



City of Somerville Job Creation & Retention Trust Monthly Meeting

Anika Van Eaton, Managing
Trustee
Vickie Choitz, Managing Trustee

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

Meeting Minutes

Location: Remote via Zoom Meeting
Date: February 19, 2026
Time: 6:30 PM

Attendance

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

Meeting Minutes

A Van Eaton: Meeting called to order at 6:35pm. Quorum established with 7 trustees in attendance.

W Blackmer delivered house rules about technology.

1. Review and Approval of past meeting minutes

- a. Vote to approve January 29th meeting minutes

Motion: W Mbah makes motion to approve January 29th meeting minutes. T Bent seconds the motion.

Roll Call Vote: Motion passes by vote of 7-0.

2. Review Received and Estimated Linkage Fees for 2026

W Blackmer: The current uncommitted balance of the Job Creation and Retention Trust Fund sits at around \$2.58M. There's approximately \$500,000 we are anticipating from 1 project that is making its second of 2 payments and will be invoiced soon. Currently, the Trust isn't projected to receive any other funds linkage payments in the next few years.

T Bent: When the approximately \$500,000 payment from 74 Middlesex is received, the Trust will have approximately \$3 Million in uncommitted funds, is that correct?

W Blackmer: Yes.

3. Updates on Active Programs and Upcoming Programs

W Blackmer: This chart, which was shared with Board Members prior to tonight's meeting shows active and upcoming programs funded by the JCRT. I am working on finalizing no-cost extension with Mass Hire Metro North Workforce Board (MNWB) through June 30th, 2026, in line with the vote taken at last month's meeting. One more program that has launched since our last meeting is Somerville Center for Adult Learning Experiences (SCALE)'s Facilities Maintenance Training. SCALE recently met with City of Somerville HR to talk about hiring needs in the Department of Public Works (DPW). There are a few programs led by Somerville Community Corporation (SCC), Community Action Agency of Somerville (CAAS), MNWB, and Per Scholas that are set to

launch in the coming months.

T Bent: DPW is also partnering with Somerville High's Center for Career and Technical Education (CTE) on a co-op for an electrical student, which is a great step.

A Van Eaton: Thanks, Tom. Next, we have 3 votes on tonight's agenda that were explained in a memo shared with the Board members prior to tonight's meeting. The votes are to officially return unspent money from certain programs and requests for proposals (RFPs) back to our pot of uncommitted funds. Are there any questions before we seek a motion on the first vote?

- a. Vote to return \$50,414.40 award made to Tech Goes Home to uncommitted funds.
Motion: A Van Eaton makes motion. T Bent seconds the motion.
Roll Call Vote: Motion passes by vote of 7-0.
- b. Vote to return \$49,585.60 not awarded during Fall 2025 RFP to uncommitted funds.
Motion: A Van Eaton makes motion. V Choitz seconds the motion.
Roll Call Vote: Motion passes by vote of 7-0.
- c. Vote to return \$17,188.49 balance from Post-Secondary Success Program to uncommitted funds.
Motion: A Van Eaton makes motion. W Mbah seconds the motion.
Roll Call Vote: Motion passes by vote of 7-0.

4. Strategic Planning discussion to inform future RFP

A Van Eaton: At last month's meeting, the Trust began brainstorming a list of strategic planning tasks and topics we'd like to tackle in 2026 to help inform the Trust's next request for proposals (RFP). The ideas from the last meeting were shared in a memo with the Board in advance of tonight's meeting. Tonight, we'd like to revisit the list we generated and determine if they are the right tasks and if there are others to include and begin discussing their timing relative to the next RFP release which we discussed as being in late 2026 to fund programs starting in 2027.

V Choitz: We should consider leveraging our annual public meeting to get information from our grantees or potential grantees about the current context. I found last year's survey of grantees to be helpful in learning about anticipated funding cuts and the environment they are operating in.

A Van Eaton: Yes, we may want to consider holding the annual public meeting a little bit earlier in the year this year.

V Choitz: Perhaps the first half of the meeting could be more of a focus group.

A Van Eaton: William, is interim reporting part of each grant agreement?

W Blackmer: Yes, each grantee has a unique reporting schedule based on program start dates, milestones, and end dates. If we are using part of the annual meeting to discuss the Board's progress over the span of the year, it would be good to hold this after June so that we can report on program progress for the full year. I'm pretty sure all programs will have submitted an interim report by then.

S Dinka: I love our list, but I'd like to hear a little bit more about TransMedics.

R Nadkarni: TransMedics is an interesting vertically integrated company that recently announced they are moving their headquarters to Assembly Square in Somerville. They currently have around 300 employees at their Andover office and will occupy a full lab building at Assembly. They are expecting to add 600 jobs over the next 5-

7 years requiring a range of experience and educational attainment, including assembly and manufacturing jobs that will only require a high school diploma. They are a global leader in organ transplant technology and anticipate Assembly Square to be their base for the next 30+ years. Regarding timeline, I recently sat down with their newly hired HR director who is beginning to think about what their growth will look like. We will keep the Board informed as we get deeper into this conversation in the future. TransMedics has made commitments to hosting high school interns and making financial contributions to high school STEM and robotics programs.

