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## Documentation plan for Urban League of Eastern Massachusetts

Sarah-Jane M. Poindexter

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**University Archives and Special Collections Department**

**Documentation Plan  
for  
Urban League of Eastern Massachusetts**



Funded in part by the National Historical Publications and Records Commission

Prepared by Sarah-Jane M. Poindexter, July 2007

## **INTRODUCTION**

This plan is intended to help the Urban League of Eastern Massachusetts (ULEM) 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 ULEM's functions.

The plan consists of three sections:

- I: ANALYSIS OF THE ORGANIZATION
- II: LIST OF DOCUMENTATION GOALS AND SELECTED RECORDS
- III: 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 ULEM's function, programs, and mission and the records they generate.

### **I. ANALYSIS OF URBAN LEAGUE OF EASTERN MASSACHUSETTS**

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

- History and Culture
- Mission and Functions
- Current Organizational Units
- Institutional Control
- Interaction with Other Institutions
- Comparison with Other Institutions of the Same Type

#### ***History and Culture***

The Boston Urban League was founded in 1917 by community organizer Eugene Knickle Jones. Jones relocated to Boston from New York City to form a local affiliate of the National Urban League to provide settlement services for the growing population of black migrants arriving from the South and immigrants from the West Indies. The organization was incorporated in 1919 and gradually shifted its priorities to education and employment, advocating for quality education, job training, and career assistance to improve employment opportunities.

During the Civil Rights struggle of the 1950's and 1960's, the Urban League continued to operate its programs of direct service along with increased involvement in public policy, advocating for desegregation, voter education, affordable housing, and equal employment opportunity for all citizens. In the 1970's the organization reincorporated as the Urban League of Eastern Massachusetts. ULEM collaborated with the Federal government to bring Comprehensive Employment and Training Act (CETA) programs to residents of color in the Greater Boston area. The 1980's and 1990's saw ULEM strengthening its role as an advocate for the disadvantaged, adding employment and training programs and addressing drug use and violent crime.

In response to high unemployment rates and lower average earnings per person in the African American community, ULEM developed the Employment Resources Center

(ERC) in 1994. The ERC is run as a public-private partnership between ULEM and local corporations. Strengthened by ULEM's unique understanding of the cultural and social issues facing African American youth and its history of community leadership, the ERC became a successful model for community-based job training and placement.

In 1997, ULEM opened the Technology Training Institute (TTI) to provide computer skills training and technology education that would aid in employment. TTI was originally funded through a partnership with the National Urban League, Verizon, the City of Boston, and the Computer Technology Center Network, and it is part of the Timothy Smith Network of collaborative community computer technology centers which participates in a National Science Foundation sponsored research project on the impact of community technology centers.

In addition to offering direct services related to education and employment, ULEM works tirelessly to strengthen alliances and build collaborative partnerships for advocacy campaigns, civil rights empowerment, and community discourse. For example, in the aftermath of the Los Angeles riots in 1992, Joan Wallace-Benjamin, then ULEM president, and Dianne Wilkerson of the NAACP, spearheaded a community-wide organizing effort called the "Ten Demandments" which emerged as a means for dialogue and a plan of action for improving the lives of African Americans in Boston. The plan recommended specific changes in policies and programs at the city, state, and federal levels to help create jobs, improve public education, and increase access to affordable health care. Additionally, the plan challenged black community members to be responsible for and to each other, specifically declaring a war on apathy and irresponsibility.

In 2007, ULEM continues to build upon its history to provide services to African Americans and communities of color in the Greater Boston area and to advocate for economic and social equality. ULEM's office is located at 88 Warren Street in Roxbury and serves the City of Boston and Suffolk, Middlesex, Barnstable, Duke, Bristol, Essex, Nantucket, and Plymouth counties. ULEM has helped over 8,000 individuals and families receive new job skills, find gainful employment, and improve the quality of their lives.

