

Union United - strategy & such

draft of proposals for 27 September steering committee meeting

last updated 26 September 2015 – Gary Trujillo (gst@webruary.org)

Introduction

We in Union United are now launching a new phase of our activities during which we are coping with new challenges brought about by what appears to be a better developed and more aggressive strategy now being deployed by city government and those organizations and persons hired by city officers to lead, manage and assist with the planned development process in Union Square (which we expect will be replicated elsewhere in the city). Led by a steering committee, we have now recognized the need for a well-formulated strategy of our own. This document is an effort to help us start thinking about what elements to incorporate into our strategy, and to understand how strategy relates to a few other important considerations (goals, objectives and tactics), so as to be as clear as possible, both in our thinking and in our communicating with one another and with those with whom we must engage as we pursue our goal of preserving and protecting what we value during the development process.

Goal, Mission, Vision, Objectives, Strategy & Tactics

Before we can start talking in a meaningful fashion about what we propose to do to deal with the challenges we face, we require a well-defined common terminology which accords with that used in project planning efforts of academic and business entities. The following page offers definitions for some of the terms we will be using in devising and thinking about working on getting the results we want to come out of our joint efforts.

Many people appear to not distinguish between goals and objectives or between strategy and tactics - or else they have somewhat “fuzzy” ideas about them (as well as the meaning and value of “mission” and “vision” statements). We can, therefore, easily be forgiven for not having clear ideas as to what we mean when we use these terms ourselves. Adding to the difficulty is the fact that different organizations have established their own definitions for these terms. No attempt is being made here to state that the definitions presented on the following page are “correct” in any important sense. Rather they are intended as a means to allow us to be clear in speaking among ourselves when we use these terms.

Motivation

In general membership and steering committee meetings, we have been employing terminology in a way that is somewhat inconsistent and potentially confusing. We have talked about having “goals” such as getting a certain amount or percentage of affordable housing stock and about our community benefits agreement representing a “strategy.” However, when we look at the definitions for these terms coming from those who use them routinely in achieving real results, we find that the first of these is really best classed as an “objective” - something we hope to achieve in support of a more general goal, and that, in fact, the CBA itself is a good statement of many, but not all, of our objectives (which provides a detailed description of the objective just mentioned), which in turn are aimed at achieving an overall goal. Also, being able to distinguish between strategy and tactics is extremely important, for reasons set out below.

Being able to agree on terminology and to use it consistently will surely enable us to communicate more effectively, and to spend more of our time and energy on doing what we agree needs to be done.

“vision,” “mission,” “goal” and “objective” – from [University of Maine Extension Program](#)

goal: *A group goal is a broad statement of something that the group expects to attain or achieve. Goals may be short, intermediate or long-term in nature. Well-written goals are believable, attainable and based on identified needs.*

example: "Union United seeks to preserve and protect what we value about Somerville in general and the Union Square area in particular. We want development to proceed only with the genuine advice and consent of the Somerville community, and that it benefit to the greatest extent possible those presently living, working and running businesses in the area, while permitting some development that is in keeping with the city's objective of broadening the tax base and that provides additional benefit to the area and the city as a whole. We want what development is done to proceed in such a way that best accords with the needs and desires of current residents of the city, and that future generations will be able to adapt what we have left them to best suit their needs, some of which we cannot fully anticipate."

objective: *Objectives are statements of specific, measurable and attainable outcomes that contribute to the achievement of a particular goal.*

example: adoption by the city and planners of a binding community benefits agreement (CBA) that contains as much as possible of the language we have devised representing what we feel to be important (e.g., sufficient quantity of affordable housing and reasonable rents for small business)

(“strategy” and “tactics”: - from [Alan Emrich](#))

strategy: *Strategy is ... a big picture look at a problem that focuses upon the entire forest and not individual trees. (In other words, it is a non-detailed overall approach to solving a problem which establishes a framework within which tactics are devised, implemented and their effectiveness assessed.)*

example: We will involve as much of the Somerville community as possible in the sort of dialogue that enables us all to know and to speak confidently with regard to what those of us who live, work and operate businesses in the city want to see come about as the result of the development process.

tactic: *Tactics present a small picture perspective where individual trees are in focus but the big picture of the forest is not. In other words, tactics are the individual steps involved in working toward objectives (which in turn are aimed at achieving our goal(s); each tactic that is formulated, refined and employed supports one or more elements of strategy.*

examples: (based on strategy stated above):

- working with journalists interested in covering the development story
- creation and promotion of web-based resources that enable community members to easily learn the history of the development process, to know about upcoming events and to engage with us and with one another easily by means of an electronic forum system
- working with one another on an ongoing basis to further refine our strategy and tactics
- sponsoring events and activities permit us to share our vision, learn about the needs and priorities of those attending, and give them an opportunity to meet and develop working and personal relationships with one another

Thinking About Strategy

Before being able to think in a meaningful and useful way about strategy, we must be clear on our goal(s) and objectives, since the purpose of strategy and tactics is enabling the accomplishment of objectives, which themselves aim at satisfying our chosen goal(s). We must also be clear on the relationship of goals and objectives with one another.

