

“Some Things We Have Learned...”: Managing Advertising Archives for Business and Non-Business Users

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Abstract: This essay reviews the experiences of Duke University's Special Collections Library in building major collections of advertising agency and trade organization archives. Duke has acquired extensive records of several still-existing agencies and organizations and has agreed contractually to service the collections for the records creators' business needs as well as to make large parts of the collections available for academic and general users. The author describes the agreements made with donors, the experiences of an out-of-house repository trying to build the collections, the management of a fee-based information service for business users, and outreach to the scholarly community. The efforts at Duke have been extremely successful, but not without pitfalls and opportunities to “learn the hard way.”

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IN THE MID-1950s, the J. Walter Thompson Company (JWT), the international advertising agency, produced a series of booklets under the title *Some things we have learned....* The booklets captured the prevailing views about “accepted advertising facts.” But, as the foreword cautioned, “The point of view expressed has been reached after years of trial and error.”¹

Similarly, learning to manage the records of existing businesses—specifically advertising agencies and organizations—at Duke University’s Special Collections Library has been a process of trial and error. We probably are less certain than JWT was four decades ago that we have arrived at near-absolute answers. But in administering the JWT agency’s archives for ten years and other advertising collections for a shorter time, we have learned lessons that may interest other repositories that preserve business records.

The advertising archives program at Duke may be unique: here, a university repository owns several major business archives collections and services them to meet *both* the urgent business needs of the records creators *and* the diverse requirements of a broader research public. This novel approach to the advertising collections at Duke intrigued University alumnus John W. Hartman, who provided generous support beginning in 1992 to create the Hartman Center for Sales, Advertising & Marketing History. Since the Center’s founding, all work related to advertising collections at Duke’s library has taken place under the Center’s aegis.

Duke University’s Special Collections Library is a relative latecomer to collecting records of existing businesses, having begun in 1987 with the J. Walter Thompson Company Archives. Although it would be pleasing to be able to say that our library went into this venture with a clear, long-range plan and precise understanding of what we were getting into, that was not entirely the case. The Library had decades of experience as a user-friendly manuscript repository holding thousands of eighteenth- to twentieth-century “traditional” manuscript collections and, suddenly, a gift agreement with JWT that promised to provide reference service to meet the urgent information needs of an international advertising agency on a fee basis.

The full implications of that agreement emerged over a period of time through our hands-on experience.² This essay will describe the experiences of learning to manage three major advertising collections: the J. Walter Thompson Company Archives (especially), the D’Arcy Masius Benton & Bowles Archives, and the Outdoor Advertising Association of America Archives. The paper also will discuss the creation of the Hartman Center as an umbrella under which this activity takes place and the value of establishing a distinct, fairly self-contained entity to facilitate growth and development—in short, “some things we have learned...”

The J. Walter Thompson Company Archives

Getting into the management of advertising archives was less a planned event than a fortuitous one. In retrospect it seems amazing, but none of our staff had heard the name

¹“The most effective way to arrange pictures in making a comparison,” *Some things we have learned....*, Number 1 (New York: J. Walter Thompson Company, 1954), JWT Archives, Special Collections Library, Duke University.

²A number of other U.S. repositories also acquire and manage records of current businesses; among them are the Minnesota Historical Society, the Hagley Museum and Library, the Cincinnati Historical Society, and the Archives Center at the Smithsonian’s National Museum of American History. As far as I know, however, all of these excellent repositories administer their business collections along more traditional lines, meeting the research needs, primarily, of students and scholars rather than those of the businesses documented.

J. Walter Thompson Company prior to the autumn of 1987, even though it was and is one of the largest and most important advertising companies in the world. The decision to acquire the JWT Archives was a watershed event for the Duke Special Collections Library and a professional turning point for several staff members.

To review the story briefly, JWT had established an in-house archives in its New York headquarters in 1979, at the peak of corporate archives activity in the United States. With excellent management support and under the strong leadership of archivist Cynthia Swank, it became a model corporate archives, actively serving the business needs of a major international advertising agency and also allowing some access to a limited number of academic users.

A period of financial and management difficulties at the agency culminated in 1987 with the takeover of the venerable New York-based J. Walter Thompson Company by the British WPP Group plc. Belt-tightening by WPP led to the decision to cease maintaining company archives on site. Fortunately, support of both the outgoing and incoming managements at JWT resulted in placing the archives at Duke University in November 1987. Alternative fates, suffered by other corporate collections at around the same time, could have included keeping the collection on site but unstaffed or warehousing the two thousand feet of records.³ What came to Duke is a remarkably comprehensive archives: not only a massive collection of advertisements, but also substantial amounts of office files, internal publications, and reports that make this collection the most thorough surviving record of any advertising agency.

