

Ivy Lee and the Rockefellers' Response to the 1913–1914 Colorado Coal Strike

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Ivy Lee's work on behalf of the Rockefellers and the coal mine operators in the aftermath of the bitter Colorado coal strike of 1913–1914 was a milestone in early public relations. Based primarily on original manuscripts, this historical study chronicles Lee's work as a consultant in 1914 and as a Rockefeller staff member in 1915. Lee's best-known activity was a series of controversial informational bulletins targeted at opinion leaders. He also engaged in government relations, conducted some media relations, and provided advice on how the Colorado Fuel & Iron Company could improve labor relations. The findings provide no support for claims that Lee was intentionally *deceptive*, but supports a *contradiction thesis*, which suggests a gap existed between Lee's espoused principles of publicity and his actions. This contradiction can be explained by the fact that Lee worked in less than ideal circumstances.

One of the most important episodes in the early development of public relations occurred in the aftermath of the bloody Colorado coal strike of 1913–1914. On April 20, 1914, a gun battle broke out between striking miners and the Colorado state militia at the temporary camp set up by strikers outside the mines at Ludlow. Three strikers and one militiaman were killed. However, the real tragedy was revealed when 11 women and children were found dead in one of the many earthen storage pits dug below the tent colony. The innocent victims had hidden in the pit to escape the gunfire and apparently suffocated when a smoky fire later swept through the compound. The incident sparked 10 days of widespread violence in the surrounding coal fields, resulting in at least 53 deaths.

The union also laid blame squarely on the coal mine operators, who, the union argued, could have avoided bloodshed if they had recognized the right to collective bargaining.¹ In particular, John D. Rockefeller, Jr., and his family were easy targets. The millionaire New York investment family owned about 40% of the common and preferred stock of Colorado Fuel & Iron Company (CF&I), the largest of 170 coal operators in Colorado. The public still vividly remembered JDR Jr.'s father, John D. Rockefeller, Sr., now 75, as the vilified scion of the Standard Oil Trust.²

The month following "Bloody Ludlow" saw a flurry of public activity in the aftermath of the tragedy. Senator Martin Foster of New York, at the behest of President Woodrow Wilson, pressed Rockefeller to intervene and to recognize the union. Governor Elias Ammons, along with the operators, pleaded for help with President Wilson, who on April 30 ordered federal troops into the strike zone to maintain law and order and to protect property. Federal troops remained in Colorado for the remainder of 1914.

Meanwhile, the publicity machine of the union's local, whose headquarters were in Denver, spearheaded a publicity campaign to rally support nationwide. Although a Denver newspaper probably was the first to use the term, the union's publicity director, Walter H. Fink (1914), quickly popularized the phrase "Ludlow Massacre." An "expedition" of women and children was sent to Washington to visit President Wilson at the White House. After JDR, Jr., declined to see them, the Coloradans became star attractions at a mass rally in New York. Socialist writer Upton Sinclair organized pickets outside Rockefeller's offices at 26 Broadway in New York and held a rally in suburban Tarrytown, New York, the Rockefellers' hometown.

It was against this background that public relations pioneer Ivy Ledbetter Lee was called on to apply principles of the newly emerging field of public relations, which he called "publicity." Lee, then 36, was the son of a Georgia preacher. Lee had been educated at Princeton and worked at three New York newspapers before forming a public relations agency in 1904. He later served as publicity director for

¹A highly readable introduction to the strike and related events is McGovern and Guttridge (1972), based on McGovern's 1953 doctoral dissertation. The strife is discussed from the labor perspective in a variety of books: Beshoar (1942), Gitelman (1988), Donachy (1989, 1990), Long (1989), McClurg (1959), and Papanikolas (1982). A reasonably balanced description of life in southern Colorado coal mines was written by Clyne (1999). The story of the strike and Ivy Lee's role comprises an 11-min segment in the PBS documentary *The Image Makers* (Corporation for Entertainment and Learning/BDM, 1984).

²The Rockefellers paid comparatively little attention to CF&I—it was one of hundreds of investments they owned. In fact, the Rockefellers had become involved essentially as a favor to financier George Gould, who had wanted to wrestle control of CF&I's lucrative steel-making operations in 1903 (Scamehorn, 1976, 1992). The family's involvement was limited to holding three seats on the board of directors, and the family intended to sell their shares as soon as they received a good price. Useful background on John D. Rockefeller, Jr., and the family's role in the strike is provided in biographies by Chernow (1998), Collier and Horowitz (1976), Flynn (1932), Fosdick (1956), and Nevins (1953). The most notable attack on JDR, Sr., was muckraker Ida Tarbell's series on "The History of the Standard Oil," which appeared in *McClure's* magazine from 1902 to 1904 (Tarbell, 1905/1963).

the Pennsylvania Railroad before spending 3 years in Europe in the banking industry. He returned to the railroad in 1912 as assistant to the president, responsible for publicity.

Hiebert (1966a) remains Lee's definitive biographer. Yet many of the rich details about his work for the Rockefellers in Colorado remain to be told. This study examines the depth and breadth of Lee's work for the Colorado coal operators and the Rockefellers by drawing primarily on the archived correspondence between Lee, the Rockefeller business staff, and the officials of CF&I. In so doing, this study has two purposes. One is to chronicle the depth and breadth of Lee's work during the initial 20 months he worked as a consultant and as a staff member for the Rockefellers, who became a lifelong client. The second purpose is to re-examine criticisms that have been lodged against Lee's performance, including claims he was deceptive and misled the public about the Colorado strike.

IVY LEE RETAINED AS CONSULTANT

John D. Rockefeller, Jr., was shaken by the public reviling that followed news reports about events in Colorado (Flynn, 1932; Pringle, 1926). As the controversy brewed, Rockefeller and his staff recognized the need to stem the tide of negative public opinion that was directed toward CF&I and the Rockefeller family. Although CF&I officials in Colorado and Rockefeller's staff in New York both had attempted to provide media with information, their efforts were limited and largely ineffective.

Various friends offered suggestions to Rockefeller and his staff on how to respond. Recommendations ranged from saying nothing to taking out full-page advertisements in major newspapers. JDR, Jr., sought advice from other business people as well as media executives such as editor Arthur Brisbane of the *New York Evening Journal*. Brisbane was particularly influential, and was responsible for recommending publicist Ivy Lee to the Rockefellers. Lee actually was Brisbane's top choice among four candidates he recommended. Brisbane characterized Lee as "an intelligent, thoroughly trained man—and of high character." JDR, Jr., later explained his search this way:

When this situation developed last year, finding that it was difficult to get the facts before the public, I personally took pains to inquire who could assist us in what I believe [is] an important public work. After careful inquiry I was told of Mr. Lee, and asked him if he could undertake to assist the operators' committee and ourselves in the matter of properly presenting the facts of the situation. (U.S. Commission on Industrial Relations [UCIR], 1916, vol. 8, p. 7772)

In their initial telephone conversation, Rockefeller began by asking whether Lee could suggest someone who could cooperate with his office and the coal operators

in Colorado to get the facts concerning the situation before the public. “Mr. Rockefeller explained to me his very strong feeling that the public wholly misunderstood his attitude and had misunderstood the essential attitude of the operators,” Lee later testified. In their initial meeting on June 1, 1914, Rockefeller thought a good strategy might be to reach the public through advertising. As Lee later explained, “I advised him that would be in the highest degree unwise, and that no money should be used in any way, directly or indirectly, to influence the attitude of the press on the subject” (USCIR, 1916, vol. 8, p. 7899). Lee later recalled that he told Rockefeller that the operators should “make their story available to the newspaper, say whatever they have to say over their own signatures, and take full responsibility for accuracy” (quoted in Wisehart, 1929, p. 126).

Lee’s approach contradicted Brisbane’s suggestion that public communications be distributed under the auspices of Colorado Governor Elias Ammons, but was generally consistent with the straightforward, factual approach proposed by Brisbane (1914). Rockefeller would remark, “This is the first advice I have had that does not involve deviousness of one kind or one another. The obviousness of the course you suggest *does* appeal” (Wisehart, 1929, p. 126; see also Berlin, 1946).

After Rockefeller and Lee struck an agreement in principle on June 1, Rockefeller sent Lee additional background (Rockefeller, 1914a). Lee would be a consultant, even though he worked full time as assistant to Samuel Rea, president of the Pennsylvania Railroad, and lived in Philadelphia. Rockefeller had already asked Rea whether he could talk with Lee. Rea agreed “in light of the important questions involved” (Lee, 1914a). However, the assignment would have to be completed so the work did not interfere with Lee’s regular full-time duties for the railroad, which included seeking a large freight rate increase from the Interstate Commerce Commission. Thus, ironically, what many scholars consider a seminal undertaking in early public relations was essentially a moonlighting assignment.

Rockefeller staffer Jerome Greene initially oversaw Lee’s work,³ but Lee quickly developed a close relationship with his famous client. JDR, Jr., conferred with CF&I Chairman Bowers, a long-time Rockefeller confidant who lived in Binghamton, New York, and then sent a letter to CF&I President Welborn in Denver to outline the plans. Rockefeller’s intervention was a sharp departure from the

³Greene and Lee talked to settle the particulars, which were recapped in a letter of agreement. In addition to being paid a \$1,000-a-month retainer, Lee was authorized to hire a confidential assistant and clerical assistance to secure office space in Philadelphia, and to purchase necessary office supplies. Lee received a \$2,000 advance to cover out-of-pocket expenses and was given discretion as to the terms on which staff would be engaged. The understanding was that Lee advise Greene of such arrangements and that important expenditures be approved in advance and vouchers be submitted for approval (Greene, 1914a; Rockefeller, 1914b).

pattern in most of the Rockefellers' investments, and was undertaken in his role as the largest—but not the controlling—investor in the firm. Rockefeller explained that Lee was to plan and direct a publicity campaign that would emanate from Denver, but was particularly directed to the eastern United States, “where the public is still sadly in need of accurate information regarding conditions in Colorado” (Rockefeller, 1914c).

Rockefeller described Lee as a “conservative, resourceful, a man of highest character, absolutely free from the sensationalism of many newspaper men, and his ideas as to methods of publicity are many of them to us new and in every instance commendable.” Rockefeller outlined Lee's plans, adding “it is not Mr. Lee's thought to publish controversial material, but rather to present the facts in an entirely good natured, attractive, and impressive manner” (Rockefeller, 1914c). Bowers had suggested that the other operators could probably contribute little money to the project because of the downturn in revenues brought on by the strike. Thus, Rockefeller told Welborn he would cover whatever expenses were incurred that the operators' committee could not pay (Rockefeller, 1915c).⁴

Two days later, Lee wrote Welborn to ask for background on the strike, including statistics on mines, production, employment, and the number of strikers. He explained that he wanted to get out to the press an article showing that the companies were mining all the coal the market could absorb and that there had been no ruthless destruction of life by either the mine guards or the militia. (This was a dubious claim based on past events.) He added, “As you are doubtless aware, one of the most serious ideas with which we have to contend in this whole matter is that the operators in Colorado have been killing women and children. We ought to meet that proposition quite specifically” (Lee, 1915e).

Of special note is the role of Lewis S. Bigelow, a journalist who resided in New England and happened to be Lee's brother-in-law.⁵ Upon being retained by the Rockefellers, Lee was authorized by Greene to “employ a man who will be competent to go out to Colorado with a view of preparing material for publication under your direction” (Greene, 1914a; Rockefeller 1914c). Rockefeller explained to Welborn that Bigelow's involvement initially would involve preparation of a booklet on the sociological and welfare programs that CF&I provided for its miners.

⁴The Committee of Mine Managers included Welborn as well as John C. Osgood of the Victor-American Fuel Company and David W. Brown of the Rocky Mountain Fuel Company. These three largest operators had been appointed by others in the industry to coordinate all publicity and government relations for the other coal companies at a meeting in September 1913. The three men met almost daily in one of their centrally located Denver offices to coordinate strike response activities.

⁵Lee had met the young journalist while working at the *New York Journal* and lived with him for a period in the home of their mutual friend. Bigelow had invited his sister, Cornelia, to visit New York from St. Paul during Thanksgiving 1900. Bigelow invited Lee to join them for dinner. Ivy and Cornelia were immediately attracted to one another and married the following year (Hiebert, 1966a, p. 37). Bigelow would be employed by Lee in his agency during the 1920s (Hiebert, 1966a).

Rockefeller reaffirmed Bigelow's involvement when he approved Lee's proposal (1914c, 1914d). Welborn later reported to JDR, Jr., that Bigelow arrived on June 13, had collected information at the office, and would travel to Pueblo to meet CF&I's Fuel Department manager and medical director (Welborn, 1914a). Bigelow also toured the model mining camp at Lime and possibly visited other mines as well (Gilchrist, 1915). Bigelow returned with a large array of materials (Lee, 1914f, 1915a).⁶ Lee later wrote Rockefeller that Bigelow had compiled information that went far beyond the original purpose of his task and was working up the material at home (Lee, 1914g). Lee's family relationship to Bigelow was not mentioned in writing, although Lee might have disclosed it to Rockefeller.

