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Documentation plan for Roxbury Multi-Service Center

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University Archives and Special Collections Department

**Documentation Plan
for
Roxbury Multi-Service Center**

INTRODUCTION

This plan is intended to help *Roxbury Multi-Service Center (RMSC)* effectively manage and transfer selected organizational records to the *Northeastern University Archives*. It identifies groups of documents to be preserved based on activities deemed significant as evidence of RMSC functions.

The plan consists of three sections:

- ANALYSIS OF THE ORGANIZATION
- LIST OF DOCUMENTATION GOALS AND SELECTED RECORDS
- METHODS FOR RECORDS TRANSFER

Although this documentation plan identifies specific records and outlines methods for their management and transfer, it should not be considered static or unchangeable. When needed, the plan should be updated to reflect changes in RMSC's function, programs, and mission and the records they generate.

SECTION ONE: ANALYSIS of Roxbury Multi-Service Center

To provide context for records selection, this analysis consists of brief descriptions of RMSC's:

- History and culture
- Mission and functions
- Current organizational units
- Control of the institution
- Interaction with other institutions
- Comparison with other institutions of the same type

History and Culture

In 1963, staff at Action for Boston Community Development (ABCD), notably Robert (Bob) Pearlman, along with community leaders including Gertrude Cuthbert, Helen Y. Davis, Judge Harry Elam, and Hubert (Hubie) Jones, developed a plan for a "one-stop" service center servicing the needs of individuals and families in the predominantly African American areas of Roxbury, North Dorchester and Mattapan. This model was intended to improve access by centralizing specialized services for health, welfare, employment, education and legal aid at a neighborhood location in order to remove impediments for those needing help. RMSC was originally one of three neighborhood multi-service centers funded as a three-year demonstration by the Ford Foundation, the Office on Juvenile Delinquency of the federal Department of Health, Education, and Welfare with grants funneled through ABCD, United Community Services (now the United Way), and the Permanent Charity Fund. RMSC incorporated on November 13, 1964, and Gertrude Cuthbert was its first executive director. On October 3, 1965, RMSC opened at 317 Blue Hill Avenue in Dorchester, Massachusetts.

RMSC's initial focus was on crisis intervention at the family or individual levels. This focus soon expanded to combating systems of oppression, particularly under the leadership of Hubert Jones, who succeeded Gertrude Cuthbert as executive director in 1967. In addition to crisis intervention, programs (such as the Sav-More Neighborhood Association) began advocating community development. This shift also included the creation of the Task Force on Children in 1968, whose report *The Way We Go to School: The Exclusion of Children in Boston* resulted in the passage of Chapter 766, legislation guaranteeing public funding for educational needs to every child in Massachusetts. This statute was the basis for Public Law 94-142, a federal law guaranteeing the same right to all American children.

Percy Wilson became executive director in 1971. Wilson was succeeded by Marilyn Anderson-Chase in 1978, Ricardo Millet in 1983, and Shirley Carrington in 1985. Carrington held the position until 1993. Throughout the 1980s, staff at RMSC self-identified as a nexus of black community power. In 1972, La Alianza Hispana organized under the aegis of RMSC. La Alianza Hispana, however, became a separate entity focused on the local Latino/a population.

After the early 1990s, RMSC began emphasizing the multicultural context of its services to communities of color. Valerie Graham assumed directorship from 1993 to 1995, and was followed by Zuline Allen, who held the position from August 1995 to March 1997. Brenda Gadson, the most recent executive director, led RMSC from 1998 to 2005. Diana Thompson served as interim executive director until October 31, 2005.

RMSC has expanded from a single building to include the John D. O'Bryant Community Youth Center at 434 Warren Street in Dorchester, and the RMSC Family House Shelter at 252 Columbia Road. RMSC aims to provide a holistic approach to "front-line" service delivery through extensive networking with various community, government, and business partners. Programs focus on a range of issues affecting adolescents, families, and communities, including youth enrichment programs, technology centers and training, scholarships, internships for minority graduate students in social work and psychology, support for victims of sexual assault and violence prevention, programs for seniors, counseling and mental health, emergency aid to pay utility bills, shelters, and community advocacy. RMSC serves more than 6,000 individuals every year, employs over 60 staff full-time, and has an annual budget of \$2.8 million. Funds primarily channel through the United Way and other private or government contracts and grants, with additional minor revenue from investments.

