City of Somerville
Job Creation & Retention Trust (JCRT)
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:	Hybrid: via Zoom Meeting and in-person at 167-169 Holland St, Somerville
Date:	September 17, 2026
Time:	6:30 PM

Attendance

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

Meeting Minutes

A Van Eaton: Meeting called to order at 6:31pm. Quorum established with 6 trustees in attendance. R Wilson joined meeting after attendance was taken.

W Blackmer delivered house rules about technology.

1. Review and approval of past meeting minutes

a. Vote to approve August 20th meeting minutes

Motion: T Bent makes motion to approve August 20th meeting minutes. S Dinka 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 sits just above $2.6M. There's approximately $500,000 we are anticipating from 1 project that is wrapping up. Currently, the Trust isn't projected to receive any other funds linkage payments in the next few years.

3. Updates on Active Programs and Upcoming Programs

W Blackmer: There are 14 programs actively running. The Youth PACMAN program decided not to request an additional no-cost extension and so that program has concluded. Just A Start is scheduled to conclude their grant at the end of this month. I have mentioned the possibility of a further no-cost extension for Just A Start and am awaiting a response.

4. Review revised schedule for upcoming meeting topics and next request for proposals (RFP)

A Van Eaton: Tonight, we will have an update on grantee performance and a preview of the annual report. Over the last few months, we have had several presentations that are informing our forthcoming RFP. Last month, we heard about recent conversations with key employers and the Chamber of Commerce; we will share our reflections on that presentation shortly. We've also had a presentation on CTE (Career and Technical Education) programming at SHS, a visit from Mayor Wilson who shared his workforce development priorities, and a presentation on labor market information.

The 2027 JCRT RFP subcommittee has been diligently meeting and later tonight we will share our progress and talk through some questions we are discussing. Next month, we will finalize our preparations for November's annual meeting, further review the RFP draft, and make a vote on the funding amount. Then, in November, we will hold the annual meeting and gather feedback from the public and have a window to be able to incorporate the feedback into the RFP draft. In December, we will finalize the RFP draft with the timeline for releasing the RFP in early January. Proposers will have until some point in April to put together their proposals and while the RFP is open, we will solicit letters of interest, hold an information session, and respond to questions. In May, after the proposal deadline, the proposals will be evaluated, and then in June, the JCRT will vote on which proposals to fund.

5. Reflections on CTE Presentation with regards to upcoming RFP and ongoing grantmaking

A Van Eaton: Last month, William presented on employer engagement conversations with TransMedics, Mass General Brigham, and the Somerville Chamber of Commerce. We are interested in hearing folks' thoughts on learnings from this presentation and how it can inform our upcoming RFP and future grant making.

W Blackmer: I will reshare the presentation on my screen and talk through some highlights. Some macro-level observations that came up in multiple conversations: we are in a unique hiring environment that is highly competitive, includes many job seekers who have been experiencing prolonged unemployment or underemployment, and the challenging economy makes for challenging business decisions such as hiring and expansion. In Somerville, employers have varying levels of familiarity with Somerville training and education providers, are eager to hire locally, hire individuals with varying levels of education and experience, and see high costs of living as a challenge for employee recruitment and retention.

T Bent: We can work with the Chamber of Commerce to spread awareness of education and training programs to the business community. Federal funding cuts and cuts to research are impacting hiring in the Northeast. I have heard that there has been some recent positive movement in Somerville related to businesses touring vacant commercial spaces in Somerville.

W Blackmer: Desired skills and competencies from employers emphasize communication, self-advocacy, adaptability, and ability to leverage emerging technologies such as artificial intelligence. Strategies for education and training providers working with employers include forming strategic connections with assistance from the City of Somerville, the Chamber of Commerce, and other intermediaries and strengthening relationships over time so that employers can see specific training and education providers as reliable sources of talent.

R Wilson: Are we prepared to make a comparable effort to hear about what workers need? We have spent a good deal of time understanding what employers need.

V Choitz: We need to make sure that the RFP is open enough to allow for budgeted time for grantees to work with employers since it sounds like providers need to engage deeply with employers. There also may be a problem if too many providers are trying to work with the same employer. I know part of William's new role is to help organize this, but I'm wondering if the RFP should include language around expectations that the grantees will coordinate with the City to share information about their programs with employers. Set more of an expectation that grantees will be keeping the City updated on the relationships that they are developing with employers. Also, the slide on desired competencies mentioned a lot of workforce readiness skills, so I want to make sure that providers understand that programs that provide workforce readiness, resume support, etc. area possibility under this RFP.

R Nadkarni: Our intention in employer engagement conversations has been to understand what employers need from training providers to build fruitful partnerships that ultimately benefit residents. I agree that residents also need clarity around what a training can provide for them and what they are signing up for. What is the outcome that they can anticipate, and what kind of job will they be qualified for when they graduate? I see a lot of

alignment between what employers and residents are looking for in a training provider. A potential step in the RFP process is to ask for more detail about the structure of the curriculum. This will help us make better funding decisions. We want assurance that providers are far enough along in program development to launch. We are intentionally building in a longer runway for proposal development.