During the first 3 months of Lee's assignment, Rockefeller, his staff, and Lee engaged in a steady stream of correspondence in which they exchanged clippings, information, and suggestions on strategy (e.g., Greene, 1914b). Rockefeller himself was an active client who conferred with Lee several times in New York and hosted Lee several times as an overnight guest at JDR, Jr.'s West 54th Street home—a common practice of the millionaire. Rockefeller also wrote Lee at least a dozen times in June and July. In addition to routine requests for materials (Rockefeller, 1914e, 1914f) and suggestions of people to be put on Lee's mailing lists (e.g., Rockefeller, 1914g), Rockefeller routinely sent clippings (Rockefeller, 1914h, 1914i, 1914j), sought advice on how to respond to people offering help (Rockefeller, 1914k, 1914l, 1914m, 1914n, 1914o), informed Lee about major developments involving the Rockefeller philanthropies (Rockefeller, 1914p), discussed prospective editorial contacts (Rockefeller, 1914q, 1914r), and suggested content for Lee's campaign (Rockefeller, 1914s, 1914t, 1914u).

LEE'S BULLETINS STRATEGY

Following their initial meeting, Lee recognized that all the "excitement" in Colorado had already become old news, and that newspapers would not be interested in mere news stories. After he dismissed advertising as a vehicle, Lee drew on his work for the Pennsylvania Railroad's rate hike campaign as the strategic anchor for his effort.

⁶Materials collected by Bigelow included data compiled for government investigators, testimony, statistics on accidents, circulars sent to superintendents, maps, earnings data, correspondence, speeches by strike leaders, service records of superintendents and foremen, wage summaries for each mine, a brief history of the strike supplied by mine superintendents, and copies of the company's *Camp and Plant* house organ published from 1902 to 1904. Many of the original documents were retyped for Bigelow and Lee's use. Lee billed the Rockefellers \$391 for Bigelow's special work in Colorado and \$18.50 for a secretarial service to retype Bigelow's material (Lee, 1914b).

In a detailed memo to JDR, Jr., on June 5, Lee recommended publication of a series of leaflets or bulletins to be issued by the operators at Denver. He suggested as the title for the series, "The Struggle in Colorado for Industrial Freedom." He explained, "By sending these leaflets to a large number of leaders of public opinion throughout the country, you will be able to get certain ideas before the makers of that public opinion, which will be of value." Although he would include the press in the mailings, Lee essentially proposed to bypass journalists and go directly to the formulators of opinion. Lee included a long excerpt of remarks by Wisconsin Senator Robert LaFollette, who had lambasted the railroads' promotional effort in seeking a rate hike and had called it a "monument to shame" in a Congressional speech. But in doing so, LaFollette underscored the effectiveness of Lee's work. The 32 fliers Lee produced for the eastern railroads "played no small part in influencing a large proportion of the 22,000 newspapers in the United States," LaFollette said. It was a not-so-subtle example of Lee's salesmanship (Lee, 1914h).

Rockefeller responded by authorizing distribution of Bulletin No. 1, which Lee had provided in galley form. The obviously pleased client responded, "We cannot think of a better title for the series" (Rockefeller, 1914d). Lee had already suggested the topic of the second bulletin, an excerpt of the report of the military occupation of the strike zone. Lee envisioned as many as two bulletins being distributed every week over several months, creating a virtual avalanche of turn-of-the-century political direct mail.

Lee carefully crafted the design of the bulletins, which measured 5 × 11 in., printed on one side of good quality vellum stock in black ink. On June 15, Lee reported to Rockefeller that the first number was delayed, "owing to the fact that I want to get a typographic arrangement which is exactly as I think it should be." He assured his client, "The cumulative effort of this should be valuable" (Lee, 1914i). The initial run of bulletins included 11,000 copies, which were printed by the Beck Engraving Company and addressed by the Howe Addressing Company, both in Philadelphia. The printed materials were then shipped in bulk to CF&I in Denver, where they were mailed by a mailing service in envelopes imprinted with CF&I's headquarters address, "720 Boston Bldg, Denver, Col." Thus recipients would think the mailings came from the coal operators.⁷

In all, 19 bulletins were distributed. The 15 titles in Series I were sent on behalf of the industry between June and August 1914, and later were compiled into a *Facts* booklet distributed to some 40,000 people in Fall 1914 (Committee of Coal

⁷Mimeographic stencils were cut for more than 11,000 names, which Lee had compiled for his work for the Pennsylvania Railroad. Lee's first invoice showed expenditures of \$743 for printing the first four bulletins, \$1,187 for addressing and printing stamped envelopes. On average, each bulletin cost around \$350 in out-of-pocket expenses. In submitting his first invoice, Lee was careful to show how he spent his new client's money prudently. Individual envelopes were typed at \$3/thousand, while stenciling permitted the same work to be performed for 90 cents (Lee, 1914c).

Mine Managers, 1914). The four titles in Series II were published in the name of CF&I only, following the company's later split from other operators. Virtually all the material in the first series drew on information from various reputable sources in government and the community and was provided to Lee by CF&I or Rockefeller officials. Lee would later admit that he saw his role as primarily one of editor, not writer, of the bulletins (USCIR, 1916, vol. 8, p. 7899). He took already-existing materials and reworked them, adding introductions and transitions, and edited them for clarity and to bring out key points. Bigelow might have written many of the first drafts of the early numbers.

The effect was to create a deluge of information about the Colorado situation from a variety of angles. Ultimately, the mailing list for regular bulletins reached 19,000 names—including various individuals suggested in correspondence from Rockefeller, his staff, and CF&I officials. Lee provided small bulk quantities to the Rockefeller offices in New York and to President Welborn in Denver for distribution to personal contacts. Welborn later wrote Lee about how pleased he was with the way Lee was handling the project (Welborn, 1914b, 1914c). Welborn wrote JDR, Jr., “From the numerous letters of commendation I have received, and the frequent requests for additional copies of the bulletins issued under Mr. Lee’s direction, I am confident that the work he has inaugurated is doing some good.” The effort resulted in a few responses from newspapers, and many letters from ministers, educators, associations, and chambers of commerce (Welborn, 1914d).⁸

OTHER PUBLICITY ACTIVITIES IN 1914

Although the production of the bulletins is the most widely known—and controversial—of his activities, Lee provided counsel to JDR, Jr., and his staff on numerous topics and engaged in a variety of other activities. These included fending off sycophant promoters who wanted JDR, Jr., to fund their own promotional activities on behalf of the coal operators (Rockefeller, 1914k, 1914m, 1914v; Lee, 1914j, 1914k, 1914l). Lee also advised JDR, Jr., against writing an article requested by Arthur Brisbane, the newspaper editor who had recommended Lee for his position. Brisbane wanted JDR, Jr., to respond to critics who called for the nationalization of

⁸One unusual measure of Lee’s success lies in the response of the United Mine Workers of America (UMWA) District 15. If imitation is the highest form of compliment, Lee must have been pleased with himself. In August and September of 1914, the UMWA issued its own set of competitive bulletins—which utilized the exact same title, the same paper and format, and the same typography as Lee’s bulletins—but told the union’s side of the story. This set of 15 messages, which were written by District 15 publicity director Walter Fink, was an obvious effort to confuse recipients about the source. It was an ingenious, although deceptive, way to expose opinion leaders to the opposing viewpoint (United Mine Workers District 15, 1914). No concrete evidence suggests the union’s strategy worked, except that various numbers were reprinted in labor newspapers.

natural resources such as the coal supply (Lee, 1914m; Rockefeller, 1914w). Soon after being retained, Lee attended a 3-hr meeting with JDR, Jr., and his staff, arranged through JDR, Sr., with James Brown of the International Harvester Company (Rockefeller, 1914k). The Chicago executive shared some of the strategies that his company had used in earlier labor disputes. Lee later told the Rockefellers these tactics were similar to those he had used for the Pennsylvania Railroad (Lee, 1914n). Welborn would later write a series of letters to the editor, in response to negative press, as Brown had suggested. However, it is not certain whether Lee orchestrated this effort.

While in New York to meet with Brown, Lee met with Major Edward J. Boughton, a representative of Colorado's Governor Elias Ammons. Boughton had traveled east on a promotional tour to make public facts about the strike and the militia's response. His goal was to overcome the extensive negative publicity. Although the origin of the project is not clear, Lee seized the opportunity to draft a letter that could be signed by the governor of Colorado to outline the situation (Lee, 1914o). The idea was akin to the strategy proposed by Brisbane (1914), and JDR, Jr., himself dictated a four-page memorandum with talking points that might be included (Rockefeller, 1914h, 1914u). Although Lee thought the project had merit, he later admitted to JDR, Jr., that it was a tough assignment (Lee, 1914p, 1914q, 1914r). Although Lee sent a final draft out to Colorado, Boughton apparently never passed it on to the governor. Meanwhile, Ammons' views on the strike were published in a magazine article that received wide attention (Ammons, 1914).

Lee arranged at least two other mass mailings of materials other than his bulletins. One was a pamphlet issued by the Junior Order United American Mechanics union—an idea apparently initiated by JDR, Jr., after a copy was sent to him. Rockefeller's general counsel, Starr J. Murphy, consulted with CF&I President Welborn in Colorado, then turned over the assignment to Lee (Murphy, 1914a). A second mailing contained 20,000–30,000 reprints of a U.S. House of Representatives speech by Colorado Congressman George N. Kindel, which was sympathetic to the coal operators and attacked the union (Seligman, 1915).

Obtaining newspaper and magazine exposure per se was ancillary to Lee's strategy. In his first letter to CF&I President Welborn, Lee wrote,

I am eager to get out to the press an article showing, in the first place, that the companies are now mining all the coal that [the] market can absorb, and secondly, that there has been no ruthless destruction of life by either the mine guards or the militia. (Lee, 1914f)

The bulletins thus doubled as press statements and were distributed to a large number of editors across the country as part of the broader distribution (Lee, 1914s). Welborn in Denver made it a special point to distribute copies to the local media.

About 6 weeks into the campaign, Lee sent Welborn a letter with the draft of a letter that he recommended be sent over Welborn's signature to about 30 newspapers in 19 major cities. In part, Lee's attached letter to the editors read,

As you are aware, the public mind with reference to this Colorado situation has been very befogged by the attempt to make sinister capital out of the use of the Rockefeller name. That effort was most unfair and unwarranted, for no matter what Mr. Rockefeller's interests in Colorado may be (and they in fact represent but a fraction of the coal mining industry), he has not attempted to control the situation in this State in any way and, as a matter of fact, he could not have controlled it if he had desired. (Lee, 1914t)

Lee's draft for Welborn denied that a legitimate strike was in progress. The letter argued that peace and quiet could only be secured if "enlightened public opinion" makes it "clear to the so-called strike leaders that it is their responsibility to insure law and order."⁹

LEE'S TRIPS TO COLORADO

Lee's daytime work kept him on the East Coast for the first 2 months. His primary contact with the Colorado operators was through a trip to Binghamton, New York, the home of CF&I Chairman Lamont Bowers (Lee, 1914a), as well as correspondence with President Jesse F. Welborn in Denver. Beyond these contacts, he was dependent on the reports brought back from Bigelow and materials provided by others.

By summer, Lee was ready to investigate the situation first-hand, and he embarked on the first of two trips he would make west in as many months. Lee wrote JDR, Jr., that although he planned a European trip with his family, he would forego the vacation and go to Colorado instead (Lee, 1914t). On July 17, Lee had sent JDR, Jr., a set of employee house organs (which Lee called "bulletins") produced by the Pennsylvania Railroad (Lee, 1914f). JDR, Jr. charged Lee with sending samples to Welborn in Denver (see also Lee, 1914u, 1914v) and asking Welborn whether a comparable approach would be useful at CF&I (Rockefeller, 1914x).

Few details are known about Lee's visit, except for two letters he sent to JDR, Jr., and indirect references. In his preliminary report, Lee explained that he had met in a

⁹Rockefeller general counsel Starr J. Murphy congratulated Lee on the letter, which he forwarded to JDR, Jr. (Murphy, 1914b). In turn, this prompted JDR, Jr., to ask whether editors shouldn't be receiving the bulletins (Rockefeller, 1914x). Lee reminded him that the editors, indeed, were receiving the bulletins regularly. The personal letter from Welborn was to reinforce key points (Lee, 1914u).

Lee issued virtually no press releases or statements during the first months of his campaign, except two announcements in July on behalf of the Rockefeller Foundation related to the Institute for Medical Research and a major gift to Johns Hopkins University. The press announcements were an apparent surprise to JDR, Jr., who expressed pleasure with the coverage that was undertaken while he was out of town (Rockefeller, 1914y; USCIR, 1916, vol. 8, p. 8869; Hiebert, 1966a, p. 114). Significantly, these announcements made no mention of the Colorado situation.

series of meetings with President Welborn and Chairman Bowers, generally separately. In particular, Welborn was enthusiastic about the bulletins (as were several of the other operators) and embraced the issuance of more employee communications. "For the moment, I'll only say that it seems clear to me that intelligent sympathetic handling of the human nature of the case should yield results which would be most satisfactory to you and your associates," Lee wrote JDR, Jr. (Lee, 1914w).

Lee spent 2 days touring the southern mining camps, located 180 miles south of Denver. He spent 2 nights in Trinidad, the major town, toured eight mines, and visited the strikers' tent colonies at Ludlow and Starkville. He ate lunch with a superintendent one day and took lunch at a boarding house for miners the other day. He talked with women, military officers, mine supervisors, politicians, and others. In Denver, he visited with officials such as the Austrian consul, Fritz van Fischer-Ankern. He also met Horton Pope, the former general counsel of Victor-American Fuel, a major competitor. He visited no editorial offices because he did not want to generate a lot of visibility about his presence (USCIR, 1916, vol. 8, p. 7900).

