

Project Plan – BCBSF History and Archive Project

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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. The Business Research Information Center (BRIC) proposes to take the lead with a 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.

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.

Since 1981, the BRIC has collected, indexed, preserved and housed a variety of corporate historical documents including a collection of company newsletters from the 1950s to the present; various departmental research reports; speeches; news articles; other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, we took responsibility for a large corporate photo collection.

Although we 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 us as the “unofficial” BCBSF archives, our ability to capture the historical record of the company is limited by the small size of our staff and the lack of a corporate policy designating the BRIC as the official archives. We are therefore 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, 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

Identify Opportunities to Use History and Archives

Action Plan

Action Step	Responsibility	Timing	Status

Appendix 1

Sample of Companies With Corporate Archives (details follow)

Sample Descriptions of Archives Department Responsibilities:

Description: Historical, legal and administrative records of the company, its subsidiaries, founders and chief executive officers. Besides paper documents, the collection includes photographs, slides, microfiche, blueprints, videotapes, oral histories and artifacts.

Insurance Industry

Aetna
Blue Cross and Blue Shield Association
Cigna
Colonial Life & Accident
Crum & Forster
CUNA Mutual
Empire Blue Cross
Equitable Life
Farmers' Mutual Hail Insurance Company of Iowa
Fireman's Fund Insurance Company Archives
Golden Rule Insurance Company
Guardian Life Insurance Company of America
Inova Health System Archives*
Metropolitan Life Insurance Company
Mutual Assurance Company
New England Life Insurance Company (New England Financial)
Phoenix Home Life Insurance Company Archives*
Prudential Insurance Company of America
Reliastar
The St. Paul Companies
State Farm Insurance Company
UNUM Corporation Archives*

Other Companies

American Express
Arthur Andersen
Blockbuster
Deloitte & Touche
The J. Walter Thompson Co. Archives

Aetna, Inc.

Archives, RWAB 151 Farmington Ave. Hartford, CT 06156
Contact: Dennis Barrow Telephone: 860-273-0774 Fax: 860-273-8419 E-Mail: BarrowD@Aetna.com
Type of Business: Insurance and financial services Hours of Service: M-F 8:00am - 4:00pm
Conditions of Access: Open to qualified researchers; some restrictions apply Holdings: 1850 - present;
bulk dates, 1870-1965, 1980 - present Total Volume: 1,250 linear feet

Description: The strength of this predominately Aetna-specific collection is its corporate communications materials (advertising, 1900-; photographs, 1870s-; safety educational films and video tapes, 1930s-; company publications, 1868-; public policy research papers, 1978-; press releases, 1960s). Also of note: Agent correspondence, 1850s-1900; rate manuals, 1870-1970; circular letters, 1870s-; annual reports, 1851-; employee documentation, 1870s-; international insurance operations records, 1966-; corporate education materials, 1984-; marketing materials, 1900-1980s; corporate social responsibility documentation, 1959-; home office architectural drawings (James Gamble Rogers), 1920s.

American Express Company*

American Express Tower 5th Floor, World Financial Center New York, NY 10285
Contact: Mary Hedge, Corporate Historian/Records Manager; Ira Galtman, Assistant Archivist Telephone: 212-640-5698 (Hedge); 212-640-6054 (Galtman) Fax: 212-619-9804 E-Mail: MHedge189@aol.com
Type of Business: Travel, Travel-Related Services, Banking and Financial Services Hours of Service: 9:00am - 5:00pm Conditions of Access: By appointment only Holdings: 1850-present Total Volume: 1,100 sq feet

Description: Holdings consist of papers of founding partners and CEOs, articles of association, board and executive committee minutes, financial records, company newsletters and publications, express business periodicals, annual reports, product samples, advertising material, travel brochures and posters, maps, posters and artwork documenting American Express-sponsored cultural programs, and 25,000 photographs of American Express travel offices, events, and employees.

