



MAYOR
JON MITCHELL

DIRECTOR OF CITY PLANNING
JENNIFER CARLON

**City of New Bedford
Department of City Planning**

133 William Street · Room 303 · New Bedford, Massachusetts 02740
Telephone: (508) 979.1488 · Facsimile: (508) 979.1576

COMMUNITY PRESERVATION COMMITTEE

April 19, 2022

City Council President Ian Abreu, and
Honorable Members of the City Council
133 William Street
New Bedford, MA 02740

OFFICE OF THE CITY CLERK
NEW BEDFORD, MA
2022 APR 19 AM 8:57
CITY CLERK

RE: City Council Reconsideration CPA Project: New Bedford Whaling Museum Bourne Masonry Repair

Dear Council President Abreu and Honorable Members of the City Council:

Please accept this letter as the Community Preservation Committee's reconsideration request for the New Bedford Whaling Museum Bourne Masonry Repair Project. Old Dartmouth Historical Society, Inc., the proponent of the project, has indicated their desire to have the project reconsidered by the City Council relative to its rejection of the \$187,500 allocation at the City Council meeting on April 12, 2022.

The New Bedford City Ordinance, Chapter 2, Article XXIV, Community Preservation Committee, Sec. 2-243 (e) Operations, allows the opportunity for reconsideration relative to CPA projects rejected or reduced by the City Council. Please see the following for the above referenced ordinance:

Sec. 2-243 (e) OPERATIONS: Opportunity for Reconsideration. *In the event that the Committee initially proposes that a project be funded by the Community Preservation Act and that the initial proposal is rejected or reduced by the City Council, the Committee shall be given one (1) opportunity to respond to such actions by the City Council and/or to adjust the scope and terms of any proposed project prior to a final decision by the city council as to the allocation of Community Preservation Act funds for the given year.*

Please see the attached FY22 Funding Recommendation and a letter from Amanda McMullen, President and Chief Executive Officer of the Old Dartmouth Historical. The CPC respectfully requests your support for this request for reconsideration. I am at your disposal to answer any questions related to this matter.

Sincerely,

Janine da Silva

Janine da Silva
Chair

ATTACHMENTS: FY22 CPA Funding Recommendation – New Bedford Whaling Museum Bourne Masonry Repair
Old Dartmouth Historical Society Letter
New Bedford Whaling Museum Bourne Masonry Repair FY22 CPA Application

IN CITY COUNCIL, April 28, 2022

Dennis W. Farias, City Clerk

Referred to the Committee on Finance.
a true copy, attest:

Dennis W. Farias
City Clerk

COMMUNITY PRESERVATION COMMITTEE FY22 FUNDING RECOMMENDATION

Date: February 28, 2022
To: The Honorable City Council

PROJECT #12

PROJECT TITLE	New Bedford Whaling Museum: Bourne Masonry Restoration			
PROJECT LOCATION	18 Johnny Cake Hill			
APPLICANT/ORGANIZATION	Old Dartmouth Historical Society/New Bedford Whaling Museum			
FUNDING AMOUNT	\$187,500	CPA CATEGORY	Historic Resource	CITY WARD 4

PROJECT DESCRIPTION

The Whaling Museum is dedicated to telling the region's rich history within the walls of these historic buildings. The exterior masonry on all elevations of the Bourne building needs critical, urgent repair to prevent further water infiltration, mold growth, and deterioration of the exterior brick. This project recommendation will fund exterior masonry restoration of the Bourne building.

RECOMMENDED FUNDING

On February 10, 2022, by a vote of 8-0, the Community Preservation Committee recommended appropriating **\$187,500 from the Budgeted Reserve Fund** for a grant to Old Dartmouth Historical Society for the New Bedford Whaling Museum Bourne Masonry Restoration project in accordance with the terms and conditions of the Community Preservation Act Grant Agreement, and for the overall purposes summarized in this document.

ALIGNMENT WITH FY22 CPA PLAN

This project aligns with the FY22 CPA plan needs, priorities, and criteria by restoring and preserving a historic building with distinctive architectural merit; is located at a pivotal site; benefits the community at large in terms of historical, social, and cultural value; and addresses urgent repairs needed to the building envelope without which the resource is at risk for significant damage or loss if unaddressed.

MEASURES OF SUCCESS

The success of this project will be measured by the successful completion of the exterior masonry repairs work according to the U.S. Secretary of the Interior Standards for Rehabilitation.

FUNDING CONDITIONS

1. CPA funds are to be used for the masonry restoration work for all exterior elevations of the Bourne Building located at 18 Johnny Cake Hill, New Bedford.
2. Grantee agrees to execute the project complying with the U.S. Secretary of the Interior Standards for Rehabilitation and secure contractors who have demonstrated experience successfully completing projects to these standards.
3. No disbursement of funds may occur until the project has received all necessary permits and approvals.
4. Other conditions as deemed necessary and defined within the Community Preservation Act Grant Agreement.

PROJECT BUDGET SUBMITTED WITH APPLICATION

FUNDING SOURCES		EXPENSES			
		STUDY	SOFT COSTS*	ACQUISITION	CONSTRUCTION**
1	NEW BEDFORD CPA- REQUESTED	\$	\$	\$	\$187,500
2	NPS-Saving America's Treasures	\$	\$	\$	\$125,000
3	MOTT-Destination Development	\$	\$	\$	\$37,500
4	NBWM-Operating Funds	\$	\$	\$	\$25,000
TOTAL PROJECT COSTS		\$	\$	\$	\$375,000

* Soft costs include design, professional services, permitting fees, closing costs, legal, etc.

** Construction refers to new construction, rehabilitation, preservation, restoration work, and/or accessibility related expenses.