Lee was the first representative of the Rockefellers outside of CF&I management to visit Colorado following the strike. On the trip, he assessed management, labor, and public opinion. He found that Coloradans exhibited indifference toward the operators and antipathy toward the union. Their concerns were mostly to "protect the good name of the state." Otherwise the state might face an economic decline because investors would be hesitant to risk money in the area (I. L. Lee, Jr., cited in Atwater, 1967, p. 57).

The visiting publicist found CF&I's management, particularly Chairman Bowers, to be largely unenlightened about labor issues.¹⁰ Lee also quickly recognized the undue influence exercised by John C. Osgood of the Victor-American Fuel Company. Osgood was a rabid, anti-union fanatic, and was the most vocal member of the three-person coordinating committee. "Mr. Osgood is a load your people are having to carry. His relation to this affair has been a great handicap to your general cause and still is," Lee wrote Rockefeller (Lee, 1914x). Although direct evidence is not available, Lee appears to have played a pivotal role in CF&I's breaking ranks with other coal operators and in Bowers' removal as CF&I chairman at the end of the year.¹¹

Lee also blamed many of the problems on middle management in the mine district. Lee wrote,

¹⁰Lee found that CF&I Chairman Bowers employed 19th century management philosophies that were clearly more aligned with those of John D. Rockefeller, Sr. As the uncle of Frederick T. Gates, a highly influential, long-time adviser to JDR, Sr., and the staff, Bowers' opinions had been accepted without question in New York. Lee concluded, however, that Bowers had misled the Rockefellers by exaggerating the situation. He became convinced that Bowers should be replaced.

¹¹Later, in the fall of 1914, Lee asked an official of the Pennsylvania Railroad to make inquiries in Cleveland about Lamont Bowers. The result was a damaging letter that would eventually play a critical factor in Bowers' dismissal in December 1914 (Rockefeller, 1915a). JDR, Jr., obviously had Lee's ear on the point that Bowers had to go.

The men are very well paid, and the policy of the management is most enlightened as to all important subjects. But the mine superintendents and petty bosses have all the faults of their kind and the Company has no assurance that its policies are being carried out. There is no appeal (in practice) from the decision of the pit boss. (Lee, 1914x)

He added, “The men are afraid to complain or appeal. This is a distinctly missing link here. There is no safety valve for the men to get petty grievances out of their system” (Lee, 1914x).

To open up the lines of communication, Lee recommended that an open letter from Welborn be published as a poster. The poster’s message would thank the miners for their loyalty during the strike. He also suggested that leaflets be distributed to miners’ homes because women could influence miners’ opinions and were Colorado voters. The apparent plan was to prepare these posters and send them to Colorado (Lee, 1914x).

Until his visit, Lee had undertaken no special efforts to influence opinion in Colorado. Although most residents did not favor the union, citizens were more outraged by the militarism that had taken place and the negative light shed on Colorado. Lee informed JDR, Jr., that he was adding the names of lawyers and clergyman in Colorado to his mailing list. He also said that citizens were hostile to the Rockefeller name, and did not understand the family’s limited role. To rectify the false impression, Lee recommended that a future bulletin detail the extent of Rockefeller’s holdings: “I want to contrast the amount paid to you with the amount put into the property out of earnings, showing your policy has been to build up the Company (and thereby to build up Colorado) rather than to get quick profits or to exploit the people here” (Lee, 1914x).¹²

Overall, Lee’s first trip to Colorado was a success—and pivotal in enhancing his ability to understand the issues, counsel his clients, and cement his relationships. Greene wrote JDR, Jr., that Lee had

planted so tactfully into the minds of Mr. Welborn and Mr. Bowers the seeds of some ideas new to them, that they will develop in an apparently spontaneous manner, which will, of course, be ever so much better than to force the ideas upon them against their will. (Greene, 1914c; also cited in Atwater, 1967, p. 58)

¹²When JDR, Jr., later asked his staff to develop the data, he was met with strong doubts. Charles O. Heydt compiled a complex report but balked at the idea of releasing such private information. Heydt even sent a memo to JDR, Sr., to tell him what was taking place (Heydt, 1914a). In turn, JDR, Jr., had to explain to the doubting Heydt that Lee simply wanted summary numbers—not a detailed schedule of transactions (Rockefeller, 1914z).

LEE RETURNS TO HELP FACILITATE COMPROMISE

Lee returned to the East Coast briefly, only to return to Colorado to assist CF&I officials with communications related to a pending strike settlement. This important aspect of Lee's work for the Rockefellers has been largely ignored to date. On September 5, as Lee had been told during his Colorado visit, the union wrote President Woodrow Wilson to waive its demand for union recognition in exchange for a 3-year oversight commission empowered to enforce binding arbitration. Earlier, the union had written Rockefeller in August to appeal for a settlement (Hayes, 1915).

On September 10, Lee sent a hand-written note to Greene. "It seems to me that here is *the chance* [underscored in original] to get Mr. Rockefeller's position on the matter before the people. If I can help in any way, [I] would be glad to come over to-morrow" (Lee, 1914y). Without delay, Lee arrived in Colorado on the following Monday, September 14, and spent several days helping Welborn and CF&I attorney Fred Herrington frame a letter that would be sent by Welborn to President Wilson. Lee's editing artfully included phrasing prepared in New York by Rockefeller's general counsel, Murphy (1914c). Welborn told Rockefeller, "Through the invaluable efforts, and what seems to me is almost if not infallible judgment of Mr. Lee, our letter to the President has been prepared and will be mailed tonight." Welborn acknowledged Lee as the "proper" author and noted that Lee had developed "a more comprehensive grasp of the conditions in Colorado than I would have thought possible for any man to do in the time that he has spent here" (Welborn, 1914e).¹³

Lee's letter was highly conciliatory, but articulated CF&I's concerns with the proposed settlement. Lee's enlightened public relations philosophy was reflected in the letter's conclusion:

For many years past our company has made systematic efforts to promote the welfare and happiness of its men. We fully recognize that the interests of stockholders and employees are really the same and neither can prosper permanently unless the just rights of both are conserved. . . . We are now developing an even more comprehensive plan, embodying the results of our practical experience, which will, we feel confident, result in a closer understanding between ourselves and our men. This plan contemplates not only provision for the redress of grievances but for a continuous effort to promote the welfare and the good will of our employees. (Welborn, 1914g)

¹³In a separate letter to general counsel Murphy, Welborn referred to the "invaluable assistance" rendered by Lee. Welborn also apologized for not coming to New York to consult in person. He explained, "Considering the probable public criticism of my presence at your office at the time when it would have been generally known that the answers to the President's proposal were being prepared, I think it very fortunate we were able to make a reply direct from Denver, with the public fully informed as to my presence here" (Welborn, 1914f).

Significantly, it was Wilson's proposal that drove the final wedge between CF&I and the other coal operators. CF&I undoubtedly was under pressure from Rockefeller to avoid additional confrontation. On September 18, while Lee was in Denver and probably with Lee's assistance, Welborn issued a terse statement that said the coal operators would make individual replies to the president's proposal. He added that some of the operators sought a meeting to discuss the difficulties created by the proposal (Coal operators will make reply, 1914). By contrast, the other operators issued statements that flatly refused any form of arbitration (Correspondence between the President of the United States and the Colorado coal mine operators relative to the strike in that state, 1914; Owners reject Colorado truce, 1915). In Washington the following week, Welborn met with Wilson, who would not compromise (President firm for mine truce, 1914). Thus, the stalemate continued for another 2 and a half months. The coal strike ended officially on December 8, 1914, support by the miners dwindled, and the union's funds were depleted.¹⁴

Lee leveraged CF&I's conciliatory response into a positive publicity opportunity. Welborn's letter to President Wilson was typeset and distributed widely as a booklet (so was the response from the other operators). Lee finally drafted the poster he had proposed previously. The message thanked both the workers who had stayed on the job, as well as those who had returned. The poster added expressed a quite enlightened approach to labor relations that was undoubtedly infused by Lee:

It is the purpose of our Company not only to pay high wages, but to make all other conditions of employment satisfying to our men.

We want every man who works for The Colorado Fuel and Iron Company to feel that the Company is his friend.

We will at all times be glad to have you send us, in writing, any suggestions which you may feel will advance your own welfare, that of your fellow workers, or that of the Company.

We want every man to be happy in his work, and we will hope you will help us to make you so. (Colorado Fuel & Iron Company [CF&I], 1914a)

Lee also wrote a series of four newspaper ads, which appeared in Colorado newspapers beginning Saturday, September 19, under the theme "That Colorado May Know!" This use of advertising was in sharp contrast to his advice to JDR, Jr., against the use of advertising only 4 months before. The ads varied in their appearance, suggesting the text was sent to newspapers via telegraph and then typeset by the publishers. The series relied heavily on financial information about the com-

¹⁴CF&I officials in Denver were greatly relieved. But the prospect for returning to prestrike levels of production were limited by a reduction in demand from the railroads, one of the company's biggest customers, as well as a "dullness" in the demand for steel rails, the principal product of CF&I's steel works in Pueblo (Welborn, 1914h).

pany's operations. The first ad, for example, pointed out that open shop mines were more productive and that workers, on average, earned wages that were 27% higher than unionized mines. Another ad compared wages in Colorado to elsewhere in the world. A third ad explained how the company generated \$100 in wages for every \$1 paid to stockholders. The last ad recounted the wages paid in every mine to the "army of loyal employees, who in their silent fashion manifested their preference to work in the 'open shop' promised to them at these mines, where any good workman, union or non-union, is welcome" (CF&I, 1914c).

ACTIVITIES IN AUTUMN 1914

Following his second trip to Colorado, Lee returned to the East Coast. After nearly a month away from his duties at the Pennsylvania Railroad, he had to focus attention on the needs of his employer, which was still awaiting word on its rate increase. However, during the fall of 1914, Lee produced four more bulletins, which were issued under the Series II for CF&I alone, maintained important contacts with the Rockefellers, and engaged in scattered other activities.

Immediately upon his return, Lee met with Rockefeller and his staff in New York. Welborn attended the meeting as well, and reported to the group on his talk in Washington with President Wilson. At the New York meeting, Lee met for the first time William Lyon Mackenzie King, the former Canadian minister of labor, who was retained by the Rockefeller Foundation to conduct a study of labor conditions in the United States, including Colorado.

By October, the stature of Lee in the minds of Rockefeller's staff was evidenced when general counsel Starr J. Murphy wrote Lee for advice on how to dispose of a pestering publisher, H. H. Lewis of *Industrial News*: "I am in hopes that your diplomatic and tactful mind will suggest some way of getting rid of the gentlemen without any serious damage" (Murphy, 1914d; Lee, 1914z). Lee also leveraged his position at the Pennsylvania Railroad, a major producer as well as user of coal, to obtain valuable intelligence about how union officials saw labor conditions in Colorado (Lee, 1914aa). Finally, he consulted with Rockefeller Foundation officials on a release they had prepared to announce the appointment of William Mackenzie King as a labor relations consultant (Greene, 1914d).

Soon after launching the program, Lee hired several clipping services to retrieve stories from national newspapers. The clips were analyzed by Lee's assistant, W. T. Pollack, who began his work with Lee in Philadelphia and continued to work for Lee in 1915. The single extant copy of the reports suggests that the reports were produced about three times a month. Pollack's analysis shows that 47 editorials were received in the 10-day period from November 1 to 10, 1914. The report showed that 28 of the stories were positive, 14 negative, and 5 neutral. The

report also noted that several editorial replies by President Welborn were included in the coverage (Pollack, 1914).

LEE JOINS THE ROCKEFELLER STAFF, CONTROVERSY BREWS ABOUT ROLE

In November, Rockefeller and Lee discussed the prospect of the publicist joining the New York staff—an idea apparently initiated by JDR, Jr.¹⁵ In a letter, Lee said he would be honored but said he would require a salary of \$15,000 a year, plus moving expenses—a figure higher than the \$12,000 Rockefeller had suggested. Lee justified the 50% increase in salary (compared to the \$10,000 he was earning at the Pennsylvania) based on the higher cost of living in New York, lost perquisites, and the salaries of several of his peers at other major industrial concerns (Lee, 1914bb). After some haggling and then paying Lee for his work to date, Rockefeller agreed to Lee's terms (Rockefeller, 1914aa, 1914bb, 1914cc). Lee would join the staff on January 1, 1915.

Lee was busy during his remaining month as a consultant. He wrote a 1,500-word article under Welborn's byline for *Harper's Weekly*, which was never published. He also wrote the bulletins devoted to the conclusion of the strike and produced a report for Rockefeller Foundation's General Education Board. His strategy in this reputation-enhancing activity for the Rockefellers involved "giving a little to the papers every day or so" (Lee, 1914cc; USCIR, 1916, vol. 9, pp. 8810, 8875). On December 7, Lee's appointment to the Rockefeller staff was announced in a press release (Office of Messrs. Rockefeller, 1914). The release was based on a memo originally drafted by Murphy (1914f; Heydt 1914b).

Not coincidentally, the announcement coincided with the convening in Denver of the first hearings on the Colorado strike by the U.S. Commission on Industrial Relations, which had been established by Congress in 1912 to study labor-related troubles. Lee was the first Rockefeller associate to learn about the investigation and informed JDR, Jr., about the details during the summer (Lee, 1914g). Lee later corresponded with his client about the impending proceedings in October (Lee, 1914dd; Rockefeller, 1914dd).

