



Annual Report 2023-2024



Somerville Job Creation and Retention Trust



COVER PHOTOS: Images of industry-specific job training programs, courtesy of Mass CultivatED, Just A Start, Asian American Civic Association, and Per Scholas.

ABOVE: 10 Prospect St is a newly completed 196,500 SF Class A life sciences building located steps from the new Union Square MBTA Station. Photo courtesy of Union Square Station Associates.

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Introduction and Background

Introduction

This is the fifth Annual Report of the Somerville Job Creation and Retention Trust (JCRT) Board, completed in December 2024. This report provides information on the funding, investments, and outcomes of the

JCRT Fast Figures

- First Board Meeting: **January 2019**
- Current Linkage Rate: **\$2.99/square ft**
- Total Fees Generated as of 6/30/2024: **~\$5.4M**
- Total Investments as of 6/30/2024: **~\$5.1M**

JCRT from July 2023 through June 2024. Highlights of this year's investments included continued funding of successful industry-specific job training, contextualized Adult Basic Education (ABE), and contextualized English as a Second or other Language (ESOL) programs. The Trust also continued funding stipends for participants in training and education programs, helping to ensure they could persist in and complete their

courses. Additionally, the Trust obligated \$100,000 for a Mental Health, Resilience, and Trauma-Informed Approaches training for Somerville workforce development and social service providers that launched launch this fall.

Background

Somerville's Job Creation and Retention Trust is the result of the City's 2016 approved home-rule petition to institute a workforce development linkage fee to create and maintain employment opportunities and provide training and wraparound support services to Somerville residents, enabling them to succeed and earn adequate incomes to continue to live in Somerville. Following an extensive evaluation of the commercial development landscape, incoming industry sectors, and resident education and skill attainment, as well as exploration to further conceptualize the future structure of the JCRT, the Somerville Board of Aldermen (now City Council) voted in December 2017 to approve a zoning amendment creating the JCRT Fund. This zoning amendment set the jobs linkage fee at \$2.46 per square foot on commercial development projects of more than 15,000 square feet. The jobs linkage fee is adjusted annually based on the Boston Consumer Price Index (CPI). The JCRT Fund is administered by a Board of Trustees. Additional information about the composition of the Board can be found on page 11.

This Year's Highlights

- Continued funding of several successful industry-specific job training and contextualized ABE and ESOL programs that incorporated participant stipends
- Obligated \$100,000 for Mental Health training for Somerville workforce development and social service providers
- City of Somerville leveraged American Rescue Plan Act (ARPA) funds to support several JCRT priorities

Funding

The current jobs linkage fee, effective March 2024, is \$2.99 per square foot. This past year, the jobs linkage fee generated over \$572,000. **Table 1** illustrates the projects that contributed to the fund this fiscal year. As of June 30, 2024, the jobs linkage fee has generated over \$5.4M (**Table 2**). While there are still projects expected to make contributions in the 2024 calendar year, there has been a slowdown in starts on new projects. As a result, the JCRT is not expecting to receive significant jobs linkage contributions in 2025.