The full application is available at <https://www.newbedford-ma.gov/planning/application-info/>



NEW BEDFORD WHALING MUSEUM

18 Johnny Cake Hill
New Bedford
Massachusetts 02740-6398

Tel 508 997-0046
Fax 508 997-0018
whalingmuseum.org

April 14, 2022

City Council President Ian Abreu
New Bedford City Council
133 William Street
Room 215
New Bedford, MA 02740

APR 1 - 2022

Received

Dear President Abreu,

In accordance with the New Bedford City Ordinance, Chapter 2, Article XXIV, Community Preservation Committee, Sec. 2-243 (e) Operations, which allows the opportunity for reconsideration relative to CPA projects rejected or reduced by the City Council, the New Bedford Whaling Museum (NBWM) respectfully requests reconsideration for our Community Preservation Act application for funding of \$187,500.

Having received unanimous support from the New Bedford Community Preservation Committee (CPC), which recommended full funding for the Museum's request, we were disappointed to see the finance committee's vote. It is our hope that with the clarity below, the Finance Committee will be willing to reconsider NBWM's request and help us ensure the historic restoration of our building.

In accordance with the defined use of funds for the Community Preservation Act (CPA), NBWM project met the following Plan Category Specific Criteria:

- Preserves, protects, and restores a property of historic significance
- Property located at pivotal location and contributes to aesthetic of community, has historical, social and cultural value
- Benefits community at large through economic development – tourism; historical value; cultural value

During the March 21, 2022 City Council Finance Committee meeting where the CPC presented their approved projects, City Councilors expressed specific interest in understanding greater detail from NBWM on the following areas:

- Museum's contribution to the project costs (both phase and overall project)
- Use of endowment to fund the project
- Value of the museum to the community
- ARPA funding and if it will be able to be used on building rehabilitation

We have detailed our responses to address each area of concern below.

Museum's contribution to the project costs (both phase and overall project)

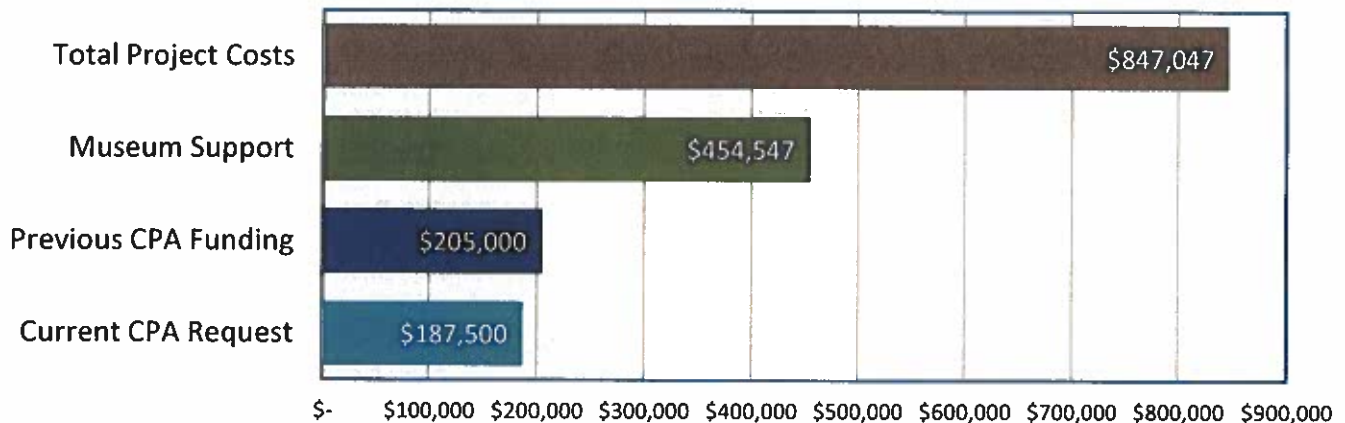
Committed to preservation of our physical spaces and our collection, NBWM developed a multi-year phased approach to the rehabilitation of two of our most historic buildings, the Wood Building and the Bourne Building. The question was raised with regards to the Museum's "contribution" to the request. The chart below illustrates that the Museum has already put more than \$450,000 towards this important work to restore the buildings and safeguard our artifacts. Knowing we would not be able to raise the funds or support these critical efforts all at once, NBWM developed the following phased effort.

Bourne & Wood Building Historic Preservation Project Phasing Plan

Phase 1 – repair and restoration of 50 original wood windows, wood trim, cupola, and painting of all Dates: March 2019-August 2019 Total Cost: \$308,913 CPA award FY2019: \$70,000	Phase 2 – masonry repair, repointing, and waterproofing Dates: April 2021-July 2022 Total Cost: \$538,134 CPA Award FY2021: \$135,000
--	--

Total Costs (both phases): \$847,047
 Total Museum Support to date: \$314,297
 Anticipated additional Museum Support: \$140,250
 TOTAL CPA Support to date: \$205,000
 FY2022 CPA Request: \$187,500