Commission Chairman Frank P. Walsh, a highly partisan, pro-labor congressman from Kansas City, was unabashedly out to attack Rockefeller and the coal mine operators for their role in the strike. Lee was quite familiar with Walsh, based on previous USCIR hearings involving the railroads (Hiebert, 1966a). Lee wrote Welborn that he was concerned about the hearings and disappointed that

¹⁵General counsel Murphy first raised the prospect of hiring Lee on a full-time basis in a memo to JDR, JR., on June 28, following an extensive lunch. Murphy thought Lee might "go so far to some day give us all of his time" (Murphy, 1914e).

Governor Elias Ammons and Governor-Elect George A. Carlson were unable to persuade Walsh to postpone them. Lee was unable to attend, but did not think at the Associated Press would be as sensational as it had been in past months (Lee, 1914ee).

Lee's bulletins would quickly become the focus of controversy in the hearings. Perhaps because of his part-time consulting role, Lee did not aggressively verify many of the facts he was given. Or he and his staff might have been simply careless in handling material. Of the 19 bulletin issues, more than half had problems that ultimately surfaced. Perhaps the most significant error was the misstatement and miscalculation of union officials' salaries in Bulletin 14. Welborn and others had quickly identified the problem. In fact, Welborn telegraphed Lee to alert him that an error had been found, but did not say what it was. Welborn recommended that it be corrected in the then-forthcoming *Facts* booklet. He noted, "Number Fourteen has brought out some questions that cannot be easily answered," suggesting that Welborn really did not know the source of the error (Welborn, 1914i). Not recognizing the enormity of the error, Lee simply suggested that a correction be inserted in Denver (Lee, 1914ff). The problem was soon recognized by John A. Fitch of *The Survey*, probably with the aid of disgruntled union leaders, who undoubtedly faced questions from their rank-and-file membership. Fitch obtained the correct figures from the union, and challenged Lee. An embarrassed Lee later promised Fitch that a bulletin correcting the error would be issued and that future mailings would include an errata sheet (Lee, 1914gg). Separately, crusading journalist George Creel devoted a two-part *Harper's Weekly* series in November 1914 to a critique of the coal operators' bulletins, without knowing who had produced them (Creel, 1914a, 1914b).¹⁶ However, despite Lee's efforts to rectify the problem, copies were still being circulated without the correction.

CF&I President Welborn, one of the principal witnesses in Denver, was drilled by Walsh about various aspects of the strike and about the bulletins. Walsh wanted to know who wrote them, how the content was obtained, and the cost of producing them. The initial discussion went on for nearly an hour without naming Lee because Welborn did not feel comfortable giving Lee's name, despite the fact that Walsh had already learned the author's name (USCIR, 1916, vol. 7, pp. 6570–6586). Indeed, Lee had telegraphed him to say he hoped Welborn "can keep my name out of the record, for to mention it just now might create a false impression." Lee wanted to be sure no mention was made of the Pennsylvania Railroad to avoid embarrassment and avoid reinforcement of unwarranted press reports that the Rockefellers controlled the railway. He authorized Welborn to show the message to Walsh (Lee, 1914hh). Two hours later, Lee wired Welborn that he had consulted with Rockefeller, who agreed that a full statement should be made (Lee,

¹⁶Clarifying the errors in the bulletins was probably one of the key points that Lee would have included in his unpublished *Harper's Weekly* article (see earlier discussion).

1914ii). Then, an hour later, another telegraph from Lee contained a full statement. Lee's wire said that Rockefeller would take responsibility for whatever role he played—but would leave the decision up to Welborn. Lee coached Welborn to not be defensive, but to stress that the Rockefellers and the operators had every reason and right to present their case to the public. He suggested that the operators could issue yet another bulletin that corrected any verified inaccuracies (Lee, 1914jj).

Walsh persisted throughout the afternoon hearings and, in a mild threat near the day, told Welborn that he had submitted the issue to his colleagues “to take such action as they deemed necessary.” The members, in turn, decided to call for the name (USCIR, 1916, vol. 7, p. 6609). Welborn asked to consult counsel. Before Lee's statement was received, Welborn had wired Lee that attorney Cass Herrington and he had negotiated a deal so that Lee's name would be given to the chairman on a confidential basis, and Lee would be permitted to appear when the commission met in the East (Welborn, 1914j). But when Welborn was recalled the following morning, he read the full telegram from Lee that explained the publicist's role (Lee, 1914kk; USCIR, 1916, vol. 8, pp. 6668–6669).

In his fourth telegram, sent that morning, Lee instructed Welborn to read his telegram and to make clear three points: (a) the operators were fully responsible for the bulletins, (2) Lee served as an adviser to Rockefeller and the operators and “in no sense as an intermediary with the public,” and (c) his concern was to get the accurate facts out to the public, including correction of any inaccuracies (Lee, 1914kk). Lee wrote Welborn the following day to apologize for not being in Denver to shoulder the embarrassment Welborn had endured. Lee explained that his primary concern was to avoid adverse publicity for his employer, the Pennsylvania Railroad. Otherwise, he thought there was nothing that should not be disclosed, and that delaying the announcement would have infused unneeded intrigue. Lee added,

Most of the newspapers treated me very decently though the Philadelphia Public Ledger for some occult reason tried to see things in it, which of course noone [*sic*] could imagine. I have presumed that you have had your hands pretty full in taking care of this situation, and I want here and now to express my very deep appreciation of your loyalty to me and to our agreement. You have certainly done the square thing, as of course anyone might have known you would do. (Lee, 1914ll)

Lee was obviously embarrassed by the episode. On December 7, the first day of the hearings, he fired off a letter to JDR, Jr., to provide copies of the telegrams he had sent. “We did nothing but was perfectly proper and in entire good faith,” he wrote to assuage any concerns by Rockefeller. He reminded Rockefeller that any inaccuracies were based on information that had already been published and that “there was no thought that it was incorrect.” He assured his client that he was “taking the proper course in right away telling the whole story and offering to set the matter right in case any injustice has been done to anybody” (Lee, 1914mm). Four days

later he would write extensive explanatory letters to Murphy and Greene. He pointed out to Murphy that none of the other statements were questioned. “There is some question as to the precise accuracy of some of the phraseology, but I cannot see that any specific fact is called into question in a manner in which gives makes opportunity to make any correction” (Lee, 1914nn). Lee wrote Greene:

It is very unfortunate that any inaccuracies should have been made in any of our bulletins, because as you say they are likely to make people think that the inaccuracies are typical. I console myself with the belief, however, that most people who receive the bulletins are intelligent, and that they will realize from reading the bulletins that they bear evidence of intrinsic accuracy. (Lee, 1914oo)

Generally, coverage about the revelations in Denver was limited to newspapers in Colorado, Philadelphia, and New York. However, as news about employment by the Rockefellers became more widespread, particularly in early 1915, Lee became the subject of considerable publicity. Many newspapers played the announcement straight, while others were more complimentary—even if in an off-handed way. For example, *Financial World Magazine* wrote,

No newspaper hack for the Rockefellers. They got hold of Ivy Lee, who for years looked after the publicity for the Pennsylvania Railroad, and asked him to keep in touch with the press by providing the newspapers with their company’s attitude in the controversy. For this work they pay Lee around \$1,000 monthly. He’s worth it all, down to the last penny. (*Financial World*, 1915)

Others lampooned Lee, who they accused of being “perfectly willing at the salary stated to play the clinging ivy” (Sioux City, 1915). One small Colorado paper noted that Lee was not just a mere press agent but a “high brow disseminator.” The next day, the paper observed, “One thousand dollars per month seems a fair salary for Rockefeller’s high brow publicity man, but a printer or a barker would have one — of a time pulling through on such a measly salary. That duffer should join the union” (*Durango Democrat*, 1915). Carl Sandburg (1915), who would later become a noted poet, called Lee a “hired slanderer” and “paid liar” in the *New York Call*, a socialist newspaper. Upton Sinclair later dubbed Lee “Poison Ivy”—an epithet that he claims originated with Colorado miners (Sinclair, 1919, pp. 311–313).¹⁷ A particularly scorching exposé on Lee himself appeared in the socialist magazine *The Masses* (Seligman, 1915), although criticisms of the Rockefellers’ actions in Colorado and their efforts to explain their role were published for another 6 months.

¹⁷For a review of other criticisms of Lee, see Hiebert (1966a, pp. 297–318).

JANUARY 1915 COMMISSION HEARINGS

The tumult of early December 1914 continued into January 1915, as Lee relocated from Philadelphia and took a place on the small Rockefeller staff in New York. Rockefeller and Lee were both subpoenaed to appear before the USCIR hearings to be held in New York. One of Lee's first tasks was to help complete two extensive questionnaires, and then a set of supplementary questions, provided by the USCIR staff. To help frame the responses, Lee sought advice from several of his contacts in the railway industry (E. Lee, 1915; see also Scheyer, 1915).

Most of what is known about the preparations for the hearings is found in the diaries of William Mackenzie King, the labor consultant. As early as January 11, two weeks before Rockefeller's appearance, Rockefeller's staff was divided about the strategy that should be undertaken. In an example of the classic standoff between public relations professionals and attorneys, Lee advocated a strong proactive stance that included publishing information prior to the hearings, while general counsel Murphy took the opposite position (Mackenzie King, 1973, pp. 77–78; also p. 94). In another dispute, Lee (with King) successfully argued that the Commission's concerns about the Rockefeller Foundation's activities should be separated from the Colorado situation. But Lee was forced to acquiesce to King's argument that questions related to general labor policies should be addressed before the specific Colorado problem (Mackenzie King, 1973, pp. 125–126).

With the surprise announcement that JDR, Jr., would be called on a Monday morning, Lee recommended (with King) that his testimony be distributed in advance for publication in the morning papers. Editorial changes continued for several more days, until Friday night when Lee submitted the final statement to the printer. Lee also distributed a 14-page typeset press release (Office of Messrs. Rockefeller, 1915a).

On the rainy morning when JDR, Jr., gave his testimony, the New York City newspapers were filled with publicity. Upon arrival at City Hall, where the Commission had rented a hearing room, Rockefeller and his entourage entered through the front door. Rockefeller's arrival was deliberately planned. An account by Lee's brother, J. Wideman Lee, contends that Lee objected to the assumption made by aide Jerome Greene that JDR, Jr., should slip through the rear door. "The days of the rear-door philosophy are over. Mr. Rockefeller will have to enter through the same door as everyone else" (Berlin, 1946, pp. 80–81; Hiebert, 1966a, p. 104).

That evening, Lee and Mackenzie King both coached JDR, Jr., about his first day's testimony. As possible, they suggested that he clarify his position on the right of union officials to enter camps, explicitly state his opposition to a 7-day work week, and express his resolve to solve CF&I's problems—even if the Colorado managers were offended (Mackenzie King, 1973, pp. 146–147). The following morning, Lee and Mackenzie King both urged JDR, Jr., to be honest in expressing his own beliefs and principles, to ignore the motives of the commis-

sioners, and to sound a human note in expressing his feelings. The advice seemed to work.

By most accounts, Rockefeller's performance on the witness stand was better on the second day. Indeed, when JDR, Jr., concluded his testimony that afternoon, he graciously thanked the commission, despite mistreatment by the chairman. JDR, Jr., then received a thunderous ovation from the packed audience (USCIR, 1916, vol. 8, p. 7895). The January hearings were a seminal event in swaying public opinion concerning the coal strike and Rockefeller's role in it. Later, Lee would widely disseminate JDR, Jr.'s prepared statement as a pamphlet (Rockefeller, 1915b), generating considerable demand for additional reprints and favorable responses from opinion leaders (Lee, 1915a; Welborn, 1915a, 1915b).

As part of his calculated attack on Rockefeller, the Commission on Industrial Relations' chairman, Walsh, clearly attempted to position Lee as the secret manipulator of Rockefeller's actions. By putting Lee on the witness stand, Walsh hoped the publicist's testimony would serve as an irrefutable indictment. Lee was drilled about his lack of knowledge about the situation in Colorado, the source of errors in his bulletins and his efforts to correct them, the impropriety of writing a letter for the governor of Colorado, and more (USCIR, 1916, vol. 9, pp. 7897–7916). Lee's response to the commissioners' leading questions can be summed up in this statement:

My job is simply that of adviser and I advise my clients to tell the truth. I think you and I have somewhat different opinions as to the function of a publicity agent. My theory of a publicity agent is that he should not act as an intermediary. The old theory of a publicity agent is that his function should be to take what his employers give him to hand to the press, and then to use his influence or any other way that suggested themselves to him, and get it published. That is totally foreign to my idea. My idea is that the principal himself should be his own publicity agent; that the function of a person like myself, for example, when acting in that capacity, should be to advise with the man who is to take responsibility for the act itself as to what he should do and what he should say, and that he should do the same. (USCIR, 1916, vol. 8, p. 7911)

Lee's testimony produced hackles from the hearing room several times. He was nailed by several commissioners, especially Austin B. Garretson, president of the International Brotherhood of Railway Conductors. Garretson asked Lee if his mission had been "that of the average publicity agent ... to give the truth as the man who you were serving for saw it." Lee responded, "As to your characterization, I don't know that I can give the answer" (Quoted in USCIR, vol. 8, p. 7910; also see Hiebert, 1966a, pp. 101, 298).

