



NEW BEDFORD WHALING MUSEUM

18 Johnny Cake Hill • New Bedford, Massachusetts 02740-6398
www.whalingmuseum.org

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Mount Vernon Group Architects, Inc. (MVG)
Celebrating its 60th year of service, MVG is an award-winning architectural firm with offices located in New Bedford and Wakefield, MA. The firm is noted for its designs of educational and institutional buildings throughout the Northeast and Mid-Atlantic. The Museum engaged MVG in 2012.

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BUILDING

A Transformative Experience

ENVISIONING A NEW EDUCATION CENTER AND RESEARCH LIBRARY AT THE NEW BEDFORD WHALING MUSEUM



BUILDING

A Transformative Experience

Dear Friends,

On May 19, 2014 the New Bedford Whaling Museum will break ground for the construction of its new Education Center and Research Library. The culmination of years of planning, and fundraising, the new building will at long last allow the Museum to consolidate its staff, collections, research, and educational programs on Johnny Cake Hill. This new center is certain to bring great and lasting benefits both to the Museum's membership and the region it serves.

The combination of reaching 83% of our \$6.5 million fundraising goal coupled with a strong endowment, zero debt, repeated balanced budgets and dynamic and expanding programmatic activity greatly enhances the compelling case for donor support.

Trustees have discussed at great length how best an institution such as ours, in a community like New Bedford, can most usefully apportion its resources; when and how does it operate with optimal efficiency and when and in what amount capital investment in bricks and mortar is justified? Trustees have arrived at a solution that will ensure the long-term viability of the institution, justifying the capital investment in infrastructure while creating a platform for growth for decades into the future.

Over its 111 year history, dedicated and far-sighted members have consistently stepped forward to help underwrite the Museum's mission and ensure its economic stability. The entire region has benefitted from this generosity - from local grade-schoolers to world renowned scholars; from the descendants of 19th century whalers to every member of the community with an interest in the history, culture and art of the South Coast. We earnestly hope that you will become part of this great tradition and help to make the Education Center and Research Library a reality.

George B. Mock III
Capital Campaign Co-Chair

Donald S. Rice
Capital Campaign Co-Chair



“Through the new Center, the Museum is positioning itself to make major advances in its ability to preserve, transmit and disseminate, through education, much of the knowledge in its library and in its collection. We are most appreciative to the many supporters who have joined in this effort. Kathy and I are honored to be a part of it.”

— GURDON B. WATTLES

“Joan and I strongly support the Whaling Museum's new Education Center & Research Library, a key addition which will enhance the collection and bring education, research, and tourism benefits to the region. We invite you to join the many benefactors committed to a timely completion of this exciting project.”

— DR. IRWIN M. JACOBS

NBWM Educational Goals

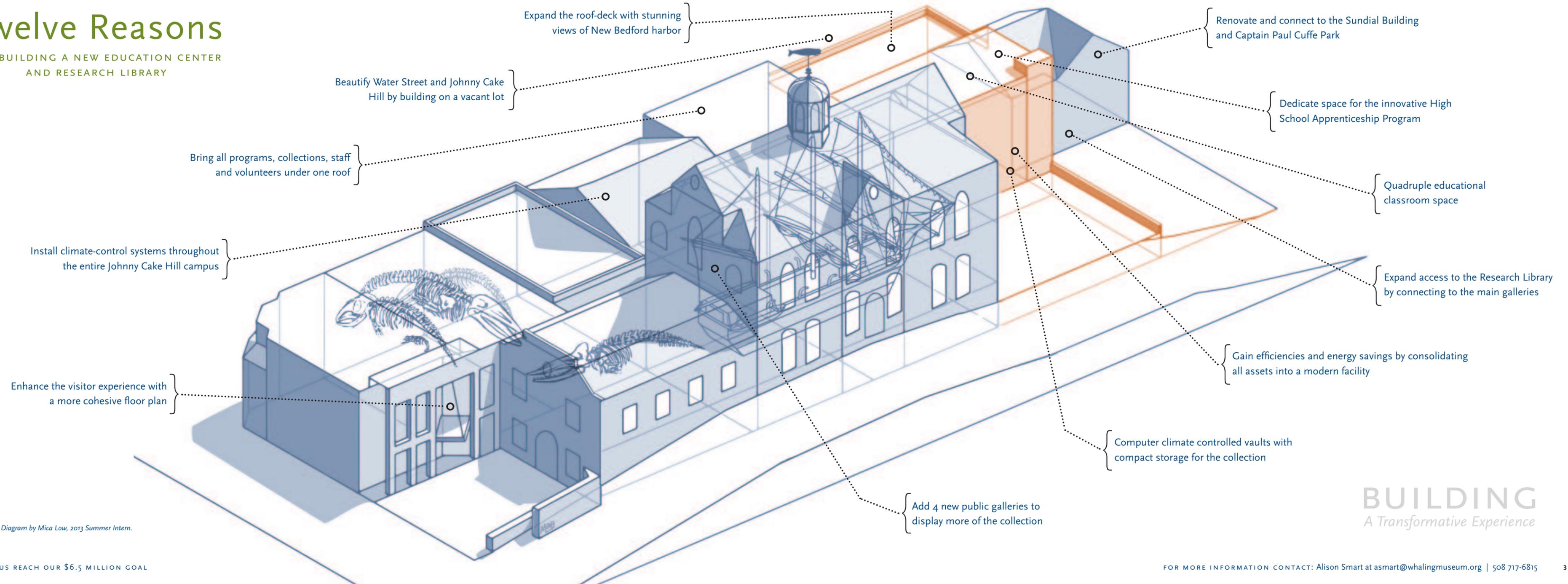
- Actively engage in efforts to improve educational attainment in New Bedford
- Provide meaningful out-of-the-classroom experiences for students and educators
- Expand reach and increase the number of K-12 students served
- Deepen college partnerships both with faculty and students
- Enhance the Research Library's reputation as a world center for scholarship
- Establish adult learning programs for life-long participation

