

MEDICAL LIBRARY ASSOCIATION

ORAL HISTORY COMMITTEE

INTERVIEW

WITH

**T. SCOTT PLUTCHAK,
AHIP, FMLA**

AND

LYNN M. FORTNEY, FMLA

Interview conducted by Rick B. Forsman, FMLA

January 9, 2020

Edited by
Carolyn E. Lipscomb, AHIP, FMLA
Project Director
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Consent Form for Oral History Interview (2002 version)

This confirms my understanding and agreement with the Medical Library Association (MLA) concerning my participation in an oral history interview as a part of MLA's Oral History Program.

1. I agree to be interviewed by Rick Forsman
on January 9, 2020. I understand that my interview will be recorded and that a transcript and edited version of my interview will later be created. I understand that I will be given an opportunity to review and edit the edited transcript before its release.

2. I hereby grant and assign all right, title, and interest to any and all recordings and transcripts of my interview including copyright [and all rights subsumed thereunder] to MLA. I will be given a copy of the edited transcript for my personal use. I understand that the transfer of these rights to MLA confers no obligations on MLA to promote, market, or otherwise make publicly available copies of the interview.

3. One or more edited and/or condensed versions of the interview, approved by me, may be disseminated by MLA, as it deems appropriate.

4. I understand that the original, unedited recording of my interview and the original unedited transcript will be maintained in the MLA archives at the National Library of Medicine, or at such other place as MLA may reasonably designate, and may be made available to researchers who have demonstrated that they have appropriate qualifications. I further understand that the original unedited recording and/or the original unedited transcript will be made available with the following restrictions (Check one):

☒ No restrictions

☐ The following specified portions of the interview will not be made available to anyone until _____.

Lynn M. Fortney

T. Scott Plutchak

Name of Interviewee(s)

Lynn M. Fortney & T. Scott Plutchak
Signature(s)

Date January 9, 2020

Accepted by: Lynn M. Fortney
MLA EXECUTIVE DIRECTOR

Rick B. Forsman

Name of MLA Interviewer(s)

Rick B. Forsman
Signature

Date Jan. 9, 2020

Date Mar 11, 2020





Caption for photograph on preceding page:

The Bearded Pigs
Medical Library Association Annual Meeting
Hyatt Regency Chicago, Crystal Ballroom
May 2008

(Left to right): Dook (Rick Peterson), Cogman (Jeff Coghill), TomCat (Tom Richardson), TScott (Scott Plutchak), SG (Scott Garrison), Tambourine Grrl (Lynn Fortney), Russell (Roger Russell), BtheA/Bruce the Almighty (Bruce Madge)

Biographical Statement

From the perspective of different arenas of librarianship, Lynn M. Fortney, FMLA, and T. Scott Plutchak, AHIP, FMLA, shared interests in issues of scholarly communication and communicating with international audiences of librarians and publishers. Fortney worked in commerce at EBSCO Information Services, while maintaining her core identity as a medical librarian. Her *Index Medicus* Price Study was recognized as a valuable resource for multiple audiences. Plutchak directed the Lister Hill Library of the Health Sciences at the University of Alabama at Birmingham (UAB). He was both an editor himself of the *Journal of the Medical Library Association* and a leading voice in open access issues—a moderating opinion advocating for cooperation with publishers. Plutchak and Fortney also collaborated on a very different venture: the band called Bearded Pigs, a feature of library conferences and a means for informal networking.

Fortney graduated from library school at Emory and entered medical librarianship at the new branch campus of the University of Alabama medical school, the College of Community Health Sciences in Tuscaloosa, where she became director and oversaw a new library building. She was a founding member of the Alabama Health Libraries Association, which recognized her contributions to the state's profession many years later with the Lynn Fortney Librarian Award. Fortney moved to the Lister Hill Library where she became acting director before leaving to join EBSCO. There she shaped a new position, expanding greatly the company's revenue from health sciences libraries and finding opportunities to work with librarians.

Plutchak attended an innovative library school at the University of Wisconsin Oshkosh and was surprised by an interview and offer from the National Library of Medicine Associate Program. His experience at NLM and his exposure to people such as Bob Braude during a practicum at the University of Nebraska were formative, and he repaid their commitment to him during the rest of his professional career. He moved to St. Louis University, where he worked for another significant figure in his career, Judy Messerle, later succeeding her as director. At a turning point in his career, Plutchak and Fortney met, subsequently marrying at a Midcontinental Chapter meeting, and Plutchak moved to Birmingham. As Lister Hill director, he built a team of senior staff whom he gave the freedom to operate, and he made connections that facilitated incubation of university technology. His final position examined digital data management at UAB.

Both Fortney and Plutchak were elected to the Medical Library Association Board of Directors. He achieved his two key goals in MLA: to edit the *Bulletin* (later *Journal*), which he did for six years, leading its move to open access publication on PubMed Central, and to deliver the Janet Doe Lecture in 2011. After serving on the first *New England Journal of Medicine* Library Advisory Board, Plutchak encouraged the Association of Academic Health Sciences Libraries to establish the Chicago Collaborative, with representatives from publisher organizations and AAHSL working together. He followed this with his most significant effort with the Scholarly Publishing Roundtable, which led to federal guidance on making research and data publicly accessible.

**Medical Library Association Interview
with T. Scott Plutchak and Lynn M. Fortney**

[WAV recording 1]

RICK B. FORSMAN: This is an interview with Lynn M. Fortney and T. Scott Plutchak. We're sitting in Brennan's Irish Pub in Birmingham, Alabama, and yes, we really are in a pub. Today is January 9, 2020. The interviewer is Rick Forsman.

Lynn and Scott, due to the overlap in your careers, this is a fairly unique joint interview for the MLA Oral History Project. It is only the second time the project has undertaken a combined interview of this scope. Thank you for working with Carolyn Lipscomb and myself to refine the interview questions and set up a time for our dialogue. While I have both questions for you individually and some questions for the two of you, please don't hesitate to add remarks along the way as you think appropriate.

Let's begin with some personal history for each of you. To start, Lynn, tell me about where you grew up and any circumstances that set the stage for your later education and career.

LYNN M. FORTNEY: Well, my dad, who just recently died at age ninety-eight, was a command-level officer in the Air Force, so we moved around, mostly through the Midwest and the South. I lived in five places by the time I started school, and three more before I went to junior high school, and two more while I was in high school. And if nothing else, it has taught me to adapt and fit in. I had to learn that and not everybody does.

It sounds like a cliché, but I vividly remember when my mom took me for the first time to get a library card at the Lincoln, Nebraska, public library. I just thought it was so cool. From age eleven on, we lived in [quarters] on base where I was able to walk or [ride my bike] to the library [inaudible]. Everything about it I liked it. I was a library aide in my junior high school, so I learned to shelve and to mend books, which I really adored.

Then in 1966, we moved to Guam, so that was my junior and senior years of high school. There's no opportunity for any prospective colleges [visits] at that point, but my mother, whose grandmother had grown up in Grinnell, Iowa, knew about Grinnell College, and she knew it had a good reputation as a liberal arts college. What she didn't know was just exactly how liberal it actually was.

RF: A little more liberal than they might have guessed.

LF: Yes [laughter]. It was definitely more liberal than they wanted me to go to. What I had really wanted to be was an architect, so I took the career things that you take in high school. But at that time, they gave different tests to the boys than the girls, and architect was not an option on the girls' test. So I ratcheted back and looked into it a little bit more. My hobby was drawing floor plans for houses, so I realized that that's what an

interior designer does. She works with the architect, who has much more engineering than the interior designer, and she designs office spaces, and I'm saying [cheap?] because there primarily are limits, and that was an option on the test. I wanted to go to the Rhode Island School of Design for that. Well, my mom really wanted me to get a liberal arts degree, and I knew for a fact because I overheard them talking, their goal for me was to go to college and get my MRS. That's the 'Mrs.' degree, for those of you who don't know.

RF: That was the universal goal at the time.

LF: I did early admission to Grinnell because they didn't want any of my other ones, and I was accepted. So that's where we went.

Now, we came back to the United States in 1968. Remember we left in '66. The country had changed dramatically in just those two years. There was a lot going on in the '60s. And even though we had American television and newspapers when we lived in Guam, it was not as impactful as when we got back. It was like, wow, this is a different country.

They take me off to Grinnell. And when I say it was more liberal than my parents had expected, when they came for homecoming, they were quite surprised that our homecoming queen was actually a queen in the whole other sense of the word, and was parading around in his regalia. They wanted to yank me out by my hair, but somehow I prevailed. I was doing well academically, I was adjusting well, because, again, I had learned to adapt, so they let me stay.

The end of my college career comes about and I still didn't have that MRS degree, so I set to thinking about what it is I might like to do. I was an American Studies major, which is a combination of American history, literature, econ, and sociology. And there were a lot of research papers I had to write that used the library. I thought I knew everything about libraries until I really got into doing college-level research.

I started asking for the assistance of the youngest, who seemed to me to be the smartest, librarian on staff, and I was astonished at the things she would get access to. I needed some obscure piece of data for a paper I was writing, but she used the teletype machine to get me an answer. I thought, librarians are magical creatures with secret powers! I thought, oh, well, this is great. I could do the research but not have to do the writing part. That's what made me decide to go into librarianship. I talked to her a little bit more, and she helped me identify library schools and told me about the different kinds of libraries. I didn't know anything about medical libraries. Who would? I knew public libraries and I knew academic or college libraries and that was the extent of it. She told me that when she went back to visit her friends in Chicago—that she'd gone to library school there—and they would go out for beers, it was only the medical librarians who could afford two beers [laughter].

RF: Well, that's attractive.

LF: Yes. In other words, there might a little more income potential on the medical side. And I was dating a pre-med student and I had fantasies of our future together, and I thought, well, this could work.

I applied to five graduate programs; most of them are now defunct. But I got into Emory, which is one of the ones that's defunct. I actually got into all of them, but Emory offered me the best financial package, so I went to Emory. My parents packed me up and they took me down to Atlanta.

I really was still interested in medical librarianship, but the graduate assistantship, which was part of my financial package, had me working in the downtown main Atlanta Public Library. Old Carnegie building; really, really old Carnegie building [opened 1902]. And it was a fascinating experience. I always thought it would make a great sitcom because the staff would have been like the cast of *Friends* or *Cheers*. And we had regular, really quirky patrons, and we had this really charismatic director, Carlton Rochell, who went on to great things [at New York University]. And it was obviously a big staff with many branches. So that was great experience working on the reference staff.

Miriam Libbey [director of the Emory University medical library] taught the medical library class, but since I started in the summer and the class had prerequisites, I couldn't take her class in that summer that I started. And I was scheduled to graduate in May of the next year, so I was not going to have the opportunity to take Miriam's class. So, then, Abe Lawson, who was the dean, asked Miriam Libbey to kind of create an independent study for me. I probably learned more working with Miriam on some projects than I actually would have if I had taken her class.

RF: You certainly got a much more customized experience.

LF: Yes, I did. So that's what I did. The graduate program was part of the Graduate [School] of Arts and Sciences at Emory, and the Division of Librarianship was where my degree came from. I've never used the appropriate M.Ln. because nobody knows what that is, but that is my official degree: a master's of librarianship.

RF: And were you tempted at all by the public library setting, or had you already set your cap on medical?

LF: Well, I hadn't set my cap on medical. As I was approaching the completion of my master's, I had a favorite professor—whose name I can't remember now—and I had taken kiddie lit on a lark. Because that was not my goal, but I heard that the class was really interesting. And it was really great; I loved that class. And he was very impressed with me, and it turned out that he was also leaving at about the same time to become the director of libraries at a prestigious private school, a K-12 private school. And they had three libraries. They had an elementary school library, a junior high or middle school library, and then they had a senior high library. When he was interviewing, the middle school position was vacant, so he offered it to me. When he got there, they had already filled the position without his input. He was not only furious, he was very disappointed

on my behalf. So I had a bird in hand and threw it away [laughter]. That was what I was going to do, and then suddenly I didn't have anything.

My parents came and they packed me up and they took me back to North Little Rock, Arkansas, which is where they were living. And I went to the public library with an atlas, basically, and went through the *American Library Directory* and just wrote line letters of inquiry to any place that I thought might be interested. World Book Encyclopedia... the Kinsey Institute for Sex Research... in Indiana. My mother was horrified [laughter].

RF: That you would contact them.

LF: Yes. I did. I got a nibble from Kinsey. I was on my way to do an interview. I probably wrote—I think I counted 127 individually typed letters trying to tailor my background to whatever they were looking for. Nothing was happening. I did get this thing from Kinsey.

Out of the blue, this guy from the University of Alabama in Tuscaloosa—which my mother thought was Tuskegee—called and explained that they were starting a branch campus [in Tuscaloosa] of the medical school in Birmingham, and they needed a reference librarian. He had written to a bunch of medical library directors asking if they knew anyone, because this was the old boys' network. That's how you did it. One of the guys that he wrote to was Jess Martin, who was at the University of Tennessee in Memphis, and Jess Martin said, "Well, I just happen to have gotten this letter from this Lynn Fortney, who looks like she has an interesting background. I'll send it to you." So Bobby [Moore] said, "We'd be interested in having you come for an interview." Well, bingo.

I decided, well, I would swing through Tuscaloosa on my way up to Indianapolis or wherever the Kinsey Institute was—there was one other place I was going to as well. I drove over to Tuscaloosa, and I had a really long day, day-and-a-half interview. It was intense.

The director position was vacant. I think the first director of the College of Community Health Sciences [CCHS] library, which is HSL [Health Sciences Library], I think her name was Nancy Bruce. I may have met her once or twice, but I don't know where she is now; the position was vacant because Nancy had moved away. There was no director, no reference librarian. There were three support staff. I interviewed with them; I interviewed with the dean, William Willard, and the associate dean, John Packard, and the assistant dean, Bobby Moore, who was the one that had called me. And I also interviewed with the dean of the newish library school, Jim Ramer.

Little did I know later—and I had studied—that my knowledge of Lister Hill [U.S. senator from Alabama] and his work, and intimate knowledge of the Brandon/Hill list, and the Regional Medical Library Program, and my Emory connection: Bill Willard is the father of family medicine and was the dean of the [University of Kentucky] school of medicine when Al Brandon was there [laughter]. John Packard was one of the early

activists or participants in the Regional Medical Programs under NIH [National Institutes of Health] sponsored by Lister Hill, from which NNLM [Network of the National Library of Medicine] sprung. Bobby Moore I can't say anything about because he was not my favorite person. Jim Ramer had been at Emory at the library school just before I got there. So the old boy network, who you knew, etc., was very much in my favor even though "I weren't no boy." That's how I got the job.

RF: So you became—

LF: The reference librarian. By the time I actually started working, they had hired Nancy Beecham to be the chief medical librarian, and after I'd been there about a year, I came into work and Nancy wasn't there. And we hadn't heard from her. I got a call from one of the deans, probably Bobby because he was the one I reported to, saying, "Nancy Beecham is no longer the director and you're the acting director" [laughter].

RF: Congratulations, huh?

LF: And I'm like twenty-four years old. Okay. And we were building a new library from scratch, basically. We'd started in a really small space on the first floor of the Gorgas Library [university library], and then when our materials actually started arriving, we moved to a huge space on the third floor of the Gorgas Library. We had a lot of shelving, we had a separate work row, we had two offices. There were two people in one office and three people in the other, but we still had offices, so that was something. We were planning to move to the first floor of the new Educational Tower, but the Druid City Hospital [later DCH Health System], the local big hospital in Tuscaloosa, which is where the College of Community Health Sciences was born, to operate out of.

So here I am. We're planning a new library. I'm suddenly the acting director, and I had to write the job description for the ad and I had to know where to place it. We started getting applications and they weren't just coming in like crazy and they weren't exactly stellar, so I applied myself. I thought, yeah, right, this is really going to happen.

I don't know what they were thinking. The dean sent me off to interview people. I'm a candidate for the job, for Pete's sakes [laughter]. What do you think I'm going to tell you? I interviewed two and I wasn't thrilled with either one. They decided to bring one of the two to Tuscaloosa for an in-person thing that I had gone through. He had just graduated from library school and was pursuing his second career because he was not making use of his PhD in physiology or whatever it was. And I knew the only reason they thought that he was more qualified than I, even without any library experience whatsoever, was that he had a quality that I lacked, and that was a penis. So, we're sitting in a dean's meeting—and I went to the dean's meeting as a quote, 'department head,' and Dr. Willard announces that they're going to offer the job to this guy, and I was furious. And I said, "Have you discussed with him what the budget is? Does he know anything about strategic planning? In his interview with me, he couldn't answer any of the questions that I asked him. He doesn't have any library experience. And you're going to hire this man to direct your medical library?" Dean Willard turns to Bobby and

says, “Bobby, hold up on [him].” And I think, thank god, they’re going to reopen the search. That afternoon I had a letter of offer.

RF: Wow.

LF: With Willard’s writing in big letters “Please,” at the bottom of the page.

RF: You spoke up at the right time.

LF: Yes. That was my first example of audacity, I think, of just, what do I have to lose.

We did build a new library. That was a fabulous experience, because my first [Medical Library Association] meeting—let me back up. They assigned me to work with a young architect who was on the team to build this seven-story Educational Tower. The library was going to take the whole first floor, and we were right down the hall from the hospital cafeteria and right by the door to the parking lot. You could not have a more ideal location for a quote, ‘hospital academic library.’ The architect and I both got to attend Art Broering’s “Planning Health Science Libraries” at an MLA CE, and [the architect] was as green as I was. He got a lot out of that. It was great to sit there in the class with Art and work with the architect. I think Art was kind of impressed that the guy was coming to MLA to take his class.

The other class I took was, “MEDLINE and the Health Science Librarian,” taught by Gary Byrd [laughter]. That was a great experience. At the time, and you will remember this, the certification deal for MLA, you had to take an exam, and it was a grueling, grueling exam.

RF: Yes.

LF: Barbara Doughty had been probably the first graduate assistant that we had at CCHS in the library, and when I became the director, she became the reference librarian. She was fantastic. She was so fantastic, they have a scholarship named after her at the School of Library and Information [Studies] at the University of Alabama. She stayed at the Health Sciences Library until she retired. She’s in her eighties now, but she’s still living in Tuscaloosa. She and I studied for that exam until our brains were fried. And part of the exam was quirky things like knowing the names of the leaders and the historical figures within MLA. Barbara and I get to San Antonio at the meeting [1974]. Sarah Brown is the president, Gary Byrd, Art Broering, all these people, and we’re saying, “There’s Joan Titley Adams!” I felt like I was walking amongst gods on earth. We did pass, by the way. Sarah Brown, proctor of my exam in the Tinsley Harrison room at Lister Hill Library, no pressure [she was also library director].

There was the graduate assistant program that we had three students from the library school working as graduate assistants at the Health Sciences Library. So many of them went through that program, and there were several that actually went into medical libraries after that. That’s one of the things I’m proudest of is that we had good

background training for a lot of people coming into library school. They didn't have any kind of a medical library class at that point, so this was the only way they had to do it. Shortly after I arrived at University of Alabama, Dean Ramer asked if I would be willing to teach—I think it was science reference, because they didn't have anybody to do that. So I dug out my notes from, what, six months ago, and I taught science reference.

RF: And you became a faculty member.

LF: Yes, I became an adjunct faculty member. I taught that class for, I think, two years. Then they got somebody to teach it who was on the regular faculty, but then they wanted me to teach whatever the second level of reference was—advanced reference or something. But that turned out to have to be basic reference, because the new focus in library education was more theory than practicality. Whereas I was teaching sources and resources, they were more getting into the theory of information seeking. So, the kids weren't hip. The students were pulling out with an MLS, and they didn't know what *Index Medicus* was, so they had to learn. Or *Science Citation Index*. So I did that. And then when I became director, my time was not available to teach a class.

RF: Let's pause there and come back. But Scott, let's turn to you and tell me a little bit more about your family background and factors that predisposed you to your career choices and education.

T. SCOTT PLUTCHAK: Listening to Lynn, and I know most of the bits and pieces, and thinking about my own path, it's pretty different.

RF: Yes, I think that's an understatement.

SP: I was raised in a small paper mill town. My dad was an auto mechanic. My mother, who later went on to get a master's degree in education, had not gone to college by the time she became a housewife and was raising kids. But she was extremely intellectually curious. She came from a theater family. She had been in vaudeville with her sister when they were little girls.

There were five kids. I was right in the middle. In a household with a lot of books and a really strong interest in education. So although my folks had never gone to college, they were determined that their kids would. I remember the day that I learned to read. I was three years old. I had two older sisters who would come home from school and we would play school. My sister, Beth, who was three years older than me—so she would have been six, first grade, probably—would come home and pretend to teach me to read, using whatever the reader was that she was looking at. And I remember watching her read a page, and then I read the page, and then we flipped, and then she read the page and I read the page, and then I read the next page. And then we'd flipped and I'd read the next page. Beth went running downstairs, saying, "Scott's reading! I taught Scott to read." And they said, "Yeah, yeah, yeah, yeah." And we went down and I showed them, and yes, I could read.

By the time I was seven, eight, nine, I had been through everything in the children's section of the local public library, and that kind of read everything, pursue everything, learn everything I could was basically what drove me, and drove my choices when it came time to go to college. In high school, I basically ran through everything that they had for a kid like me within my first two years. So for my second two years, I went off to this experimental preparatory school, JFK Prep, that was a lot of independent study, a lot of really brilliant, young faculty. And so, again, a lot of literature, a lot of philosophy, intersecting with the fact that this was the late '60s, the early '70s, and it was sex, drugs, and rock 'n' roll in a big way. I won't say that I never did anything illegal, but I never got too badly caught.

RF: You don't have a long criminal record.

SP: I don't have a long criminal record.

LF: You don't even have a short criminal record.

SP: I don't even have a short criminal record. But a lot of that is just luck.

RF: That shoots down the first juicy tidbit in this interview.

SP: So I get through high school and I go off to University of Wisconsin-Milwaukee. I went to the Milwaukee campus largely because my two older sisters had gone to the Madison campus. We went to the state schools because that's what my folks felt they could afford. We didn't really know anything about the kinds of financial aid or scholarships or things that I might have been eligible for.

LF: Oh, he could have gotten into Grinnell on a free ride if they had known.

SP: I did two years at local community college and then I transferred to UWM. And again, because my parents were interested in the kids getting a liberal arts education, we never went with career plans. I never worried about what I was going to make a living at. I figured I would figure that out afterwards. I took the things that were required to get a bachelor's degree, but other than that, I took things that were interesting to me, which were mostly English literature or philosophy classes. When I got to the end of the first semester of my junior year and had to declare a major, I added up my credits and I had three more philosophy credits than I had English credits, so I was a philosophy major. The chair of the philosophy department tried to talk me out of it, because he said there is no career path here unless you want to go into teaching and a PhD, which I was not interested in. And I said, "That's okay, I will figure it out."

Now, by that time I was playing guitar a lot, so music was a big deal. I was playing coffeehouses in Milwaukee. I had gone down to Milwaukee with the intention of being a music major interested in composition, and I found out very quickly that to do that successfully meant a single-minded focus, and I was not a single-minded focus kind of

person. I was too interested in too many things. So I abandoned the plan of being a music major.

The other thing I was interested in was writing, and at that time it was mostly an interest in poetry and fiction. When I graduated, I had met the woman who I married right after I got my degree. She was living in Oshkosh, Wisconsin, and I decided I would get some kind of factory job and I would write all night, and that is what we would do. She was an arts major, so she was going to be an artist, I was going to be a writer. I could support us by working this factory job. And that was okay for two or three years, at which point the factory job was so wearing physically and mentally, and I knew that I was going to have to find something that was more stimulating. So it was not until my mid-twenties that I was really seriously thinking about what am I really going to do for a career.

I was reading a lot of science fiction and I was trying to write science fiction, so I had some interest in computers, and so I looked a little bit into computer science and again thought, no, that's again the sort of single-minded focus. I tried to think back. I said, well, what have I ever done that I've really enjoyed? Because I'd had other factory jobs. I'd been a work-study student in Milwaukee; I'd had a work-study job in the library. And I had really enjoyed that.

I thought, okay, how do people become librarians? I went to the library and found a book on *So You Want to Be a Librarian*. As it happened, the Oshkosh campus had a library program that was being developed by two semi-retired faculty from Michigan who had been at the library school there, had started this program, so it was unaccredited. I can't remember what college it was associated with, but they had done a really good job of putting together a curriculum, of getting some bright people to help teach it. Most of the students were people who were working as school librarians but didn't actually have a library degree, so they were trying to get that credit so that they could basically continue with the jobs that they were doing.

RF: And that was a common situation in the upper Midwest, at that point for school librarians without a formal degree.

SP: So the fact that it was unaccredited for that purpose was probably okay for them. I didn't know any better. I knew nothing about the profession; I knew nothing about the field.

RF: So, accredited, unaccredited didn't mean a lot.

SP: Didn't mean anything to me.

LF: See, this is where my conversation with that young librarian at Grinnell helped me, because I did.

SP: And I didn't know anything about it.

LF: You were just trying to get a job.

SP: Yes. I got into the program, got a graduate assistantship. When I think back on my education and I think about what has happened in library education since, when I think about the comments that you just made about library education and about how it's changed, I think I got a superb education with a really good balance of theory and history and practical knowledge.

We had to do cataloging and we had to type the catalog cards and get all the spacing exactly right, but we also had a really brilliant young woman who was teaching us information theory and Boolean logic and what computers were going to be able to do for information retrieval.

LF: And that was the difference, because when did you go to library school?

SP: 1981, '82 [graduating in 1983].

LF: Okay, so almost a decade after I did, and that's how things have changed. I wouldn't have been able to spell 'Boolean' back when I was...

SP: My job as a graduate assistant was to work the reference desk. I have always been introverted, I have always been shy. At that point in my life, I was very intensely shy. The thought was being at the reference desk was initially pretty terrifying. But it turned out that because I had a focus and a role, there were parameters there that I could work with, and I was really good at it and I loved it.

My ambitions were to get a job as a reference librarian in a college library, and I thought that that would be a fabulous career and I would be completely happy with that. And then I could still do all the writing that I wanted to do. At the beginning of my last semester—it was a three-semester program—my department chair gave me the brochure for the National Library of Medicine Associate Program and said that she thought I should apply. All I knew about NLM at that point was that they were doing some cool things with computers. I think I had taken a special libraries course, so they had touched on NLM. But the line in the brochure that really caught my attention was, annual salary, \$16,000, which sounded pretty good in 1982.

LF: In DC.

SP: Yes. I had told the department chair that I would apply. I got the application together, sent it off, and at that point it was like, okay, that's it. I have met my commitment. Now I need to get on with the business of my getting a job. I think I did go on one local interview. This is March of '83 and I'm due to graduate in two months. And to my astonishment, I get a letter inviting me to come to NLM for an interview. I was convinced they had made a mistake. I had no background in medical. I'm from this unaccredited program. I had done nothing that I could think of to make me stand out. But they invited me to go to DC for a day. Okay.

I had never been on an airplane before. I was twenty-seven. I was wearing my \$3.00 suit from St. Vincent de Paul and carrying my father-in-law's cast-off suitcase and flew to DC, went straight to the [National] Mall, put my suitcase in a locker at the Natural History Museum, and spent the day going to museums on the Mall. I managed to get myself out to Bethesda by that evening to the hotel near NLM, and went in for the interview the next day and had a fabulous time, because I knew that there was no way that I was getting into the program, so I had nothing to lose. But I was going to get to spend the day with these fascinating, brilliant people and I was going to make the most of it.

At that time—I don't know what the interview process is like now—but they had three groups of five people each, and so you met with some human resources people, you got some orientation. But the core of it was these three, five-person interview segments that you went through. It was a really grueling day. The questioning was very tough. Nothing that I found out about the other people who were interviewing changed my impression of my chances of getting in. These were people from Drexel and from big programs. Neil Rambo, who ended up being in my class, was being mentored by Gerry Oppenheimer out in Seattle.

But I had a great time. And one of the things that I particularly remember is, I think the last five-person interview, Lois Ann Colaiaanni was the leader of that particular group, and she was doing these sort of hypotheticals: If you were in this particular kind of a situation, what would you do? And she described a situation in which there were some problem with the head of cataloging or something. She lays out this scenario. And I start to answer, and I refer to the cataloger as 'she.' And Lois Ann stops me and says, "Why are you assuming that it's a she?" and I said, "I'm not assuming. You said it was she when you laid out the scenario."

RF: Ah-ha, caught you.

SP: I did find out much later—and I think it was Betsy Humphreys who I was told said this—that part of the assessment of me afterwards was that I came across as very arrogant and that if I was as good as I thought I was, I was going to be very good indeed [laughter].

RF: My impression for those interviews was that NLM was always looking for potential and thoughtfulness, which you brought to the table.

SP: Well, it was split. And what I learned later—the program reported to Lois Ann, but she always recused herself from making selections. The various recommendations would come in from all of the people involved in the interviews and there was usually a clear consensus as to who should come in and who should not. In my case, it was split right down the middle between those who felt they should take a chance on me and those who thought this is not what we're looking for. It was apparently one of the few times, if not the only time, that Lois Ann was the tiebreaker and decided to bring me into the program.

In conversation with her later on, I think part of it was that she saw some of herself in me. She was also someone who was very shy and very introverted, but was able to be strong and powerful, which could come off as arrogance.

That's how I got in. It was a tremendous experience in exposure to wonderful people. I mentioned that Neil Rambo was in my class, and we got very close. There were six of us in my group, and of the six, I think Neil and I are the ones who really went on to become successful and prominent in the profession. And I think some of it was because we were really the right fit and we didn't come with preconceived notions about what we wanted out of the program, so we were more open books and just really absorbed stuff.

And we would say, the best thing that we did at NLM was spend a lot of time in the cafeteria, the point being that we would go to the cafeteria to talk to people. Because the weird thing about being a library associate, particularly then, was you had tremendous status within the library, no authority or responsibility whatsoever except to show up where you were supposed to be at the time you were supposed to be there, but everybody in the library had to give you five minutes if you knocked on their door. And we really took advantage of that much more than our four other colleagues. We learned a tremendous amount about the library, about the different people, about where things were going.

RF: I would say you and Neil both have a lot of curiosity and very broad interests, so you want to explore all kinds of information, so it was a perfect time for both of you.

SP: And neither of us had a predetermined career path. One of the things I've noticed in looking back at the program and successes and failures, there are people who kind of have their career path mapped out in their minds and they have an opportunity to do something like this fellowship with NLM, and that seems like a really good opportunity to advance and to get that on your resume, and it's a springboard for the things you think you're already going to do. And they don't realize that it's a life-changing year. You will not be the same at the end of that year, no matter what you thought going into it. So if you then try to go on with whatever your plan was, it's not going to connect right and you're not going to have gotten as much out of the program as you might have.

I think you're right—that Neil and I, we were the right kind of people for the program, and it was the right thing for us at the point that we were at in our lives. And the other key thing, and I think we'll come back to this as we track through the decades, the point of the Associate Program was always to develop people who would become leaders in the profession. It was never to prepare people for jobs at NLM or to prepare people for particular positions. It was to develop leadership. And with that comes responsibility.

When I left NLM and everything through the rest of my career, there's always been this strong sense of responsibility to pay back. NLM invested in me and I will spend the rest of my career attempting to pay back that investment. And so as I looked in advance at some of [your] questions, and we'll get at this as we go further, where you ask, why did you get involved in this, why did you do this, how did this make sense, I think part of the

running theme will be, these are all opportunities that I saw to give back and to pay back that investment that NLM had made in this kid coming out of this unaccredited program in Oshkosh, Wisconsin.

RF: Boy, did they get their money's worth. They put in a one-year investment and they got a forty-year payback.

SP: Yes, I got my \$16,000 [laughter].

LF: But, then, didn't you work for NLM for a few years after?

SP: I did.

RF: Talk about that a little bit, Scott, because as you say, the program was intended to create leaders, professionals, and many—most—people, I think, left the program to go elsewhere, but you stayed at NLM for a long period, for three years. So what was behind that?

SP: The program was always clear when you went in that there was no guarantee of a position at NLM at the end of the program. They were very, very careful to make sure that people did not come in with illusions. But they also made it clear that if, as you got near the end of the program, you were interested in the possibility of staying, you should make sure that you let—everybody had a formal mentor to whom they were assigned—and you should let your mentor know; you should explore if there were possibilities that fit for you. So that was also out there.

The part of the program that had the greatest impact on the choices that I made later was the March practicum. The program ran August through the following summer. So, by March of the year, you've been through all of your six months of orientation to NLM, you're starting to work on projects, and they send you out to another institution for a week. And they pick that institution based on what they know about you by then and what might be a good fit.

They sent me to University of Nebraska at Omaha, where Bob Braude was the director. Mark Funk and Carolyn Reid were there; Bob Pisciotto was there. It was a perfect, perfect match. And I didn't know when I left for that week what I wanted to do after NLM, but I knew at the end of that week that I wanted to work in academic medical libraries. I stayed at Bob's house. We would get up in the morning and he would be making breakfast, and he would start talking to me about libraries and about his job and what it was like. He was in his PhD program in Lincoln at the time and he had a night course one time during the week that I was there. I rode along. He was going with his boss, so I could sit in the back seat and listen to the two of them talk about their work. He would have me come to a meeting with him where issues would be presented. We'd go back to his office and he'd say, "Okay, you've seen what's going on. What do you think I should do?" It was a brilliant week, and I knew that that's what I wanted to do.

So I applied to four different academic libraries, but I also let the folks at NLM know that I would be interested in possibly staying for a few years. But I was very clear: I wanted to get into academic libraries. If I stayed for a few years, it would only be for three, because I knew that if you stayed longer, you would get too invested in your program, you would get too specialized, and so you wouldn't really be a good fit for moving on. You'd start a family—whatever. If I didn't get out within three years, I probably wouldn't get out.

Of the four interviews I went to, I got two offers. And Peri Schuyler, who was the assistant chief of Bibliographic Services Division, who was my mentor—and I had let her know that if I was going to stay at NLM, it would be great if I could do this and this and this and this—because, again, I was interested in so many things. She came back a couple weeks later and said, “Well, if you want to stay, we can create a position where you can do this and this and this and this.” And so I turned down the two offers I had gotten and I said, “Okay, I'm going to stay for a few years.” My wife and I loved DC, so that was an easy piece. [Editor's note: Plutchak's position as technical information specialist ran from September 1984 through February 1987.]

RF: And they were custom making the job for you. That was interesting.