Although Lee's demeanor during the testimony was undoubtedly an effort to avoid being trapped by Walsh through leading questions, Lee failed to charm the commission. One newspaperman wrote Lee "was there with the eye of a general staging a battle ... with the acuteness of a man who wants the headlines to read his

way and who knows how to see that they do” (Wright, 1915). Yet, Lee appeared to be evasive, uniformed in some points (Raucher, 1968), and possibly contrite—an aspect that is surprising to many Lee admirers. But, Lee was only human. Lee would later sum up his reaction this way:

And then they put me on the stand for a grilling. I felt very much embarrassed about my own testimony because I had to make it clear that the responsibility for the substance of the bulletins was on the Colorado operators. As you had already taken full responsibility, of course, the testimony was simple. The Commission evidently thought I was a pretty crooked kind of person, and their questions were decidedly unpleasant; but I was equally aggressive in claiming that whatever I did was in the utmost good faith. I also insisted that if any errors were made, they were made unwittingly, and that we were only too glad to correct them. I think the testimony as a whole left a good impression on the minds of the Commissioners. (Lee, 1915b)¹⁸

In the several days following the January hearings, JDR, Jr., held personal meetings with UMWA national vice president Frank Hayes, “Mother” Jones, and Colorado union local leader John Lawson. This was a marked break from the past, when Rockefeller distanced himself from direct involvement. Mackenzie King was primarily responsible for arranging these meetings, but Lee was integrally involved. Mackenzie King notes, for example, that Lee and he both advised JDR, Jr., that the meeting with Hays be held in Rockefeller’s office (Mackenzie King, 1973, p. 152). At the conclusion of Rockefeller’s meeting with Hayes, Lee marshaled a bevy of press people waiting outside the door to talk to the participants. Lee wrote Welborn that he thought “much good had been accomplished during the week” and “that a much better feeling has been established. This is the main thing, and it is what we all here want to work to develop” (Lee, 1915b).

Throughout this period, Lee continued to carefully monitor press coverage through clippings. An analysis of press clippings about the hearings by Lee’s assistant, W. T. Pollack, showed that 520 newspapers ran editorial commentaries on

¹⁸Nothing suggests that the beleaguered Rockefeller was particularly concerned by Lee’s testimony. Indeed, he already been skewered himself. A week after the hearings, Greene responded to a crank observer who had written with advice on how the Rockefeller Foundation should handle its public affairs. “As approved and honorable ways of doing the latter Mr. Lee will be a competent valuable adviser to Mr. Rockefeller, and I shall not hesitate to ask his advice myself if occasion requires because I know him and respect him. If the operators in Colorado committed on unpardonable fault it is that they did not sooner enlist some one [*sic*] to perform the very service which Mr. Lee performed so ably for them. I do not hold him responsible for the one egregious blunder in regard to the compensation of union officials, though I wish he had caught it before it was too late” (Green, 1915). Gitelman (1988, p. 60) opined that the stir created by the bulletins seemed to be only a minor irritant to Lee’s client. And only a decade later, one profile of Lee described the entire incident as “ancient history” to be uncovered in the musty, worm-eaten reports of the Commission (Pringle, 1926).

the hearings. Of these, Pollack identified 311 as being favorable and 88 as being neutral toward Rockefeller's position (Pollack, 1915).

LEE NAMED A CF&I DIRECTOR

Quickly on the heels of the January hearings, on January 29, Lee was elected a director of CF&I—one of several directorships that he would assume as a representative of the Rockefellers. Following his formal appointment, Lee wrote CF&I President Welborn to assure him of his desire to cooperate in any way Lee could (Lee, 1915b).¹⁹ In a note that Lee would later route to JDR, Jr., and Murphy, Welborn acknowledged that he had been looking forward for about 4 months to the time when Lee would become an active director in the company (Welborn 1915c; see also John D's press agent member CF&I board, 1915; Ivy Lee on Fuel Co. board, 1915).

Immediately following the USCIR testimony, Lee was inundated with work (Lee, 1915c). Among his activities was the ordering and distribution of the last lot of 1,000 *Facts* booklets, which he made sure were amended with an errata sheet, distributed copies of the Commission testimony (which generated numerous favorable responses), and shipped leftover materials to Denver (Lee, 1915d, 1915e, 1915f, 1915g; Welborn, 1915d, 1915e, 1915f, 1915g, 1915h).

Controversy continued during the 3rd week of February. On February 15, USCIR Chairman Walsh, reeling from the drumming he received at the hearings, told his hometown reporters in Kansas City that JDR, Jr., had testified that funds of the Rockefeller Foundation could be used to establish a strike-breaking agency. Walsh denied making the statement, but the comment attributed to Walsh was widely reported by newspapers. Despite an admonition from Mr. Rockefeller, Sr., to do nothing (J. D. Rockefeller, Sr., 1915), JDR, Jr., authorized Lee to issue a rebuttal 2 days later (Office of Messrs. Rockefeller, 1915b). Walsh then lashed back and attacked Lee as the source of the statement. Not surprisingly, Walsh coyly reminded the public that Lee had prepared the erroneous bulletins distributed the prior year (Frank Walsh sees hand of Ivy L. Lee, back of John D., 1915; Walsh back at John D. Jr., 1915).

¹⁹Lee apparently developed a close affinity with Welborn. The day after he inked his agreement with Rockefeller in November 1914, Lee wrote Welborn a personal letter telling of his decision. "I need not tell you that there are few among the personal aspects of this matter which give me greater pleasure than the thought I shall be associated somewhat actively with your interests and your good self. I have appreciated most deeply the splendid support which you have given the efforts I have made on behalf of your Company and I have appreciated even more keenly the exceptionally hearty personal attitude which you have so uniformly displayed to me. As you are aware, in leaving the Pennsylvania Railroad, I shall be retiring from a personal relationship of almost unique attractiveness, and it is more than satisfying therefore to feel that in the new work I shall be forming relationships with people like yourself" (Lee, 1914aa).

Then, following CF&I's break with the remaining coal companies, 71 Colorado coal operators wrote President Woodrow Wilson to voice their opposition to the appointment of the three-person Low Commission to study the Colorado situation. Lee telegraphed Welborn to explain that the other operator's letter had been published in the Eastern papers. Lee urged Welborn to send his own conciliatory letter to Chairman Seth Low. Lee undoubtedly consulted in drafting the response, which gently suggested that there was no need for intervention by the Commission because CF&I intended to retain its own mediator (CF&I side steps Wilson mediators, 1915; Lee, 1915h; Welborn 1915i).

EFFORTS TO RESOLVE LABOR STRIFE

Much of Lee's work as a staff member in 1915 revolved around resolution of CF&I's underlying labor problems. Among his duties, Lee fended off direct requests for financial assistance, which he referred to CF&I officers in Denver (Lee, 1915i). He also monitored information received from company officials and others about what was happening in Colorado—information that found its way into a memo JDR, Jr., sent to CF&I President Welborn (Rockefeller, 1915c). Lee obtained and forwarded a confidential report on the desperate financial state of the UMWA (Lee, 1915j). He also politely declined a request from the Austrian consul (whom he had met on his first trip to Denver) for \$16,956 in restitution for property lost by 77 immigrant miners. Drawing on JDR, Jr.'s earlier directive that CF&I was to "provide fully" for any employees or their families injured in the disturbance, Lee pointed out that none of the consul's constituents were CF&I employees (Lee, 1915k, 1915l, 1915m, 1915n, 1915o; van Fischer-Ankern, 1915; Welborn, 1915j). Lee also tactfully fielded still other suggestions from outside experts and others who wanted to help (Welborn, 1915k).

When CF&I President Welborn came to New York in late February 1915, Lee participated in a series of high-level meetings. Rockefeller reviewed for Welborn his conversations with the various union leaders and admonished the CF&I executive that there must never be another strike in the mines. Based on his two visits to the state, Lee was particularly vocal about the exploitation of workers by company stores (Landin, 1915). Rockefeller and Lee both asked whether some kind of profit-sharing plan might be implemented—an idea that Welborn eventually warmed up to as it was discussed (Mackenzie King, 1973, pp. 215, 230).

The several days of talks ranged over the full gamut of needed reforms. As he had testified he planned to do, Rockefeller reminded the group that he fully intended to visit Colorado and to take Lee with him. The group also decided that Mackenzie King should go to Colorado in advance of JDR, Jr.'s trip. Mackenzie King discussed the idea with Lee, who thought it was a first-rate idea as long as the public did not perceive that his investigation was in any way connected with the upcoming trip (Mackenzie King, 1973, pp. 236, 241).

On Saturday, February 27, the group—Rockefeller, Welborn, Murphy, Mackenzie King, and Lee—held an informal meeting with the members of the Low Commission (Mackenzie King, 1973, pp. 242–245). Lee was no stranger to Seth Low. Upon leaving newspaper work in 1908, Lee’s first job had been to write a 160-page book for Low’s campaign when he ran for mayor of New York on a reform platform (Hiebert, 1966a, p. 38). In light of the rebuke from the other operators, the commissioners asked the group’s advice about its own plans to go to Colorado. Later, on March 29, Lee met with Low to review the commission’s draft interim report to the president, and made several substantive suggestions, including the inclusion of Rockefeller’s name. In an effort to assuage labor leaders, Lee suggested that Low show the report to UMWA officials (Mackenzie King, 1973, p. 287).

Following the meeting, Lee reversed his opinion about the wisdom of Mackenzie King’s going to Colorado. Lee wanted to avoid any public impression that Rockefeller had persuaded government officials to delay their study trip in order to give his consultant more time (Mackenzie King, 1973, pp. 287–288). Nevertheless, Mackenzie King left for Denver soon thereafter. Lee suggested several people for Mackenzie King to see, and arranged at least one introduction (Mackenzie King, 1973, p. 434).

Lee devoted considerable time during the first half of 1915 to government relations. Besides the Low Commission, Lee was besieged following the release on March 3 of a U.S. House Committee on Mines and Mining report produced under the auspices of Rep. Martin Foster. The *St. Louis Globe-Democrat*, for example, editorialized that the committee had far overreached its mandate by launching into a general discussion of relations between capital and labor and by singling out Rockefeller as an individual (The Colorado strike report, 1915; see also Congressional majority report on industrial disturbances in Colorado a curiosity, 1915).

Lee’s time also continued to be taken up by the USCIR’s ongoing inquiry. Part of this responsibility involved providing answers to follow-up questions. Lee also reviewed and corrected transcripts of the hearings, and responded to requests. In a flurry of letters, Lee was asked by the USCIR staff to provide copies of yet additional letters and telegrams that he had exchanged with Rockefeller and CF&I officials in the course of his work the prior year (Brown, 1915a, 1915b; Lee, 1915p, 1915q, 1915r, 1915s).²⁰

In March, Lee proposed that the answers to the three questionnaires submitted to the USCIR be reprinted, along with the substantive portions of the testimony

²⁰As early as March 25, Lee had heard that the fate of the USCIR was in trouble. Lee wrote JDR, Jr., a memo accompanied by a confidential report that he had obtained from sources at the Pennsylvania Railroad. Congress had not appropriated funds to extend the work of the Commission beyond August. The commission would hold hearings in Chicago, but was forced to cancel hearings in Pittsburgh (Lee, 1915t).

given by various witnesses, concerning the role of the Rockefeller Foundation. He recommended that copies be distributed to every public, college, and newspaper library and to people prominent in public life (Lee, 1915u). Separately, he recommended preparation of a legal brief, which could be filed with the USCIR, given to the press, and distributed as part of the book containing the USCIR questionnaires and testimony. Lee contended that the brief should be written in popular language, without legal phraseology. General Counsel Starr recommended that Lee proceed on the first suggestion at once (Lee, 1915v). No evidence suggests that the second recommendation was ever adopted.²¹

OTHER PUBLICITY ACTIVITIES IN 1915

Overall, Lee devoted only a small portion of his time to media relations during 1915. Lee found himself riding herd over a wide range of journalists doing stories about the testimony, but he issued only a few press statements. In one early case, for example, he asked CF&I President Welborn to recommend a Colorado journalist who might be interested in doing a freelance article for the *Unpopular Review* (Lee, 1915x). Lee also coordinated with Mackenzie King the distribution of an important telegram to the Trinidad Chamber of Commerce in Colorado, and a subsequent press announcement that the Rockefeller Foundation had pledged \$100,000 toward social improvements through a program to create work for displaced Colorado workers (Mackenzie King, 1973, pp. 286, 310). Lee helped arrange at least one journalist's visit to Colorado, and enlisted Welborn's assistance (Welborn, 1915m). An array of newspaper clippings exchanged hands between Welborn and Lee (Welborn, 1915n, 1915o, 1915p, 1915q) and countless others were undoubtedly circulated among the New York staff. In perhaps his most unusual action, Lee attempted to ascertain details of plans for a new newspaper in Denver, which would have as its backer the former CF&I Chairman Bowers (Lee, 1915y; Welborn, 1915r).²²

Lee's knack for nurturing the confidences of media personnel was evident in an extensive memo, apparently written at Lee's request, by S. J. Dunleavy, a former *Rocky Mountain News* editorial writer. Dunleavy had moved to New York for his

²¹Not all of Lee's duties while on the Rockefeller staff were related to the strike. He performed some routine duties, such as serving as intermediary between CF&I and representatives of the Railway Business Association (which wanted CF&I to become a member; Lee, 1915c). Similarly, Lee received and later, after consultation with Welborn, responded to a young man who sought a position in CF&I's engineering department (Lee, 1915w; Welborn, 1915l).

