

In the Green

Negotiating Rail Expansion in Somerville, MA

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It was November 2017. The phone rang, and Somerville, Massachusetts, Mayor Joe Curtatone answered it immediately. Curtatone waited with bated breath, as he had many times before, hoping for good news on the other end of the line. Numerous Somerville residents, officials, advocacy groups, and businesses had worked tirelessly for decades to bring rail transportation to their community. At this point, bad news meant there might not be a way to expand his constituents' access to rail transit.

When Curtatone first ran for Somerville mayor in 2003, he made a campaign promise to make the Green Line Extension (GLX) a reality. Opening in 1897, the Green Line was America's first subway, and it had remained a critical piece of the Boston metropolitan area's transit infrastructure.¹ It ended in East Cambridge, just short of the Somerville city line. Although the Boston area subway system, known as "the T," had expanded throughout the twentieth century to include the Green Line, Red Line, Orange Line, and Blue Line, bringing a rail or subway line to Somerville remained elusive.

Curtatone understood that financing and constructing public infrastructure, especially of the scale and complexity of the GLX, would be challenging. "Opposition to the Green Line was never specific people, but bureaucracy itself," he said.² Successfully implementing the GLX would be a massive exercise in coordination: billions of dollars, numerous federal, state, and local agencies, and complicated live construction sites that would require intense preparation and choreographing. And despite the best planning, unexpected challenges were sure to emerge. No matter how much financial or managerial progress stakeholders made toward implementing the GLX, it seemed like the whole project could fall apart at any moment.

Inside Somerville, Massachusetts

From the mid-nineteenth to the mid-twentieth century, Somerville was home to working-class Italian- and Irish-Americans who worked in heavy industry and manufacturing.^{3,4} "Somerville then would be unrecognizable today," said Mike Capuano, the city's mayor throughout the 1990s and a member of the US House of Representatives from 1999-2019 for Massachusetts. "We were the meat capital of the world in the 1870s, and we lost it to Chicago. But even in the [1970s], our sewers were full of a hundred years of animal product. No one I knew ever thought Somerville would be attractive to outsiders. Our goal was to stop people moving out."⁵

Starting in the 1980s, however, the Somerville community began to change. For one, the Red Line Extension, which extended subway service from Harvard Square to Alewife station in North Cambridge,

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led to gentrification, as new residents of the “creative class” increasingly moved to Somerville’s Davis Square.⁶ Later, the city—particularly East Somerville and the Union Square area—grew increasingly diverse, with an influx of immigrant communities from Portugal, Haiti, El Salvador, Nepal, India, and Brazil.^{7,8}

Despite these new residents, Somerville continued to be served by only one Massachusetts Bay Transportation Authority (MBTA) station, Davis Square, into the 2000s. That had not always been the case. “You cannot go into any public building in Somerville without seeing old pictures of the rail and streetcar. But both commuter rail and streetcar, by mid-century, that turned into a suburban thing. My father used to tell me stories about what Somerville *used* to have,” said Capuano.

In the early twenty-first century, advocates for expanded rail access to Somerville celebrated an early win. The construction of big box stores like Home Depot and K-Mart at Somerville’s Assembly Square in the late 1990s had prompted a group of citizens to form the Mystic View Task Force (MVTf), which advocated for mixed-used development on the site. The MVTf successfully sued developers for failing to follow the proper approvals process. A mediated settlement reached in 2007 included not only mixed use of the space, but also a new Orange Line Station at Assembly Square, first opened in 2014.

Talk of extending the Green Line into Somerville, however, had been dragging on for generations with little progress. It was first mentioned as a companion project to the infamous Central Artery/Tunnel Project (also known as “the Big Dig”).^{i, 9} “The Commonwealth of Massachusetts, in order to justify funding the Central Artery in their Environmental Impact Statement (EIS), proposed a series of transit mitigation measures, and this list of transit elements included a Green Line Extension, and more,” said Doug Foy, who served as President of the Conservation Law Foundation (CLF) for over twenty-five years. “We [the CLF] challenged the Commonwealth’s [Big Dig] project on environmental and air pollution grounds. You make it easier to get out of town, more people will drive, and traffic and pollution will continue. We advocated that the Commonwealth needed to make good on their *own* EIS and give people an alternative.”¹⁰ The CLF successfully sued the Commonwealth in 1990. Massachusetts pledged a GLX from Lechmere Station in Cambridge to West Medford, through the city of Somerville.¹¹ Yet when Curtatone was elected mayor in 2003, the GLX had yet to happen.

Mayor Joe Curtatone

Curtatone was passionate about extending the GLX and had framed his campaigns for public office—first for alderman, then for mayor—around it. He was energetic and ran toward, not away from, disagreements. He seemed to know everyone in the nonprofit and business communities and genuinely believed in grassroots popular democracy. Curtatone saw community stakeholders’ successes—like MVTf shaping development at Assembly Square—as evidence of the vital role grassroots organizing could play in creating the Green Line Extension. “There had become, I think, a growing divide over the years between ‘old Somerville’ and ‘progressive Somerville,’” said George

ⁱ The Central Artery/Tunnel Project (“the Big Dig”) is cited as one of the largest, most expensive, and most technically challenging transportation engineering projects in US history. Planning began in 1982, with construction in the 1990s and 2000s. The project replaced Boston’s Central Artery (I-93), which was formerly a six-lane elevated highway. I-93 runs through Somerville. The project created new underground highways, bridges over the Charles River, and extensions of I-90 (to Logan Airport) and Massachusetts Route 1A.