SP: I was split between Index Section—so I did indexing, working directly for Thelma Charen. I worked at Bibliographic Services Division on the MEDLARS Management [Section] desk, which meant that I was answering calls on the help desk as people were calling in with problems doing MEDLINE searches. I was the editor of the *NLM Technical Bulletin*. And I was doing some special projects for Hack Schoolman, who was one of the deputy directors—and I can't remember his exact title—but he and I worked on some obscure thing.

LF: And you worked with Sheldon Kotzin, in [the Bibliographic Services Division].

SP: Who was, again, one of the key people keeping an eye on things. This was during the time that NLM developed the Grateful Med program and opened up access to MEDLINE to nonlibrarians. When I went to NLM, you still had to take a week's training and you had to be a librarian in order to be able to search MEDLINE. When I started editing the *Technical Bulletin* in '85, I think we had 2,000 subscribers? There were maybe 2,000 people around the country who had access codes to dial in and search MEDLINE. [Editor's note: See Plutchak's correction to his statement on p. 24 of this interview.] When I left, it was ten times that. You had all of these physicians now using the Grateful Med program to be able to get in. It was just this tremendous shift in how people accessed it, how it related to everything else that was happening with Internet searching, and I got to spend my time working with absolutely brilliant people.

My two-plus years, my timeline, was coming to an end, and so I put out just a couple of—just talked to a couple people that I knew and said, “I'm interested in maybe making a move from NLM. I want to get into an academic library. If you know of anything, please let me know.” I didn't even apply for anything at this point. Rose Woodsmall,

who worked at NLM and who I was close to, said that I should call her friend Judy Messerle, who had an opening for an associate director at St. Louis U, because Rose thought that I would be a really good fit for that position. Judy had had it open and she hadn't found anybody. She had closed it because she was trying to find the right person.

And I thought that that was a ridiculous idea. I was not a supervisor for anybody. I was doing these projects, I was indexing, I was getting a lot of great experience. But I was not in any way, shape, or form ready to take on that level of responsibility in my own mind. But Judy was the president of MLA at the time, and I thought, okay, well, I need to give her a call and tell her that Rose suggested I call her, and see what connection I could make, and so I did. Explained that Rose had suggested I call; that I was not qualified for her position but I thought I would call. And she said, "Well, why don't you send me a resume?" and I tried to talk her out of having me send a resume. But she persuaded me to do that. I sent the resume, and a couple weeks later, she called and asked me to come out for an interview. And I tried to talk her out of that because I didn't want her to waste the money and the time to have me come out and do something that was not going to work for either of us. But, again, she persuaded me to do that. I went out and did the interview and really connected with the people. By the end of the interview day, not only did I want the job, but I was sure they were going to offer it to me. And so they did.

RF: You could tell. The chemistry worked both ways.

SP: Yes, absolutely. So that was 1987, so in February of '87, we packed our stuff up into a U-Haul trailer and drove to St. Louis.

RF: In the interest of a little suspense for listeners, let's stop here, Scott, and go back to where we left off with Lynn. I think we were at the point of wrapping up things that you had done in Tuscaloosa and preparing to make the momentous move to Lister Hill [Library of the Health Sciences at the University of Alabama at Birmingham].

LF: Right. So, this is—

RF: 1982 is when you moved—

LF: I'm going to go back a little bit more. But I moved in '82. This is a true statement.

SP: Yes. I'm still back in Oshkosh in the factory.

LF: Right. You were working in the candle factory, or were you doing typesetting for an Oshkosh [inaudible]?

SP: I was driving a forklift in a candle factory.

RF: Good reminder of the parallel timelines.

LF: Right. I'm in Tuscaloosa. I have married a local boy. My daughter was born. (And, I'm sorry, you listeners at home. We're sitting in very deep, very well-worn, comfy chairs, so I have to get up on the edge of the chair.) My daughter, Marian, was born in 1979. We built the new library. We had the graduate assistantship program going. In '78, the very regal and formidable Sarah Brown retired as the director of the Lister Hill Library in Birmingham, and the Lister Hill Library in Birmingham probably at that point was the largest medical library in the Southeast. Emory might have given them a run for their money, but there were programs that Lister Hill had that Emory didn't have. The most notable would be the history of medicine thing.

Dick Fredericksen followed Sarah Brown. We'd always kind of been given the impression from Sarah that—or I should say, Mrs. Brown—that she pretty much ruled the roost when it came to medical libraries in the state of Alabama. She was obviously not thrilled that they'd started a branch campus with their own library over which she had no authority. I remember the first time we went over there, she called Nancy Beecham, the director when I was still the reference librarian, and said, "I would like you to come to Birmingham because I would like to have you for lunch." And I said to Nancy, "Yeah, I think literally she would like to have us for lunch" [laughter]. So that was my first opportunity to meet some of the staff at Lister Hill, and they were very gracious. I didn't spend a lot of time with Sarah because she just—excuse me, Mrs. Brown—because she just turned us over to the more genial staff members.

Dick came on board and he was interested in trying to see if there was any possibility or what the probability might be of forming some kind of an organization for medical librarians in the state. We started a roundtable with the Alabama Library Association, which is known locally as 'little ALA.' We started the health sciences libraries roundtable, kind of with the goal of attempting to partner with public librarians and such for our expertise in consumer health and patient education materials. But that meant that we met with little ALA at their annual meeting, and we were just kind of an afterthought. And attendance was never very good and interest was never very high, and Dick said, "Well, what if we try to form an organization that was independent?" because our goals were very, very different.

RF: Because at that point in time, there was the Lister Hill Library, there was the Health Sciences Library at Tuscaloosa, but then there was also the medical library at University of South Alabama, and not really much coordination or collaboration.

LF: No, there was no coordination, no cooperation. There's also a couple of vet schools, there were VA librarians. Dick asked me to chair the steering committee [while Fortney was still at CCHS in Tuscaloosa]. We did a feasibility study, and with the help of the Alabama Hospital Association and the Medical Association of the State of Alabama—which is MASA, we were able to identify I think it was 150 prospective medical librarian members. Now, granted, they were not all MLS librarians or full-time or whatever.

We tracked down addresses and we did a survey and we got 110 responses to our survey about whether people would be willing to participate in this kind of venture, and it was an

87% positive response rate. We formed a steering committee. Let's see, I have the names. It was Kathy Dexter, Dick Fredericksen, Anne Toll, who was at Mobile, Rachel Jones, Bobby Powell, who was a local hospital librarian, and me. We worked on goals, objectives, program ideas, what kind of newsletter format if we wanted to do that. And the first meeting [of the Alabama Health Libraries Association (ALHeLA)] was April 10, 1981, at the headquarters of MASA. And they've held an annual meeting ever since then.

The association keeps going. There are no longer 150 some-odd medical librarians in the state of Alabama, but they keep the association going. And I'm proud to say that this past year, they named one of their annual awards the Lynn Fortney Librarian Award. I was very thrilled to go on with that.

Oh, by the way, as an aside, because these are important points, while I was at University of Alabama, I did marry. The marriage dissolved in 1983. Marian is born. When I went to—it was the associate dean [at CCHS] I reported to that time, Doug Scutchfield, and I went to tell him I was pregnant and he said, "Oh, great." Well, thanks for your support, Doug. They didn't have a policy for maternity leave for faculty members. They had one for staff, but not for faculty. Between my accrued vacation time and sick leave, Doug cobbled something together where I would be working at home but coming into the office. I'd tuck Marian into the couch that I had in my office. I had six months of paid maternity leave.

RF: Wow.

LF: Yes. I don't think that's the case anymore, but they didn't know what else to do.

RF: He might not have been supportive at first, but he turned out to be very supportive.

LF: Yes, he turned out to be very supportive. So, thank you, Doug.

While I'm working with Dick and Kathy and Bobby, etc., in this little, tight steering committee, at some point Dick mentions that he has hired this great new associate director for technical services, whose name was something like Rick Forsman, I think it was [laughter]. And when did you get there?

RF: I started in '79.

LF: Okay, so this is right about the same time. He also hired the brilliant Susan Laing. And it was controversial. He hired her to be the head of the multimedia health library. She was not a librarian—OMG—but had an extensive background in consumer health and patient education. So she was ideal. She is now—I have to look this up—she is now the associate chief of staff for education at the VA hospital here in Birmingham, so she knows what she's doing.

He was very proud of those hires and he said, Hilda Harris—who was the head of reference and had been there for a long, long, long time— she actually cried when Kathy Torrente went off to MEDLINE training because it was the end of the era for doing searches. He said, “You know, Hilda Harris, she’s got to be approaching retirement.” And that was my second audacious moment. I piped up and said, “I hope she retires because I’d really like that job” [laughter]. So, when she did retire, I applied.

At that point I knew the library was in crisis. I don’t really know all the background. You were there, Rick. Maybe you can fill me in over lunch. But there had been some situation with the head of circulation, and morale was at an all-time low and nobody trusted anybody else, and it was tech services against public services. And it was just a mess. When I got on the scene, my first job was to try to improve morale. I think there was no one left in reference but Kathy—she was Kathy Jones at the time. That left her as the only MEDLINE searcher, and we had a real active MEDLINE program.

RF: Heavy demand.

LF: Yes. I asked Kathy to train me as a MEDLINE searcher. When we became a MEDLINE center in Tuscaloosa, I sent Barbara Doughty as reference librarian off to the training. I had not had any formal [training] other than the class that I took with Gary [Byrd]. And Kathy was tough, but, boy, I learned MEDLINE from her, and I became a pretty decent MEDLINE searcher because of Kathy.

We had to start [recruitment] to build up the reference staff and get a new head of circulation. Nancy Clemmons had been the librarian for the school of optometry, and she came over and became a reference librarian for us. And I talked Jack Smith, who was the acquisitions librarian, into applying for the job. And it was really weird. I don’t know how we were able to move Nancy into reference—she became head of reference. But they made me go through the whole interview process with Jack. I think I later found out that an individual who was a daughter of Scotty McCallum’s friend—Scotty wanted her to get the job and she didn’t do well on her interview and so she didn’t get the job. But I didn’t know—

SP: Scotty being the president of UAB [University of Alabama at Birmingham].

LF: Yes. Actually, he was not president at the time.

RF: He was, I think, the vice president for health affairs.

LF: Right. So Jack got the job. And we hired one other, whose name escapes me, and a couple of library associates who were not MLS but high level. We hired Sue Sillcox to be the head of circulation. She was also not a librarian, but a pretty decent manager for a while.

Dick had his team. It was you, Rick, and me. You were head of tech services; I was head of public services. Susan Laing had the multimedia health library, which was a

semiautonomous unit. And Melinda Williams, who was the administrative assistant. She was brilliant. Dick had a very participatory management style and encouraged that. He did tons of strategic planning. So gradually, gradually, gradually, things started turning around. It took years.

RF: It took years. And I don't want to touch too lightly on that, because as you said earlier, Hilda had been sort of de facto head of public services for a long time without the ability to do the job well. And certainly no predisposition to be future-oriented or to embrace technology.

LF: Right, she was very old-school. And a lovely woman, but not a visionary.

RF: Very, very fine woman in lots of ways, and I will confess, I'm probably one of the people who brought her to tears as well by being a little pissant.

LF: A little upstart.

RF: But there hadn't been much leadership. And then, when the circulation librarian went off the rails and did something crazy...that created lots of tension and complications between all of the departments in the library, you came in, thank god, with a lot of positive energy, a lot of good will, but a huge job of trying to calm everyone down, restore working relationships. That was not an easy time at all.

LF: No, it was not. And at about the same time, I was going through my divorce from Marian's father, so it was challenging, to say the least.

So, when did we start planning for an integrated library system?

RF: We started in, I think, 1984.

LF: That makes sense to me. Did we look at anything other than Georgetown?

RF: We evaluated several different library automated systems. That was the first step, when we formed the internal planning group to look at automation.

LF: And you were in charge of that planning group, which is why my memory is wiped from all of that. But it was pretty much your baby.

RF: And we worked through the process of winnowing out and making the decision, I think, to go to Georgetown just about the time that I left.

LF: I thought you were there when we did the install. No? Okay, so you got out of Dodge.

RF: I left you on the lurch.

LF: Thanks a lot! We did go with the Georgetown [University] Library Information System—LIS, which we called LISTER. Clever, eh? Library Information System for Teaching, Education, and Research.

So, Dick must have been in charge of the installation. I was in charge of education and training of the staff and working on patron cheat sheets, because this was a brand-new world, particularly for a lot of the older faculty that were used to coming in. Dr. Pittman liked to come in—he was the dean of the medical school—and go through the card catalog. He did not see that this was an improvement. And in many ways it wasn't.

Because of the weird cost-cutting ways that we installed it, it seems to me that the actual server was not in the library but in a few buildings distant. Because of that, the transmission of data back and forth between the terminals in the library and the minicomputer—the minicomputer was at the Rust Computer Center about three blocks away, and the dang thing would crash on a really regular basis. And that made people justifiably upset—staff, everybody.

But on the flip side, there were two amazing things. First of all, we had data that we'd never been able to gather before effectively at our fingertips. Usage data, for instance: We had been using the 'put a green dot on the journal as it's shelved' and then, on an intermittent basis, go through the stacks and see how many green dots had fallen on the floor, so you could get a sense of what journals were being used. They did not adhere well to the bound journals. There was that. We had all this data.

We uploaded the student, faculty, and staff information, so everybody was already in the database. Sometimes, we were able to find out what a faculty member's phone number was easier than anybody on campus because we had an automated database.

The other thing was that the Georgetown system came with Mini-MEDLINE, which was a subset of the MEDLINE database that we had loaded locally—which was just amazing—and it gave our patrons a taste of what was to come in doing their own searching. We still did a lot of MEDLINE searches, but that was probably one of the compelling features of the Georgetown system.

The least compelling feature was that it was proprietary to Georgetown University—which was not a company, but it was sort of a collegial thing. Although we did have a user group of the sixteen or so of us libraries that used the Georgetown system, if Naomi Broering didn't want to do one of the things that we'd ask, Naomi Broering got to say whether it was going to go or not. And that was very frustrating, because she just thought that this was something that she was offering us all out of the goodness of her heart [laughter].

Did they have Georgetown when you started or had they switched?

SP: They had just switched to a different system—and I don't recall, but they had switched to a commercial system. Maybe a year before I got there.

LF: And I don't remember which one it was. Okay, so it was after I left.

Computers were just not used. We had access to the EBSCO serials list on a computer, and that was unusual. But we learned, thanks to MLA CE courses, that you could run a MEDLINE search via personal computer with a modem, and instead of it being run on a Texas Instruments Silent 700 on that photosensitive paper—long roll of paper that faded over time so you couldn't read the search—you could actually print out, edit, delete, reorganize the citations. I wrote a proposal for us to get a personal computer. Actually, I did not write it—Jack Smith wrote the proposal. And it took six months to convince university administration that we weren't going just to use it for gaming, because that's all they knew. No one had PCs. So we got this PC. I think it might have had ten kilobytes of storage. It had word processing and spreadsheet software on it, which we kind of learned by being self-taught; we just played with it. We got our first PC, and that made a difference later on in my career.

RF: It is interesting that the health sciences library was ahead of the rest of the campus in terms of perceiving the value of automation, which I think happens on a lot of campuses—that the library is the leader. And there wasn't a lot of appreciation outside the library for the fact that the library had a serials control system. Dick Fredericksen had brought in Wang word processing instead of a typewriter. He got the grant for the first computer. There was a lot of direction.

SP: And you'll see that continue when you get to my tenure at Lister Hill.

LF: And that has always been my impression of medical libraries, which is why I'm so proud that I became part of the profession. It was always that we were on the cutting edge—or sometimes Dick would call it the 'bleeding edge'—of where technology was going. And we see that now; there's that virtual learning lab at Lister Hill now. I'm not sure the dean even understands how that works.

So, Rick has the audacity to leave us. And you went off to University of Colorado, right?

RF: Yes.

LF: And in [1987], Dick Fredericksen is summarily removed as director of the library. He wasn't fired because he had tenure. I'm called in and told—sounds familiar—that I'm going to be the acting director. Once again. But it wasn't going to be for very long. We won't go into the background there, but Rick and I both know [how] that is. Well, they were incorrect about that. They told me it would probably be about two months. But at that point, I had been rigidly versed in EEOC and what the requirements were, and you've got to open it up nationally, you've got to advertise in respected resources for a set period of time. And I'm thinking, there's no way this can happen in two months.

They established a search committee and things dragged on, and they dragged on, and they dragged on. And I would look up and see Nina Matheson going up in the elevator

and I'm thinking, okay; or I'd look around and there was Mary Horres talking to somebody in reference. Mary Horres was a medical librarian in California. But they kept us pretty much in the dark about what was going on. They made a decision as to who they were going to hire. I had applied, of course. The chair of the search committee called me and said, "Well, we're thinking of hiring XYZ because we just don't think that you're old enough to take on this job." I would have been thirty-five years old. The person that they were thinking of hiring had gone to Emory two years behind me, so I knew that she was younger than I was and I let her know that. "No, this is not a legitimate reason. If there's something about my qualifications, that's fine, but don't tell me that I'm not old enough."

RF: And if I remember correctly, the chair of the search committee was [inaudible]. And she was telling you—

LF: It was Sara Finley. Right. We were told in about August of '88—so I'd been acting director a little more than a year, I guess—that someone—maybe I shouldn't name names—let's call her Dolores Umbridge from Harry Potter. We were gathered in a semicircle and she sat in front of us, and we were told that we were not to ask her any questions; she was there to ask us questions. Okay. And I thought, that's odd, but anyway, so, whatever.

She came on board and seemed to take an instant dislike to me and pretty much started destroying all the morale that we worked so hard to build up. There was a resistance—there was a rise of a resistance. She didn't like the fact that people from tech services and people from public services would have lunch together. She didn't like the fact that I talked to other librarians in other academic health sciences libraries to find out what they were doing about this, that, and the other. She didn't like much of anything that was going on. She did end up hiring the daughter of Scotty's friend. It was misery. It was January and I'd had a month of Mondays at that point; it was just awful.

And I had excellent support from other medical librarians. Tom Basler, in particular, was my rock. I could call Tom. He was at the Medical College of Georgia at that point and he moved on later to the Medical University of South Carolina in Charleston. He was great to me. T. Mark Hodges [at Vanderbilt] was very supportive. Nancy Lorenzi, who was still at Cincinnati—and she's now a senior provost at Vanderbilt University—Nancy was looking to bring me up to Cincinnati and I was really ready to go at that point.

One day in January, the phone rings and they call me to the phone, and they say, "It's Kathleen Born on the phone." Kathleen Born had been one of my graduate assistants in Tuscaloosa—one of my many graduate assistants in Tuscaloosa—and she had gone on to work for EBSCO Subscription Services, which was the subscription agent that Lister Hill used and that Tuscaloosa used and was prominent in the Southeast. At that point, we probably thought they were about the only ones out there. They had a very collegial relationship with us. They were interested in investigating this databases on CD-ROM idea, and they'd sent people out. They also had been hugely supportive. Dixon Brooke, who was the head of the Subscription Services Division, had sponsored the first ALHeLA

banquet at the first meeting. And I remember sitting next to him and Dell, his wife, and our children were about the same age. He was just wonderfully gracious.

I come across the reference floor to pick up the phone in my office and I pick up the phone and say, "Kathleen, get me out of here!" and she said—there was a long pause; Kathleen was very much the Southern lady. She still is the Southern lady—she said, "That's odd. That's why I'm calling." And I said, "Oh, really?" She said, "Yeah, Dixon and Joe Weed and some others have been looking at the statistics, and it looks like medical libraries are an untapped market for us. But we clearly know that they're way different than other kinds of libraries, but we don't know how they are different or why or what we could do differently."

That commenced a probably two-, three-month period of me doing free consulting for them and going out and talking to Joe—who you remember—and Dixon, and they would bounce ideas off of me. This was not an interview, so I was just being myself and saying what I thought, and "No, I think that's not a good idea," or "That kind of looks bad to the medical library community. You should do this instead." After about three months, Dixon offered me a job.

RF: I think that was the EBSCO style of selecting employees.

LF: Oh, it was very much non-EEOC.

RF: But also, not always a formal job opening that you're applying for. It was a little bit of a subterfuge interview, protective process, to test the waters and see what they thought of you.

LF: Right, right. The job was fascinating to think about, because it's like when a layman—in other words, a nonlibrarian—walks into a library and they think that every employee they see is a librarian, which is incorrect, and that that's all there is. And little do they know that there is a whole cadre of staff, unfortunately, usually in the basement, doing the selection and the cataloging and the prepping of the materials and making sure the online catalog is maintained, etc. That's what it was like at EBSCO.

I knew Chuck Leachman, my sales rep, and I knew a couple of the executives, and I knew Dixon, and I knew Kathleen, but there were a thousand people in that building working.

RF: Most people had no idea.

LF: No idea whatsoever. And the job was basically mine to create. All they wanted was to learn more about medical libraries and figure out what they could do better to gain more business.

RF: And we'll pause here.

[WAV recording 2]

RF: This is the continuation of an interview with Lynn Fortney and Scott Plutchak on January 9, 2020, in Birmingham, Alabama. Did anything come to mind during our lunch break that you wanted to circle back to?

SP: Yes. I want to make one correction to something I said about my time at NLM. When I mentioned that I had been the editor of the *NLM Technical Bulletin*—this was the monthly newsletter that went out to everybody who had a MEDLINE access code with the latest updates and new terms and tips to help with searching—I inflated the numbers that we were sending, because the reality, as I was sitting here thinking of the numbers, in this day and age when millions of us are connected to the Internet all the time, just seemed impossible. But in 1985, when I was editor of the *Technical Bulletin*, we sent out 200 a month, not 2,000. There were 200 people in the United States who had an access code to searching MEDLINE. Because if you think about it, there's a little over a hundred medical schools, and the only people who had access codes were librarians at those medical schools.

LF: It was a pretty rarified club.

SP: It was 200. Now, when I left two years later, it was ten times that; it was 2,000. Because we now had opened up, through Grateful Med, access to individual health professionals. Now, you no longer had to be a librarian, but you had to be a legitimate health professional. It was not until several years later, when MEDLINE became available on the Internet, that it was opened up to anybody. But still, health professionals could now get a Grateful Med code. And when I started on the MEDLARS Service Desk in 1985, most of our questions were the librarians needing help with really complicated search strategies, to two years later, dealing with excited, semi-savvy computer docs trying to figure out their modem settings.

LF: And didn't they sell the Grateful Med software on a disk?

SP: It was a floppy disk.

LF: Because we were selling them at the circ desk for \$19.95, probably.

SP: Yes. And they were sold through the local library, so if you had an arrangement with your local library you could get the software.

Little side point, which I think is mentioned by some—and it's a nice note, since Don Lindberg passed away not long ago—when the software was being developed, it needed to be named. And so a number of names were sent forward to the director's office, most of which were about as boring and vanilla as MEDLINE and MEDLARS, etc. Somebody daringly stuck in Grateful Med, and everybody was *shocked* when that's the name that Don picked [laughter].

LF: A side of him that people did not appreciate.

RF: He could be very surprising at times.

SP: He could be. So, yes, that's the one thing that I thought of during lunch that I wanted to get in.

RF: And I think that's a great point, Scott, because you sometimes lose track, as connected as the world is now, of how meager the beginnings were of electronic access and how things have scaled unimaginably beyond what we thought they might at that point in time.

SP: And it's also a point I try to make whenever the opportunity arises—that it was the National Library of Medicine and MEDLINE that was the first publicly available online database in the world. All of this searching of amazing resources that we do got its start from some brilliant people, going back to the early '60s, at the National Library of Medicine, with government funding, to try to develop these unimaginable new ways of sharing important information.

RF: Quite amazing.

LF: Unfathomable.

RF: Well, let's go back to an earlier point in our conversation and pick up from where you left NLM and went to St. Louis University [SLU].

SP: Right. I go to St. Louis University as the associate director. And that is a tremendously formative experience. Judy Messerle was just unbelievably good at pulling people together and at thinking imaginatively and at encouraging people to be more than they thought that they could be.

My specific responsibilities: The head of circulation reported to me, the head of interlibrary loan. We had a head of reference and head of technical services whose titles were assistant directors. As associate director, I had some modest supervisory responsibilities, but I sort of saw it as, I was the first among equals with the assistant directors. And then I would be the one who would step in for Judy when she needed somebody to step in for her.

She really molded me. I learned so much about people and working with people. The lesson—which I carried through my entire time at Lister Hill, and I hope that's shared with the people who've worked with me and gone on—is that if you put together the right team, you can do anything, even if you don't have money. If you have a lot of money and you don't have the right people, you can't do anything. It doesn't matter. So the focus is always on paying attention to the people. That was one general lesson.

The more specific lesson was, as essential as group process is, it's not natural behavior, so you can't take a half a dozen or a dozen smart people and put them in a conference room and present them with a problem and expect that they're all just going to get along and figure out how to solve it. All of the natural tensions and anxieties, jealousies and confusions and insecurities, all of those normal personal traits are going to get in the way. If you want good group process, you've got to be very intentional. You've got to do training. You've got to set up rules, you've got to set up expectations. You've got to learn how to encourage good behavior and how to mitigate bad behavior. And she was *fabulous* at that. I think that that's probably the biggest and most important thing I learned from her.

The downside from my time at SLU is, she was only there for such a relatively short time while I was there when she got the opportunity to go to Harvard. I was very proud and excited for her to be able to go to Harvard, but I was not ready to make that leap. I was uncertain about it at the time, but in retrospect, it's really clear I was out of my depth. So she left. I was appointed interim director. They interviewed several people. They interviewed me; offered me the position; I took the position.

RF: And that was only seven years after you were out of library school.

SP: Yes. I had learned a lot from Judy, but I hadn't had a chance to really put it into practice. And at the same time that this was happening, my first marriage was collapsing, so there was a lot of stuff in my personal life.

I had really good people, but my senior staff were all more experienced than I was. And while we had good personal relationships, I didn't know enough to be the kind of leader that I think they really needed. They actually did more propping me up, I think, than I did in really providing the right kind of leadership.

Now, we were able to do a lot of really cool things. One of the things that Judy had had me do, one of my first jobs when I came in as associate director, was to bring personal computers into the library. At the time that I arrived, there was an Apple IIe that Judy's secretary used for word processing and there was an Apple IIe in the AV department sitting under the counter because it had seemed like a good thing to get, but nobody really knew what to do with it. So this is '87. Judy wanted me to get personal computers for the four reference librarians so that they would all be able to do their MEDLINE searching with personal computers.

LF: Wow, so we were two years ahead of them at Lister Hill [laughter].

SP: There you go. I spent a month or six weeks investigating, getting bids, and then going through this long process of getting it through the university purchasing in order to buy four personal computers—the 8086 [micro]processor, so the equivalent of the IBM XT, Epscons. And, of course, by the time I left, we were just buying them out of the normal supply budget.

We were doing email over BITNET by connecting into minicomputers that the university had. Some people had heard about the Internet, but we were using BITNET, which was one of the small regional networks [cooperative university computer network]. I wanted to put a local area network into the library so that people within the library would be able to communicate with each other on the local area network. The reference staff, who basically all sat within an area twice the size of this little room that we're in here in their own little cubicles, could not understand why they would ever want to email each other.

LF: They're right next to each other.

SP: I said, "Trust me." We put in this local area network, and of course, within a couple of months, they were seeing how convenient it was to be able to send these messages back and forth and store things and have this record. We gradually expanded that to the rest of the library. And kind of the experience that you all described earlier about Lister Hill being in the lead in incorporating the latest technologies into UAB, we were doing the same thing at St. Louis University, because that's what medical librarians did.

So, Judy goes off and I'm now leading the place. In the early '90s, we get Mosaic; we'd had the World Wide Web, but if you recall, in the early '90s, the World Wide Web was still all character-based. You typed in commands line by line, and you learned how to backspace when you got something wrong, and all the tediousness. But you could still get around this very, very small group of computer geeks and some physical scientists and some savvy librarians who were using this. If there was conversation about the future of the World Wide Web, it was about how it would always be this experimental research-based, noncommercial—because you would never allow commercial entities to get connected to the Internet. That would be terrible.

LF: No, no—remind me to talk about that.

RF: Very private system.

SP: But then, these smart guys in Urbana-Champaign, I think, come out with a graphical browser, Mosaic. People who were doing a lot of work with Apple had been able to experiment a little bit with HyperCard. Remember HyperCard, where you could actually click and link and click and link. But outside of that little world of people who experimented with that stuff, the notion of connecting a document to a document to a document like that was completely foreign to the general public. People literally could not conceptualize it. If I was trying to talk to the department chair or faculty member about this new way of accessing information, I realized I could talk about it, but they literally could not conceive of what I was talking about. I had to get them to a computer and I had to sit down and I had to bring up Mosaic and show them how you could click on this link and go to another document and go to another document. And then it was like, holy shit.

LF: Yes, it was unconceivable in those days.

SP: It was literally inconceivable.

RF: They had no mental framework.

SP: I used to use this date in presentations later on. I refer to the Gutenberg moment, which is November of 1994, which is when Netscape becomes available. Because Mosaic was still used principally by people in educational research. But they made Netscape available to anybody with a computer. For the first time, anybody with a computer could download Netscape and could get on the World Wide Web.

If you think about Gutenberg and what makes his invention so key, it's bringing a bunch of different inventions together at a particular time. It's being able to cast type, the metalsmithing involved in being able to do that to that precision, being able to make paper of exactly the right texture so that it can absorb the ink which you are now carefully being able to make. The press itself, which comes out of winemaking. And the brilliance is taking all of these different technologies and bringing them together to create the movable type press, which then revolutionizes communication.

The introduction of Netscape, to me, is that same thing, because you've got the personal computer, you've got the network, you've got the World Wide Web, and then you've got the graphical interface that anybody can use, and that brings it all together.

At the point that that was happening—and I was being very excited about that, and we were doing really cool things within the library about that—I was just about to bail from librarianship. I was in over my head, but I had gotten to the point where I now thought I had a handle on the kind of leader that I wanted to be and the way that I really thought that I could manage a library. But all of my relationships had been established, and there wasn't really any way to change those relationships. I was kind of stuck in these patterns that were no longer working for me and that I didn't think were effective for the place I was in.

I'd been through my divorce. I was seeing a young woman and that relationship was getting near the end. I was spending a lot of time with artists and musicians and reconnecting with aspects of myself that had kind of gone fallow for the past ten years, and I was thinking, it may be time for me to just make a big change. Let me do this for another year or two so I can kind of regain my financial footing from the divorce and I can say goodbye to librarianship and I can go back to my dream of finding some way of making a living and I can just try to focus on doing some writing and playing some guitar and making that kind of a life.

And it was right about that time that I finally went out to dinner with Lynn. And I'm going to pause there.

LF: Because I'm off doing my own thing.

RF: Yes, you had made the transition to EBSCO.

LF: Right. I went to EBSCO in July of 1989. I worked directly for Dixon Brooke, who later became the president and chief executive officer of this multi-diversified, global, private Forbes [top 200] company. I didn't realize at the time the scope of the company. It still is much larger than most librarians realize. It is still family held, even though the principals have all retired.

I walk in the door and this is a brand-new job. It's mine to create, basically. I knew what the goal was: it was to get—frankly—more medical library business, particularly academic medical library business. Because they were taking the high-priced *Methods in Enzymology* [...and other titles mentioned]. Lots and lots of titles published in Europe, which had good margins. And I did understand, as I was told when I walked in the door—I understood more of how the industry—is what they called it—worked than most librarians did.

The publishers we worked with back then didn't sell the journals to us. We never touched the journals, for the most part. For the work that we did for the publishers, they paid us a commission, and it varied. It was a small commission in the single digits, but it varied by publisher. Magazines that had a very high proportion of advertising, we got a very big commission because they got most of their income from the advertising. Journals, on the other hand, had very little advertising, didn't provide much of a commission, because they didn't have the advertising budget. So that was one thing I understood. Then on top of that, depending on how much money we were making off the publishers' commissions, we would charge the librarian a service charge—again, in the low, low single digits. Public librarians often paid a service charge that was way less than what a medical librarian would pay for the reasons I just described. They were getting *Ladies' Home Journal* with lots of advertising.

It was kind of my job to visit customers, and I think we had three academic medical libraries. Lister Hill was one, South Carolina was one; I don't remember now who the third one was. The world was my oyster. I could hardly do worse.

RF: And your initial title at that stage was medical library marketing manager, which tells you a lot about EBSCO's perception of your role.

LF: Right—of their focus. It was not to be a sales representative because we had those in place, but to work with the sales representatives when they went to call on a medical library that was unfamiliar with EBSCO. I could talk medical librarian-ese with the prospective client, and the sales rep hopefully would learn something about what I was saying—so he or she would know what I said. It was a marketing effort directed toward the library, but it was also a training effort directed toward our sales force.

I didn't go on every visit. Obviously, I couldn't have done that. But if the sales rep was able to develop any kind of a relationship with the client, and it came time for us to start talking turkey, then I would go. And it was all relationship business, because we were not selling a thing; we were selling a service. If it's a service, you have got to trust the

person that's representing that service or you're not going to buy. I did a lot of that. And then, as I was there a little bit longer—well, let me tell you more about when I started.

RF: Huge transition from an academic library.

LF: A huge transition. I didn't have an office. I had a World War II surplus desk down the corridor from the president's office, shielded kind of by a tall file cabinet, so I had a little bit of privacy. I did have a window. And you're familiar with the EBSCO building. It's just gorgeous. Looks out over the valley, and just beautiful. I'm down the hall from the president—not the man I worked for; he was a floor beneath me—but the president of the company, who was at the time James T. Stephens. EBSCO stands for the founder's name, Elton Bryson Stephens Company, and James was Mr. Elton's son. Dixon was Mr. Elton's son-in-law.

RF: Dixon Brooke.

LF: Yes. I'm sitting down at my desk trying to figure out, okay, what is my job here. And Jim has a very big, booming voice and an open-door policy. I heard things that I probably shouldn't have heard, but it kind of gave me a sense of how things worked. And, Lynn, you're not in Kansas anymore.

RF: You're on the executive floor hearing things.

LF: Yes, I'm on the executive floor and this is how it worked.

Dixon gives me a Dictaphone so that I can do my memos, and I'm going to take the dictation tapes down to his secretary, so that she can type them up and then give them back to me to proofread. And I thought, this is ridiculous. I've been using a PC now for, well, at this point it would be four or five years, and I'm used to typing my own things and it's faster and I know how to use word processing. I go to Dixon and say, can I have a PC? Everyone else, all the executives had Dictaphones, and it was only the lower-level staff that had hard-wired terminals connected to what was purported to be the largest computer installation in the state of Alabama. It was amazing to see back when the computers were the size they were back then. I managed to talk them into that. We did not have to go through a six-month evaluative process, which was a wonder. Because I had this old, clunky desk, I had to find some way to make a keyboard. And so I took the top of a photocopy box and taped it down to the edge of the front of the desk. That was my keyboard tray.