This information was taken from the following sources:

Kaufman, Nancy. 1993. Less Talk, More Action: A new agenda for Black Jewish Relations. *Boston Review*, June-August. (accessed June 4, 2007).

Leslie, A. Ryan. 2002. The Urban League of Eastern Massachusetts Redefines Employment Direction for NSTAR Employees. *ULEM TODAY*. XII: 2.

McGroarty, Patrick. 2007. Celebrating the Urban League's growth. *The Boston Globe*, April 19, City Section.

Urban League of Eastern Massachusetts. <http://www.ulem.org/>.

Urban League of Eastern Massachusetts, 1994. *Employment Resource Center Opportunities for Investment*. Boston, MA: ULEM.

Wallace-Benjamin, Joan. 1992. The "Ten Demandments" – An Update -. *ULEM TODAY*. VI: 1

Wallace-Benjamin, Joan. 2002. President's Statement. *ULEM TODAY*. XII: 1, 4.

### ***Mission and Functions***

"The mission of the Urban League of Eastern Massachusetts is to deliver services and programs that aim to increase the economic self-reliance of African Americans and other people of color throughout our service area and to advocate for the core initiative and civil rights issues that critically affect their lives."

ULEM fulfills its mission by performing four basic functions:

#### 1. Education and Youth Empowerment

ULEM works closely with youth in middle school and high school to strengthen their Math and English skills with the goal of improving their scores on tests that determine future educational and economic opportunities. ULEM realizes this goal with a variety of parent and youth services designed to improve students' academic achievement, encourage family reading and use of public resources, provide social and recreational outlets, and empower parents both to support their children's education and to advocate for them within the public school system.

#### 2. Economic Empowerment

ULEM empowers adult learners and employment seekers to attain economic self-sufficiency through the integration of job training and sustained employment with Mathematics and English curriculum methodology. This includes professional skills training, technology training, case management, job placement assistance, job fairs, and access to an online career center.

#### 3. Advocacy and Civil Rights Empowerment

ULEM is dedicated to promoting civil rights and providing the means of empowering self-development. This is accomplished through community organizing and advocacy campaigns that address identified principles of self-sufficiency such as education, employment equity, entrepreneurship, and home ownership.

#### 4. Leverage Strengths, Partnership, and Measurement

ULEM establishes partnerships and collaborations to buttress its services and the organization of their programs, and to provide technological support. Combined effort enhances services and creates a mutually beneficial effect for ULEM, the individuals and families they serve, and the organizations with whom they partner. ULEM uses industry developed metrics to measure success.

### ***Organizational Units***

As the governing body of ULEM, the **Board of Directors** ensures that ULEM's policies, standards, practices, and procedures are in compliance with the policies and standards

of the National Urban League. The standing committees of the ULEM Board include the Nominating, Budget and Finance, Personnel, Public Policy and Advocacy, Program, and Marketing committees. These committees generate work plans, reports, requests, and recommendations for the full Board of Directors, regarding their functional areas. Board members are predominately African American professionals and Boston residents.

The **President and Chief Executive Officer** (CEO) is responsible for implementing the directives, decisions, and policies of the Board of Directors, pertaining to the administration of the ULEM office and staff, financing, and public relations. The President promotes, coordinates, and supervises ULEM's programs as well as oversees the Executive Vice President, Advocacy and Public Policy Coordinator, Development Manager, and Chief Financial Officer.

The **Executive Vice President and Chief Operating Officer** (COO) directly supervises the operations of ULEM's programs and the program coordinators. The programs are separated into three divisions: Parent and Youth Services (PYS), Employment and Career Services, and the Technology Training Institute (TTI).

The **Manager of Technology and Facilities** directs the Technology Training Institute, managing both the administrative staff and the TTI coordinator.

The **Manager of Parent and Youth Services** organizes programming for children, parents, and family members in addition to managing the PYS Education Coordinator and Program Assistant. The PYS staff coordinates youth and parent leaders, mentors, students, and educators who serve the program participants.