“Thanks to the Whaling Museum I am more secure about myself and now I take chances at new things. Whenever people ask me what I do, I proudly say I am an Apprentice at the Whaling Museum.”

— JOSHUA VARGAS, APPRENTICE CLASS OF 2010

Twelve Reasons

FOR BUILDING A NEW EDUCATION CENTER
AND RESEARCH LIBRARY



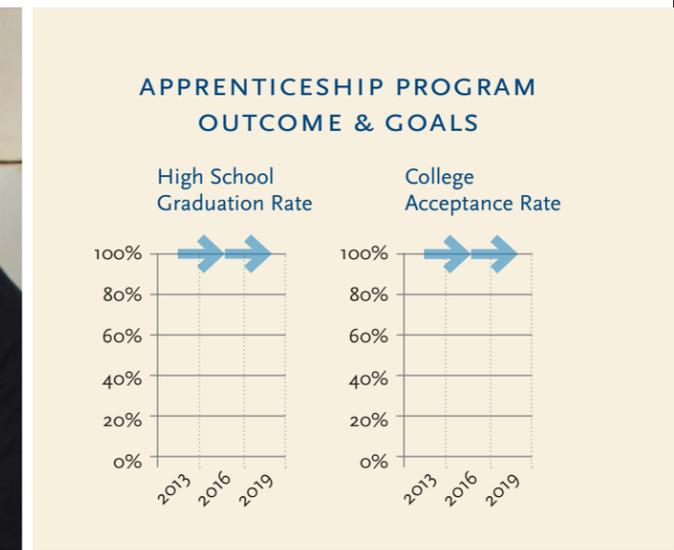
Building Diagram by Mica Low, 2013 Summer Intern.

BUILDING
A Transformative Experience



“The setup of the Museum is so user-friendly. The interactive activities at each exhibit engage students. They support and enhance students’ learning.”

— 2ND GRADE TEACHER FROM BRIDGEWATER, MA



K – 12 Education Programs

WHY THIS EDUCATION CENTER IS NECESSARY

1. School visits are being declined with increasing frequency due to lack of available classroom space
2. The current classroom does not have appropriate infrastructure for web-based learning

HOW THE EDUCATION CENTER WILL BENEFIT STUDENTS

1. Concurrent visits will be accommodated in new classrooms totaling 3,000 sq. feet (currently 680 sq. feet)
2. Flexibility will allow for varied group sizes and teaching approaches
3. Increase effectiveness of learning with smart classrooms and distance learning capabilities

CURRENT MEASURES OF SUCCESS

1. Half of the total museum attendance is comprised of children and youth
2. 12,000 participants are served in structured school programs annually
3. 13 unique Massachusetts CommonCore standards-based programs are offered