There were a bunch of us new people who were all stuck at the same end of the corridor together, and we got along great and it was a lot of fun. One of them had been an agent for the FBI for a while. He was fascinating. He was our recruiter. You couldn't say anything to him that he could not see through. It was hilarious.

I was on Dixon's executive committee and I began to see that it was really important for me to know exactly what was happening in all the academic libraries in the United States,

although I didn't have the United States as a territory. I was supposed to be a global representative.

So, I think I joined—I think it was seven different MLA chapters and every year tried to get to as many of their meetings as I possibly could, but most of them were all happening in the fall with the exception of the two California, etc. chapters, which usually happened in February. That's how I picked up on trends and what the primary keynote addresses were addressing, what CE courses were being taught. That's how I met people...

Jim Stephens is very excited and very gracious to me; he takes me out to lunch. He's very happy I'm on board. And it's been made known to our global staff that Lynn Fortney is available to present at meetings. I immediately get an invitation to present at the Hong Kong Library Association. This is cool. I had something that I prepared, so I was able to have that. It was going to be over American Thanksgiving holiday, so November. I start in July, and this is probably September and October that I'm invited to do this. And Jim calls me up, and he wants me to go to Italy at that same time. I have to tell the boss, I can't go to Italy to help them with MEDLINE because I have to be at Hong Kong [laughter]. I thought, this is surreal. I can't believe this. I go and I do the thing in Hong Kong, and it's a fascinating experience because they're starting to do retrocon—retrospective conversion—in Chinese. We go around and see some libraries and see how they were doing. That was an amazing experience. It was the first of many, many, many amazing experiences.

Kathleen Born—who is the woman who called me and said—she was my mentor, and shortly after I was appointed as the medical library person, she was appointed as the academic library person, so we did an awful lot together.

RF: Sure. And she would be a lovely person to work with.

LF: Oh, yes, she was absolutely a lovely person.

In '92, I was invited to do a keynote at the European Conference of Medical Libraries in Montpellier, France, so I thought I would take my thirteen-year-old daughter and we had a trip to Paris and etc. planned. And then one of our other European offices wanted me to come help them, probably with MEDLINE, because they were clueless about MEDLINE. I practically went in tears, saying to Dixon, I already have this—Marian is going with me. I can't do this. And he said, "Nah, don't worry about it. I'll call them and say... we'll figure something out." So that was a lot of fun.

I do want to talk about our experience in Warsaw [laughter].

SP: All right, well, you have to wait until the appropriate point.

LF: Okay, all right, but that's a goody.

They wanted me to develop relationships with the academic medical library directors, of which there may have been 137 or so. So that was my focus. Hospital libraries, yes, that's fine, but it's the academic libraries that are spending a lot of money. The directors usually hold the purse strings. They're going to make a final decision based on the recommendation of their serials librarian, so we want you to convince them to trust us with their business.

In order to do this, we started to do, at my recommendation, a series of seminars where I would invite—or I would expect to get—about a dozen academic medical library directors, some customers, some not. Tried to get a good mix. I tried, based on my knowledge of personalities—I tried to get groups of people that I knew kind of knew each other and maybe throw some newbies in there to give them a chance to learn from other people.

Kathy Hoffman was going to be one of my guest speakers. The deal was, they came in on a Wednesday. We did a full day of programming. In the morning it was EBSCO programming—EBSCO focused programming. In the afternoon, three of the twelve would make presentations based around a theme, and the Friday morning was more of a wrap-up in questions—

SP: And you had done several of these by this time.

LF: Yes, I had done several of these. And Judy Messerle had been to one of them. That's an important point, because Kathy was supposed to come and she was going to be one of my speakers in the afternoon and she ended up having to have emergency surgery and wasn't going to be able to come. And I'm thinking, oh, my word, it's like two weeks before this. What are we going to do? I called Judy, who had been to one, and I said, "Can you recommend a good speaker for this." She said, "Well, yeah, I think Scott Plutchak would be good," and I'm thinking, who is that? Well, as we have heard, he's at St. Louis University. I called him up and explained what the deal is. And I don't know if you had ever heard of these seminars.

SP: No, I had not heard of the seminars. I knew you by reputation because this is [1992], and so you had been getting around a lot. And I had actually laid eyes on you the previous fall.

LF: Oh, at MCMLA [Midcontinental Chapter of the Medical Library Association]. Because Mark Funk had asked me to do a talk.

SP: At the MCMLA meeting. I remember sitting in the lobby writing in my journal. And I was looking at the program to see what was going on in the afternoon and I saw that Lynn Fortney was doing a program in such and such a room. And as I'm looking up, I see this very attractive woman walking across the hallway in I think a red suit in a very determined manner, hair pulled back in a bun with a bow on it, and I thought, oh, that must be Lynn Fortney. She's cute.

LF: So, anyway, he'd heard of me and seen me from a distance, so I explained what was going on. And he said, "That sounds really interesting. But I'm supposed to go see my girlfriend in Chicago."

SP: If I could interrupt. And she says, "Would you be willing to come and speak on this topic?" and I say, "Sure." And she says, "Can you do it the weekend after next?" and that's when I say—

LF: And I said, "When were you expecting to meet her?" She was a St. Louis girlfriend but they were having a rendezvous in Chicago. And I don't remember what you said, but I said, "That's no problem. EBSCO will fly you back to St. Louis with a stop in Chicago for the weekend. We'll pay your airfare to get up there"—which, again, I couldn't do that in an academic setting. So he says, "Okay."

I go over to what's now the Hilton, where we were all supposed to meet at six-thirty on February 26th of 1992, and I know personally every one of the participants except for this one. I'm there. People are coming off the elevator. And Scott walks up to the crowd, and, process of elimination, I say, "And you must be Scott." And I think he said, "I must be" [laughter]. We gather everybody; we go out to dinner. Victor Basile was coming to that one. Wasn't that the deal? I'm flitting around doing my thing. You sat at a different table with Kathleen Born, who later told me, "He is really interesting. I think you would really like him." And that was that. Then I pursued you as a prospective customer.

SP: Yes. For the next year and a half, we would see each other at meetings, and she would invite me to dinner.

LF: Because that's what I did. I was an equal opportunity diner.

SP: That's what she did. And I usually had something else going on. I had friends that I was going to visit with and see, and I would say thank you very much, but why don't you take—and usually Linda Hulbert, who was my assistant director of tech services, and who you knew—

LF: Who I knew really well.

SP: She'd be happy to go with you and it's nice to see you, but etc., etc. And it certainly wasn't that I had any objection to going to dinner with a vendor. That was not how I wanted to spend my time.

LF: Some people did, though. Some people couldn't.

SP: Yes, which is why I emphasized that. So, then, in Chicago at MLA '93, I was again having some romantic meltdown, whatever; something was not going well. And you were getting a group of people together to go out to dinner—

LF: At the Parthenon.

SP: At the Parthenon, and invited me to join you. I went along on that, but then I was meeting people from the South Dakota group at Excalibur—which was the big dance club in Chicago—later, so I bailed early from dinner and went to Excalibur. She shows up about an hour and a half later, and so we did some dancing and hanging out and that was fine. The following October, we are at the MCMLA meeting in Omaha, and again, she asks me out to dinner. And as it happened—

LF: I had to learn over time that there were some directors that really enjoyed the big group dinner and then there were others, they were very uncomfortable with that kind of thing. And I totally got that. But it took me several iterations and I realized that he was in the latter group. Going out with twelve people was really not your thing.

SP: Yes. So, when she asked me—as it happened, the person who had kind of become my dancing buddy, who I would normally have gone out with on that evening to see if we could find a place to go dancing, was not at that meeting, so I had a free evening. And so I said, “Okay, sure, let’s go.”

LF: You were nicer than that.

SP: Yeah. But we went out to dinner at a very nice place, just the two of us, and had a really, really wonderful evening. And didn’t talk business at all. It was not the kind of, oh, I’m going to have to spend an evening getting the sales pitch. It was really nice and—

LF: That was not what I was supposed to do.

SP: Right, which I didn’t know. So, a month later, we were in DC at an AAMC [Association of American Medical Colleges] meeting. We are in the big plenary session and she sees me from across the hall and comes over and invites me out to dinner. And I say, “Yes, I would be very happy because I really enjoyed—”

LF: You were much more enthusiastic.

SP: I was. We ended up having this kind of progressive dinner, because by then I knew lots of places in DC. We went to one place for appetizers and someplace else for dinner and someplace else for dessert. And about midway through, I said something about, “You know, I’m having much too good of a time. I really can’t let EBSCO just pay for this. Let’s just split it.” So that’s what we did... And then we started emailing each other.

LF: Well, if I can interject, we were both in romantic relationships that were disintegrating. And since we purportedly had no interest in each other, we were confiding in the way that you wouldn’t with a potential romantic. We were more ourselves probably than we would have been—

SP: Exactly. The way I refer to it is that we were both crying on each other's electronic shoulders. And by this point I had told her about the band that I was in in St. Louis. St. Louis was a big TWA hub at the time, so with all of her traveling, I said—and I think this is probably in an email—sometime when you're traveling, if you're coming through St. Louis, stay overnight and you can come and see my band. And she emails me back and says, "How does December 8th look for you?"

LF: Yes, because I had a trip to go see Dave Boilard and I was going to have to go through St. Louis to get to him in Ohio.

SP: But what I did not realize is that her relationship, which was disintegrating, you were going to spend the weekend before you saw Boilard going through Atlanta to see the boyfriend, who decided that, no, she shouldn't come to Atlanta because he needed to be grading papers that weekend.

RF: That doesn't sound very promising.

LF: No, it wasn't. So, okay, I go up to St. Louis.

SP: She comes to St. Louis and I put her up in a hotel, and she comes and sees my band.

LF: And of course his girlfriend was furious.

SP: She was pretty upset. She apparently wasn't quite ready to accept the former girlfriend position yet. We were both still pretty convinced that this was a really nice, professional, collegial friendship and it was really great that we had found each other this way.

RF: As close friends.

SP: As close friends. I believe that my friends who were observing the interaction between us in St. Louis were placing bets on the timing that would be involved. At the same time that this is happening, my father has just been diagnosed with cancer of the esophagus. He's up in Wisconsin, so I'm having this crisis going on. Given the technology at the time, as I say, we're emailing back and forth, when I would send an email to her, she obviously trying to be discreet about this relationship, would send the email to the staff printer in the common room and go and get the email—

LF: Right away.

SP: Giggling about another email from Scott, to the point where Dixon finally had to call her into his office and suggest that she needed to tone things down.

LF: It's [inaudible]. He was right.

SP: So we started writing each other physical letters, and during the course of December, I was writing to her every day. And the letters are getting more intense. My dad has surgery just after Christmas. I spend New Year's Eve with him in the ICU. I'm in the lounge. She and I are on the phone. We're drinking champagne. She's in Birmingham; I'm here. She invites me to come and visit her in Birmingham when the holidays are over.

And again, through all this time, she still has the other boyfriend. We are still telling each other this is a platonic weekend. She is telling me in letters that she's getting ready for me to visit, and one of the things that she needs to do is get the guest room cleaned out so that I will have a place to stay. I arrive at the airport, and this is pre-9/11, so anybody can come in. And I get off—through the gate and into the concourse—and I look down and she is just coming down through the concourse. As I see her, she breaks into a run, and honest to god, time slows down, and she does the slow-motion run down the concourse into my arms. We wrap each other up, give each other this huge kiss, stand back, totally shocked and freaked out about what has just happened.

RF: A movie moment.

SP: Exactly. I get in the car. As we're driving back, she gives me one more letter, which she's finished writing that morning, in which, among other things, she says that she hasn't gotten around to getting the guest room cleaned out. And so that was the point at which we realized, okay, we must confess there is something more going on.

LF: But the other boyfriend, Nick, I had met through AAMC, at a AAMC meeting a couple years before, and he was at Houston. Not a librarian. We hadn't been seeing each other very often at all. But when he could, depending on our travel schedules, we would have a rendezvous. I was very open with both of them about what was going on, but it wasn't until Scott started to come visit that Nick turned up the heat. All of a sudden, I was way more interesting, apparently, than his papers that he had to grade.

SP: It would be great fun to spend the rest of the day talking about the next four months—

LF: But we won't.

SP: It was a little bit awkward at first, because once we realized we were in this relationship, we also had the professional relationship to finesse. We did keep it very quiet until the San Antonio [MLA] meeting [1994], which is when we then sort of said to people publicly, we are a couple. I think we had figured out by then how to deal with the conflict of interest and that there were just certain things that she couldn't say to me and there were certain things that I would not ask. And we always were very, very conscious and very, very strict about maintaining that separation.

Over the course of those next two years, roughly—or year and a half, I guess—from San Antonio, as the relationship deepened and I explained why it made sense for us to get

married, and she said, “Well, many men have wanted me. You’re the first one who’s used strategic planning to try to get me.” A definite aphrodisiac for Lynn.

LF: Right.

SP: Given where I was in terms of my career at St. Louis, I knew, as I said earlier, I was going to have to make a move. The timing was right for me, and I started exploring what options there might be in Birmingham. After Virginia Algermissen had been summarily fired [and] Lynn had gone to EBSCO, Nancy Clemmons is now the acting director—has been for a couple of years. She has made it clear that she does not want the director’s job.

LF: And Nancy Clemmons and I were really good friends.

SP: I started contacting Terry Hickey, who was the assistant VP to whom the library reported just to say, this is who I am. I have this personal reason for being interested in Birmingham. I’ve done this library stuff. I’m very involved with informatics. I’m very connected to the National Library of Medicine. Are there potential positions for me in or out of the library? And over the course of a couple of months, what resulted was they reopened the search for the director. They set up a very good and very rigorous search.

LF: Very.

SP: I came down and interviewed four or five times.

LF: It was five times.

RF: Wow. That’s got to be a record.

LF: Yes, because they really did not have a good track record.

SP: Right. They made sure there were a lot of librarians involved. Nancy was on the search committee. I remember getting a call after I had gone down and done my first interview. They had contacted the references that I had given, and then Nancy called and said, okay, we’ve contacted your references. I’m now going to go down a list of people and I want you to let me know what your relationship with any of them is so we can contact them. And she basically read me the list of all the AAHSL [Association of Academic Health Sciences Libraries] directors. All of them.

LF: All 137.

SP: Everyone that I had had any connections with. And, of course, there were people at UAB who were well connected to NLM, so they were making their own inquiries. The vetting that was done for me was *huge*.

And at the same time that this was going on, I was doing the same kind of vetting, driving her nuts. Because the thing that I would say is, if I take this job because I want to be with you and it's not the right fit, and I've made a mistake about the job, it's the end for us. It would be better for us to do this long distance than for me to come down here for the wrong reasons.

So, when we got near the end of the summer, I was pretty insistent about wanting to get married regardless whether or not we were able to live together. We were not planning on raising a family. We knew couples who had long-distance relationships. I felt good about the prospects for the job. It wasn't a done deal. But we decided to go ahead and start making our wedding plans even so. We had set the date and started to make the arrangements before I actually had the job. But then I got the offer, got the job, and then we had the wedding at the chapter meeting.

LF: Midcontinental in Kansas City.

RF: And it was in some ways the centerpiece of that meeting.

LF: We'd like to think so. Mark Frisse was the keynote speaker, as I recall. Because we walked in late to his presentation and we were the subject of public ridicule.

SP: Right, everyone was amused.

LF: It was the morning after our wedding [laughter].

SP: The way it came about—I'm living in St. Louis. Our friends are librarians and they're scattered all over. We knew that any family who would come would have to travel anyway. We were more interested in trying to get together with friends. We realized that we could get the license when she was visiting St. Louis and then we could execute the license a month later or whatever in Kansas City, Missouri, because we were living in the same state, with the added benefit that my band would be able to drive over and they could play for the wedding.

My initial thought was, the meeting was going to be a Tuesday-Wednesday-Thursday. We would go to the courthouse on Friday, have the marriage ceremony there, and then we would throw a party at the hotel that evening for whoever wanted to stay over an extra day. Knowing how much energy and effort people put into the planning of these meetings, I didn't want to just do that without checking with the planning committee. Bob Pisciotta, who I knew well, was on the organizing committee, so I called Bob and explained what we wanted to do. He said, "That sounds great, but we're having a meeting next week. Let me bring it up to the committee and then I'll call you back and just be sure it's okay." He calls me back the next week and says, "The committee thinks it's great that you want to get married in Kansas City, but we've already reserved this house for the welcome reception that a lot of people get married at, so why don't you just get married during the welcome reception?"

LF: It was Bob's idea.

SP: So we said, "Sure." It was in the program. The reception started at about six o'clock, and we came in through the house at about six-thirty and went out into the back. And everybody had a drink by then.

LF: I can still just see Wayne Peay on the little porch that looked out on where we were getting married with a longneck in his hand and thinking, this is the way to do a wedding. Get the reception started before the ceremony.

SP: There were probably—I don't know, Midcontinental is a small chapter. There were probably eighty-five, ninety people there. At least two or three hundred librarians claim to have been there.

LF: I would go to presentations and say, "How many of you were at my wedding?"

RF: Everybody would say yes.

SP: We had the wedding in Kansas City, I went back home, packed up my bachelor apartment, drove down to Birmingham, arrived in Birmingham on October [31st], which was a Tuesday, and started the next morning at the senior executive meeting at 7:00 a.m., and off and running at UAB.

RF: Really off and running.

LF: Nancy was so glad to see you on board.

SP: The key thing that I think I want to make sure is clear at this point—two years earlier, as I've said, I had been ready to bail on librarianship. What happened through this, getting connected to Lynn, I wanted her to be proud of me. And there are two things that have driven everything that happens that we will describe over the next several decades. There were two things that drove all of my efforts in librarianship. One was to pay off that investment from the National Library of Medicine, and the other was to make her proud of me.

LF: So far he's been successful, I think.

RF: He has done pretty well on both.

I think those are really good points to make in terms of your lives—what you value. I thought it was interesting when you were talking earlier about the choices and decisions that you had to make about bringing your lives together. But you both had a lot of personal integrity, so I'm not at all surprised to hear you say that you had to think very deliberately about how to do that appropriately. Because you had different jobs that could have created conflicts of interest, and you never allowed that to happen, very deliberately.

LF: Yes. You filed a statement with UAB saying that any decisions about so-and-so—and the state of Alabama would require state employees, of which you were one, to file an ethics statement. But our particular circumstance, which could clearly have been seen as a conflict of interest, was not one of the choices on the ethics statement.

RF: —that you had to declare.

SP: I worked out with my boss an informal declaration, because as I would say to people, it's not that our situation was an appearance of a conflict of interest, it was an actual conflict of interest, and so it had to be managed very carefully.

LF: Right. And it was, the whole time you were there.

RF: And maybe an inappropriate aside from me, but in a state with a long history of not worrying too much about conflict of interest.

LF: Yeah, no kidding! But you can pull that out if you want to get rid of somebody.

RF: But you two did the right, aboveboard thing.

Does it make sense at this point to talk more about you coming into [UAB] or go back to Lynn at EBSCO?

LF: I want to talk a little bit more about some of the early projects that I worked on, and then we can—

RF: Because you started a very different career directly. You moved over to EBSCO. And the things that you did there were not traditional librarian activities.

LF: Right, not very much at all. One of the first big projects that I undertook, and it was massive—it would take three to four months of my own time, of not doing anything, not traveling, just working on the *Index Medicus* Price Study. This had been an idea from Victor Basile of University of Medicine and Dentistry of New Jersey—UMDNJ. He had been talking to Phil Greene, who was the general manager of his EBSCO regional office—and they were pretty good friends—about trying to get a better handle on the pricing trends for the titles that are being indexed by *Index Medicus*. I went up and I met with Victor and we brainstormed a little bit. EBSCO had a massive—still has—a massive, massive database of data elements that no one would think to keep, but we had to because we were doing business with these people.

RF: And nobody else could have access to that.

LF: Nobody had access to that on that scale. I worked with programmers; at the time our IT shop was called DPSC—Data Processing Service Center. It was all amazing. And I'm working with a PC. The people in DPSC did not know from personal computers.

All they knew was how to program the mainframe. So, there was some back and forth on that to try to get it to translate to data that I could download to my personal computer and manipulate. They were great. We got fabulous cooperation from the programmers at EBSCO. We were able to sort and look at the whole collection of 3,000 or so titles in ways people had not been able to do before.

Based on my experience at Lister Hill, where, after you left, I was more in charge of collection development than I had been when you were there. And I was not in charge—I had more responsibility for collection development. I had taken Dan Richards' class, and he was like the god of collection development theory. I learned a tremendous amount just from that one MLA CE course. I learned about citation analysis and I learned about all kinds of things.

I decided what I would do was look at all of the 3,000 or so titles in *Index Medicus* and quite arbitrarily assign them to either clinical sciences or basic sciences. Basically, medical librarians had been telling me that they needed to get a better handle on what they were buying for the clinicians versus what they were buying for the more research-oriented—the labs, etc. Like I say, that was fairly arbitrary.

Every journal in *Index Medicus* I assigned a subject classification. And this was tricky, as I tried to explain the difference between a subject heading and a subject classification to my EBSCO colleagues. Say, the [*Chinese Journal of Medical History*], what is the subject classification. We've got China, we've got history, we've got medicine. Oh, yeah [laughter]. So, just to get that concept across—most of them did not even really understand the Dewey Decimal System, much less the various other classification systems. What's the difference between LC and NLM? What's this MeSH you keep talking about? I don't understand that. How does that work? Why is this MeSH term in two different—what's a tree? This whole long thing.

I published that from 1990 to [1998], at which point e-journals were coming in and it was becoming extremely difficult, if not impossible, to pin a price. In the print world, every library paid the same thing for the same title. In the electronic world, that was completely not true. That, coupled with the fact that I refused to sign my copyright over to Elsevier, that just kind of put the end to it. That's why I stopped doing it... EBSCO still published price studies, but they were on a broader scale.

I was there early in the days of email and had the second email assigned of any EBSCO employee, and it was lynn@ebsco.com. It's not that anymore. But that was new—email was brand-new. The World Wide Web started, and as Scott talked about, Mosaic—I said we have really got to start thinking about our technology and how we're going to manage this on the Internet. I think that EBSCO was the second commercial company to get access to the Internet because at the time it was strictly a not-for-profit.

RF: It was more of a university—

LF: Yes. But we got that because we dealt with universities so much and universities wanted to be able to do things on their own.

The longer I was there, the more I got involved with planning services that would help librarians with collection development and management beyond the *Index Medicus* Price Study. I did an awful lot with that.

And while Scott and I were denying our attraction to each other, EBSCO acquired Majors Scientific, which in medicine had probably been the premier vendor for medical libraries. Majors was also private and we dealt collegially with Majors. They came and they saw our fantastic computer setup and kind of came to the conclusion that they had an awful lot of catching up to do, so it might be better if they just didn't.

RF: Do the wiser thing and get out of the business.

LF: Do the wiser thing and get out of the business. We bought Majors and their client list and some other things. And it all had to be on the QT. I was on our acquisitions team, but we were sworn to secrecy. Because, again, these were private companies and you couldn't go out and start the alarm amongst the customers or they would all bail.

SP: Danny and his colleagues [at Brennan's Irish Pub] need to practice doing a little singing because they're doing a wedding on Saturday. I don't know if that will disturb us or not, but I don't want them to start [inaudible]...

LF: Okay, thanks. I spent a lot of time with you on the phone talking about what was going on after the acquisition was announced. I got an email from you. I said, "I'm working on a major retention analysis," and you said, "What in the world is a major retention analysis?" Because I had to see if this customer had spent a million dollars with Majors, were they still spending a million dollars with us or had it gone down or had it gone up? I had to do that for every single library, which was a lot. I'll turn it back over to you, because that's about when you started at Lister Hill. It was after the Majors acquisition.

RF: Before we do that, though, I want to ask you about one thing that you touched on earlier, Lynn, because I think that *Index Medicus* Price Study was really a critical thing for the profession. It was useful to everyone.

SP: You won the Dan Richards Prize for that.

RF: You and Victor Basile jointly won the first annual Daniel T. Richards Prize for writing related to collection development in the health sciences [sponsored by the MLA Collection Development Caucus]. I want to get that in the record because I think that that's important. It was quite an honor.

LF: It was absolutely a massive project that I'd begun to look forward to with more and more trepidation as every year went on. I was working at such a granular level, and I

didn't want to make any mistakes. Oh, the third reason that I kind of quit doing it, frankly, is because the publishers seemed to be even more interested in it than some librarians, because if this heart journal is going for this much and we're also publishing a heart journal, why aren't we charging a comparable price? I got a lot of calls about that. When I quit publishing it, they would call me and say, can you tell me what the price of such-and-such is? No [laughter].

RF: All right. Well, let's continue and see how it goes. We're going back to the point at which you just arrived at UAB and were thrown into your first executive committee meeting right off the bat.

SP: Yes. I arrived to a pretty traumatized staff. Lynn has described the circumstances under which she left Lister Hill. And there had been three years that Nancy had been acting director. It was during that time that the library underwent the planning for—in the beginning of—a massive expansion of the library that doubled the square footage. Nancy and Jack, their primary focus was on keeping the doors open, continuing to function, and dealing with the building project. Everybody else in the library was kind of hunkered down trying to do their job. They had been demoralized. They had gone through this time when the public services people couldn't talk to the tech services people, so everybody kind of had their defensive shell around them.

And I knew about that, fortunately, from Lynn telling me the history. Nancy and Jack were able to be very open with me because they trusted Lynn. Many new directors walk into very difficult situations blind and end up making mistakes, because they really don't know what they're walking into, because, of course, the search committee always tells them what a great place this is and what a wonderful job they've just gotten. I was very fortunate that I really knew what the reality was.

I had learned from Judy, as I described, the importance of group process and the importance of really working with the group and doing the training and taking the time. I had learned from Braude the importance of respecting everybody who worked at the place and treating everybody equally and openly. So, I was very, very focused on all of those human interaction pieces and I knew that it was going to take a long time.

I didn't come in thinking I was going to implement all of this great, new, fabulous stuff—again, the kinds of things that we in our collective careers have seen so many of our colleagues screw up, because they go in and they've got all these great ideas and now I'm the director and I can just make this stuff happen. I knew that what I needed to do was to listen and to learn and to observe and try to figure out what people were good at, what they weren't good at, and how to make the changes that would hopefully make everybody as effective as they possibly could be.

In a way, it was challenging for some of the people, because they were so unused to having that. You had talked about what a great participatory manager Dick Fredericksen was. Well, that was way in the past. They hadn't had that in a long time. So, to have somebody who genuinely wanted to know their opinions and was not going to use that as

a weapon against them later on, that was new and that was scary, and how do you trust them? And I understood that, and I think this is part of the change from what I didn't know when I started at SLU to what I knew when I came to UAB. I didn't expect to be trusted. I understood that that was something that had to be earned and built over time, and I was willing to take the time.

RF: You were willing to be patient, as the staff needed.

SP: Yes. One example of it fairly early on that, as I was going through my notes I wanted to mention, we had at the time—and again, as you guys were talking about how innovative Lister Hill had been with technology, that had certainly continued. When I got there, there was a microcomputer lab that had been set up and was run by the Lister Hill IT guy. There were now a bunch of computers around the reference desk, but they were very separate. The computer lab computers were for spreadsheets and word processing and programming, and the reference desk computers were for searching MEDLINE and whatever, and never the twain shall meet. In the renovated library, there was actually a whole room for the microcomputer lab. We had something like thirty PCs. So, if you were a student and you needed to do some MEDLINE searching, you did that in the reference area on the reference computers, but then you had to go down to the microcomputer lab if you were going to do your word processing.

Tim Brown, who ran the microcomputer lab, and the reference librarians who ran the reference side, they all thought that this was just fine. This is the way that it should be. I put together a little working group and we spent six months talking about all the pros and cons, looking at what other people were doing, talking to the students, etc., etc., etc. And at the end of six months, the group decided that it really made sense to make all of the different applications available on all of the computers.

Tim came to me after that and he said, “You knew that’s what we were going to decide, didn’t you?” And I said, “I didn’t know, but I was pretty sure.” He said, “Why didn’t you just tell us to do that instead of taking six months?” and I said, “Tim, if six months ago, I had told you that that’s what you had to do, what would you have done?” He said, “Oh, I would have fought you every step of the way.” And I said, “And now you’re in charge of making it happen” [laughter].

RF: Because you understand why.

SP: Right. So that was the approach that I tried to take. Sometimes I was successful, sometimes I was impatient, sometimes I pushed too fast, sometimes I took too long.

I think of my time at Lister Hill in these four- to five-year blocks, and the first block was just building trust. And then the second block was taking that trust and starting to build a team. That’s when I was able to bring Gabe Rios when Nancy retired. I brought in Liz Lorbeer. Mike Flannery had come in for the Reynolds [Historical Library] during that first [block]. Pat Higginbottom, who had been a brand-new reference librarian when I arrived, had come up through the ranks. And so I had this really great senior team.

Most of the rest of the library staff was on board. I would say we probably had 20% of the staff who were still disgruntled and suspicious but were willing to go along, and probably never more than four or five out of the forty-five or fifty people who were really sort of actively antagonistic. I thought that that was extremely good for an organization of that size.

I would tell people when they would come in to interview that one of the things that you need if you're going to be at this library is you need to be comfortable with ambiguity—because on any given day, if you talk to the people who work for me, they're going to tell you, he's brilliant and supportive and innovative and risk-taking, and it's really great, and then the next day they're going to tell you, I have no idea what he's thinking, I do not know what we're doing, I cannot figure out what's going on.

LF: He's arrogant and manipulative.

SP: Right. So, if you're looking for a position where it's very clear what your responsibilities are now and are going to be into the future, you will not be happy here. And we kind of knew what to look for as we put that together. The technology continued to be a big deal.

Terry Hickey, who was now associate provost—because we had moved from a VP system to a provost system—had made sure that there was one position in the library that was funded for just kind of emerging technologies, education technologies. I had a really smart computer guy who basically could do what he wanted. He set up the first www.uab.edu. Nobody else in the institution knew anything. We set up the first web server and we started making the rules for UAB's web presence back in '96, '97, because nobody knew any better. And we had the technology and the freedom to kind of do stuff.

When Y2K came up and people were freaking out, one of the things about UAB at the time was that central computing ran the administrative systems, so there was no general academic computing. Every department was on its own in terms of local networking, support for PCs, whatever they were going to do, so every school or department was doing its own thing. Because we had some real expertise in-house, we started kind of helping out other departments.

[WAV recording 3]

RF: This is a continuation of the interview with Lynn Fortney and Scott Plutchak in Birmingham, Alabama, on January 9, 2020. Scott, when we took a break, we were talking about the common situation in academic health sciences centers where there was a research community, but oftentimes there wasn't a core of academic computing available on the campus. And you were talking about how Lister Hill moved into that void.

SP: Right. We had a couple of good, smart people. I had good relationships with the various deans. The deans of nursing and health professions—whose buildings were across the street from Lister Hill—had a joint learning resources center that supposedly ran computing for those two schools. And they had lost an employee. They didn't know what to do. They turned to us. We came in, helped them recover some things, and started to kind of restore their systems and their operation. The deans ended up asking us if we would be interested in running desktop support for them. I worked with Tim to figure out what it would cost for us to actually do it, and I made a proposal to the deans, and the dean of nursing in particular started to negotiate with me on the price. And I said, "If you can figure out a way to get this done less expensively, by all means you should go ahead and do it, but if we're going to do it, this is what it's going to cost."

RF: And you didn't have a huge profit margin built in, did you [laughter]?

SP: No. What I had built in was what we figured it would cost for us to do it comfortably. And since it wasn't our responsibility, I was able to set those terms, and there wasn't much she could do but accept it.

Over the course of the next year or so, that operation expanded. I think at one point we had seven or eight computer guys doing desktop support for several schools and departments across the health sciences center.

LF: It was just health sciences.

SP: It was just health sciences. At the same time that that was going on, UAB was finally attempting to hire an actual vice president for information technology, and I was on that search committee. We finally hired that person, and after that person had been in place for about a year, we ended up transferring that operation over to him. We had done the same thing with the web server, which, once we got that up and running, the administration set up a central web office and we transferred that responsibility. We did the tech support for the first online course, which was an executive master's out of health professions. We spent a couple of years doing a lot of tech support as various schools were setting up their online courses. And again, as that got bigger, we were eventually able to spin that off into its own unit.

So, a lot of the technology stuff, we were the incubator. We would be able to forge ahead on things where people didn't really know how to approach it, because I had sufficient resources and talent to be able to do that. And then once we got something up and running to a particular level, then we could transfer it out. And the thing that I liked about that is while we were running it, it was never officially our responsibility, so we could—as I'd done with the dean of nursing—we could say, if we take this on, these are the resources that I would need to do it. So, we didn't get stuck, as so many IT support [units] do, with having more responsibility than you have resources to manage. I think that was a comfortable situation for us.

RF: Did you get good credit on campus, good credibility?

SP: Yes. And I think that was part of the switch from when you guys were at Lister Hill and what we were able to do at Lister Hill. You had mentioned earlier that although there were really innovative things going on inside the library, you felt that you weren't really being recognized for it outside. And I think in large part because our team was actually out there in the schools, and we were interacting with the faculty, who were trying to set up their own online courses. We had a level of visibility and connection with the technology, and so we were really recognized as *the* spot for high-tech stuff.

RF: The early days of automation at Lister Hill were more internal.

LF: They were almost exclusively internal... They were invisible. They were only visible when they caused problems, [when] they didn't work. And when you and I were at Lister Hill, Rick, we didn't have any kind of an outside-the-library, PR marketing focus to let the community know what was going on. And again, that was kind of a shift in librarianship in general. We were just supposed to do your thing and people would notice, and it's different now.

SP: I think along those lines, the one other thing I wanted to mention about the IT thing—which was kind of great for me—so as these positions spun out, it was almost as if, throughout what became the official university IT operation, I had these moles. Because the people who had worked for me at one time, who were now out there... So when there were things I needed to get done that were a little bit outside the normal processes and procedures, I knew who to contact in order to get things to happen. And I always was happy to use that.

A couple of things that I think are important to mention about my situation at UAB that really set the ground for a lot of the successes that I was able to have. These are things for which I had no responsibility; I was just very fortunate. The library directors reported to the provost on the same line as the deans. Although we had director titles rather than dean titles, we were treated—and had all of the same financial and budget and decision-making authority over our units as the deans did. Our librarians were faculty—we were [not] tenure track, but the librarians were faculty. They had all the rights and responsibilities of participating in faculty governance. We were viewed as faculty colleagues within the schools.