Proakis, executive director of the Mayor's Office of Strategic Planning and Community Development (OSPCD). "But the mayor cut right through that. He grew up in Somerville, in a family embedded in the city. But he [was] also progressive and young, understanding so deeply the forces of the city. He [could] peacefully exist in both worlds."¹²

In October 2004, nine months into his first term in office, Curtatone saw firsthand just how much democratic energy there was for a Green Line. He recalled a preliminary meeting with MBTA representatives and MassDOT, where several hundred people crammed into a school auditorium.¹³ It was the same year that the Red Sox made a historic comeback against the Yankees in the American League Championship Series to face the St. Louis Cardinals in the World Series, their first series win since 1986. Despite the historic game that night at nearby Fenway Park, stakeholders focused on the GLX. Describing that night, Curtatone said, "Everyone was engaged and determined, advocating for a commitment . . . We were there to listen and respond back."¹⁴

Representatives from the Commonwealth of Massachusetts were taken aback by Somerville's engagement and the turnout. The room could not fit the audience who came from all walks of life: the business community, advocates, and elected officials, among others. "I think that meeting was so important because it set the tone for years to come," said Curtatone. "We, the community—and Somerville—set the table for what they expected from us."¹⁵

Frustration with the state grew as it failed to make progress on commitments for the GLX. In 2005, the state proposed a Bus Rapid Transit alternative. Curtatone, then-Congressman Capuano, and hundreds of Somerville residents made their opposition known at a public hearing on the subject. One attendee told a local news outlet, "Somerville residents are not going away—they are not backing down from their concerns."¹⁶ Curtatone said, "Turnout at these meetings sends the state a clear message that Somerville means business, that we are united in our desire for this Green Line Extension."¹⁷

Meanwhile, the Conservation Law Foundation sued the state for stalling the GLX and other mass transit projects. They settled the lawsuit in 2006 with set deadlines for each project, including a complete GLX through Somerville and to West Medford by 2014. Nevertheless, the state repeatedly postponed the project.¹⁸ Years of legal battles and broken promises were leaving people frustrated and skeptical that the GLX would ever happen. Curtatone needed to channel the enthusiastic energy of his city toward a common vision rooted in access to public transit.

SomerVision 2030

Across the US, there was a patchwork of rules and statutes that mandated whether communities must create "general plans" or "comprehensive plans." States like California required general plans, which were interdisciplinary, community-based, and usually articulated a broad framework for cities' planning, development, and growth.¹⁹ Massachusetts was known as a "non-planned state" because it did not require cities to craft general or comprehensive plans.

Still, four years into his tenure as mayor, Curtatone began SomerVision 2030. He recalled, "We needed a way to articulate a comprehensive planning process in Somerville going forward. We needed to figure out, as a community, who we want to be when we grow up, and make a plan for where we want to be in 2030."²⁰ A twenty-year comprehensive plan was born.

“When you think about how Massachusetts did not require this, nor did it require comprehensive plans to have the teeth to connect to zoning and land use rules and a city’s capital plan, it is amazing that Mayor Curtatone had the foresight and political capital to do this and get ahead of these issues,” said Brad Rawson, who served as a project manager for SomerVision and worked in the mayor’s office.²¹ SomerVision did not have the teeth to change zoning, land use rules, and capital planning, but, according to Rawson, the plan allowed the city to grapple with big community changes in a participatory way. It addressed key issues, including smoothing “booms and busts” after an overheated real estate market (2003-2007) and the Great Recession (2008-2010), gentrification, and increasingly unaffordable housing and displacement. “The writing was on the wall: our community needed more equitable transit-oriented development, and this would be central to our vision,” Rawson said.

Curtatone and his team knew that metropolitan transportation projects had failed in the past, not because of a lack of federal or state support, but due to local community opposition. In nearby Arlington, Massachusetts, local opponents had stymied the Red Line’s expansion beyond Alewife in the 1970s. At the time, Arlington’s selectmen failed to unify community groups; the faith community set the narrative and defeated the proposal by referendum.²²

Arlington had tried to educate the public and encourage solutions-oriented deliberation about the Red Line and one way was forming a Citizen Involvement Committee (CIC) on the expansion.²³ Opposition to the project, however, united residents concerned about noise and “certain urban elements entering their quiet suburban town.”²⁴ Arlington Town Manager Adam Chapdelaine referred to the Red Line Extension as “a really unfortunate chapter in Arlington’s history . . . Had the Red Line terminated or had a stop in Arlington, it would be more vibrant. But I do think, since those times, Arlington has changed super dramatically. But there is still very much a loud, active group in Arlington averse to development, and change. They lean on [terms like] ‘community character’ and ‘history.’”²⁵

In contrast, Curtatone brought citizen groups into the fold and invited them to envision how the Green Line would help the community, making the GLX a central theme in SomerVision. The plan’s narrative was one of inclusive and equitable growth.²⁶ Public investments like the GLX could help communities access jobs and opportunities, and good planning around housing and public space could help protect small businesses and local communities from displacement. The plan considered everything from the environment to workforce and education issues, infrastructure, and regional planning.²⁷

Somerville did not have a large or flexible budget. While other cities might have brought on consultants to write such a forward-looking document as SomerVision, Somerville opted instead for direct community participation. Curtatone worked to include activist nonprofits, diverse social service agencies, special-interest groups, chambers of commerce, new business advocacy organizations, and more. He created the SomerVision Comprehensive Plan Steering Committee, a governing congress with over sixty entities from across sectors. The goal was to have community leaders focused on economic development, affordable housing, anti-poverty, and open space—and community services involved so no stone was left unturned, recalled Rawson.