Bourne & Wood Building Historic Preservation Project Funding Sources



Use of endowment to fund the project

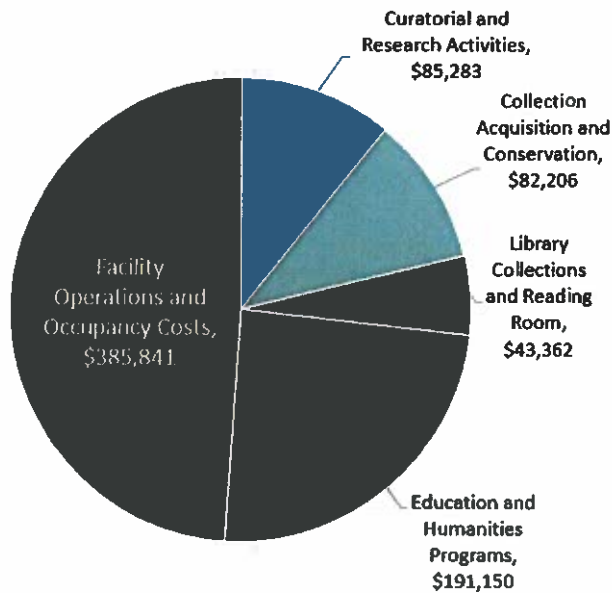
The New Bedford Whaling Museum has a \$17.5M endowment. Our endowment grows through market appreciation and through contributions. Our endowment is made up of 79 different funds from hundreds of donors over one hundred years. All contributors to our endowment gave or bequeathed the Museum funds to hold in perpetuity to ensure NBWM would be a forever institution. Endowments are not savings accounts that an organization can pull from to fund any project or effort. 34% of NBWM's endowment is restricted in purpose, meaning we cannot redirect those funds to support anything we want or need. These restrictions bind NBWM to allocate resources toward the particular purpose stated by the donor. This means, for example, NBWM cannot use collections endowment for a capital improvement or towards staff salaries. These restrictions are imposed by legal agreements. Violating them would bring consequences. Some of our endowment funds are unrestricted. However they cannot be liquidated and must still abide our investment and spending policies. These policies are consistent with the Uniform Prudent Management of Institutional Funds Act of 2006 (UPMIFA), as adopted by the Commonwealth of Massachusetts. Like most institutions, NBWM has already committed those unrestricted dollars for very good purposes such as facility operations, collections care and program support.

Endowments are built to be sustainable, long-term funds acting more along the lines of a retirement investment account. The donor gift that creates an endowed fund is invested and the Museum can only spend the investment income that it generates and in strict accordance with our spending policies. Our endowment funds are managed by an investment committee who oversees an investment advisor. Our board of trustees determines our investment and spending policies, which govern how much our endowment can distribute each

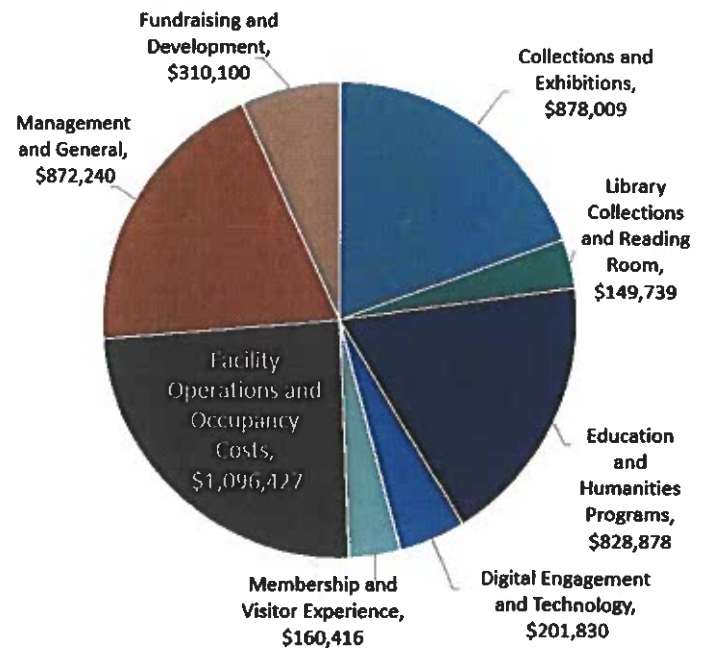
year. NBWM currently draws 4.5% off of our endowment annually. We do this for a number of reasons, but most importantly to ensure sustainability for the Museum for centuries.

The charts below illustrate NBWM's endowment and our current FY22 budget costs.

The Museum's \$17.5M Endowment provides for an annual draw of 4.5% in support of the annual budget with certain donor imposed restrictions. For 2022, the Endowment Draw is \$787,842 and is shown below by budget allocation based on those restrictions.



2022 Operating Expense Budget \$5,112,500



Value of the museum to the community

Founded in 1903 as the Old Dartmouth Historical Society, the New Bedford Whaling Museum ignites learning through explorations of art, history, science and culture rooted in the stories of people, the region and an international seaport. As the city and region's keeper of our shared heritage, NBWM takes our responsibility for care and preservation seriously. Prior to my tenure, NBWM made significant strides to increasing our role as an educational leader and active community partner. Under my leadership the Museum has advanced our efforts and dedicated additional resources to supporting our neighbors. Removing the barrier to participation at NBWM has been a stated priority and in 2021, the Museum offered more than \$192,000 in free and reduced admissions. Additionally, in 2021 we hosted 36 free programs which were enjoyed by 10,911 attendees. Already in 2022, we have hosted 10 free programs enjoyed by 13,687 attendees. Programs range from family fun to nationally recognized speakers like Loretta Ross, to internationally acclaimed events like Moby-Dick Marathon.

Last year, the NBWM hosted two free admissions days thanks to support from the Highland Street Foundation. In addition, 23% of our audience came in through one of our 20 discount admission programs, including:

- Free – every day – admission to the Jacobs Family Gallery
- 50% discount on admission for New Bedford residents
- Free admission under 3 years old
- Free admission for teachers
- Free admission to all active military members
- Free admission for DCF badge holder and child
- Reduced admission for EBT, WIC and ConnectorCare Cardholders and Wonderfund (Foster Families)
- Free admission for UMASS Dartmouth/Bristol Community College students

Since 2020 NBWM has donated more than 200 family memberships to local educators and donated 600 family memberships to lower-income residents through five social service community partners. This commitment has resulted in the Museum gifting \$80,000 in free memberships to New Bedford residents and teachers. In addition, NBWM offers Membership discounts for New Bedford Residents:

- \$40 individual (\$50 for non-residents)
- \$65 dual (\$80 for non-residents)
- \$85 family (\$100 for non-residents)
- Students & teachers are always \$25 a year regardless of residence

NBWM's High School Apprenticeship Program provides students who are entering the tenth grade and who live in New Bedford with access to resources and experiences that deepen community engagement, promote personal and professional development, and cultivate college and career success. Apprentices learn about whales and whale biology, the history of their city and the stories of the countless people whose culture, language, and accomplishments are exhibited throughout the Museum. Students connect their learning at the Museum to real-world experiences, visiting cultural sites, planning and hosting events and serving as Museum ambassadors. At the same time, the program helps Apprentices prepare for their futures. Apprentices visit college campuses, listen to career speakers, go on career shadows, gain personal financial management skills, and receive support through the entire college application and financial aid process.