T Bent: Have you had an opportunity to explain the JCRT to TransMedics yet?

R Nadkarni: A little bit. One part of the tax incentive package that the City and TransMedics have agreed to is to sit down with City staff on a regular basis to discuss talent pipeline needs so that we can track trends and help connect them to our ecosystem of partner accordingly.

T Bent: I do think that it is important for us to have a conversation soon with Mayor Wilson's team to talk about the Jobs Trust and learn more about his economic development and workforce development priorities.

R Nadkarni: I will connect with the Mayor's team to discuss this.

S Dinka: For local labor market information, what is the frequency by which we get these updates?

W Blackmer: MassHire Metro North Workforce Board, one of the training providers that we fund, releases quarterly regional reports on labor market information. They are not limited to Somerville, but we can also reach out to request a Somerville-specific report like we have in the past.

V Choitz: I agree with Tom about hearing from the Mayor sooner rather than later. The JCRT has been using the Talent Equity Playbook to guide its investment strategy, so it would be helpful to know if those strategies are still the ones we should be following or if there are other strategies we should be addressing with our RFP. Prior to meeting with the Mayor, it would be helpful to receive a summary document outlining the Mayor's economic development and workforce development strategy so that we are prepared to have a conversation when we meet.

W Mbah: I'm wondering how we can engage more with Greentown Labs as a resource for the community and the high school.

R Nadkarni: I do agree that it may be good for us to spend some time soon revisiting the Talent Equity Playbook and I am sure the Mayor is also interested in the Board's perspective on this.

A Van Eaton: Thanks, Rachel. Could you speak to Councilor Mbah's question about Greentown Labs?

R Nadkarni: When it comes to Greentown Labs and the JCRT, I am trying to figure out how best to engage them around workforce development. They are an incubator supporting many early-stage entrepreneurs and startups. They do work with these small companies and support them as they look to grow. There are many ways to work in partnership with Greentown that support strategies of the Talent Equity Playbook. I think we still have to figure out the role of the JCRT when it comes to the City's collaboration with Greentown Labs.

A Van Eaton: I think it is important for the Trust to learn more about the various employers across the City and the City's relationships with them.

T Bent: Greentown itself does not hire a lot of people, but its important to get their perspective on emerging technologies and how to prepare our residents for careers in those fields. We also need to pay attention to Artificial Intelligence and its impact on the workforce so that we are training residents with durable skills that will

remain relevant in a changing landscape. I had a chance to read the MNWB report and it highlighted the importance of the healthcare sector in our region. It would be great to hear from Cambridge Health Alliance and our other large healthcare employers.

R Nadkarni: I could see us hosting a roundtable for our own education and to allow various stakeholders to share and hear from each other. Maybe we invite someone from Greentown, MNWB, the Main Streets organizations, SCC, TransMedics, CHA, and others to talk about hiring trends and the skills that employers are looking for. This could possibly factor into a modest update of the Talent Equity Playbook.

T Bent: I heard great things about the community partners event that the Mayor held last week?

V Choitz: Can you share more about this event?

W Blackmer: The Mayor's Office hosted a community partners summit last week. The main objective was to introduce many community partners to Brenna Broderick, the new Community Partnerships Liaison. Her role serves as a central point of contact for community organizations that may interface with many different departments across the City. The group also discussed challenges that community partners face and ways they overcome these challenges. It seems like this will be part of a continued series and many of our grantees participated.

A Van Eaton: Thanks, William. We've had a great discussion tonight and some priorities that we've set are connecting with the Mayor's Office soon to hear their thoughts on the Talent Equity Playbook and their economic and workforce development priorities and continuing to reference labor market reports, including the MNWB quarterly reports. We have had a few different ideas about how to get input from external groups, including businesses and community members and we will discuss this the next time the Board chairs meet. We may be able to come to the next monthly meeting with a proposed calendar about which topics we aim to cover in which quarters of this year. In late Spring, we will work on putting together a committee for working on our next RFP

5. Review upcoming meeting dates

A Van Eaton: All Board members should have received invites for the upcoming JCRT meetings. I want to ensure that we will make quorum at our next two meetings scheduled for March 19th and April 16th. Can you please review your calendars and confirm that you are available for both dates?

Board members expressed that they are available for both dates.

6. Adjournment

Motion: W Mbah makes motion to adjourn. S Dinka seconds the motion.

Roll Call Vote: Motion passes by vote of 7-0.

Meeting Materials:

- 2/19/26 Mtg Notice and Agenda
- draft 1/29/26 Mtg Minutes
- JCRT Received and Estimated Linkage Fees (2.17.26)
- JCRT Investment Priority Tracker (2.17.26)
- February 2026 Memo Re: Votes to Return Unspent Program Funds to Uncommitted Funds
- February 2026 Memo Re: Strategic Planning Tasks and Topics