

# Somerville Job Creation and Retention Trust 2020-2021 Annual Report

This is the second annual report of the Somerville Job Creation and Retention Trust (JCRT) Board of Trustees, completed in October 2021. This report provides information on the funding and investments of the JCRT from September 2020 through August 2021. The JCRT board was established in January 2019.

In its second year, the board continued to honor ongoing contracts, make investments with unspent 2019-2020 funds, learn about the local labor market needs, economy, and workforce development assets; and engage in a strategic planning process to identify specific investments, including soliciting public input on potential investment ideas. Though no additional funds were generated due in part to the ongoing COVID-19 pandemic, the board has continued existing projects and have granted the first contract renewal. The board looks forward to making another round of investments in the coming months, including both first time investments and additional contract renewals.

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## Section 1: Background, Administration, and Funding

### Background

The creation of the Jobs 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 for Somerville residents, as well as services to enable residents to access job opportunities that will permit them to succeed and maintain adequate incomes to continue to afford to live in Somerville. After an extensive evaluation of the commercial development landscape, incoming industry sectors, and resident educational and skill attainment, as well as exploration to further conceptualize the future JCRT Board of Trustees structure, the Somerville Board of Aldermen (now City Council) voted in December 2017 to approve a zoning amendment creating the JCRT fund and setting 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 has since been increased to \$2.60 per square foot through the annual revision process to adjust the fee based on the Boston Consumer Price Index. In total, since the board began, \$1,363,754.93<sup>1</sup> have gone into the Trust. In total, the JCRT has allocated \$1,357,408, and in the last year (September 2020 through August 2021), since our last report, the JCRT has allocated \$254,000 toward contextualized ESOL and experiential learning opportunities.

### 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

- Vickie Choitz – Resident, Managing Trustee
- Anika Van Eaton – Non-profit representative, Co-Managing Trustee
- Thomas F. Galligani Jr. – Mayor's designee
- Jesse Clingan - President of the City Council's designee
- Lisa Cook – Superintendent's designee
- Tom Bent – Business representative
- Colleen Moran<sup>2</sup> – Business representative
- Rand Wilson – Non-profit representative

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<sup>1</sup> This figure does not include monthly interest accrual.

<sup>2</sup> Joined Board of Trustees beginning in May 2021; selected to fill seat vacated by Josh Grehan.

- Silvana Dinka – Resident

The Job Creation and Retention Trust Board of Trustees met 11 times between September 1, 2020, and August 30, 2021:

- September 15<sup>th</sup>, 2020
- October 13<sup>th</sup>, 2020
- November 10<sup>th</sup>, 2020
- December 8<sup>th</sup>, 2020
- January 12<sup>th</sup>, 2021
- February 9<sup>th</sup>, 2021
- March 9<sup>th</sup>, 2021
- April 13<sup>th</sup>, 2021
- May 18<sup>th</sup>, 2021
- June 8<sup>th</sup>, 2021
- July 13<sup>th</sup>, 2021

Meeting agendas and minutes can be found at [Somervillema.gov/JCRT](http://Somervillema.gov/JCRT).

### Funding

Funding for the JCRT comes from a commercial development linkage fee of \$2.60 per square foot of commercial development over 15,000 square feet (fee as of March 2021). Since its inception, the JCRT linkage fee has generated \$1,363,754.93. From September 2020 through August 2021, the JCRT linkage fee did not generate additional funds, and we anticipate an influx of funds during FY22 and FY23.

## Section 2: Strategy and Investments

At the April 4, 2019, JCRT meeting, the board adopted the City of Somerville's [Talent Equity Playbook](#) strategy as the JCRT board strategy to guide its investments and align with the City of Somerville investments in workforce development. *Table 1* below provides a summary of the City and JCRT board investments in its second year in relation to the Playbook's strategies. See Appendix A for a detailed narrative of each investment made or continued by the JCRT board in year two.