The Museum funds a 6-week summer program and a school-year program that runs from October – June each year. The Apprenticeship is a 3-year commitment and apprentices are paid a bi-weekly stipend throughout their time in the program.

Since the program launched (2010), 100% of Senior Apprentices graduated from high school, and entered college or full-time employment following graduation, over 76% of Apprentices have graduated college or are still enrolled, and 39% of Apprentices or Apprentice Alumni have been employed full- or part-time by the Museum. All totaled, NBWM has invested a total \$1.8 million in the Apprenticeship program over the past decade and invests more than \$230,000 annually to support the New Bedford students enrolled in the program.

In addition, the Whaling Museum serves 15,000 students annually. During the pandemic we created a virtual live instruction program to support New Bedford public schools to complement our 4th grade science curriculum effort with NBPS called *Whales Today Live*.

In July 2020, we were the first museum in the Commonwealth to re-open because we were committed to safely driving tourism to the city. The Whaling Museum is one of very few organizations to bring 100,000 visitors to New Bedford during the pandemic. People come for the Museum but we all know that they feed parking meters, eat at restaurants, and shop locally. In speaking to the Standard-Times about expanding Tia Maria's European Café, owner Jessica Arruda recently noted "one of the factors was because of the Whaling Museum expansion plans. There's gonna be a lot of growth on our block," she said and continued "A lot of our customers are the Whaling Museum visitors. If they're growing, we need to grow with them," Arruda said.

While our visitation has been stronger during the pandemic than we expected, it still staggers significantly to what we would typically see annually, which runs closer to 100,000 people each year – 18% of whom are New Bedford residents. .

ARPA funding and if it will be able to be used on building rehabilitation

NBWM is awaiting the RFP guidance for the ARPA process. Assuming eligibility, we would expect to apply for support.

Please know I would welcome the chance to answer any further questions. I want to thank you for your willingness to reconsider our request for CPA funds. The Wood and Bourne Buildings are historic treasures. NBWM will not be in a position to proceed on this effort in the absence of support from the Community Preservation Act. We are hopeful the Finance Committee and the City Council will be supportive of this effort and vote affirmatively to confirm the recommendations of the CPC.

Sincerely,

A handwritten signature in blue ink, appearing to read "Amanda McMullen". The signature is fluid and cursive, with a large initial "A" and a stylized "M".

Amanda McMullen
President & CEO

CC: New Bedford Community Preservation Committee (CPC)



NEW BEDFORD COMMUNITY PRESERVATION COMMITTEE

STEP II

COMMUNITY PRESERVATION ACT PROJECT APPLICATION

FY22

Project Application Deadline:

NOVEMBER 12, 2021 by NOON

No late submissions will be accepted.

Applicants must submit this application no later than Noon on Friday, November 12, 2021. Please review the entire application packet before completing the application.

Applications will not be accepted--regardless of project eligibility--unless the STEP I Project Eligibility Determination Form was submitted and approved by the Community Preservation Committee.

COMMUNITY PRESERVATION COMMITTEE
Department of City Planning
City Hall Room 303 | 133 William Street
(508)979-1488 cpa@newbedford-ma.gov



CITY OF NEW BEDFORD
**COMMUNITY PRESERVATION ACT FY22
PROJECT APPLICATION**

PROJECT INFORMATION			
PROJECT TITLE	Whaling Museum: Bourne Building Masonry Repair		WARD 4C
PROJECT LOCATION	Whaling Museum, 18 Johnny Cake Hill, New Bedford, MA 02740		
LEGAL PROPERTY OWNER OF RECORD	Old Dartmouth Historical Society/New Bedford Whaling Museum		
CPA PROGRAM CATEGORY <i>(Select relevant categories for your project)</i>	<input type="checkbox"/> OPEN SPACE <input checked="" type="checkbox"/> HISTORIC RESOURCE		<input type="checkbox"/> RECREATION <input type="checkbox"/> HOUSING
ESTIMATED START DATE	June 2022	ESTIMATED COMPLETION DATE	November 2022
ONE SENTENCE DESCRIPTION OF PROJECT	Critical masonry repair and restoration including repair of failing angle iron headers, cracking brickwork, repointing and waterproofing		

APPLICANT INFORMATION			
APPLICANT ORGANIZATION NAME	Old Dartmouth Historical Society/New Bedford Whaling Museum		
APPLICANT IS <i>(Check only one)</i>	<input type="checkbox"/> CITY DEPARTMENT	<input checked="" type="checkbox"/> NON-PROFIT	<input type="checkbox"/> PRIVATE GROUP/CITIZEN
CO-APPLICANT ORGANIZATION NAME <i>(If applicable)</i>			
CO-APPLICANT IS <i>(Check only one)</i>	<input type="checkbox"/> CITY DEPARTMENT	<input checked="" type="checkbox"/> NON-PROFIT	<input type="checkbox"/> PRIVATE GROUP/CITIZEN
CONTACT PERSON	Michelle Taylor, Chief Administrative Officer and CFO		
MAILING ADDRESS	18 Johnny Cake Hill, New Bedford, MA 02740		
TELEPHONE #	508-717-6826	EMAIL:	mtaylor@whalingmuseum.org