This information was taken from the following sources:

- Action for Boston Community Development: Roxbury Multi-Service Center, website, <http://www.bostonabcd.org/people/rmsc.htm>. Accessed 11/7/05.
- Roxbury Multi-Service Center, 2002 Annual Report, "Partnering for Excellence: Roxbury Multi-Service Center, Inc." Northeastern University Archives and Special Collections, M109, Roxbury Multi-Service Center collection. Located in Administrative Series, Box 1.
- Roxbury Multi-Service Center, 1964-1984, An Anecdotal History: 20th Anniversary Celebration," 1984. Northeastern University Archives and Special Collections, M109. Located in Administrative Series, Box 1, Folder 6 (Agency History: General, n.d., 1978, 1984-1985).
- Roxbury Multi-Service Center, "Report of Operations: January 1 – December 31, 1965," 1966. Prepared by Gertrude Cuthbert, Executive Director. Northeastern University Archives and Special Collections, M109, Roxbury Multi-Service Center collection. Located in Administrative Series, Box 1, Folder 8 (Agency History: Report of Operations, 1965-1966).
- Roxbury Multi-Service Center, website, <http://www.roxmulti.org>. Accessed 11/7/05.
- Dawn Swan, "The Natural History of a Professional Reform Organization: Roxbury Multi-Service Center," 1979. Northeastern University Archives and Special Collections, M109. Roxbury Multi-Service Center collection. Located in Administrative Series, Box 1, Folder 5 (Agency History: General, n.d., 1967-1968).

Mission and Functions

"Our mission is to define and continuously expand the art of building family and community through quality programs, services and partnerships."

RMSC performs four basic functions:

1. Administration and Development

This includes governance, policy development and implementation, payroll and employee benefits programs, employee training, fiscal operations, facilities maintenance and security, contracting, grant management, fund-raising and budget coordination.

2. Direct Service Provision

These services and their delivery emphasize the “front-line,” often crisis intervention aspect of RMSC. They include emergency financial assistance or shelter, family or individual counseling and support. The employees in these departments are primarily social workers, case managers, or shelter workers, though title and function will correspond to the service provided.

3. Community Programs

These programs may be considered ‘indirect’ services. They include a number of youth and education programs, technology training and services, scholarships and fellowships, senior groups, and substance abuse and violence prevention programs.

4. Community Advocacy

In addition to direct service delivery and programs, groups and individuals affiliated with RMSC participate in activities advocating systemic change on issues affecting the community or people of color. These activities include task forces, efforts to educate legislators, conferences, and neighborhood revitalization projects.

Current Organizational Units

The **Executive Director** is the chief executive officer responsible for the daily administration, maintenance, and development of RMSC. She oversees various internal departments and acts as liaison to the Board of Directors. She heads the **Administration** department, which includes the offices of Assistant Executive Director, Program Development Specialist, and Executive Assistant. Along with the Executive Director, the Administration department is responsible for public relations, RMSC administration filing systems, maintaining up-to-date information on key community organizations and individuals, maintaining files on committee activities, and preparing annual reports.

The **Chief Financial Officer** heads the **Finance Department**, and is responsible for establishing budgets and coordinating and filing RMSC financial transactions, including billing and employee payroll. The Finance Department includes the Senior Accountant, the Billing coordinator, the Human Resources Coordinator, and an Administrative Assistant.

Various department **Directors** supervise the daily operations of RMSC programs and centers. They coordinate social workers, case managers, shelter workers, team leaders, and volunteers, as appropriate to the specific department. Each department may administer numerous programs.

The **Board of Directors** is legally and financially responsible for RMSC. The Board maintains legal documents related to the institution as a whole, and directs organizational development.

Control of Institution

Roxbury Multi-Service Center, Inc. is an independent, non-profit 501 (c) (3) organization with an annual budget of over \$2.7 million. It is overseen by a board of directors and is funded by the United Way, various government agencies at the city, state and federal level, private contracts and grants, and investments. Through contracts, grants, and organizational partnerships, RMSC provides services and scholarships to members of the Roxbury, Dorchester, and Mattapan communities.

Interaction with Other Institutions

RMSC has cooperative, contractual, and contributor relationships with numerous government, corporate, and private organizations. The specific institutions vary as funding sources and projects change. This is an abbreviated list highlighting some historically significant partners. For a more complete list, please see the Roxbury Multi-Service Center collection finding aid: <http://www.library.neu.edu/archives/collect/findaids/m109find.htm>.

The United Way remains a significant source of funding. RMSC has also continued its close relationship with Action for Boston Community Development (ABCD) as an ABCD affiliate. In addition, RMSC collaborates with numerous social work and psychology graduate schools, community mental health agencies. Other significant partners include the Timothy Smith Fund, Associated Grant Makers

(Massachusetts), Boston University, Boston Private Industry Council, Project R.I.G.H.T, Inc. (Rebuild and Improve Grove Hall Together), and the Blue Hill Avenue Initiative Task Force.