**Table 1: JCRT Investments in Year Two (September 2020 - August 2021)**

<b>Strategy 1: Build a coordinated system of education and training services that ensures Somerville youth and adults achieve their career goals</b>		
<b>Strategy Plan Actions</b>	<b>City Activity and Investments</b>	<b>JCRT Board Investments</b>
<ol style="list-style-type: none"> <li>1. Develop infrastructure needed to support the coordination of education and workforce services in Somerville.</li> <li>2. Increase the scale and benefits of Somerville resident participation in jobs and their links to opportunities with anchor businesses.</li> <li>3. Leverage Somerville High School's space.</li> </ol>	<ol style="list-style-type: none"> <li>1. Hiring and funding of full-time City Senior Planner and co-funding of full-time Coordination and Data Collection staff member.</li> <li>2. Somerville Community Corporation Career Navigation and Job Placement Services, Metro North Regional Employment Board Workforce Development for Jobs at Encore Boston Harbor</li> <li>3. No investments at this time as access to this space was restricted due to the pandemic.</li> </ol>	<ol style="list-style-type: none"> <li>1. Co-funding of full-time Coordination and Data Collection staff member</li> <li>2. Training programs: <ul style="list-style-type: none"> <li>Per Scholas Network/IT Support, AWS/restart, Cloud DevOps, Software Engineer, and End-User Desktop Support);</li> <li>Just-A-Start IT Careers Program &amp; Biomedical Careers Program</li> <li>Asian American Civic Association Building Energy Efficient Maintenance (BEEMS), Careers in Banking and Finance, &amp; Green Automotive Maintenance Skills;</li> <li>Bunker Hill Community College English as a Second Language for Customer Service Industry;</li> <li>SCALE career readiness and digital literacy training for adult education students.</li> </ul> </li> </ol>

		3. No investments at this time.
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<b>Strategy 2: Position Somerville as a national leader in employee engagement practices</b>		
<b>Strategy Plan Actions</b>	<b>City Activity and Investments</b>	<b>JCRT Board Investments</b>
<ol style="list-style-type: none"> <li>1. Help motivated businesses in Somerville improve their employee engagement practices.</li> <li>2. Brand Somerville as a leader in employee engagement practices.</li> </ol>	<ol style="list-style-type: none"> <li>1. None at this time.</li> <li>2. None at this time.</li> </ol>	<ol style="list-style-type: none"> <li>1. Issued an RFP for Quality Jobs Education and Training for small businesses; did not find appropriate training partner so are continuing to explore possibilities. No investments at this time.</li> <li>2. The Welcome Project Wage Theft and Workers Rights education for Somerville workers</li> </ol>

<b>Strategy 3: Build a full suite of experiential learning opportunities for Somerville youth and adults</b>		
<b>Strategy Plan Actions</b>	<b>City Activity and Investments</b>	<b>JCRT Board Investments</b>
<ol style="list-style-type: none"> <li>1. Support and expand existing city-based efforts to ensure all youth and adults receive as many substantial experiential learning experiences as possible.</li> <li>2. Increase the number of local businesses offering experiential learning opportunities.</li> </ol>	<ol style="list-style-type: none"> <li>1. FabVille professional development and virtual fabrication community courses</li> <li>2. None at this time.</li> </ol>	<ol style="list-style-type: none"> <li>1. Training investments in Strategy #1 include experiential learning; Forsyth Student Scholars Summer Internship Program</li> <li>2. None at this time.</li> </ol>

<b>Strategy 4: Develop resiliency responses to the “future of work”</b>		
<b>Strategy Plan Actions</b>	<b>City Activity and Investments</b>	<b>JCRT Board Investments</b>
<ol style="list-style-type: none"> <li>1. Build citywide capacity to understand, simulate, and prepare responses to future employment and economic scenarios</li> <li>2. Support city education and training partners to</li> </ol>	<ol style="list-style-type: none"> <li>1. City of Somerville deepened partnership with MassHire Department of Career Services and plan to leverage this resource going forward.</li> </ol>	<ol style="list-style-type: none"> <li>1. Board determined no additional investments needed at this time with the resources we can utilize from MassHire Department of Career Services.</li> </ol>

integrate “skill resilience” into career preparation	2. None at this time.	2. Northstar Digital Literacy Training provided for SCALE.
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### Section 3: Funding Allocations for Year Two

In year two, the board continued to allocate funds based on the investment priorities outlined for Year One in the January 28, 2020, meeting and began allocating funds based on Year Two investment priorities as determined during the March 9, 2021, meeting. *Tables 2 and 3* below summarize the board's investment priorities and allocations for year one and two, respectively. The allocated amounts are what the board has agreed will be available to fund that priority, and the committed amounts are what has been committed to specific organizations through a grant approval process and contract.