Andersen Worldwide Archives*

1405 North Fifth Avenue Saint Charles, IL 60174 Contact: Kaye Siblik, Director, Client and Office Relations; Debbie Waller, Director, Archival Services, The History Factory, 14140 Parke Long Court, Chantilly, VA 20151-1649 Telephone: 703-631-0500 Fax: 703-631-1124 E-Mail: historyfact.com Type of Business: Global Professional Services Organization Hours of Service: 9:00am - 5:30pm Holdings: ca. 1913-1996 Total Volume: 150 linear feet

Description: Holdings consist of annual reports, reference binders, photographs, executive correspondence and oral histories, firm publications, technical and policy manuals as well as Andersen family memorabilia and correspondence.

Blockbuster Entertainment

One Blockbuster Plaza Ft. Lauderdale, FL 33301-1860 Contact: Carolyn S. Denton, C.A., Corporate Archivist Telephone: 305-832-4741 Fax: 305-832-4143 E-Mail: carolyn.denton@blockbuster.sprint.com Type of Business: Entertainment, Leisure Hours of Service: 8:30am-5:30pm Conditions of Access: In-house access only. Holdings: 1982-present Total Volume: 200 cu. ft

Description: The archival collection documents the business activities and history of the company with some materials relating to its zone offices and international operations. Records consist of correspondence, speeches, clippings, oral histories, marketing materials, annual reports, publications, videotapes and memorabilia.

Blue Cross and Blue Shield Association

676 St. Clair Chicago, IL 60611 Contact: Mary Weinberg, Records Coordinator
Telephone: 312-440-5511 Type of Business: Trade Association Hours of Service: M-F 8:30am-4:30pm
Holdings: 1929-present; bulk dates 1940s-1979s Total Volume: 778 linear feet

Description: Holdings include documents, biographical materials, pictures, letters, directories, slides and publications relating to the early history of the Blue Cross and Blue Shield organization. Includes some material on the beginnings of pre-paid health insurance.

CIGNA Corporation

CIGNA Corporation was formed on March 31, 1982, by combining Connecticut General Corporation, Bloomfield, CT, and INA Corporation, Philadelphia, PA. The corporate headquarters is located in Philadelphia with business groups headquartered in both Philadelphia and Bloomfield. The CIGNA Archives maintains repositories in both locations to support the corporate departments and lines of business in each location.

Philadelphia CIGNA Corporation T205D; 1601 Chestnut P. O. Box 7716
Philadelphia, PA 19192-2057 Contact: Leslie Simon Telephone: 215-761-4903
Fax: 215-761-5588 E-Mail: leslie.simon@cigna.com Type of Business: Insurance and
financial services Hours of Service: M-F 9:00am-4:00pm Conditions of Access: Historical records open
to the qualified public by appointment. Holdings: 1792-present; bulk dates, mid 19th - 20th centuries
Total Volume: Approximately 4,000 cubic feet

Description: The Philadelphia repository maintains the records of the Insurance Company of North American and INA Corporation (1792-1982), the Aetna Insurance Company (1819-1982), and AFIA WorldWide (1918-1984) and collects the records of CIGNA Corporation and its international, group accident/disability, and rehabilitation divisions (1982-present). Holdings include 18th-, 19th-, and 20th-century corporate records as well as two centuries of correspondence, financial records, policy registers, loss and salvage records, executive papers, marketing and advertising records, specimen policy files, manuals, training materials, company publications, announcements to employees, photographs, microfilm, videotapes, memorabilia and oral histories.

Bloomfield, CT CIGNA Corporation Archives, L9 Hartford, CT 06152
Contact: Aimee Felker Telephone: 860-726-3844 Fax: 860-726-2915 E-Mail:
aimee.felker@cigna.com Type of Business: Insurance and financial services Hours of Service: 9:00
a.m. - 4:00 p.m. Conditions of Access: Historical records open to the qualified public by appointment.
Holdings: 1819-present; bulk dates, 1865-1982 Total Volume: Approximately 1,200 cubic ft

Description: The Bloomfield repository maintains the records of the Connecticut General Life Insurance Company and Connecticut General Corporation (1865-1982), EQUICOR (1986-1990), and Health Source. It collects the records of these CIGNA divisions: HealthCare, Retirement and Investment Services, Investment Management, and Reinsurance. Holdings include 19th- and 20th-century corporate records, financial records, policy registers, executive papers, photographs, advertising and marketing records, specimen policy files, product manuals, company publications, videotapes, memorabilia and oral histories.