T Bent: I agree with Rachel and Vickie and want to thank William for sending over the course outline from Asian American Civic Association's Building Energy Efficient Maintenance Skills (BEEMS) training. It is helpful for the trainee to understand the curriculum of what they are signing up for. I think the RFP should also emphasize the importance of job readiness skills in addition to technical skills.

6. Preview of Annual Report

W Blackmer: This report, still in draft phase, provides information on the funding, investments, and outcomes of the JCRT from July 2025 through June 2026. Highlights of this year's investments included serving more than 230 residents in industry-specific job training or contextualized English as a Second or Other Language (ESOL) programs and launching the Childcare Career Advancement Initiative, Good Municipal Jobs programs, and Pathways to STEM Careers Internship Program. During FY26, the JCRT received over $640,000 in linkage contributions bringing the total received to date to over $8.5M.

This year was marked by a mixture of both continued investments from our 2022-2024 Priority Lists and New Programs funded in 2025 RFP rounds. Continued programs included 4 industry-specific training programs, the Coordinator role, and the Professional development fund for workforce development practitioners. Continued programs resulted in 104 residents being trained in a range of high-demand industries and workplace English. 90% graduated or are on-track to graduate from their program and 50 have earned industry-recognized credentials across a wide range of industries. Graduates have been hired at employers including Maloney Properties, Somerville Public Schools, and BAYADA Assistive Care.

New programs included the Good Municipal Jobs Training Programs, the Childcare Career Advancement Initiative, and 7 programs selected from the Fall 2025 RFP round. The majority of participants in new programs were unemployed at the start of the program, without post-secondary education, identify as people of color, are non-native English speakers, all are low- or moderate-income. The majority are also female or non-binary, and the majority reside in the 02145 Zip Code. So far, 130 residents have received training across several industries, 77% have graduated or are on-track to graduate, and 32 have received industry-recognized credentials.

A Van Eaton: I appreciate all the work that has gone into this report and reflecting on the big picture accomplishments of the JCRT. What is the timeline for completion of the report?

W Blackmer: I am looking to include some more photos and am awaiting data from a couple of providers, so I hope to have the report complete by the next meeting.

T Bent: The report is well-structured and easy to read.

V Choitz: In a future report, we may want to place more emphasis on the employers or number of employers who have benefitted from the JCRT Fund.

T Bent: We should share the report with the Chamber of Commerce, Main Streets organizations, and neighborhood councils.

7. Report Back from 2027 RFP Subcommittee

A Van Eaton: The subcommittee has met twice since the last Board meeting and we have been working on the RFP scope of work and background information. We are seeking proposals that are responsive to the Talent

Equity Playbook, labor market information, and our recent conversations with employers. We are soliciting proposals for the following types of requests: Funds to assist in the implementation of employment, job placement, career coaching, job training, skill development, e.g. driver's education, apprenticeship, high school career and technical education, and adult education, funds to assist organizations in enhancing their ability to prepare residents for the in-demand occupations and trainings, and funds to assist employers and their partners in improving their employee engagement practices to support quality jobs or giving technical assistance to small businesses on figuring out their HR or on innovative business models, such as worker-owned cooperatives.

The subcommittee is proposing that the RFP will be for $1 Million, awards may be up to three years in length, and the overall limit per proposal would be $225,000, meaning an organization could receive $75,000 a year for three years, or a larger dollar figure over a shorter period of time.

Do we feel that the three buckets of work accurately capture the types of programs we are looking to attract with this RFP? We are also interested in hearing your thoughts on the dollar figures and funding duration.

V Choitz: This draft looks good. We may want to bold a few words at the beginning of each bullet or bucket to summarize what the bullet is about. The first one could be "employment and training", for example, the second could be "organizational capacity", and the third could be "quality jobs".

A Van Eaton: We should consider removing "employee engagement" from the third bullet and reworking the language around worker-owned co-ops to explain this as an example of advancing innovative business models.

T Bent: The RFP should ask about the experience that a provider has in delivering the programming they are proposing.

W Blackmer: Yes, we've typically included this in a later part of the RFP that focuses on what we want proposals to include and what questions they should address. This also includes discussion of prior experience.

V Choitz: I think "workforce readiness" should specifically be mentioned in the first bullet. I don't think it is covered by the current wording.

T Bent: It would be interesting to see a provider focus their entire program on workforce readiness skills and possibly partner with programs providing more technical skills.

S Dinka: We discussed that programs will be funded for three years. Does this mean that residents would need to participate in the program for three years?

A Van Eaton: No, three years would be the total amount of time for funding, but providers would probably work with several rounds of training participants over the three-year period.

R Nadkarni: In the RFP we should also ask about where the provider sees their program falling in the continuum of programming being offered and what the goal of the program is. Is the goal of the program to be placed in a job, or are there other goals or milestones to be tracked? Is the goal to graduate with skills that then prepare someone to enter a job training program, such as a developed resume, etc.? This will help us better anticipate how programs complement one another and understand what deliverables we should be tracking.