The acquisition of the JWT Archives happened very quickly, over a period of several months. A Duke faculty member who knew the collection well and appreciated its immense importance assisted in the process. The library's interest in the collection received support from the library administration and also from the university's president, whose signature appeared on the proposal to the agency. There were institutional concerns about the large size of the collection and the academic credibility of the subject matter. The library was convinced from the start that the collection was worth risks on both counts. Funding was another concern. JWT made a gift of \$100,000 along with the collection. Of that sum, \$20,000 paid for shelving, and the remainder was to support a library staff member to work with the collection for two years.

The Deed of Gift transferring the collection to Duke was approved by attorneys on both sides. Several provisions of the deed are worth noting here. One had to do with access: unprocessed parts of the collections are restricted to J. Walter Thompson Company employees, and processed sections of the Archives must be at least fifteen years old before they are open to outside researchers. Only items previously released to the public (print ads, commercials, magazine articles, etc.) are exempt from the minimum fifteen-year restriction. Although any user may see all open parts of the collections, persons seeking to publish or broadcast advertisements must gain written permission of the advertiser (i.e., client company) prior to obtaining high-quality reproductions suitable for publication or broadcast. Loan of material from the JWT Archives is restricted to museums and libraries whose exhibit facilities meet professional standards or to JWT itself.

³Frederick Rose, "In Wake of Cost Cuts, Many Firms Sweep Their History Out the Door," *Wall Street Journal* (21 December 1987): B1.

The above are fairly standard provisions of a gift agreement between a business and an outside repository. The reference service provision, though, is quite different from the ordinary:

Duke University will provide reference service for the JWT Archives in a timely fashion, in line with its overall reference service policies and procedures. Photocopies, reproductions, and extensive searching service will be provided at Duke's stated prices. 'Extensive searching' is defined as any request taking more than 30 minutes. An invoice will be sent by Duke to any requester who orders reproductions or whose request takes longer than 30 minutes....JWT will assume charges (e.g. air courier, postal service) for document delivery.⁴

This generous provision for reference service opened the floodgates for our earliest learning experience with the JWT Archives. Our initial assumption had been that the \$80,000 in JWT funds to support a staff member for two years would allow the library to process much of the approximately two-thirds of the collection that came to us unprocessed, allowing us then to incorporate it into our existing reference procedures to be serviced by the reference staff. This naive idea had to be discarded very quickly. For one thing, the phone began to ring immediately. The earliest users fell into two main groups: JWT staff in New York and other offices, well-accustomed to turning to the excellent Archives when it was in the agency's New York office, continued to call on the Archives even though it was now five hundred miles away from the agency's head office. The other early users were scholars, excited to learn of the increased access to this unique material now that it was outside the corporation and available on a less restricted basis. To make a long story short, the first two years flew by, and only a small amount of archival processing was accomplished.

What did we learn? Providing reference service for JWT and other business users quickly showed us some distinctions between our accustomed academic researchers and those in the business world. We found that business inquirers most often need the answer, they need it now, and want it in "packaged" form. They are not, as a rule, much interested in where the answer came from or in the interesting twists in the process of finding it. Scholars are more likely to enjoy the chase and participate in an exchange of ideas about how to track down an elusive bit of documentation. After some experience, I began to make the slightly tongue-in-cheek generalization that business users do not care how much it costs to get an answer (as long as they can get it quickly), whereas academics do not much care how long it takes to get information (as long as they can get it cheaply). In short, a reference archivist serving such diverse customers needs to be quick at shifting modes of thinking and assisting different user groups.

Perhaps to accomplish the processing, we should have closed the collection for a specified time period when it first came to Duke. But then we would have missed the opportunity to learn immediately about user needs for the material. We could not close the collection to JWT users in any case, in accordance with the Deed of Gift's promise of providing reference service. In retrospect, closing the collection even just to outside users would not have solved the problem of getting the material processed; there was just too much of it. Besides, those first busy two years allowed development of in-depth ref-

⁴Deed of Gift, 1987, JWT Archives, Special Collections Library, Duke University.

erence/research expertise about the most important parts of the collection that never could have been gained by concentrating on processing one series of records at a time. That initial period also made it clear that there was a massive hunger for primary records of advertising, and thus helped lay the groundwork for decisions about future growth of the JWT Archives and other advertising documentation. We also became painfully aware that, although it seemed an enormous amount of funding at the time it came to us, \$100,000 was not nearly enough to sustain a vitally important, heavily used collection like the JWT Archives over an extended period of time.