My budget authority was what I thought of as bottom line. Basically, I got a bag of money, and as long as I didn't run out at the end of the year, I could do whatever I felt I needed to do with that bag of money. If I felt it was reasonable to move money from the personnel budget into operations, collections, whatever, I had complete flexibility to do that. I didn't have to ask anybody's permission; I didn't have to go through any—. There were some paperwork things that my finance person had to do just to keep track of stuff, but I never had anyone that I reported to demanding long justifications for the things I wanted to do. They would occasionally ask questions so that they understood what I was doing, but it was always with the understanding that those were decisions for me to make. And I would much rather be in a situation where I had that kind of freedom

for decision-making, even if I didn't have as much money, than to have a lot of money but have a lot of strings on it in terms of what I could do. And again, we all know that that kind of flexibility over budget and that kind of position within the senior leadership is extremely rare.

I know through AAHSL—and we'll talk some about AAHSL—so often, the discussions there were, how do you get a seat at the table, and I had a seat at the table. It was expected. I was a member of the council of deans. So, the issue for me was not, how do you get a seat at the table, but what do you do with that.

RF: And as you say, the budget flexibility isn't always there, but it's so essential in a time of significant change when you need to reallocate resources.

SP: Yes. So I think we were able to do a lot with the resources that we had because we had that flexibility. I think the other thing—this sort of relates to what we were just talking about in terms of visibility and marketing—is we were able to really make a big push with that. And I ended up with two people. Pat Higginbottom, who was the associate director for public services, and Valerie Gordon, who was the head of cataloging and the staff development officer, really started focusing on marketing in a very, very strategic way. This was light years beyond, let's come up with some funny pencils and bookmarks to hand out and see if that does something. They really went through a rigorous process every year where they looked at our different clientele—faculty, students, research, clinicians—and asked, what is the message that we want to focus on giving them this year. How did they like to get information; who likes to get it by email; how do we reach out to this group; how do we connect with this group. And they would set up a very specific, detailed plan that we then executed over the course of the year. And that made a huge difference.

And lots of little pieces that were strategic. Pat was good at organizing events for the students. We ended up renting a popcorn machine a couple of times for some sort of event. And Pat came to me and said, "You know, if we bought our own popcorn machine, we would save money over time."

LF: How many libraries, much less medical libraries, have their own popcorn machine?

RF: But if you're going to use it regularly—

SP: But it made sense.

LF: Just the aroma alone is going to bring people in [laughter].

SP: Again, I had budget flexibility; I had resources that I could do something with that. But I loved that kind of thinking: What can we do? How can we make things fun? How do we connect? How do we create that engagement? And I was tremendously proud of the fact that when we went through the LCME [Liaison Committee on Medical

Education] process in 2013, the student self-assessment put the library and their relationship to the library at the absolute top of all of their resources. We were golden.

And it was because of having really, really bright, really good people. I would always say, and this is very true: None of the successes that we had, of which there were many, were things that I did. The bit that I did was essential, because it was helping to create the environment that enabled these smart and creative people to go out and be smart and be creative and be innovative and be supported.

I used to say that whatever successes you have are your successes, and I will make sure you get the credit. If things blow up, I will have your back. And I would say, that's what every boss says. That's what you want your boss to say. It takes a long time and it takes evidence to see that that's true. And by my last five years, there had been enough that had gone on that people knew that that was the case. They didn't always have to agree with me, but they knew that they could trust me.

One of my favorite stories—this came back to me through a third party—we were getting ready to make a major shift in how we handled some interlibrary loan stuff, and Pat was talking to the woman who was going to be on the front lines of actually [implementing the change]. And she was nervous, as you would expect her to be. They're going through the details, and she says to Pat, "But what if this all blows up on us?" and Pat said, "That's okay. Scott will take care of it." Pat didn't have to check with me on that and she didn't even have to tell me that that conversation had happened. I found out about it thirdhand months later. But I think that kind of attitude permeated far enough through the staff that it gave people the freedom to try stuff out.

RF: Without having to worry about repercussions. And that's huge. That's a huge gift to your staff.

SP: Yes. It enabled us to do a lot of stuff. And I could go on and on about the various things that people were able to do, but I think it was because we were able to create that kind of environment.

I think what crystallizes it for me and the thing that I am really, really proud of is, in that last five, six years, whenever we were interviewing for a faculty position—and we would usually do a two-day interview—and I would be the last interview block, and I would have seen a presentation and I would have met them before the final wrap-up with me—the last question I would always ask was, is there anything about your time here that surprised you. And those last years—and I would say the last five years—every single person—whether it was somebody we ended up hiring or not—said the thing that surprised them was that there was so much energy and there was such a feeling of creativity and working together among everybody they met, and that's what really surprised them.

I felt that if we had gotten to the point where we had created an environment where, if you came in for an interview and that was the thing that stuck with you over and over and over and over, we had really created something special.

LF: And it doesn't ever happen by accident. It takes years to get there and it takes four to six months to destroy it.

SP: Right. But I think that's what I had learned, again, from people like Bob Braude, people like Judy Messerle, is that if you invest in people that way and if you give them the resources and build the trust and build the environment that gives them the freedom, they will go off and do great things.

The other last little example that I want to give—because, again, this is so much fun for me—everybody in medical libraries in the mid-2000s, early 2000s, was trying to figure out how to really get our librarians out of the library. And many people had these sort of traditional liaison roles where, if you were the liaison for so-and-so, your job was to tell the faculty of that [group] what the library could do for them.

So, when we finally developed our liaison [program]—we spent a lot of time thinking about it and trying to figure out how to work it, and being very strategic; we had a very serious strategic management process—we finally set it up. And one of the things that I emphasized is, when you're going out there, your job is not just to tell them about the library; it's to find out what they're interested in. It's to build those relationships. It will be difficult to buttonhole a faculty member and get them to spend fifteen minutes listening to you talk about the library. It will be easy to get them to spend thirty minutes telling you about the work that they're doing.

RF: That they're interested in.

SP: And you will get more out of that. We had mixed successes, because some of the librarians were more comfortable with that approach; some of the librarians had a lot of trouble with that approach. But my favorite little marker is, we hired this bright, young guy who had just graduated from library school in Tuscaloosa. He came and joined us—and this is probably '06 or '07-ish. And he was assigned as liaison to the School of Nursing. At the time, I was parking in the lot behind the School of Public Health across the street, so I would come in to work every morning and cross the bridge that goes over University Boulevard towards the library, which—there's the School of Nursing on one side. And as I'm walking across one morning, I see Paul [Mussleman] walking the other way, and he's got this basketful of stuff. And I say, "Paul, what is this?" and he says, "Oh, it's National Nurses Week" or whatever, "so I'm bringing some stuff over for the nurses' coffee hour" or something like that.

LF: Treats and snacks.

SP: Treats and snacks and stuff. And on he goes. And I'm thinking, that's what he thinks a reference librarian is supposed to do. He doesn't know any better. And seeing

that—and again, building an environment where a bright young reference librarian thinks that his job is not to sit behind a desk and wait for somebody to ask a question, but to go over on Nurses Day and bring treats, to hang out with the nurses, and talk about what they're interested in so that they will be inviting him to participate in their courses and connect with them. And that was great.

I think that hits most of what I want to [say] about UAB except for the way it ended, and my entry into the digital [data]. So I don't know if you want to do more with Lynn at this point—

RF: Yes, we can do that. Lynn, let's come back to you then, and your time at EBSCO. We've touched upon a number of aspects of the EBSCO experience and that environment and how different it is from an academic library. But I know in the scope of the years that you were there, which was a pretty long block of time, there were other significant things that came up that I know are worthwhile adding to the record.

LF: How many days do we have [laughter]? No, seriously, because we're now talking about the early 2000s, when things globally just really started changing. And I do want to go back to a point that I really want to emphasize that I hope I will be remembered for. When I went to EBSCO, there were some librarians who had gone off to work for a vendor, and they were vendors who used to be librarians. I was determined that that was not going to be the nomenclature that was going to be applied to Lynn Fortney. I wanted to be the medical librarian who happened to work for a vendor, but a medical librarian first and a vendor second. Because I wanted my community to understand that I was on their side and that I was trying to translate what they needed to what the company was capable of, and then translate to the company what we needed to do to provide better services for the medical library community.

With that said, some of the other things that I encountered—that we all encountered, all of us—were the rise of integrated library systems [ILS]. Fortunately, I had early adoption with the Georgetown system. There were not a lot of other libraries that had integrated library systems at that point, so I was really familiar with the complexity of bringing a system like that up.

And then, of course, on the EBSCO side, our technology, and our technology expertise, was really growing. We had, as I mentioned earlier, with the *Index Medicus* Price Study, a tremendous amount of data and information on the serials that librarians were subscribing to that we would be willing to share if we could figure out a technological way of doing that.

We worked on integrating what we could do with the various ILSs out there—and there were probably fifty or so, all of which had different standards, all of which had different ways of managing the data. And we were developing, like, fifty different systems, so that we could interface with the various ILSs out there. And then explaining all of that, knowing, if you went into a Sirsi library to talk about this, if you went into a library that used this other system, you had to talk about that. And making it clear that EBSCO was

really—and this is so British—a really bespoke vendor. We have lots of different ways of doing things, but just because I talk about it this way doesn't mean that we can't adapt it for the way that you need it to be done. And that was really important.

As EBSCO grew, some of the companies that we would consider competitors did not, and the Faxon bankruptcy was a big deal for everybody because Faxon had been purchased by not a venture capitalist, so to speak, but by an outfit that really didn't understand the subscription industry or the subscription service industry. The money was grossly mismanaged because they didn't understand it. Faxon really got into deep, deep, deep, deep financial trouble. We at EBSCO could see the handwriting on the wall because we had people who were watching their financials—and I believe they were publicly traded at the time. We could see they were going down the tubes, but the library community did not, because librarians did not have a practice of investigating the financial stability of the company with which they were probably spending a million, two, three million dollars.

And when that happened, that was a real crisis, and I was quite wrought up about it. We did a lot of talking over the dinner table, nothing that he couldn't know because it was confidential. But I think I taught you a lot about how the business worked. And my plea to librarians is, pick EBSCO or not, but you have got to look at the competitors' financials while you make your decisions. Because just because they're offering what seems to be the cheapest price, you can send them all your money and then there isn't anything. So that was a big deal.

During the 2000s, we started to see electronic journals and full-text databases. Full-text databases came with embargoes and the librarians trying to decide, well, I can get this particular title with this particular full-text database, but it's got a six-month embargo, so then do I also need to buy a print subscription or access to the current e-content, or what?

And again, I think librarians did not—and I don't know, if I could go back in time, how I could change things—but to the general populace, the librarians are doing all the linking and the buying of the electronic journals, and the faculty member goes in and says, "Hey, it's on the Internet. Why do we need the library?"

RF: For free.

LF: For free. It's all on the Internet for free. And I gave many presentations on what actually was on the Internet. Just because you see an article title does not mean that the whole article is available on the Internet. I remember doing that one in Georgia, where I had all the charts and graphs and everything, and the first question was, "Could you come and talk to our administration?" And I'm thinking, no, this is why I'm giving you the information, so you can go give the information to your administrator!

It was a rough time. It was a rough time for EBSCO; it was a rough time for medical libraries. A lot of hospital libraries closed, not solely because people thought it was all free on the Internet. But I would read what I call the contact reports from the sales

representatives who were out there in the world. Every time a sales representative from EBSCO had a visit with a medical library or medical librarian, they had to write up a report, which I read every month. It was very tedious. That's another way that I kind of kept up with trends. You could see the comments that were being made—why do we need the library, because somehow it's just magically all there.

This was another thing that was kind of interesting about my job. When I was at EBSCO for the first twenty-two, -three years, there was the Subscription Services Division, which was the cash cow, and it was headquartered in Birmingham. We had nine regional offices in the United States at the time I was there, and then probably an equal number in Europe, Asia, New Zealand, and Australia. Not a lot of activity in Africa, but we did have an office in Johannesburg.

We were going to use our systems with EBSCO Publishing, which was the database component located in Ipswich, Massachusetts, and I probably liaised more with Ipswich than anybody on the Subscription Services side because medical librarians are so database focused. I did a lot of work with MEDLINE and trying to teach them about natural language searching, which is what the doctor's doing versus MeSH-based searching, which is what the librarian is doing. And of course, Ovid was eating our lunch because they had a much better search engine.

Tim Collins had been focused on the more general kind of library, the public library and the academic library, and I could see his business decision. But once he kind of got that market saturated, then he started noticing that there were things that could be done for the medical library community. I don't remember exactly—it was NAHSL, I think—North [Atlantic Health Sciences Libraries] Chapter of the Medical Library Association—where I saw DynaMed for the first time. I brought it to Tim Collins' attention and said, "I think that you ought to take a look at this because I think that there would be a place for us." Brian [Alper] was the guy who created DynaMed. And Tim did, and look where DynaMed is today. Good grief. I got a dinner out of that. The two of us! I think you were there with me.

SP: I knew of Brian and DynaMed because Brian had published an article in the *JMLA* [*Journal of the Medical Library Association*] when he was developing DynaMed and the theory behind it.

LF: Yes. It was an amazing system. It still is an amazing system, but he didn't have any capital and EBSCO did. EBSCO was able to come and really build that up, which is the genesis of EBSCO Health. They spun off several databases. We bought CINAHL—which I did a happy dance over that. Really improved the search engine and now there are, like, five flavors of CINAHL depending on how much money you have.

Being able to link the information at the citation level over at EBSCO Publishing to the actual content of the e-journal, which is being managed by EBSCO Subscription Services, was a real trick and a real feat. Early on, we got with NLM to be able to enable

LinkOut from PubMed directly to their EBSCO [content]. So that was huge, particularly for hospital librarians, because they didn't have time to try to get their LinkOut to work.

Then it started to be e-packages, and you've got to go to Springer for this and you've got to go to Taylor & Francis for that, and you've got to go to evil Elsevier for this, and you couldn't pick and choose the titles that you wanted. A hospital librarian cannot possibly imagine how much the Elsevier ScienceDirect would have been. There's just no way. I worked on a project with Elsevier to try to develop little baby packages. So, here's a little package for nursing titles; here's a little package for pediatrics titles. And we did that for a while. That was moderately successful, but Elsevier wanted to do their own thing. But it was a good experience.

At the same time, open access was a big bugaboo, because if it's not all free on the Internet, it should be all free on the Internet. So, what are we going to do about that [laughter]? I don't know. I did a lot of presentations on open access, got to know Mark Danderson at the *New England Journal of Medicine*—he was one of the first ones who was trying to explain to the library community. And that was because of me. *New England Journal of Medicine* was a valued partner with EBSCO, came for their visit, and I was invited in. At this point, *NEJM* had gone to an e-journal, but—

SP: There was a period of time in which *NEJM* surpassed Elsevier in the disdain with which they were held by librarians, because they came in late to the e-journal thing and their initial offering was: five individual workstations in the library could access it electronically [under an institutional license].

LF: They were clueless, because 97% of their subscriptions were to individual physicians, so only 3% of their subscriptions were going to libraries. They were afraid that if they made it freely available to everybody at the library, they were going to lose all these individual personal subscriptions. I'm sitting at the meeting in the conference room. I can just see Mark Danderson. And I said, "You have really ticked off the medical library community. Believe me, you do not want to do that, because unlike the academic library community, there's not many of them. They're very closely knit. They're all mad at you [laughter]."

RF: It was a serious misstep.

LF: It was a serious misstep because they misjudged the whole thing. And that's when Mark and I became friends—I introduced him to you. He came in and did presentations for the CONBLS [Consortium of Southern Biomedical Libraries] group.

SP: Well, you're jumping ahead.

LF: I'm sure I am. Go ahead. I like to jump.

SP: What I recall is that you encouraged Mark to set up an advisory group [*NEJM* Library Advisory Board].

LF: I did.

SP: And Mark reached out to me about the advisory group because I had been a very vocal critic of what they were doing. Mark, to his credit, and I think out of your advice, worked really, really hard with his bosses at *NEJM* to say, this needs to be real. We can't just bring in some librarians and force-feed them some stuff and expect that they're going to go out and deliver our message. That first group, I was on there, Liz Lorbeer was on there, Phil Davis—who was not medical but was very well respected in the academic community—was on there. I forget offhand who was on that first group. The first time that we met, they just gave us a bunch of real information.

When you talk about their concerns about electronic licensing, they had looked at—and they had the data for UAB, for example, how many subscriptions are actually going to UAB addresses, how many subscriptions are going to the zip codes right around UAB, which we can assume are probably affiliated with UAB. How much revenue is that? So, if we come out with a package at this price, which sounds like a lot of money, we are putting two or three times that at risk.

RF: And can we make it viable?

SP: Exactly.

LF: Right, right. And 'viable' was a word that was used in every other sentence [laughter].

SP: And they were so open and clear and really listened. Mark set up a process where we were really able to push back. I think it was out of that experience with the advisory board that you had made that connection, I made the connection.

He started coming to the MLA meetings but not just as a vendor. They had a booth, but he would go to sessions and they would start to get involved. And over the course of the next couple of years, they were able to completely turn that relationship around.

LF: Yes, it's all about understanding the community that you're trying to reach, and that's what I had been doing. With all of these chapter meetings and MLA annual meetings, etc., that I attended, I didn't stand in the booth. I went to the sessions, I talked to people, I listened to what they were talking about, and took that back. And I think that's what made us as successful as we were.

RF: And I think you characterize it correctly in that *NEJM* looked at their customer base and their revenue, and they forgot about the little segment that was the libraries, without thinking about the role that we played vis-à-vis those other subscriptions.

SP: Right.

LF: Because they never had to do.

SP: And the reverse was the same: [to] the librarians, they were another publisher, and how dare you expect us to pay that much for the license. Because we had no understanding of their business.

RF: Totally. Both ways.

LF: Yes. I'm afraid that's probably still the case. I long ago quit subscribing to LIBLICENSE, but I'm sure that the debate goes on and probably will forever. Because any time you have a market that needs something, here's an agency that can provide it, and that's a natural tension right there.

SP: Those are all issues that I'm still thinking about.

LF: Yes, I know. Good for you. You have at it, boy. I do want to mention—again, I did a tremendous amount of public speaking. Much of it was EBSCO related. A good portion was not; it was just, oh, let's get Lynn Fortney to speak, primarily because EBSCO would fly me someplace and they didn't have to pay for my transportation.

RF: But you were talking as Lynn.

LF: I was talking as Lynn, right, and I was talking as Lynn about something that Lynn understood from her business background but could relate it to librarians in a way that they would appreciate why this information might be useful to them.

The first time I was invited to speak at the LIANZA—Library and Information Association of New Zealand Aotearoa. And they said, "Well, if you're coming over to speak at LIANZA, why don't you go on to Perth," which is where the Australian Library [and Information] Association was meeting, and the distance between Perth and Auckland is probably the distance between L.A. and London [laughter]. It's just huge. I flew all the way over to Perth, called you on the phone. I figured out the timing. And you said, "What day is it where you are?" "It can't be any more than twenty-four hours away from where you are." I did not, as I recall, have a speaking role at that meeting, but was doing more hanging around the booth just to introduce myself.

But I did have a speaking role at the LIANZA meeting. And it was one of the more bizarre meetings, although not the most—where it was at a horse racing track. The meeting venue was a horse track. The room that I was giving the presentation in was a viewing room for the horse track, and I had all these slides and things, so of course they were all washed out because there's lots of light coming in. And it was a panel discussion. I had long since learned that what we considered to be a panel discussion in the States might not necessarily be the same thing wherever else you might be. I get up and do the presentation as best I can. There was one poor New Zealander/Kiwi librarian, who thought that the panel discussion was, we're all going to sit there and have the audience ask us questions, and he had nothing prepared. I felt so sorry for him.

The next year came around and they said, could Lynn Fortney come and speak on electronic journals. You and I went over together at that time. That was a lot of fun... That was the meeting where—I'll shorten this—the plane was badly, badly, badly delayed. The meeting was on the far southern end of the southern island. I'd left my laptop peripherals in the car because we were late to the plane—because that's me. We get to L.A. or wherever it was, and that plane was delayed. We get to Auckland; that plane was delayed.

I was supposed to do a presentation because EBSCO was introducing EBSCONET, which was our old legacy system, to the [librarians] of New Zealand, and I was going to do an introductory talk about that—how it worked and why it was useful. So that was an EBSCO talk.

I call ahead and say, "I've already sent you the slides, so Mary [Wu] is going to have to do the presentation because I'm not going to make it." Mary had never laid hands on EBSCONET so she didn't know EBSCONET. She was the sales rep over there. Peter [Smith] was the general manager. So, this is a big relief. We know we're going to get there. I get very comfortable in what I'm wearing. Scott and I come down the escalator in the airport and there are Peter and Mary at the bottom of the escalator. And I said, "What are you doing?" "Well, we moved the presentation and we're taking you right to it."

RF: You're on!

LF: I'm on. I had on no makeup, no lipstick, no brassiere—just kind of threw a jacket over the long black dress I was wearing. And because I didn't have any peripherals, my laptop was probably not going to work because we didn't have the right connections. Well, I did it as far as my laptop had the power to go and then when it died, I just continued on, because I knew the presentation by heart.

Then I did the Lynn Fortney presentation later on. The third time we went, I don't remember—it was in Auckland, I guess. And they said, "Could Lynn Fortney come and talk on anything she wants?" And that was a lot of fun. I was very proud of that.

It started to be kind of a package deal. If I was going, I would let the organizers know my husband was accompanying me, and they would get him to speak. We did a couple of dual presentations in Australia because you were there. He was a big draw, because at this point, you were editor, I think.

SP: Yes, I was the editor of the *JMLA*. This was sort of the middle of my two terms as editor, so I was increasingly well known in the library community.

LF: You were my bait [laughter]. Here's Scott Plutchak.

The weirdest one—and you know where I’m going and if you disagree that this was the weirdest one we’d ever been to... We had been introduced to Professor Kaputnsnik of the Central Medical Library in Warsaw, Poland.

SP: Let me make one [interjection]—because this now goes back in time. Because the Australian presentations are 1999, early 2000s. What she’s about to go into is 1996, so it’s just after we got here. This is before I’d gotten to do the *JMLA* and whatever, so I am not as well known. But Lynn’s reputation is really getting up there because EBSCO’s been having her travel around. We’d made a couple of trips to Europe by this time.

LF: Right. The Soviet bloc has been dissolved and Professor Kaputnsnik in Poland decides it would be a dandy idea for the various Eastern European communities to all get together, despite the fact that they had no common language. I’m invited to be a keynote speaker because I’m going to talk about all the wonderful things that MLA is doing and the development of health sciences libraries and how they’re organized.

SP: This is essentially the chief medical librarians of all the former Soviet bloc countries to come together for what they imagine is a Western-style academic conference.

LF: They imagine. Their version. We get off the plane in Warsaw, we are met by a representative from the library whose driver has completely disappeared. She is furious. We somehow get to this creepy hotel, their idea of elegance. Scott is talking about, “I hope we have a decent Internet connection.” They had hard-wired phones that looked like they were from Russia. They probably were. So, there was no kind of connection at all. We’re starting to unpack. My presentation is supposed to be—

SP: We had been invited to do thirty-minute presentations, and so when our hostess had picked us up, she had given us the preliminary programs. We had actually had to write papers and send them ahead, so the presentations were all printed up in this little booklet. And I’m looking at the program. Lynn is unpacking, and I said, “Lynn, they’ve got us down for fifteen-minute slots.”

LF: Thirty-minute presentations, fifteen-minute slots. How does this work?

SP: So, we spend an hour or two that evening looking at our presentations and figuring out how to cut them back to fifteen minutes from our thirty-minute presentations.

LF: Because we were not told, nor would we have known, that their idea was that you would just get up and say what your paper was about and then sit down [laughter]. You wouldn’t give the presentation. It was in the printed program.

SP: Because there are all these different languages being spoken. So, we get into this very elegant ceremonial room.

LF: At the Central Medical Library.

SP: The professor gets up and does an introduction in Polish, looks around expectantly, and we realize he has introduced Lynn. Lynn gets up and goes over and starts to deliver her now-fifteen-minute talk, and everybody in the audience starts chatting among themselves.

RF: Because they don't speak English.

LF: Yes, they don't speak English. So why would they listen to me? I have this long, narrow, acoustically challenged room that I'm trying to talk among the general din and still maintain my composure, and I didn't have any kind of slides or anything like that.

SP: No, no, we were smart enough to do that.

LF: I think, okay, this is particularly strange. Now, Professor Kaputnsnik was very gracious and everything, but there were a few little pieces of information they hadn't shared.

SP: She finishes and I'm up next—I know that I'm going to be next on the program. And before I get up, the professor whispers to his deputy, and his deputy, who speaks very good English, gets up and says that what they're going to do now for the other English presentations is they'll do alternate translation, done by young Christophe here, who looks like, oh, my god, I'm going to Siberia. As I'm walking up to the podium, I'm realizing my thirty-minute presentation, cut down to fifteen minutes, is now seven and a half minutes. Christophe is sitting down here, I'm standing at the podium. And I'm talking about IAIMS [Integrated Academic Information Management Systems]. I have my presentation, he has the booklet. And so I point at a sentence and I look at Christophe, and I read that sentence. Christophe translates. While he is translating, I look down and I find another sentence that kind of relates and I can skip to it, and I point to that sentence, and I read another sentence or two or whatever. Christophe translates, I go through, and that's how we get through the fifteen minutes of my presentation.

As this is going on, and I'm looking out at the audience, there are two men in the front row who have great big deer-in-the-headlights looks, because they are the other two English speakers. They are Tony McSeán from the British Medical Association and Bruce Madge from the British [Library], neither of whom had bothered to look at the program to realize that their thirty-minute time slots were now fifteen-minute time slots. And Tony had overheads. And there's more fun stuff to talk about with that meeting but we would end up taking the rest of the evening to tell you those stories.

LF: Well, suffice it to say that it involved an extremely large bonfire in a Polish forest and extremely large and plentiful mosquitos, and no bathroom facilities [laughter]. And in the end, a lot of vodka. It was an extremely memorable—and a good lesson that if you are in a different culture, try to get it straight what the deal is with these so-called American conference models.

That's all I'm going to say about [EBSCO] other than, oh, yes, e-books. They're out there. As I was departing EBSCO, their e-book program really started to blossom. Again, that's not so important to medical librarians, although there was some good stuff in the e-book collection. But that was a really burgeoning thing. Almost any information resource in any format by the time I left, EBSCO was able to [handle it].

RF: What were the most important, most satisfying things for you in your time at EBSCO?

LF: Well, other than the fact that I increased business by, like, 187%—actually more—I haven't done the math—I learned a lot about business. A young certified public accountant joined the staff about the same time I did, and we were on an equal track. To tell you the truth, I don't even remember Allen's first job, but Allen [Powell] eventually became my boss. I learned an awful lot about finance and how to predict and forecasting from Allen. He in turn was a very attentive student about libraries. If he had a question about "How do you think the library community would react to this?" or if he was writing a piece—and he was a pretty good writer—for *At Your Service*, which was our librarian newsletter, he would always take it to me to say, "Is this how this would be said?" And it's just an ear that the three of us sitting in this room have, but that is not how a librarian would say this, and I would say, "This is how it would be understood better."

That was very satisfying, working with so many of the really dedicated people who were so gracious—men and women. There were far more men at my level than women, of course. And a man who had joined told me, "You have no idea that your culture is so cultured, because other places I've worked, it's much more rough-and-tumble, and there's the misogyny, etc." I'm not saying it didn't exist. There were some times when I took issue with Dixon Brooke, for instance, inviting all the men off to do something and the women were not. But that was the United States at the time. Unfortunately, it still is.

That was very satisfying. I think I did a lot of teaching for librarians and gave them some valuable information that they probably could have gotten on their own, but who has the time. And if someone can lay it out and say, "This is what you need to know about this process," that's a shortcut. I think that was great.

Of course, the travel. Although I don't ever want to get on an airplane again, the travel was fabulous. I went all over the world, literally. It was wonderful.

It was wonderful until Dixon Brooke retired and Tim Collins became the president and CEO. He had been the head of EBSCO Publishing. And it was reorg after reorg after reorg after reorg, and nobody knew who was working for whom. In that last year, I don't think I ever saw the person that I had been told was my boss. That last year was really kind of rough. When Allen gave me the opportunity to retire—Scott's transverse myelitis hit December of 2012, so 2013 was kind of a rough year, as you kind of declined—and I retired in July of 2014. And that was a relief. So, back to you.

RF: Yes. Scott, let's go back to you and UAB. I know there are some things you wanted to say about the additional responsibilities that you picked up at UAB.

SP: One of the things that Bob Braude had been very clear about is, he said, "You need to reenergize yourself in your career," and there's a couple of different ways you could do that. One is, you change jobs. One can be that you change careers altogether, but if you're going to stay at one place for a long time, you can find additional things outside of your responsibilities, so you're kind of reinventing your career from the inside. And if you are good at hiring people, and if in particular you have a really good senior group so that they are running the library, then you will have the freedom and flexibility to go off and do other things. And I remember him saying—and this was when he was at Cornell and he had Carolyn Reid as his deputy—he said, "The fact is, they almost never need me. But when the phone rings on Sunday morning, my first thought is always, is it the library." I internalized that philosophy and I was able to put together the kind of team that we had.

During my first years there I was more involved with the day-to-day, because we were dealing with all the trust issues that we talked about, although Nancy, as my deputy director, really did a lot of the day-to-day running. When she retired and I brought Gabe in, we had really been through that, and so I was really able to turn the day-to-day stuff over to Gabe. So, I had more freedom to get involved in other things around the university. Out of the work that we had been doing with IT, as they were trying to figure out what to do with academic computing, they gave me a title to indicate that I had, sort of, responsibilities. The health professions folks decided it would be good to have me as a faculty person. I did some searches for them and did occasional lectures.

LF: You mean interview candidate searches?

SP: Yes.

LF: I'm thinking, MEDLINE searches? You did MEDLINE searches [laughter]?

SP: It was sometimes useful to bring me into a situation where there was a lot of internal politics, because I worked well with everybody. I was able to do a lot outside the library, which at that point in librarianship was really important. I had excellent relationships with IT, not just the fact that I had my 'moles' there. I had helped hire the senior people who came in, so our relationship with IT was excellent. Because I sat at the table with deans, I had equal relationships with the deans. I had an excellent relationship with the VP for research.

Again, all of those kinds of connections that our colleagues, as AAHSL directors, tried to get to, I had, because of the situation, but then it was how do I take advantage of them. And a lot of that was just using it to open up doors for the rest of the staff. So, when the NIH Public Access Policy came in, for example, and it became clear that librarians were going to have to step up to figure out how to help the faculty comply, we already had the relationship with the VP for research, so I was able to get our head of reference

connected with them. We didn't have to go knock on the doors of people that didn't know us. We had that relationship. We could go and we could build that.

When the School of Medicine in the education program was looking at developing a new module—where they wanted to set up a process so that in the clinical years, you would have to do a presentation that drew from your basic science background and explain the basic science behind a particular clinical program with all of the references. Well, I sat on the curriculum committee, so it was a very natural relationship for them to turn for us and for us to bring in the reference librarians as faculty colleagues to help work out that relationship. And we were instrumental in making that program successful.

So, again, examples like that all over campus, where I would be able to use the close relationship that I had built with the dean or department chair or administrator, and that way I knew what the problem was, and then I could figure out how do we help solve that.

Judy Messerle had given me the lesson way back when, and it was basically, you identify who the person in the institution is who controls the money, you figure out what is keeping them awake at night, and then you help them to sleep better. And it's amazing to me how many times I've had a conversation with a colleague about that and that's just completely alien to the way that they thought about stuff, because they think about, this is what the library does—I have to get them to want what I provide.

One of the mantras that I would use—and I think I started saying this when I was at St. Louis—is, our job is not to build a better library. Our job is to use our unique talents and skills to help the institution achieve its goals. Sometimes, that means we will continue doing the things that everybody thinks that a library does. Sometimes it means we will stop doing those things because they're not what's necessary. And oftentimes it will mean we will start doing things that nobody ever imagined we'd [take on]. And that philosophy permeated everything we did.

The other thing that that enabled me to do is get involved in all of the other things that I did. The traveling that I was able to do, the speaking I was able to do, my involvement with MLA, my involvement with groups, all of that stuff I was able to do, partly because I had a really good team at home, and also because the technology at that point kept me in really close contact.

RF: But you had been very strategic and very thoughtful at the outset about what you needed to do to address the organizational dysfunction you inherited and to turn that around over time, and that gave you that opportunity later to do the outreach and build relationships, and to develop relationships ahead of the point of need.

SP: Right. And again, it was so much the things that I had learned from the people when I was at NLM, from working with Judy Messerle, from Bob Braude, people who were so influential really early on and determined the way that I thought about things and looked at things.

LF: And it all gets back to the relationship and establishing relationships first. This is one of the things that made the Faxon transition interesting and maybe a little easier for the medical side. Because I already had relationships with all those directors, and so when they started to get wind that their money was gone, they would pick up the phone and they would call Lynn and say, “Can you help?”

RF: And you were already a known, trusted individual.

LF: Trust is everything.

Are you going to talk about the consultants and the—?

SP: Yes. So, to close the UAB chapter, the two libraries reported at the same level, as I’ve said. When I got to UAB, the campus—as you would have remembered it—was very much divided between the health sciences side and the general academic side, and there was a VP for each side. Lister Hill was the library for health sciences and Sterne was the library for the general academic side.

When I arrived, the president at the time, Claude Bennett, had just made the huge organizational change to combine the two VPs into a single provost, and he wanted to create one big university. Over the next decade, UAB went through the growing pains involved in that, and there were huge, huge growing pains. Didn’t really affect the libraries much except that the two library directors and all of the deans now were getting together every week or twice a month or whatever the deal was, depending on which provost was organizing things. But there was still not a huge need for us to do a lot of complementary work.

As we started getting into electronic information and licensing, that really started to change. We were starting to do more joint licensing of packages. We would still be looking at things independently, but increasingly the big Elsevier packages, big Springer packages, the big Wiley packages, those were things that were used all across campus. So, that happened within the library world, where what had been very separate is getting melded together.

Organizationally, because the institution is now working toward this one great institution and is investing a lot into the undergraduate side, we’re starting to see a lot of joint programs. Engineering and biomedical engineering are becoming important. They start talking about an undergraduate degree in medical sciences. Lots of joint programs. So, academically, that split between two halves of campus is starting to shift, and I’m starting to see more and more of a need for more cooperation and more working together.