A Van Eaton: Are there any other thoughts on the proposed funding amounts or duration of awards?

V Choitz: The numbers seem fine. I am wondering if this RFP will include the $81,000 that was obligated toward job quality and human resources several years ago. Will that be folded into the $1 million or will we keep this as a separate obligation.

A Van Eaton: I think our thought was to fold that obligation into this RFP.

R Nadkarni: My interpretation was also that we would not be putting a different limit on proposals that addressed that priority. For example, if someone proposed spending $100,000 on job quality and human resources, we could entertain this proposal. The proposal would not have to be confined to $81,000.

A Van Eaton: At our next meeting it may be cleanest to de-obligate that $81,000 and return it to the main pot of unobligated funds and then have a separate vote on obligating $1 million to the 2027 RFP.

8. Annual Meeting Preparations

A Van Eaton: Our annual meeting is scheduled for November 19th. We plan to hold it in-person here at 167 Holland St. Does this date work for all Board members?

All Board members in attendance confirmed that November 19th works with their schedule**.**

A Van Eaton: Last year, our agenda covered: Who is the JCRT, What is jobs linkage funding, implementing investment priorities, overview of past year's investments, the current fiscal picture, space for clarifying questions, and then a community discussion on the future JCRT funding and investments. We will also be sharing that we are launching our next RFP in January 2027. Does anyone have thoughts on what they'd like to see in the annual meeting that are either different or the same as last year?

T Bent: We had a great group discussion last time. We should emphasize highlights from the current year and cumulative highlights of the impacts of our investments.

D Whiteside: In addition to discussing successes, we may also want to talk at a very high level about how the JCRT is handling changing economic conditions and manage expectations about how the JCRT is working strategically with more limited resources. In addition to funding, we are working strategically to learn from employers and connect strategically connect training providers with employers.

A Van Eaton: In the subcommittee we also discussed the potential timing of future RFPs and I wanted to discuss this with the full Board as well. Do we or do we not put out another RFP exactly one year after this RFP? Do we possibly wait more like 18 months after this first RFP? If we are going to wait longer, we should be upfront with the training community so that they know what to expect and that this may be the last time to apply for funds for 18 months or more. We have not been entirely consistent in past years with the timing of our RFP releases, but we should try to be as clear as possible.

R Nadkarni: Yes, we discussed in the subcommittee the possibility of waiting 18 months. Especially since we're expanding to cover programs of up to three years in length and we have programs that are already funded through the end of next year as well. We have lots of active programs and waiting 18 months will give us a beat to support the new programs launching next Fall. We also may want to save some space in our agenda to highlight some of the challenges that we are seeing and ask partners about the challenges they are seeing. We know that the funding landscape and employment landscape are both challenging. Job placement is becoming more difficult. It could also be a good opportunity to share some of the findings from your presentation, William, on employer trends and employer engagement.

A Van Eaton: Which Board members are interested in speaking during the annual meeting?

Vickie and Tom expressed interest in speaking. Anika expressed that it would be great for all Board members to have a speaking role in the meeting.

W Blackmer: Last year, we highlighted SCALE, a participant from SCALE, and an employment partner during the meeting. Would we like to do something similar this year?

T Bent: I'd like something similar again.

S Dinka: I'd like a participant to talk about how they heard about and accessed the program and how it was to navigate.

R Nadkarni: I've spent some time looking at the Bunker Hill and SCALE websites and it is a little bit challenging to find information on when the next JCRT-funded classes are. I am hoping that with us pushing out the start date of programming with our next RFP that it will allow enough time for the City to collaborate with our partners on outreach and make sure all the funded opportunities and recruitment dates and details are listed on the City website.

V Choitz: It would be great to have participant testimonials in multiple formats for marketing purposes for the JCRT. I'm wondering if it would be possible to do video recordings where a participant or business that was served is giving their testimony that we could then share at the annual meeting. This could be helpful to get the word out about our work to multiple audiences both at the meeting and in other communications.

R Nadkarni: We can ask our Communications Department if there is capacity. They can help us advertise the annual meeting through the City's social media channels. I love the idea of them helping us with videos, but I am nervous that it might be difficult to pull all those pieces together by November.

V Choitz: I'm thinking about this as a project for the future.

W Blackmer: We can share photos of trainings and written student testimonials as part of the annual meeting.

9. Adjournment
Motion: T Bent makes motion to adjourn. S Dinka seconds the motion.
Roll Call Vote: Motion passes by vote of 6-0. R Wilson left prior to this vote.

Meeting Materials:

- 9/17/26 Mtg Notice and Agenda
- draft 8/20/26 Mtg Minutes
- JCRT Received and Estimated Linkage Fees (9.9.26)
- JCRT Investment Priority Tracker (9.9.26)
- August 2026 Memo Re: Revised Schedule for Meeting Topics and Next RFP
- Conversations with Chamber and Key Employers

Approved 10/15/2026