The Deed of Gift made clear that its conditions were to “cover any future transfers of material by JWT to Duke.” Initially, overwhelmed by nine hundred transfiles, we did not give a great deal of thought to adding to the collection. But with the passage of time, it became clear that this provision was important for several reasons. It allowed us to build the collection without renegotiating the conditions for each acquisition.⁵ We learned that there were pockets of important historical material—large and small—still at JWT’s New York office and at other offices worldwide. Also, we came to understand that if we failed to add more recent material to the collection, it would become “stale” and of rapidly decreasing utility to the agency. Adding to the core collection kept the collection vital to current JWT staff and provided one obvious reason and means to maintain connections with the agency.

Once we understood the importance of building the collection, determining the ways to do so was another learning opportunity. Like many university repositories that mainly hold business collections of *defunct* businesses, we had little experience in building *current* business archives. Taking a cue from the process of adding to the papers of living individuals, we soon understood that one important key is personal contact. I began to visit the New York Office and then other offices of J. Walter Thompson Company. As staff and management came to know me and to appreciate the work we were doing that benefitted the agency and its clients, acquiring material became easier. I created one-page “want lists” to explain briefly that an archives of advertising is more than just a collection of finished work; important, too, are “bodies of records that show processes and the development of ideas and strategies....”⁶

I have initiated contact with a number of JWT offices worldwide. I have traveled to the New York head office several times each year and also have visited offices in Atlanta, Chicago, Detroit, San Francisco, Atlanta, Montreal, Frankfurt, and London. These visits put a “face” on the Archives—useful in any geographically dispersed organization—and allow me to survey records on site, make presentations to staff, and meet nearby retirees. JWT also regularly sends groups of managers from its U.S. and international offices to week-long meetings in Durham, with an Archives visit always on the agenda. We have seized the opportunity of these meetings—more than a dozen in the past five years—to market the Archives’ business value to over four hundred up-and-coming executives in the agency and to build links for potential collection growth. I am on mailing lists to

⁵Of course, either donor or recipient may specify particular conditions to apply to any addition, but these circumstances have been rare in the context of hundreds of new accessions over the past decade. JWT has requested extended restrictions on a few items; Duke has chosen to exercise extremely conservative judgment prior to opening any series that is only fifteen to twenty years old for maximum protection of individuals, the agency, and its clients.

⁶“Types of materials in which the archives is interested,” handout created by the author (1988, and revised periodically).

receive telephone directories, client lists, memoranda, newsletters, press clippings, and reports on a regular basis from several JWT offices. I work fairly closely with records managers at a few offices that have them. Individuals in several offices have been invaluable in providing irregularly-produced reports and documents they deem of interest to the Archives. We try to stay abreast of office moves, which so often result in wholesale destruction of older files. In two cases, office moves have resulted in substantial additions to the Archives.⁷ Duke is, indeed, just another outpost of JWT civilization—for example, the Archives' phone number at Duke is listed in several company directories. With continued effort, outreach and travel, the two thousand linear feet acquired in 1987 has grown to over thirty-six hundred linear feet of JWT records in 1997.

As with all extensive modern records, selectivity is essential. In appraisal decisions I try to blend the approaches of business and academic archives, because we are building the collection for diverse users. I pay attention to what is important administratively for the long-term record of the company. Much of the recent material of this type has stayed in the New York Office (or a warehouse) in accordance with a records management plan put in place in the 1980s. A member of the JWT legal department administers the records plan and destruction schedule. Serving as archivist for the company, I have the opportunity to review the plan and occasionally to select material from the schedules for archival preservation. As well, the warehouse holds several hundred cartons marked "Permanent," many of which ultimately should go the Archives. In the meantime, a great deal of material for which Duke currently has no space is safe and carefully accounted for.

From a collecting point of view, external archival work has its up sides and down sides. There is no question that it is more difficult to build parts of the collection from the outside. Although the Archives continues to get larger and broader in scope, it is growing in ways that are different from its in-house days. From afar it is much more difficult to be sure I am documenting the primary (New York) office as thoroughly as my on-site predecessors could. On the other hand, with a different collecting mandate and a travel budget, I can, in good conscience, make time and effort both to collect materials that remain in private hands and to visit offices outside New York and even outside the United States in quest of suitable documentation. By reaching out to other JWT offices, I cultivate opportunities. Sometimes the outreach has a small result (a specially-labeled wine bottle commemorating the fortieth anniversary of one Latin American office); other times it is massively successful (the Frankfurt Office records). A positive aspect of collection building from a base at Duke is that advertising personnel perceive a certain cachet in placing their papers at a noted university. They are fascinated and flattered by the level of academic interest in the processes of creating advertising.⁸

In 1989, two years into the relationship between JWT and Duke, we clearly were doing well. We were providing reference service to JWT offices the world over, acquiring additional collections, and getting a modest amount of processing accomplished to make more material available. A signal of the satisfactory relationship was that, as the two-year

⁷Over sixty feet of research files, print advertisements, and other materials came from the Detroit Office move out of Renaissance Center. The move of the JWT Frankfurt Office in 1995 after thirty-five years in the same location resulted in the acquisition of 346 cartons of office files, print ads, and television commercials covering about thirty years. In both cases, I visited the offices and appraised large quantities of records.