But the cultures of the two libraries were hugely different. And while I’m pretty good at working with almost anybody, Jerry Stephens and I were never able to work effectively together.

LF: Jerry Stephens became the director of Sterne [1985-2014].

SP: Jerry became the director of Sterne. His style was completely different, his background was completely different, I was a threat.

RF: Jerry wanted to be the boss?

SP: Jerry wanted to be the big university librarian. But in actual fact, given the nature of UAB, Lister Hill was really the university library. If you compared the two—and I think it's really important for people outside of UAB to understand this, because the setting is really different from every other institution—there was not a great big research enterprise and a quasi-independent medical operation. There was a great, big health science center where all of the research was done, and there was a small undergraduate college attached to it. In the big research institutions, where the university library, by budget and staffing, is typically seven, eight, nine times the size of a medical library, at UAB they were roughly the same size.

RF: Which is small for a general academic library.

SP: It's very small for a general academic library, but UAB Lister Hill was one of the largest medical libraries. A new [vice] provost had come in who I bonded with really, really quickly. I had been idly talking for some time with the [vice] provost, who was in charge of finance, about the possibility of bringing consultants in to look at this, because I couldn't see a way that Jerry and I were going to be able to really do the things that it seemed to me we needed to do together until somebody forced us to. Suzanne Austin, who was the new senior vice provost, saw it and I worked with her, and eventually we were able to bring in Huron Consulting to look at the setup. And while Huron was doing their review was when transverse myelitis hit. Now, that first year, I was still functioning pretty well, and given the uncertainty about transverse myelitis, we still had every reason to expect that I was going to recover. But it unsettled some things.

As the process proceeded with Huron and they came out with their report, the recommendation was to do a merger of the two libraries. The vision—and again, this is why I think it's difficult for our colleagues from outside to really grasp this without understanding the difference of UAB—the vision was not that the medical library would be brought into the big university library, because that wasn't the environment. The vision was that you would really take two equals and use the best and the strongest of both to create a new entity. There would be one university library that was 'location agnostic'—was the phrase that came out in the report—and would figure out how to serve the entire increasingly multidisciplinary campus.

I was excited about that vision and I backed it completely. I told my staff, I know this is scary, but this is really going to work and I am convinced that the administration is behind this, that they understand it, and that they will support us. The only person's job that is really at risk is mine. And we proceeded on.

Very early in the process, before the consultant had actually been hired and I'd been talking with Suzanne Austin about how things might go, she was trying to sort of figure out a way to move me into that position, because as close as she and I had been, her relationship with Jerry was absolutely the opposite. I remember her saying, "This man has no business running a library."

LF: We agreed.

SP: And could she have figured it out, she would have just given me responsibility for the whole thing. I was the one who said, "You know, we can't do that. There's going to have to be a national search. I'll apply, but there's got to be a real search, because I can't be successful if we don't really go through the full process,"—which she got, some.

They set up a search committee, and I had been clear with my staff, and in general whenever it came up, that I intended to be a candidate, and I would tell people, I put my odds at 75%. It's not a 100%; it's probably better than 50-50. We'll see what happens. So, I applied, Jerry applied. The search committee included three librarians from each library, and I think there was a student, there was one of the deans, there was another faculty member. So, it was a librarian-heavy search committee chaired by Suzanne Austin. They had a consultant who would help gather candidates.

After the committee met the first time, when the first set of applications had come in, I got a call from the consultant, who said the committee had decided that they would not consider either me or Jerry Stephens for the position, because they felt the divisions between the two sides were so severe that neither of us could be successful. And so they were not even going to go through the process of interviewing either of us.

I was shocked and I was disappointed for about fifteen or twenty minutes, and then I was even more shocked, and I thought, I think I just dodged a bullet, because I had realized by that point that with the transverse myelitis, although I knew how to do the job that needed to be done, I didn't know if I was going to have the stamina to be able to pull it off. I remember getting up the next morning—and I write in my journal every morning—and writing, "I think I dodged a bullet."

LF: You were getting around then with only a cane. I don't think you were using the walker yet.

SP: I was not using the walker yet.

LF: It was a painful process to get from meeting to meeting to meeting.

SP: Yes, and I was continuing to get worse. Now, I didn't know what I was going to do, because the two director jobs were going away. Before transverse myelitis, I had assumed that if I didn't get the job, I would be a good candidate for any director's job that opened in the country and we would just end up going elsewhere. So, I wasn't concerned about my future in that sense.

I get this news and discovered that I'm relieved and kind of wondered what I am going to do. I give some thought to, gee, I wonder what I would like to do if I was going to stay. By that time, through a lot of the other work that I was doing with scholarly communication, I had gotten very, very interested in the problems related to data. I had become convinced that although there was this tremendous focus on open access to journal literature—and I was in the thick of the open access wars, which we're going to get to—but I became convinced that the real potential for advances in science was when we opened up data. And the problems associated with that were huge, because we understood journal literature; nobody understood data and how to really deal with it at the institutional level. And I thought, that would be an interesting thing to do. But I didn't know what was [coming].

A month after I get the call, there had been a Deans Council meeting, and after the meeting Suzanne takes me aside and says, "I'd really like to get together with you next week and talk about where things stand." And I hadn't really heard anything from her in this interim. I say, fine, and we set up a time, and I go to her office, and she's there with a lawyer. Now, this is not university counsel; this is a local lawyer who has an adjunct position in the school of business—that Suzanne had started to rely on for legal advice, when she wanted legal advice but didn't want to involve university counsel.

LF: [Laughter] When Scott comes home and tells me about this lawyer, I think, oh, my god, what has he done?

SP: So, anyway, what Suzanne says, and she sort of apologized, "I had to work on getting Jerry to retire."

LF: She had spent the interim working at—

SP: And he was not happy about that.

LF: He did not go softly into this whatever.

SP: She says, "But I got that worked out. The announcement for his retirement is going to be coming out on such-and-such a day. And now I want to know what we need to do to keep you at UAB." And I said, "Well, if I was going to stay"—because I'd now had a month to think about it—"here are the things that I would like to do. And this is the amount of time I would like to have."

I go through all of this, and the lawyer takes all kinds of notes, and the next day he sends me a draft of the new contract, and I make a few suggestions and a few changes, and we go back and forth. And within a week, I have a new contract that guarantees me a position under the terms that I wanted. There are still some questions about exact reporting lines when the new dean of libraries comes in, but Suzanne made sure that I had that contract done and signed before the new dean was hired, and I am tremendously grateful for that.

And I have to take a break again, and then I'll be able to finish that up fairly quickly.

RF: Except I have a couple questions for you and that may drag it out.

[Conversation during break omitted from transcript.]

So, when you said, Scott, that it was clear that the two of you couldn't work together, I would characterize it as, it was clear that Jerry couldn't work with anybody cooperatively.

LF: His staff was subjugated. He had totally subjugated his staff. He was the only who could speak for the library.

RF: And I think that the culture he communicated and built within that library was very insular, very fear-based, I think.

LF: Oh, yes, definitely.

SP: Yes. And it was very much 'us against the university,' so it was Jerry, who is a member of the senior leadership team, constantly bad-mouthing the senior leadership.

LF: That's not a career-enhancing move. As he found out.

RF: Well, good, so I'm glad he retired. That was a very positive thing for lots of people.

[WAV recording 4]

RF: This is a continuation of the oral history with Scott Plutchak and Lynn Fortney on January 9, 2020.

SP: All right. So, the new dean is hired. He interviewed extremely well. There were maybe some red flags but I don't think anything too serious. He appeared to understand the vision of what we were trying to do and the issues that were involved. I met with him and Suzanne and we talked about what my role was going to be. We decided on the title, director of digital data curation strategies.

Initially, the thought was that I would report to the new dean and we would be doing this out of the library. Before the new dean started—and I still don't know what the background of this was, although, again, I'm tremendously grateful—Suzanne told me that over that weekend she had decided that I would continue to report to her. I don't know what led her to do that, but it would have been a disaster for me to report to Dean John Meador, who turned out to be a disaster for the libraries.

LF: Well, for Lister Hill, maybe not so much for Sterne.

SP: It was probably not as much of a shift for Sterne because they had not had good leadership. But as much as we've talked about the importance of personality and people and openness and all of that, Meador turned out to have none of those skills after all, although he had talked about it. From the very beginning—I mean, from his first week—he was making it clear that opposition to him was not going to be allowed. And, he also made it clear—he said it explicitly—that anybody who had been on my leadership team was not going to be on his leadership team. And I heard through the grapevine one of the paraprofessional staff saying, “Well, I guess that means all of us”—which, again, was kind of heartwarming, because it was an indicator of how people viewed it. But it also was an indicator of how different it was going to be. He had no understanding of the importance of the medical side of things. His previous institutions had been universities without a medical school, and so in his mind, you focus on the undergraduate students and you build out the collections and that's pretty much it.

LF: Collection building was his thing. We've got to get more stuff so we can be an ARL [Association of Research Libraries] library.

RF: He got that idea from Jerry Stephens, probably.

SP: No, it was an idea that he came with on his own. Anyway, so that's happening. Thank goodness I have been moved organizationally outside of the library.

I was able, over the course of the next three years, I think, to do a fair amount of good work in terms of looking at the needs university-wide. Again, I have those good relationships with people; I was able to make connections; I was able to put some teams of people together. By, I guess, December of 2016—I'd been doing this for about two years—I was able to put together the outlines of a plan for what the university would really need to do in order to start to really grapple with data management at the university level. And it would have required, unfortunately, more leadership out of the libraries. Suzanne and I would talk about that, but it was clear that that was not an interest that John had, and possibly because of my involvement with it.

I don't want to spend a lot of time talking about him and the issues, but I will give you one example that I do think sort of typifies the problems with him. UAB had gotten a big grant through the NIH Clinical and Translational Science Awards Program—the CTSA grants—and any institution that had a heavy investment in NIH research at this point in time, the CTSA grants were essential. They were basic infrastructure grants, and NIH was very clear in getting the signals out that if you wanted to remain competitive for NIH grants throughout all of the institutes, the institutions that were CTSA grantees were always going to get priority. And they were expected to cooperate with each other, etc., etc.

LF: So the most important—

SP: And there are millions and millions of dollars and all kinds of subgrants and activities going on. UAB had gotten one of these grants, and Lister Hill had gotten very

involved with working with certain pieces of the CTSA. What we called the CCTS was the Center for Clinical and Translational Science, so that was the unit. The head of that unit was the associate dean for research in the School of Medicine. He was a great guy. I'd worked with him on a number of things.

I had been in my new role for a year or so, and I was invited to come to a meeting of the CCTS leadership to talk about some of the things I had been working on. I came and I did a ten-minute presentation. We got done—and Bob Kimberly is the guy's name—and he and I are talking. As we're talking about what he's doing and what I'm doing, what emerges is, because of the timing in when they had been able to get things started with the grant, he had a bunch of money left that he really needed to spend by the end of March, and we're having this meeting at the end of February. He's trying to sort out, are there any things that I had been working on that he could spend money on. I'm thinking, well, I had been wanting to get an institutional membership in ORCID, which I think was ten thousand bucks or something, and I had been thinking I would go around and I would get a couple of thousand. And Bob says, "That's fine. We can handle that." And we talked about some other stuff.

What emerged was, because Lee Vucovich, my head of reference, had been doing so much work supporting a variety of activities with the CCTS, Bob would pick up four months of her salary retrospectively in recognition of the work that she had already done. That would get her name into the grant. No guarantees for what would happen in the renewal, but it would basically be four months of her salary and benefits and the whole bit going back to the library. So, free money and a librarian on the CCTS grant—now, again, the kind of thing that people like us would fight for. I get back to my office, I'm all excited, I call Suzanne, I say I just had this great meeting with Bob Kimberly, this is going to work. He's going to talk to his finance guy. Would you talk to John, explain what the deal is? All he needs to do is have his finance person contact Bob's finance person so they can get this worked out, because we've got to have it done by the end of March. And she says, "Great. That sounds wonderful."

A week goes by and I haven't heard anything, and I was needing to get this settled. I check with Suzanne again and she says, "Well, Dean Meador said no, and we can talk about it when we meet the next time." A couple of days later, we go and we have our meeting, and I say, "So what's John's problem?" And she says, "Well, it's hard to say." What emerges is, apparently his nose is out of joint because the opportunity came through me, and he wasn't approached directly by Bob Kimberly to do this thing. Well, he wouldn't have been because he had no relationship with Bob Kimberly. I said, "You're telling me that the dean of libraries has an opportunity to have a librarian put on the most important grant that the university has and get four months of salary back for it without having to do anything, and he says no?" and she says, "Yeah, I'm afraid so." So that sort of typified it.

But he is in the process of leaving now. They have just interviewed candidates for the new dean. But in the five years he's been there, he made no relationships with anybody, there was no outreach. He brought in a new integrated library system, so they now have

Primo; the libraries are both on the same system. Morale is terrible. Lots of people have left. And that whole spirit of innovation and energy and whatever that we had was gone within a few months.

LF: Just quashed. Everybody just keeping their heads down.

SP: I continued on. In January of 2017, I turned in my report. At that time, the VP for research, who I had worked very, very closely with, has retired and so a new VP for research is about to come in. The provost has announced her retirement, so there's a new provost who's going to come in. And by this time, my health has continued to decline. I think in my last year, I was probably only actually going into the office twice a week. I was doing a lot of work from home. I was managing to meet my responsibilities, but I was certainly not working at the level that I had been used to.

LF: Anyone that saw him could see what a struggle it was.

SP: And essentially, Suzanne had protected me. But with the change, particularly the change with the provost, it was pretty clear, I think, to her—and I recognized that she did not know that she would be able to protect me when the new provost came in and wanted to know, why are we paying this guy the salary—because I was still getting my library director's salary for very nebulous responsibilities. We needed an exit strategy, and again, we called in the same lawyer who helped to sort things out. As it turned out, UAB had a really good disability insurance program of their own, and so I was able to get into that. I ended up retiring in November of 2017 with the university's disability and disability through the teacher's retirement system. And then, at the end of December, I got word that I had qualified for Social Security disability. From a financial standpoint, it turned out that on a take-home basis, I was actually bringing home a little bit more monthly than I had been while I was working.

So, again, the weirdness of fortune as it has followed me through my life, it was true what I said to my library staff—that the only person whose job was at risk was mine. And all things considered, it worked out all right for me. It did not work out well for most of the people who stayed. And you see what one bad hire can do.

Now, I hope that the new dean who comes in is going to see the opportunity. Several of the candidates—the candidates are public now—they're all coming from the academic side, but several of them are from institutions that have a big medical school, so there is hope that they will recognize that importance.

LF: And the merger between a medical library and the academic library has been happening all across the country, which was diminishing my role at EBSCO, because now, instead of the medical library paying EBSCO, the medical library was transferring money to the academic library, who would then pay EBSCO. So there was no visibility for me that we're getting this medical library business.

SP: Which again, is a different model from what the merger at UAB should have been, which is a true merger as opposed to bringing [the medical library under the academic library]. We will see what happens. But anyway, that is the point at which I retired.

RF: We've talked about a bunch of the key strategic things that you came in knowing that you needed to do and where that led. Besides cultivating great people and setting up an organization for success, what are the pieces that gave you the most reward?

SP: Well, I think the things I mentioned. It's really setting up an environment in which people were able to thrive, some of whom had then gone on. Liz Lorbeer went up to Western Michigan and started a med school library from scratch. Gabe Rios went to Indiana and has done really well there. Gabe happened to be in town a week or two ago and came over and spent an afternoon at our house just talking, and he said, "Still, things come up and I just shrug and I say, 'Plutchak lessons,' and they all know what I mean." And Liz had said similar things to me—that they look at their time at Lister Hill, that it helped to form them. And they go back and they look at what happened and rely on that.

So, I think that is the biggest thing in terms of being the director there. I hate seeing what has happened afterwards, but I was also thinking earlier today when the two of you were talking about the ups and downs at Lister Hill before I got there, and we talk to our colleagues in other institutions. And that's the way that organizations go. I was able to take a badly demoralized organization and rebuild trust and creativity, and we were able to do a lot of good for the students and the faculty and the people who worked at the library for a solid decade-plus [editor's note: Plutchak was director for nineteen years]. So that's an achievement, I think.

LF: And I am proud of you.

RF: Yes, as you should be. Let's talk a little bit, though, about your publication/presentation side as well, because, again, it probably goes back to what you were saying about having the staff to give you freedom to invest your time elsewhere. But not everybody chooses to do that, Scott. Also, I'm sure it goes back to your many interests. But that has clearly been an important, significant part of your career.

SP: Right. Part of it goes back to what I was saying earlier about the NLM investment. I went into my career with the understanding that my responsibility was to do more. And it wasn't just to run my organization, but it was to help to shape the profession. It was to help influence the direction of the profession. That's what the NLM Associate Program had been for.

RF: And you internalized that.

SP: Yes. I never questioned it. That was the expectation; that was my responsibility. My interest in writing and learning really connected with that.

One of the first things I wrote—and this is still taught in library schools—when I was in St. Louis, we had done a trial for one of the first CD-ROM MEDLINE installations. NLM had given out a number of grants to places to put in a system. This was just before CD Plus came out. They actually got in just at the very tail end. And I don't even remember whose product we had, but there were three or four vendors—

LF: There were a lot of them.

SP: —that were selling CD-ROMs. We did our evaluation. And one of the things that I identified was, librarians had a tendency to do evaluations based on satisfaction, so we were always looking at satisfaction. What I realized as we looked at what was happening with the people who were using our systems, and as we were interviewing them and getting feedback, was we really needed to map it out on a grid that looked at satisfaction against competency. Because what you wanted was for everybody to be competent using the system and satisfied with it.

But what turned out was, people were in all those blocks, so you had the incompetent and dissatisfied. And that group we didn't actually worry about, because they told us they were unhappy and we could try to help them with the system. Then there were the competent and dissatisfied, and they were a little bit more frustrating, but they would still self-identify. They were competent and they were using the system to the best of its abilities, but they were dissatisfied because they wanted the system to do things that it was not capable of doing. We could help explain that and work with them, and try to get them more satisfied with the way the system was. Competent and satisfied is where we wanted people to be: if they were using the system the way it was designed to be used and they were happy with the results they'd been getting. The group that worried me was the incompetent and satisfied, because those were the people who were getting terrible results, who were wasting time, but they were so happy with what they were getting.

RF: The system made them feel they were competent.

SP: Right. I wrote up a little article on the incompetent satisfied that was published in the *Medical Reference*—

LF: *Medical Reference Services Quarterly*. The inept but satisfied.

SP: So, the scales were satisfaction and ineptitude. It was the inept but satisfied. And that touched a chord, because so many people were seeing that, but nobody had ever articulated it like that. I think if you go to Google Scholar, that piece, which came out in the early '90s, late '80s [1989], the second thing I ever published, that still has more citations than anything else I've ever written.

LF: Which is incredible.

RF: [It was] fundamental.

SP: And it's a nice, short—it's three or four pages and there's one little diagram. I did a presentation at a meeting about that and got a great response. And I think what it demonstrates is, the thing that I had been particularly good at is taking things that people fundamentally know, but being able to describe them and present them with a degree of clarity that makes them go, "Oh, yeah, that's it, that's right."

When I started doing these presentations, they were very effective, and I really enjoyed doing it, so I would get asked to do more. And because I was often being asked not so much for what it was I specifically knew but because people knew I was a good presenter, I often got to really pick my own topics. It gave me an ability to explore the things that I was interested in. And the more that I did, the more I got asked.

The irony is, for somebody who is—again, as I said earlier—very introverted and very shy, feels very, very awkward in a room of ten people informally interacting if I don't know them, getting up in front of 2,000 people when I have a role to play is fine. I enjoy that. I love the Q&A. Having to respond off the top of my head to a good question is just absolutely pleasurable.

And it gave me the opportunity to travel. Lynn talks about that. I got invited to Belfast to do a lecture; I got to go to South Africa; I got to go to Australia; I got to go to Romania. I traveled to Korea, Japan, all over the United States. So, there was that in general.

But I think it then intersects with the other issue that really, I think, characterizes the last ten years of my career, which is this focus on scholarly communication and publishing and open access and digital data.

RF: All the boards that you served on.

SP: Yes. A couple of things happened at the same time. I became the editor of the *BMLA* [*Bulletin of the Medical Library Association*], technically in 1999, but April of 2000 was my first issue. I took it over from Michael [Homan]. I found myself in the position of an editor of a small society journal, so I had to think a little bit differently about journals—and how they were funded and how they operated and what was involved.

I was also—as we had talked earlier, I think it was [2002, and it first met in 2003] that Mark Danderson started the *New England Journal of Medicine* [Library] Advisory Board, and I was put on that board. And that was huge because of the kind of information that they presented.

As late as 2001, when we went to Australia in 2001, and I did presentations in Sydney and—I think the one in Sydney—

LF: No, Melbourne.

SP: Melbourne I did something about the *BMLA*, but in Sydney, the title of my talk was, “Robber Barons of the Information Age.” It was still all full of, the evil publishers are ripping us off and blah blah blah. As late as 2001, I was still repeating what was the standard line that librarians believed.

RF: That was the world view at that point.

SP: But the *New England Journal of Medicine* really started to make me question that, because I was getting information that librarians didn’t have and they didn’t bother to find it.

Marty Frank was the CEO of the American Physiological Society, which has a big journal program, and he was also sort of the spokesperson for FASEB, the Federation of [American Societies for] Experimental Biology—so, the big, basic science journals. When the open access wars started heating up, he was right in the middle of them. I had met Marty shortly before that, because UAB’s physiology department was very involved in national activities and our chair of physiology was doing a term as president of the physiological society. Given Marty’s role, he would make visits to UAB. Because of the various connections that I had, a senior person in the department of physiology who knew me and knew my interests thought it would be nice to invite me to dinner—at Highlands, as it happens—so that I could meet this Marty Frank, because he thought, oh, they might be interested [in each other]. We hit it off. And so, again, I started to see things from his perspective.

The UAB dean of medicine [Robert Rich] was the editor of the *Journal of Immunology*, and there was a stretch where there were these competing letters. There was a letter that SPARC [Scholarly Publishing and Academic Resources Coalition] had organized about how important open access was, and SPARC was promoting a particular piece of legislation. And Marty organized a letter from a number of department chairs and deans arguing against that and why the passage of that—

LF: It was the rise of the resistance is what it was.

SP: Yes. Why that would have been a terrible thing. That letter went out. The UAB dean of medicine’s name, given his position, was the first signatory among all of these. And Michael Eisen—big name, who was with PLOS [Public Library of Science] for a while, is now the editor of *eLife*, and has always been a big rabble-rouser for open access, and talks before he thinks—put up an inflammatory blog post about how the signatories of this letter obviously didn’t care anything about education, didn’t care anything about research.

I was on my way up to a Deans Council meeting where I sat across from the dean of medicine—and I didn’t necessarily agree with him on everything, and in the issues of open access, I was much more in the middle. But I thought it was outrageous and I wrote a blog post that was basically, if these are my friends, I’m outta here.

I did a keynote presentation at the Charleston Conference around that time in which I declared myself to be an open access heretic. The analogy was, Martin Luther never quit believing in Jesus Christ, but he quit believing in the Pope. And I never quit believing in open access, but I quit believing in SPARC, which did not endear me to SPARC afterwards. In fact, I also then got word that somebody... on the ARL board contacted someone on the AAHSL board to see if they could shut me up... The reaction from whoever they contacted on the AAHSL board was pretty much—

LF: ...And it was like, are you kidding?? No one could shut him up.

SP: So, my perspective really started to shift. Marty and Michael Keller at Stanford, they had set up a publishing unit out of Stanford—HighWire. Michael had set up HighWire Press, and Michael had taken Stanford out of ARL, which was a huge scandal, because he was just fed up with the direction that they going. And he was becoming a publisher. He was understanding what those issues were. And Marty's journals were published on a HighWire platform.

Marty and Michael had two meetings at the APS [American Physiological Society] headquarters, which is just off the NIH campus, where they brought some people from publishing and some librarians together to spend a day talking. It wasn't necessarily going to turn [into] anything else, it was to just try to get some key people together and start to get some conversation. We did that two years in a row, and those conversations were really, really good. But there wasn't any follow-through, because that's not what the point was.

About that time, I was getting increasingly fed up with the rhetoric that was coming out of the library side of things, because SPARC was getting really, really strong, and ARL was leading the pack and all of the associations were following along, AAHSL was following along, everybody was following along. I wrote a white paper that I sent to the AAHSL Scholarly Communication Committee, which essentially laid down the challenge that, let's come up with a project and connect with some people in publishing and see where we can agree on something, anything, because this antagonistic thing is not doing anybody any good.

By that time, I had been invited to go and speak in Frankfurt at the annual meeting of the STM association [2012], which is all the major STM [scientific, technical and medical] publishers, and it had become really clear to me that the publishers were doing really innovative things and they would be very happy to work with librarians. They understood the need to make that connection. The librarians only knew the salespeople, but the executives were looking at the bigger picture.

LF: And they'd only be happy to work with the librarians if the librarians were not carrying torches and pitchforks.

SP: Right. But librarians needed to step up. I had been invited to a meeting. A new CEO came into Elsevier and he was having his first meeting of all of the senior managers

for all the Elsevier divisions. I was invited to come in and speak. And it became clear that the reason that I had been invited was that they needed somebody from outside the ranks of Elsevier to tell the Elsevier managers how and why they needed to change. I was trusted because I was the one librarian that anybody knew that seemed to understand both sides of things and who had adopted this kind of neutral position of trying to bring people together.

All of this stuff was going on and I was trying to see if AAHSL could be pulled in that direction. In the way that AAHSL does, they sat on the white paper for a year, and then they formed a task force led by Michael Homan and Gail Yokote to try to come up with something. They put me on the task force and there were a couple of other people. And I had been thinking about this for a long time. We got together. It was at an AAHSL meeting in DC at what's now the Marriott [Wardman Park; earlier a Sheraton hotel]. I can remember sitting off to the side. We get together and we say, okay, how do we approach the publishers? Who do we talk to? And I basically said, these are the associations they belong to. These are the people who lead the associations. As a representative of the association, we write to the executive directors of the associations, and we ask them if they would be willing to send a representative to come to a meeting to talk about the potential for shared [discussion]. "Oh, yeah, got it. What an idea!"

LF: What a concept. We asked them if they want to play.

SP: But we asked them by going through the associations, because that's how we operate.

LF: That's right, because we're an association. Yes.

SP: Even people like Michael and Gail didn't know what associations were out there or who the people who were involved or what the relationships were. I knew all that because I had now spent several years with one foot in that camp.

We got the group together. We had the first meeting. It was really good. We decided to have another meeting, and we're trying to decide what to call the group as we were collaborating on this stuff. And the names that were being proposed were all really boring and technical. I was remembering...the ICMJE, the International Committee of Medical Journal Editors, was originally called the Vancouver Group, because when they had first gotten together and first developed their thing, it was in Vancouver. For a long time, people didn't pay any attention to those initials; what they remembered was the Vancouver Group. So, I said, we're meeting in Chicago, we're talking about collaborating. Let's call it the Chicago Collaborative. [Editor's note: The Chicago Collaborative was initiated in 2008.]

For the next few years, we met twice a year for two or three days. The conversations were really good. We brought in guest speakers. We found out that there was tons of stuff that we could talk about very productively. Preservation was a big thing; digitization was a big thing. We consciously kept open access off the table because we

knew that was something we were going to fight about, so let's not start by talking about the stuff we're going to fight about.

We built within that group a lot of trust, but we never figured out how to move it beyond the group. We would come to the annual AAHSL meeting and we would try to talk about what we were learning and what we were finding out, but the distrust among the [AAHSL] group in general was so thick.

One of the projects we were working on was to develop this Publishing 101 that we wanted to present at librarian meetings that would give librarians more information about publishing. The publishing people were very eager to help put that together, and we actually put together a really nice, little program that got presented at a couple of different meetings. Then we wanted to do a Librarian 101 that would be the same kind of thing that we could present to publishers, so they could know that we were more than just a buying thing, that we did all of this other stuff and were connected in all these other ways. And I remember presenting the idea at an AAHSL meeting, and one of the librarians raising her hand and saying, "But how do we know they won't use that information against us?"

RF: What are we going to give them that they would use against us?

LF: Yes, the suspicion was just rampant.

SP: But it was just that suspicion, and it was shared by some people on the AAHSL board. Michael would report back to the AAHSL board and he would come back to the group. And Michael being Michael, would only give us these sorts of vague indications about where there was discomfort and unease, but he would never be specific about who actually said what and what the actual objection was. I was never able to figure out, how do we really address it and who do we address it to.

Then, unfortunately, as sometimes happens, we got bogged down in organizational issues. Okay, so, what is the Chicago Collaborative? Should it be its own organization? AAHSL is providing a lot of the money. The other organizations are providing funds for their reps. What does the budget look like? The AAHSL board wanted a budget; they wanted to see the numbers.

LF: They would need bylaws [laughter].

SP: They wanted to see, do we need bylaws. So, where we had had a couple of years of having these really good conversations about issues, we started having these conversations about organizational structure.

Jean Shipman ended up taking over as facilitator when Michael and Gail rotated off, and we switched to having a librarian and a publisher as co-facilitators. I think some of the associations were kind of getting tired, because they were also not seeing any payoff, which, to my mind, was partly because we were being pulled back by AAHSL not—

LF: Don't get too cooperative with the enemies.

SP: Yes. So, SSP [Society for Scholarly Publishing] ended up making a proposal that they could take it over, which, actually, they would have been a good fit because, of all of the associations, they were really trying to bring people from publishing and librarians together as equal partners.

RF: And they were a good umbrella organization to do that.

SP: They would have been a good fit. Some of the other arguments—I really felt it needed to be brought beyond just medical libraries, because the publishers were dealing with everybody else. The AAHSL board didn't want to do that. The AAHSL board rejected the idea of it moving to SSP. Then, I think, whoever replaced Jean and other people, because it was functioning as an AAHSL committee, people got appointed to it who didn't have the history, who didn't have the background, who didn't have the passion, and it collapsed.

That was unfortunate, but at the same time that that was happening, it led to what, of everything that I'd been involved in, was probably in the long run the most important thing I've ever done. I got a call out of the blue in the spring of 2009 from a guy who introduced himself as Fred Dylla, who I'd never heard of, who identified himself as the executive director of the American Institute of Physics. He had been a practicing physicist with a very distinguished career, had taken over as the CEO of AIP a couple years previously. AIP has a big journals program.

RF: Huge.

SP: And he was quite startled to find out that all the librarians were pissed off at [him]. As he started nosing around, he was someone who was very, very well connected on Capitol Hill. What he presented to me was that at the request of the [U.S. House of Representatives] Committee on Science and Technology, he was putting together a little—what they used to refer to as a staff roundtable, which was basically a small group of experts who would come together and provide information to the staff of the committee that they could use to in helping to craft legislation. There was an awful lot of stuff going on behind the scenes that I was very unfamiliar with. Anyway, Fred says, “I think that you would be a good person to be on this.” I still don't know who all he might have talked to, but certainly the work that I done in the Chicago Collaborative had helped to identify me as somebody who wanted to try to pull people together. I said, “This sounds great.”

There ended up being, I think, fourteen of us altogether, so it was a very small group [as the Scholarly Publishing Roundtable]. There were three librarians [Paul Courant of University of Michigan, Ann Okerson of Yale University, and Plutchak]. They included the chair of Elsevier, Y. S. Chi, and Mark Patterson, who was the manager of PLOS—so we had the two top people from Elsevier and from PLOS; we had Fred, head of one of

the largest society publishers; we had Crispin Taylor from the American Society of Plant Biologists, a tiny, little society publisher but very, very important in his field; three university provosts [and an association executive]; three librarians; and a couple of people to help us with research [three researchers in library and information science, Phil Davis, Donald King, and Carol Tenopir].

We met in Washington, DC, and our first meeting was in a big congressional hearing room, where the chair of the committee welcomed us. We all made a little statement about the importance of making the literature more open but dealing with all the realities of economics and whatever. The chair thanked us and encouraged us to work together and indicated that the committee would be happy to see what we might come up with.

But we were not formally commissioned and we got no funding, because if we had done that, we would have been subject to all kinds of rules about disclosure and open records and whatever. The two instigators were Fred and John Vaughn, who was the executive vice president of the Association of American Universities, the big association for the big research universities; and the senior vice president is actually the guy who runs it.

What they had recognized was that to pull off what they wanted, you were going to have to have an environment in which you built trust and where people could be confident that they could speak freely and that nothing that they said was going to be shared without their permission. So, the first meeting, we all got together for dinner. That was really important, and Fred and I have talked about that since. We got together for dinner; we introduced; we talked; we conversed; we got to know each other. Then we went in; we did the meeting. And it was all Chatham House Rule [editor's note: participants are free to use information received but not to reveal the identity or affiliation of the speaker]. We were there as individuals who had expertise. We were not there representing our institutions. We were there to share ideas and to share information and to try to come up with a consensus about what policies the U.S. government should take regarding open access.

The Scholarly Publishing Roundtable met in DC four times over that summer, gathered a lot of information, had a lot of arguments. But I think because of the way Fred and John had set things up and because of the focus on building trust and listening and doing it within this kind of safe space... I remember that we met at the AAU offices in DC, and we came in for one of our meetings and there was a window washer outside the building. There's this person swaying outside the building, and Fred looks over and says, "SPARC." Yeah, the SPARC folks were just dying to know what we were talking about.

So, what came out—the report was finished at the end of 2009 [published in January 2010], and we were able to get unanimous agreement on all of our recommendations except in one area. We published the report with two dissents, and the dissents came from Y. S. Chi of Elsevier and Mark Patterson of PLOS. Y. S.'s dissent was, he could agree with everything in the report, but he still felt that it gave the federal government too much control over the business decisions of publishers. Mark Patterson's dissent was, he could agree with everything in the report, but it didn't give the government enough

control over the business decisions of the publishers. And the fact that we were able to come to that, it was like, okay, that makes sense and we can all live with that. [Editor's note: The report's core recommendation was for federal research funding agencies to develop and implement policies for free public access to funded research results as soon as possible after publication in peer-reviewed journals.]

The report went to the congressional committee and to the [White House] Office of Science and Technology Policy [OSTP]. Over the course of 2010, the report made its way through various things that happen in Washington.

LF: The labyrinth.

