



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:** August 21, 2025  
**Time:** 6:30 PM

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### Attendance

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

### Meeting Minutes

*A Van Eaton: Meeting called to order at 6:34pm. 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 July 17th meeting minutes

Motion: T Bent makes motion to approve July 17th meeting minutes. J Hachey 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 Job Creation and Retention Trust (i.e. "JCRT", "Trust" or "Board") fund earned approximately \$20,000 in interest. The current balance of uncommitted funds sits at approximately \$2.6M. The JCRT is still anticipating the arrival of approximately \$900,000 from two projects that are wrapping up at 74 Middlesex and 495 Columbia. The Trust is not anticipating the arrival of any additional 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: The JCRT is working on a no-cost extension for Franklin Cummings Tech to continue the Clean Energy/IT training program through 2026. One recently concluded program is the Trauma-Informed & Resilient Somerville training delivered by Corporation for a Skilled Workforce. A memo was shared with Board members giving an overview of the project and its successes. The JCRT is also working on an intergovernmental grant agreement with the City's SomerPromise department to launch the recently awarded Childcare Career Advancement Initiative grant. There are two votes on tonight's agenda; one related to re-obligating funds initially obligated toward financial literacy and the other to obligate funds to a Fall 2025 General Request for Proposals, as has been discussed in recent monthly meetings.*

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

*A Van Eaton: Proposals were due last Friday and we received 5 proposals. The subcommittee is beginning individual review of proposals and will meet soon once individual reviews have been completed. The committee aims to make funding recommendations to the JCRT at next month's meeting. We are seeking one more volunteer from the Board to review proposals.*

*W Blackmer: The current reviewers are T Bent, V Choitz, and R Wilson.*

*S Dinka volunteered to review proposals.*

*R Nadkarni: Did we build in an interview process for proposers for this RFP?*

*T Bent: No.*

*R Nadkarni: I would advocate for interviews with proposers in the future to increase dialogue between the Board and proposer.*

*A Van Eaton: It is good to check in on our processes. I would also urge the Board to make decisions grounded in the feedback from our partners about the benefits of a simpler application process. If we are left with questions after reading the proposals, the Board may need to be more precise about the prompts and items requested when writing the RFP.*

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

**a. Vote to re-obligate \$250,000 from Financial Literacy to Fall 2025 general RFP**

*A Van Eaton: We have two votes on tonight's agenda; the first is related to Financial Literacy. The Board ranked this as #9 on the 2024 Priority List and obligated \$250,000 towards this priority in August 2025. Since then, the Board has prioritized work on higher ranked priorities, the Childcare Career Advancement and the Good Municipal Jobs RFPs.*

*Earlier this year, the Board sent out a survey to the workforce development field considering shifting federal funding and its potential impact on our partners. Most partners have been impacted by or expressed concern about federal funding cuts and executive orders. The survey also solicited feedback on our RFP process and areas for improvement. As a result, the Board has been discussing a Fall 2025 RFP to meet the present needs of the workforce development community with added flexibility. This Fall 2025 RFP has been discussed among the Board and the relevant subcommittee.*

*At last month's Board meeting we discussed potentially moving the financial literacy dollars (\$250,000) to this broader RFP but wanted to put it as a formal vote on tonight's agenda. Any questions before we go into a vote?*

*R Nadkarni: Can we have discussion on both of tonight's votes before making the first vote?*

*A Van Eaton: B. The second vote is to obligate \$1.25M to the Fall 2025 general RFP. This was mostly discussed at our last Board meeting, so if the Board has questions about this they can ask now.*

*R Nadkarni: I don't remember the Board discussing this amount, \$1.25M, before.*

*W Blackmer: To clarify, at the last Board meeting, the idea of shifting the \$250,000 from the financial literacy priority was discussed, but the \$1.25M amount was only discussed in a subsequent subcommittee meeting regarding the Fall 2025 RFP and has not been discussed with the full Board.*

*A Van Eaton: I can report from our subcommittee meeting. We had looked at the amount of money the Board has spent every year and how much money we have left. We discussed the award amount as being up to \$400,000 for programs spanning two years. The Board also wanted to put out enough money to fund multiple organizations for two years with the understanding that there probably wouldn't be many more RFPs put out by the Trust in the next year or two because there aren't a lot of funds projected to come in and to keep a reserve of funds. Financial literacy is certainly important, but there are many other threats to the ecosystem, so putting out funds in a more flexible RFP seemed less prescriptive.*

*V Choitz: Rachel, thanks for flagging this. \$1.5M (between the two votes) sounds like a lot of money, but it can support 3-5 organizations at about \$150,000-\$200,000 for two years. Which is similar to the investments that the Board has been making in past years.*