BUDGET SUMMARY	
CPA FUNDING REQUEST <i>(must match CPA request-line 1 of Project Budget on page 8)</i>	\$ 187,500
TOTAL BUDGET FOR PROJECT	\$ 375,000

SIGNATURES		
I/we attest that all information provided in this entire submission is true and correct to the best of my/our knowledge and that no information has been excluded, which might reasonably affect funding. I/we authorize the Community Preservation Committee and/or the City of New Bedford to obtain verification from any source provided. I/we acknowledge and agree that a permanent restriction may be placed on the property as a condition of funding.		
APPLICANT NAME (printed) Michelle Taylor, CAO & CFO	SIGNATURE Michelle Taylor <small>Digitally signed by Michelle Taylor Date: 2021.11.08 16:46:42 -05'00'</small>	DATE: 11/8/21
CO-APPLICANT NAME (printed)	SIGNATURE	DATE:

Submission Checklist

The following items should be organized on your submitted flash drive in folders named for each applicable section below (e.g., Application, Financial, etc.). Please check off each item on this list if it is included in your submission packet. **Note: not all items will apply to each project.**

APPLICATION	
<input checked="" type="checkbox"/>	Application Cover Page (form provided)
<input checked="" type="checkbox"/>	Submission Checklist (this form)
<input checked="" type="checkbox"/>	Narratives (form provided)
<input checked="" type="checkbox"/>	Project Schedule – Project Budget – Funding Sources Summary (form provided)
<input checked="" type="checkbox"/>	Certificate of Vote of Corporation and Tax Compliance Certification (form provided) must be completed by both applicant and co-applicant. Completed by authorized board member. *Certificate of Vote named person must be different person from signer of the certificate.
FINANCIAL	
<input checked="" type="checkbox"/>	Construction Budget Summary – to be completed for construction projects ONLY (form provided)
<input checked="" type="checkbox"/>	1 written quote from a contractor and 1 cost estimate from an architect OR 2 written quotes from a contractor (Quotes must be submitted with application – late submissions will not be accepted)
<input checked="" type="checkbox"/>	Proof of secured funding (commitment letters or bank statements), if applicable. Please redact account numbers and any sensitive information.
OWNERSHIP/OPERATION (NON-CITY)	
<input type="checkbox"/>	If the applicant is not the owner, attach documentation of site control or written consent of owner to undertake the project. <i>Applications will not be reviewed without this documentation.</i>
<input checked="" type="checkbox"/>	Certificate of Good Standing (if operating as a corporation)
<input checked="" type="checkbox"/>	501(c)(3) certification (if operating as a non-profit)
<input checked="" type="checkbox"/>	Purchase & Sale agreement or copy of current recorded deed, if applicable.
COMMUNITY SUPPORT	
<input checked="" type="checkbox"/>	Letters of support from residents, community groups, city departments, boards or commissions, etc.
PLANS & REPORTS	
<i>The following plans and reports, if available, will strength your application. Submit in digital format only. Applicants are encouraged to submit as much detail as possible.</i>	
<input checked="" type="checkbox"/>	Renderings, site plans, engineering plans, design/bidding plans, specifications, and any MAAB variance requests.
<input type="checkbox"/>	Applicable reports (21E, Historic Structure Report, appraisals, survey plan, feasibility studies, etc.)
VISUAL	
<input checked="" type="checkbox"/>	Map of the property location (if applicable, show wetlands and wetland buffers, flood plain, water bodies, parks, open spaces, rails, and other features pertinent to the project). Applicants may use the City's interactive mapping website.
<input checked="" type="checkbox"/>	Photos of the project site (not more than four views per site) Digital copies <u>only</u> .
<input type="checkbox"/>	Catalog cuts (i.e. recreation equipment) if applicable.
FOR HISTORIC RESOURCE PROJECTS ONLY	
<input checked="" type="checkbox"/>	Documentation stating the project is listed on the State Register of Historic Places or a written determination from the New Bedford Historical Commission that the resource is significant in the history, archeology, architecture, or culture of New Bedford.
<input checked="" type="checkbox"/>	Photos documenting the condition of the property. Digital copies <u>only</u> .
<input checked="" type="checkbox"/>	Report or condition assessment by a qualified professional describing the current condition of the property, if available.
<input checked="" type="checkbox"/>	I/We have read the U.S. Secretary of the Interior's Standards for the Treatment of Historic Properties and understand that planning for and execution of this project must meet these standards.

PROJECT NARRATIVE

1 GENERAL NARRATIVE (1000 Character Maximum)

- Describe the project's location, the property involved and its proposed use.
- Describe the proposed scope of work.

The New Bedford Whaling Museum respectfully requests funding to support a critical masonry restoration project for the exterior of the historic Bourne Building, which is located on the Museum's campus within the New Bedford Whaling National Historical Park. The building suffers from deteriorating brick mortar joints, cracking and spalling of brick faces, and failing angle iron lintels, which have caused the brickwork at the window headers to bulge and crack. Left unattended, these masonry issues will worsen with weather and age and will lead to water damage to the interior plaster wall surfaces, mold growth, and a high risk of compromising the collections housed within the buildings.

The proposed scope consists of masonry restoration work on all elevations of the building and includes masonry re-pointing, removing and replacing cracked and/or spalled brick, removing and replacing failed angle iron lintels, and applying water-repellent, as needed, to masonry surfaces.

2 COMMUNITY NEED (1000 Character Maximum)

- What community need(s) will this project address? How does the project benefit the public and what populations(s) will it serve? If it serves a population currently underserved, please describe.
- How does the project preserve and enhance the character of New Bedford?