SP: God knows. The making of the sausages, they say. The America COMPETES Act was up for reauthorization. The America COMPETES Act was a long, long document that gives legislative authorization for a whole bunch of business investment kinds of activities. It's this huge, long thing. I forget when the original one had been done [2007], but it was up for renewal. And what Fred and the staff people that he worked with were able to do was get the gist of our recommendations inserted into the America COMPETES Act. That reauthorization passed—I think that took two years...it was December of [2010] that that passed [and signed into law in January 2011]...

Anyway, you will recall the Holdren memo [from OSTP director John Holdren] that came out in February of 2013. This was the memo that came up from the Office of Science and Technology Policy directing all of the federal agencies that had more than \$100 million in grants had to come up with a plan for making publications and data available. What most people in the library community didn't pay attention to—because they were looking at the outcome—was they didn't look at the background to it. The Holdren memo relies on the legislative authority, because the way that the America COMPETES Act was written was to instruct the White House Office of Science and Technology Policy to figure out how to implement these recommendations.

The Scholarly Publishing Roundtable writes its report. It gets into the legislation. That legislation then gives OSTP the authority to come up with the Holdren memo, which then directs the agencies to set up policies. So, when I look at what the federal agencies are doing in terms of—they all now have policies that are more or less modeled after the NIH Public Access Policy to deal with journal articles. They are all still fumbling around with what to do with data because data is so complicated, and we know that it is.

But all of that activity and the way all of that is shaped, is a direct result of the Scholarly Publishing Roundtable and the work that the fourteen of us were able to do in bringing these people with such different perspectives and forcing us to get together, work in a room, and work through these issues, and found out that in the end, we agreed on a lot more than we disagreed.

RF: Which is really remarkable. When you consider the long history of print publications and publishers on one side, librarians on the other, and just sort of ignoring

each other and their business models, and [not] understanding or talking much, until, I think, electronic publishing just—

LF: It forced us all to talk to each other.

RF: It forced us to talk to each other, but with unrealistic expectations on both sides of the equation.

SP: Well, Lynn was talking earlier about her experience at EBSCO and the relationship building. You had a trust relationship with your serials vendor, but you didn't have any relationship at all with the publishers because you didn't need one. And when we were thrust into the position of having to deal with publishers directly, the only people in publishing that most librarians were dealing with was the sales rep, and the only thing they were dealing about was the price. So, it was an antagonistic, adversarial relationship from the get-go.

SPARC, unfortunately, seized on that adversarial relationship and decided to use that as the basis for all of the work they've done. And I think, quite frankly, in my somewhat jaded view, SPARC has accomplished very little. I'm amused... Heather Joseph and a couple of other open access devotees—

LF: Evangelists.

SP: —evangelists—arranged a meeting in May of 2012, with somebody at OSTP in which they pressed their case for some kind of federal action on open access. When the Holdren memo came out in February 2013—so, nine months later—[they] took some of the credit for having pushed and gotten OSTP to finally take that action. What they did not know was that we had met—Fred and I—had met, with the guy at OSTP who was drafting the Holdren memo six weeks before they came to DC. The policy was essentially already written and developed and ready to go. The only thing they were still struggling with was the embargo—how long should the embargo be. But the rest of it was already in place. And the only thing that they were dealing with was, this was an election year. They were trying to decide when to release the memo and they didn't want to release it until after the election, which is why it came out in February of 2013, once the second Obama administration was up and running. So, Heather and the other evangelists think that they're the ones who got OSTP to finally take action, and they had no impact whatsoever except to annoy the people at OSTP, who were already on their own timetable and who basically patted them on their heads and said, "Thank you very much. We'll take your input."

...Anyway, the last bit of that. So, out of that, I guess it was still 2012... In retrospect, there was some jockeying going on between the staffs of different congressional committees over who was responsible for dealing with the open access stuff. I can go back when we look at the transcript and remember which committee decided to hold a hearing. [Editor's note: The hearing was before the U.S. House Committee on Science, Space, and Technology, Subcommittee on Investigations and Oversight, on March 29,

2012]. I was invited to be one of [five] people to testify in front of Congress on these open access issues—which was a lot of fun, and I don’t think had any particular impact, because it was really, at that point—the timing—it had more to do with staff turf issues than with any legislation that was actually at play.

But I think one of the funniest things I remember from that time—Fred was testifying, [Crispin was testifying], I was testifying; there was a guy from Harvard who was the head of their scholarly communication unit and was a big name in open access; and then there was some consultant guy who I had never heard of before or since, and I’m not quite sure why he was there. But, of course, we’re sitting doing the testimony, and we’ve got timers. Every member gets to ask a question, and we had just so much time [for our] answer. One of the members had asked a question, and I wanted to get in a response, but the guy from Harvard sitting next to me started his response first. And I realized, as he was answering the question, he could tell that I was ready to jump in when he was done, and he started slowing down and drawing out the clock, so that he would be able to run out the time.

LF: Typical congressional maneuver—run out the clock.

RF: So the other view can’t be expressed.

SP: As I said, I don’t know that that really played much into anything, but it was—

LF: But you had such fun there. And it was livestreamed, so I got to watch the testimony from the comfort of my laptop at home.

SP: Yes. My staff all watched it. I was in South Africa just a couple of months later at a publishing meeting—International Publishers Congress—and I ended up having breakfast with Y. S. Chi’s personal assistant, who was—as PAs for people like Y. S. tend to be—she was a twenty-five-year-old brilliantly competent, organized, able-to-do-anything person who also went on to an interesting career. We were talking and we were getting into all of these issues and how I got involved in stuff. She was expressing her feelings that she had been surprised at the anger that librarians and some of the more vocal people expressed towards everybody in Elsevier, because, of course, all Elsevier employees are demons and devils. And she’s the personal assistant of this guy. She thinks she’s working for a wonderful company, and she’s personally hurt by this. I’m expressing my support for this and why I think it’s important for me, and I said something about—in fact, I had the opportunity—just a couple of months ago, I was able to testify in front of Congress on this. And she blushed and said, “Yeah, I watched it.”

I think the testimony and the fact that it was livestreamed had an impact on people who watched it. I don’t know that it had much of an impact on the way that the legislative stuff was moving. The American COMPETES Act, that activity was already in motion. The OSTP memo was already in draft. The SPARC attempt to get a law passed, which is what SPARC has spent the last two decades doing, has never gone anywhere. So, again, when I say that SPARC put all of its eggs in this antagonistic, we are going to lobby

Congress and we are going to get a law passed to do what we want to do—that's never gone anywhere. And the approach the roundtable took—because I think we had people who were a lot smarter about the ways of Congress—was, let's do this through executive order, which is a lot more flexible. We will recommend that OSTP provide this guidance with a lot of flexibility, to relook at it, to not say all the policies have to be the same, to say that you need to work with your constituencies, to recognize that things are changing. Because that's going to end up making progress in a way that is going to be much less disruptive than if Congress passes a law that mandates that everything has to be done the same way. And it turned out that that was more effective and has made much more progress towards open access.

But again, the thing that has delayed it most is the antagonism that SPARC, in particular, had, but then all of the librarians who follow that way of thinking—that publishers are the enemy and we're not going to work with them.

RF: Well, I certainly never had anything in library school about business models or financial planning and understanding the economics of your own institution, let alone a for-profit company, to understand a business model and why—

LF: No, I had one management class, but it didn't have anything to do with where the money went. How much money came in, yes, maybe, but how you went about making your decisions, no.

RF: I was going to say, where's MLA? At this stage of the game, what would you two like to say about your MLA experiences? You got a bunch of questions from me at the get-go. Do you want to go through all of those in detail? Do you want to summarize?

LF: Well, I think, for the seriously curious, it's pretty easy to see our participation in MLA already on MLANET, so all of our committee appointments, etc. In fact, I had to go to MLANET to see everything I'd done.

RF: In some ways, I don't know, for people who read or listen to this, how important it is to detail all of those things. Everybody who has been interviewed in these oral history interviews are people who've been heavily involved in all kinds of different aspects of the association. I think that in some ways, the important thing is, again, there was something that drew you two to feel like you needed to invest your time and energy there.

LF: You've made it pretty clear that it was NLM and Judy Messerle that instilled that in you. I'm not really sure how it came to me except for the fact that I felt like it was vitally important to participate in my professional organization. Nobody told me that's what I was supposed to do.

Curiously, I started going to MLA before I joined Southern Chapter, and not really sure how that worked out. I'm sure personal issues and timing, etc., etc. I joined a bunch of sections, which is what we had, according to your interests. And I would change sections

depending on my interests. There was the academic library section that you changed to—

SP: Medical School Libraries Section.

LF: That you changed to Leadership and Management [Section], which makes abundant good sense.

SP: I managed to destroy a section.

LF: I did, too. I destroyed the Research Libraries Section. Not the Research Section, but the Research Libraries Section because we didn't have enough members. It was not a viable thing to get together for an hour with two other people. I may have destroyed the PIIRC—the Publishing and Information [Industries Relations] Committee or something like that. Again, similar reasons.

Of course, when I first started, I was more interested in the reference-y public service issues.

RF: As everyone does. You start with your job...

LF: Yes, right, you start with whatever you're doing, and then later in my career, it was more the Collection Development Section.

I will say, I can't give enough credit for MLA for their certification program, for their credentialing program that later became [AHIP]...because I think that's really important and it's something that distinguishes MLA from the other library associations. The other thing that really distinguishes MLA is its incredible continuing education program. I learned more through MLA CE than I did in library school. Library school got me the piece of paper that said she's qualified, but it was really MLA CE courses.

Then when I started teaching MLA CE—I don't remember even why, but it was Jo Ann Bell's "Marketing Library Services" that I took over from Jo Ann. I taught that for a couple years—and talk about learning a lot of stuff that gave me a really good foundation when I went to EBSCO, that was really important.

Serving on the Board [of Directors], serving on the Nominating Committee. I think I really had good input on both the board and Nominating Committee because I was out there; I was everywhere. I was not just in the Southeast or in the Pacific Northwest, so I was familiar with the reputations of a lot of people.

SP: I think it's also important to point out, as we've been talking about the relationships between librarians and the vendor community, publishing community, where there's distrust and where there's relationship building, those threads. The fact that Lynn, having worked at EBSCO, by this time for over a decade, was elected to the Board of Directors easily because she was trusted.

When I was on the task force that developed the first code of ethics, this was during the period when Lynn and I were together, but secretly. At one of our meetings, clearly one of the things that came up in the code of ethics—and I'd have to go back to see how it's addressed—was what is the appropriate relationship with vendors and how do you interact, etc. And I remember a hospital librarian...sitting across from me, who said, as we were looking at the language, but this has to reflect how we deal with Lynn Fortney, because she's one of us. That's 1993, and that was how she was viewed.

LF: How do we deal with her? She's not one or the other; she's both. Scary.

SP: But she's one of us. And so how do we reflect that relationship so that it's not adversarial, that it recognizes that we have those connections. By 2000—when did you get elected to the board?

LF: 1999, and then my term started in 2000 [2000/03].

SP: So that reputation that she had was so strong that she was able to...

LF: And I think it was 2000...that I was elected chair of the Southern Chapter [for 2000/01]. At the executive meeting the year I was taking office, there was one of the members of the executive committee that wanted me impeached because I did not work in a library. It didn't go anywhere. But the fact that that sentiment was still there. If you did not work in a library, you could not be a librarian, which to me was the antithesis of my whole career at EBSCO, saying, as librarians we have many, many unique skills that can be very well applied to a setting outside of a building with books.

RF: You spoke the words explicitly numerous times that I recall—that you were a librarian who worked at EBSCO. But I think just the way you talked with people and interacted with MLA members, we didn't even need to speak that. We knew, she's one of us. It's not, well, she's become a Wall Street shark. You identified with the librarians. And I think you had the reputation of being that fulcrum point.

LF: Yes, that was my goal, that is what I was supposed to be doing.

RF: And I think that that was an important factor in why you could be elected to committees and boards years after you started working for EBSCO.

LF: At one point I was asked to run for president, and I really did consider it strongly, but I needed Allen Powell's blessing. It took months, and I had to keep going back to him. He didn't want to tell me no, but he finally had to tell me no. He said, "I can't spare you." Because I explained that this was a huge three-year commitment and it involved a lot of travel, which would be more travel than I was doing now, even. And it felt like Scott—I kind of maybe dodged a bullet on that, because it would have been pretty hard.

RF: It would have been very overwhelming.

LF: But just the honor to be asked was...

SP: I think that it's really significant. Part of the reason, when I was thinking about this last summer and made the suggestion to Carolyn that Lynn be interviewed as part of the oral history program, is Lynn has made many, many contributions to the profession and to MLA and to so many people involved. But I think her singular role as maintaining that identity as a librarian while working at EBSCO and her board service and her invitation to run for president are really, really clear indicators of how successful she was at bringing that together. And because, for me, personally—as we've been talking about the work that I've done, bringing those different communities together—I learned a lot from her about the different communities, and I think both of those things connect. She's, in her singular person, exemplifies what I wish our whole community was doing.

A couple of things that I would say about my involvement with MLA. As you alluded to, coming out of NLM, I *was* told that I was joining MLA. They send the associates to your first MLA meeting. It's near the end of your associate year. You will join MLA; you will get involved; it is part of your responsibility. And when you go, you're under a microscope because all the library directors want to know who the associates are, because they're all looking for somebody to hire. I know that for many people, they go to their first MLA meeting and feel scared and lost and nobody knows who you are and you don't know anybody. Neil and I joked that we should have set up our own booth.

RF: Hire us!

SP: It was such a different experience because of where I was coming from. But the assumption was, you joined MLA and you were involved because it was your responsibility.

LF: Yes, it was what you were supposed to do.

SP: And I remember being shocked when, years later, I would hear people debating about whether or not to join the association, because they weren't sure that they got enough out of it for the amount that they were paying, or they would have to go to the meeting on their own time. And I have enough empathy that I could get where they were coming from. A hospital librarian who's not making much money and is trying to raise a family—you're trying to balance all your competing interests and everybody has to do that, but it was such a different way of thinking about my involvement with MLA, because for me it was never a question. And do it on my own time? Well, what's my own time?

LF: There isn't your own time. He's opposed to the term 'work-life balance.' It's *all* life [laughter].

SP: I think my first committee appointment was in '88 for the [1990] NPC (National Program Committee), because Bob Braude was chairing that. Of course, I had done the thing with Bob. He knew what was going on, so he gave me my first committee appointment. Mark [Funk] was on that, obviously, and Bob put a great [meeting] together. And I think from 1988 up until now—because I am presently still on the *JMLA* Editorial Board for the umpteenth time and I am also serving as an expert consultant for the development of one of the new MLA online courses. I think there were two years in the [late] 2000s—I think when I rotated off the board, I had one or two years where I did not have any official MLA responsibilities. But other than that, from 1988 through 2020, I have always had an official role with MLA, whether it be chairing a section or being on a committee or editing the journal or a task force or whatever.

LF: When the Ethics Task Force—

SP: Yes, this is good. Can I tell this one?

LF: Yes, you may tell it, my dear. This is great.

SP: When Mary Ryan became president—and that was my third year on the board [2006/09], Jean Shipman was president when I started, then Mark, and then Mary. And one of Mary's priorities was to redo the code of ethics. She was particularly interested in conflict of interest. Mary was then always deeply distrustful of publishers.

LF: Or anyone related to publishers.

SP: Yes. She wanted to set up a task force to revisit the code of ethics. Lynn was an obvious choice to be on the task force, because by that time, you were five years off your board duty, but again, very well known, very involved. Nobody could represent that point of view and those issues as well as Lynn could. And I would be an obvious person to be on the task force since I'm currently on the board, and I had been part of the group that had drafted the original code of ethics. We're just about to finalize that at the business meeting, and Linda Walton, who had come on to the board at the same time I did, objects because she says this would be a conflict of interest. Now, I don't think that the rest of us ever quite understood what the conflict was that Linda perceived, but in order to address it, they made me the board liaison to the task force, and that satisfied her.

LF: When he tells me this story, I'm thinking, how is that a conflict of interest if a husband and wife are on the same committee [laughter]?

SP: But because you worked for EBSCO, it was somehow—

LF: So I'm going to pervert your views?

SP: I wouldn't be able to fairly participate because, yes, it was—

LF: Or I wouldn't. You would dominate, as the husband is supposed to do [laughter].

SP: I think some of the other key things from MLA—and this is a piece that has permeated the rest of our discussions about our careers—one of Mark's big priorities... Remember, the slogan of Mark Funk, as the president, was 'Only Connect.' What he wanted to do was to really get the board to use social media and use electronic communication—and move away from this paper and you only do work when you're together in person—and getting more information out. And I was absolutely enthusiastic about that.

I had started my blog not that long before this, and it had gotten picked up and was getting a lot of attention, because I was doing a lot of it, so a lot of people in MLA were paying attention. And I was really seeing the value of it. I was looking through old emails getting ready for this, and I came across an exchange in which Mark sort of presents this as one of his priorities in kind of a gentle fashion as something we should sort of look at and consider. He references—people were talking about Web 2.0—that this would be useful and whatever. And I respond with this really enthusiastic message, but it includes a lot of stuff about how there's going to be people who aren't going to like this and it's going to change the entire way we're doing business. We've got to really rethink everything, and blah blah blah. And he basically writes back and says, "Yeah, now that you've let the cat out of the bag." And it did.

And, indeed, there was resistance. It was trying to figure out, could you allow a board member to post on the MLA blog without having it reviewed by headquarters first; who had to approve things; how much information could you really get out—all that stuff. So, it was a slow process of—

LF: But we were going through the same thing at EBSCO.

SP: Every organization was.

LF: You know, online, who gets to speak for EBSCO? And I don't know that they ever resolved that, but Joe Blow could not just go on there and say, "This is..." because that happened a couple of times and it was not their business to—they got in trouble. We were thrashing around the policy on our end.

SP: With all of my involvement with MLA, there were only two things that I ever really wanted to do, and they were to edit the *Bulletin of the Medical Library Association* and to deliver the Janet Doe Lecture. Everything else that I did—and many of them were things I ended up doing—but everything else I did was because I was asked and I saw an opportunity to do something useful, because I thought I had the skills and abilities to do that. But the two things that I did for myself were to be the editor and to deliver the Janet Doe Lecture.

I remember thinking about being asked. We were at an AAHSL meeting in New Orleans, and I think you were the AAHSL [president], and I remember you coming up to me—I think we were actually in the lobby waiting to go to a reception or something—

and you asked me if I would be the chair of some committee, and I forget which one it was. And I startled you by immediately saying no. And I realized I had to back off. I think I explained, given everything else that I had going on at that point, I had learned that I had to be somewhat cautious. And I said, I would be willing to serve on that group, I think I could contribute to that, but this would not be a good time for me to be the chair.

RF: It was an AAHSL committee and I don't remember which one, but you're right, because I had thought, Scott's a great guy to do this. He's always willing to do things. And so I was startled.

LF: Well, if you want something done, ask a busy person because they'll get it done, but a really smart, busy person knows when they have to say no. That happened to me. There was one Southern Chapter committee that I was on and there was a massive project that I would have had access to the data at EBSCO, but I just did not have the time. Jett McCann was on the committee with me, and I think he may also have been working at EBSCO at that point, and the chair of the committee was trying to persuade me, and Jett jumped in and said, "You don't understand. She can't do this project sitting on an airplane, which is what she's on most of the time." So, thank you, Jett, you saved me.

SP: I think we both, in trying to juggle all of these things, did have to develop the skills over the years to know when to say yes and what to say yes to. That's a delicate balance because one of the things that you tell young librarians about how to advance is, say yes when people ask you to do things, say yes.

LF: Yes, volunteer. Ask to be on a committee.

SP: If you're not sure if you can do it, give it a try.

RF: [Learn] some things you don't know.

SP: Right, which is all good advice. But then you also have to know how to manage and balance your responsibilities.

LF: I want to put in a shout-out to Carla Funk, because as the executive director of MLA—I don't know what I was expecting, and I knew Carla pretty well before I got on the board—but when you really saw her in action was during the board meetings. I realized, because Carla made it clear, that she was not there to run the organization, and that was kind of different from what we'd seen in the past. Was it Ray Palmer? She was not there to run the organization; we were. She was there to guide us through the process and help us with the resources she had. And she had such a calm demeanor. I have picked up, "It'll be fine, it'll be fine," which is what she would say when there was some inevitable crisis looming on the horizon. And she had a great staff—Ray Naegele...

SP: [inaudible] Evelyn Shaevel was fabulous. I think I had a somewhat unique opportunity because I did the *BMLA/JMLA* for six years right before I went on the board, and so I had a nine-year stretch as editor and then MLA board.

LF: Where I was an MLA widow, basically, because he spent every spare moment.

SP: I had a nine-year stretch of working closely with headquarters staff and seeing how Carla managed the staff and worked with the staff and worked with the board. And one of the things I was concerned about in taking on the *Bulletin* was editorial independence, which I felt was really, really important for what I wanted to do. She made it very clear right away that she really understood that, and she understood what was required, and she understood what the role of the board was in relation to the editor and all of that. It was great working with headquarters staff and working through all of that.

LF: The only time she was adamantly opposed to a board action, and I can understand why, was when the board voted to take the *JMLA*, or maybe it was the *Bulletin* at that moment, to take it electronic on PubMed Central, because she knew we were going to lose all the subscription revenue. But we felt, as professionals, this was something we had to do. Put your money where your mouth is. And it was important. She didn't like it. She made it clear that she did not like it. But she figured out a way to make it work.

SP: As it turned out, I did an analysis near the end of my term, and it was still getting a fair amount of subscription revenue, because the print version [was still also available]. There was plenty of time for the association to figure out how to adjust with that.

LF: Yes, it wasn't like she had \$100,000 slashed off.

SP: Also, unlike some societies, the revenue from the *JMLA* was really not supporting anything else. I think I did a calculation in the first year before we put it up on PubMed Central, the actual revenue over expenses was about \$10,000. Now, certainly, you didn't want to lose that, given that it was a tight budget situation, and you didn't want to lose it fast. But even by the time I left as editor in 2006, I think we still had revenue over expenses.

RF: Carla certainly was the consummate association manager. She knew all the roles, she made it clear to her staff what they were supposed to be doing and who was making decisions and what their role was in supporting them. She was truly one of the most selfless people, and willing to just say, "I'm just here to do what you want. Tell me what you want."

SP: At the same time, I think, again, having observed her over nine years, so getting to see her work with not just the three presidents that I served with on the board, but six other presidents preceding that—some of whom are really great and some of whom are looking at something on their resume and don't really have a clue and don't really give it a lot of time. She knew how to make those people successful. And she knew how to take people like Jean Shipman or Mark, who really had a lot of good ideas and a lot of energy, and give them support for them to be successful. Because it was important for the organization that the president be successful.

RF: Yes. And she knew how, in situations where there wasn't a strong or attentive president, how to still make the association successful.

LF: Yes. No naming names [laughter]. And it's tough when you only have one year as president to accomplish everything you want to accomplish, because there are the inevitable task forces that have to be established if you're going to try something new, proof of concept, etc., etc. So, yes, she was patient.

Mary Langman is another one, and Kate Corcoran. Wow. Yes, it was a great staff. I loved working with Ray Naegele, because I was the one at EBSCO with whom he would negotiate what we were going to support at the annual meeting. And it was an interesting kind of—again—fulcrum position because I had to convince, I guess it was Joe Weed—he was our head of corporate communications and I think he had the money; I don't really know. But I had to convince the right people at EBSCO that if we sponsored at this level, we would get this kind of visibility, or we would get this kind of recognition, or whatever. It was a back-and-forth, okay, Ray, we can give this much if you can let us do so-and-so. He was fun.

SP: I want to get back to Ray shortly for a different reason, but I want to make—again, thinking about the questions that you sent—to get back to the Janet Doe Lecture for a minute, because I think one of the questions that you had was, almost everybody who gives the Janet Doe Lecture talks about what a great honor it is, but also just what a terrifying prospect it is. I think most of the Janet Doe lecturers even mention that as they're getting their lecture going. And that was not the case for me.

RF: Yes, I was really interested when you said that that was one of your two big goals.

SP: And again, maybe this goes back to the arrogance that Betsy Humphreys saw in me twenty-five years earlier, but by the early 2000s, I was editing the *Journal*, I had done all of this other MLA activity, I was running this very successful library, I was doing a lot of speaking nationally and internationally. Looking at it objectively, I will be asked to do the Janet Doe Lecture at some point.

LF: You SOB [laughter].

RF: Very logical.

SP: I don't know when, but at some point—it's only a matter of time. I would be more surprised if it doesn't happen to me than if it does. I would go out for my daily walks, and from time to time, depending on what was going on, I would think, well, if it happens this year, this is kind of what I'm really interested in and this would be a neat way to shape a Janet Doe Lecture. So, there are probably three or four Janet Doe Lectures that I mentally composed that I never got to deliver because they were years in which I wasn't asked.

LF: You could do a double Doe.

SP: So, when I was asked—and despite what I’ve just said, it was a thrill and it was a great honor, and I certainly did not take it for granted—but I was ready, and I was eager, and I was so honored, and I was so determined to do a good job.

Because I had thought so much about the issues, the seed of the lecture about the great age of librarians really came out of the work that I had done editing, because I approached the editing as a literary editor would. I’ve come to realize that that was really very different from the typical scientific journal editor. The research had to be solid, the structure had to be there, but then I wanted to be sure that it was as clear and presentable as possible. And there were occasional articles where the stuff was really good but the prose was so turgid and overdone and overwritten.

LF: Our house has a two-story living room with a loft with a balcony railing about like this. And for those of you listening at home, that’s six feet-ish. His study is upstairs. And I spend most of my time downstairs in the living room. I would hear the sigh, and I would look up, and there he would be, standing there at the railing, and he will say, “Listen to this.” He would read a sentence, and I would say, “I don’t want to know who wrote that. Don’t tell me who wrote that. But it’s bad. It’s really bad.”

SP: But my goal was always, I would never rewrite something on my own. It was always, how can I get this person’s voice out, how do I get it in their words. Every edit, every change I made was approved, and some of the articles I had to go over almost sentence by sentence with somebody. And at least the feedback that I got was generally positive, but who’s going to say, I really don’t like—

LF: —I’m pulling my work.

SP: I remember that we got an article from Carol Tenopir one time that Carol and Don King had done. And, of course, they had done this long—decades of research about the information-seeking behaviors of people. It’s a fabulous record and it’s so important and the work is so solid and it’s so good. So, I was thrilled to get their contribution, and I knew when we got it, of course, we would accept it. I sent it out for the reviews, and the reviews came back, and they were generally pretty positive, a couple of questions that would need to be clarified. But then when I got to the point of doing my work, there was one chunk that I thought, I know what you’re getting at here, but I’m afraid that a lot of our readers are going to get lost. I think Carol was startled when I sent the reviews back and I said that there’s this section that we need to work on. It took me a while to get her to understand. She and Don had been doing this for so long, it made complete sense to them.

LF: Yes, she was speaking her own language.

SP: She was speaking her own language. I really approached it that way and I read everything to that level.

One of the things that started to really stand out for me was, the standard way of talking about a project that had been done was to talk about what the library had done. I thought, this is the self-effacing, don't-call-attention-to-ourselves thing that librarians do.

LF: Well, my first MLA meeting in San Antonio, when Sarah Brown was president, the theme was, 'Expanding Roles for Health Sciences Libraries'—not the librarians. It's like, the building is going to get up and dance.

SP: Right. So that really became my theme. I started to work with some of those articles, and where I thought it made sense, and if the authors were willing, to make some of those changes to librarians and to try to start to emphasize the people. Because what I was seeing, of course, from my own work at Lister Hill was the library was becoming more and more the building and the place and that was still important, but it was the librarians who were going out there who were doing the work and they were the ones who needed to get recognition.

LF: I was riding a similar horse at EBSCO, telling the sales reps, don't talk about when the library buys this or when the library selects that. Some individual librarian did that.

SP: So, when I had the opportunity to do it, I had my theme. [Editor's note: Plutchak's 2011 Doe lecture was titled: "Breaking the barriers of time and space: the dawning of the great age of librarians."] I did a fair amount of reading, but I also, by that time, I had edited six Doe Lectures, some of which were very easy to edit and get into the *Journal*, many of which were far more challenging because they had been presented as presentations. Because we didn't write papers anymore, we didn't deliver papers, we did presentations. I was determined that mine was going to be written, and I was going to write it as a paper. I did multiple drafts. It's the only presentation of all of those that I had ever done over the years—it's the only one that I ever actually wrote the whole thing out.

LF: Ah, Warsaw.

RF: Wow.

SP: But I didn't deliver it that way. I had so much fun with it. It was fun to do; it was fun to write. This is where we will get back to Ray in kind of an oblique way, because I knew that the lecture was going to have to be absolutely well-practiced and I needed to have it thoroughly down if I was going to deliver it with the kind of passion and confidence that I wanted to—because I knew that I was going to be delivering it the morning after the annual Bearded Pigs gig. That meant that the night before I gave the lecture, I was going to be doing a two-and-a-half to three-hour rock 'n' roll show followed by three hours of coming down with whiskey, so I was going to have four, maybe five hours of sleep and be going into the lecture hall with a pretty serious whiskey hangover in order to deliver the Janet Doe Lecture.

LF: He was right, too.

RF: And maybe sore vocal cords.

SP: Yes. I was ready for it and I had a great time. But the connection back to Ray and what has to not be lost is we are also so grateful to him, because he was absolutely instrumental in the Bearded Pigs coming together in the first place... Lynn has handed me a sheet of notes for the genesis of it, and this is pretty close to my memory of it.

LF: Oh, were you there [laughter]?

SP: So, the first bit—as she says—it could be said that the genesis of the Bearded Pigs was at the 2001 Orlando meeting, when Scott brought his guitar to the Armadillo Ball, and he and Marian, Lynn's daughter, did an impromptu set. And this is true, and we had a good time. I had been invited to bring my guitar by Scott Garrison, who I believe you know.

RF: Yes, I do.

SP: Scott used to get together with people from his generation at the MLA meeting for, I think, margaritas or whatever.

LF: It was margaritas. They had a blender in their room.

SP: He and I were going to get together and we were going to play for his buddies, and Marian, Lynn's daughter, was actually going to be there as a babysitter for his little kids—for the boys. However, when we get there, Scott and all of the people his age, who now all have these little kids, they're all crashed. They couldn't make it through the evening. I'm all ready to play and I've got my guitar, so we go and crash the Armadillo Ball, where they have a suite, and take over a corner of the room. Marian and I sing some songs because we'd been doing some performing together, and we have a great time. Out of that, the next year's meeting [2002] was in Dallas, and so SCAMeL did a great, big Armadillo Ball.

LF: SCAMeL is the South Central Academic Medical Libraries [Consortium], so it's the directors, mostly, of the many academic libraries in that five-state area.

SP: And they would always put on a party called the Armadillo Ball. Being in Dallas, they had a really big suite; they put on a really big deal. They asked if I could put a band together for the Armadillo Ball. It was going to be Scott Garrison—and Bruce Madge and I by that time had done just a little bit of guitar stuff together, which is a whole other great story that we're not going to be able to have time to go into. Scott knew Rick Peterson, who was at Duke, who was a drummer, and suggested that he bring some congas and he come along. Scott, then, couldn't make it to the meeting because he was having another kid. We decide to have a rehearsal in Lynn's and my suite, and Bruce shows up, and then Rick Peterson, who I knew just slightly, arrives, and behind him is

this young man who I've never laid eyes on before, who was Roger Russell. We run through six or seven songs, and it actually sounds pretty good.

We go off and we do several hours of the Armadillo Ball. At that time, it was basically me doing my solo singer-songwriter stuff with these other guys; so, with two other guitar players and a guy playing congas kind of providing backup support and maybe a little vocal, if I happen to play something that they knew. We had a huge crowd. I remember Kent Smith sitting cross-legged on the floor in the front watching and having a great time—Kent Smith at the time being deputy director of NLM and not exactly the person you would be thinking of first as sitting cross-legged on the floor watching the band play. We had a great time.

The next year in San Diego [2003], and this is where I have to add a little piece—we're going to try one more time for Scott Garrison and I to actually be able to play together since he fell asleep when we were in Orlando and he didn't make it to Dallas. We go over to his room at whatever the elaborate resort was that we had the meeting—

LF: Oh, it was at that weird resort [Town and Country Resort & Convention Center]. We were out there in the suburbs that time, spread out—

SP: Lynn and I go over to Scott's room and we start to play, and we get, oh, through three or four songs, and security is banging on the door and we shut down because we're too loud. I go and find Ray, and I say, "Ray, could you possibly arrange with the hotel for us to have a meeting room this evening kind of out of the way where we could get together and play some music?" and Ray makes that happen. He could. We get together and Bruce and Scott and me and you—

LF: Yes, I think I was playing the water bottle or whatever I could make percussion instruments out of—glasses...

SP: A couple of people found out and we played, and I think six or seven people came and somebody brought a six-pack and we had a wonderful time. The next night was the banquet, and there was this local band that had been brought in. I was talking to Ray the next day—thanked him for arranging the room. I said we had a really good time, a lot of fun. And he said, "How would you like it if I see if you guys can play during the band's break at the thing tonight?" and I said, "Oh, yeah, that'd be great."

Sure enough, the band took a break and we got up. Rick, who, again, had just brought his congas, he was actually able to sit behind a real drum kit. We had Rick on drums and Scott on bass and me and Bruce with guitars, and so we did, again, four or five songs. Then, when the band broke up, we were still kind of pumped and ready to go, so we actually set up just in the corner of the ballroom and played after the official band was done. Again, maybe a dozen people or so stuck around and we had a great time.

LF: Lucretia [McClure] was in the house.

SP: Yes. The next day, Lynn and Bruce and I went to the San Diego Zoo just to do sightseeing. And very pumped about the night before. Every year we're doing more and we're having more fun, and next year it's going to be in Washington, DC, and we really need to see if we can do this again. We can talk to Ray, and Ray can get us a room.

LF: We need a name! Briefly, after the Dallas thing, it was Armadillo Juice.

SP: Fortunately, that didn't stick. We're going through San Diego Zoo. And again, we'd been up late the night before, so we're all a little toasty and a little giddy. We get to a pen, and there is this long, shaggy creature with this long snout nose. Lynn looks at the sign and she starts reading the description. Do you remember the description?

LF: Yes. "Led by an old male, the bearded pig is the only swine that undertakes an annual migration. They travel in packs by night, stopping in thickets to rest during the day." And I'm thinking, well, yeah, the party animals at MLA come out at night. The thickets are the contributing papers where we're all just kind of listening politely.