Note that the goal stated on the previous page is (deliberately) general. It doesn't describe specific potential achievements, but rather what we are aiming for as the result of those achievements. In the example given, getting our CBA (or as much of it as possible, at least) adopted is not a goal, nor is it a strategy (or tactic). It is a list of some of the specific results we want to help bring about which in turn support our goal. Realistically, since we may not be able to get our presently-written CBA adopted in whole, we might do best to think of it as a description of some of our most important objectives that we would like to have adopted in a CBA negotiated by the city with developers.

“Strategy” is the overall approach we plan to take in working toward the achievement of our objectives, such as those listed in our CBA. It has to do with the general methods we intend to employ. Those strategic methods are given concrete meaning by means of the tactics we choose and apply.

One of the most important questions we must ask ourselves in developing a coherent and effective strategy is the extent to which we intend to (or even can) work within the terms of the process which is being formulated and articulated by the city in collaboration with its consultant and its chosen developer. Since Union United has not been invited into that process (though an agreement-in-principle for one or more representatives to be part of the upcoming LOCUS events on 28 October and 2 December has apparently been conceded), our only means of interacting with it is by means of the four members of the mayor's appointed CAC who are also members of Union United (who have to date not been extremely outspoken or able to attend CAC meetings consistently), and the single meeting with the city's consultant we were granted, during which we did not have a real opportunity to present our case.

Having been labeled as not genuinely representing the Somerville “community” (a term that itself deserves a well thought-out definition), we also must decide whether it is either possible or worth the effort involved to work toward being thought of differently and to “get a place at the table.” Otherwise, we must either work through the CAC, which many doubt can itself be truly effective as a voice for the “community,” or continue working primarily by means of public demonstration, and thus run the risk of being seen by Somerville residents as a rag-tag collection of “rabble-rousers” making noise about issues that they see as being better handled by the elected representatives who take themselves to be the only authentic and legitimate spokespersons for the interests of those who live and work within the city.

Goals & Objectives

To start our thinking by focusing on matters of strategy is really the classic case of “putting the cart before the horse,” since strategy, as defined above, has to do with achieving objectives that support one or more goals. We would, therefore, do well to enlarge our thinking about strategy by looking more carefully at our goals and objectives. While thinking and talking about strategy and tactics, we must continually keep our objectives in mind (both those represented by the CBA and others that come from thinking about additional priorities that emerge through public dialogue), so that our overall plan and the specific actions we take are grounded firmly in an awareness of what we want to achieve, and so that evaluating alternative approaches with respect to one another can be done in a meaningful fashion.

Strategy and Tactics

Once we are clear on the meaning we agree of terms (goals, objectives, strategy and tactics) and how they differ from and relate to one another, we can think about strategy in a much more meaningful way, with respect to the objective of getting the CBA adopted – along with any others we might devise. Some strategies will be specific to one certain objective, and some will be general. For example, one element of strategy that can apply to several objectives has to do with the approach we take in dealing with the city and its consultant(s) and with the developer. We can decide, for example, to make efforts to “build bridges” and establish respectful dialogue, in hopes that the good faith we demonstrate will be reciprocated. Or we can take a more firm or even confrontational stance, demonstrating that we are unwilling to be patronized, humored or taken for granted, having already decided that attempts to achieve a more conciliatory sort of relationship is based on unrealistic hopes and is therefore bound to be a waste of time. A third option is to devise an approach that is based on good faith and good will, but may end up being useful mostly as a gesture, which we must follow up with a more hard-nosed kind of communication once we have been able to demonstrate that, as we may expect they will be, our initially friendly gestures have been rebuffed. (For example, we can make a good faith effort to take part in at least the first of the two planned LOCUS events, even though many of us are deeply distrustful of those organizing them and suspicious of the process proposed for their being conducted. Doing so could give us a “strategic advantage” later if we are thus able to claim with good cause and evidence that we were not allowed to adequately present our case and/or have our ideas considered and discussed seriously.)

The element of strategy cited on page 2 is about putting substantial effort into gaining additional legitimacy in speaking and writing about “community benefits” by means of various forms of “outreach” to members of the community, both along the lines of what has already been done in the Union Square East efforts, and in the form of new initiatives of various sorts. That strategic element would support an objective of being able to address claims made by the city (e.g. Ed O'Donnell) that we do not and cannot really speak for the Somerville “community” (a term which itself deserves some thought and better definition than we have devised thus far) as a whole - while they claim (with some at least superficial credibility), that they, as elected officials, actually do.