City of Boston grant sources and collaborative partners include the Public Facilities Department, the Boston Redevelopment Authority, and the Office of Community Partnerships (now part of Boston Centers for Youth and Families). Commonwealth of Massachusetts collaborators include the Department of Mental Health, the Department of Education, the Department of Public Health, the Department of Public Welfare, the Department of Transitional Assistance, and the Department of Youth Services. Federal funders include the U.S. Department of Education, the Department of Health and Human Services, the Department of Housing and Urban Development, the Environment Protection Agency, and Federal Emergency Management Agency.

Comparison with Institutions of the Same Type

RMSC was part of a wave of programs initiated during the War on Poverty era of the early 1960s. It was one of three Boston neighborhood multi-service centers founded at the same time by Action for Boston Community Development (ABCD). One of these centers, the Shawmut Neighborhood Center in the South End, no longer functions. The other, the John F. Kennedy Family Service Center (JFKFSC) in Charleston is still in operation. Unlike RMSC, JFKFSC operates directly under the aegis of Action for Boston Community Development (ABCD). JFKFSC initially emphasized providing Head Start and employment programs but has expanded to include child care, substance abuse counseling, community services for immigrants, and ethnic- and age-based programs. Like RMSC, JFKSC emphasizes family-focused services and its strong ties to the local community.

RMSC based its original organization on the settlement house model. In 1960, four other Boston area settlement houses (South End House, Hale House, Lincoln House, Harriet Tubman House, and Children's Art Centre) merged to form United South End Settlements. United South End Settlements provides many of the same services as RMSC, with an additional emphasis on arts and culture.

East Boston Social Centers, Inc. is another multi-service agency established on the settlement house model. East Boston Social Centers, Inc. incorporated in 1918, again as a merger of predecessor agencies. East Boston Social Centers functions in a similar manner to United South End Settlements and provides similar services. However, the merged structure of these two institutions highlights one way RMSC is somewhat unique, having remained an independent multi-service agency.

SECTION TWO: DOCUMENTATION GOALS AND SELECTED RECORDS

RMSC functions will be documented as they relate to its continued role as a social justice organization serving the needs of Boston's under-represented communities. Records selection was based on their historical significance, research value, and the administrative and legal needs of the organization. Emphasis has been placed on records documenting RMSC administration, program planning and operations, and fiscal development. Access to certain materials is restricted; researchers may apply to the Northeastern University Archivist for access to this material.

Documentation Goals

The selected RMSC records will document:

1. A community response to an unmet need.
2. The development and administration of a community service and advocacy organization.
3. The impact of a community-based social service agency on area residents.
4. The evolving focus of the organization through changing programs and services, and the decision-making involved in these processes.
5. The interconnections of a non-profit organization with affiliated agencies and contractual partners.

Selected Records Series

The following RMSC records have been selected for permanent retention. Records are listed under the office presumed to have control of them. The list is suggestive rather than prescriptive, and may be altered as needed. Electronic records will be preserved where no paper copy exists.

Board of Directors

Annual reports
Annual meeting minutes
Committee minutes
Committee reports
Sub-committee minutes
Sub-committee reports
Program Directors meeting minutes
Consultant reports
Correspondence (internal and external)
Retreat minutes
Organizational charts
Member directories
By-laws

Executive Director

Cooperative agreements
Affiliated agency files
Community activity files
Budgets, annual
Grants and contracts
Fund-raising files
Policy development files and handbooks
Correspondence (internal and external)
Press releases

Assistant Executive Director

Staff newsletters
Staff meeting minutes
Staff retreat minutes
Publications (brochures, newsletters, etc)
Website
Media of or about RMSC (newspaper clippings, taped interviews, etc)

Program Development Specialist

Program Directors meeting minutes
Program Committee meeting minutes
Program reports, annual
Program proposals

Human Resources Coordinator

Job descriptions

Chief Financial Officer

Financial reports, annual
Grant and contract files

Program Directors

Correspondence (internal and external)
Events files
Memorabilia
Photographs
Program descriptions
Program reports and statistics
Program development and evaluation files

SECTION THREE: RECORDS TRANSFER

This documentation plan is devoted to the identification, retention, and transfer of **permanent historical records**. It applies to records in both paper and electronic format. It is a **general retention schedule** and does not prescribe specific time to transfer records. Rather, during a periodic review RMSC determines which files are inactive and thus ready for donation.