Colonial Life and Accident Insurance Company

1200 Colonial Life Boulevard Columbia, SC 29202 Contact: Jeanette Bergeron,
Archivist Telephone: 803-798-1000 or 803-798-8398 Type of Business: Insurance and insurance-
related services Hours of Service: M-F 9:00am-5:00pm Conditions of Access: Restricted. Access
requires written approval Holdings: 1937-present Total Volume: 2,000+ cubic feet

Description: Historical, legal and administrative records of the company, its subsidiaries, founders and chief executive officers. Besides paper documents, the collection includes photographs, slides, microfiche, blueprints, videotapes and artifacts

Crum & Forster Insurance Archives* 305 Madison Avenue Morristown, NJ 07960
Contact: Joan Bianco, Director, Communications Department; Debbie Waller, Director,
Archival Services, The History Factory, 14140 Parke Long Court, Chantilly, VA 20151-1649 Telephone:
703-631-0500 Fax: 703-631-1124 E-Mail: historyfact.com Type of Business: Commercial Insurance
Hours of Service: 9:00am - 5:30pm Conditions of Access: Restricted. Outside requests for information
subject to approval by Crum & Forster Communications Department and The History Factory
Holdings: 1925-1993 Total Volume: 117 linear feet

Description: Holdings consist of advertising, legal files, company histories,
clippings, photographs, financial ledgers and memorabilia of Crum & Forster executives and older
companies comprising the Crum & Forster insurance group including North River Insurance Company and
U.S. Fire.

CUNA Mutual Group

5910 Mineral Point Road P.O. Box 391 Madison, WI 53701-0391
Contact: Erin Foley Telephone: 608-231-8580 Fax: 608-231-7875 Type of Business:
Insurance Hours of Service: 8:00am-5:00pm Conditions of Access: Restricted to company employees.
Any outside requests must be approved by Martha Ann Robbins, head of the Corporate Information Center.
Holdings: 1935-present Total Volume: 800 cubic feet

Description: Papers of the CUNA Mutual Group and its affiliates, from the time of its founding in
1935 to the present. Holdings include papers, photographs, videos, films, and objects.

Deloitte & Touche, LLP Historical Collection*

Ten Westport Road Wilton, CT 06897
Contact: Ellen Hegarty, Marketing ; Debbie Waller, Director, Archival Services, The History Factory, 14140
Parke Long Court, Chantilly, VA 20151-1649 Telephone: 703-631-0500 Fax: 703-631-1124 E-Mail:
historyfact.com Type of Business: Accounting and management consulting Hours of Service:
9:00am - 5:30pm Conditions of Access: Restricted. Outside requests for information subject to approval
by Deloitte & Touche Corporate Communications and The History Factory. Holdings: 1890s - 1980s
Total Volume: 6 linear feet

Description: Holdings consist of executive photographs, biographical material and
correspondence; publications, stock certificates, speeches and historical clippings of D&T predecessor
companies.

Empire Blue Cross and Blue Shield

622 Third Avenue, 24th Floor New York, NY 10017
Contact: Beverly Robertson, Administrator, Corporate Archives and Library
Telephone: 212-476-6260 Fax: 212-476-7629 Type of Business: Insurance and insurance-related
services Hours of Service: M-F 9:00am-5:00pm; by appointment only Conditions of Access: Written
application to corporate archivist stating nature of research project; access conditional upon approval.
Holdings: 1934-present Total Volume: 1,500 linear feet

Description: Annual reports, minutes, house organs, contracts, advertising, slides, videotapes,
reports and studies, photographs, pamphlets, monographs, financial reports and memorabilia, etc.

Equitable Life Assurance Society of the U.S.

