



University Archives and Special Collections Department

**Documentation Plan
for
Sociedad Latina**



Prepared by Sarah-Jane M. Poindexter, May 2007
Funded in part by the National Historical Publications and Records Commission

INTRODUCTION

This plan is intended to help Sociedad Latina 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 Sociedad Latina'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 Sociedad Latina's function, programs, and mission and the records they generate.

I. ANALYSIS OF SOCIEDAD LATINA

To provide context for records selection, this analysis consists of brief descriptions of Sociedad Latina'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 oldest Latino organization in Boston, Sociedad Latina is situated on Tremont Street in Mission Hill and is dedicated to serving Latina / o youth in the greater Boston area. In 1968, Jorge Rivera founded Sociedad Latina with the intent of creating a community-based social club that would assist newly arrived immigrants from the Caribbean. With time, social and recreational support has narrowed to focus on young people, while expanding to include comprehensive human services and resources. Sociedad Latina works to empower and support Latino youth and their families by combining direct service programs with advocacy, information, and referral services.

In the mid-1990s, a serious fiscal crisis emerged due to Sociedad Latina's over-reliance on public sector funding. The organization suffered from severe budget cuts enacted by the City of Boston and the Commonwealth of Massachusetts, enduring the crisis only through downsizing its operations. In 1992, a committee comprised of Sociedad Board and staff members, and consultant Alan Brickman of Levine Associates created a long-term strategic plan. The plan sought to strengthen and develop Sociedad Latina through rebuilding the organization, focusing on services to youth, board development, and funding diversification. With limited funding and resources for developing new programs, Sociedad Latina emphasized collaboration and referral services in order to expand its ability to provide services directly to its clients. The establishment of these strong

channels of collaboration and networking has become integral to Sociedad Latina's delivery of a variety of services to meet the diverse needs of its community.

In 2002, Sociedad Latina's work with Jamaica Plain Parent Organizing Project (JPPOP), led to the preparation and mobilization of over 400 people to oppose the UNZ Initiative (Ballot Question 2) which sought to eradicate bilingual education. Though the initiative won statewide, it was defeated in Boston, sending a clear message to City government.

The Boston Tobacco Advocacy Project (BTAP), a collaboration founded by Sociedad Latina with the Hyde Square Task Force and the Whittier Street Health Center, worked to bring attention to tobacco advertising aimed at youth and the availability of tobacco to youth. BTAP Youth Community Organizers mobilized Boston youth and families to advocate for tobacco policy change and the reinstitution of tobacco control programming. In 2004, the Youth Community Organizers authored an amendment that was passed by the City Council. The amendment strengthened the fines for selling to minors and doubled merchant tobacco permit fees, calling for the investment of the revenue into educational programs for Boston youth on the dangers of tobacco. In 2005, the Boston Public Health Commission awarded the Youth Organizers with the Public Health Hero Award.

This information was taken from the following sources:

Sociedad Latina, <http://www.sociedadlatina.org/>. (Accessed January 25, 2007).

Then, Jose, "Grantee Profile: Sociedad Latina," Boston Parent Organizing Network. <http://www.bpon.org/grants/profiles/sociedad.asp> (accessed January 18, 2007).

"Sociedad Latina Collaborates through the Boston Youth Services Network," Boston After School & Beyond, http://www.bostonbeyond.org/feature/featured_program_sociedadl.php (accessed January 18, 2007).

Sociedad Latina Strategic Plan. Boston, MA: Sociedad Latina, 1992.

Mission and Functions

Sociedad Latina works in partnership with Latino/a youth to increase the overall well being of the Latino community by delivering programs that encourage community leadership through educational attainment, cultural identity, and continuation of traditions.

Sociedad Latina fulfills its mission by performing four basic functions:

1. Education

Sociedad Latina collaborates and coordinates with local middle schools and teenage peer tutors to provide students with academic support and exposure to creative and artistic programming. Additionally, the agency organizes a summer program offering creative and recreational activities for local youth. Sociedad Latina's high school tutorial program encourages Boston youth to stay in school, graduate, and attend college by providing homework assistance, tutoring services, and study spaces. The agency also

partners high school seniors with mentors who will assist them with college planning, applications, SATs, and financial aid.

2. Workforce Development and Career Exploration

Sociedad Latina places youth in internships related to the healthcare and technology fields. The agency offers bilingual computer literacy programs to adults and operates a community computer center.

3. Community Organizing and Empowerment

Sociedad Latina coordinates meetings, workshops, support programs, and advisory groups that work to strengthen Latino / a involvement in the community. The agency builds community leadership by empowering youth and families to improve their leadership skills and become active in their communities, identifying community issues and seeking solutions.

4. Culture and Creative Exploration

Sociedad Latina organizes community-wide arts and cultural events for the youth and families they serve. The agency promotes cultural identity and pride through recreational, artistic, cultural programming, as well as performance and mentorship.

Organizational Units

As the governing body of Sociedad Latina, the **Board of Directors** is responsible for policy-making, oversight of agency operations, and fundraising. The standing committees of the Sociedad Board, Executive, Fundraising, and Finance, generate work plans, reports, requests, and recommendations for the full Board of Directors regarding their functional areas. Board members are predominately Latino professionals and Mission Hill residents.

