

# In the Green

## *Negotiating Rail Expansion in Somerville, MA*

### *Practitioner Guide*

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### Overview

A case study is a story about how a person or group of people faced and dealt with challenges or opportunities. It is based on desk research and interviews with key actors but does not provide analysis or conclusions. Written from the perspective of the protagonist(s), it is designed to raise questions and generate discussion about the issues they faced. Cases are meant to help participants develop analytic reasoning, listening, and judgment skills to strengthen their decision-making ability in other contexts.

A case-based conversation is a way to anchor a conceptual discussion to concrete examples. It can bring a case to life and allow participants to place themselves in the shoes of the case protagonist(s), while also allowing a variety of perspectives to surface. This guide is designed to help you lead a conversation about the case, “In the Green: Negotiating Rail Expansion in Somerville, MA.”

### Role of Facilitator

The facilitator leads the conversation with a clear beginning and end, ensures that everyone is heard, and keeps the group focused. The conversation can be broken into three distinct segments: exploring the case, applying the central questions of the case to your organization’s challenges, and formulating takeaway lessons. Some facilitation tips and tricks to keep in mind are below.

#### **BEFORE the discussion**

Make sure everyone takes time to read the case. Participants also have the option to fill out the attached worksheets to prepare themselves for the case discussion. When setting up the room, think about situating participants where they can see you and each other. Designate a notetaker as well as a place where you can take notes on a flipchart or white board. Plan for at least sixty to seventy-five minutes to discuss the case and takeaways and have a clock in the room and/or an assigned timekeeper. Mention that you may interrupt participants in the interest of progressing the conversation.

**DURING the discussion**

Encourage participants to debate and share opinions. State very clearly that there is no right or wrong “answer” to the case; cases are written so that reasonable people can disagree and debate different ideas and approaches. Be careful not to allow yourself or others to dominate the discussion. If the conversation is getting heated or bogged down on a particular issue, consider allowing participants to talk in pairs for a few minutes before returning to a full group discussion. Do not worry about reaching consensus, just make the most of this opportunity to practice thinking and learning together!

## Case Synopsis

When Joe Curtatone became mayor of Somerville in 2005, he planned to make good on his promise to bring rail transit to his constituents through the Green Line Extension (GLX). The city of Somerville and its residents had been fighting for transit access since the 1990s, and few thought it would ever become a reality. However, Mayor Curtatone worked with a coalition of nonprofits, residents, and city government departments through a participatory visioning process (“SomerVision”) that brought together over sixty organizations from different sectors of the city. Curtatone successfully kept the project eligible for a federal grant, merging a long-standing narrative of fairness and justice with an economic-development strategy.

By 2014-2015, though, the project was running over budget, and it was uncertain whether the Commonwealth of Massachusetts would continue supporting it. Curtatone negotiated with the state and agreed on simplifications to the original GLX, including a shorter route that would no longer directly benefit neighboring regional communities. When the Commonwealth announced a shortfall of roughly \$200 million, Curtatone again worked with neighboring cities to find a solution: Somerville paid \$50M, Cambridge \$25M, and the BRMPO diverted funding for the rest. The narrower GLX project was approved and construction began in May 2018.

This case is designed as the capstone case in a series of negotiation cases developed by the Bloomberg Harvard City Leadership Initiative. It is recommended for participants with some negotiation experience.

## Conversation Plan

**Part 1: Exploring the Case (15–30 minutes)**

The goal of this part of the conversation is to review the case from the point of view of the people involved. Suggested questions:

- *What was the story in the case?*
- *What did Mayor Joe Curtatone do well in your opinion?*
- *What would you do differently if you were in Curtatone’s position, and why?*

**Part 2a: Diagnosing Negotiation Challenges (15–30 minutes)**

This part of the discussion allows participants to analyze what Curtatone and Somerville were doing from a negotiation perspective, and why. The discussion section can be based on the following set of questions:

- *What groups of actors, or “coalitions,” formed in favor of building the Green Line Extension? What did they want to get out of a deal (positions)? Why did they want those things (interests)?*

- *Were there individuals or groups that formed coalitions as opponents, or “spoilers,” to the GLX? What did they want to get out of a deal (positions)? Why did they want those things (interests)?*
- *How did things change over time? What did Curtatone do to anticipate changes that could threaten the GLX?*
- *Why did Somerville, the Commonwealth of Massachusetts, MassDOT, and the Fiscal Management Control Board settle on the agreement they did?*

**Part 2b: Application** (10 minutes)

If time allows, participants may break into groups or remain in plenary to apply the concepts discussed to their own negotiation challenges. The following questions are a guide:

- *With respect to a major goal or priority of yours, who are your allies or coalition members?*
- *Who are your adversaries or deal opponents? Are spoilers present?*
- *How do you know you are negotiating well in this kind of multi-party setting?*