**Table 2: JCRT Board Year One Investment Priorities and Allocations**

Rank	Investment Idea	Approved Allocation	Committed Amount
#1	Wage Theft/Worker Rights and Responsibilities Training + HR and Job Quality Training for Small Businesses	\$200,000	\$119,000
#2	Coordination and Data Collection City Staff Position	\$95,000	
#3	Contextualized Education for Adult and English Language Learners	\$250,000	\$368,933
#4	Industry-Specific Training Programs	\$600,000	\$380,229
#5	Rapid Response Strategy	\$40,000	
#6	COVID-19 Emergency Fund <sup>3</sup>	\$100,000	\$77,747
#7	A Somerville Public Schools (SPS) and Bunker Hill Community College (BHCC) program to provide one year of pre-college courses, career coaching, and work experience for Somerville High School (SHS) graduates not going directly to college ("Year 13" program) <sup>3</sup>	\$75,000 <sup>3</sup>	
#8	Career Navigation Resources		
#9	Professional Development for Adult Education Teachers and Workforce Professionals in Somerville		
	A Somerville Public Schools (SPS) - Bunker Hill Community College Pell Grant gap funding and college counseling program		
Total JCRT Budget (2019-2020 Funds Generated)		\$1,363,754	
Total		\$1,360,000	\$945,908
Remaining Uncommitted JCRT Funds			\$417,845

<sup>3</sup> SPS and BHCC submitted a proposal to the JCRT board for this program. During discussions between SPS and the JCRT board on this proposal, the coronavirus pandemic hit, disrupting forward movement on this priority until operations at SPS and BHCC normalize.

**Table 3: JCRT Board Year Two Investment Priorities and Allocations**

<b>Rank</b>	<b>Investment Idea</b>	<b>Approved<sup>4</sup> Allocation</b>	<b>Committed Amount</b>
#1	Industry-Specific Training Programs	\$381,000	
#2	Childcare Career Advancement Initiative	\$150,000	
#3	Wage Theft/Worker Rights and Responsibilities Training	\$89,000	\$89,000 <sup>5</sup>
#4	Contextualized Education for Adult and English Language Learners	\$369,000	\$250,000
	<b>Previously Authorized</b>		
-	Quality Job HR Training for Somerville Small Businesses and Entrepreneurs	\$81,000	
-	Coordination and Data Collection Staff Position	\$23,750 <sup>6</sup>	\$47,500
-	COVID Student Emergency Fund	\$22,000	\$22,000
-	Forsyth Student Scholars Program	\$4,000	\$4,000
Total JCRT Budget (2019-2020 Unspent Funds + 2020-2021 Funds Generated)			\$417,845
Total		\$1,119,750	\$412,500
Remaining Uncommitted JCRT Funds			\$5,345

<sup>4</sup> The Board decided to allocate these funding amounts based on anticipated \$715,920 in linkage fees projected in FY21.

<sup>5</sup> This amount was proposed but is pending approval as of the writing of this report.

<sup>6</sup> This amount was proposed to cover the JCRT's portion for 6 months, however it has been re-calculated in the subsequent column to reflect the JCRT's annual funding commitment to this role.

## Appendix A:

### JCRT Board Year Two Investments Detailed Descriptions of Programs and Grants

#### Continued Adaptation in Response to COVID-19

Throughout the year, Somerville's JCRT grantees, low-income workers, and job seekers continued to face the ongoing challenges of the COVID-19 pandemic. In addition to granting over \$77,747 in COVID-19 emergency funds to vital community organizations in 2020, the JCRT board has supported grantees through successful adaptations and improvements to service delivery. The Welcome Project, for example, broadcasted their workshops on Facebook Live enabling them to reach a larger audience than would've been possible in an in-person setting. Also, Just-A-Start adapted their curriculum by providing participants with hands-on lab and technology kits they could use from the safety of their homes. These are just two of the many pivots that took place. Given ongoing considerations about the safety of, and alternatives to, in-person learning, this year gave grantees the opportunity to broaden their networks, recruitment streams, and agility of their programs.

#### Strategy 1: Build a coordinated system of education and training services that ensures Somerville youth and adults achieve their career goals

1. *Description:* The JCRT and the City of Somerville began sharing the cost of a new full-time Workforce Development Coordinator to assist the Senior Planner in managing the City's workforce development portfolio. The JCRT board has committed to two years of funding for this position (at 50% cost share).

*Year One Investment:* \$47,500 contributed by the JCRT (additional \$47,500 contributed by City)

*Year Two Investment:* \$47,500 contributed by the JCRT (additional \$47,500 contributed by City)

\$95,000 – Total JCRT contribution

*Timeline:* Staff person began in August 2021.

2. Adult Education and Industry Specific Training Programs:

- a. *Description:* Per Scholas will provide training and job placement services to 15 Somerville residents in technology training programs including program cycles of their Amazon Web Services re/Start, TEKsystems program End-User Desktop Support, Software Engineer, and IT Network/IT Support trainings. Essential business skills training, financial security strategies training, and access to a Navigator on staff will also be provided to students to ensure success in the program and in employment. Stipends of \$1,000 will be provided to all students.