Table 1

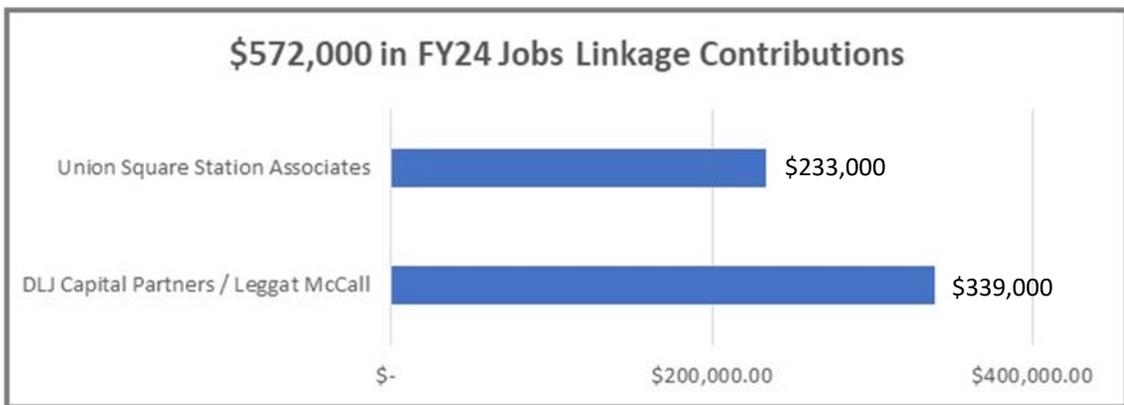
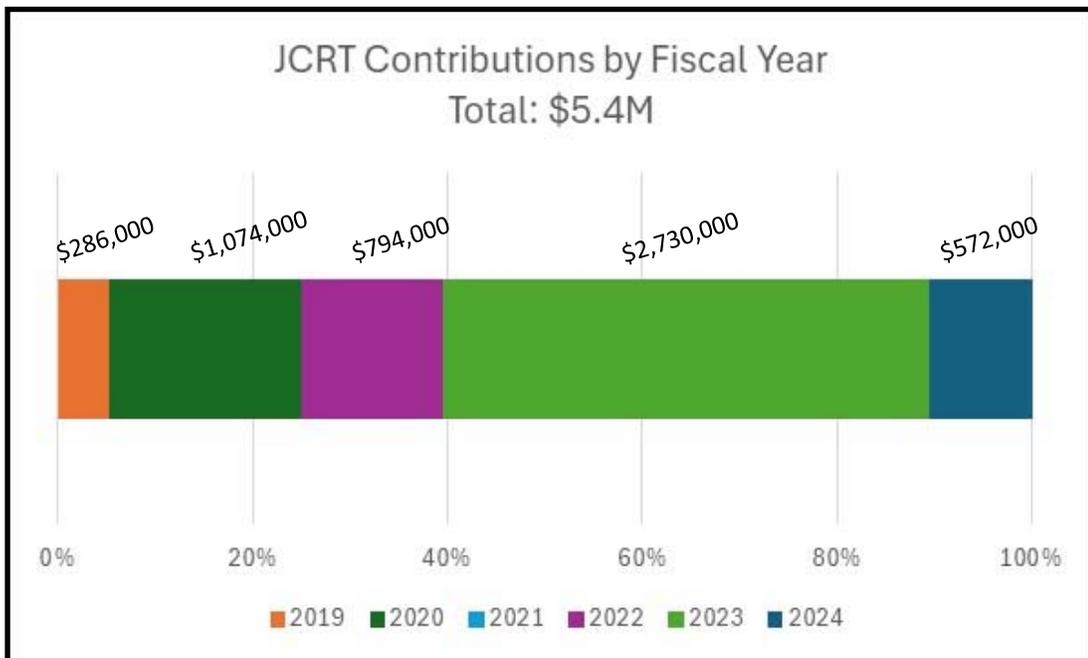


Table 2



Strategy and Investments

At the April 4, 2019 meeting, the JCRT Board adopted the City of Somerville’s [Talent Equity Playbook](#) (TEP) strategies as the framework for prioritizing the JCRT Investments. The four strategies are:

- **Strategy 1:** Build a coordinated system of education and training services that ensures Somerville youth and adults achieve their career goals
- **Strategy 2:** Position Somerville as a national leader in employee engagement practices
- **Strategy 3:** Build a full suite of experiential learning opportunities for Somerville youth and adults
- **Strategy 4:** Develop resiliency responses to the “future of work”

During this reporting period the board continued to allocate funds based on 2022-2023 Investment Priorities (**Table 3**) through December 2023, and thereafter, based on 2024 Investment Priorities (**Table 4**), as determined during the Fall of 2023. Investment priorities are identified and ranked taking public input into account. Additional information on JCRT investments and grantees can be found on subsequent pages.

