

BCBSF History and Archives Project Proposal

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Background

Several market and societal forces are driving Blue Cross and Blue Shield of Florida to move at an ever-increasing pace to maintain our leadership position. As we continue to keep pace with technological advances, it is imperative that we make efforts now to preserve the company's rich history.

The BCBSF History and Archives Work Group is examining ways to capture and record the company's history and create an archives process and policy to guide the organization going forward. The proposed initiative will involve gathering memorabilia, files, proposals and reports; interviewing former executives and board members; and cataloging a significant amount of written and photographic material in a corporate archive. While more work needs to be completed before a definitive work plan is produced, this proposal details the groups' broad-based goals, approach and budget estimate to complete the project. The project team will develop a comprehensive work plan pending approval to proceed with and fund this initiative.

Goals

The goals of the history and archives project are to:

- 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, the board of directors, retirees, customers, the public and the media;
- Create a corporate archives and establish processes to catalog and continually gather current and future company material including photographs, documents, publications and memorabilia;
- Gather oral histories to preserve corporate memories from a generation of retirees and long-service employees; and
- Use the Corporate Archives to leverage and reinforce the strength of BCBSF's brand.

Approach

The BCBSF History and Archives Work Group proposes a three-tiered approach to preserving our corporate history.

1. Establish a permanent BCBSF archive, as well as a policy and process for maintaining the archive.
2. Capture verbal histories from current and former executives, board members and employees.

3. Determine the most appropriate ways to display archives and share the corporate history with employees, Board members, customers and the media.

Overview of Project Components

1. Create a Corporate Archive

The BRIC (Business Research Information Center) will take responsibility for establishing an official “Corporate Archives” program. The archives will serve as a centralized historical information research center and play a vital role in maintaining the continuity of — and capitalizing on — the richness of BCBSF’s heritage and values. The Archives staff will acquire, preserve and provide information from materials documenting the history of the company, its subsidiaries, employees, products, and policies. A major part of this effort will involve asking current and former board members, officers and employees to donate memorabilia they may have saved from their tenure with BCBSF.

During the archive creation phase, BRIC staff will:

- Develop a comprehensive archives policy to establish and maintain the archive. (Note: work on the draft policies and procedures is already underway.)
- Collect and preserve archival materials that illustrate the growth and development of BCBSF. (Note: A letter has already been sent to former board members asking them to donate or lend us BCBSF memorabilia as part of the project. Human Resources will send a similar letter to retired executives.) The BRIC staff will assist in actively locating and gathering records throughout the organization.
- Catalog, index, digitize. This includes creating a rational organizational scheme for storing the records that will facilitate retrieval in the future. A database will be created using the BRIC’s “Inmagic” software. Ideally, this database will be made available via the corporate Intranet.
- Provide adequate and appropriate conditions for the storage, protection, and preservation of archival material. This includes packaging materials in acid free boxes and storing them in a secure, climate-controlled location. All boxes and folders will be labeled for easy identification.
- Provide regular reference services to individuals interested in the activities and holdings of the Archives.

Resources Required

BRIC has already identified outside consultants who can assist in setting up the corporate archive. BRIC could work with this contractor approximately 20 hours per week during the initial start-up, archive design and cataloging phases. Other costs to set up the archive will be minimal. BRIC already has the software necessary to build the database and available space, shelving and PCs required to begin the project.

BRIC anticipates it will take one to two years to establish a corporate archive. Anticipated costs for 2000, presuming a part-time archivist and other costs detailed later in this document will be \$45,500. Maintaining and expanding the corporate archive will be an ongoing process that will require additional resources each year. Projected costs for 2001 will range from \$69,000 to \$84,000 depending on whether a part- or full-time employee (BRIC's preference) is hired to maintain the archive.

2. Capture Oral Histories

According to an old African saying, "When an elder dies, it is as if an entire library burns down." The same could be said for preserving a corporate history. Presently, a large part of BCBSF's corporate heritage is preserved in the memories of former board members, executives and long-service employees. These memories are a perishable commodity; elements of which are lost every day. BCBSF can safeguard against losing more of its rich heritage by capturing its history through oral interviews with people who helped shape the company.

Now is the time to begin capturing these memories. Accordingly, the History Work Group is currently identifying consultants/historians who can help us. While a historian can research and document the company's evolution from start-up to its current position as an industry leader, the most valuable work will come from interviews with former executives, board members and employees. The historian, working with a member of the public relations and corporate communications staff, will conduct one-on-one and/or small group interviews over a six- to nine-month period to capture memories, anecdotes and stories about BCBSF's past. Interview schedules, discussion guides and other logistics will be developed as part of the History Project Work Plan.