Public Dialogue

Our discussion about strategy should thus probably begin by considering this question, of whether we do have, or can easily acquire, any real means of being able to speak authentically about representing such values and the people who we would claim hold them here in Somerville. One of our present major strengths is the diversity represented by those who live in the city relative to what we can imagine would be the case in a number of years absent the efforts of ourselves and others working for similar ends.

One of our present areas of greatest vulnerability lies in our present inability to speak with complete conviction or authority about representing the values of a large enough segment of the city's diverse population, so we may not be able to effectively defend Union United against the charge of our being a “special-interest group” that wants to promote certain values over others, and that has no special claim to being party to negotiations with the city's developer, US2. In much the same way that elected city officials derive their claim to speak for the people they say they represent, Union United bases its claim to speak for the “community” upon the fact of its comprising a coalition of member organizations, which in turn claim to represent their membership. We have, however, not done much thus far in the way of making specific efforts to engage in direct dialogue with residents of the city, other than to invite them to attend our meetings by means of public announcements, and to try to make them welcome when they do attend. We may think of ways to communicate with those people where and when we find them.

By defining our goal narrowly around those items that presently represent our current focus, we may deprive ourselves of much of the moral force we could possess were we to have a strong relationship with a larger segment of the population, so that our priorities are embedded within a larger set that are those of Somervillians at large. Considering this idea may lead us to formulating a goal and objectives to go with it, as well as a strategy that is more inclusive than what we have been considering thus far. Actually, we could take a major step in that direction by putting greater stress than we have been, both in our thinking and in our public communications, on some of our other stated objectives, such as open space, public safety and arts & culture, and talk about the values those things represent in our dealings with the public. But before we can think in a truly meaningful way about “community outreach,” we would do well to examine what we mean by the term “community,” which we tend to use a lot, and what sort of ethical case we have for promoting our ideal of “development without displacement” in the context of “community values” as they exist within Somerville and in North American society more broadly. (Ideas about defining “community” will be presented for review at a later date.)

Perhaps we could do much more in the way of outreach to individual residents and operators of businesses in the city not necessarily for the purpose of engaging them in our activity or initially putting serious effort into educating them about our priorities, but rather simply to make them aware of our existence and to solicit their thoughts, feelings and ideas, in a number of ways, and to make conscious efforts to incorporate what comes out of such dialogue into our own thinking about advancing our major goal, in the form of identifying any additional objectives that we feel are worthy of inclusion which emerge from that dialogue. By means of a newsletter and/or offerings on our web site, we can make efforts to gain the trust and respect of those who we encounter through whatever tactics we choose as a means of doing such outreach, which would seem likely to produce “buy in” of important elements of our overall agenda even by those who had not previously thought about such things (like the importance of affordable housing or employment opportunities within the city). As the result of such effort, we can expect that over the long term we would put ourselves into a better position to stand up to claims that we do not truly represent the views or interests of a substantial portion of Somervillians, since we could produce actual lists of those who support us and/or we can count as members, some of whom we can assume would be willing to demonstrate that support in a variety of ways (e.g. participating in public rallies and other events, writing letters to city officials, especially to their aldermen, whose voice and active support is crucial to the achievement of our objectives).

Advisors and Alliances

We might want to give serious consideration to the idea of identifying and recruiting advisors of various sorts: those who have knowledge of techniques for communicating clearly in constructive and non-threatening ways and for negotiating effectively (and/or written resource materials that provide such information), those who have knowledge of professional planners and how they operate, both from academic and practical perspectives, and those who have specific subject matter expertise regarding each of the less well explored areas we say as a group that we support (e.g. planning of open space and recreational facilities and of library and community meeting space buildings and technology). We should be able to cultivate to good advantage a broad set of concerns that are important to us while retaining our support of and advocacy for easily marginalized and neglected segments of our society. Being able to do so, both via an expansion of our own coverage and through strategic alliances with groups and individual persons that/who care about such matters and are skilled in working on them offers the advantage of becoming relatively immune from charges of representing only special interests and not being able to speak for a sufficiently wide range of public interests to be on a par with those who would prefer to make decisions in relative isolation from the public they claim to benefit and represent.