One of SomerVision’s key community groups was a consortium group called “Friends of the Community Path.” That organization alone had dozens of member affiliates.²⁸ The group’s goal was to link existing bicycle and pedestrian paths in the Greater Boston area to create nearly fifty miles of a

continuous community path, increasing modes of transport beyond car and mass transit.²⁹ Through SomerVision, they paired their goal with the GLX and charted out potential routes where the path could be incorporated into the GLX plans.

Curtatone convened the steering committee for nearly three consecutive years until the plan's adoption in 2012. "Every time there was stakeholder fatigue, Joe would get up and say: 'stay the course, keep our volunteers engaged, this cannot be top-down,'" Rawson said. In the end, SomerVision was far from top-down. Grassroots communities were especially empowered in the document; community groups were central to crafting 586 unique goals and policies across myriad policy issues.³⁰

During the SomerVision process, MassDOT revised the GLX plan to divide the project into two phases.³¹ The route itself, originally slated to go through Somerville into West Medford and end at an intermodal station with commuter rail connections, would now be shorter. The new extension would eventually end at the Route 16/Mystic Valley Parkway and be built in two distinct construction phases. (See Appendix 1.) Phase I of the project, constructed first, would terminate at College Avenue and include all the planned Somerville stations. Phase II would later extend the line to Route 16/Mystic Parkway.

SomerVision was a clear statement of community values. Curtatone submitted the document to the board of aldermen for a formal endorsement vote, and the plan was adopted as the official comprehensive plan for the city of Somerville in April 2012.ⁱⁱ The final SomerVision document featured extensive and specific GLX neighborhood expansion plans: "The GLX brought us to [SomerVision] and sustained us through it," said Rawson, implying that the GLX both motivated SomerVision and provided direction for the community. By the end of the SomerVision process, Curtatone could draw on the active engagement of over sixty groups from across sectors in Somerville. He knew, in broad strokes, what the community wanted, what they did not want, and why. He also knew that he needed to take his fight for the GLX beyond Somerville.

The NewStarts Grant and Full-Funding Grant Agreement

Financing and approving the GLX project would require federal support from the US Department of Transportation and Federal Transit Administration (FTA), which would take the form of a Full-Funding Grant Agreement (FFGA). Coming out of the multi-year SomerVision process, Curtatone and his team were optimistic about achieving the agreement. For Democratic Governor Deval Patrick, who served Massachusetts from 2007 to 2015, transit and public-infrastructure expansion were express policy priorities. Curtatone and Patrick also had an ally in President Obama's cabinet: US Secretary of Transportation and former Mayor Anthony Foxx. As mayor, Foxx had fought for and secured rail expansion in Charlotte, North Carolina in the aftermath of the 2008 financial crisis.

ⁱⁱ In February 2019, the Somerville Board of Aldermen made a charter change to their name and were thereafter called the Somerville City Council.

Somerville's grant would come from the NewStarts division of the FTA.ⁱⁱⁱ NewStarts grants were typically very competitive: projects from metropolitan areas across the US competed annually for a fixed pool of resources for transportation projects, and only the highest-ranked projects were awarded support. For the grant review, the MBTA and MassDOT completed a risk assessment of the GLX plan and site for the FTA.

Red flags started to emerge out of the risk assessment. "It soon became clear that there were some issues," said Proakis. "MBTA and MassDOT would only talk about the assessment in vague levels, but they wouldn't give us a copy of it. We always thought our relationship with MBTA would be collaborative, ongoing, and a great one. But this was concerning." The city filed a Freedom of Information Act (FOIA) request for documentation about the risk assessment of the transit project.

The documents, released because of the FOIA request, revealed concerns with the Union Square area. According to Proakis, MassDOT and the MBTA identified about a dozen issues that could delay project delivery. The document identified one area, a brownfield industrial site near Union Square, as "high risk." An extremely polluted scrap metal dealer owned the site that abutted the proposed GLX track bed. The MBTA had proposed building transit infrastructure, a station, and a train storage facility there, but the Commonwealth's process to acquire private sites was slow. Furthermore, they were only permitted to acquire what was absolutely necessary to complete their infrastructure. "In this case, the MBTA was considering acquiring a portion of the scrap yard, relocating the piles onto the remainder of the scrap yard, and opening a beautiful new MBTA station next to a polluted scrap metal facility. At the same time, delivering this infrastructure on time was a risk for the project. We knew that the city could complete this land acquisition faster and produce a better outcome for all," said Proakis.

Working on Multiple Fronts

Curtatone knew that failing to receive NewStarts funding could spell doom for the GLX project. He also knew that the Commonwealth of Massachusetts had major concerns about acquisition and cleanup of the Union Square site. So, the mayor took matters into his own hands. He gathered his staff and proposed a new way to talk about the motivations and messaging behind the GLX project, from one about equity and environmental justice to a project that also supported economic development.