²²Although Lee said he was making the inquiry for a friend, Lamont M. Bowers, the deposed CF&I chairman, had sent Rockefeller a clipping from an unidentified newspaper. The clip stated that a new newspaper was to be started in Denver, and occupy the abandoned facilities of the *Denver Times*, which had been sold to the *Rocky Mountain News*. The clipping stated that the *Denver American* was to be controlled by Rockefeller and run by Bowers—a fact that Bowers did not address in any way in his letter (Bowers, 1915).

wife's health and so worked in a comparable position at the *New York World*. The reporter detailed in 10 double-spaced pages his views on the political, social, and economic contributors to the situation in Colorado and made various suggestions (Dunleavy, 1915). Lee undoubtedly used this memo to push Rockefeller on the need for reforms. JDR, Jr., would later write Welborn that criticisms outlined in the memo should never be allowed to occur again (Rockefeller, 1915d).

Although Lee generally advocated openness and cheerful assistance in press relations, client imperatives sometimes prevented him from following his own advice. In one instance, Lee essentially stonewalled Paul A. Kellogg, editor of *The Survey*, an influential publication in the social welfare arena. Kellogg wanted a response from the Rockefellers to a proposed article from a witness in the USCIR hearings who had been critical of the Rockefeller Foundation. After an exchange of letters between the magazine and the Rockefellers' attorneys (Kellogg, 1915a, 1915b, 1915c; Murphy, 1915a), Lee sent Kellogg a confidential set of background materials, saying Kellogg was free to use the facts, but could not identify the source. "In case you may make any publication on the subject, simply point out that we decline to comment ... to enter into any controversy with him" (Kellogg, 1915d; Lee, 1915z).

A trickier problem followed several weeks later, when union local leader John Lawson was convicted and given a lifetime prison term for a murder that occurred during the strike. Critics charged that the attorney representing CF&I had meddled in the prosecution. Welborn denied the charge in a statement that was published in Colorado newspapers on April 23 (Had no part in trial of men, 1915). Lee's possible involvement in the development of Welborn's statement is not certain. However, when the Lawson conviction was announced on May 3, Lee and Welborn exchanged a battery of telegrams that compared newspaper coverage in New York and Colorado (Lee, 1915aa; Welborn, 1915s, 1915t, 1915u). The two men were particularly concerned about the revelation that the trial judge had received an anonymous letter the prior week. The sender threatened to kill "all coal company officials from Rockefeller down" if Lawson were convicted. Separately, Lee made a long-distance telephone call to Welborn to say that the Eastern press carried a long statement from Lawson's attorney charging that the union official's conviction was the result of Rockefeller's influence. Lee drafted two statements, but neither was ever used. One statement reiterated that the Rockefeller interests played no part in the trial (1915bb). A second statement was directed to the UMWA and criticized its attorney's comments. After extended discussion in Denver that involved Welborn and King, it was decided that Lee's claims could not be substantiated unequivocally (Mackenzie King, 1973, pp. 626-627).

MAY 1915 COMMISSION HEARINGS

The Rockefeller group would again be called as witnesses in the third round of USCIR hearings on the Colorado strike. The hearings took place this time in

Washington, DC, in May. Rockefeller, Lee, and Mackenzie King were among the witnesses called in this round, which took place against a politically charged backdrop. Basil M. Manly, the commission's new research director, had revealed the commission's motive when he wrote Walsh, "I am not sure that the papers are not tired of Bowers, Mackenzie King and Lee, but Rockefeller is, of course, always front page news" (McGovern and Guttridge, 1972/1996, p. 325; Manly, 1915).

On April 23, Walsh held a press conference in Kansas City, where he publicly refuted Rockefeller's earlier testimony that JDR, Jr., was not directly involved in the strike. Instead, quoting extensively from recently subpoenaed letters, obtained through Lee, Walsh contended that Rockefeller was involved in the entire strategy, and had attempted to influence the statehouse at Denver through Lee's letter for Boughton. On April 25, Lee issued a one-page, conciliatory statement. But this response was followed the following day with a blistering five-page statement that blasted specific claims made by Walsh (Office of Messrs. Rockefeller, 1915c, 1915d; see also Mr. Walsh at People's Power League, 1915).

More than in January, the hearings in May proved to be an ordeal. Rockefeller himself was under considerable personal strain at the time, following the deaths of his mother and his father-in-law in the prior 2 months and the cancellation of his planned trip to Colorado. Meanwhile, the Rockefeller staff again labored to prepare testimony. Lee circulated a first draft to Welborn, and probably others, as early as April 30 (Lee, 1915cc).

Both Lee's press statement and testimony written for Rockefeller drew on correspondence to refute Walsh's claims. The focus was to outline a list of the 10 specific "suggestions" that Rockefeller's office had given to the Denver management. Rockefeller also addressed charges of price manipulation and intervention in the Lawson trial and the plans to rectify labor conditions. Using hard-hitting language intended to deflate the sails of a belligerent Chairman Walsh, Lee included an appendix that addressed other criticisms. These included the attack on the Boughton letter, the claim that Rockefeller had withheld information from the Secretary of Labor, the rumor that Rockefeller planned to operate a string of daily newspapers and to finance the official house organ of the U.S. Chamber of Commerce, and the Rockefellers' alleged indifference to the suffering in Colorado. Lee produced the testimony as a press statement for release on the day of the event (Rockefeller, 1915e) and later as a booklet (Rockefeller, 1915f).

Lee knew that the Rockefellers were in for a bitter fight. Based on Walsh's attack, and knowing that the documents would eventually be published in the Commission's report, Lee had recommended as early as May 5 that the Rockefellers publish all the documents and JDR, Jr.'s testimony in booklet form. Lee wanted the public to be able to judge for itself who was telling the truth. This suggestion

received resistance from Murphy, Heydt, and Mackenzie King (1973, p. 627).²³ Eventually only 50 proof sets of the multivolume series containing all of the testimony of key company officials from the Denver, New York, and Washington hearings were produced (Lee, 1915dd).

Lee's work again was in the limelight during the May hearings. JDR, Jr., was drilled about origins of the project and Lee's role in the effort. JDR, Jr., repeated the fact that the work was conducted on behalf of the operators and that Lee never "issued" the bulletins. Walsh read a June 11 letter that Lee had written to JDR and enclosed a speech outlining Lee's ideas about human psychology (Lee, 1914g; see also Ewen, 1996). He asked whether JDR remembered and agreed with points related to Lee's views on human psychology (USCIR, 1916, vol. 9, p. 8631). Walsh also engaged in a long interrogation regarding Rockefeller's views about a May 1914 article by Professor John J. Stevenson in *Popular Science Monthly* on the problems of "Labor and Capital." JDR, Jr., had sent it to Lee as an idea for the campaign (Rockefeller, 1914s). Walsh proceeded to read carefully chosen excerpts, which made Rockefeller appear to be unsympathetic to labor and the labor class.

When Walsh asked if Lee had written his testimony, Rockefeller curtly answered that the answer was not pertinent. Not giving up, Walsh later asked whether Lee had also written news interviews and statements in the testimony, particularly one concerning JDR, Jr.'s attitude toward labor (USCIR, 1916, vol. 9, pp. 8626, 8702). Rockefeller defended Lee, saying, "You are trying to make it appear that Mr. Lee had attempted to do something wrong and that I sanctioned it" (USCIR, 1916, vol. 9, p. 8633).

Lee's second turn on the stand was comparatively brief—there was hardly anything that Walsh had not already covered with Rockefeller. Many of the questions posed to Lee were recast from the January hearing. Walsh blasted Lee nonetheless: "As a matter of fact, now, Mr. Lee, didn't you simply go to work for Mr. Rockefeller to do anything he wanted you to do—that is, properly—in a publicity way." Lee never directly responded (USCIR, 1916, vol. 9, p. 8728).

HELPING REFINE THE COLORADO INDUSTRIAL PLAN

During Summer 1915, Lee was largely involved in producing the testimony transcript booklets. Following the near circus-like environment created by Chairman Walsh at the May hearings, the credibility of the USCIR waned. The inflammatory

²³King was in Ottawa during most of the preparations for the May hearings, but continued to be involved through correspondence and telegrams, although not as extensively as he had been in the January hearings. If he had been present, his diaries might have provided additional useful insight concerning the preparations.

coverage also diminished dramatically as the American public became bored of the controversy.²⁴

Lee's other noteworthy activity during this period involved drafting a letter on behalf of the operators to the Colorado Attorney General to urge disposal of the 450 or so pending indictments, many of which were of questionable merit. The operator's goals were simple: to reduce needless tensions and to get the negative news off the front pages to restore peace. After discovering the task was nearly impossible, Lee suggested preparation of a position statement that could be sent by Rockefeller to the Low Commission. However, Low was averse to the idea, because it would require his group to go to Colorado immediately to take up the matter (Mackenzie King, 1915, p. 680). The draft was never used (Lee, 1915e). Later, on October 7, Lee would issue a press statement expressing Rockefeller's pleasure on hearing the news that Lawson had been released on \$3,500 bail, pending a retrial in which Lawson eventually was acquitted (Office of Messrs. Rockefeller, 1915e).

With the arrival of fall, the Rockefeller staff turned its attention toward putting into place permanent policies and procedures to improve relations with the miners. Lee took an active role in these discussions. First, the staff considered the hiring of Clarence J. Hicks as executive assistant to CF&I President Welborn. Hicks would eventually manage a comprehensive employee relations program that included grievance procedures and revamped social services programs (Hicks, 1941). Lee had actually served as the inspiration for Welborn to hire an executive assistant of this kind.²⁵

During the same 4 days of meetings in September, Lee helped forge details of what would later be called the Colorado Industrial Plan, or the Rockefeller Plan. Mackenzie King had prepared the initial draft during the summer, and forwarded the proposal to Rockefeller, who reviewed it extensively with Lee and Murphy (Mackenzie King, 1973, p. 682). The CIP called for a company union, which

²⁴Lee personally received mail from citizens who were disgusted with Walsh. One anonymous woman from Kansas City consoled Lee that Walsh was a "man to be ignored" and expressed hope that "something will be done to check him! I abhor injustice!" (A widow, 1915). Later, the manager of the Pennsylvania Railroad's telegraph department wrote Lee to say he had heard "the Rockefellers had put Walsh at the head of the Kansas City Star." He wanted to know if the intent was to keep Walsh away from Washington (Johnson, 1915).

²⁵Lee had encouraged Welborn to seek a person to handle publicity, particularly in light of CF&I's role as an important institution in Colorado. He counseled Welborn that CF&I "ought to be a most active force for good in every line." He added, "It is evident that when this present trouble is over, your Company will enter on a new era and there will be many avenues of activity opened up which perhaps have not been traveled very energetically before." Lee envisioned this assistant to the president as being of value in larger matters, as well as routine work in the office, such as correspondence and interviewing callers. He noted that "my advisory services will always be at your disposal, and I shall avail myself of the opportunity to make any suggestions which may from time to time occur to me" (Lee, 1914gg).

would not be subject to collective bargaining. The plan would serve the CF&I for 2 decades until the Wagner Act of 1935 guaranteed American labor the right to collective bargaining.

Lee thought it would be preferable for the Colorado company, if necessary, to make an agreement with the UMWA rather than allow the continuation of a fight (Mackenzie King, 1973, p. 710). However, Lee fully supported Mackenzie King's compromise plan, which included an extensive mechanism for promoting upward communication and grievance resolution. Lee believed it necessary to address the miner's labor grievances before implementing any of the social services programs also under discussion—including the construction of new schools, churches, hospitals, and clubs (Mackenzie King, 1973, p. 710). Among Lee's specific recommendations were inclusion of language pertaining to freedom of meeting and a schedule of wages and working conditions. Lee was the one who suggested that the proposal be in the form of an agreement between the employees and the company. All of Lee's suggestions were readily welcomed by the plan's author (Mackenzie King, 1973, pp. 712–713).

ROCKEFELLER'S COLORADO TRIP

To sell the plan, Rockefeller resurrected his postponed trip to Colorado, which was now planned for late September and early October. Lee had suggested that Rockefeller go to Colorado (Lee, 1925, p. 12).²⁶ After all, JDR, Jr., had not been in the state for a dozen years. While ostensibly a study excursion, a secondary purpose of Mackenzie King's trip in March had been to pave the way.

Although originally scheduled to accompany Rockefeller, Lee did not go on the Colorado trip—a fact that disappointed Welborn (1915v). Rockefeller was accompanied only by his secretary, Charles O. Heydt, who compiled a detailed 63-page record of the trip (Heydt, 1915). The two New Yorkers were met in Denver by Mackenzie King and his personal secretary, Fred A. McGregor. Local officials escorted the four men through the southern Colorado mine district for 10 days, although Mackenzie King was already familiar with territory and did a good bit of shepherding. Rockefeller also sojourned to CF&I's mine in Sunrise, Wyoming, after which he also met Colorado Governor George A. Carlson. Rockefeller gave extemporaneous pep talks to miners in each community, as well as two major addresses—before the CF&I employees in Pueblo and the Denver Chamber of

²⁶It is not certain that Lee was the first person to make the suggestion (see Beckwith, 1964, p. 71). Welborn and King undoubtedly encouraged him to see the situation for himself. JDR, Jr., made his first public commitment to the trip at the USCIR testimony in January 1915. His original plan to go immediately on the heels of King's March 1915 visit was delayed by family deaths and the May 1915 USCIR hearings.