Apprenticeship Program

WHY THIS EDUCATION CENTER IS NECESSARY

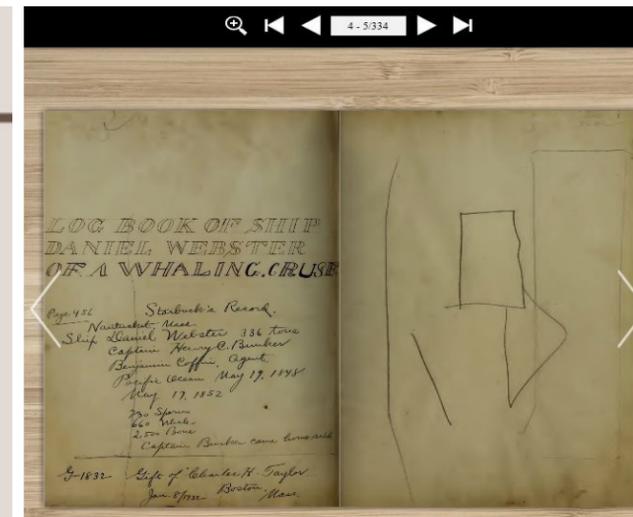
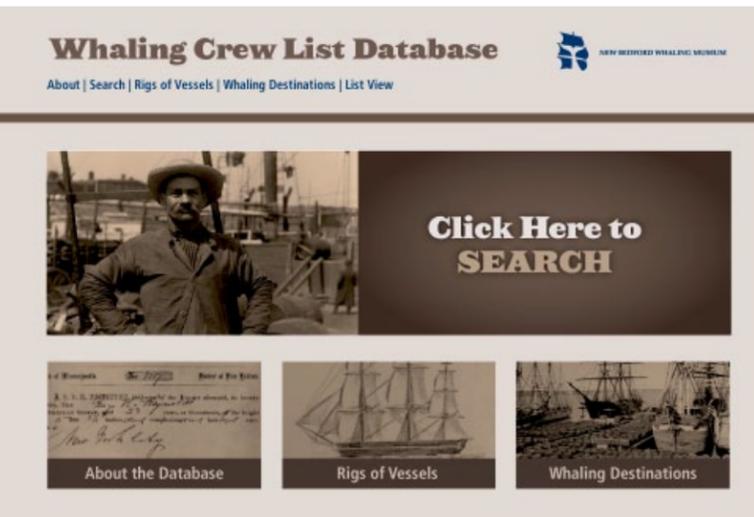
1. Apprentices must share classroom space with K-12 programs and facility rentals
2. Participating students have no dedicated personal workspaces
3. Growth of the program is stunted due to lack of space

HOW THE EDUCATION CENTER WILL BENEFIT APPRENTICES

1. Personal workspaces will allow for long term and team projects
2. Distance learning capability will enhance program content
3. Classroom space can accommodate more students as the program grows
4. Dedicated classroom space creates a sense of ownership and belonging

CURRENT MEASURES OF SUCCESS

1. 12 low-income local high school students are accepted for a unique service-focused apprenticeship
2. 100% of participants have both graduated high school and been accepted to college or the military
3. Students commit to 2 years of mentoring in their Junior and Senior years with a 95% retention rate
4. Enthusiastic private support forward-funds the program for 18 months



Volunteer Corps

WHY THIS EDUCATION CENTER IS NECESSARY

1. Docent and Library Corps are divided between 2 sites
2. Highly motivated Docent Corps has capacity to take on more K-12 programs

HOW THE EDUCATION CENTER WILL BENEFIT VOLUNTEERS

1. Provide a centralized "home base"
2. User-friendly reading room will facilitate and encourage volunteer research
3. Consolidation of administration will increase cohesion, effectiveness and esprit de corps
4. Distance learning capability will provide modern modules for training and continuing education

CURRENT MEASURES OF SUCCESS

1. Engage 120 active volunteers
2. Volunteer services amounts to \$400,000 in-kind value each year
3. Docent program is strong, ritualized and self-managed



Research Library

WHY THIS RESEARCH LIBRARY IS NECESSARY

1. Library collection is located in an off-site facility making access difficult
2. The current Library is not equipped to support digitization of the collection

HOW THE RESEARCH LIBRARY WILL BENEFIT SCHOLARSHIP

1. User-friendly reading room will accommodate more students, scholars and enthusiasts
2. Digitization will greatly expand access to the collection
3. All collection resources will be centrally located on the main campus