Somervision included language on equity, sustainable growth, and local jobs. The Green Line was tied to both: "We met with the Commonwealth and later with stakeholders active in Union Square, as well as the state delegation representing Somerville. And they agreed. There was a lot of buy-in for this. People wanted to get the GLX built. And without the GLX, no economic plan would be realized for Union Square," said Curtatone.³²

ⁱⁱⁱ The Federal Transit Administration (FTA) NewStarts grant process helps the administration rank top projects for funding. The most competitive projects across all US metropolitan areas are funded with Full-Funding Grant Agreements (FFGA). The FTA believes project evaluation based on existing conditions provides the most easily understood, reliable, and readily available information for decision-making, so all NewStarts grants calculate using current costs and conditions, not future projections. The FTA uses comparative measures that examine absolute cost and benefit across cities and metro areas. More about NewStarts awards at: <https://www.transit.dot.gov/sites/fta.dot.gov/files/docs/NewStartsPolicyGuidance.pdf>

The mayor proposed a new process for a “Union Square Revitalization District,” including preparation of an urban renewal plan under Massachusetts law. The plan would provide the city greater flexibility in parcel acquisition and site assemblage to reduce risk for the GLX project. It would also improve coordination of private development with other public infrastructure needs such as sewer, storm water, and roadway reconfiguration.³³ “The Union Square conversation came in at my suggestion: I realized that we needed to add in another angle on the narrative. . . . We needed focus on jobs, jobs, jobs,” said Curtatone.³⁴ In late 2012, the city formally adopted the Union Square Revitalization Plan, and the Massachusetts Department of Housing and Community Development formally approved it under Massachusetts law.

Starting in early 2013, Curtatone strategically leveraged his economic development case for the Green Line to justify \$10 million from the city of Somerville; the money funded Somerville’s acquisition costs to purchase the polluted scrapyard on the site of the planned Union Square station.³⁵ His appeal was grounded in the projected future growth of property-tax revenue in the area, which would more than cover the \$10 million cost. The city’s board of aldermen approved the proposal.³⁶ The scrap metal yard was relocated to nearby Lawrence, Massachusetts. “We took that opportunity because we had to . . . we took a position of strength. We were going to have Green Line stations in the ground, and a lot would happen because of it. It made sense; it was a great argument,” Curtatone said.³⁷

On the heels of SomerVision’s community-oriented focus, advocates were frustrated that they could not actively shape the vision for Union Square, since the area was fast-tracked as a revitalization district and the Somerville Redevelopment Authority moved quickly to acquire the parcels. Union Square residents expressed concern that the Somerville prioritized “development over people” in the planning process, citing the revitalization district designation, which prioritized early conversations with developers. They formed the active Union Square Neighborhood Council (USNC), a group that often brought to light concerns about Somerville becoming unaffordable.

Mayor Curtatone agreed that the city had gotten it “backwards” in Union Square but noted that the only way Somerville could have financed the acquisition of the industrial parcels was by declaring the area a revitalization district: “With Union Square’s redevelopment, we knew there would be loss. . . . Normally, we would have done the neighborhood plan first, but without doing it the way we did, we wouldn’t have been able to secure the site, and the GLX may not have been a reality. It couldn’t happen the other way. I worry we lost credibility with the public, which is tough to build back, but we continue to work together toward our common goal.”³⁸

At the same time, the mayor’s urgency was clearing the way for both a federal grant and state approval before the end of the Patrick administration. In coordination with Secretary Rich Davey, Curtatone and his team worked around the clock to get approval. They got essential help from federal actors, including Capuano in Congress: “I was able to bring money, authorization, impact, influence, and pressure on the state—I told them to not walk away from it,” said Capuano.

It took eighteen months of direct engagement with the FTA, Secretary Foxx, and even President Obama, but by December 2014, the FTA had committed to executing the FFGA.³⁹ Those eighteen months involved an intense negotiation largely out of Curtatone’s control. But the mayor had done his part to position the GLX as a viable project, and shortly after the FFGA was approved, Secretary Foxx

visited Somerville and showed enthusiasm about the project. “We are proud to support projects like this one because when you connect people to more jobs, education, and medical care, you create the ladders to opportunity that strengthen families and the communities in which they live,” Foxx said during the visit.⁴⁰ The FTA approved nearly \$1 billion to support the rail extension.⁴¹

Avoiding an Unforeseen GLX Disaster

With federal support secured, MassDOT moved on to confirm state funding and begin the process for hiring contractors, designers, and engineers in the final days of the Patrick administration. During this time, Charlie Baker, a Republican, was campaigning for governor in outlying suburban communities.

Although Curtatone did not support Baker’s campaign, he did talk to him during his race. “When Baker was still a candidate, we met,” Curtatone said. “I had a hint he might win but didn’t know for sure. So, I wanted to set the terms already, for the project. I said to him: ‘I can’t be with you in this race . . . but if you win, I’ll work with you, and we can do this.’”⁴² Baker narrowly won and took office as governor in January 2015. To many people’s surprise, Baker supported the GLX project after taking office.

In the Patrick administration, Secretary Davey had pioneered a contracting approach known as Construction Manager/General Contractor Project Delivery (CM/GC).^{iv} He did it in part because it allowed for speed and community engagement, which were priorities for Curtatone. “We talked internally about a contracting method. Our goal was speed without degrading quality,” said Davey. “CM/GC was the choice, even though the MBTA was nervous about this method because it was new. But I thought we should try something new. This could push our schedule and time quickly.”⁴³

MassDOT lobbied for special legislation to run a CM/GC contract because Massachusetts statutes did not permit this method. Although the contract went ahead successfully, issues surfaced immediately. “For one, the MBTA didn’t have the right internal capabilities to manage the project. And, it turned out the contractor we hired to help was overly optimistic about their capabilities, too,” said Davey.