Resources Required

It will take two years for an outside historian to research and write a corporate history, which would incorporate interviews with retirees and long-service employees. The projected cost for these services is \$4,000 per month, or \$48,000 each year. This estimate does not include out-of-pocket expenses for travel, videotaping, transcription and production of a finished yearbook, videotape or other alternatives to "package" the corporate history.

3. Identify Opportunities to Use History and Archives

Once the memorabilia is gathered, an archive formed and histories collected, the work group will work with senior leadership to determine how BCBSF will use and preserve this material and information. Keeping in mind the project's goals and BCBSF's corporate values, there are numerous ways to effectively use the material. Ideas such as videos, a corporate yearbook, multimedia presentations and a permanent "Wall of Fame" display have been discussed. The History Work Group will tie together different approaches – for example, a

“Wall of Fame” in the lobby, corporate yearbook and video – to celebrate the company’s history and successes with internal and external audiences. The project will certainly be used to celebrate the company’s 60th anniversary in 2004.

Producing a written history, corporate video, “Wall of Fame” or other project display alternatives will be budgeted in greater detail as part of the final work plan.

Efforts should be made to maintain an institutional history that would have more value from a leadership and managerial point of view. For this reason, the History Project should not be viewed as a single work product but a continuing process that will require a continuous commitment from senior leadership.

Total Cost Estimate and Timing

Phase 1: Create/Maintain a Corporate Archives

Activity	Item	Cost 2000	Cost 2001
Establish Archives	<ul style="list-style-type: none"> Archivist to consult with BRIC staff -- 3 days per week 	\$2,000	\$1,500
	<ul style="list-style-type: none"> Additional License for DBText Database Software 	\$1,000	
	<ul style="list-style-type: none"> Part-time Project Manager (with benefits) Full-time position - Level 12E (with benefits) 	\$30,000	\$60,000 \$75,000
	<ul style="list-style-type: none"> Archival Supplies – binders, folders, preservation of pictures, etc. 	\$1,000	\$3,000
	<ul style="list-style-type: none"> 4-42” 5-drawer Lateral Files, Shelving 	\$2,600	\$3,000
	<ul style="list-style-type: none"> 		
Annual Retiree Dinner	<ul style="list-style-type: none"> Special Display, Activities, etc. 	\$500	\$500
Luncheons (2)	<ul style="list-style-type: none"> For BCBSF employees with 25 and 30 years of service to identify old photos and brainstorm ideas for more activities 	\$200	
Visit to local company archive	<ul style="list-style-type: none"> Three members of BRIC staff one-day trip to Walt Disney World to learn Disney handles its video and photo collections 	\$250	
TOTAL		\$45,550	\$69,000 (part-time)
			\$84,000 (full-time)

Options: This budget funds either a part-time or full-time position. Preference is for a full-time position, but BRIC is prepared to proceed slowly with a half-time position.

Phase 2: Capture Oral History

Activity	Item	Cost
Consultant/ Historian	<ul style="list-style-type: none"> • Conduct interviews with 60 people • Research and write history • Approximate cost of \$4000 per month for 24 months 	\$48,000
Transcription	<ul style="list-style-type: none"> • Transcribe interviews with all respondents, assuming 5 pages per conversation at \$3.00 per page. 	\$9,000
Travel	<ul style="list-style-type: none"> • Mileage and airfare to reach interviewees 	\$5,000
TOTAL		\$62,000

The total projected range to capture BCBSF's history and establish a corporate archive (Phases 1 and 2) is \$107,500 to \$146,000.

Phase 3: Identify Opportunities to Use History and Archives

The following alternatives are currently being considered by the work group. The team will work with senior leadership to determine which of these tools will be used. Actual costs will vary based on quantity, project specifications and other variables.

Activity	Item	Cost 2001
Videotape	<ul style="list-style-type: none"> • Create a high quality 15 minute video, using as existing footage and b-roll as possible, with new voice-over, music and graphics 	\$22,500 to \$30,000
"Wall of Fame"	<ul style="list-style-type: none"> • Photo and memorabilia display for lobby, outside 101A and hallway to BRIC • Display cases of various sizes and dimensions • 100 framed photos, mixture of 8 ½ x 11 and 11x14. @ \$30 each 	\$25,000
Yearbook	<ul style="list-style-type: none"> • Soft cover book containing black and white photos and history. Approximately 100 pages. Initial run of 1000 copies. 	\$30,000

Next Steps

The BCBSF History and Archives Work Group anticipates the following steps to drive the proposed project forward.

- Gain approval from senior leadership
- Prepare detailed project plan and accountabilities.
- Engage outside consultants/resources.
- Prepare comprehensive budget.