⁸"Senior Partner John Furr of JWT, Chicago, said the agency has been surprised by how many scholars have used the collection. "'To the degree that we can help foster understanding about the role and purpose of our industry, [the Hartman Center] is a benefit, including for the company itself,' he said." Elizabeth Stephenson, "Hartman Center Makes History," *Advertising Age* 66 (4 December 1995): 28.

initial funding came close to running out, JWT agreed to make a challenge grant of an additional \$100,000 if Duke could raise \$300,000 over two years. We succeeded in meeting the challenge, but several bumps lay in the road. Matching grants are notoriously difficult to achieve. This one was no exception.

The process also revealed several cultural misunderstandings that existed between the corporate and academic environments. Problem number one was a misadventure with the press. In 1990, JWT held a well-attended reception in New York to announce the gift/challenge. One purpose of the event was to attract publicity for the company's generous gift. But the business press had learned of Duke's impending receipt of archives from another advertising agency (D'Arcy Masius Benton & Bowles), and to everyone's dismay, gave the next day's headlines to this "new news" instead of to the perceived "old news" of JWT's substantial financial gift to Duke University.⁹ The unfortunate timing of the headline upset JWT, and the agency's unhappiness took a long time and much effort on Duke's part to overcome. A second difficulty with the matching grant was JWT's assumption that many Duke alumni and other friends would clamor to help meet the match. Even in our inexperience, we feared this assumption would prove incorrect, and it did. Donors give to causes to which they feel strong attachment. Very few individuals had loyalties both to Duke and to JWT (just a few alumni have worked for the agency), and after much hard work, we found that a large share of the matching funds came from retired executives of JWT, the generation whose careers were especially well-documented in the Archives. Yet another down side of the matching grant was the enormous expenditure of time by Duke personnel it required for success. On a more positive note, reaching out to a broad group of prospective supporters did generate some new friends for the Archives and resulted in acquisition of additional materials. With the funds raised, Duke created an endowment specifically for the JWT Archives, thus assuring at least a modest level of support for the collection in perpetuity. With the reestablishment of a solid working partnership between agency and university in the mid-1990s, JWT has made additional gifts in support of its Archives. It is clear though, that any outside repository must be constantly aware of the resources needed to manage a business archives and must devote time and energy to assuring sufficient support.

What are some factors that have made the ongoing relationship between Duke and the J. Walter Thompson Company successful? Surely one factor is the great research importance and the uniqueness of the collection itself. Before the JWT Archives came to Duke, scholars and students of advertising history had very limited primary sources available to study the work and culture of advertising agencies. The immense scholarly interest in JWT seems to have cemented the notion that placing the collection in a university repository was a good idea. As then-CEO Burt Manning noted in 1990, "The enthusiasm of the faculty and staff for the project made us feel that Duke would carry on the proud traditions of J. Walter Thompson for many years to come. We are delighted by both the University's continuing enthusiasm and by the high level of student interest."¹⁰

There is no question in my mind that the heritage of an archival and records management tradition that came with the JWT collection to Duke was a factor in our success.

⁹"Duke Library Gets D.M.B.&B. Collection," *New York Times* (4 October 1990). The article deals broadly with Duke's expanding advertising collections and mentions the new JWT financial support only in passing.

¹⁰"The J. Walter Thompson Company Fund Issues a Challenge," *Duke University Libraries* 4 (Fall 1990):

Recall that the agency had an excellent, growing, professionally staffed, and heavily used archives in-house for eight years at the time of the move to North Carolina in 1987. So it was no strange thing for management or staff to call on us for urgent business support, even if that call is now long distance.

The strength and unity of the Thompson corporate culture over a long period of time and around the world influenced not only the shape of the archives collection but also interest in it and support of it. A whole generation of executives now retired—and many still living, now in their sixties, seventies, and eighties—were trained in the Thompson agency's way of creating advertising and doing business. Many of them worked for the agency for two, three, or four decades from the 1950s to the 1980s. These individuals, well-educated and well-traveled, represent a group considered to be “true Thompson men.” They were major supporters of the effort to preserve the Archives after WPP Group acquired JWT. Their support has taken the form of contributions of funds and papers, willingness to participate in oral history interviews, and advocacy for the Archives with current management and with other executive retirees.