Shortly after Governor Baker took office, it became apparent that the CM/GC contract presented numerous challenges. Cost estimates for the project ballooned, timelines elongated, and there were major areas of disagreement with key local stakeholders about the design. For example, even though Friends of the Community Path had been central advocates for the GLX, and their goals were clearly articulated in SomerVision, the Full-Funding Grant Agreement did not include an extended multi-use Community Path that would run the length of the GLX in Somerville for bikers and pedestrians.⁴⁴ Groups like Somerville Transportation Equity Partnership (STEP) were similarly vexed: “These designers wanted fancier stations. We [could not] care less about grandeur in the stations. But we did need wheelchair accessibility and the courtesy of being able to use the GLX along with a walking path,” said Wig Zamore, co-founder of Mystic View Task Force and Somerville Transportation Equity Partnership.⁴⁵

In early 2015, multiple snowstorms hit the Boston area, shutting down entire sections of the T. In response, Baker formed the MBTA’s Fiscal Management Control Board (FMCB), which, Baker wrote,

^{iv} According to the US Department of Transportation, the Construction Manager/General Contractor (CM/GC) project delivery method allows agencies and constructors to actively engage the public during the design process to provide constructability input. More here: <https://www.fhwa.dot.gov/construction/cqit/cm.cfm>.

“shall have all power, responsibilities, and obligations of the MBTA board.”⁴⁶ The FMCB was granted authority to initiate and implement “appropriate measures to secure the fiscal, operational, and managerial stability” of the MBTA for a five-year term.⁴⁷ Thus, the FMCB had authority over the GLX.

A December 2015 “after-action” report prepared by the Berkeley Research Group and ASCENT detailed how and why the contracting model did not work.^{48, 49} The MBTA’s staffing model was one key issue: there were only four full-time MBTA staff; the rest were outside consultants hired as additional staff who charged high fees for their time. This increased costs, failed to retain institutional knowledge at the MBTA, and reduced focus on progress, performance, and risk. “In essence there were too few trained, in-house MBTA employees with too little authority to advance the project,” said Rawson.

“They had no choice but to outsource and to assign external consultants as if they were adjunct staff. I remember meetings where there were ten short-term consultants, and one staffer. I remember thinking: ‘this is now a \$5,000-\$10,000 meeting!’” said Rawson. Indeed, during this time, the MBTA was spending \$1 million a month on external consultants alone.⁵⁰ Overall project costs, which were originally estimated at \$450 million in 2005, ballooned to \$900 million by 2009, then to \$1.3 billion in 2011, and finally to over \$2 billion by December 2014.⁵¹

Reconfiguring the GLX Management Structure

FMCB asked Curtatone to testify before them regarding the GLX project. FMCB Chair Joe Aiello understood there were significant pressures to cancel the project because many other demands were being placed on the agency: “There was a sense that the T had drifted from its mission, from running well and maintaining well. There was a concern that we were always falling in love with the next shiny thing. There was this sense that expanding the system was contrary to the focus on fixing and running well. And even with the FFGA, we were repurposing another \$1 billion of our own money to expand. There were human-capital concerns: Did we have enough good people to manage this?”⁵²

By August 2015, the GLX estimate had risen to \$3 billion, nearly \$1 billion more than estimated in the FFGA, and the MBTA decided to terminate the contract.⁵³ Persuaded by the advocacy of Curtatone and others, the MBTA decided to start over and try again. The 2016 after-action report explained the choice to bring on the new contracting and implementation team, incentivized by a different decision-making structure.⁵⁴ This contracting approach, more traditional and less risky, was endorsed by the Baker Administration and called “Design/Build.”^v

While many were happy the GLX project would proceed, some stakeholders were frustrated that the Design/Build approach cut back features of the extension. Frederick Salvucci, a senior lecturer at the MIT’s Center for Transportation and Logistics, reflected on the tradeoff between the project moving forward and conditions set by the Baker administration: “[Curtatone and Capuano] reasoned that there would be no community path or transit-oriented development if there was no Green Line Extension, so they had to put first priority on securing the extension.”⁵⁵ Davey explained: “This stuff is complex, and something had to give. But the new administration had to cut back scope. For example, stations were

^v “Design/Build” is a traditional contracting approach for construction projects that appoints a designer on one side and a contractor on the other. Design/Build procurement then channels concerns through a single decision-maker, with a goal to reduce risks and overall costs. With the GLX, that decision-maker was Project Manager John Dalton.

eliminated and substituted for ‘canopies shelters.’ We thought rail stations were important components to a light rail extension in a dense, urban environment like Somerville.”

Simplifications brought down the projected budget, and the project now seemed feasible, if not ideal. But there were still sacrifices to be made. It was unclear, for example, whether the Community Path Extension would run all the way to the new Lechmere station in East Cambridge or whether it would terminate further north in East Somerville. The station redesign at Lechmere was moved across the street and greatly simplified.⁵⁶

Bringing Allies on Board

Through it all, Curtatone maintained relationships and stayed focused on the larger goal. Arlington Town Manager Adam Chapdelaine recalled that Curtatone sent letters to neighboring Medford and Arlington and advocated throughout for shared regional transportation priorities. Curtatone met regularly with local nonprofits. He chatted often with Doug Foy and Rich Davey and met with Governor Baker’s Secretary of Transportation Stephanie Pollack. “He moved to expand his coalition to include folks in Boston and the Chamber of Commerce,” Aiello said. “He and staff from the CLF met with us and reframed the debate to be about whether the MBTA could really return \$1 billion to Washington. What would it mean for our reputation of being able to do big projects like this? He brought in the public perception element. It was very persuasive.” Curtatone’s core base was not thrilled with this simplified version of the GLX project, but outright opponents never formed, either. As time ticked on, the GLX was getting closer and closer to breaking ground.

