



Anika Van Eaton, Managing  
Trustee  
Vickie Choitz, Managing Trustee

# City of Somerville Job Creation & Retention Trust Monthly Meeting

*Trustees*  
Thomas Bent  
Silvana Dinka  
Jim Hachey  
Jacob Luria  
Wilfred Mbah  
Rachel Nadkarni  
Rand Wilson

## Meeting Minutes

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**Location:** Hybrid: Online via Zoom Meeting AND In-Person at Tufts Administration Building  
**Date:** July 17, 2025  
**Time:** 6:30 PM

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### Attendance

- Trustees: Thomas Bent, Vickie Choitz, Silvana Dinka, Jim Hachey, Jacob Luria, Rachel Nadkarni, Anika Van Eaton, and Rand Wilson
- Economic Development Staff: William Blackmer

### Meeting Minutes

*A Van Eaton: Meeting called to order at 6:33pm. Quorum established with 8 trustees in attendance.*

*W Blackmer: House rules about technology delivered.*

#### 1. Review and Approval of past meeting minutes

- a. Vote to approve June 10th meeting minutes

Motion: V Choitz makes motion to approve June 10th meeting minutes. S Dinka seconds the motion.

Roll Call Vote: Motion passes by vote of 8-0.

#### 2. Review Received and Estimated Linkage Fees for 2025

*W Blackmer: The big update this month is that I got an answer back from our Finance team about whether or not we earn interest on our account balance. We do earn monthly interest on the balance of the Trust Fund, and since its inception, the Fund has generated \$400,000 in interest. As a result, the current linkage fee balance sits at around \$2.6M. There's an additional approximately \$900,000 we are anticipating from 2 projects that are wrapping up. Currently, we aren't projected to receive any funds in 2026 or 2027.*

#### 3. Review and Discussion of Active Programs and Obligations

##### a. Status Update on Current and Recently Concluded Programs

*A Van Eaton: Active programs include SCALE's second contextualized ESOL/CNA cohort, the Post-Secondary Success Coaching Program, FC Tech's Clean Energy and IT programs, MassHire Metro North Workforce Board's Pre-Apprenticeship training, Just A Start's Biomedical and IT trainings, Per Scholas' IT trainings, and the Professional Development Fund for Workforce Development Professionals.*

*Programs that recently ended are CSW's Trauma & Resilient Somerville training and Bunker Hill's Somerville English Language Learning Project, as well as several of SCALE's programs.*

**b. Update on Good Municipal Jobs Request for Proposals (RFP)**

*A Van Eaton: RFP was released in late May and we had an info session June 2<sup>nd</sup>. We have a second question period that closes tomorrow (7/18) at noon. Proposals are due 8/15.*

*Regarding other obligated funds, we are waiting on the hiring of a workforce development staff person to move forward with the job quality and human resources training priority. For the Childcare Career Advancement Initiative, our staff person is meeting with SomerPromise to draft an intergovernmental grant agreement. Are there any questions about any items on this list?*

*V Choitz: Do we have any updates on the hiring of the workforce development staff person in relation to the priority around job quality and human resources?*

*R Nadkarni: Earliest potential start date for this position is 10/1/2025. There has been a lot of discussion around appropriately naming the position and about the responsibilities of this position so that it is seen as both a partner to workers and to employers. We appreciate the help in sharing out this job opening once it is made public.*

*V Choitz: I've heard mention of a "hiring freeze" is this across the City of Somerville or only for specific departments?*

*R Nadkarni: The City is doing staggered hiring, so that is why the staff person would start on or after 10/1. Our team also has a vacant Senior Planner for workforce development that is projected to start 12/1 or later. Staggered hiring means that the City is not looking to fill all vacancies as soon as possible.*

**c. Discussion regarding Financial Literacy Priority in light of other RFP considerations**

*A Van Eaton: We have been discussing a request for proposals on this topic for a while and have been trying to schedule a meeting of the subcommittee. In the meantime, W Blackmer flagged that we are also beginning to talk about more of an "open call" RFP to serve the need of the workforce development and training community in light of the partner survey and unstable funding landscape at the federal, state, and other levels. The question is, do we want to send out another specific RFP on financial literacy, or do we want to incorporate financial literacy into a broader RFP to be released this fall?*

*V Choitz: I think we should roll financial literacy into the larger, general RFP. This feels like it is a more flexible approach for our community partners.*

*J Hachey: I agree, and financial literacy could be part of a larger application to accompany other services.*

*A Van Eaton: Not seeing any concerns, I think we would need to do a vote to re-obligate the \$250,000 from Financial Literacy back to the main pot.*

*W Blackmer: We can put a formal vote on next month's agenda for re-obligating this \$250,000 plus whatever other finds the Board wants to obligate to the broader RFP.*

**4. Discussion of Fall 2025 Request for Proposal**

*A Van Eaton: At last month's meeting, we discussed issuing a future RFP more responsive to needs expressed by our partners in our survey from earlier this year. One theme that emerged from the survey was the desire for an RFP with a more flexible scope.*

The Board discussed starting with the language in its governing documents to structure the RFP and indicate what funds could be used for. Since our meeting, W Blackmer took the meeting minutes from that meeting and started drafting a scope that was shared with the Board. Blue highlighted text indicates language added to further contextualize those bullet points. The bullets are:

- Funds to assist in the creation and development of job training, skill development, apprenticeship, and adult education and credentialing programs
- Funds to assist in outreach efforts to identify vulnerable populations facing barriers to employment and provide training and services that will enable residents to access quality job opportunities
- Funds to assist purchase tools, including software, to enable the City and its workforce partners to develop data driven systems to identify and assess residents' skills or match residents with available local jobs
- Funds to assist public agencies and non-profit partners to purchase equipment and defray other capital costs directly related to job training and education purposes
- Seed money for new programs or new organizations
- Funds to support high school career and technical education programs
- Funds to assist employers and their partners to improve high road business practices with innovative models such as worker-owned co-ops
- Funds for professional development and training for non-profit and education partners
- Funds for capacity building to enhance an organization's ability to provide training and education services that will enable residents to access quality job opportunities

Are there bullet points on this draft that Board members feel do or do not meet the moment of where we want to see the Trust focus?