The **Manager of Employment and Career Services** coordinates the Employment Resource Center and the Employment and Professional Skills Training program as well as staff members who manage the intake and assessment of program participants and deliver program services.

### ***Institutional Control***

ULEM is a private, non-profit 501 (c) (3) organization with an annual budget of over \$3 million. It is overseen by the president and the board of directors and is funded through contracts, grants, donations and fees. Through organizational partnerships, contributions, grants, and contracts, ULEM provides education and employment services to African Americans and other people of color in the Greater Boston area.

### ***Interaction with Other Institutions***

ULEM has cooperative and contractual relationships with multiple cultural, educational, corporate, and government institutions. The specific institutions vary as funding sources and projects change. The following is an abbreviated list highlighting some currently significant partners.

ULEM's interaction with diverse institutions distinguishes the breadth of its employment services. For instance, ULEM's partnership with Boston Works, the recruitment services division of The Boston Globe, resulted in the founding of the BostonWorks Career Center at ULEM headquarters. ULEM and local employer NSTAR developed the business-to-business program Redefining Employment Direction (R.E.D.) to retrain

employees with new technology to prevent them from being displaced within changing companies. Additional partnerships and collaborations include ULEM's participation in the Timothy Smith Network of technology centers, the Seniors Community Service Employment Program (SCSEP) overseen by the Department of Labor's Employment and Training Administration, and a collaboration of two Boston community-based agencies, automotive employers and trainers to create the Partnership for Automotive Career Education (PACE).

Many partnerships emphasize education and skills development. For example, the ScholarshipBuilder Program, funded by Merrill Lynch and administered by the National Urban League, follows and assists first grade students until they graduate from high school and attend college or vocational school. In addition, ULEM works closely with Boston Public Schools and the Boston Public Library to help students who are at risk of dropping out stay in school, and to promote literacy, family reading, and use of library resources. ULEM uses funding from the Gillette Company to run the Community Mobilization Empowerment Project and collaborates with academic institutions such as Northeastern University to promote learning in math and the sciences.

### ***Comparison with Institutions of the Same Type***

The Urban League of Eastern Massachusetts is an independent, incorporated, non-profit organization and an affiliate of the National Urban League (NUL). Founded in 1910 in New York City, NUL is the nation's largest community-based organization that provides direct service, advocacy, and research on behalf of African Americans and other individuals of color. There are over 100 Urban League affiliates of the National Urban League which are all connected by a shared national agenda including a three-part strategy: supporting academic and social development of African American children, fostering economic self-sufficiency, and promoting racial inclusion.

As an affiliate of the NUL, ULEM must comply with rigorous NUL standards; nevertheless they have the freedom to tailor their programs to meet the needs of the local community. ULEM diverges from the NUL by placing a stronger emphasis on economic self-sufficiency via education and career development with a specific emphasis on math and English skills while NUL has a broader focus including issues of health, quality of life, and civic engagement.

ULEM has two auxiliaries: The Young Professionals Network (YPN) and The Urban League Guild. Similar to the relationship of the ULEM to the NUL, the YPN and The Urban League Guild are affiliates of the corresponding national program. These auxiliaries work to create the next generation of leaders in the ULEM movement, generate support for the local program, and secure funding.

ULEM was one of the first nondenominational agencies in Boston with the purpose of assisting black migrants. Starting with the settlement house movement in the early 1900s, there have been many community organizations in addition to ULEM that worked to serve the black population in Boston. Freedom House was established in 1949 by Muriel and Otto Snowden whose vision is still recognized today for its work to promote the long-term economic sustainability and social advancement of Boston's African American community. In 1960 the United South End Settlements (USES) was formed by the merger of four Boston settlement houses (South End House, Hale House, Lincoln House, and the Harriet Tubman House) and the Children's Art Centre. USES works with

groups at risk within the community to promote their well-being and personal growth through a variety of services such as educational and career support, while building a sense of community and equality. While the majority of the population ULES serves are lower-income residents of color, their constituents also reflect the diversity of Boston's population.