In addition to simplifications, the Commonwealth needed help financing the GLX. The MassDOT board proposed that Somerville pay between \$100 million and \$150 million for the project. Curtatone knew that Somerville was a small city, and that such a commitment would mean major sacrifices and tradeoffs across the budget for years to come. “I turned to the BRMPO [Boston Regional Metropolitan Planning Organization] and said, ‘look folks, we’re regionalists. We’ve supported everyone here, not just with specific projects, but because of how we value transportation mobility,’” recalled Curtatone.⁵⁷

The mayor had supported the BRMPO and the board’s many municipalities through direct advocacy for regional-transportation mobility for years. Whether it was supporting an intersection redesign in Quincy or something larger, he had been consistent in his values and commitments. Said STEP’s Zamore: “[Back in the 1990s and 2000s], I went to every single BRMPO meeting. My goal was to figure out regional transport and its relationship to the environment. Back then, Somerville had not had a single transportation improvement project funded or executed in decades. The city had lost its ability to get transport money from the region and state. That changed with Curtatone.”

Zamore watched as Curtatone took the BRMPO board more seriously. Slowly, over time, Somerville used its board seat to align with member cities. In 2016, Curtatone went before the board, and advocated that the BRMPO transfer \$150 million of highway funding for an intermodal transport hub in West Medford, so that commuters could connect off the Commuter Rail and hop onto the Green Line.⁵⁸ He also advanced a second proposal, for BRMPO members to support the Green Line’s Phase II, the part of the project terminating at Route 16. The board approved, diverting regional highway

funds.⁵⁹ They justified the diversion because the GLX would terminate near the highway, and its construction could divert automobile traffic.

A Financial Showdown

By early 2016, negotiations over these simplifications were complete. But there was one more problem. The Baker administration, Aiello and the FMCB, and MassDOT's Board of Directors announced an additional funding shortfall between \$200 million and \$300 million.⁶⁰ Curtatone believed that the Baker administration wanted cities and local stakeholders to contribute additional financial support for the GLX project, since they would be its primary beneficiaries.⁶¹

After hearing about the shortfall, Curtatone met with the FMCB and MassDOT board as well as local allies and advocates like Cambridge City Manager Rich Rossi.⁶² Most critically, he spoke directly with Governor Baker. But the Commonwealth still wanted the municipalities to contribute to the GLX. In May 2016, after months of additional negotiations, Curtatone hammered out an agreement.⁶³ Somerville and Cambridge would jointly pay \$75 million for the Green Line. Somerville would pay \$50 million in raised revenue, which would require approval from the board of aldermen, and Cambridge agreed to provide \$25 million through developer fees.⁶⁴ The primary developer paying for the project was DivcoWest, whose North Point development project stood to benefit tremendously from the increase in property values that would occur because of the GLX.⁶⁵

Somerville's Board of Aldermen agreed to support the funding increase, to be paid out over a period of five years.⁶⁶ Curtatone, the FMCB, and MassDOT finalized the agreement. "The Commonwealth got what they wanted: they set a precedent for expectations with the state," Curtatone said. "We negotiated other infrastructure demands. There was a lot more than the GLX that we got in the agreement. It saved us maybe \$100 million over decades. Still, it was a lot of money we had to swallow."⁶⁷ For example, the city argued that it should be permitted to construct connections from its local drainage system into the new MBTA drainage system included in the GLX project. After appropriate engineering and legal due diligence, the MBTA and the city signed an agreement memorializing these drainage rights. This represented an important benefit to the city that helped earn the support of the board of aldermen to approve the \$50 million GLX contribution. Media headlines announced the agreement far and wide.⁶⁸

Yet another loose end concerned the BRMPO board. Curtatone's advocacy with the BRMPO had supported Phase II infrastructure to Route 16/Mystic Valley Parkway, but the mayor now needed to return to the board to encourage them to divert money away from the planned Phase II project and toward the Somerville-focused Phase I.⁶⁹

"We said to Curtatone: 'Let's really make sure they're forcing this before we give up this money.' I thought to myself at the time: 'If we move this money, we may never get Phase II money back,'" said Arlington's Chapdelaine. Chapdelaine was right. Curtatone told the board there was no other option, and the MPO board moved Phase II money to Phase I. Phase II action would not yet move forward. Some nonprofit advocates were skeptical Phase II would ever break ground.

In November 2017, when Curtatone's phone rang, Joe Aiello was on the line. The FMCB had voted unanimously to approve the Phase I proposal and officially awarded the design and construction

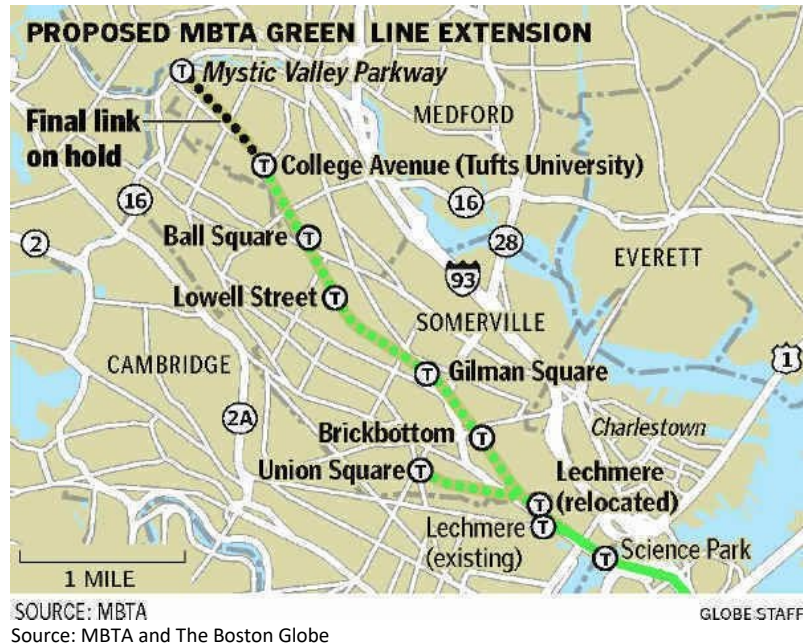
contract to GLX constructors.⁷⁰ The final package was \$2.3 billion, and included twenty-four new train cars, seven station-stops terminating at College Avenue in Somerville, and community path extensions throughout the full length of the city.⁷¹

Curtatone could not believe his ears, but he was not ready to declare the GLX a victory until the project was completed. This process had taught him that unanticipated challenges could emerge at any moment. With Phase I funding secured, what else would it take to get Green Line trains rolling through Somerville?