The **Executive Director** is responsible for the daily administration, development, growth, and maintenance of Sociedad Latina and acts as a liaison to the Board of Directors. The Executive Director oversees the Program Director, Financial Consultant, and Coordinator of Development and Communications in addition to directly managing the Painter's Union Apprenticeship Program.

The **Program Director** supervises the operations of Sociedad Latina programs and the program managers.

Various program managers organize the operations of Sociedad Latina programs and centers. Managers include the Arts and Cultural Programming Coordinator, the Educational Coordinator, Community Organizers, a Career and Employment Specialist, and a Technology Manager. The program managers coordinate youth and parent leaders, mentors, students, and educators who serve the program participants.

Institutional Control

Sociedad Latino is a non-profit, community-based organization. The organization relies on funding from both private and public sources as well as the service of hundreds of volunteers.

Interaction with Other Institutions

Sociedad Latina interacts with many organizations in the course of its numerous collaborative programs, referral services, and community organizing activities. As part of the Boston Youth Services Network, Sociedad Latina contributes to a portfolio of youth services. The agency works closely with the Boston Public Schools, particularly those in the Mission Hill area, to offer tutoring, mentorship, and academic support services. Sociedad Latina also collaborates with local health and technology institutions to provide career exploration and job preparedness through paid internships at facilities such as Brigham and Women's Hospital, Beth Israel Deaconess Medical Center, Forsyth Institute, Harvard School of Public Health, New England Baptist Hospital, Dana Farber Cancer Research Institute, Children's Hospital, and Whittier Street Health Center.

Sociedad Latina's Youth Community Organizers participate in the Boston Redevelopment Authority's Impact Advisory Group for Mission Hill developments projects. The Youth Community Organizers also collaborate with Hyde Square Task Force and the Whittier Street Health Center as part of the Boston Tobacco Advocacy Project, and with Mission Safe and District B-2 police officers to build positive relationships between local youth and police.

Sociedad Latina has cooperative, contractual, and contributor relationships with numerous funding organizations. The specific institutions vary as funding sources and projects change; nevertheless, an abbreviated list includes the Barr Foundation, Children's Hospital, Harvard After School Initiative, Liberty Mutual Foundation, United Way of Massachusetts Bay, and Wellington Management Charitable Fund.

Comparison with Institutions of the Same Type

Sociedad Latina is one of many non-profit, community-building organizations in Greater Boston. It is also one of a number of organizations, such as La Alianza Hispana, Concilio Hispano, and the Citywide Boston Hispanic Center, particularly concerned with the needs of the Boston Latino/a community and Latino/a immigrants. La Alianza Hispana and Concilio Hispano are both community-based organizations offering wide-ranging services to the Latino/a community yet they distinguish themselves by the neighborhoods which they serve and particular programs offered. Located in Roxbury, La Alianza Hispana offers extensive services and resources such as ESL and technology training in addition to providing senior services. With locations in Cambridge, Somerville, and Chelsea, Concilio Hispano distinguishes itself by a variety of programs and services, including interpreting and translation services. The Citywide Boston Hispanic Center, also a neighborhood-based, non-profit organization, focuses on employment and training opportunities in civil services and serves as a resource center for its clients.

All of these organizations, including Sociedad Latina, share the goal of advancing Latinos, fostering education and leadership, and celebrating cultural identity. Sociedad

Latina, however, is unique in its particular focus on Latino youth. While there are institutions similar to Sociedad Latina in Boston, no other institution compares in its focus on Latino youth.

II. DOCUMENTATION GOALS AND SELECTED RECORDS

Sociedad Latina 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 Sociedad Latina 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 Sociedad Latina 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 Mission Hill residents, Latino/a youth, 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 Sociedad Latina 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

Agendas
Articles of incorporation & by-laws
Annual meeting minutes and notes
Annual reports
Budgets & financial documents
Correspondence (internal and external)
Legal files
Organizational charts
Outside consultant reports
Retreat minutes, notes, and reports
Standing committee minutes, notes, and reports
Strategic planning documents

Executive Director

Audit reports
Curriculum development

- Conferences
- Correspondence
- External relations
- Fundraising files
- Grants and contracts files
- Minutes
- Policy development files
- Program development
- Program referrals
- Reports
- Staff lists and job descriptions
- Workshops and training files

Financial Consultant

- Correspondence
- Grants and contracts
- Meeting notes
- Proposals
- Reports

Coordinator of Development and Communications

- Correspondence
- Fundraising planning
- Meeting notes
- Reports
- Memorabilia, photographs, press clippings, videos, posters, and invitations relating to special events

Programs

- Audiovisual materials (photographs and videos)
- Brochures and flyers
- Correspondence
- Curriculum
- Development and planning
- Meeting minutes
- Mentor journals and reports
- Newspaper clippings (relating to programs)
- Program descriptions
- Program newsletters
- Reports and statistics
- Rules and policies
- Staff lists
- Staff and peer leaders workshops and training

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 Sociedad Latina 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 Sociedad Latina 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 to schedule a pick-up time.