*Note: For a concise, practical overview of records management, please see:

An Introduction to Records Management for Non-profit Organizations by the Minnesota Historical Society, adapted by Northeastern University Libraries, Archives and Special Collections Department; Northeastern University Archives and Special Collection, "Guide to Records Management," Available at <http://www.lib.neu.edu/archives/records/index.htm>.

Step One: Distinguish Current from Non-Current Records

- Current (or "active") records are used in day-to-day operations. Nonessential documents, such as routine memos or listserv e-mail, may be destroyed immediately after use. All others are filed. However, once these files are no longer relevant to basic office functions, records become non-current (or "inactive"). Non-current records of permanent historical value should be donated to the Northeastern University Archives.
- One of the most basic records management practices is "breaking a file." To break a file, start a new folder regularly, preferably every year, and apply consistent, meaningful labels. Breaking files helps in locating information while the records are active, and in discarding or storing records after they are no longer needed. It applies to both paper and electronic documents.

Step Two: Identify At-Risk Records

- At-risk records are materials threatened by identifiable vulnerabilities. They may require different handling from records which are not at risk.
- Electronic records are always at-risk. The first step in dealing with electronic records is to encourage personnel to care for them responsibly.
- E-mail, now a dominant form of correspondence, is especially vulnerable. Listserv, routine inter-office and personal correspondence is not of long-term value and should be deleted. Official correspondence, however, should be sorted routinely (i.e. monthly) into appropriately labeled (including dates) electronic folders.
- The best course of action is to transfer a copy to the Northeastern University Archives immediately after creation. It is strongly recommended that electronic records be sent before the hardware or software on which they were created and stored becomes obsolete or degraded. This may occur as quickly as three years after the document creation date.
- To ensure permanent preservation, the Northeastern University Archives prefers open, well-documented formats such as Text (.TXT, .ASC, .RTF), Portable Document Format (.PDF), Graphics Interchange Format (.GIF), TIFF (.TIF), Joint Photographic Experts Group (.JPG), Hypertext Markup Language (.HTML, .HTM), Standard Generalized Markup Language (.SGML), and Extensible Markup Language (.XML).
- The Northeastern University Archives will also give priority to updating certain popular proprietary file formats. These include standard Microsoft applications, such as Microsoft Word (.DOC), Microsoft Excel (.XLS), Microsoft Powerpoint (.PPT); Text and LaTeX (.TEX), Visio (.VSD), and RealMedia (.RA, .RM, .RAM).
- If the same record exists in both electronic and paper form, save the paper copy rather than the electronic copy.
- Photographs and audio-visual materials are of great historical value. It is best to label them in pencil soon after their creation, so identifying information is not lost.

Step Three: Identify Records for Transfer

- This step is made possible by an efficient file labeling system. File names, particularly electronic files, should be unambiguous and reflect document content or function. As with paper records, electronic

file directories should be organized logically. It is easier to separate current from not current records if files are broken into regular intervals, such as year or month.

- Choose an annual date to review and transfer records.
- Review the documentation plan and the selected records series. Do personnel or program changes require altering the plan?
- At the specified time, each responsible party should sort through appropriate documents as indicated by the Selected Records Series in Section II. Segregate inactive files from current records. Once this is routine, the process will simply involve locating the oldest files still under RMSC control and determining which records, if any, should be exceptions to the yearly transfer.

Step Four: Create a List of Box or Disk Contents

Box and disk inventories are brief lists of the files found in a storage box or an electronic storage disk. It is easiest to create these inventories when the box or disk is filled.

Box inventories should include:

- Unique number*
- Name of the person, office, or group whose files are in the box
- Date the files were put in the box
- General description of the files, such as "Correspondence" or "Committee Minutes"
- Year-dates covered by the files
- List of folder titles (or item titles for audio-visual materials)

Disk inventories should include:

- Unique number*
- Name of the person, office, or group whose files are stored on the disk
- Dates the files were copied onto the disk
- General description of the files, such as "E-mail Correspondence" or "2004 Budget Spreadsheet"
- List of file folder or directory titles
- Name or type of computer system on which the disk was created. To aid the preservation of electronic records, it is extremely important to know what hardware and software were used to create files.
- Application software names and version numbers used to create the files

*Note: Unique numbers are needed to connect boxes and disks with their contents lists. These simple codes, such as BD-C-2004 for Board of Directors-Correspondence-2004, should be written directly on box and disk labels.

Step Five: Notify the Northeastern Archives that records are available for transfer

Once materials are ready for transfer or if you have questions, please contact the Northeastern University Archives at 617-373-2351, or email University Archivist, Joan Krizack, at j.krizack@neu.edu to schedule a pick-up time.