From the mid-sixties through the 1970's, Boston's African American community was deeply involved in a movement for educational reform. Operation Exodus worked to desegregate the Boston School system via busing and voluntary action. This organization was later renamed Metropolitan Council for Educational Opportunity (METCO) and continued to work for integrated and collaborative educational opportunities within the Boston School system. The Citywide Educational Coalition emerged in 1972 as a grassroots, educational reform organization aimed to help parents stay informed and active with the development of local educational policy and procedures affecting their children. During this time period, ULEM was also active in the educational reform movement all the while continuing to operate its program of direct services.

While many of the above organizations work for the same greater goal of empowering and serving Boston African Americans and communities of color, ULEM is unusual in its affiliation with a national organization that provides channels of support through leadership, shared vision, and experience.

## **II. DOCUMENTATION GOALS AND SELECTED RECORDS**

ULEM 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 and research value. Emphasis has been placed on records documenting ULEM administration, program planning and operations, and fiscal development. Access to certain materials may be restricted; researchers may apply to the Northeastern University Archivist for access to this material.

### ***Documentation Goals***

The selected ULEM 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 Boston African Americans and other residents of color, programs participants, and the greater Boston area.
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 Record Series***

The following ULEM 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 meeting agendas, minutes, attachments, and reports  
Articles of incorporation and by-laws  
Annual reports  
Annual budgets  
Audit reports  
Correspondence (internal and external)  
Organizational charts  
Consultant reports  
Personnel manuals  
Retreat minutes and reports  
Standing and ad hoc committee agendas, minutes, attachments and reports  
Strategic planning documents  
Material documenting ULEM's organizational policies and programs

### **President**

Curriculum development files  
Correspondence (internal and external)  
External relations  
Fundraising files  
Grant and contracts files including funding from National Urban League  
Meeting minutes and notes  
Program development  
Staff lists and job descriptions  
Workshops and training files  
National Urban League material directly relating to ULEM's programs, and organizational policies  
Consultant and other reports relating to ULEM

### **Urban League Guild**

Annual Budgets  
By-laws  
Calendar of events, invitations, publicity, flyers, and audio-visual material  
Correspondence (internal and external)  
Committee meeting agendas, minutes, attachments and reports

### **Development**

Annual budget  
Correspondence (internal and external)  
Invitations, publicity, memorabilia and audio-visual material of fund-raising and other special events  
Brochures and flyers  
Newsletters  
Newspaper clippings relating to ULEM

### **Finance**

Auditor's reports

Annual budgets  
Financial Statements (annual)  
Proposals, grants, and contracts  
Correspondence (internal and external)

### **Programs**

Audiovisual materials  
Brochures and flyers  
Correspondence  
Curriculum, class schedules, and teaching material  
Development and planning  
Program evaluations  
Meeting agendas and minutes  
Mentor journals and reports  
Newspaper clippings relating to specific programs  
Program descriptions  
Program newsletters  
Proposals, grants, and contracts  
Reports and statistics  
Rules and policies  
Staff and peer leaders workshops and training materials

### **III. Methods for 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 a specific time to transfer records. Rather, during a periodic review ULEM 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://hdl.handle.net/2047/d10000124>.

#### **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. Once these files are no longer relevant to basic office functions, however, 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 are 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.
- Photography and audio-visual materials are of great historical value. It is best to label them in pencil soon after creation, so identifying information is not lost.

### ***Step Three: Identifying 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 selected record 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 ULEM 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”
- Years or dates covered by the files
- List of folder titles (or item titles for audio-visual materials)

**Disk Inventories** should include:

- Unique number
- Name of 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 Joan Krizack, University Archivist, at [j.krizack@neu.edu](mailto:j.krizack@neu.edu) to schedule a pick-up time.