Recently JWT has appointed a new CEO (only the seventh leader in 133 years). This new Chief Executive, a man in his early forties, and his staff have pushed forward the trend to electronic communication. The CEO sends a monthly communiqué to worldwide staff by e-mail. The agency no longer publishes a company-wide newsletter. “I hate print,” one communications manager confided recently. How will this increasing reliance on electronic design and communications, along with changes in key personnel, a re-vamping of the corporate identity program, and the loss of longtime clients (e.g., losing the Eastman Kodak account in 1997 after sixty-seven years) affect the Archives? It seems safe to say that the task of building the collection may become more challenging and that the established types of usage by the agency (telephone, fax) may drop somewhat in favor of e-mail questions and website answers. The Archives staff at Duke will need to monitor such changes, reinforce ties with the agency, put a more business-friendly face on its JWT Archives website—in short, we must evaluate and upgrade the ways the Archives can meet business needs, and continue to feel our way along an ever-shifting corporate landscape. The changes certainly are not unique to J. Walter Thompson Company in the fast-paced 1990s.

D’Arcy Masius Benton & Bowles

The effect of having an archives tradition is illustrated by Duke's somewhat contrasting experience with the records of D’Arcy Masius Benton & Bowles (DMB&B), another New York-based advertising agency. The collection now at Duke consists mainly of the records of Benton & Bowles (founded in New York in 1929 and the agency that merged with D’Arcy McManus Masius in 1986 to form DMB&B). Although some material had been gathered together for a fiftieth anniversary book,¹¹ neither B&B nor D’Arcy ever created a formal archives.

Inspired by the J. Walter Thompson Company example, DMB&B Chairman Roy Bostock placed his company's surviving records at Duke in 1991. Not only had DMB&B not created an archives in-house, the chairman admitted that although he had spent his thirty-year career at the agency, he didn't think any historical materials had been pre-

¹¹Gordon Webber, *Our Kind of People* (New York: Benton & Bowles, Inc., 1979).

served.¹² A Duke alumnus, Bostock came up with a creative way to benefit both his company and his alma mater. He hired two Duke undergraduates from the New York area to work as interns at the agency in the summer of 1989. Their task was to determine whether any records of permanent importance had survived, and to prepare a report to aid in deciding how to handle any material found. The interns received a crash course in both advertising and archives at Duke early in the summer, then set to work in New York, with carte blanche to go anywhere and talk to anyone. I remained in nearly daily telephone contact with the students and paid a midsummer visit to the agency. Although an unusual way to survey historical records, the result of the students' excellent work was gratifying. Several thousand advertising proof books dating back to 1932 resided in a sub-basement. Conversations with dozens of staff members turned up quite a body of paper and photographic records worthy of preservation. Here again the story takes on a good news/bad news quality. The excitement of discovering so much material was diminished by the disappearance of some of it during a subsequent office move, before it could be transferred to Duke. Moves are chaotic; it is not certain that hovering with vigilance in the office could have prevented the losses, but working at a distance surely increased the odds that such problems would occur. The net result, nonetheless, was very positive: 154 feet of documentation spanning 1929 to the 1980s (print ads, TV commercials on film, and 21 feet of office files and printed material) all came to Duke in 1991. Because the collection arrived at Duke in unusable disarray, processing was essential before use could be possible. We requested and received from DMB&B a gift of adequate funding to complete processing of the papers and opened the collection for use in 1994.¹³

Although much smaller in size than the JWT Archives, the DMB&B material is rich and valuable to academic users. Duke staff provide occasional reference and research services to DMB&B and its clients, but the usage is much lower than JWT's. I believe the main reasons for the lower reference demand include the absence of DMB&B staff experience in tapping archives for business use and the spotty nature of many of the file series.

I do attempt to acquire additional DMB&B records as specified in the Deed of Gift. With the exception of receiving regular installments of print advertisements sent to me by the agency's Print Traffic Manager, I have had only limited success in building the DMB&B Archives.

Outdoor Advertising Association of America

In 1996, Duke acquired a third major advertising archives. This large collection had a history completely different from either of the agencies detailed above. The Outdoor

¹²“After I learned that J. Walter Thompson had made a primary gift of its archives, I discovered that we had a host of materials, which I wasn't previously even aware of, stored in the basement of a warehouse across the street from us in New York,” said DMB&B CEO Roy Bostock. “...Maybe we can supplement the Thompson Archives with our own materials, and broaden the base of materials for scholars.” *Campaign Thresholds: Newsletter of the [Duke University] Capital Campaign for the Arts & Sciences and Engineering* (March 1991): 3.

¹³The collection as it came to Duke in 1991 unexpectedly included 554 reels of film, primarily TV commercials of the 1950s to the 1970s. Because the films were unanticipated, we had not sought funds to manage them. Preliminary lists exist, but it has not been possible to do video transfer or to catalog them fully as of this writing. This example represents one of the pitfalls of collecting business records from afar: an outside repository is perhaps in a weaker position to control the receipt of material at a time when resources exist to deal with it satisfactorily.