Built as a memorial to whalers and the city's whaling history, the Bourne Building is central to the Museum's mission to educate and interest all the public in the historic interaction worldwide of humans with whales; in history of Old Dartmouth and adjacent communities; and in regional maritime activity. Each year, 100,000 visitors, including more than 15,000 students, benefit from educational tours focused on the historical importance of New Bedford and the central role it played in whaling history and regional maritime activity. Structured school programs are provided to New Bedford Public School students free of charge. The museum offers free admission opportunities, numerous free public programs including the internationally celebrated Moby-Dick Marathon, and discounted membership rates for New Bedford residents. The building frequently serves as a venue for civic events in which city, state, national and international officials meet and address the public. The artifacts in the building are imperative to telling this story and engaging students and the community alike. The exterior restoration of this building will protect the Museum's ability to provide access to these historical and cultural resources for years to come.

3 GOALS & OBJECTIVES (1000 Character Maximum)

- Describe the project's goals and objectives. The objectives must be specific, measurable, achievable and realistic.
- How does the project meet the general and category-specific priorities outlined in the Community Preservation Plan or other current relevant planning documents?

The goal of the project is to restore the brick masonry of the Bourne Building through historic preservation in compliance with the Secretary of the Interior's Standards for Rehabilitation. This work will re-establish water-tight conditions, preserve the historic integrity of the building, and protect the artifacts within it.

The project aligns with general and category-specific priorities outlined in the Community Preservation Plan as follows:

1. The building is a historic building of distinctive architectural merit;
2. The scope of work serves to restore and preserve the original condition of this building;
3. The building houses Museum collections which also are historic and cultural resources of significance;
4. The scope of work serves to protect these collections;
5. The project is located at a pivotal and visually prominent site whose location is an indicator for the future wellbeing of a neighborhood;
6. The project benefits the community at large in terms of aesthetic contribution, historical value, social and cultural value, and economic development through tourism;
7. The Bourne Building and its distinctive cupola are iconic images representing New Bedford's extraordinary history and are sources of civic pride for residents.

4 MEASURING SUCCESS (1000 Character Maximum)

- *How will the success of this project be measured?*

The Museum's trustees anticipate that this scope of work will lead to the following outcomes:

1. Preservation of building envelope according to the Secretary of the Interior's Standards for the Treatment of Historic Properties;
2. Increase in civic pride with visible evidence of care for historic properties in the district;
3. Protection from water and mold damage;
4. A more stable environment for Museum collections in terms of temperature and humidity;
5. Energy savings from tightening of the building envelope;
6. Completion of all work by year-end 2022;
7. Completion of all work within budget.

5 COMMUNITY SUPPORT (1000 Character Maximum)

- *Explain the level of community support this project has received. If possible, please include letters of support from any groups or individuals who have endorsed this project.*

The preservation of the Bourne Building has wide public support. In 2019, the Whaling Museum completed Phase I preservation work, which included wood repair, window sealants, and painting. That phase of the project was supported by the City of New Bedford Community Preservation Fund, Massachusetts Historical Commission, MassCultural Council and the Amelia Peabody Charitable Fund. Importantly, many Museum members from the community stepped up to support the project with their individual donations.

In 2020, the Museum began Phase II preservation work that included masonry restoration work, masonry re-pointing, removing and replacing failed angle iron lintels, and the application of water-repellant, as needed to masonry surfaces. Despite pandemic related disruptions, all masonry restoration work on the Wood Building has been completed and work on the Bourne Building has begun with funds raised to-date from Museum members and remaining FY2021 CPA funding.

Rep. Antonio Cabral has previously declared these buildings as a "manifestation of the city's history as the world's leading whaling port and its role as 'The City that Lit the World'". Additional letters of support are attached with this application.

6 CRITICAL NEED (1000 Character Maximum)

- *Is this project of an urgent nature?*
- *Is there a deadline or factors not controlled by the applicant (i.e. opportunity for immediate acquisition, opportunity to leverage available non-CPA grant or other financial opportunity)?*
- *For historic resource applications only, is the property at risk for irreparable loss? If so, please include a condition assessment from a qualified professional if available.*

The project is urgent due to the potential for loss and destruction. Current conditions have led to pervasive leaking during rain and snow events. Due to age and weather, the masonry surface areas have deteriorated, with mortar thinned and/or missing and brick faces spalled and cracked. The material no longer serves the purpose of sealing the joints and keeping out water. Falling angle iron lintels are a structural issue that must also be addressed.

Receiving a CPA award would allow the Museum to continue the work through 2022 and cover a significant portion of the project on the highly visible Johnny Cake Hill- and Union Street-facing elevations. This will send an affirming message of the City's continued commitment to pursue and secure additional gifts from individual donors. Importantly, funders from outside of the community have expressed a strong preference for projects that have secured significant support from local sources.

PROJECT MANAGEMENT

1 APPLICANT INFORMATION (1000 Character Maximum)

- Describe applicant. Is applicant a public, private non-profit, private for-profit, an individual, a partnership, or another type of entity? What is their history and background?
- Identify and describe the roles of all participants (applicants, architects, contractors, etc.), including the project manager.
- Describe any past projects of similar type and scale, or experience that demonstrates the applicant's ability to carry out this project.

Founded in 1903, NBWM is a private Massachusetts not-for-profit corporation whose mission is to ignite learning through explorations of art, history, science and culture rooted in the stories of people, the region, and an international seaport. Amanda McMullen, President & CEO, and a 14-member Buildings & Grounds Committee will serve to ensure that project goals are achieved. Michelle Taylor is the Museum's CFO & CAO and the on-staff project manager for capital projects. Paul Choquette has been selected as masonry contractor.