Archives 1290 Avenue of the Americas New York, NY 10104
Contact: Jonathan Coss Telephone: 212-314-3133 Fax: 212-707-7783 E-Mail:
Jonathan.Coss@Equitable.com Type of Business: Insurance and financial services Hours of Service:
M-F 9:00am-5:00pm Conditions of Access: Open upon presentation of credentials. Holdings: 1859-
present; bulk dates, 1912-present Total Volume: 2,000 linear feet

Description: Records of the Equitable, its subsidiaries and affiliates, related insurance and financial services in domestic and international operations. Included are company histories, executive files, reports, biographical and speech files, annual reports, insurance policies, advertisements, company publications, photographs, tape recordings and memorabilia.

Farmers' Mutual Hail Insurance Company of Iowa

2323 Grand Avenue Des Moines, IA 50312
Contact: Barbara Rutledge Raife, Archivist Telephone: 515-282-9104 Fax: 515-282-1220
Type of Business: Insurance and insurance-related services Hours of Service: M-F 9:00-4:30
Conditions of Access: By appointment and consent of archivist. Holdings: 1893-present

Description: Company records publications, advertising, memorabilia, photographs. Also founding family papers, diaries, photographs, memorabilia.

Fireman's Fund Insurance Company Archives*

777 San Marin Drive Novato, CA 94998
Contact: Contact: Jim Welter, Director, Internal Communications; Debbie Waller, Services,
The History Factory, 14140 Parke Long Court, Chantilly, VA 20151-1649 Telephone:
703-631-0500 Fax: 703-631-1124 E-Mail: historyfact.com Type of Business: Property and
casualty insurance Hours of Service: 9:00am - 5:30pm Conditions of Access: Restricted.
Outside requests for information subject to approval by Fireman's Fund Internal Communications
and The History Factory. Holdings: 1800 - present Total Volume: 486 linear feet

Description: Holdings consist of administrative records; biographical material, correspondence and speeches of founders and executives; property files; logbooks and code books; anniversary material; written and pictorial documentation of the 1906 earthquake and fire in San Francisco; a large photograph collection of natural disasters and fires; and photographs providing insights to the developments of the shipping industry in the second half of the nineteenth century. Records of subsidiaries and acquired institutions, particularly the American Insurance Company and Home Mutual are well represented.

Golden Rule Insurance Company

7440 Woodland Drive Indianapolis, IN 46278-1719
Contact: Carolyn M. Sowinski, Corporate Archivist; Krista Bond Telephone: 317-297-4123
Type of Business: Insurance and insurance-related services Hours of Service: M-F 8:00am-5:00pm
Conditions of Access: Except as prohibited by general corporate policy, materials are available to outside
researchers. Holdings: 1894-present; bulk dates, 1940-present Total Volume: 1,000 linear feet

Description: Materials pertain to the Golden Rule Insurance Company, preceding companies, and the Michael Andrew Rooney family, who founded the company in Lawrenceville, IL. Holdings include photographs, product brochures, office files of executives, annual statements, corporate documents, in-house publications, an oral history project and manuscript materials of the company's founders.

Guardian Life Insurance Company of America

201 Park Avenue South New York, NY 10003

Contact: Karen L. Dickinson, Assistant Corporate Secretary Telephone: 212-598-7499
Fax: 212-420- Type of Business: Insurance and insurance-related services Hours of Service: By
appointment only. Conditions of Access: External use is limited; requests for access must be submitted
in writing. Researchers are advised to consult: Anita Rapone, The Guardian Life Insurance Company,
1860-1920: A History of a German-American Enterprise (New York, 1987). Holdings: 1860-present
Total Volume: 110 cubic feet

Description: The collection documents business activities primarily of the company's home
office, with some materials relating to its field offices, industrial branch and European business. The records
consist of minutes, annual reports, legal documents, financial ledgers, stock certificates, insurance policies
and registers, correspondence, publications, photographs and artifacts.