As examples of the sort of research and study that would seem to be most useful in conducting our tactical efforts, we could look at the writings of academics such as Prof. George Lakoff (University of California, Berkeley (linguistics)) and [Prof. Richard Sennett](#) (New York University / London School of Economics (sociology)). [Prof. Sennett, who previously taught at MIT and at Brandeis University, and who has views of a semi-political sort that appear to be broadly supportive of our orientation and objectives, might also be willing and able to direct us to some useful local advisors, advocates and/or mediators. While we surely don't have the time and energy to get too involved in "psyching out" those with whom we must engage in this struggle, developing some insight into how they think and operate (Sennett) and use (and abuse) language (Lakoff) could be extremely valuable in our dealings with them.

As was talked about at the steering committee meeting of 30 August, we can make inquiries to see if the services of FMCS (as was suggested by Van) and/or those of the Harvard Negotiation Project, headed by Prof Roger Fisher, might be available to us.

Areas for Research

Additional items to research and understand better are:

- history of LOCUS, US2 and those who represent those organizations
- What CBA efforts in other cities have been successful - and why?
- What CBA efforts have failed - and why?
- What is the current state of debate concerning eminent domain "takings," and might we have legal grounds to challenge the "blighted" designation being applied to properties in the Union Square area? (Even if we find that we are too far apart ideologically from an entity like the "Institute for Justice," which has recently sent out notices claiming that residential properties could be seized under the city's power of eminent domain and urging people to oppose all such takings, we might find ways in which their activities serve our purposes, even if unintentionally.)
- What assumptions underlie the efforts of planners, how do they typically operate during redevelopment efforts, what other struggles in locations across North America have been conducted that are similar to ours, and what can we learn by studying their history? (Perhaps we can make contact with some of those who have been involved in those struggles and recruit at least some of them as allies and advisors.)
- Who are possible natural allies in the city (e.g. [Green and Open Somerville](#)) and in the greater Boston area, and with which of them might we be able to establish mutually-beneficial relationships?
- Have we done enough to get to know those working primarily with other groups (e.g. Union Square Neighbors, whose main focus is on the construction of a library/community center in Union Square), and what efforts can we make to think about working with them "on neutral ground," so as to counteract and overcome whatever seeming ideological differences might presently exist?
- Do we have a good understanding of the plans that have been presented in a general form at the post office meetings, and can we do more to understand issues such as planned traffic pattern changes, open space proposals and how support for arts and culture activities in Union Square could be improved?
- What is the "Institute for Justice" (Arlington, Virginia), what is their underlying agenda, is there, as their recent postcards seem to imply, a basis for challenging the city's eminent domain taking rights, and do/can their activities assist ours in any fashion, even if indirectly or unintentionally?
- Who might be good potential advisors and resource people who have knowledge and skill in subject areas related to our work (e.g. city and regional planning, negotiating, community building)?

Other elements of strategy include:

- developing relationships with media outlets and their personnel to ensure that the story they tell is as accurate and balanced as possible
- designing and managing web site to provide information, encourage involvement and support dialogue to best advantage
- encouraging thinking among UU-affiliated members of CAC to become more active in using that body for the purposes for which it was ostensibly established and making it more democratic than it is at present
- thinking about ways of creating better communication among UU working groups
- making efforts to get more active involvement among existing UU member organizations and identifying and developing relationships with additional ones
- doing more outreach to ethnic/cultural and faith communities to involve their members and representatives actively in our efforts and getting a better understanding of their needs and priorities
- developing closer alliances with groups that are already part of Union United, but are not well represented at our meetings and other events, doing more to understand and be able to represent their specific interests than we may be at present

Now that a number of aldermen have spoken out in favor of negotiating a CBA with the developer, we must ensure that we can reach with them a good understanding of what should be in that CBA, and agreement with the principle that US2 must not be permitted to claim as a community benefit whatever financial contribution they might make in support of the construction of the Green Line extension. We should probably think about ways of reaching out to members of the public educating them about some of the issues and encouraging them to contact their aldermen to express their views.

Tactics

Specific actions supporting the above-listed elements of strategy might include (in no particular order):

- creating surveys to assess community sentiment (both electronic and those conducted in-person by means of setting up tables at local venues (e.g. *Fluff* festival)), accompanied by informational presentations, to educate and inform those taking part in the surveys well enough so that we are able to collect useful data to include in presentations to the city and developers and/or to media outlets
- creating an online forum via the web site and promoted through social media to permit and encourage community members to express their opinions, tell us and one another about their specific needs and desires and to make contact with one another - and with us
- thinking about if and when petitions and letter-writing campaigns might be useful (we have to conduct this sort of activity with great care and for specific purposes, and not “over-do” it)
- engaging in whatever well-considered public actions we might deem to be necessary

Closing Statement

This document is a somewhat rough draft, intended mainly to assist in our discussion at the September steering committee meeting where we will invite members of Union United as a whole to join us in thinking about matters of strategy, etc. An examination of the meaning and/or importance of vision and mission statements will be forthcoming in a separate document.