Table 3: 2022-23 JCRT Ranked Investment Priorities

Rank	TEP Strategy	Investment Idea	Committed from 7/1/23- 6/30/24
#1	1	Somerville High School Post-Secondary Supports Programming	ARPA-funded; no JCRT investment needed.
#2	1	Coordination and Data Collection Staff Position – FY24 and FY25-28	Board voted to fund staff position in June 2023 meeting.
#3	1 & 3	Industry-Specific Job Training Programs	Board funded AACA, FC Tech, Just A Start, Mass CultivatED, and Per Scholas from 2023 to 2024 for a total of \$722,000.
#4	1 & 3	Somerville Good Municipal Jobs Training Program	Board set aside \$400,000 in June 2023 and is researching potential models and partners to fund within this priority area.
#5	4	Digital Literacy and Training Resources	No investment needed; embedded into SCALE agreement and ARPA-funded.
#6	2	Mental Health, Resilience, and Trauma Training for Adult Education and Workforce Development Organizations	Board voted to fund Corporation for a Skilled Workforce \$100,000 in June 2024.
#7	2	Wage Theft and Worker’s Rights Training	No investment made; Board awaiting hiring of new City staff that could support this priority.
#8 - Tie	1 & 4	Curriculum Development and Updated Training Materials	Board decided to include this as a component of future requests for proposals.
#8 - Tie	1	Career Exploration and Readiness Pre-Training Program	Board funded career exploration as an included component in Priority #3.

Strategy and Investments (Continued)

Somerville Talent Equity Playbook Strategies

- **Strategy 1:** Build a coordinated system of education and training services that ensures Somerville youth and adults achieve their career goals
- **Strategy 2:** Position Somerville as a national leader in employee engagement practices
- **Strategy 3:** Build a full suite of experiential learning opportunities for Somerville youth and adults
- **Strategy 4:** Develop resiliency responses to the “future of work”

Table 3 (Continued)

Rank	TEP Strategy	Investment Idea	Committed from 7/1/23-6/30/24
#10	1	Contextualized education for adults and English Language Learners	Board continued to fund SCALE utilizing funds obligated in 2022.
#11	1	One year post-placement services for students in recent/current JCRT-funded training and education programs	JCRT did not address this priority due to insufficient funding and annual investment prioritization process.
#12	1 & 3	Criminal Offender Record Information (CORI) expungement and job placement services	Addressed via Priority #3.
#13	1	Municipal apprenticeship feasibility study	Board prioritized investment in Priority #4.
#14	1 & 3	Paid internship program	JCRT did not address this priority due to insufficient funding and annual investment prioritization process.

Strategy and Investments Continued

Somerville Talent Equity Playbook Strategies

- **Strategy 1:** Build a coordinated system of education and training services that ensures Somerville youth and adults achieve their career goals
- **Strategy 2:** Position Somerville as a national leader in employee engagement practices
- **Strategy 3:** Build a full suite of experiential learning opportunities for Somerville youth and adults
- **Strategy 4:** Develop resiliency responses to the “future of work”

Table 4: 2024 JCRT Ranked Investment Priorities

Rank	TEP Strategy	Investment Idea	Committed from 7/1/23-6/30/24
#1	1 & 3	Contextualized ESOL: English classes focused on specific professions (for example "English with medical terminology")	\$750,000 to fund BHCC and SCALE from 2024-2025.
#2	2	Development of a workers' rights curriculum and train the trainer training	Board is coordinating with City's Economic Development Division regarding this priority.
#3	1 & 3	"Year 13 Program": Career advising, classes, experiential learning for recent Somerville High School graduates who have not enrolled in college	Investment made in Fall 2024.
#4	1 & 3	Funding to create an exploratory career program using the CTE program in conjunction with contextual ESOL	Board's priority #1 investment includes career exploration.
#5	1 & 3	Industry-specific training (including training for occupations in support of Somerville's Climate Forward goals to become carbon-neutral)	Investment made in Fall 2024.
#6	4	Digital literacy programming	ARPA funding continued to address this priority.
#7	1 & 4	Benefits Specialist Case Manager to support Somerville residents to enroll in benefits programs with an emphasis on workers experiencing job loss	No additional investment made. All education and training investments provide social service support and participant stipends.
#8	2	Mental health, resilience, trauma response training for staff of adult education and workforce development organizations	Invested prior to 7/1 (see Priority #6 on Table 3).
#9	1	Financial literacy	Investment planned for Fall 2024.
#10	2	Job quality and human resources training for small businesses and entrepreneurs	Board is reconceptualizing this priority. RFP issued in July 2020 did not receive any suitable responses.