Advertising Association of America (OAAA), a trade organization that has represented billboard advertising companies for over a century, had placed a large quantity of its records at Fairleigh Dickinson University in New Jersey in 1972. James Fraser, university librarian at Fairleigh Dickinson, built upon the collection substantially over the next two decades, amassing 150 cubic feet of the association's office files, over one hundred thousand slides and perhaps fifteen thousand photographs of billboards, related personal collections, and over one thousand books and trade magazines. The collection became well known and was regularly tapped by both business and academic users. Fraser published a book in 1991, the Association's centennial year, that probably enhanced awareness of the collection.¹⁴ With administrative changes at Fairleigh Dickinson in recent years, however, support for specialized library collections has diminished, and, in 1996, Fraser sought a new home for the OAAA Archives and all the related material, over three hundred cubic feet in all.

With support from Fraser, Duke negotiated for transfer of the collection directly with the OAAA, which had retained ownership of the archives. The Gift Agreement was modeled on the useful one created with JWT in 1987 and used again with appropriate revisions for DMB&B in 1991. We were especially attentive this time to the importance of specifying that a minimum amount of annual financial support for the archives come from the records creators.

The outdoor advertising collections have been at Duke only a short time, so our experience with them is fairly limited. Our reference service arrangement is basically the same as that for JWT and DMB&B: broad access, fee-based service, quick turnaround to meet business needs. One difference is that the OAAA office files, about one hundred cartons, are in significantly greater need of processing attention than the other collections. Lack of resources and a flood in the library at Fairleigh Dickinson contributed to the varying degrees of disarray present in many of the archives boxes. Many of the thousands of slides and the book collections are in good order; for the time being these resources are the major tools for reference and research.

The OAAA collection is already moderately well known in its industry and among certain user groups. We are proceeding with a limited program of publicity and outreach until more of the material is accessible; we answer all questions that we can using the better-organized parts of the archives. As we gain more control over more material, we plan to make substantial efforts in publicity and outreach to see that this outstanding collection is widely available to business and academic users, and to work toward its becoming more self-supporting through research fees and gifts.

The Hartman Center For Sales, Advertising & Marketing History

The first part of this essay has concentrated on Duke's experience with individual major advertising collections. To place them in context, I will briefly review the origins of the Hartman Center and the role it has played in developing the collections and programs at Duke.

By 1992, Duke's Rare Book, Manuscript, and Special Collections Library held both the J. Walter Thompson Company and D'Arcy Masius Benton & Bowles archives. My title had become Advertising History Specialist, and I had hired a part-time staff member

¹⁴James Fraser, *The American Billboard: 100 Years* (New York: H.N. Abrams in association with OAAA, 1991).

to help with increasing reference activity. With two important collections in hand, the Library had begun to think more seriously about creating a research center focused on advertising and culture. The idea was developing slowly, and we had the great good fortune at the time to attract the interest of a Duke alumnus, John W. Hartman ('44). Hartman, who has had successful careers in advertising, media, and sales, offered operating support for a research center with a somewhat broadened focus that would include the study of selling and the broad umbrella topic of marketing. The Hartman Center was born as "an ambitious effort to document as fully as possible the roles of sales, advertising, and marketing in modern society."¹⁵ In addition to collecting documentation, the Hartman Center's mission is to ensure that the material is used to enhance education at Duke and elsewhere through research access and programming.

The primary focus is on stimulating study of the target fields, but the role of serving business needs coexists peacefully with the more academic impulse. For one thing, we already had agreements in place with several agencies to continue to meet their urgent business requests. For another, we had found that fees generated by reference work for businesses contributed significantly to supporting the Center's functioning, currently contributing about 15 to 20 percent of the annual budget.

From the outset, the Hartman Center worked to create a distinct identity for itself within the Special Collections Library. The Center printed a colorful informational brochure in 1993 and began publishing a twice-yearly newsletter in 1994. In 1995, the Center put up a World Wide Web site, which includes all the newsletter issues and increasing numbers of collection finding aids. The Center now has name recognition across the United States and in many other countries. At the time of this writing, a project is under way to design a logo and create a unified look for the Center.

The Center's growth will continue, with a careful eye to space and resources, to manage incoming collections. With over forty-five hundred feet of material (three very large advertising archives, several thousand books and journals, five film and video collections, and several dozen small- to-medium-sized collections), the Hartman Center has become a major research center in its field. There is a solid record in place of managing business collections for different constituencies. That record will facilitate continuing growth, allowing the Hartman Center to play a leading role in the preservation of a still under-documented element of modern culture.