SP: The band is led by an old male, and we all undertake an annual migration. And she said, "Bearded Pigs. That is the name of the band." So, we thought that was great.

Indeed, when we get ready for DC [2004], I talk to Ray and I say, "Can you get us a room again?" He says, "Absolutely. No problem." And if you remember the Washington Hilton—I think it's on the upper level, there's one long hallway that goes all the way down to the back and there's a meeting room way back down in the corner. That was the room he got for us.

LF: Yes. The international reception was in there. He said, "I'm just going to have them leave whatever food is left over." Okay, that's great. We weren't planning on providing refreshments, which is an important point in this story.

SP: We put up one poster—Bearded Pigs. And I think Rick actually did the poster.

LF: Rick did the poster. I drew the logo.

SP: We put up one poster and put up a little sign with an arrow pointed down the hallway, and we told a few people that this was going to happen. And again, we thought, this will be great. We'll get another dozen people who will come down and we'll play and we'll have a good time.

At that point, Tom Richardson, from the *New England Journal of Medicine*, had been getting more involved with the work that Mark Danderson was doing. Danderson was still at *NEJM*, but we were connected more with Tom. Tom, unbeknownst to us, was also a guitar player and actually had done, when he was in college, the same kind of thing that I had done in college with a lot of coffeehouse stuff, whatever. He asked if he could bring his guitar and sit in. I said, "Sure, why not?" And I cannot remember how we

handled the equipment. Oh, probably, Scott Garrison brought the gear, because he would have been able to drive up from Duke—I think he was at Chapel Hill at the time.

LF: We didn't have a lot.

SP: No, we didn't have a lot. And I think that Rick was still sticking with congas. I don't remember if he had a drum kit that year.

LF: We can look at the pictures.

SP: Anyway, so we go and we set up. And a lot of people came.

LF: The room was shoulder-to-shoulder.

SP: When they saw that there were no refreshments, some people went out to the bar and got drinks and brought them back in. Then some people went to the liquor store across the street and bought six-packs or liquor bottles and brought them in. And we had a wonderful time and it was a great party. When it was all wrapped up, we did, I think, a reasonable job cleaning up after ourselves and getting everything into waste baskets, straightening up the tables and chairs, but we did not haul the stuff out.

LF: So, the beer bottles, etc., were in the trash, which was overflowing because there was—

SP: There was a lot of that going. So, two days later, I ran into Carla in the exhibit hall, and she said, "Oh, I need you to go talk to Paul [Graller]," who was the guy we contracted with to do the exhibition management for the association for the annual meetings. "I need you to go talk to Paul about your little event the other night, because we need to get your side of the story before he goes back to talk to the hotel." And I go, "Oh, okay." I go and find Paul, who I did not know well at that point, although we got to know him pretty well over the years. And he says, "Well, the hotel says that you trashed the room and they want to charge us \$8,000 for it," and I'm like, "Oh, my god." Part of us is going, "Ah, yes!"

LF: We trashed the room [laughter]!

SP: And part of me is just, "Oh, my god, what have I done?"

LF: You would think that we had torn the curtains off the wall or chewed up the carpet.

SP: I explained what had happened and what we had left behind. Paul is used to working with hotels, so he knows, okay, hotels hate it when you bring stuff in. The hotel had probably sort of figured out what they would have gotten if we had actually catered it in and decided what that charge was and then doubled it because we hadn't cleared it and came up with some sort of a bogus number. I don't know what it was that MLA actually

had to pay and how they ended up finessing that, but at that point we still wanted to do it. And to Carla and Ray's great credit, they were still willing to let us do it.

LF: Yes, they considered it a professional networking activity, which is how they listed it.

SP: What we worked out was, we would arrange the room through Ray so that we would be able to get a room without there being any charge—the room was part of the MLA block. Mary would arrange to have that be the room that was used for the international visitors reception, so that whatever food they have laid out would be left over. Then I would work with the hotel catering to handle a cash bar. We would be on the hook for whatever needed to be recovered for the cash bar, and typically, the way the hotels worked, there was a minimum, and as long as we covered the minimum, then there was no charge. It was relatively small risk on our part.

LF: I talked Joe Weed into letting us ship a pallet-worth of band equipment on the EBSCO exhibit Mayflower van—which I don't think anyone other than Joe and Madeline...—and every year we would arrange for a house stop. We'd take the biggest vehicle we have and load all the amps and the mic stands and everything and take it out to whatever exhibit company that EBSCO worked with in Birmingham, and they would put it on a pallet with EBSCO host terminals.

SP: We would end up renting some stuff. We'd usually have to rent drums. And every year, it just got to be a bigger deal. It was the fourth or fifth time when we're playing and there are people dancing, and I look up and I realize there are more people in the room that I don't know personally than people that I do.

LF: That's why we started the Thicket Society, because we needed to be able to fund the rental of the band equipment. Like we couldn't ship the drum kits around, so we would rent the drum kit and the monitors and some other things.

SP: Joanne Marshall was the one who first suggested something like the Thicket Society. Again, the first year, we thought, well, we'll do this and Lynn will design a T-shirt. If we can get ten or fifteen of our crazy friends to pony up forty dollars or whatever, then we can make this work.

LF: And a button. You got the button, too.

SP: We can make this work. And we got way more than that, so we had to do a lot more shirts. And every year it got bigger. We would do it on Sunday night, which is the night when there were no official MLA events.

LF: It was vendor entertainment, unofficially.

SP: We did hear, after a while, from the Ovid folks, that they were a little concerned that we were competitive. They tried one year to hire us, because they thought that would

solve the problem—they'll sponsor the Bearded Pigs. Then we said, "We can't do that because we're an open access band."

That would be part of my shtick. Part of the shtick that I would deliver was, we're an open access band, which means you get to hear the music for free. But we still have expenses that have to be paid for, so we need you to drink a lot so that we don't have a bar change. And, oh, be sure to tip your bartender because you're all having fun, and he or she, they're working. Then we would have an open guitar case and we would say, to help us cover the costs, if you haven't bought a T-shirt, you can throw a couple of bucks in the guitar case, and once we have recovered our expenses, everything else goes to the MLA Scholarship Fund. And so, most years, we were able to cover our costs and give a hundred or two hundred dollars to the MLA Scholarship Fund.

And every year it got bigger. And every year it got bigger. We got to 2009, 2010, and I was starting to think, it's getting time to bring this to a close, because it's starting to be a lot of work. There are a lot of T-shirts, there's a lot of organizing, there's a lot of keeping track of money and who's there. It started out as a way for Scott Garrison and Bruce and I to jam together at MLA, and it's been fun and it's clearly been a joyous thing for a lot of people. But every year I would start to think...

We got to 2013. By this time, Bruce was no longer working in a library. I had had my attack of transverse myelitis, although at this point, we were still thinking that I was probably going to recover. But we got to Boston and the band got together the night before we played, and I said, "I've really been thinking about this and I think this needs to be the last one."

LF: At MLA. Because we were playing other little things, too.

SP: I said, "This is great, but the only reason Bruce is coming over from England is to do this gig. He has no other reason to be here. It's gotten so much bigger. This is really not what we signed up for. And I would really like us to end on a high note." And everybody was like, "Yeah, okay, that makes sense and we're ready to do that."

That year, we had actually hired a sound guy along with all this stuff. I couldn't play guitar that year, but Roger Russell, by that point, knew all of my guitar parts, so he was able to do that. Scott Garrison was no longer with us, but Tom Richardson had picked up all of the bass stuff. It was the year of the Boston bombing, which had happened just weeks before, and we were in Boston. And Tom Richardson, who was now playing bass, is from Boston. So, we said that this year, instead of excess going to the Scholarship Fund, this was going to whatever the Boston—

LF: One [Fund] Boston.

SP: Yes, there was some fund that had been set up. And it was just a fabulous gig. The fact that we had the professional sound guy, we probably never sounded better, and we just had a great time. As it turned out, a day or two later, Rick Peterson told me

privately, because he was not making it public, he was actually getting ready to retire, and so he wouldn't be coming back to MLA anymore. Bruce had kind of gotten to the point of realizing that he was not—

LF: He couldn't.

SP: And as it turned out, I continued to get worse and worse and worse, and probably, by 2014, would not have had the stamina to be able to do a whole two hours of standing behind the mic singing. So, I felt really, really good that we called it to a close on our own terms.

RF: And at the right point.

SP: Rather than thinking we were going to do it another year and then having to say—We were able, in the Boston show, to say, this is the last time we're going to do this at MLA. This has been so great. Thank you all for all the support, etc., etc., etc.

I think the Bearded Pigs are important within the stuff we're talking about. It goes back to the comment that Lynn made about my objection to the work-life balance issue. And it goes back to something that I said earlier about doing stuff on my own time and what is my own time. What I had come to in my life was, I was a librarian full-time, I was an amateur musician full-time, I was a spouse full-time, I was a grandfather full-time. I had all of these aspects to my personality, and they all fed into each other and supported each other.

Doing the Bearded Pigs was a way for us, as fairly prominent people in the profession, very successful people in the profession, to show that there was more to us and more to our lives. I wanted the young librarians to see that, and I wanted them to come to the Bearded Pigs gig in Minneapolis on a Sunday night and then to see me delivering the Doe Lecture the next morning.

LF: [Laughter] How does he do that?

SP: Ray and Carla talked about the Bearded Pigs as informal professional networking event with rock band, and that's what it was. I think that that was one more way that I hoped we helped to affect people coming into the profession in a positive way, as well as providing a fun evening for—

LF: For all of us. We were just doing it for ourselves. And the big advantage for us—he talks about two guys coming to our suite door and never met them, and thanks to the generosity of Tom Singarella and his late wife, Susan, who hosted for us for many years an annual band camp at his house—we would all go to Tom and Sue's house, they would cook us fabulous food, we would play bad music for most of the weekend, and then he would host a party, where we actually cleaned up our act and performed. But those friendships are beyond anything we could have gotten out of our professional contact.

RF: And I think it is interesting, because you two have modeled so successfully for other people coming up in the profession—what to do as productive professionals, as thoughtful professionals. But then you also modeled being well-rounded.

LF: The fun side!

RF: Yes. That's a valuable lesson as well.

SP: Yes, I think that's what we had hoped. I think almost everything that I have done that has been associated with the profession has been intentional. How does this fit into this bigger picture of what I'm trying to do and am trying to achieve, and is this helping me pay back the investment that NLM made in me.

LF: I think the balance is tipped in your favor. But that whole experience and our standings in the profession got us invitations to like the conference in Melbourne, Australia, where the Bearded Pigs played at the banquet, or when—I can't remember the official name, but basically the Scottish Library Association [Chartered Institute of Library and Information Professionals in Scotland] paid us to fly to Scotland and play at their—and we're all looking at each other, "I can't believe this! What, are these people crazy? We're not that good!" But they used speaker fees because you spoke, and Tom Richardson spoke. That was the other thing about the Bearded Pigs: There were three to four American librarians, a British librarian, a vendor, and a publisher. So, it was kind of a little representative group.

SP: Again, bringing all of those different pieces together.

LF: Yes, what fun. So, what else do you want to know?

RF: Is there anything else you would like to say about MLA activities or AAHSL or the Southern Chapter or any of those professional relationships?

SP: Couple of things. When I was involved with the Midcontinental Chapter, which was my first chapter, that was one that I really used as an entry to the profession, which I think is where the chapters are really, really helpful.

LF: Exactly.

SP: I edited the newsletter there, I made connections, and started to understand how associations worked, and that was great. By the time I went down to Birmingham and joined Southern Chapter, I had started being very active nationally, and so I was less active in Southern Chapter directly. What I saw my role being was to support my librarians and to support the chapter itself, because of the benefit it gave to the librarians. That's where I saw my role—to help support the chapter itself by encouraging my staff to participate as committee members, as leaders, and by providing them the opportunity to grow professionally by being involved. And I thought that that was a very, very important role and an important responsibility for library directors to support their

chapters. I know that that view is not universally held among the academic library directors, but it was a big deal for me.

During my time at Lister Hill, Lister Hill librarians were always very involved in Southern Chapter. I used to joke that one of the best ways for me to find out what was going on at Lister Hill was to go to the poster sessions at Southern Chapter, because that's when I would really see the projects. And literally, I would see really cool posters about projects that were going on that I didn't know anything about, because the environment that we had set up, people had kind of worked out, these are the things that Scott needs to know about, these are things he doesn't need to know about. We certainly don't need to ask his permission to work on a project about something that we're going to present at Southern Chapter, because it is expected that that is the stuff that we [do]. So, that was my involvement with Southern.

I got to really see the transformation of the AAHSL organization in a way that I am not entirely happy with. The first half I'm really happy with and then the second half I'm less happy with. Judy Messerle brought me to the AAHSL meeting, I guess, in '87, when I had first gone to SLU, and that was highly unusual, because AAHSL was for the directors. And I might have been the first associate director who was ever brought, but Judy felt that that was important, and Judy being Judy, she was happy to buck tradition to have me come along.

LF: Well, originally, wasn't it AAHSLD?

RF: Yes. Directors.

SP: You are correct. But she wanted me to start to get that experience. It became AAHSL when we started the Nina Matheson Lecture, because there were tax issues involved and we actually had to spin off a different organization in order to maintain tax-exempt status.

There were no committees when I started. There was no electronic communication. Wayne Peay set up an email discussion list, which was a brand-new thing, a Listserv, as they were called. Nobody but Wayne knew what such a thing was, and Wayne, of course, would be the one who would get it going. That had a tremendous impact for the directors to be able to have that kind of communication. I think Judy had to really lobby to get me on that list, and it might have taken a while before I was allowed to be on that list because I was not yet a director.

RF: Oh, I'm sure that's true, because the directors quickly picked that up as a way to share ideas on issues, and we don't know that we want someone who isn't a director to be able to see our—

LF: Right. We don't want our underlings to see this.

SP: AAHSL was founded—and I became deep in the history later on because when I was *JMLA* editor, we published a [symposium in the April 2003 issue] which was the history of AAHSL. I believe that it was Gerry Oppenheimer who was the initial instigator. The vision was to connect the directors more closely to AAMC, because he recognized that in order to get those important seats at the table, the directors needed to be able to interact as colleagues with the administrators of their schools.

All of the deans get together and all of the department chairs get together and all of the finance people get together. AAMC brings all those folks together. He and the people who helped developed that recognized that if we could get the directors to be seen as part of that club, that would be to the benefit of all the directors. You went to the [AAMC] meeting and there was a very brief [AAHSL] business meeting because the only thing that the group was doing was the statistics [*Annual Statistics of Medical School Libraries in the United States and Canada*]. And there was a reception after the business meeting so that we could hang out and have drinks, and then you spent the rest of the time, the way I put it, eavesdropping on academic medicine. It was a great way to find out what were the issues in academic medicine. And you could run into the dean of your medical school in the hallway and there you both were.

LF: Yes, and he might say, “What are you doing here [laughter]?”

SP: Right. So, that was the organization that I became a part of after Judy left, and I was a director, so I could now be part of the club. Over the next ‘x’ number of years, the organization grew, the organization became more ambitious. I don’t know where you were in terms of the big dues increase kerfuffle—

LF: Oh, when you lost some members.

SP: We lost some members. There had been a strategic planning process, and I think the strategic planning process was really well done and thought out. The leadership during those years really thought, there’s really a lot that we could do. The strategic planning process identified all of these things that we could do and then it was a recognition that if we were going to do these things, we really needed to have more resources. The med schools are spending thousands of dollars in order to be members of the AAMC. Surely, we can be spending more than 500 bucks a year, whatever the dues were. I think they went from \$500 to \$1500.

RF: That’s correct, and it was very controversial.

SP: And it was very controversial, partly because it was—I don’t remember all the specifics, but it was kind of decided by the board and presented to the members without a whole lot of vetting.

RF: That’s correct. It kind of hit the membership cold. And I think it was almost around the twenty-fifth anniversary, because the strategic planning process got started because people scratched their heads and said, “We’ve been here for a long period of time and all

we have to show are the statistics and showing up at another meeting—and surely we could do better than that.”

SP: I’m supportive of that notion, and I was supportive of the strategic planning process, and I was definitely supportive of the dues increase. It all made sense. What came out of that, of course, as organizations and bureaucracies will, was a lot more committees, because now we had resources and we had things to do and we had projects and we had ideas.

When Judy was still there, we had added the educational component, so there was a half-day workshop the day before, which, again, made a lot of sense; you’ve got everybody together. I remember the very first one was at the meeting in DC, and the topic was, how do we evaluate the quality of what we’re doing so that we’re not just counting stuff. I believe that is still a topic of discussion for AAHSL.

RF: That didn’t take off, did it?

SP: Well, we have continued to try to figure it out. So, then, there was the educational component to come in for, which was okay because that was still the day before the regular AAMC programming started. And we had a representative on the Council of Academic Societies, which was very important. But then we had to have more committees, and then the committees had to meet, and you had to fit the committee meeting time in.

By the early 2000s, I think, as new directors were coming in, they were going to the AAHSL meeting, which happened to be happening at the same time as the AAMC meeting. Maybe they went to see a couple of the big-name plenary speakers, but they didn’t have time to go and sit in on the curriculum meetings or some of the other issue meetings or to see some of the presentations or [Group on] Women in Medicine [and Science]—all of the really interesting things that are going on at the AAMC meeting—because we had all of our committee meetings to get to. And this notion of going and eavesdropping on academic medicine, there wasn’t time for that anymore, because we were doing the AAHSL meeting.

And then, AAMC started going through their shift. I was not close enough by this time to understand all the politics, because when the Chicago Collaborative faded out, that was kind of the end of my AAHSL involvement. I was disappointed with how AAHSL had handled it. I was involved in a lot of other activities, and I was just not putting energy there and paying a lot of attention to that. I was still getting to the meeting and I was still participating as a member, but I was no longer involved. AAMC made a change in their programming structure, the result of which was that a lot of the AAHSL committee activities and AAHSL-sponsored activities could no longer happen during the main AAMC meeting dates. They ended up getting shifted to the days before the full AAMC meeting—which meant you now had two or two-and-a-half days that were entirely AAHSL focused, followed by three days of the AAMC meeting.

You started to find directors—and now associate directors, because by this time they had brought that additional tier in, which, again, was very good, something I lobbied for very hard—but you had people coming in for the AAHSL meeting, and then instead of the expense and the time of another three days, leaving and not attending the AAMC stuff. And I understand that and I see the way that it developed. I think AAHSL has been able to do a lot of good, but I think that they've lost that connection to a great extent, and I suspect that that has been a negative in the big picture in terms of the relationship that the AAHSL directors have in their own institutions.

There's an insularity among medical librarians that has always kind of worried me. Even the fact that we've had our separate Medical Library Association so we don't have the interaction with other sectors of librarianship. And within the Medical Library Association, it would frustrate me that so many people joined their section and that became their home. To me, the great value of MLA was, you went and you had the opportunity to interact with librarians who weren't doing the same job. But so many librarians didn't take advantage of that.

RF: I think that may be part of a fundamental characteristic of people, though. The school librarians don't mingle, and even if you just look at a city, we have ethnic groups all over Denver who stick pretty tightly together. It shows up all over. And I don't know that we're any more or worse about that kind of behavior.

SP: I think that that's probably true, but I think at a professional level, it makes us less effective if we don't push against that. I've always been one that felt that it would be a benefit for librarians to attend the meetings of the disciplines that they support. The public health librarians do some of that. There's a Winifred Sewell scholarship that you can get funding to go [to the national professional meetings of your clients]. We could go to the meeting of public health, and I think [pharmacy] or something like that. It was a benefit to me to start going to publisher meetings.

I am hopeful that this shift they're making within MLA to get away from sections and to do these kinds of affinity groups is—once people figure out what this is—that might encourage some of that cross-fertilization that's been lost, that you start to find out that you actually share issues and concerns that you come across in your role with librarians who actually have a very different role. You can learn more from them because they're approaching it from a somewhat different angle, even though you have the same issues to deal with.

LF: So you don't just join a section and that's your life.

RF: I think another face of that issue, if you will, is the question I had posed to you both earlier. You both, like so many successful professionals, have jumped into all kinds of things—

LF: Or been pushed [laughter].

RF: —wonders you had not explored before. And I fear our profession is at the low end of risk tolerance. I think part of what we do with staff development and encouraging other people in the profession is to get them to understand it's okay to move outside your comfort zone and do these things and stretch yourself.

LF: You might actually enjoy it.

SP: We go back to what I found most rewarding about being at Lister Hill. It was creating a space and an environment in which people could do that, and where they felt safe. I think that is something that directors have the opportunity to do. I think too few take advantage of that, because maybe they just don't think about it that way, but to be able to create a space where people feel safe and they can take risks and they can learn how to do that—they can fall but they know that there's somebody there who's going to pick them up and who is going to back them up.

RF: Very important. Well, as we try to wrap up... You've mentioned some people, clearly, to this point, but are there particularly important people you think influenced you along the way?

LF: Oh, definitely. And many of them were outside of librarianship. One of my early mentors was the man by the name of Frank O. Hinckley, who I met in Tuscaloosa. He had something to do with the health care management program they were getting [started]. Interestingly enough, like my father, he also had been a command-level Air Force officer. And I'm not exactly sure how he dropped into this role, but he was a big library user. We were having some difficulties, because early on at the Health Sciences Library, I had a dual reporting role to the dean of the University of Alabama Libraries as well as the dean of the School of Medicine.

Again, we were building a new library, so we were just buying stuff. I almost had carte blanche. I'm just selecting like crazy. And we would submit our selections and it would be months—months—before these books would arrive. Journals, yes, they're coming in fine, but it took us six months to get an *American Heritage Dictionary*, for Pete's sakes. And Frank was raising hell because he couldn't get the materials he needed to teach his classes. I explained, "Okay, here's the process that we have to go through [laughter]." Frank went down to talk to the acquisitions librarian at the Gorgas Library and just ripped him up one side and down the other, and then went to the dean of the School of Medicine and said, "This is untenable. Lynn has a way she can order these things directly from the medical book supplier." From that time on, he was a huge advocate for me, a great friend in some of my personal crises. And then unfortunately, I completely lost touch with him. He also knew Susan Laing; somehow their paths crossed—I don't really remember now.

Allen Powell, I mentioned, at EBSCO, who was an accountant by training and taught me almost everything I know about financial projections. I got to the point where I could write our financial projections for the next year in Allen's voice. "The possibility of hostilities in Iran that have a lasting impact on the value of the dollar..." Blah blah blah. That kind of thing.

Barbara Doughty, again, was a tremendous personal mentor for me, the reference librarian when I moved up to the chief medical librarian. She's at least a decade older than I am, and we were just really good friends. That was wonderful. Nancy Clemmons was absolutely a rock at Lister Hill, and Jack Smith, too.

As I said when I accepted the award named for me at ALHeLA, you can mentor up or down. A mentor doesn't have to be somebody more important than you, necessarily. Kathy Torrente—she was not a friend, but man, she taught me MEDLINE. That was important. Kathleen Born at EBSCO kind of showed me the ropes. She and I had very different styles, but she worked her way and I worked mine.

Scott Plutchak has been a fairly important influence on my life and my career.

RF: A long-term influence.

SP: I'm mentally going through my list, and Lynn is on my list very, very strongly. One of the things that has been so interesting and rewarding, I think, for both of us is the way that we've been able to share the personal and the professional while having these different roles. Because of what we share—just absolutely understanding the issues and the struggles that the other person is going through, but having different sets of expertise—we were constantly learning from each other, because each of us had these different, deep wellsprings of knowledge and experience. Lynn's probably deeper than mine, because you had ten more years of career on me and were a very seasoned and well-respected academic librarian when, as we said, I was still driving a forklift in a candle factory.

LF: You were a quick study [laughter].

SP: We sometimes tell the story, and this is very true—when I was still living in St. Louis and I was driving to Birmingham every opportunity I could—every three or four weeks I would come down if we weren't meeting somewhere in some other city where our travels were connecting. She was doing a lot of travel, and this was when she was very successfully getting more business for EBSCO. She mentioned whatever the percentage was. I think about it in terms of numbers. I think that EBSCO had four or five of the big 135—

LF: Big 134. We had three.

SP: They had three when she started, and a decade or so later, you had almost 100%.

LF: Eighty-seven percent.

SP: It was a huge, huge impact. Well, when she got her first big customer after she and I had started going together, as a congratulatory present I sent her something out of Victoria's Secret. And then she got another account and she got another something out of

Victoria's Secret. I just about got to the point where the person on the phone at Victoria's Secret knew who I was. I had to keep a scrapbook.

LF: He did.

SP: I cut the pictures out of the Victoria's Secret catalog and kept them so I could make sure that I did not order the same frilly negligee the second time. I remember, in particular, one day I drive down. It's just a little less than eight hours from my door to her door. I get there in the evening. She meets me at the door in some cute little yellow something that I had ordered.

LF: And they were all named after individual directors [laughter].

SP: She's got the frilly little yellow thing on. She meets me with a glass of wine. We go over to the couch, we sit down, and fifteen minutes later are deep in a discussion about serials prices and licensing issues that we're dealing with.

LF: We just know how to have fun [laughter].

SP: But that is the way that our life is intertwined. I think we've been very, very fortunate with our personal relationship, but it has been just a tremendously supportive professional relationship. I don't know for sure if I would have ended up leaving librarianship in the mid-'90s when I was ready to chuck it. Had I stayed, I cannot imagine that I would have been able to be as successful as I was—because I was so driven by that desire to make her proud of me and because she provided a degree of emotional support and confidence and encouragement that enabled me to really dig deep and take risks and try out new things and explore and do all those things.

LF: And spend every spare moment working for MLA [laughter].

I do have to tell one funny story. I alluded earlier today that I had been dating somebody who lived in Houston—I don't know if you would really call it 'dating,' but I was involved with somebody in Houston—and then Scott comes on the scene. And my daughter Marian was thirteen, fourteen, at the time, which is always a fun age, particularly for a girl. She did not like the Houston guy at all and made that clear. But then when Scott started to come down, all she knew about Scott was, he drove this cute little black sports car with some sort of animal skull in the back and he had a guitar and he played in a country band in St. Louis. I didn't dissuade her of that notion because all of those things were true. He started teaching her a little bit of guitar because she wanted to be the next Reba McEntire, so she was really impressed that I was dating this musician guy.

It's coming up on one of the MLA meetings in San Antonio. It had to have been 1994. We were writing back and forth because email was now kaput. I had a letter addressed to Scott to a hotel in San Antonio. And she says, "Why are you writing to Scott in San Antonio?" and I said, "Well, that's where he's going to be." She said, "Why is he going

to be in San Antonio?” because she knew I was getting ready for MLA. I said, “Well, he’s going to MLA.” She looks at me as only a thirteen or fourteen-year-old girl can do, she says, “Why is he going to MLA?” and I said, “Because he’s a medical librarian.” And if there had been a mic drop available, she would have done that. She said, “How long has he been a medical librarian?” He just got into this so he could go to MLA [laughter].

She and he developed a really good relationship out of that. And actually, you’ve been in her life longer than she had her father, because he died when she was twenty-six.

SP: On the theme of influences, for me, obviously, the NLM folks, Judy Messerle, Bob Braude, Nina Matheson. Nina was at NLM. She had just finished the IAIMS study. I spent an afternoon in her office, where she explained what IAIMS really was. I went into her office that day thinking it was about technology and came out understanding that it was about people.

LF: You were one of the few that had ever done that.

SP: Right, but I got it directly from Nina. Lois Ann Colaianni had a huge influence; Sheldon Kotzin, tremendous, and kept his eye out for me for a long, long time, always. Peri Schuyler, who I don’t think is as well-known. She was the assistant division chief to Sheldon at NLM when I was there. She was my official mentor. All the associates are assigned somebody as their official go-to. I think she did an early retirement [she retired in 1995]. She and her husband moved off somewhere not long after I left NLM.

People outside of librarianship, people I met through publishing: Michael Mabe, who I met when he was with Elsevier—talk about the cross-pollination, the first Charleston Conference I went to, I went because I had been involved in some retraction of publication policies. I had written an editorial. There’s a long story behind this, but basically, I was doing a presentation in which I was pretty scathing about the retraction of publication policy that Elsevier had just come up with. And the first person to raise his hand during the Q&A identified himself as the person who had written that policy. We had a somewhat tense and I’m sure very entertaining back-and-forth.

LF: You did. I was there.

SP: Michael Mabe became a good friend out of that. He left Elsevier and became the executive director of the STM association, which is the major association for the big STM publishers. He invited me to speak in Frankfurt a couple of times. He invited me to the International Publishers Association meeting [the International Publishers Congress] in South Africa. He was very supportive of the Chicago Collaborative. It’s the kind of relationship that can’t happen if you only go to medical library meetings. You have to get out.

Anthony Watkinson, who I met through the Charleston Conference who, again, is somebody who opened so many doors for me and for many other people. I think of

Anthony as the connector. He loves getting interesting people connected to other people. Fred Dylla, obviously, who got me onto the Scholarly Publishing Roundtable. A guy named Geoff Bilder, who works for Crossref, who is absolutely the most brilliant person I have ever met, who understands the technology of people and the intersection between publishing and technology, just somebody who I had an instant connection with from the moment that we met.

And then, as Lynn says, the influences and the mentoring go in all directions, so Gabe Rios has had a tremendous influence on me, Liz Lorbeer, Pat Higginbottom, Mike Flannery—the key people who I was able to work with. There's a young man, LeAndrae Graham, who still works at Lister Hill. He's a paraprofessional and has been there for a long time. Probably came in about the last third of my time there. He was just a brilliant, wonderful guy. If you listen and you're open, you learn things from everybody; everybody teaches you stuff.

In the profession, Wayne Peay, you, yourself [Forsman], all of the people I've had a chance to interact with and work with, and see the different styles and the different approaches. How does this person interact and what is their personality like, and maybe I can't do it their way. My personality is so different from Bob Braude's, I could never do things the way that Bob did, but I saw the results that he got. So, what is it that he did and how was the way he interacted with people, and what values did he express, and how can I incorporate them into my own way of interacting in order to try to get those same results.

LF: And then there are a cast of characters who shall not be named that we learned a lot from in unpleasant ways because we learned what not to do. And I've had enough of those to last me a lifetime. You've been pretty fortunate.

SP: I've been fortunate in that I don't think I've ever had a bad boss. I've had some who were easier to work with than others, but I've always been given a lot of freedom and I've always gotten a lot of support where I needed it. So, I consider myself to be very fortunate. Again, going back to my experience at Lister Hill, organizationally, I just lucked out.

LF: Well, you made good choices of good people, quality people. That's not luck.

SP: My mother and I used to argue about this all the time, because I consider myself to be an unbelievably lucky person. At every important step of the way throughout my life, it seems to me that good fortune, through no fault of my own, has played an important part. And my mother would point out, I think what you just pointed out, which is true—then what do you do with it. I think I have been good at taking advantage of those.

LF: This is also why you have not been crushed by transverse myelitis, because you consider yourself to be a lucky guy.

SP: Right.

RF: And some people would have let that stop them years ago, so... I think a lot of the results we get are the attitude that we start with.

LF: And you've had some dark moments, but you got past them. There will probably be dark moments ahead.

RF: Are there people who you each feel you've had a big impact on?

SP: I know that the reason ALHeLA named that award for Lynn was the recognition of how many people she has influenced over her career and how important that has been. And I know that of all the stuff you've done, that's what gives you the greatest pleasure and the greatest pride, is looking back at all of the big and little ways in which you have influenced and helped people.

LF: Yes, and there were many, and still are many people, at EBSCO who I know I was instrumental in where they are now at EBSCO because of mentoring. The same thing is true at Lister Hill. Nancy Clemmons, I'm sure, I had a big impact on. Errica Evans, I couldn't believe how effusive she was in all the things that she [said]. She was a paraprofessional in my end days at Lister Hill twenty-five years ago. That was shocking to me—she's now the president of ALHeLA, and she's up there giving her talk at the meeting and she said, "And I'm not even a real librarian, but Lynn said I could do this."

SP: I think we don't always realize how much impact we can sometimes have in very small ways and small instances. But it also reminds me—I think back to that first MLA meeting that Neil and I went to. We're meeting all of these big-shot librarians who were probably—I was in my late twenties and Neil was a couple years older, and these folks were probably in their forties-ish. They were seasoned and they were experienced and they had the answers and they had the advice and wisdom. And fifteen years later I'm thinking, what a load of crap! They were making it all up! They didn't know anything more than I know now!

RF: They were muddling their way through.

LF: Oh, one thing I will say, and there were so many instances of this I can't even recall but a few names—one of the things that I would do, when I got to know directors, I learned, not from any kind of skullduggery, who had openings and what capacity. Then, when I would go to other libraries, I could say to the director, "Have you considered so-and-so for this position? I think he or she might be what you're looking for." There was some Lynn Fortney-ing behind many of the scenes, because I could match up. And given the regionality of MLA and because I was a member of so many chapters...

I remember recruiting Liz from Loyola [Lorbeer was at neighboring Rush University Medical Center] for the acquisitions librarian at Lister Hill in the first place, because I had identified her. And Logan [Ludwig] said to me, "Don't you take any more of my staff members." [Laughter] I didn't take any more of his, but, yes, I would... And then

the reverse was true. If I was meeting with a serials or acquisitions librarian, I would say, “How are things here? I understand that so-and-so is going to be retiring over at Emory,” and it kind of worked out that way. That’s mentoring.

RF: Oh, yes, for sure. But I agree with Scott. I think we don’t always know what impact we have on people.

SP: One of the funny advantages of my current physical situation is—the last MLA we got to is a good example—we missed last year, so Atlanta [2018] the year before—I got into the exhibit hall and found a place to sit by a table. Lynn could go and get me a glass of wine, bring something back. Then I sat and just sort of held court. People would come by and say hello. People whose paths I had intercepted for thirty years, some of whom I knew very well, some of whom I had only interacted with briefly, and yet who clearly I had had an impact on.

RF: Because they wanted to say hello.

SP: And I think the other thing for me, because of the writing and presenting, is the influence that I’ve have had on people I have never met. That little editorial on the inept but satisfied user is still used in library schools. I know that my Doe Lecture is used in library schools.

In the fall of 2012, I was invited to speak at the New England Library Association meeting—not medical, mostly public librarians. But the invitation was because the staff member of a small-town public library, who was, I think, the incoming chair of that association, she had a staff member who got a copy of my lecture and brought it to her and said, “You really need to read this. This is really cool stuff.” She read it and she called me and asked if I would come and speak at their meeting. And I went and spent a couple days hanging out with these public librarians.

I think when we were at the last Southern Chapter meeting, and I don’t remember who it was now, but somebody came up and thanked me again for the Doe Lecture and said she had really taken that to heart and she really talks about librarians and not libraries now.