Commerce. Lee was undoubtedly involved in preparation of Rockefeller's major talks, which were subsequently reprinted in a booklet on the Industrial Plan produced the following year (Rockefeller, 1916a) and later in a vanity press book produced by Lee (Rockefeller, 1923).

Lee's involvement in planning details of the trip are less clear—despite claims that JDR, Jr.'s trip was Lee's greatest triumph (e.g., Ballinger, 1994). One story goes that Lee suggested Rockefeller and King don miner's outfits before going down into the mineshafts (Chernow, 1998, p. 588). However, general counsel Starr J. Murphy had worn a similar miner's uniform on his trip in June. Local company officials later sent Murphy a new, sharply pressed miner's outfit, sold in the company stores for \$2 (Murphy, 1915b). Also, eight reporters accompanied JDR, Jr., and Mackenzie King on their tour—six from Colorado and two representing newspapers in Chicago and New York. Because of Lee's limited contact with the Colorado press, it is quite probable that arrangements to accompany JDR, Jr., were coordinated by Welborn, who had cultivated close contacts with the press by this time. However, Lee undoubtedly was able to follow details because the New York newspapers carried daily dispatches.

FINAL COLORADO ACTIVITIES

During the last months of 1915, evidence suggests that Lee helped recruit directors for the CF&I board. In fact, his only extant correspondence with Rockefeller from the period during the trip outlined suggestions and sought direction from JDR, Jr., about several potential candidates (Lee, 1915ff; Rockefeller, 1915g).²⁷ Later, Lee consulted with Rockefeller to formulate a strategy for CF&I to increase production of its barbed wire and steel rail products (Rockefeller, 1915h, 1915i). Lee also began preparations to distribute a half million copies of the booklet outlining the Colorado Industrial Plan to a broad range of opinion leaders (Lee, 1915hh).

Lee's last major publicity initiative, while on the staff, involved spearheading preparation of a 6,500-word article on "Labor and Capital," which had been requested by Ellery Sedgwick, the editor of *Atlantic Monthly*, in the wake of Rockefeller's widely publicized trip to Colorado (Sedgwick, 1915). Lee traveled to Hot Springs, West Virginia, where Rockefeller was vacationing, to work on the initial draft. However, Rockefeller did not rely on Lee exclusively for advice or editorial assistance. Instead, he also engaged in a 10-day round of revisions that also involved Mackenzie King and Murphy. Lee worked separately with Mackenzie King, who submitted various changes referred to as their "united advice" (Mackenzie King, 1915). By contrast, Murphy also forwarded their collaborative rec-

²⁷This was not Lee's first involvement in the recruitment of board members. In April 1915, Lee corresponded with George Gould to inquire about the possible appointment of Edwin Gould (Lee, 1915ee).

ommendations, but freely disagreed with several of Lee's specific points (Murphy, 1915c). Although Rockefeller would later write Lee to express "my satisfaction with the paper and my appreciation of the valuable cooperation which you and Mr. Murphy have rendered in its preparation" (Rockefeller, 1915j), Rockefeller directed Murphy—not Lee—to compile the very last changes and submit it to the publication (Rockefeller, 1915k, 1915l). The effect of the Colorado trip publicity, the booklets, the *Atlantic Monthly* (Rockefeller, 1916b), and other articles (e.g., Rockefeller, 1916c) was to position Rockefeller as a leading proponent of industrial relations.

Lee's absence from finalizing the *Atlantic Monthly* article can be explained by his third and final trip to Colorado for the Rockefellers. Lee went to Colorado in mid-November 1915 to discuss publicity and other matters. Lee consulted with Hicks, Welborn, and Mackenzie King, who was in Denver to work with Welborn on the extension of the Industrial Representation Plan to CF&I's large steel mill on Pueblo. Lee advised on plans for a new employee publication, the *CF&I Industrial Bulletin*, which was going to be produced under Hick's direction, as well as the issuance of other publications.

LEE RETURNS TO COUNSELOR ROLE

Lee worked for Rockefeller for 7 months in 1914 as a consultant and 15 months as a staff member in 1915 and early 1916. On April 1, 1916, Lee left Rockefeller's staff to open his publicity agency with his brother, J. Wideman Lee, and W. W. Harris. He had negotiated to continue to work for the Rockefellers, but quickly signed on other clients. He allegedly told Rockefeller, Sr., that he was not motivated by financial gain,²⁸ although Lee would eventually earn far more than he did as a Rockefeller staff member.²⁹ He explained that "I'll never be entirely dependent on anyone, and will be in a position to give advice no matter how unpalatable." He expressed similar sentiments in a letter to his father (Lee, 1916b).³⁰ Indeed, Lee wrote Rockefeller on April 6 to thank him for JDR, Jr.'s generosity for continuing the employment of his former secretary, N. W. Dengler, Jr. "Incidentally, I haven't said anything about leaving you, because I do not look on it as leaving. You may be sure that your interests do and shall occupy a very large portion of my own attention" (Lee, 1916c). Rockefeller re-

²⁸This story is recounted by Hiebert (1966a, p. 117) based on a Merryle S. Rukeyser column distributed by International News Service.

²⁹Upton Sinclair (1923) would later chide Lee for his success in being able to purchase an apartment at 4 East 66th Street, a few blocks off Fifth Avenue. According to Sinclair, the cheapest apartment rented for \$25,000 a year.

³⁰Indeed, T. J. Ross, second in command at Ivy Lee & Associates, and Lee's eventual business partner, later said that Lee had been increasingly called on by other business leaders as an advisor on a variety of business activities (T. J. Ross, quoted in Berlin, 1947, p. 91). Lee made a similar comment in his initial negotiation letter to Rockefeller (Lee, 1914bb).

plied, apologizing “that I have not had a chance to either see you or communicate with you since you moved your office” (Rockefeller 1916d).

Lee’s decision to leave Rockefeller’s staff was probably grounded in frustration. Although Rockefeller relied on Lee, and obviously came to respect his views, JDR, Jr., sought advice from Greene and Murphy and developed a particularly strong personal relationship with Mackenzie King. With increased frequency, others challenged Lee’s advice. Evidence points to an emerging lack of confidence in Lee among the staff over the summer of 1915, despite Lee’s active role in helping refine the Industrial Plan. On September 13, Lee talked to Mackenzie King about the great difficulty he was having getting anything done in the office, and Mackenzie King surmised that much of his publicity work had been stopped (Mackenzie King, 1973, p. 740; Hallahan, in preparation). These events—coupled with the scrambling that took place in preparation of the *Atlantic Monthly* article and the resistance Lee encountered on his third visit to Colorado compared to his warm welcome a year earlier (Lee, 1914n; Mackenzie King, 1973, pp. 772–773)—suggest that Lee might have been too strong in expressing his views about the importance of publicity, or his recommendations for openness simply did not square with those of the others. Although no other personal writings of Lee exist to support such a conclusion, he appears to have been frustrated by a lack of power as a staff member—an efficacy he would regain as a consultant (Hallahan, in preparation).

DISCUSSION

By detailing Ivy Lee’s work for the Rockefellers in 1914 and 1915, this study goes beyond the available histories to shed light on what many consider to be a milestone in the early development of modern public relations. This study looks beyond the traditional focus of historians on Lee’s bulletins to suggest that Lee was involved in a broad and rich range of communication and counseling activities. The details presented also offer insights into the tactics used during the period, when publicity work largely depended on using newspapers and magazines as well as direct communications with opinion leaders. Finally, this study presents a rare glimpse at the interaction with a practitioner and two client contacts involved in the same project (Miller, 2000).

Ivy Lee has been heralded as the father of modern public relations; he was named the outstanding professional in history on several polls (Burson hailed as PR’s no. 1 influential figure, 1999; Lewis, 1970; Top ten names in corporate PR, 1979). Clearly, the ideals that he espoused in his famous Declaration of Principles of 1906 signaled a move away from pure press-agentry. He helped forge a model of public relations based on the dissemination of factual and timely information given gladly to the press and public (Goldman, 1948; J. E. Grunig & Hunt, 1984; Image maker for PR, 1963; Ross, 1959). Yet, Lee also was important in the devel-

opment of public relations because he also envisioned a quite different approach to how companies dealt with the public—a precursor to more enlightened views. His enlightened thinking is no better evident than in the closing sentences of the last bulletin he wrote for CF&I:

The strike has been productive of great bitterness and misunderstanding. It is hoped that under the calmer conditions now to be expected that the friendliness and harmonious relations heretofore existing between the companies and the men will further develop. No company can succeed permanently which does not deserve and receive the confidence of both its own employees and the public. It is the policy of the management of the Colorado Fuel & Iron Company to command this confidence. (The struggle in Colorado for industrial freedom, 1914–1915, Bulletin II-4, “The strike ends,” p. 2)

In writing these words, Lee no doubt helped CF&I institutionalize a more enlightened management approach to labor relations. Thus his words helped make this commitment a self-fulfilling prophecy, at least in terms of his Colorado-related work. Lee’s biographers might sell Lee short when they suggest that Lee did less to change the Rockefellers’ policies than to give them a public hearing (Hiebert, 1964, p. 9). Alternatively, critics suggest that Lee played a policy role in only relatively minor matters and did little to liberalize or reform his clients’ policies (Tedlow, 1979, p. 37). The evidence presented here about Lee’s counseling role certainly challenges those conclusions and is more consistent with Gras, who suggested that Lee both was interested in publicity and had a “sound notion of business policy which must underlie any successful publicity” (Gras, 1945, p. 128).

Lee’s counseling role, while not as prominent as his publicity work, served as an experiment in his vision of the greater role of public relations. In 1916, the year he left Rockefeller’s staff to return to private practice, Lee told an industry audience,

Publicity, in its ultimate sense, means the actual relationship of a company to the people, and that relationship involves far more than *saying*—it involves *doing*. An *elementary requisite* of any sound publicity must be, therefore, the giving of the best possible service. (Lee, 1916a, p. 48, italics in original; also cited in Goldman, 1948; and Ross, 1959)

Cutlip (1995) observes that this is the essence of today’s mature public relations concept. Beckwith (1964, p. 67) pointed to Lee’s quick rise in less than a year to directorships in three Rockefeller enterprises as evidence that Lee’s influence extended beyond mere publicity. Similarly, Gras (1945, pp. 133–134) suggests that Lee’s work with the Pennsylvania Railroad, and later with the Rockefellers,

marked an important second step in the evolution of public relations—when publicity professionals served as close advisers to chief executives.³¹

Lee's Contribution to the Colorado Situation

In recognizing Lee's important counseling role, it also is important to avoid attributing credit to Lee goals or strategies that were not necessarily his alone. The response to the Colorado problem was very much a collective effort. Much of the credit for the enlightened response must be given to JDR, Jr., who following his graduation from Brown University in 1897 went to work in his father's office to help manage the family's business affairs and growing philanthropic activity. (Rockefeller, Sr., had actually stepped down from active involvement at Standard Oil the previous year.) While the Rockefeller staff was housed in the same building, JDR, Jr., was removed from direct management at Standard Oil and avoided any contact with details of the oil business (Clarke, 1925). JDR, Jr., was a sensitive and incisive man—quite unlike his crusty, competitive father, although he was fiercely loyal to and followed his father's advice.

It was JDR, Jr., who ultimately recognized the need for action—both to address negative public opinion and to intervene in the employee relations of the company, which the Rockefellers—like all their other enterprises—left to the stewardship of local management. Simultaneously with hiring Lee, JDR, Jr., retained William Lyon Mackenzie King, the former labor minister of Canada, who would play an influential role in advising JDR on how to reconcile CF&I's labor problems. Lee and Mackenzie King agreed philosophically on the need for two-way communication, but differed on various points as to how Rockefeller should handle his dealings with government officials and the press. While Lee focused on public communications, it was Mackenzie King who ultimately had the greater influence on employee relations (Hallahan, in preparation).

To his credit, Lee was an individual of character, who believed in the decency of humanity and had faith in the ability of people to think rationally and discern truth when given the necessary facts. In part, this reflects his upbringing and liberal arts education. Lee, like other publicists during the Progressive era, depended on factuality—the reliance on strong persuasive and rational arguments.³² Yet the mere

³¹Gras (1945) suggested that public relations has evolved through five steps: (a) recognition of its importance by organizations (typified by Thomas Vail), (b) appointment of assistants to chief executive responsible for publicity, (c) appointment of vice presidents to take charge of the public relations function, (d) the emergence of public relations departments, and (e) emergence of public relations as an all-round research organization involved in formulation of new company policies.

³²Lee depended on the logic of the written word, rather than emotion or graphical devices that would be introduced later (Ewen, 1996, p. 76). In this regard, Huebner (1979, p. 106) pointed out that publicists of the era were not much different from the muckrakers, who primarily saw themselves as *informers*—not leaders, revivalists, or agitators. Indeed, publicity was a cornerstone of many Progressive reforms (see also Gitelman, 1988, p. 35).

dissemination of facts does not constitute effective communication. Little evidence, other than the political flap created later by his critics, provides much evidence as to the impact that his bulletins had on mainstream public opinion. Yet, unlike crisis or issues management today, the main thrust of his efforts came a full 2 months after the triggering event, when general public awareness began to wane. At best, anecdotal evidence suggests that other business people, community leaders in Colorado, and clergy who were already predisposed to the company's position were the ones to request copies of the bulletins. Indeed, Lee's publicity audience constituted America's middle class (Ewen, 1978, p. 78), while his government relations efforts were directed to people in positions of power.