*R Nadkarni: The language in these bullets sounds like we are encouraging the piloting of something new. I'm wondering how this compares to the need for sustaining programs with a successful track record.*

*A Van Eaton: I think we should delete the "seed money" bullet. I might remove the "funds for professional development" RFP because we already have a pot of money available for these purposes. For the first bullet, instead of "creation and development", I think we could instead say "continuation." I think this would make it clear that the purpose of this RFP is not for organizations to create entirely new job training programs, unless they are needed due to labor market needs. This RFP could also be to continue with currently existing and very successful job training programs.*

*V Choitz: Perhaps the first bullet could say funds to assist in the "implementation" of job training..." to capture both new and old programs. The bullet on outreach efforts stands out to me as one that does not really fit because programs are going to need to do outreach for their programs. We want to fund well beyond just outreach.*

*I would use similar language for purchasing tools and purchasing equipment to make sure the software purchase is directly tied to the job training program.*

*R Nadkarni: Could those bullets be combined for streamlining purposes?*

*A Van Eaton: Yes, "funds to assist in purchasing equipment, tools including software, and other costs directly related to job training and education purposes.*

*R Nadkarni: Maybe we should consider a cap on tools and equipment costs.*

*R Nadkarni: Can someone explain the “high road business practices language?”*

*V Choitz: I think this priority is mostly about helping businesses offer quality jobs. It often involves an employer working with a nonprofit to improve their job quality.*

*W Blackmer: As a reminder, proposals may also incorporate more than one of these bullets within a single proposal.*

*A Van Eaton: Any comments on this edited bullet point list from Board members we haven’t heard from yet?*

*J Hachey: I do agree with the changes and that several items could be included in a single grant proposal. I think this RFP really opens opportunities for respondents.*

*J Luria: I support on similar lines to what Jim shared.*

*T Bent: I agree with the changes. It would be interesting to see businesses become more involved in training programs and partnering with organizations.*

*R Nadkarni: It might be worth investigating a procurement structure for this RFP that is open to businesses as primary applicants.*

*S Dinka: I agree, the language is clearer. Should all the bullets be referencing “local” jobs, “local” employers etc?*

*V Choitz: We need to be very careful that the JCRT is not seen as the funding operation for employer training. Employers need to have “skin in the game”. I’m not sure I’d be supportive of using JCRT funds to help private sector employers purchase training equipment. We need to support employers making an investment, not supplant it.*

*A Van Eaton: I think that “local jobs” is ill-defined, but we should make sure in our RFP that we are indicating that connecting residents to regionally available jobs is a primary objective of these funds.*

*R Nadkarni: If we are encouraging more employer involvement, we should consider the potential for the funds to serve employees of Somerville business and not just Somerville residents.*

*A Van Eaton: W Blackmer, what do our bylaws say about whether we can only serve Somerville residents? This comes up quite often.*

*W Blackmer: Ordinance states that the funds are restricted to Somerville residents. On the RFP draft, I did include language from our governing documents that talks about “creation and maintenance of employment and career opportunities within and near the City of Somerville for the residents of the City” that will, “permit them to succeed and maintain adequate income so they can continue to afford living in the City of Somerville. This addresses some questions earlier about the references to “local jobs.” If the Board did want these funds to be able to serve*

*employees of Somerville business who are not residents, then the Board would need to propose an amendment to the ordinance.*

*A Van Eaton: This has been a good discussion. We discussed many hypotheticals but want to remind the Board that the conversation around this RFP is about better serving our nonprofit partners who are struggling to maintain funding to deliver job training and upskilling services to our residents. The subcommittee for this RFP will continue this discussion at their subcommittee meeting. There will be more opportunities to talk through changes and review an updated version of the scope.*

## **5. Reminder of Upcoming Meeting Schedule**

*A Van Eaton: We are scheduled to meet on the 3<sup>rd</sup> Thursday of each month at 6:30PM for the remainder of the calendar year. Please see the calendar for the location of the meeting or for a Zoom link to join the meeting remotely. We will be discussing preparing for the annual public meeting in our upcoming meetings.*

## **6. Adjournment**

Motion: *V Choitz makes motion to adjourn. T Bent seconds the motion.*

Roll Call Vote: *Motion passes by vote of 6-0. J Luria and R Wilson left prior to this vote.*

## **Meeting Materials:**

- 7/17/25 Mtg Notice and Agenda
- draft 6/10/25 Mtg Minutes
- JCRT Received and Estimated Linkage Fees
- JCRT Investment Priority Tracker
- draft Scope of Work Fall 2025 RFP
- Declaration of Trust
- JCRT Meeting Schedule July-December 2025

approved 8/21/2025