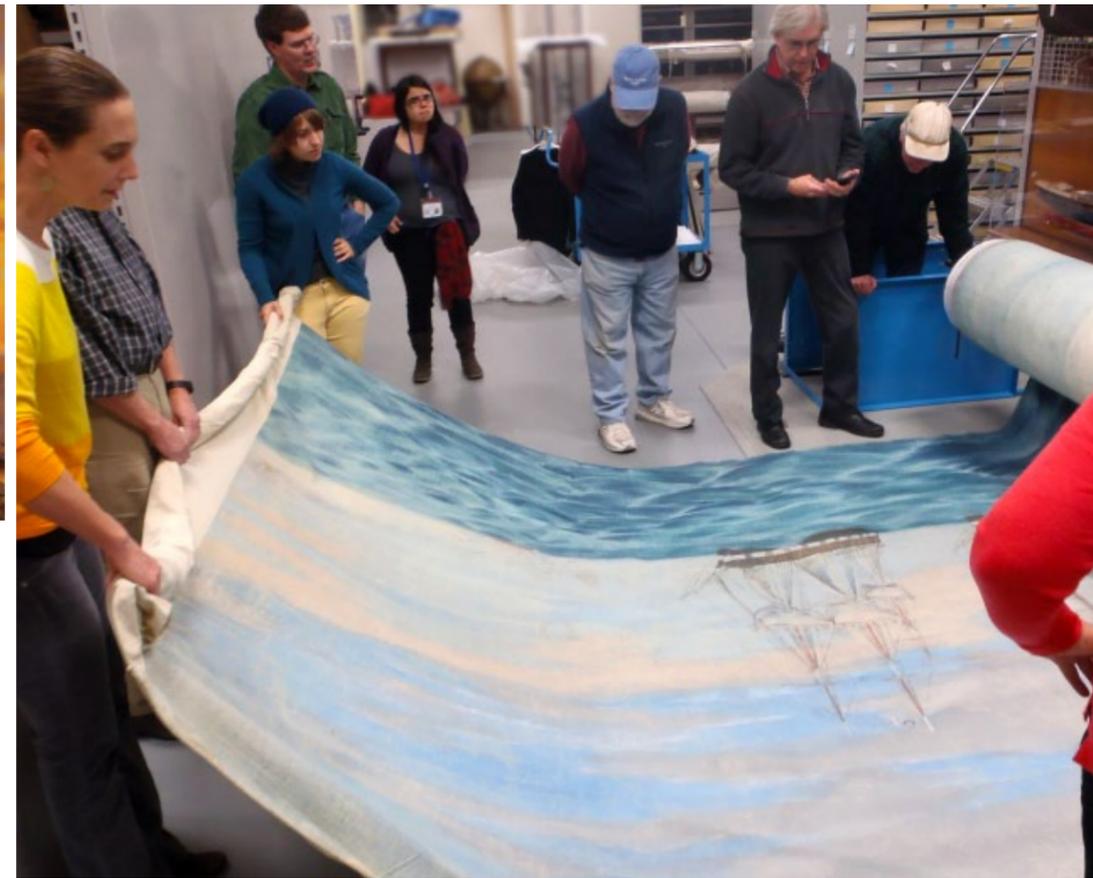
CURRENT MEASURES OF SUCCESS

1. Facilitate high level scholarship utilizing collection of 500,000 books, manuscripts, journals
2. Host 100+ visiting scholars each year
3. Aggressive digitization of collections through partnerships with NOAA, Boston Public Library and others



“...I have finished my novel and want to thank the staff and volunteers of the Whaling Museum Research Library for all of your help. I could never have written the book without you. Also, thank you for allowing me the wonderful once-in-a-lifetime opportunity to look through the Merchant Bank book collection, an opportunity which changed my life. I just recently renewed my museum membership and hope to be a contributing member for a long time to come.”

— NOVELIST AND SCHOLAR FROM CHICAGO, IL



Care of Collections

WHY THIS CAPITAL INVESTMENT IS NECESSARY

1. Inefficient, old climate controls and security systems impede care of collections
2. Two sites require duplication of systems, staffing and security

HOW THE COLLECTION WILL BENEFIT FROM THIS INVESTMENT

1. Installing a campus-wide climate control system will bring all space up to nationally recognized museum standards
2. Modern controls and storage units will allow for enhanced stewardship of irreplaceable artifacts

CURRENT MEASURES OF SUCCESS

1. New climate controls in the Bourne Building and Wattles Family Gallery allow more space for collection exhibition
2. Donations to the collection are growing in number and in value
3. The Museum will embark upon its largest conservation effort ever – the 1,275 ft. long *Panorama of A Whaling Voyage 'Round the World*



“ I always put the Museum on the top of our list when we have visitors. There is always something new to see. When I don't visit for a few months, I feel like I am missing something!”