Criticisms of Lee's Work: The Problems of Inaccuracies

Lee's work in 1914–1915 was riddled with controversy.³³ Historian George McGovern, for example, states, "Adding Ivy Lee to the payroll augured no great improvement, since the publicist's function was to receive the same biased or inaccurate information that Rockefeller had been getting" (McGovern and Guttridge, 1972/1996, p. 289). Concerning Lee's suggestion that leaflets be placed in miners' homes, he added, "It must have been this sort of private counsel from Lee that Rockefeller believed to be something special. No one paying the publicist \$1,000 a month for the *Facts* [bulletins] could have thought he was getting his money's worth" (McGovern and Guttridge, 1972/1996, p. 291). Elsewhere McGovern compared Lee's work to a "snow job on behalf of the coal operators." More generously, McGovern explained, "It was the first time in any American labor struggle where you had an organized effort to use what has become modern public relations to sell one side of the strike to the American people" (McGovern, quoted in "The Image Makers," Corporation for Entertainment and Learning/BDM, 1984).

The problem of inaccuracies in Lee's bulletins has been the central question in most critiques of Lee's work in Colorado. Generally, theorizing falls into two arenas. The *deception thesis* suggests that Lee's work had the effect of misleading the public. Even Lee's largely uncritical biographer observes, "Most of the bulletins contained matter which on the surface was true, but which presented the facts in a way as to give a total picture that was false" (Hiebert, 1966a, p. 101). Although Hiebert fell short of accusing Lee of deliberate deception, Olasky (1987a,b) contended Lee's Declaration of Principles were artfully concocted to deceive news people and others about Lee's actual practices by advocating an approach that would

³³Controversy accompanied Lee throughout his career. His work for the railroads previously had triggered a diatribe in Congress (see Hiebert, 1966a, chapters 7–8). Lee would be criticized later in his career in connection with his advocacy of better relations with Russia and his firm's work for the German Dye Trust at the time Hitler rose to power (Hainsworth, 1987; Hiebert, 1966a).

resonate well with Progressive era ideals, but served to obfuscate Lee's motives and actions.

Other researchers, beginning with Atwater (1967; see also Lyon, 1968), have advanced what might be termed the *contradiction thesis*; that is, there was a gap between Lee's espoused tenets of public relations, as articulated in his Declaration of Principles of 1906 and his other writings (Lee, n.d.), and his actions in handling CF&I's work. No assumption of deliberate deception is assumed, but scholars have called Lee to task on normative grounds. Atwater (1967) contended that contradictions in Lee's behavior were rooted in his personal ambition—Lee's desire for status, rich fees, a high standard of living, power, and prestige. According to Atwater, "As a publicity man with big business men as clients, his own personal success depended on their approval of his work. His theory of values took precedent over his theories." Atwater added, "His principles established sound standards for the publicist. Unfortunately, they were too stringent even for their creator" (Atwater, 1967, pp. 102–103).

In a similar vein, Tedlow (1979, p. 54, from Lee Papers, Box 6) pointed out that Lee had written in a brochure he had produced in the early 1900s, "My strength is being uniformly prepared to send to the press only such information as I can take responsibility for personally." Warren (1991) similarly pointed to the watchword of the Parker & Lee agency, which promoted itself on the tenets of "accuracy, authenticity, interest" (reviewed in Hiebert, 1966a, p. 49). Warren systematically compares the claims made in the Series I bulletins to information culled from other contemporary sources. McGovern and Guttridge (1972/1996, p. 290) noted that, although Lee "boasted of being concerned only with facts, he let a number of blunders or deceptions slip by him."

This study suggests considerable support for the *contraction thesis*, but makes no attempt to defend or pass judgment on Lee's actions. However, students of public relations history must examine Lee's work given the difficult circumstances in which he worked. First, it is ironic that this milestone event in public relations was undertaken as a moonlighting assignment while Lee carried out the duties of his full-time job. This might explain, for example, his reliance on his brother-in-law and the input of the clients in the early stages of the project. But after his visit to Colorado, Lee was able to exercise much greater judgment. Was he wrong in accepting the assignment on a part-time basis? Probably not. Most practitioners undoubtedly would be flattered to be called on by one of the nation's scions to help resolve a problem perceived by the business community as having wide-reaching implications: improving labor relations.

Second, it is easy to overlook the influence of sheer physical distance in Lee's decision-making. Although Lee had free railway passes to many destinations, his clients were split between New York and Denver. And, it was largely the physical distances between the mine district and Denver, and between Denver and New York, that led to many of the problems in the first place. The physical distance was a major handicap that has been largely overlooked by critics writing today when

real-time communications are second nature. Lee had to rely on correspondence, telegram messages, and occasionally telephone conversations to exchange information. Lee's lack of knowledge of the Colorado culture, and the influence of the frontier mentality on management and labor practices, undoubtedly led him to accept at face value information that was not completely accurate, or that he was not in a position to evaluate critically.

Third, Lee was operating in a highly emotion-charged environment. Indeed the Colorado strike was one of the first classic examples of crisis and issues management. This emotion might have dichotomized the thinking of the Colorado managers, as well as the Rockefeller staff, who became naturally defensive. In contemporary management parlance, they enacted an environment or worldview that poorly matched reality (Heath, 1997; Weick, 1969). The unrelenting pressure from union activists, coupled with support from prominent and vocal sympathizers such as Upton Sinclair and George Creel, and the unabashed partisanship of pro-labor government officials, would make the task difficult for anyone.

Given the circumstances, some might forgive Lee for errors in judgment when he took information from the Colorado managers without questioning its veracity, or possibly for not verifying the information more extensively than he did. Perhaps a more dubious practice was the fact that his entire bulletin strategy was predicated on making it appear that the bulletins were published on behalf of the operators, not the Rockefellers. But, in fact, Lee consciously considered the coal mine operators to be the client for whom his program was conducted. Welborn was the one who approved most materials, except the very first bulletin. And CF&I ultimately picked up the entire \$25,000 cost of Lee's work, exclusive of an additional \$1,000 paid for by the Rockefellers. The only real deception was that none of the bulletins clearly indicated that coal mine operators paid for the promotion, except for the outside corner card of the envelopes (USCIR, 1916, vol. 8, p. 7915). Was it a material fact for the operators to have disclosed that Ivy Lee created the campaign? No evidence suggests that anyone ever asked the question—or that Lee ever denied his arrangement. He was, however, concerned about how his involvement was revealed in the government testimony to protect his employer, the Pennsylvania Railroad. Whether Samuel Rea or other officials of the Penn Railroad knew about the problems in the bulletins is uncertain.

Lee's Work in Perspective

If historians question Lee's success, Lee was confident about his results. Although he had an obvious economic interest in merchandising his success, he wrote to Rockefeller:

I think your letters to the editors, the various bulletins, etc. are doing good. You could not expect all of the bulletins to be published, nor is to be expected that all of the edi-

tors would change their point of view, but this has been accomplished in so many cases, that the effort has certainly been worthwhile. (Lee, 1914aa)

Stories differ as to how the Rockefellers responded to Lee's work. In an interview in 1967, Ivy Lee, Jr., told Atwater (1967, p. 57) that JDR, Sr., did not fully understand the views that his publicist–father espoused. In fact, it was not until after the Colorado episode that the Rockefellers began to formulate policies with the public in mind. Lee's son believed that JDR, Jr., hired Lee, Sr., for the wrong reason, as a publicist and not an adviser on policy. Lee, Jr., said that JDR, Jr., almost fired his father because of the lack of improvement in the situation—and only became confident in Lee after events bore out Lee's analysis that bad management was the cause of the troubles.

Alternatively, Gitelman (1988, p. 60) suggested that Messrs. Rockefeller both found Lee charming and serious and valued his counsel. In particular, JDR, Jr., was fascinated by Lee's grasp of public opinion and cordial relations with the press. In 1918, as Lee took on Standard Oil of New Jersey as a client, JDR, Jr., wrote the then-head of the company, "Mr. Lee is very much more than a publicity agent. He is one of our advisers in regard to various matters of policy" (Rockefeller, 1918; cited in Chernow, 1998, p. 584). This contradicts statements that would tend to minimize Lee's influence. Hiebert (1966a, p. 114) suggested that the fundamental decisions about Colorado were not of Lee's making (see also USCIR, 1916, vol. 9, p. 8855). Likewise, Huebner described Lee's message to clients as one of consolation, not reform (Huebner, 1979, p. 18; see also Tedlow, 1979, pp. 37–38).

Critics have tended to exaggerate Lee's influence, whereas others closer to the Rockefellers have minimized his role (Hiebert, 1966a, p. 145). With each telling, the influence of Lee in reshaping public opinion about the Rockefellers has been distorted so that Lee has become a myth-like legend (Hiebert, 1965). Similarly, summaries of the story have become riddled with inaccuracies, as authors have played loosely with the details and attributed to Lee actions that simply were not his.

For example, Lee was *not* the first publicist to work for the Rockefellers. That distinction goes to Joseph I. C. Clark, who was employed by Standard Oil and was involved in some Rockefeller publicity during his tenure from 1906 to 1913 (see Clarke, 1925; Dudley, 1952; Hiebert, 1966). Similarly, other publicists were working for large corporations, including railroads (Tedlow, 1979), and used many of the same techniques as Lee. Lee introduced no particularly new public relations techniques as part of his Colorado work, although the bulletins strategy had been adapted from his successful campaign for the railroad only a year earlier. Moreover, neither the creation of the Rockefellers' extensive program of philanthropy (which began in 1901), nor John D. Rockefeller, Sr.'s penchant for giving out nickels (later dimes) were Lee's ideas, nor were they directly related to the Colorado situation. Lee was hardly responsible for reversing the public image of

JDR, Jr. As early as 1905, following the publication of Ida Tarbell's expose, the senior Rockefeller began to redress his silence, which had led to misunderstanding, suspicion, and hatred (Nevins, 1953, vol. 2, p. 350; Hiebert, 1966b). Rockefeller, Sr., slowly allowed press people to interview him, gave some speeches, and provided his reminiscences to *World's Work* magazine, which later were reprinted in a book (J. D. Rockefeller, Sr., 1909/1933). What Lee did was *accelerate* the process—as part of a long-term engagement that might have never taken place without the acute problems in Colorado.

Ironically, it was the *notoriety* of Lee's work—not the work itself—that catapulted Lee into a position of prominence. The Colorado experience, particularly the Commission hearings, gave Americans their first glimpse into the growing importance of the emerging field of publicity and public relations. And it was this notoriety—and JDR, Jr.'s public endorsement—that allowed Ivy Lee to leverage his position into being one of the most influential men of his time. Thus, the rancor and venom directed at Lee by such people as Frank Walsh and Upton Sinclair had an effect directly *opposite* to what they had intended (Ballinger, 1994; Irwin, 1936).

Lee's late partner, T. J. Ross, provided one of the most balanced summaries of Lee's role in the episode. He explained that improvements in public opinion about the Rockefellers

came out of Mr. Rockefeller's own understanding of his problem and genuine desire to serve the public and the community in which he had built his fortune. But it was the sensible counsel of Ivy Lee, which furthered that purpose, plus the character and warm sympathy of John D. Rockefeller Jr. as he carried on the work begun by his father. (Quoted in Broughton, 1943, p. 232; also see Hiebert, 1966a, p. 146)

The fact that Lee served Rockefeller as a client for 18 years until his death in 1934 (and the successor agency continued the relationship thereafter) suggests the respect and loyalty Lee engendered from his client. Following Lee's death, Rockefeller wrote a warm letter to Mrs. Cornelia Lee that lauded her late husband for his "fundamental principles" of "sincerity, honesty and integrity." JDR, Jr., described Lee as "broad-minded, far-seeing, sound in his judgments, wise in his counsel, and through these many years one of my valued associates and advisers." Some 20 years later, Rockefeller would single out Lee's work in 1914–1915: "What he did for us in the Colorado situation and in the general situation of our family and business interest to the public thereafter was of the greatest value" (Rockefeller, 1935).

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Original manuscripts related to Lee's involvement in the Colorado coal strike were culled from three primary sources:

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Ivy Ledbetter Lee Papers, MC #85, Seeley G. Mudd Manuscript Library, Princeton University, Princeton, NJ.

Jesse F. Welborn Collection, MS#1218, Stephen J. Hart Library, Colorado Historical Society, Denver, CO.

William Lyon Mackenzie King dictated a special 779-page memoir related to his work for the Rockefellers in Colorado. The manuscript was later inserted by archivists into the typescripts of his hand-written diary at page 2,539, with his regular memoirs continuing on the following page. The page numbers provided refer to the pagination of the special diary within Mackenzie King's Diaries (1973; see also McGregor, 1962).

The U.S. Commission on Industrial Relations took testimony in December 1914 in Denver, January 1915 in New York, and May 1915 in Washington, but the transcripts of the proceedings were not published until the following year in a 10-volume, 10,000-page report that included all of its various investigations (USCIR, 1916). The USCIR also published an interim report on the Colorado strike (West, 1915).

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