STRATEGY 1 & 3 INVESTMENTS

INDUSTRY-SPECIFIC TRAINING PROGRAMS



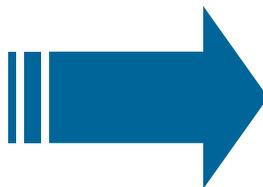
ABOVE: Images of industry-specific job training programs, courtesy of Per Scholas and Just A Start.

This year, the JCRT funded five local non-profits to provide free industry-specific job training and placement services to a total of 40 Somerville residents:

- Asian American Civic Association (AACA) provided Building Energy Efficient Maintenance Skills training to 9 residents;
- Benjamin Franklin Cummings Institute of Technology (FC Tech) served 4 residents in Clean Energy and IT programs;
- Just A Start provided IT & Biomedical Careers trainings to 5 residents;
- Mass CultivatED trained 9 residents through their Jails 2 Jobs Workforce Development program which provided CORI expungement services, internships, and job coaching support, and;
- Per Scholas provided IT Support, AWS re/Start, Software Engineer, and Cybersecurity training to 13 Somerville residents.

Intake Demographics:

- **53%** unemployed or working part-time
- **50%** without post-secondary education
- **88%** identify as people of color
- **55%** non-native English speakers
- **100%** low- or moderate-income Somerville residents



Participant Outcomes:

- **40** residents trained in high-demand industries
- **87%** graduation rate
- **\$23.56/hour** average placement wage
- **29** earned industry-recognized credentials or college credits including, **OSHA 10**, **Responsible Vendor Training**, and **COMPTIA A+**
- **Local employers include: Somerville Housing Authority, J. Calnan & Associates, Eastern Cannabis Co. and Mass General Brigham**

STRATEGY 1 & 3 INVESTMENTS

CONTEXTUALIZED EDUCATION FOR ADULT AND ENGLISH LANGUAGE LEARNERS

Learner Profile:

- **Largest Age Group:**
18-29 years old
- **Most Common Primary Languages:** **Spanish, Portuguese, Haitian Kreyol**
- **Most Common Zip Code:**
02145
- **55%** Female
- **92%** identify as people of color

Participant

Outcomes:

- **87.5%** completed 1 or more programs
- **Nearly all** participants are projected to continue education or career development at **SCALE** or another institution including **Middlesex Community College, Bunker Hill Community College, and Franklin Cummings Tech**
- **13** SCALE participants earned high school equivalency (HiSET) credential



ABOVE: SCALE Student and Staff Member at June 2024 Graduation Ceremony.

The JCRT funded the continuation of a grant with the Somerville Center for Adult Learning Experiences (SCALE) to provide 40 low- and moderate-income Somerville residents with English as a Second or Other Language (ESOL) Career Intensive classes, High School Equivalency/Adult Diploma Instruction, and an ESOL Writing lab.

Of the 40 JCRT-funded participants, 35 (or 87.5%) completed one or more programs and 13 obtained their high school equivalency. The overwhelming majority of those who completed a program either attained or improved employment or were planning to continue their career development at SCALE or another institution.

In June 2024, the JCRT obligated funds to SCALE and Bunker Hill Community College (BHCC) to provide Contextualized ESOL and Adult Basic Education to 175 Somerville residents from 2024-

"I am very grateful for the opportunities I was offered at SCALE and I hope that others will take advantage of similar opportunities at SCALE."