*R Nadkarni raised concerns about releasing an RFP for \$1.5M given the state of the JCRT's funding pipeline.*

*V Choitz disagreed, citing that workforce development orgs are at a critical moment and the Trust would still have reserves after this vote and is expecting to receive additional funds from two more projects.*

*T Bent echoed R Nadkarni's concerns citing the slowdown in commercial development and the vacancy rate in recently completed commercial developments in Somerville.*

*J Hachey saw both sides of the concern: addressing community needs in the shorter term and the longer term and pitched considering bringing the amount down from \$1.5 to \$1M.*

*S Dinka agreed with lowering the number a little bit.*

*W Mbah voiced support for voting on the amounts as stated in the agenda.*

*R Nadkarni urged the Trust to think about a 3–5-year plan for Trust investments.*

*V Choitz: the Board has 7-9 active programs. A \$1M RFP would only fund 2-4 programs for two years, so we are facing a cutback in services.*

*R Nadkarni: For comparison, the City's Economic Development Division does fund several community organizations for much lower annual amounts*

*A Van Eaton: There's a difficult question in front of the Board: Do we not fund organizations that we have been funding, or do we possibly fund them at lower amounts than in the past to hold a greater reserve of funds for future years? It sounds like some Board members are leaning toward limiting funding now when organizations may be getting hit by other types of funding cuts and this gives me concern.*

*R Nadkarni: I'm leaning toward moving the \$250,000 obligated for financial literacy back into the pool and at the very maximum I'd be comfortable with obligated \$1M to the Fall 2025 RFP. For longevity, the JCRT needs to think about alternative funding sources beyond commercial development linkage fees.*

Motion: V Choitz makes motion to re-obligate \$250,000 from the financial literacy obligation back into the JCRT's general fund (unobligated funds). S Dinka seconds the motion.

Roll Call Vote: Motion passes by vote of 7-0. W Mbah left the meeting prior to this vote.

Motion: V Choitz makes motion to obligate \$1.5M for the Fall 2025 general RFP. S Dinka seconds the motion.

Roll Call Vote: Motion does not pass by a vote of 3-4.

Motion: V Choitz makes motion to obligate \$1.2M for the Fall 2025 general RFP. S Dinka seconds the motion.  
Roll Call Vote: Motion does not pass by a vote of 3-4.

R Nadkarni: Do we have a cap on the application amount included in this RFP?

A Van Eaton: Yes, the cap is \$400,000 over 2 years.

W Blackmer: It could be good for the subcommittee to reconsider this cap depending on any amount approved this evening for the total RFP size.

Motion: J Hachey makes motion to obligate \$1M for the Fall 2025 general RFP. T Bent seconds the motion.  
Roll Call Vote: Motion passes by a vote of 7-0.

A Van Eaton: The subcommittee will meet to discuss any edits to the cap set on individual award sizes.

## **5. Discuss Annual Meeting Plan**

*A Van Eaton: Since the Board will probably have items to vote on for our October meeting, we've decided to shift the annual meeting to November 20<sup>th</sup>. This meeting will probably look different from past annual meetings since we are putting out a much more flexible RFP soon and have already made several investments this year that have been responsive to needs identified in past annual meetings. The meeting should showcase our impact, preview upcoming investments, and inform the community about the fiscal picture the Trust is facing. What thoughts or ideas does the Board have on what this meeting should cover and what type of feedback we are looking for?*

*R Nadkarni: I agree with the plan as you've described it. We could ask the public to help us think about creative partnerships and the potential for matching funds from an employer.*

*V Choitz: Yes, our applications could ask about matching funds. I do think we need to focus on how we can tap into other pots of funding in addition to the jobs linkage fee. This is an area for ongoing research and conversation.*

*W Blackmer: I think that there should be an emphasis on inviting employers, particularly those that are working collaboratively with programs the JCRT has funded.*

*R Nadkarni: Maybe not in November's meeting, but other opportunities to celebrate and highlight successful partnerships.*

## **6. Adjournment**

Motion: T Bent makes motion to adjourn. A Van Eaton seconds the motion.  
Roll Call Vote: Motion passes by vote of 7-0.

## **Meeting Materials:**

- 8/21/25 Mtg Notice and Agenda
- draft 7/17/25 Mtg Minutes
- JCRT Received and Estimated Linkage Fees
- JCRT Investment Priority Tracker
- August 2025 Memo re: T&R Somerville Program Conclusion
- draft Fall 2025 RFP excerpts for review

*Approved 9/18/2025*