Inova Health System Archives*

2832 Juniper Street, Fairfax, VA 22031

Contact: Mary Stuart Rizk, Director, Marketing Communications; Debbie Waller, Director,
Archival Services, The History Factory, 14140 Parke Long Court, Chantilly, VA 20151-1649
Telephone: 703-631-0500 Fax: 703-631-1124 E-Mail: historyfact.com Type of Business: Health care
provider Hours of Service: 9:00am - 5:30pm Conditions of Access: Restricted. Outside requests for
information subject to approval by marketing communications and The History Factory.
Holdings: 1950s-present Total Volume: 81 linear feet

Description: Holdings consist of records of the Inova Health System (1987-present) and its
predecessor, Fairfax Hospital Association (1956-1987). Executive papers, HR files and newsletters, annual
and accreditation reports, and public relations material is retained. Records of constituent hospitals and
non-hospital operating units are retained, as well.

Metropolitan Life Insurance Company

1 Madison Ave. 1M-F New York, NY 10010

Contact: Daniel B. May, Company Archivist Telephone: 212-578-8818 Fax: 212-689-0926
Type of Business: Insurance and insurance-related services Hours of Service: M-F 8:45am-4:30pm
Conditions of Access: Open to all researchers with legitimate questions about MetLife. Holdings: 1868-
present; bulk dates, 1890-present Total Volume: 1,000 linear feet

Description: Materials document the development of Metropolitan Life Insurance Company.
Areas of special interest: Photographs of buildings, activities and personnel, company sponsored public
health education publications, advertising and promotional material, internal publications, papers of selected
executives, and general subject files.

Mutual Assurance Company

The Green Tree Group 240 South Fourth Street Philadelphia, PA 19106

Contact: Carol Wojtowicz Smith, Curator/Archivist Telephone: 215-925-0609 Fax: 215-
925-5473 Type of Business: Insurance and insurance-related services Hours of Service: M-F
8:30am-5:00pm, by appointment only Conditions of Access: Open to serious researchers Holdings:
1784-present Total Volume: 300 linear feet

Description: Legal, administrative, financial and underwriting records of the Mutual Assurance
Company from its beginning to the present. Of particular interest to outside researchers are the surveys of
insured properties.

New England Life Insurance Company (New England Financial)

501 Boylston Street Boston, MA 02117

Contact: Phyllis E. Steele, Archivist Telephone: 617-578-4312 Fax: 617-578-5523 E-Mail: psteele@NEFN.com Type of Business: Insurance and investment services Hours of Service: M-Th 9:15 a.m.-5:15 p.m. Conditions of Access: Company associates: Open in accordance with corporate policy on the confidentiality of information. General public: Written application to archivist stating nature of research project; access conditional upon approval by the archivist and the vice president of public relations. Holdings: 1843-present; bulk dates, 1843-1999 Total Volume: 1,800 linear feet

Description: Records of the New England Life Insurance Company, and its predecessor company, New England Mutual Life Insurance Company. Records include: Annual reports and annual statements; Board of Directors' minutes and files; correspondence and administrative files of company officers; marketing and advertising files; product information files; personnel directories; company publications (books, pamphlets, magazines, newsletters, manuals); research and planning reports; 19th century insurance applications, policies, policy registers, and policy ledgers from 1843-1890; 19th and early 20th century policy dividend, loan and valuation records; 19th and early 20th century financial records, including ledgers of accounts, cash books, and stock and bond registers; files about company agencies; departmental and subsidiary information files; scrapbooks; photographs and other audio-visual media; and company artifacts.

Phoenix Home Life Insurance Company Archives*

1 American Row Hartford, CT 06103

Contact: Michele Farley, Vice President, Corporate Communications; Debbie Waller, Director, Archival Services, The History Factory Telephone: 703-631-0500 Fax: 703-631-1124 E-Mail: historyfact.com Type of Business: Life and group insurance and investment Hours of Service: 9:00am - 5:30pm Conditions of Access: Restricted. Outside requests for information subject to approval by the communications dept. and The History Factory. Holdings: 1850s - present Total Volume: 288 linear feet

Description: Holdings represent the operation of two distinct companies, Phoenix Mutual Life Insurance Company and Home Life Insurance Company, as well as their combined efforts since their 1992 merger. Financial records and ledgers; field agent material and newsletters; correspondence and BOD minutes; policies and clippings; advertisement and photographs; as well as videos and slides are retained.