- JD, SCALE HiSET Graduate



ADDITIONAL INVESTMENTS

Professional Development for Adult Education and Workforce Development Professionals (Strategies 1 & 2)

The City of Somerville continues to administer a JCRT-funded Professional Development Fund for adult education and workforce development practitioners. The application and eligibility criteria are available at somervillema.gov/wfd.

Trauma-Informed & Resilient (T&R) Somerville Training (Strategy 2)

In June 2024, JCRT selected Corporation for a Skilled Workforce (CSW) to launch the T&R Somerville training to support Somerville workforce development, adult education, and social service staff and provide a comprehensive training program to build a more trauma-informed, healing centered, resilience-building system—for customers, colleagues, and themselves. This training launched in Fall 2024.

Coordinator Role (Strategy 1)

The JCRT and the City of Somerville continue to share the cost of a full-time Workforce Development Coordinator who serves as staff liaison to the JCRT and assists the Senior Planner in managing the City's workforce development portfolio. The JCRT proactively obligated \$134,466 to cover this cost through FY28.

Job Training Scholarship Fund (Strategies 1 & 3)

Last year, this fund was launched to provide financial assistance to Somerville residents participating in job training programs, particularly programs not already funded by the JCRT. Ultimately, our non-profit partner had difficulties administering this fund due to cashflow challenges. The Trust is considering whether these funds should be reallocated for a similar purpose.

ARPA Funding for Workforce Development (Strategy 1)

In addition to JCRT funds, the City of Somerville has leveraged ARPA funds to address JCRT priorities. One such ARPA investment is the creation of a pilot Post-Secondary Success program to support recent Somerville High School graduates in identifying and accessing post-secondary career pathways. This investment closely aligns with Priority #1 on the 2022-2023 Priority List and Priority #3 on the 2024 List. As ARPA funding concludes, the JCRT is exploring ways to support the continuation of workforce development programs and services that had been supported with ARPA funds.

Administration

The JCRT Board of Trustees is comprised of the following representatives that serve three-year terms:

- ◇ Mayor of Somerville or designee
- ◇ City Council President or designee
- ◇ Superintendent of Schools or designee
- ◇ Representatives of two workforce development non-profits
- ◇ Two Somerville residents, with a preference that such residents have participated in workforce development programs in the City of Somerville
- ◇ Representatives of two local businesses

JCRT Board of Trustees (as of June 30, 2024)

- ◇ Tom Bent—Business Representative
- ◇ Vickie Choitz—Resident, *Co-Managing Trustee**
- ◇ Silvana Dinka—Resident
- ◇ Jim Hachey—Superintendent’s designee **
- ◇ Jacob Luria—Business Representative***
- ◇ Wilfred Mbah—City Council President’s designee****
- ◇ Rachel Nadkarni—Mayor’s designee
- ◇ Anika Van Eaton—Non-profit Representative, *Co-Managing Trustee*
- ◇ Rand Wilson—Non-profit Representative

Staff Liaison

William Blackmer—Workforce Development Coordinator, City of Somerville

**Reassumed the Co-Managing role in January 2024*

*** Assumed this seat in January 2024*

****Colleen Moran served in this seat until January 2024*

*****Councilor Matt McLaughlin served in this seat until January 2024*

The Job Creation and Retention Trust Board of Trustees met ten times between July 1, 2023 and June 30, 2024. Meeting agendas and minutes can be found at Somervillema.gov/JCRT.

Acknowledgements

Thank you to the many partners who make our work possible, including but not limited to:

East Somerville Main Streets

MassHire Metro North Workforce Board

Mayor's Office of Racial and Social Justice

RESPOND Inc.

Somerville Community Corporation

Somerville Family Learning Collaborative

Somerville Health and Human Services Department

Somerville Housing Authority

SomerViva Office of Immigrant Affairs

**Somerville Office of Strategic Planning and Community
Development**

Somerville Public Library

Somerville Public Schools

Union Square Main Streets