— MEMBER FROM ROCHESTER, MA

Architectural Renderings

NORTH WATER STREET ELEVATION (Right)

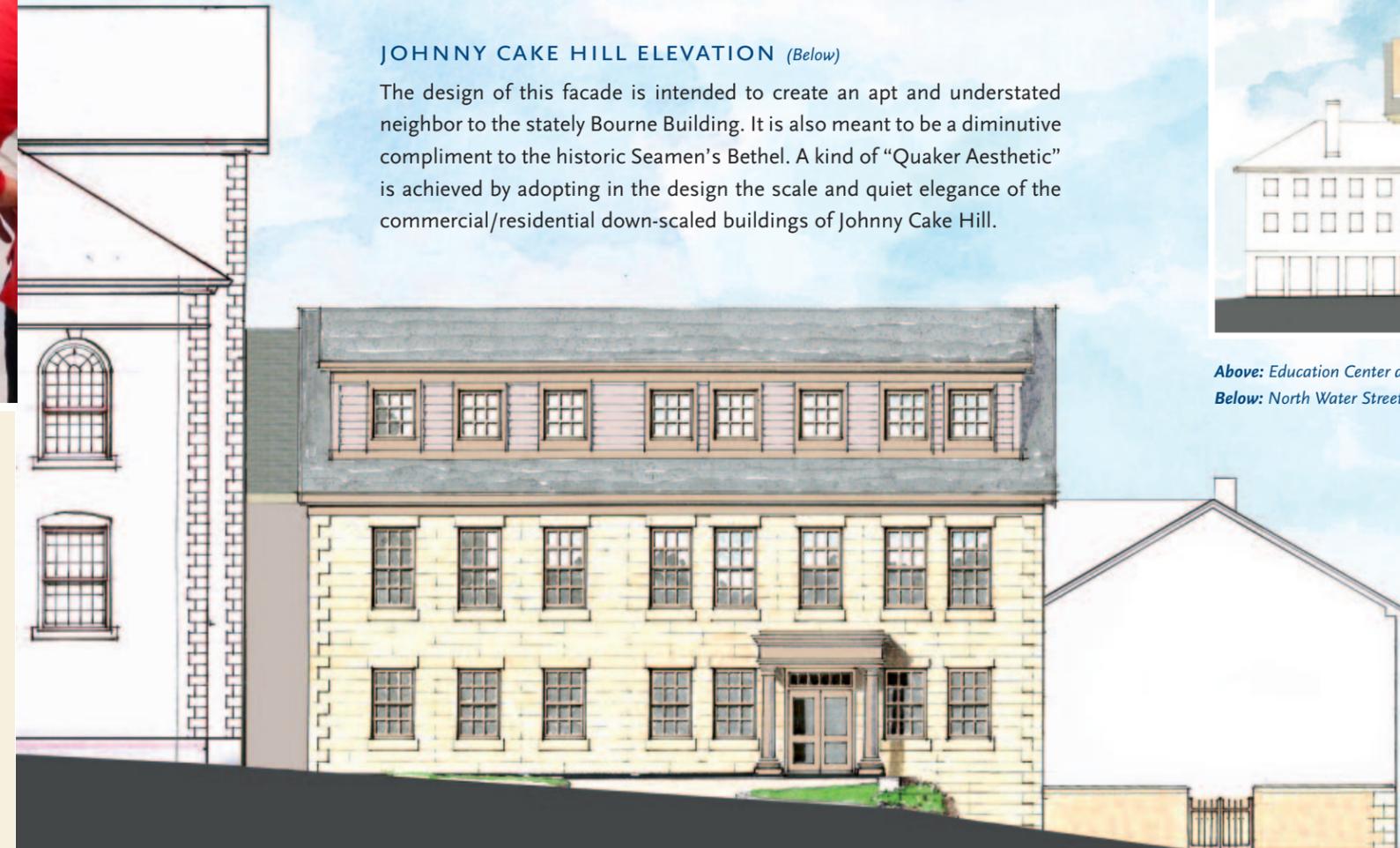
Joining a row of existing buildings, this side of the building addresses the street edge directly and helps define and reinforce the character of its neighborhood. The form of the facade is derived from a traditional New Bedford mercantile building of the mid to late nineteenth century. This aesthetic will help reinforce the Historic District's relationship to the waterfront by completing the block and by providing the focus of an important view corridor up Rose Alley.

JOHNNY CAKE HILL ELEVATION (Below)

The design of this facade is intended to create an apt and understated neighbor to the stately Bourne Building. It is also meant to be a diminutive compliment to the historic Seamen's Bethel. A kind of “Quaker Aesthetic” is achieved by adopting in the design the scale and quiet elegance of the commercial/residential down-scaled buildings of Johnny Cake Hill.