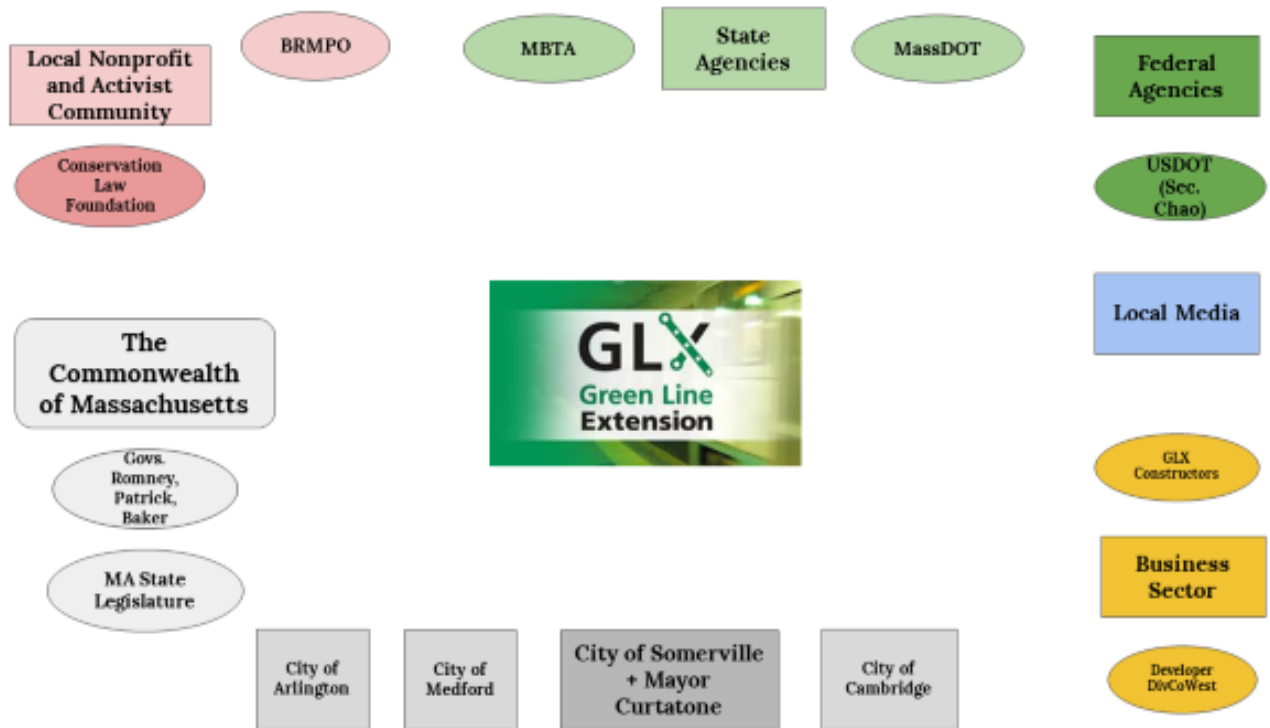
**Part 3: Formulating Lessons** (5–20 minutes)

This part of the conversation focuses on the lessons of the case that participants will continue to reflect on and apply to challenges in their work. Some sample, high-level takeaways to review after a productive discussion:

- In multi-party negotiations, coalitions of allies and adversaries are unstable, meaning that they change depending on different parties’ actions at different moments in a negotiation.
- To anticipate these changes, strong negotiators “map the table” by examining different parties’ views on multiple issues, sub-issues, and other negotiators.
- It is wise to take the initiative and scan for potential deal opponents or spoilers and strategize accordingly.
- Since every move or action has many consequences in a negotiation, intended and unintended, it is wise to examine these consequences and time actions accordingly (“sequencing”). Strong actions in a negotiation (“game-changing moves”) improve issues at hand for the negotiator, their allies, and their adversaries.

**Worksheet 1** Stakeholder Map

The figure below includes some major stakeholders in the GLX negotiation in Somerville. Draw a line between Mayor Curtatone and parties you believe want to build the GLX and are allies. Draw a crossed or hatched line between Curtatone and parties you believe are adversaries or do not want the GLX constructed. Draw a dotted line if the relationship is neither an ally nor adversary but could have been recruited to join his coalition.



**Worksheet 2** Green Line Party / Interest Matrix

The table below includes most major stakeholders in the GLX negotiation and space for listing the main interests in this negotiation. For example, interests could include access to rail transit in Somerville, environmental justice and fairness, and responsible budgeting. Fill out the matrix below, indicating what each party thinks about each of the issues and how much they care. This exercise helps “map the table” and can allow negotiators to see opponents or spoilers to a deal or on specific issues.

	Constructing GLX at all	Route & Terminus Location	Financing	Contractor Choice	Environmental and Social Equity Concerns
MBTA					
MassDOT					
FTA					
USDOT					

Commonwealth of MA					
City of Somerville, Mayor Curtatone					
City of Cambridge					
Private Developers					
Community Groups (i.e., Friends of the Community Path)					