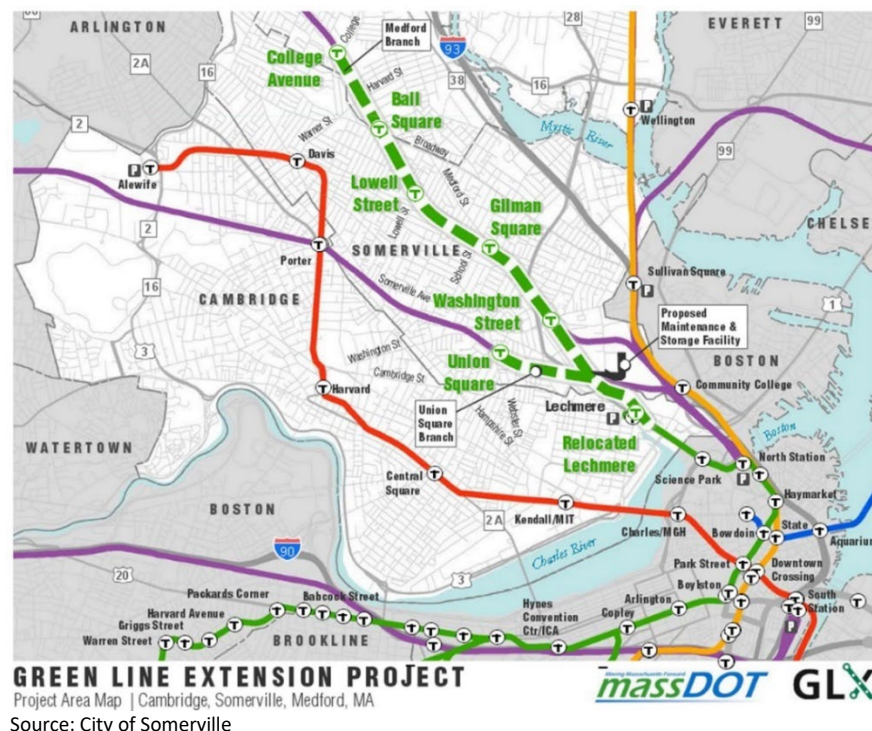
Appendices

Appendix 1 Maps of the (Proposed) Green Line Route

This map shows both phases of the route proposed through to Route 16/Mystic Valley Parkway.



This map shows the route of the negotiated GLX project as of June 2018, including the relocated Lechmere Station, Union Square Spur, storage and maintenance facility, and College Avenue terminus.

