

# Project Plan – BCBSF History and Archive Project

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## Goals

- Preserve our company’s heritage
- Communicate our company’s story to stakeholders, including employees, board of directors, retirees, customers and the public
- Leverage our company’s past to facilitate better decision-making for the future
- Build a corporate archives, including photographs, documents, publications and memorabilia
- Initiate oral histories to preserve corporate memories from a generation of retirees and long-time employees
- Establish a process to catalogue and continually gather current and future company material
- Gain an appreciation of the corporate culture, understanding of the company’s accomplishments and an appreciation of those who contributed to the development of the business
- Establish an official corporate archive within the Business Research Information Center

## Major Project Components

- Official Corporate Archive
- Request Memorabilia from Key Stakeholders
- Capture Oral Histories
- Establish Policies and Procedures for Gathering Materials
- Identify Opportunities to Use History and Archives

## Action Plan

Action Step	Responsibility	Timing	Status

## Background/Current Situation

In response to a request from the Office of the President, a work group is looking at ways to capture the company's history including oral histories from former Board members and selected retired officers and employees. This project is part of a larger issue that BCBSF needs to address. More and more companies are learning to leverage the present value of their corporate pasts. They see history as both an asset and a process, and they integrate their on-going history programs into every facet of company operations: marketing, training, employee and public relations, records management, business development and strategic planning (see Appendix 1, list of companies with Corporate Archives Departments in our industry).

Many begin by building a corporate archive. They collect photographs, documents, publications and memorabilia, and initiate oral history interviews to preserve the corporate memory. With these key assets in place, they respond to any variety of ongoing business needs with specific historical projects – exhibits, management case studies, advertising copy, executive speeches, training materials, analytical reports on historical trends in markets and technology, and corporate history books.

The Business Research Information Center (BRIC) proposes to take the lead for an archive program that ensures appropriate and permanent care for records of historical value. The BRIC has the experience, training and technology to make these materials available for use both now and in the future. Since 1981, the BRIC has collected, indexed, preserved and housed a variety of corporate historical documents including a collection of company newsletters from the 1950s to the present; various departmental research reports; speeches; news articles; other miscellaneous print documents and in-house videos. Additionally, in 1999, BRIC took responsibility for a large corporate photo collection.

Although BRIC staff attempt to locate and catalog documents resulting from major corporate projects, these important records are frequently discarded by the owners when projects are completed or employees retire or leave the company. While many employees see the BRIC as the “unofficial” BCBSF archives, its ability to capture the historical record of the company is limited by the small size of its staff and the lack of a corporate policy designating the BRIC as the official archives. We are currently unable to dedicate the resources to make the archives meaningful and useable as well as meet our current commitments to provide service and to help prepare the organization for the future.

Historical records and documents are currently scattered throughout our company; some in operating areas, Public Relations/Corporate Communications, Legal, the Office of the President, etc. Although documents **can** be kept in various physical locations, all should be cataloged and retrievable. There is currently no one area responsible and therefore it is often impossible to know if documents are being kept, or if they are, where they are!

## **Goals**

- Preserve our company's heritage – gain an appreciation of our corporate culture, understand our accomplishments and appreciate those who contributed to making BCBSF a strong, successful company.
- Communicate our company's story as appropriate to employees, board of directors, retirees, customers and the public.
- Leverage our company's past to facilitate better decision-making for the future.
- Build a corporate archives and establish processes to catalogue and continually gather current and future company material including photographs, documents, publications and memorabilia.
- Initiate oral histories to preserve corporate memories from a generation of retirees and long-time employees.

## **Major Project Components**

- Create Official Corporate Archive/Establish Policy
- Request Memorabilia from Key Stakeholders/Capture Oral Histories
- Identify Opportunities to Use History and Archives

## **Create Official Corporate Archive/Establish Policy**

The BRIC can provide a logical system for preserving our documents, photographs and artifacts that will secure our founding principles and heritage and maintain important information about strategic decisions, key personnel and products. The BRIC has the technology platform, software and staff with the expertise necessary to supervise this project already in place.