Above: Education Center and Research Library Site (section in orange).
Below: North Water Street Elevation next to the Sundial building.



Financial Capacity

Over the past several years, Trustees have prioritized building financial capacity in anticipation of this campaign. Three key strategies were identified in this regard:

ENDOWMENT GROWTH

This fund now stands at \$8.6M from its recessionary low of \$3.9M in 2008. Over half of this growth can be attributed to cash contributions.

A FOCUS ON OPERATING INCOME

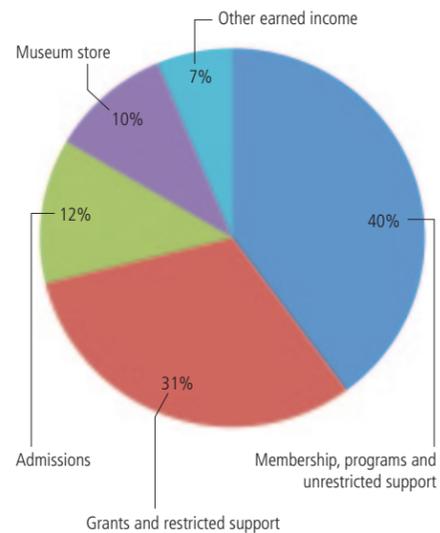
Revenue from private sources has increased by 30% in the past 3 years. Both philanthropy and earned income have contributed to this growth.

DEBT ELIMINATION

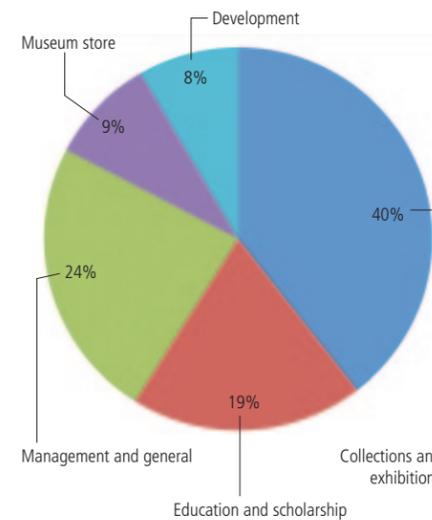
Through generous donations and operating surpluses, the Museum eliminated almost \$3M in short and long-term debt and is now 100% debt-free.

With a strong balance sheet and 6 consecutive years of positive operating results, Trustees feel confident in the organization's financial position. As of March 2014, \$5.4M is committed towards a \$6.5M goal, with one third of this total contributed by the current Board of Trustees. These donations demonstrate their deep commitment and dedicated leadership.