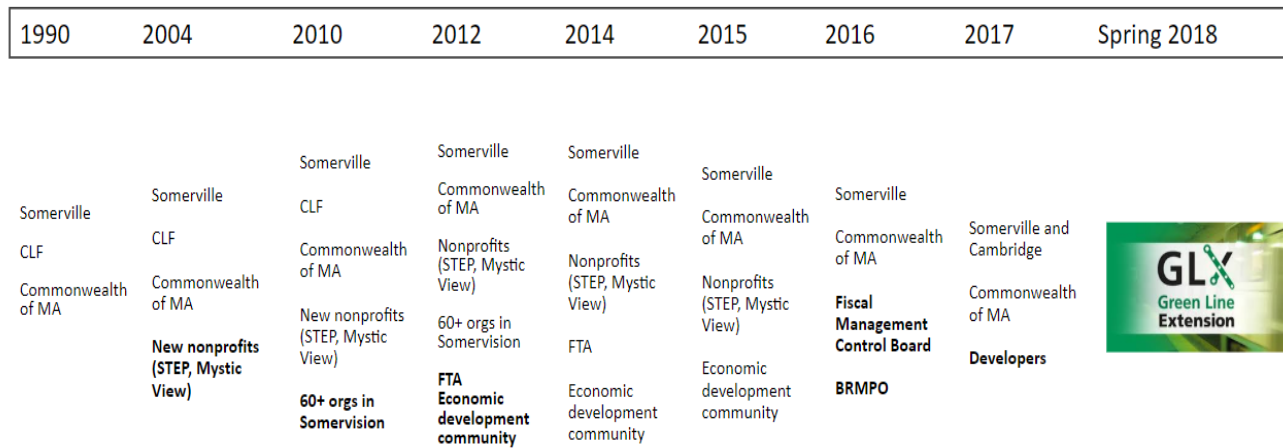


Appendix 2 Timeline of Select Events

- 1990:** The Conservation Law Foundation (CLF), a legal advocacy group, successfully sued the Commonwealth of Massachusetts because the Commonwealth had promised to include alternative transportation measures in original “Big Dig” project plans, including a Green Line Extension (then-estimated cost: \$498-\$600 million).
- 1990s -early 2000s:** Mike Capuano served as mayor throughout the 1990s and ran for Congress serving from 1999-2019; Dorothy Kelly Gay served as mayor from 1999-2004; Mayor Joe Curtatone served as a city alderman for eight years and became mayor in 2004.
- Oct 2004:** An estimated 500 people turned out for a Green Line Extension public hearing—the same night that the Boston Red Sox won the World Series.
- 2005:** CLF sued the Commonwealth of Massachusetts for stalling progress on mass transit projects, including the Green Line Extension.
- 2006:** CLF lawsuit was settled, and December 2014 deadline was set for the Green Line Extension.
- 2008:** Mayor Curtatone began a three-year comprehensive planning process for SomerVision 2030.
- 2009:** MassDOT divided the GLX project into two phases, with the first ending at College Avenue and including all planned Somerville stops. Phase II would extend the Green Line to Route 16/Mystic Valley Parkway.
- 2012:** The city of Somerville adopted SomerVision 2030. The Massachusetts Department of Housing and Community Development formally approved the Union Square Revitalization Plan.
- 2014:** Federal Transit Administration (FTA) committed to the Full-Funding Grant Agreement (FFGA) for the GLX.
- Early 2015:** Charlie Baker took office as governor of Massachusetts. Baker shut down MBTA operations after multiple snowstorms and formed the Fiscal Management Control Board (FMCB).
- Nov-Dec 2015:** Mayor Curtatone advocated before the Boston Regional Metropolitan Planning Organization (BRMPO) board to divert \$150 million of highway funding to the Green Line for Phase II construction.
- May 2016:** Governor Baker announced additional financial shortfalls of \$207 million. Curtatone, Cambridge City Manager Rich Rossi, and the Commonwealth agreed on a \$75 million contribution package (\$50 million from Somerville and \$25 million from Cambridge) for the project. The BRMPO board agreed to divert the money from the regionally focused Phase II to the Somerville-focused Phase I.
- Nov 2017:** The FMCB and MassDOT boards unanimously approved the plan with a Design/Build contracting approach, and awarded the contract to GLX Constructors, even though elements of the project, including an extended line beyond Somerville to Route 16, were pushed back to a “later phase.”

Appendix 3 Dynamic Deal-Driving Coalitions Over Time

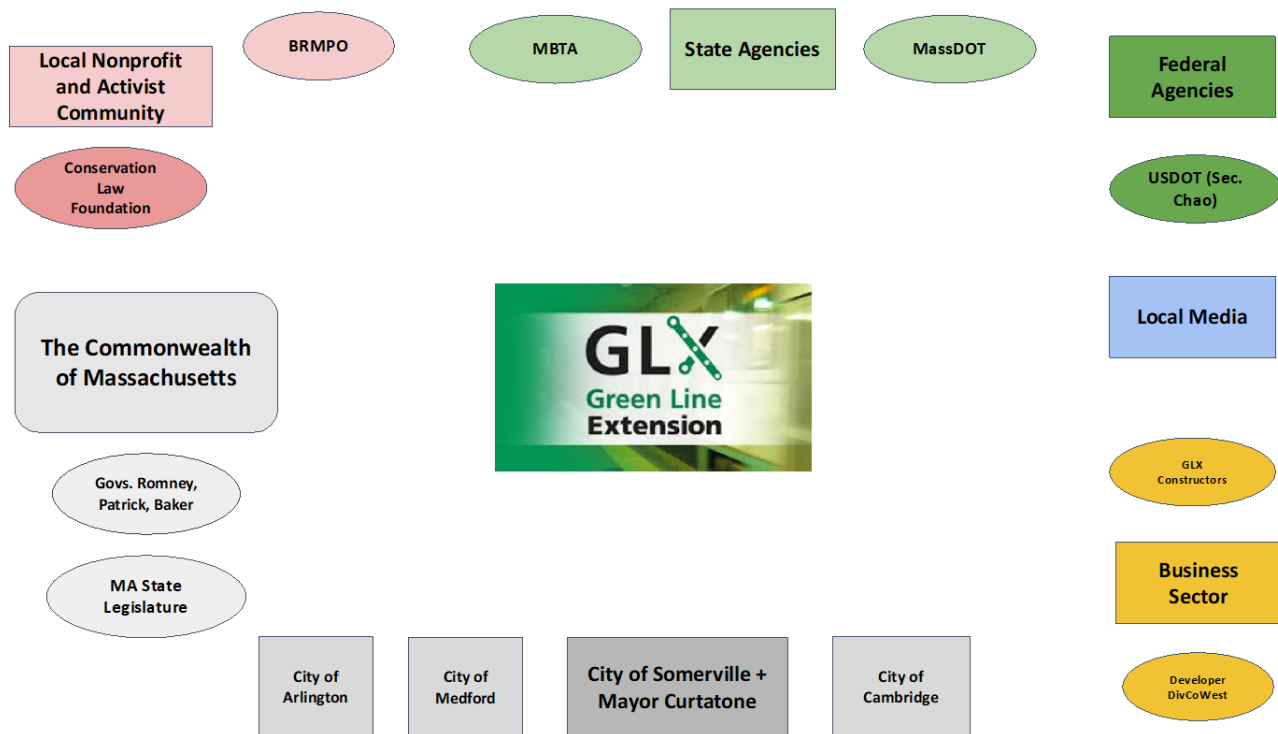
The chart below illustrates the number of individuals or organizations key to advancing the GLX at different moments in the negotiation, all members of the GLX “deal-driving coalition.” Curtatone and key allies chose at times to “broadcast” and include a range of parties in the deal-driving vision, and at other times “narrowcast” and engage a smaller number of groups.



Source: Case authors

Appendix 4 Green Line Party / Issue Matrix

Issues Parties					
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)					

Appendix 5 Simplified Green Line Extension Negotiation Stakeholder Map created by case authors

Endnotes

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