Archiving and publishing a history is only a smaller part of an initiative that could be done on a one time basis for consumption of various publics. While it may have some public relations value it would be of limited value in moving the organization forward. A broader effort would entail creating institutional memory which would have much more depth and be more useful from a leadership and managerial point of view. This memory is not a single work product but is a continuing process that would entail greater depth from varying perspectives.

### **The BRIC will take responsibility for an official “Corporate Archives” program.**

The mission of the BCBSF Archives will be to serve as a centralized historical information research center for BCBSF. The Archives will play a vital role in maintaining the continuity of — and capitalizing on — the richness of BCBSF’s heritage and values. The Archives staff will accomplish its mission by acquiring, preserving and providing information from materials documenting the history of the Company and of its products, subsidiaries, employees and policies. The staff also will work cooperatively with other BCBSF departments housing BCBSF’s historical resources to ensure that those resources are available and accessible for research requests.

The Archives staff serves all Company employees, but key clients are Public Affairs, the Office of General Counsel and Brand Management.

Pursuit of this mission enables BCBSF employees to promote the Company and its products, define company trademarks, respond to customer needs, communicate with employees and the media regarding BCBSF’s heritage, and reinforce BCBSF’s position as a leader in managed care products and services.

BRIC staff will:

1. Collect and preserve archival materials that illustrate the growth and development of BCBSF.
2. Arrange and describe these materials according to archival principles and make them accessible unless access is restricted by legal requirements or written agreements.
3. Provide adequate and appropriate conditions for the storage, protection, and preservation of archival material.

4. Provide regular reference services to individuals interested in the activities and holdings of the Archives.

#### **Stages in Creating a Corporate Archives:**

- Develop a comprehensive archives policy.
- Acquire appropriate material, actively locating and gathering records from the organization.
- Catalog, index, digitize. This includes creating a rational organizational scheme for storing the records that will facilitate retrieval in the future. Create a database using the BRIC's "Inmagic" software that can be made available via the Corporate Intranet. (See description in Appendix 2.)
- Store physical documents. This includes placing the acid free boxes in a secure, climate-controlled location. All boxes and folders are labeled for easy identification.

#### **Resources Required in 2000**

The program can be started this year with approval for a 20 hour/week contract employee. If we make a commitment to a permanent, ongoing archives program this will need to be an ongoing position.

Other costs will be minimal since the BRIC already has the software necessary to build the database and available space, shelving and PCs required to begin the project.

### **Request Memorabilia from Key Stakeholders/Capture Oral Histories**

Several market and societal forces are driving Blue Cross and Blue Shield of Florida to move at an ever-increasing faster pace to succeed and maintain our leadership position. As we operate in this fast-paced technological age, we believe it is critical that we preserve our past history.

One way to preserve our past is to request memorabilia from key stakeholders, like retired board members, officers and employees; and current employees with many years of service. Another way is to capture the oral and written histories of these key stakeholders in order to permanently preserve their memories and experiences.

### **Identify Opportunities to Use History and Archives**

Once the memorabilia is gathered, an archive formed and histories collected, how will Blue Cross and Blue Shield of Florida use this material and information? Identification of opportunities to use the history and archives will be the responsibility of the work group. Keeping in mind the goals of the project and our company values, there are numerous ways to make good use of the material. Ideas such as videos, history books, newsletter articles, multimedia presentations and advertisements have been discussed. The company's 60<sup>th</sup> anniversary will be in 2004; this work will certainly be used for that celebration.

## Action Plan

<b>Action Step</b>	<b>Responsibility</b>	<b>Timing</b>	<b>Status</b>
Weekly meetings to check progress and report results	History/Archives Workgroup	Wednesday afternoons	First meeting 5/10
Develop project plan	PR/CC	End of May	Draft in progress
Benchmark other companies and research potential historians as consultants	BRIC PR/CC	May - June	In progress
Develop letter to retired officers/ board members asking for memorabilia	Jan Rogers	Mid-May	Letter drafted
Draft Corporate Archives Policy	HR BRIC	End of May	
Develop budget for project	BRIC PR/CC HR	June	