Reference Service in the Hartman Center: Meeting Multiple Needs

Almost daily, Hartman Center staff at Duke meet the business needs of the J. Walter Thompson Company's offices around the world. Hundreds of annual requests come from forty-five offices on every continent. Many of the requests from JWT staff require quick turnaround to meet business needs, and we are careful to meet deadlines. The service we provide is, in fact, virtually identical to that provided by the archives when it was in-house. In most cases, business people want to receive the information, packaged, at their desks rather than visit the archives personally to perform a search.¹⁶ Services such as

¹⁵J. Walter Thompson: *An Advertising Archive and a Place in History* (Durham, N.C.: Duke University, 1996), 21.

¹⁶Records of inquiries handled at JWT when the Archives was in-house bear this out. Question intake sheets show advertising staff at JWT most often phoned the archives for assistance even when their offices were within one or two floors of the archives' location. *Archives Inquiries 1979-1987*, JWT Archives, Special Collections Library, Duke University.

facsimile transmission, overnight couriers, and gradually, e-mail and the World Wide Web are therefore diminishing the importance of the physical location of collections.

The largest number of non-JWT users is academic: Duke students and faculty, and many, many researchers from other colleges and universities in over a dozen countries. We offer individualized reference service to these users that is parallel to that received by other Special Collections researchers at Duke. We will respond to letters, e-mail, faxed and telephone inquiries in a timely fashion. The Hartman Center's Reference Archivist handles these requests and also works closely with the many researchers who visit Duke. Members of the general public also ask a range of questions, and again receive the service Duke offers to any user. Non-JWT business users (journalists, movie studios, publishers, law firms, market researchers, etc.) also receive the research services accorded to any other paying customer.

The Hartman Center offers reference and research service according to several fee schedules. All fees are for work done by our staff; there is no charge for anyone to examine collections in our Research Room. In accordance with the current schedules, we will do ready reference up to thirty minutes for any inquirer at no charge. Sometimes the thirty-minute period includes a quick faxed answer or return phone call, also at no charge. For "extended research" the lowest hourly fees are for academic and not-for-profit users. The highest fees are for profit-making companies whose archives are not at Duke; there is a reduced fee scale for JWT and the other companies whose records we maintain. We discuss all fees in advance, determining the requester's budget limit for a given project. Providing prompt turnaround for business users is a standard operating procedure; rush requests for "drop everything" service do incur additional fees. All users pay for reproductions at cost. For-profit users pay Commercial Use Fees for publication or broadcast of Hartman Center materials; we provide reproductions for these purposes once appropriate permissions have been obtained by the requestor.

In providing this diverse reference service, there have been a number of lessons. One is that having a specialized staff to concentrate on the advertising collections has been essential to meet the needs of all categories of our users. Both the business inquirer (needing detailed answers fast) and the academic researcher (needing in-depth information, often from many sections of the collections) benefit from the detailed understanding of the collections that our Hartman Center staff have gained from intensive daily use. We ask the regular reference staff of the Special Collections Library to handle routine requests for known items (e.g., undergraduates asking for print ads in a certain product category), and we have student assistants do routine retrievals and reshelve advertising boxes, but all extensive or complex queries come to the Hartman Center.

We also have learned that it is acceptable to charge for certain categories of service. We earn a portion of the income that supports the advertising collections from hourly search fees, rush fees, and commercial use fees. Fees generated all go into the operating budget for the advertising collections.

Conclusions

Business archives today are found inside the companies that created them and also in a number of different repository settings. There has never been a single perfect answer to the question of what to do with business records, nor is there likely to be one in the future. A range of methods of managing these records to preserve their business and cultural importance now exists. Of that range of possibilities listed in the table in the

appendix, this article describes in detail only the situation at Duke University. One other model, the BP Archives now at the University of Warwick in England, also deserves brief mention. The model is intriguing in part because it does not appear to have been attempted in the United States. As a result of a corporate restructuring and cost-cutting at BP, about twelve thousand feet of records and five BP staff members took up residence in what the English call a "purpose built" annex to the University library in 1993. Interestingly, BP and Warwick proportionally shared the cost of the building, the archives and staff are still part of the corporation, and records prior to 1955 are for the most part open for all 'bona fide' researchers. So far the BP/Warwick experience is considered a success. As archivist Anita Hollier wrote in a 1994 issue of *Janus*:

The main benefits of the move have derived from the fact that costs have been reduced whilst retaining the Archive as an integral part of BP. Archivists are still able to liaise with the parent company to ensure future accessions of records, and BP has the security of knowing that confidential records are being handled by company employees who understand their significance. Openness was a central theme of the company's recent culture change, so making company archives available to the public was seen as a useful way of extracting value from them. At the same time, the fact that the Archive continues to be administered by company employees who have some understanding of business needs means that it can continue to provide a relevant service in-house.¹⁷

BP and Warwick worked out a more conservative, protective stance than the JWT/Duke arrangement, but an interesting and innovative one for companies that want to gain the public relations and cultural benefits of keeping archives but reducing the costs. Repositories would do well to examine what they can do with corporate records as the millennium approaches. We do a disservice to all future generations of scholars if we in universities and historical societies document all of society except business, avoiding company records because "they're too big" and because businesses "should" manage their own archives. We do a disservice to those businesses, too, if we fail to enter into a dialogue about the *spectrum* of possible ways to preserve and use their documentation. As Jim Fogerty has stated on many occasions, the Minnesota Historical Society does—and should—propose an in-house archives as a first option to consider when any business seeks help in managing its records.