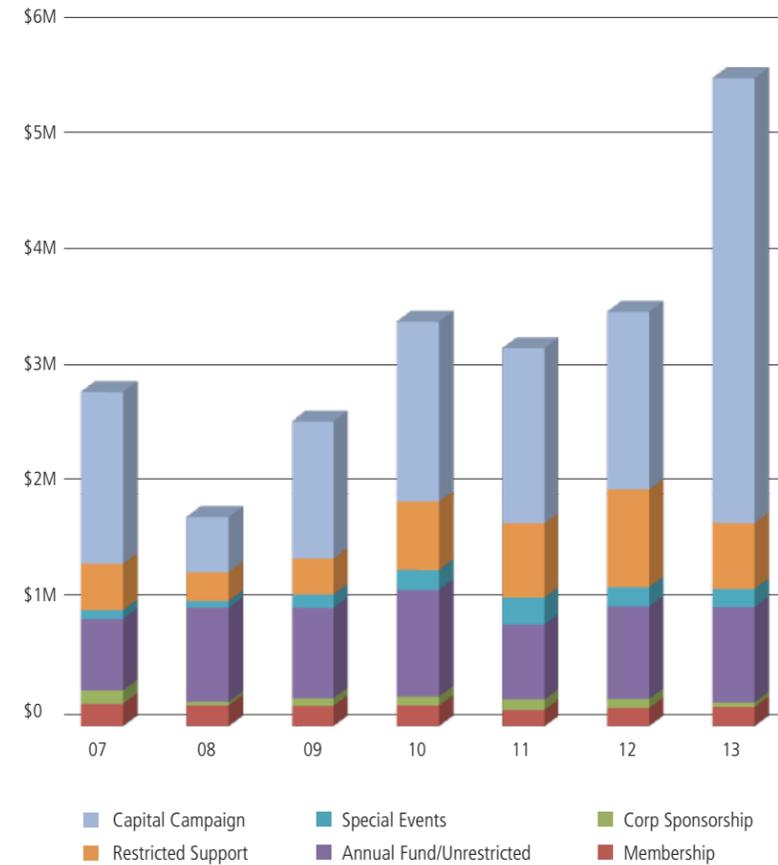
2013 OPERATING INCOME



2013 OPERATING EXPENSES



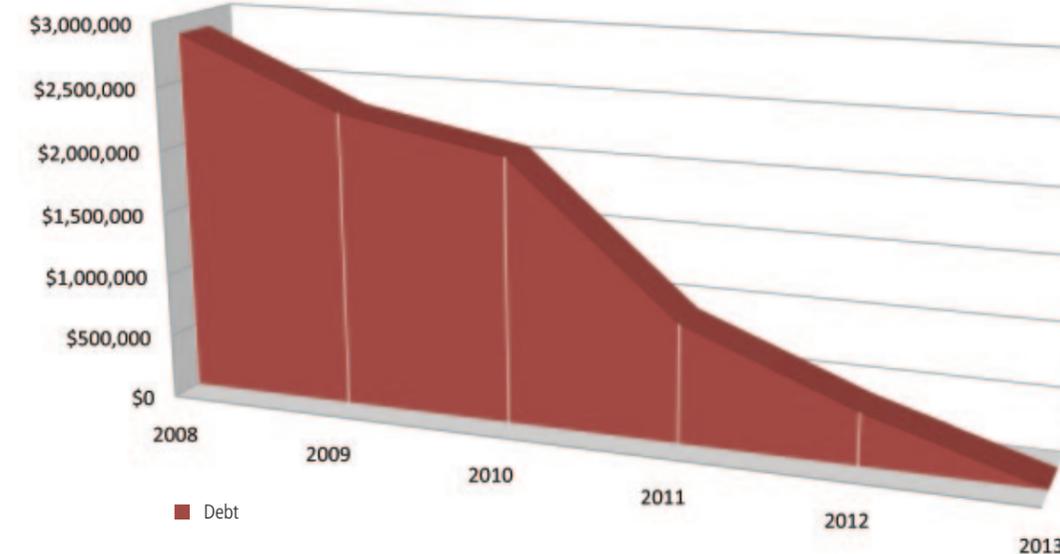
PHILANTHROPY FROM PRIVATE SOURCES



The NBWM is the only Museum on the South Coast achieving a prestigious accreditation from the American Alliance of Museums.



ELIMINATION OF DEBT



MAJOR ACCOMPLISHMENTS 2010 – 2014

- Restoration of the 1916 Bourne Building
- Unveiling of the Wattles Family Gallery
- Founding of the Apprenticeship Program
- Establishment of the Azorean Whaleman Gallery
- Unveiling of the Cape Verdean Maritime Exhibition
- Dedication of Captain Paul Cuffe Park
- Elimination 3,000,000 in long-term debt
- Endowment tops \$8,600,000 (2014)
- Mounting of over 35 new exhibitions

NBWM STATS

- **91,000:** Total annual visitors (2013)
- **45,000:** Visitors who received free or discounted admission through community programs
- **3,000:** Members and donors
- **12,000:** Annual participants of structured school programs
- **750,000:** Total items in the Museum's collection
- **\$3,300,000:** Annual operating budget (2014)
- **\$500,000:** Annual contribution of services to South Coast communities
- **\$27,000,000:** Total net assets (2013)
- **\$1,100,000:** Funds needed to reach campaign goal
- **1:** Number of donors it takes to make a difference!



Construction Budget

EDUCATION CENTER AND RESEARCH LIBRARY

Expense

Phase 1 - Core building design and construction <i>May '14 - January '15</i>	\$ 5,700,000
Phase 2 - Fit-out of classrooms, exhibition galleries and storage areas <i>January '15 - May '15</i>	\$ 800,000
Total Expense	\$ 6,500,000