Prudential Insurance Company of America

Prudential Plaza Newark, NJ 07101

Contact: Jon W. Goldberg, Assistant Public Relations Consultant Telephone: 201-877-8533 Type of Business: Insurance and insurance-related services Conditions of Access: While the archives is no longer open to the public, specific research inquiries may be addressed to the above address Holdings: 1875-present

Description: Collection contains archival records dating from Prudential's founding in 1875 to the present day.

Reliastar

20 Washington Avenue South, Route #0110 Minneapolis, MN 55440

Contact: Scott Marsalis, Corporate Librarian Telephone: 612-342-7429 Fax: 612-342-7531 Type of Business: Insurance and insurance-related services Hours of Service: M-F 7:30am-4:30pm Conditions of Access: Restricted to employees Holdings: 1885-present; bulk dates, 1940s-1970s

Description: Contains information on executives, board members, home office buildings, advertising, products, employee benefits and handbooks, internal publications subsidiaries and reorganizations.

The St. Paul Companies

385 Washington Street St. Paul, MN 55102

Contact: Richard W. Arpi, Archivist Telephone: 612-221-7640 Type of Business: Insurance and financial products Hours of Service: Tues. and Thurs. 2:00pm-7:30pm, or by appointment. Conditions of Access: Restricted to employees/retirees of The St. Paul Companies or subsidiaries. Outside requests for information subject to approval of corporate communications department. Holdings: 1853-present Total Volume: 480 cubic feet

Description: Annual reports, financial records, company newspapers (St. Paul News and St. Paul Letter) and other publications, photographs, board minutes (1853-1968), biographical files on employees and board members (past and present), insurance policies (samples 1860s-1900 bulk), insurance signs, firemarks, artifacts relating to St. Paul Fire & Marine Insurance Company, Mercury Insurance Company, St. Paul Mercury Indemnity Insurance Company, Western Life Insurance Company (1950s-1960s), and other predecessor and subsidiary companies of the St. Paul Companies (1968-present).

State Farm Insurance Company

One State Farm Plaza Bloomington, IL 61701

Contact: Dan Barringer, Company History Unit Telephone: 309-766-6007 Fax: 309-766-6169 Type of Business: Insurance and insurance-related services Hours of Service: M-F 8:00am-4:15pm Conditions of Access: Outside requests are subject to approval Holdings: 1922-present

Description: Responsible for historical records, photographs, artifacts, and advertising material.

UNUM Corporation Archives*

2211 Congress Street Portland, ME 04101

Contact: Robert Libbey, Second Vice President, Strategic Communications; Debbie Waller, Director, Archival Services, The History Factory, 14140 Parke Long Court, Chantilly, VA 20151-1649 Telephone: 703-631-0500 Fax: 703-631-1124 E-Mail: historyfact.com

Type of Business: Specialty insurance holding company, provider of group long-term disability insurance, employee benefits, disability insurance and retirement income products.

Hours of Service: 9:00am - 5:30pm Conditions of Access: Restricted. Outside requests for information subject to approval by UNUM Corporate Communications and The History Factory. Holdings: ca. 1849-1996 Total Volume: 288 linear feet

Description: Holdings are comprised of records of the corporate office including annual reports, employee publications, sales and marketing material, strategic planning documents and more than 3,000 photographs.

Appendix 2

Electronic Archives

A database can transform records into an active resource for our employees. A database is a flexible, inexpensive, user friendly medium for storing information and making it instantly accessible to employees.

We can create an electronic database tailored to our company's needs. Photographs and key documents can provide a central source of information helping to unify our workforce. A database can bridge disciplinary, departmental, and physical boundaries to create a shared identity.

How does an electronic archival database work?

We begin by entering the basic structure of the archives. Then we scan in important documents and link keywords to the essential and most valuable documents. Monthly updates can be integrated into the existing database. When you need to find a specific piece of information simply type a keyword into your PC and the database keyword search will help you find the text or images you desire.

BRIC staff will use the following ITAC approved tools to build and maintain the database:

DBTextWorks	Creates Database
DBWeb	Enables database access via our Corporate Intranet
Adobe Photoshop	Scanning Photos
Adobe Writer	Scanning Original documents