Careful consideration of appraisal methods can help to conquer the fear of bulk. Probably a more terrifying topic to both parties is money. Expertise, space, storage, and service all have costs. And businesses *should* expect to pay, whether the solution to their archival problem is in-house or outside the corporate walls. At Duke we definitely have learned to think in terms of more digits after the dollar sign. The word "history" can cause the eyes of corporate executives to glaze over; terms like "added value" can facilitate communication. Keys to success in innovative arrangements that emerge between businesses and repositories will include boldness of vision and careful negotiation to create

¹⁷Anita Hollier, "A Place for the Archives—The BP Solution." *Janus* (1994, no. 1): 104. I would argue that many of the benefits Hollier mentions are very similar to the environment we have created at Duke: archivists here liaise with records creators, confidentiality is taken extremely seriously, our staff has gained an understanding of business needs, and costs to the record-creating companies are lower than in-house archives.

partnerships that benefit all parties. With courage, creativity, cooperation, and, of course, cash, it can be done.

At Duke in 1987, we knew we were getting something big and good when the nine hundred transfiles of JWT records arrived, but we didn't really know how big or how good—or, initially, how it would change our professional lives. I think the primary lesson we have learned is that *actively* managing the records of an existing business in a university library is not “business as usual” for an academic repository. This message is the one that must reach repositories that may want to take on records of active corporations. As with every other bold adventure, there have been stressful and unhappy moments in the learning process. But overall we have been involved in a wonderful experiment that has met with great success.

Summary of Some Things We Have Learned

Some of the primary lessons of working with advertising collections have included the following:

- Be willing to take risks.
- Be certain that any new venture fits with the institutional mission.
- Seek institutional commitment to innovative ventures at a high level.
- Negotiate.
- Communicate.
- Be willing to spend resources to gain resources.
- Devote specialist staff to managing specialized collections.
- Be prepared to charge appropriate fees for services.
- Commit to outreach and publicity, but be prepared to deal with sometimes unexpected results.
- Understand that businesses and universities/historical societies have different missions, worldviews, and cultures. Expect some misunderstandings and learn to address them.
- Learn to speak with business people in “business language” rather than archival or academic jargon.
- Learn to think about funding on a larger scale than you probably are accustomed to.
- Be flexible and willing to try new things.

In bringing together some of the results of Duke's adventures in advertising history, I realize that the lessons will sound elementary to some readers and radical to others. Duke's position in an imaginary spectrum of options for managing modern business records is a middle position between that of a fully operational in-house corporate archives, and business records as “historical collections” divorced from the everyday realities and needs of the companies that created them.¹⁸ No solution fits every circumstance. I do hope that aspects of our exciting experience will be of use to some repositories and will contribute to the ongoing discussions of preserving business history for all the reasons it should be preserved.

¹⁸See the appendix for the author's draft model of the range of ways that business archives have been handled.

Appendix: The Range of Possibilities for Dealing with Business Archives

OPTION	PRO	CON
No archives (everything is discarded when becomes inactive or is warehoused)	Presumed financial savings and legal protection	Loss as business and cultural asset; waste of time seeking info or waste of resources to store inaccessible material
"Historical files" saved	Some access, often via company's library or information center	May be very selective and subjective; sentimental rather than substantive value; staff in charge may have little or no historical knowledge/interest
In-house corporate archives	Accessible; business asset/added value; proper and efficient preservation; professionally managed	Costs money; usually limited value to scholars because inaccessible outside company; may be at risk of discontinuation at whim of management
Outsourced corporate archives (commercially managed)	Same as above	Same as above (can be very expensive)
Archives given to outside repository (one-time gift)	Cultural asset (some or all available to scholars); lower costs than above	Limited business value if non-growing collection; company likely to lose track of collection over time
Archives maintained in outside repository with continued company ownership	Professional management; ongoing relationship	Value as business asset depends on nature of contract with repository
Archives given to outside repository (ongoing relationship)—JWT model	High business and cultural value; lower costs than in-house; continued growth means continued relevance of collection to company	Requires cultivation of relationship by both parties; some loss of control by company
Archives placed in repository with company ownership retained—BP model	Same as above	More control over collection (collection managed by company staff offsite)