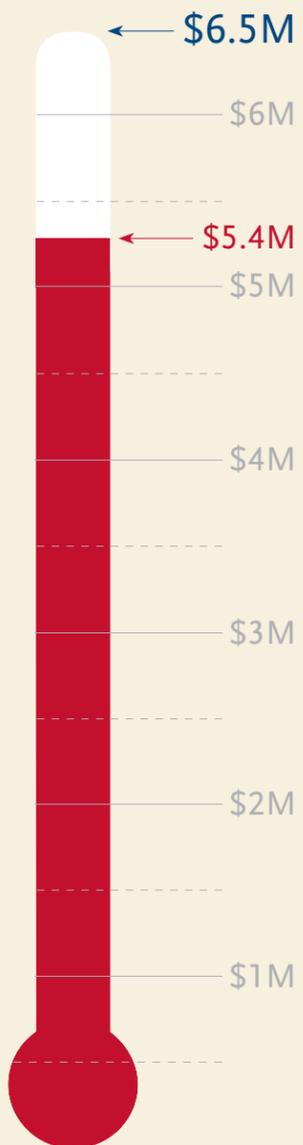
Income To-Date

Board of Trustees	\$ 2,163,000
Private/Public Foundations	\$ 2,750,000
Museum Members	\$ 387,000
Corporations	\$ 100,000
New Donations Needed	\$ 1,100,000
Total Income Goal	\$ 6,500,000

“There is no doubt that the educational, cultural tourism and economic development benefits to New Bedford from this project will be substantial. I applaud the Museum’s deep commitment to the revitalization of our city.”

— MAYOR JON MITCHELL

Help us meet our \$6.5M
Capital Campaign Goal



Campaign Supporters *As of March 2014*

Please join us in thanking these generous donors who contributed gifts in support of campaign initiatives to construct the Education Center & Research Library, strengthen long-term financial capacity, and build the endowment.

Community Foundation of SEMA - Jacobs Family Donor Fund	New York Community Trust - Wattles Family Charitable Trust Fund	An Anonymous Donor
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The Manton Foundation	National Endowment for the Humanities
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Nancy & Jack Braitmayer Cile & Bill Hicks	Massachusetts Cultural Council - Cultural Facilities Fund	Nye Lubricants An Anonymous Donor
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Babbitt Steam Specialty Co.	Patricia & Hon. Armand Fernandes, Jr.	Barbara Moss & Timothy Haydock
BayCoast Bank	Tally & John N. Garfield, Jr.	Nonnie & Frederic C. Hood
Community Foundation of SEMA - Acushnet Foundation Fund	Kate & Albert W. Merck	Holly & Joe McDonough
Barbara & Paul Ferri	Ambassador Richard L. & Faith Morningstar	Dorothy & Owen Robbins
Caroline & Lawrence Huntington	Estate of Patricia Nottage	Delia & James Russell
Estate of Betty Knowles	Capt. & Mrs. Robert G. Walker, USN
Marguerite & H. F. Lenfest	James Bevilacqua & Constance Bacon	DeMello Charitable Foundation
Nichols Foundation	Marsha & David N. Kelley II	MPD Higgins Foundation
Estate of Craig A.C. Reynolds	Hon. D. Lloyd Macdonald	Mariana & Edward M. Howland II
Edgenie & Donald S. Rice	Dean & Janet Whitla	Patricia A. Jayson
Norman & Maryellen Sullivan Shachoy	Mona & Robert Ketcham
Sloan & Hardwick Simmons	Pamela & Joseph Barry, Jr.	The Ludes Family Foundation
The Upstream Foundation	Mary Jean & Bill Blasdale	Susan & Albert Paladino
Anne B. Webb	Estate of Robert O. Boardman	Jeannie & Mason Smith
The Sidney J. Weinberg, Jr. Foundation	Ruth & Lincoln Ekstrom	Mickie & Clif Rice
An Anonymous Donor	Marilyn & David Ferkinhoff	

“You can just imagine the pleasure and satisfaction it gives us to be a part of this exciting project - and to see this new building grow to soon become a beacon for kids and scholars alike.”

— CAMPAIGN DONOR FROM WESTPORT, MA

Donor Recognition

Every gift is important and will be recognized in the Museum’s campaign report. All gifts of \$5,000 or greater will be recognized on the Donor Wall in the Education Center & Research Library.

Naming opportunities are available for all major spaces commensurate with the level of gift, including but not limited to:

New Exhibition Galleries in the Education Center & Research Library as well as renovated and expanded galleries in the main Museum complex

Roof Deck overlooking New Bedford Harbor

Entranceway Plazas on Johnny Cake Hill and Union Street

Landscaping expertly designed to accentuate the Education Center & Research Library and Bourne Building

State-of-the-Art **Educational Classrooms**

Main Foyer, Johnny Cake Hill entrance

Library **Reading Room Alcoves** to accommodate visiting scholars, researchers and volunteers

A new **Education Office Suite**

Named Endowments for the Curator of Education, Curator of Exhibitions, Librarian and the post-graduate Curatorial Fellowship Program

Sundial Building Foyer

“Casa dos Botes” for the visible display of whaleboats and other large artifacts