*Investment:* \$66,706.07

*Timeline:* August 1, 2020, through January 31, 2022. Board granted a no cost extension through January 2022 at the request of the grantees to recruit and place more participants.

- b. *Description:* Just-A-Start (JAS) will provide training and job placement services to 5 Somerville residents in its Biomedical Careers and IT Careers programs. Stipends of \$7,000 to \$9,000 will be provided to students based on need.  
*Investment:* \$113,523  
*Timeline:* August 2, 2020, through November 30, 2021.
- c. *Description:* The Asian American Civic Association (AACA) will provide training and job placement services to 20 Somerville residents in the following programs: the Building Energy Efficient Maintenance Skills (BEEMS) program, the Careers in Banking and Finance (CBF) program, and the Green Automotive Maintenance Skills (GAMS) program. AACA will offer three cycles of the CBF program, two cycles of the BEEMS program, and two cycles of the GAMS program. Stipends of \$50 per week will be provided to students depending on need.  
*Investment:* \$200,000  
*Timeline:* September 1, 2020, through March 31, 2022. Board granted a no cost extension through March 2022 at the request of the grantees to recruit and place more participants.
- d. *Description:* Bunker Hill Community College (BHCC) will partner with three Somerville social service agencies, East Somerville Main Streets (ESMS), the Community Action Agency of Somerville (CAAS), and The Welcome Project (TWP). This partnership will provide approximately 100 low-income Somerville adults with multiple levels of English as a Second Language (ESL) classes, a specially designed ESL course contextualized to teach essential customer service training concepts, and wrap-around services, such as help with enrolling for public benefits and referrals to specialized health and mental health services, to support student success. Participants will also receive assistance with career navigation, guidance, and essential job placement skills, including resume development, interviewing skills, and visits to the MassHire Metro North Career Center.

*Year One Investment:* \$250,000

*Year Two Investment:* \$250,000

*Timeline:* July 1, 2020, through June 30, 2022<sup>7</sup>

*“(BHCC provides) good opportunities to improve ourselves and succeed in a second language!”*

*- Participant in BHCC’s ESL program*

- e. *Description:* The Somerville Center for Adult Learning Experiences (SCALE) will provide remote career readiness and digital literacy classes in its English language learner and adult basic education programs. SCALE will strengthen its existing English language learning and adult basic education programs by integrating skill/career navigation, goal setting, and social-emotional and other wraparound supports. Education and Career Advisory (ECA) staff will provide support services including coaching and mentoring, assistance with childcare

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<sup>7</sup> Contract was renewed for \$250,000 in July 2021.

needs or issues related to housing, transportation assistance, or assistance with fees required to complete their certification. Services will be offered to 60 students.

*Investment:* \$118,933

*Timeline:* September 1, 2020, through March 31, 2022. Board granted a no cost extension through March 2022 at the request of the grantees to recruit and place more participants.

### **Strategy 2: Position Somerville as a national leader in employee engagement practices**

1. No investments were made at this time.
2. *Description:* The Welcome Project, the Brazilian Workers Center, and the Massachusetts Coalition for Occupational Health and Safety to develop and implement workers' rights and wage theft education for immigrant workers in Somerville. This program will educate workers and communities members about the updated Wage Theft Ordinance, as well as other critical worker rights such as safety, protection from discrimination and harassment, and paid leave  
*Investment:* \$119,000  
*Timeline:* August 30, 2020, through August 30, 2021.

*“Brenda, Mila, and Francisca are excellent facilitators, many thanks for your efforts and dedication to the defense and education of our rights...”*

- Participant from *The Welcome Project*

### **Strategy 3: Build a full suite of experiential learning opportunities for Somerville youth and adults**

1. Experiential learning opportunities are included in the curriculums of the three industry specific training programs funded by the JCRT and described under Strategy 1.
2. *Description:* The Forsyth Student Scholars Program is an eight-week paid internship opportunity in the field of medicine and research. This program is for exceptional Massachusetts high school students from underrepresented backgrounds, who identify as economically disadvantaged, or attend school in underserved communities. Forsyth relies on sponsoring organizations and private donors to fund these paid internship opportunities. THE JCRT contributed \$4,000 to make this experiential learning opportunity available to one Somerville High School student.  
*Investment:* \$4,000  
*Timeline:* Summer 2021

### **Strategy 4: Develop resiliency responses to the “future of work”**

1. *Description:* SCALE utilized Northstar Digital Literacy to teach digital literacy to 350 adult learners. This represents just a portion of funding toward SCALE's broader strategy of providing three remote career readiness courses to English language learner and adult basic education students.  
*Investment:* \$1,500  
*Timeline:* September 1, 2020, through August 31, 2021.