NBWM has successfully executed four major capital projects within the past six years:

1. Wattles Jacobs Education Center, 2015, \$8 mil - added 20,000 sq. ft. of education, gallery, and event space
2. HVAC System Replacement, 2016, \$1 mil - modern, energy-efficient, museum-grade climate control
3. Captain Paul Cuffe Park, 2018, \$800k - outdoor gallery and public programming space
4. Phase 1 Bourne & Wood Building Restorations (Historic Preservation), 2019, \$300k - wood repair, window sealants, and painting
5. Phase 2 Wood Building Restorations (Historic Preservation), 2021, \$163,000 masonry re-pointing, removal and replacement of cracked and/or spalled brick, removal and replacement of failed angle iron lintels, and application of water-repellant

All of these projects were completed on time and on budget, demonstrating the resolve of Trustees and Management to maintain responsible stewardship of Museum resources and to deliver on promises to funders, members, and the community.

2 PROJECT FEASIBILITY (1000 Character Maximum)

- List and explain further actions or steps required for completion of the project, such as environmental assessments, zoning or other permits and approvals, agreement on terms of any required conservation, affordability or historic preservation agreements, subordination agreements, and any known or potential barriers or impediments to project implementation.

The existing conditions of the Bourne Building has been evaluated by two expert historical masonry contractors. Two comprehensive proposals have been submitted for review. These outline specifications and scope for the proposed grant-assisted work to be aligned with the Preservation Restriction. The general contractor will obtain all required permits and the Museum's project manager will oversee the project work to ensure compliance with the general provisions of the contract and preservation standards.

There are no known impediments to the project's implementation.

3 PROJECT MAINTENANCE (1000 Character Maximum)

- Please explain the long-term maintenance plan for the completed project.

The Museum maintains a Deferred Maintenance Schedule and Capital Plan for its campus. Visual inspections of all buildings are conducted routinely throughout the year and appropriate maintenance action is taken on an ongoing basis using available resources. The Board of Trustees has a standing Buildings and Grounds Committee which meets regularly. The Buildings and Grounds Committee reviews the Deferred Maintenance Schedule and recommends capital projects for completion based on an analysis of the risk, cost, and organizational impact of each project. Items are prioritized and addressed systematically.

Long-term maintenance for this project will include regular visual inspection and the appropriate level of treatment of issues or conditions of concern in accordance with preservation standards and guidelines.

COMPLETE FOR HISTORIC RESOURCE PROJECTS ONLY

CPA Compliance (1000 Character Maximum)

- Describe how the proposed project complies with the U.S. Secretary of the Interior's Standards for Rehabilitation, as required by the CPA legislation under the definition of rehabilitation.
- Describe how the applicant will ensure compliance with these standards as the project is ongoing, including an identification of who will make historic preservation determinations.

NBWM will ensure the project's scope of work complies with the Secretary of the Interior's Standards for Rehabilitation. Specifically, attention will be paid to Preservation Briefs 1, 2, and 16. Masonry repair and re-pointing will require identification, assessment, specification development, and application depending on the magnitude of work required in specific areas of the building facade. Masonry needing stabilization or repair will be completed with approved stabilization materials and approaches, such as by re-pointing the mortar joints where there is evidence of deterioration, disintegrating mortar, cracks in mortar joints, loose bricks, or damaged plaster on the interior. Where replacement is required, historic mortar joints will be duplicated in strength, composition, color, and texture. USHG, Inc. will complete lab sample analysis for the mortar. An evaluation of the condition of each of the angle iron lintels, which are structural as well as an important feature of the overall historic character of the building, will be conducted. The repair of these structural systems, by augmenting individual components and using recognized preservation methods, will be employed. Photographic documentation will be acquired before, during, and upon project completion.

COMPLETE FOR PROJECTS WITH ACCESSIBILITY REQUIREMENTS ONLY

CPA Compliance (500 Character Maximum)

- Describe how the proposed project complies with the ADA/MAAB Regulations.

COMPLETE FOR COMMUNITY HOUSING PROJECTS ONLY

CPA Compliance (500 Character Maximum)

- Describe how the proposed project complies with CPA affordability requirements (100% of AMI for New Bedford)
- Describe the number and types of units (e.g.: 1br, 2br).
- Provide a complete Development Budget and an Operating Budget (for rental properties).

PROJECT FINANCIAL INFORMATION

1 FINANCIAL INFORMATION (2000 Character Maximum)

- Describe all successful and unsuccessful attempts to secure funding and/or in-kind contributions, donations, or volunteer labor for the project. A bullet point list is acceptable.
- Will the project require CPA funding over multiple years? If so, provide estimated annual funding requirements.
- What is the basis for the total CPA request?
- How will the project be affected if it does not receive CPA funds or receives a reduced amount?

Still reeling from the impacts of the pandemic, the Museum's visitation and earned revenue streams saw a steep decline in 2020 and these challenges persist in 2021. The Museum's ability to secure funding for this capital project have been hampered by the critical need to secure funding for general operating needs and programming. An application was submitted to the Massachusetts Office of Travel and Tourism – Destination Development Grant but it was not funded. In addition, our 2020 and 2021 applications to the 1772 Foundation were both declined, citing that the project was too large.

This CPA request represents 50% of the remaining project costs. If CPA funds are not received, the project scope will be significantly reduced for the coming year. If the scope of work must be phased over multiple years due to insufficient funding, the conditions of the building will continue to deteriorate, water leaks will continue to threaten the structure and the Museum's collections, the total costs will be significantly higher, and disruption to Museum operations will be extended. It is imperative that this project is completed as soon as possible.

PROJECT SCHEDULE – PROJECT BUDGET – FUNDING SOURCE SUMMARY

PROJECT SCHEDULE

Please provide a project timeline below, noting all project milestones. Please note the City Council must approve all appropriations of CPA funds. Grant funding will not be available for disbursement until July 1, 2022.

