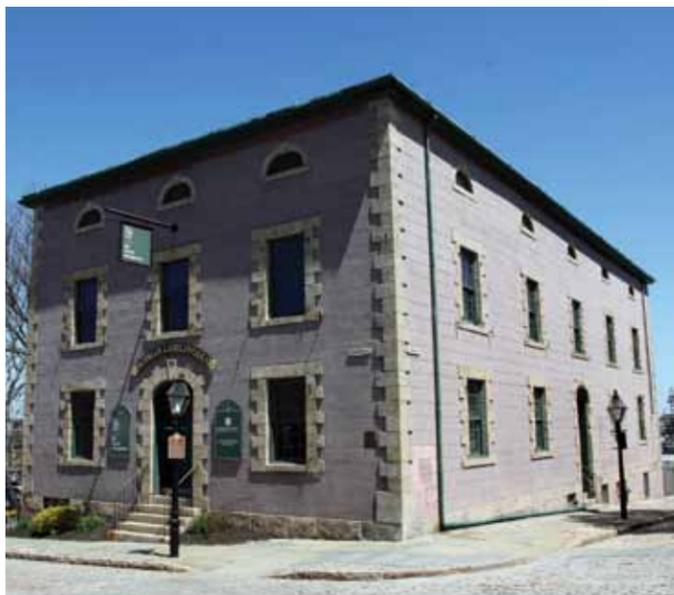


*During the past 50 years, WHALE has partnered to save more than 50 historic structures, including the Zeiterion Theater and the Rotch-Jones-Duff House.*



*Our next 50 years are going to be even better. Be part of the crew and join WHALE today!*

*WHALE was founded in 1962.*



*Today, WHALE projects have a value of more than \$12,000,000, and in the past 10 years alone. These projects have generated more than \$2,500,000 in tax revenue.*

*WHALE led the charge to establish New Bedford Whaling National Historical Park, and for the re-design of Route 18 to a pedestrian boulevard.*





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