	ACTIVITY	ESTIMATED DATE
PROJECT START DATE:	Masonry Repointing - Bourne (West)	June 2022
PROJECT MILESTONE:	Begin work on Bourne (South)	July 1, 2022
50% COMPLETION STAGE:	Complete work on Bourne (South)	July 31, 2022
PROJECT MILESTONE:	Complete work on Bourne (North)	October 2022
PROJECT COMPLETION DATE:	Complete work on Bourne (East)	November 2022

PROJECT BUDGET

Please include a **complete itemized budget** of all project expenses, including the proposed funding source for each expense, with your application. Note: CPA funds cannot be used for maintenance.

If the project received CPA funds in another fiscal year, please include this amount on a separate line, not on line 1.

FUNDING SOURCES		EXPENSES				
		STUDY	SOFT COSTS*	ACQUISITION	CONSTRUCTION**	TOTAL
1	NEW BEDFORD CPA***	\$	\$	\$	\$ 187,500	\$ 187,500
2	NPS-Saving America's Treasures	\$	\$	\$	\$ 125,000	\$ 125,000
3	MOTT-Destination Development	\$	\$	\$	\$ 37,500	\$ 37,500
4	NBWM - Operating Funds	\$	\$	\$	\$ 25,000	\$ 25,000
5		\$	\$	\$	\$	\$
6		\$	\$	\$	\$	\$
7		\$	\$	\$	\$	\$
TOTAL PROJECT COSTS		\$	\$	\$	\$ 375,000	\$ 375,000

* Soft costs include design, professional services, permitting fees, closing costs, legal, etc.

** Construction refers to new construction, rehabilitation, preservation, restoration work, and/or accessibility related expenses.

***New Bedford CPA (Line 1) amount should match the amount requested on the application cover page.

FUNDING SOURCE SUMMARY

Please explain the current status of each funding source (i.e., submitting application on X date, applied on X date, received award notification on X date, funds on hand, etc.). For sources where funding has been awarded or funds are on hand, please include documentation from the funding source (e.g., commitment letter, bank statement) in application packet.

FUNDING SOURCE	STATUS OF FUNDING
1 New Bedford CPA FY2022	Pending
2 NPS - Saving America's Treasures	Submitting application by December 14, 2021
3 MOTT - Destination Development	Applying in next round - expected to open Jan-Mar 2022
4 NBWM - Operating Funds	Committed in FY2022 budget
5	
6	
7	

CONSTRUCTION BUDGET
To be completed for construction projects only

ACTIVITY	CPA FUNDS	OTHER FUNDS	TOTAL
Acquisition Costs			
Land	\$	\$	\$
Existing Structures	\$	\$	\$
Other acquisition costs	\$	\$	\$
Site Work (not in construction contract)			
Demolition/clearance	\$	\$	\$
Other site costs	\$	\$	\$
Construction/Project Improvement Costs			
New Construction	\$	\$	\$
Rehabilitation	\$ 187,500	\$ 169,712	\$ 357,212
Performance bond premium	\$	\$	\$
Construction contingency (30%)	\$	\$ 17,788	\$ 17,788
Other		\$	\$
Architectural and Engineering (See Designer Fee Schedule for guidance): https://www.mass.gov/files/design_fee_schedule-dsb_2015_2007.pdf			
Architect fees	\$	\$	\$
Engineering fees	\$	\$	\$
Other A & E fees	\$	\$	\$
Other Owner Costs			
Appraisal fees	\$	\$	\$
Survey	\$	\$	\$
Soil boring/environmental/LBP	\$	\$	\$
Tap fees and impact fees	\$	\$	\$
Permitting fees	\$	\$	\$
Legal fees	\$	\$	\$
Other	\$	\$	\$
Miscellaneous Costs			
Developer fees	\$	\$	\$
Project reserves	\$	\$	\$
Relocation costs	\$	\$	\$
Project Administration & Management Costs			
Marketing/management	\$	\$	\$
Operating/Maintenance	\$	\$	\$
Taxes	\$	\$	\$
Insurance	\$	\$	\$
Other	\$	\$	\$
TOTAL	\$ 187,500	\$ 187,500	\$ 375,000

**CERTIFICATE OF VOTE OF CORPORATION AUTHORIZING
EXECUTION OF CORPORATE AGREEMENTS**

At a meeting of the Board of Directors of _____ (organization) duly called and held on _____, 20____ at which a quorum was present and acting throughout, the following vote was duly adopted.

VOTED: That _____ (person), the _____ (title) of the corporation, be and hereby is authorized to affix the Corporate Seal, sign and deliver in the name and on behalf of the corporation, contract documents with the City of New Bedford, the above mentioned documents to include but not be limited to Bids, Proposals, Deeds, Purchase and Sales Agreements, Agreements, Contracts, Leases, Licenses, Releases and Indemnifications; and also to seal and execute, as above, surety company bonds to secure bids and proposals and the performance of said contract and payment for labor and materials, all in such form and on such terms and conditions as he/she, by the execution thereof, shall deem proper.

A TRUE COPY, ATTEST:

PLEASE SEE SEPARATE CERTIFICATE OF VOTE DOCUMENT PROVIDED

Name (printed)

Signature (Affix Corporate Seal)

Title

Date

=====

TAX COMPLIANCE CERTIFICATION

Old Dartmouth Historical Society

Pursuant to M.G.L. c. 62C, §49A, I, on behalf of _____ (organization), certify under the penalties of perjury that, to the best of my knowledge and belief, is in compliance with all laws of the Commonwealth relating to taxes reporting of employees and contractor and withholding and remitting child support.

Michelle Taylor Digitally signed by Michelle Taylor
Date: 2021.11.08 19:02:00 -0500

Signature

Michelle Taylor, CAO & CFO

Print Name

Old Dartmouth Historical Society

04-2104805

Organization name

Federal Tax ID #

11/8/2021

Date