I did a presentation for NASIG [formerly North American Serials Interest Group]—one of the last really big presentations I did on institutional repositories and the directions in which they were going and the direction in which I thought they ought to go. And five or six months later, I was at the Charleston Conference, and this librarian came up me shyly and introduced himself and said, “My colleague and I are working on a paper that builds on the ideas that you presented at that. Will you be willing to take a look at it when we get it done?”

RF: Nice.

SP: I said, “Oh, absolutely. Send it to me.” And they sent it on. I made some comments and said, “This is great. Let me know when it’s published,” which they did. Every time

one of those things happens, then I know, oh, yeah, stuff is out there and it's making a difference. I'm not going to do any presentations anymore. I'm going to continue to write. But those things that are out there...

LF: Do you promise me that you're not going to do any more presentations?

SP: I'm pretty sure. But, yes, so there's a rippling effect out there. I talked about the congressional testimony. One of the people who was in the audience there was the chief counsel for the Association of American Publishers, their chief lobbyist, who spends all of his time on Capitol Hill arguing for policies that many librarians don't approve of, but that's okay.

RF: Mm-hmm, that's his job.

SP: We got done, and he was congratulating me, saying, "I thought you did a really good job. Very persuasive, very clear." I said, "I'm glad to hear that, because I do this writing and I do presenting, and it's really important to me to try to bring these different issues together. And I sometimes wonder if anybody's listening." And he looks at me and says, "You're the one who's there testifying in front of Congress. People are listening."

RF: You were invited and none of those people have been.

Of all the things that we've talked about—which is a lot, because you both have had very productive careers—what's most important to each of you and are there ways you would like to be remembered?

LF: What's most important to me is him. I think you'll remember me. I think I've made an impact [laughter]. No, seriously. I've enjoyed my career and I'm happy for all the people I've known and influenced and hopefully haven't hurt—and I know there have to be some of those, because life isn't perfect or fair. But I'm incredibly amazed at actually how you and I have worked this marriage out. We were never competitive. Well, because we were in the same industry but kind of in two different fields. But there has not been a hint of competitiveness except when we were in a hotel room with only one bathroom, and then—

SP: And we were both on the program.

LF: So, we had to compete for bathroom time. But then, when transverse myelitis hit, and it changed our lives unexpectedly and suddenly and right before Christmas, it was really, really difficult for both of us. But it is what it is and we got past it. So, again, he's been my most valuable asset.

SP: The thing that I'm proudest of professionally are the things that we just talked about—being able to influence people in a positive way, being able to use my time at Lister Hill to create an environment that enabled a bunch of people to succeed, to have

the opportunity to be involved with the Scholarly Publishing Roundtable. Those have all been great things.

When I worked out that I was retiring, I had a little retirement reception and I was talking with the dean of public health, who was a good friend and colleague. He said, “So you’re one of the few who has apparently figured out how to move on from your career.” There were a lot of people talking and conversing, so I didn’t really get a chance to have the kind of in-depth conversation that I would have liked to. But I thought about it afterwards, and I thought it was not complicated, because my career was never the center of my life.

I think it goes back to the work-life balance stuff. In my first marriage, my wife was one of those who wanted to save the world. And many of us had these very idealistic visions of the impact that we might be able to have. My divorce and the kind of personal learning that I went through after that was a very properly humbling experience.

There was a lesson that I got from my mom, who went on to get her master’s in education and became a reading specialist with the local high school, which meant that she worked with a lot of troubled kids. She was at it long enough that she ended up working with the troubled kids of a lot of those troubled kids. She worked with a lot of kids who didn’t make it and were not going to make it, and she knew that. And I said, “How do you do that?” And she said, “I can’t save anybody, but in every interaction that you have with somebody, something goes into the good side and something goes into the bad side, and I can just make sure that everything that I do goes into the good side.”

By the time Lynn kind of pulled me out of that uncertainty about what I was going to do that enabled me to find focus—Lynn and Marian were, I can make a difference here. And I knew what Lynn’s priorities were, and I would joke that in a lifeboat built for two, I know who’s going over the side, and that’s okay. I can work with that. Then Marian had Josie when I was fifty, and she did it as a single parent. For the first four years of Josie’s life, her dad was nowhere to be seen, and so I had the experience of being the father to this little kid. That is still Marian and Josie and Lynn, and now, in the lifeboat built for three, I know who’s going over the side.

When it came time to leave Lister Hill—and I retired sooner than I would have because I physically could not handle it anymore—but it wasn’t hard to walk away from. And I continued to be active. I do a regular column. I mentioned the stuff I’m still doing with MLA. I’ve been involved with other stuff. And I expect to continue to do all of those things. But back to talking about work-life balance: I never felt that I had my work and my professional life over here and the rest of my life over here and I had to somehow balance them and make choices between them. My personal identity was never wrapped up in my job.

RF: You’re fortunate, Scott, in that you have the smarts and you had the ability to juggle multiple interests simultaneously. We all know people in academic medicine who can’t let it go, who can’t retire, because that’s all there is.

LF: No, they can't. There are so many, so many. Or even in medical librarianship—not naming any names, but I could. They're just always there and it's going to be you and me. I remember being at Bob and Sharon Braude's apartment one time when we were up there. Bob was getting ready to retire and he wanted to move to his father's place. Sharon was pretty ambivalent about that. I said something about, "Will we see you at the next MLA, or what are you going to do with MLA?" And he said, "I'm going to totally walk away." I was shocked, because at that time—this has got to be twenty, fifteen years ago—at that time I was really involved in MLA. How could anyone abandon MLA like that? Bob Braude? After everything you've done, you're just going to walk away? I think of Bob's statement many times, because that is exactly what I think. I have no interest in consulting, I have no interest in writing, I have no interest at all except for whatever you're doing. I have more to fill my days now than I can possibly accomplish, and I'm loving that. So, you didn't walk away, but I did, and we're...

SP: Yes. You mentioned the consulting, and one of the decisions I made is I did not want to do consulting. I didn't want to get paid for anything I was going to do because I didn't want to have that obligation. I wanted to be able to do the things that I found interesting but to know that I could stop. I've continued to try to work on things that I think are interesting and will be fun.

The column that I do for *Against the Grain* is entirely because I wanted a regular deadline so that I would be forced to finish pieces. Over the years I had done a piece or two on occasion for *Against the Grain*, and Katina [Strauch] would every once in a while ask me to work on something. Sometimes I would, but usually I wouldn't. When I decided to retire, one of the things I wanted to do was to spend more time writing. A lot of the writing I do has nothing to do with libraries and scholarly publishing, but that's still an area that I'm really interested in. And so I thought, I wonder if I could persuade Katina to give me a regular column, because it's a bimonthly publication; it would give me six deadlines a year. They're 2,000-word pieces; that's about the length that I was doing for *JMLA* editorials. As I was getting ready for the Charleston Conference meeting in 2017, I didn't want to take it for granted. I didn't want to put them in an awkward position. I really tried to think about how I could very carefully pitch this idea in the appropriate way. I go to the meeting and the first day is their Vendor Showcase. I go to the exhibit hall and Katina is sitting right outside. She had retired a year or two earlier.

LF: But she still runs this big conference.

SP: Yes. I go over and give her a kiss. "How's retirement going for you?" At this point, I had just officially retired, although I had been not working for three months or so. And I said, "Oh, I'm starting to try to figure out what I want to do." She says, "Why don't you do a column for *Against the Grain*? Write about anything you want to write about." "Oh, well, yeah, let me think about that. I'll get back to you." So that has turned out to be great.

RF: It just dropped in your lap.

SP: Like I said, that gives me a deadline. I write the pieces as personal essays, so again, in the way that I approached editing the *JMLA* with the mind of a literary editor, I write these as personal essays, in that kind of a style, but about whatever some of the issues of the day may be. The themes that have occupied me are there. I talk about the relationships between librarians and publishers and what I think is going wrong and what I think is going right. And I will probably continue to do those for a while, but it's principally because it gives me a deadline.

LF: You love your writing.

SP: The other things that I'm working on—I've got all kinds of bits and pieces and things and it can take me a long time. I just finally put up a blog post on—again, it has nothing to do with librarianship, but it has to do more with music and transverse myelitis. It's a thousand words. I started working on it in the middle of November and I finally finished it two days ago. I've worked on a lot of other stuff. I wrote a column for *Against the Grain*, worked on some other pieces, but getting things finished, because of the way that I'm trying to write, that's one of the biggest challenges that I'm facing right now. It's, how do I take some of these things.

I'm pretty good at doing the 2,000-word personal essay type thing on a library or scholarly communication related topic. What I want to do now is to be able to do the 8,000- or 10,000-word personal essay. The 2,000-word piece is kind of one idea run through a couple of different ways of looking at it, so that at the end of it, somebody is seeing it in a new way. To go to 8,000 or 10,000 words, you have to bring in two or three other things and see how they connect and dig more deeply into them. Since I don't have a clear outlet for those, figuring out how to put the pressure on myself to actually take some of these pieces that I have—they're all on the computer, but in my mind they're all bits and scraps that are kind of scattered around the floor—and I'm trying to figure out how they connect and where the gaps are and how I can put them together. So that's kind of the big challenge.

The goal for me is three hours of writing every day. The reality is, I average about two.

RF: Compared to most people, that's still quite a bit.

SP: Yes. As long as you're writing every day—one of my favorite quotes is by Randall Jarrell, the poet and critic who was prominent in the '50s, early '60s. He has a line where he says, "A great poet is someone, who in a lifetime of standing out in the rain, manages to get hit by lightning five or six times." I read that early in my college career and struggling to think about what it meant to be a poet and to be a writer. And I thought, well, you don't have any control over the lightning, but you can sure as hell go out and stand in the rain every day.

LF: Okay, so if I'm gazing out the kitchen window and I see you standing in the rain, do I need to check the weather report for the most recent lightning strikes in the area?

RF: Might be. Well, I think we may be at a wrap. I can't tell you what a privilege it is to do these, because we don't have these kinds of protracted conversations with our friends and colleagues about what is most meaningful to you in your career and profession and your thought process about the profession. Both editing and doing these interviews has been such a great gift to me.

LF: I can imagine that it would be. You're very expert at it, and the fact that we got the outline of the questions well ahead of time and could take the time to make a hundred pages of notes—I'm not kidding, although I sent you my printout twice so it's not quite that bad. But doing this was like having my life flash in front of my eyes, but very slowly [laughter].

RF: Well, officially, this concludes the interview with Lynn Fortney and Scott Plutchak on January 9, 2020. One of the things that I really do miss in retirement is the interaction with friends and colleagues, and it's part of the reason I still sometimes get back to MLA meetings, just to have dinner and drinks and things with people, and have some of these conversations...

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Lynn Fortney, Vice President of Medical E-journals and E-packages at EBSCO Information Services to Retire

~ Medical Librarian Will Retire from EBSCO on Her 25th Anniversary Date ~

IPSWICH, Mass. — May 16, 2014 — Lynn Fortney, Vice President of Medical E-journals and E-Packages at [EBSCO Information Services](#) (EBSCO) will retire on July 5, 2014. That date is her 25th anniversary at EBSCO.

Fortney says, “I have had an amazing career, but my successes have been because of the impressive colleagues I have been privileged to work with, librarians and other information industry leaders alike. EBSCO provided me an incredible opportunity to apply my understanding of the unique issues faced by health sciences librarians to what has become the largest suite of products and services in the information industry. Medical libraries today bear little resemblance to those from the early days of my career and neither does EBSCO. 1973 - 2014; my career has been an awesome, Walt Disney World's Expedition Everest roller-coaster ride.”

Career Highlights

Fortney started her library “career” in the eighth grade, working as an aide in her school’s library, but it was not until she attended Grinnell College that she learned what a librarian could accomplish in terms of finding information. After graduating in 1972 from Grinnell with a B.A. in American Studies (with a minor in studio art), Fortney attended Emory University’s Division of Librarianship where she earned a Master’s degree in 1973 while working at the Central Library of the Atlanta-Fulton Public Library System.

Her first professional library position was Medical Reference Librarian at the University of Alabama College of Community Health Sciences (CCHS) Library in Tuscaloosa. In 1975, she was appointed Chief Medical Librarian of the CCHS, and was instrumental in developing the plans for and eventually moving the library to Druid City Hospital (now DCH Regional Medical Center). In 1982, Fortney accepted the position of Associate Director of Public Services at the Lister Hill Library of the Health Sciences/University of Alabama at Birmingham, where she was deeply involved in the selection, implementation and training for the library’s first integrated library system (ILS), the Georgetown LIS.

25 Years at EBSCO

In 1989, Fortney was recruited by EBSCO to become the company’s first Medical Library Marketing Manager, and subsequently became Vice President/Director, Biomedical Division. In this role, she provided a biomedical library focus for the company by monitoring trends affecting academic medical center and hospital libraries, recommending new services specifically

designed for health sciences librarians, and participating in product development and business planning.

She started her tenure at EBSCO at the dawn of MEDLINE on CD-ROM and the early days of email as we know it. In her 25 years at EBSCO, Fortney experienced the impact of the rise of the Internet, the World Wide Web, and electronic journals. A major focus of her career was working on tools for collection development/assessment and journal price studies, specifically the Index Medicus Price Study (IMPS). In 1999, the Medical Library Association Collection Development Section awarded Fortney the first Daniel T Richards Prize For Writing Related to Collecting in the Health Sciences, for the "Index Medicus Price Study, 1998-1999", which she co-authored with Victor Basile.

EBSCO Information Services President Tim Collins says Fortney has helped EBSCO shape its ever-expanding medical resources and provided EBSCO with a very valuable medical librarian perspective. "We have been fortunate to work with such a strong advocate for medical libraries for so many years. Lynn has been a key member of our team for a long time and we believe medical libraries have benefited significantly from the guidance she provided."

Conferences, T. Scott Plutchak and The Bearded Pigs

Fortney has presented at events and conferences across America and around the world, including delivering the keynote address at the Australian Library and Information Association "Specials" Conference, Melbourne, Australia, 2001. She met her future husband, T. Scott Plutchak (at the time, Director of the St Louis University Health Sciences Library), in 1992, when she invited him to speak at a seminar for academic medical library directors she was organizing in Birmingham. Their wedding was the "featured entertainment" of the Midcontinental Chapter's Welcome Reception in Kansas City in 1995. Plutchak (currently Director, Lister Hill Library of the Health Sciences/University of Alabama at Birmingham), Fortney and several of their musically talented friends in the medical library field formed a band, "The Bearded Pigs," that played for many years at the MLA Annual Meeting (with incidental proceeds to the MLA's Grants and Scholarship Fund).

Professional Associations

Fortney has been active in professional associations throughout her career, most especially the Medical Library Association (MLA); teaching MLA continuing education courses and speaking at symposia, serving on various MLA committees and task forces, and in leadership roles of several sections. She was a founding member and first president (1980-81) of the Alabama Health Libraries Association, Chair of the Southern Chapter/Medical Library Association in 2001 – 2002, served on the national MLA Nominating Committee three times (1997, 2004 and 2010), and was elected to the MLA Board of Directors for a three year term, 2000-2003. She says her greatest honor came in 2011 when she was named a Fellow of the Medical Library Association, which she describes as, "a rare tribute for someone who did not work in a library." Fortney has always refused to be referred to as "a vendor who used to be a librarian". For 25 years, she happened to work for a vendor. But she has always been a librarian first.

About EBSCO Information Services

EBSCO Information Services (EBSCO) is the world's premier database aggregator, offering a suite of more than 375 full-text and secondary research databases. Through a library of tens of thousands of full-text journals, magazines, books, monographs, reports and various other publication types from renowned publishers, EBSCO serves the content needs of all medical professionals (doctors, nurses, medical librarians, social workers, hospital administrators, etc.). The company's product lines include proprietary databases such as *CINAHL*®, *DynaMed*™, *Nursing Reference Center*™, *Patient Education Reference Center*™, *Rehabilitation Reference Center*™, *Rehabilitation & Sports Medicine Source*™ and *SocINDEX*™ as well as dozens of leading licensed databases such as *MEDLINE*®, *PsycARTICLES*® and *PsycINFO*®. Databases are powered by *EBSCOhost*®, the most-used for-fee electronic resource in libraries around the world. For more information, visit the EBSCO website at: www.ebsco.com, or contact: information@ebsco.com.

###

Thomas Scott Plutchak
(revised January 2018)

Professional History

Director of Digital Data Curation Strategies, September 2014 – October 2017
University of Alabama at Birmingham

Director and Associate Professor, Lister Hill Library of the Health Sciences, October 1995 – September 2014
University of Alabama at Birmingham

Associate Professor (adjunct), Health Informatics Program, School of Health Professions, January 2000 – September 2014
University of Alabama at Birmingham

Associate Director, Academic Programs Information Technology, September 1997 – 1999
University of Alabama at Birmingham

Director, March 1990 -- October 1995
Health Sciences Center Library, St. Louis University, St. Louis, MO

Acting Director, July 1989 -- February 1990
Medical Center Library, St. Louis University

Associate Director, March 1987 -- February 1990
Medical Center Library, St. Louis University

Technical Information Specialist, September 1984 -- February 1987
National Library of Medicine, Bethesda, MD

Library Associate, September 1983 -- September 1984
National Library of Medicine

Education

Master of Arts -- Library Science
University of Wisconsin-Oshkosh, August 1983

Bachelor of Arts -- Philosophy
University of Wisconsin-Milwaukee, May 1979

Professional Affiliations

Association of Academic Health Science Libraries. Member, 1990-2014.

Education Task Force, 1991-92.

Library Information Management Technology Committee, 1992-4.

"Charting The Future" Taskforce, 2001-3

SPARC Co-operation Taskforce, 2001-3

Scholarly Communication Taskforce, 2003-6

"Charting the Future" Committee; chair, 2003-6

NLM/AAHSL Leadership Fellows program; mentor, 2003-4, 2009.

AAHSL/Publisher Liaison TaskForce, 2007-10

Chicago Collaborative, Founding Representative, 2008-12

Medical Library Association. Member, 1983-.

Ethics Task Force, 1992-4.

Medical Informatics Section. Member, 1992-05, Liaison to Governmental Relations Committee, 1993-2001. Planning Coordinator for section participation in ICML 2000, 1998-2000.

Medical School Libraries Section. Member, 1992-00. Chair-Elect, 1998-9. Chair, 1999-00.

Leadership and Management Section. Member, 2000-05.

1990 National Program Committee, 1988-90.

1999 National Program Committee, 1997-99.

Academy of Health Information Professionals, Senior Member, 1990-5, Distinguished Member 1995-.

Competencies Survey Advisory Committee, 1997-98.

Editor, Bulletin of the Medical Library Association, 1999-2001; *Editor, Journal of the Medical Library Association*, 2002-5.

Nominating Committee, 2001

Informationist Task Force, 2001-2

Board of Directors, 2006-9

Ethics Task Force, 2008-9

Editorial Board, JMLA, 2012-2015, 2017-2020

Fellow of the Medical Library Association, 2013-

Nominating Committee, 2014

Senior Editor, JMLA, 2016-2017

Co-chair, JMLA EIC search committee, 2016-2017

Midcontinental Chapter, MLA. Member, 1987-.

Editor, MCMLA Express, 1988-92.

Annual Meeting Planning Committee 1992, Program Co-Chair, 1990-92.

Chapter Candidate to MLA Nominating Committee, 1994-95.

Electronic Communications Ad Hoc Committee, 1994.

Honors and Awards Committee, 1995-6.

Southern Chapter, MLA. Member, 1996-.

Chapter Nominee to MLA Nominating Committee, 2000.
Conference Chair, 2008 Annual Meeting, 2006-8.
Chapter Nominee to Nominating Committee, 2013.

South Central Chapter, MLA. Member, 2000-8.

CONBLS (Consortium of Southern Biomedical Libraries. 1995-2014.
Bi-annual retreat, Chair. 2004.
Nominating Committee. 2011.

Regional Advisory Committee, National Network of Libraries of
Medicine/Midcontinental Region. Ex Officio Member, 1990-95. Chairman, Resource
Library Directors Council, 1991-95.

American Medical Informatics Association. Member, 1990-2001.

St. Louis Medical Librarians. Member, 1987-95.
Program and Education Committee, chair, 1988-89.
Grant Planning Committee, 1989-90.
Planning Committee, 1992 Annual Meeting, Program Committee chair.
Strategic Planning Committee, 1994-95.

Network of Alabama Academic Libraries.
Electronic Access Committee, Chair 1996-97.

Alabama Health Libraries Association. Member, 1996-2015.

Alabama Library Association. Member, 1996-2000.
Chair, President's Task Force on Technology, 1996-8.
Chair, Legislative Development Committee, 1998.

Alabama Virtual Library Steering Committee. Member, 1998-1999.

American Library Association. Member, 1996-2014.

Association of American Medical Colleges
Group on Information Resources, voting member, 1999-2015. Leadership
Development Committee, 2000-02. Steering Committee member, 2000-02.

Society for Scholarly Publishing, Member, 2008-.

Advisory Panels & Working Groups

New England Journal of Medicine Library Advisory Committee, 2002-4.

National Library of Medicine Working Group on Bioethics Literature, 2003.

National Library of Medicine Long-Range Planning Panel, 2005-6.

Editorial Advisor, Peer Reviewer, *Evidence Based Library and Information Practice*, 2005-.

NISO/APLSP Journal Article Versions Working Group, 2005-8. [*Journal Article Versions (JAV): Recommendations of the NISO/ALPSP JAV Technical Working Group (NISO-RP-8-2008)*]

PNAS (Proceedings of the National Academy of Sciences) Library Advisory Group, 2008-2012

STM Library Relations Committee (International Association of STM Publishers), 2009-

House Science and Technology Committee/OSTP Roundtable on Public Access to Federal Research and Data, 2009. [*Report and Recommendations from the Scholarly Publishing Roundtable, January 2010*]

Global Health Library International Consultation. World Health Organization. Geneva, Switzerland. 26-27 November 2009.

Silverchair Library Advisors, 2011-13.

JoVE (Journal of Visualized Experiments), Library Advisory Board, 2012-2015

BMJ Editorial Advisory Board, 2013-2018

Highwire Library Advisory Council, 2015-

Journal of eScience Librarianship Editorial Board, 2016-

Metadata 2020 Steering Committee, 2016-

Open Scholarship Initiative
Conference organizing committee, 2015-
Summit group, 2017-

Honors & Awards

Fellow of the Medical Library Association (FMLA), 2013.

Janet Doe Lecturer, 2011. Medical Library Association.

Outstanding Alumni Award, 2009. University of Wisconsin-Fox Valley.

MLA Research Award, 2nd place. Poster: "Expanding our Reach: The Impact of Open Access on the Journal of the Medical Library Association." Presented at the 2006 Medical Library Association Annual Meeting, May 19-24, Phoenix, AZ

Estelle Brodman Academic Librarian of the Year, 2001. Medical Library Association.

Academic Librarian of the Year, 1999. Southern Chapter of the Medical Library Association.

Grants & Contracts

National Library of Medicine, Women's Health Resources Dissemination Outreach Project. 2013. \$44,351. 2014. \$49,210. Contract No. HHSN316201200028W.

Special Emphasis Panel, Translational Informatics Grants, National Library of Medicine. Panel member, 2005.

Special Emphasis Panel, Internet Connections for Health Institutions, National Library of Medicine. Chair, 1996, 1997, 1998, 1999, 2000, 2001. Panel member, 2004.

National Science Foundation, "Multicampus Network Connections to NSFNET." NCR-9318116, October 1993 to March 1996.

National Library of Medicine, Grateful Med Outreach Contract 467-MZ-101133, September 1991 to June 1993.

Publications, Author

Plutchak TS. "The Insufficiency of Facts." 2017 June. *Against the Grain*, 29(3).

Plutchak TS. "Book(s) Review: The Medical Library Association Guide to Data Management for Librarians and Data Management: A Practical Guide for Librarians." *Journal of eScience Librarianship*, e1110. 2017 Feb. 15. doi:[10.7191/jeslib.2017.1110](https://doi.org/10.7191/jeslib.2017.1110)

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Plutchak, T. Scott. "The librarian: fantastic adventures in the digital world." *Serials* Jul 2007;20(2):87-91.

Plutchak, T. Scott. "The landscape shifts: new opportunities for collaboration arise as the primacy of the traditional journal article fades." *Serials* Nov 2006;19(3):184-7.

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Plutchak, T. Scott. "Inept and Satisfied, Redux [editorial]" *J Med Lib Assoc* Jan 2005;93(1):1-3.

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Plutchak, T. Scott. "Friends and colleagues [editorial]" *J Med Lib Assoc* Apr 2003;91(2):141-3.

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Plutchak, T. Scott. "The Art and science of making choices [editorial]" *J Med Lib Assoc* Jan 2003;91(1): 1-3.

Plutchak, Scott. "Research in librarianship: 'Say what you mean.'" *Bibliotheca Medica Canadiana* Fall 2002;24(1):38-9.

Plutchak, T. Scott. "The informationist – two years later. [editorial]" *J Med Lib Assoc* Oct 2002;90(4):367-9.

Plutchak, T. Scott. "Determining value. [editorial]" *J Med Lib Assoc* Jul 2002;90(3):273-5.

Plutchak, T. Scott. "Sands shifting beneath our feet. [editorial]" *J Med Lib Assoc* Apr 2002;90(2):161-3.

Plutchak, Scott. "Research in librarianship: tools for library research." *Bibliotheca Medica Canadiana* Spring 2002;23(2): 109-10.

Plutchak, T. Scott. "Learning from each other. [editorial]" *J Med Lib Assoc* Jan 2002;90(1):1-3.

Plutchak, T. Scott. "Preservation. [editorial]" *Bull Med Lib Assoc* Oct 2001;89(4):409-10.

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Plutchak, T. Scott. "MLA's Strategic Plan: Reform or Revolution?" *MCMLA Express* 1988 Summer;10(3):6-7.

Plutchak, T. Scott. "Credentialling: ALA Degree No Guarantee of Quality." *Technical Trends* 1988 Summer;2(3):22-3.

Plutchak, T. Scott. "Shareware Exchange Announced." *MCMLA Express* 1988 Summer;10(3):19-21.

Plutchak, T. Scott. "Retraction of Publication and Errata." *NLM Technical Bulletin* 1986 Dec;(212):19-21.

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Plutchak, T. Scott. "MEDLARS...or MEDLINE...or ELHILL...or What? A Primer of NLM Terminology." *NLM Technical Bulletin* 1986 Sep;(209)Suppl:16-8.

Plutchak, T. Scott. "Portraits." *NLM Technical Bulletin* 1986 Apr;(204):15-6.

Rusin, Harriet and T. Scott Plutchak. "The RENAME Command." *NLM Technical Bulletin* 1986 Mar;(203):12-3.

Plutchak, T. Scott. "Over-Alls." *NLM Technical Bulletin* 1986 Feb;(202):14-7.

Stander, Ruth and T. Scott Plutchak. "Interleukin 2." *NLM Technical Bulletin* 1986 Jan;(201):7-9.

Rosov, Jane L and T. Scott Plutchak. "NEIGHBORing For Spelling Variations in MEDLINE." *NLM Technical Bulletin* 1985 Sep;(197):21-3.

Rusin, Harriet and T. Scott Plutchak. "Stored Address." *NLM Technical Bulletin* 1985 Aug;(196):15-8.

Plutchak, T. Scott. "Using the COMMENT Command to Contact the MEDLARS Management Section." *NLM Technical Bulletin* 1985 May;(193):17.

Plutchak, T. Scott and Gale Dutcher. *DOCLINE: NLM's Interim Interlibrary Loan System -- User's Manual*. National Library of Medicine, July 1984.

Publications, Editorial

Guest Editor, Special Supplement on 100 Years of the JMLA. *Journal of the Medical Library Association*, Oct 2012;100(3suppl).

Editor, *Bulletin of the Medical Library Association*, 2000-1, *Journal of the Medical Library Association*, 2002-6.

Editor, *MCMLA Express* (Midcontinental Chapter -- Medical Library Association), September 1988-92.

Editor, *NLM Technical Bulletin* (National Library of Medicine), July 1986-February 1987.

Assistant Editor, *NLM Technical Bulletin* (National Library of Medicine), October 1984-July 1986.

Presentations

“Dialectic: The Aims of Institutional Repositories.” NASIG annual conference. Albuquerque, NM. June 10, 2016.

“Big Data: Unlocking the Promise of Research Data.” Danuta A. Nitecki and T. Scott Plutchak. Society for College and University Planning, Mid-Atlantic Symposium: Big Data: Academy Research, Facilities, and Infrastructure Implications and Opportunities. Baltimore, MD. May 13, 2016.

“Big Data: Opportunities for Librarians.” Keynote presentation. Annual meeting of the Midwest Chapter of the Medical Library Association. Louisville, KY. October 5, 2015.

“Data Wranglers @ The Edge of Chaos.” NFAIS Webinar: Overcoming Challenges to Sharing Data. September 14, 2015.

“Data Wranglers in LibraryLand: Finding opportunities in the changing policy landscape.” Keynote presentation and panel participant. Society for Scholarly Publishing annual meeting. Arlington, VA. May 27, 2015.

“Data Wranglers: Unlocking the promise of open data.” Edge of Chaos Scholar’s Lecture. Birmingham, AL. March 26, 2015.

“Managing subscriptions after Swets.” Panelist. 34th annual Charleston Conference on Issues in Book & Serial Acquisition. Charleston, SC. November 7, 2014.

“Let’s Talk: Bringing Many Threads Together to Weave the Scholarly Information Ecosystem.” Panel organizer and facilitator. 34th annual Charleston Conference on Issues in Book & Serial Acquisition. Charleston, SC. November 7, 2014.

“The Librarian as Patient.” Invited speaker. Patient Engagement Symposium. Annual meeting of the Medical Library Association. Chicago, IL. May 17, 2014.

“Innovations in Scholarly Communication: The Library Landscape.” AAAS Annual meeting. Chicago, IL. February 14, 2014.

“Publishers and librarians: we share the same values – why are we fighting?” Closing plenary. UKSG Annual conference and exhibition. Bournemouth, UK. April 10, 2013.

“Sustainability and Access.” Invited speaker. Pre-conference, annual meeting of the Professional and Scholarly Publishing Division of the American Association of Publishers. Washington, DC. February 6, 2013.

“Librarians’ New Dawn.” Keynote address. New England Library Association annual meeting. Sturbridge, MA. October 14, 2012.

“Heat In The Kitchen.” Invited speaker. STM: International Association of Scientific, Technical & Medical Publishers annual meeting. Frankfurt-am-Main, Germany. October 9, 2012.

“Librarians for the Future.” Invited panelist. Midcontinental Chapter of the Medical Library Association annual meeting. Kansas City, MO. October 4, 2012.

“The Changing Library Marketplace.” Invited panelist. Council of Engineering and Science Society Executives annual meeting. Louisville, KY. July 25, 2012.

“Ending the Big Deal.” Invited presentation. American Library Association annual conference. Anaheim, CA. June 24, 2012.

“Open Access and Libraries.” Invited presentation. 29th International Publishers Congress. Cape Town, South Africa. June 12, 2012.

“The Transformation of Libraries and their Users: Q & A with Librarians.” Invited panelist. STM Spring Conference 2012: The New Normal: Users and Publishers Evolving Publishing. Washington, DC. May 2, 2012.

“The Value of the Scientific Literature.” Cold Spring Harbor invitational conference on the future of scientific research libraries. Banbury Center, Cold Spring Harbor Laboratory. April 2, 2012.

“Lost Opportunities: A Decade of the OA Wars.” The 22nd Miriam Libbey Lecture. Georgia Health Sciences Library Association annual meeting. Atlanta, GA. March 9, 2012.

“Executive Roundtable.” Panel discussion organizer & moderator. 31st annual Charleston Conference on Issues in Book & Serial Acquisition. Charleston, SC. November 4, 2011.

“Librarians & Publishers: Time for a Conversation.” Panel discussion organizer & moderator. Midcontinental Chapter of the Medical Library Association annual meeting. St. Louis, MO, September 22, 2011.

“Breaking the Boundaries of Time and Space: The Dawning of the Great Age of Librarianship.” The 2011 Janet Doe Lecture. Medical Library Association annual meeting, Minneapolis, MN, May 16, 2011.

“Impact of Licensing Cuts on Research and Education: Results of a Focus Group Study” by Pat Higginbottom, Tracy Powell, T. Scott Plutchak. Presentation by Plutchak at the 30th annual Charleston Conference on Issues in Book & Serial Acquisition. Charleston, South Carolina. November 5, 2010.

“Plagiarism in the Academy: Now What Do We Do?” Invited presentation. Annual CrossRef membership meeting. Cambridge, MA. November 10, 2009.

“Update on the Chicago Collaborative: Bringing the Stakeholders Together.” Invited presentation. Annual meeting of the International Association of Scientific, Technical and Medical Publishers. Frankfurt-am-Main, Germany. August 13, 2009.

“Describing Versions of Scholarly Articles.” 10th International Congress on Medical Librarianship. Brisbane, QLD, Australia. September 2, 2009.

“The NIH Public Access Policy: Implementation and Impact.” Invited presentation. ER&L Conference 2009. Los Angeles, CA. February 10, 2009.

“Journal Article Versions (JAV): Recommendations of the NISO/ALPSP JAV Technical Working Group.” Society for Scholarly Publishing E-journal seminar. Washington, DC. November 19, 2008.

“Health Information Transforming Communities.” Invited presentation, annual meeting of the Chartered Institute of Library and Information Professionals – Scotland. Peebles, Scotland, UK. June 4, 2008.

“Engaging Our Communities Where They Live.” Invited keynote. Annual meeting of the Association of Subscription Agents. London, England, UK. February 25, 2008.

“Institutional Repositories: Where Do They Fit?” Invited panelist, Wiley/Blackwell Executive Seminar. Washington, DC. December 7, 2008.

“The Age of Librarians.” 27th annual Charleston Conference on Issues in Book & Serial Acquisition. Charleston, South Carolina. November 9, 2007

“The Librarian: Finding Success in the Digital World” and “Librarians and the Publishing Cycle: New Roles, New Relationships, New Opportunities.” Invited presenter at: Library Connect: Adding Value to Content seminars in Tokyo, Japan (July 2, 2007) and Kyoto, Japan (July 3, 2007); workshop presenter at: Digital Library Management for Tomorrow’s Leaders in Bouen-Gun, South Korea (July 5-6, 2007).

“Evidence-Based Library and Information Practice – Clear, Simple, and Wrong?” Invited presentation to the 4th International Evidence-Based Library and Information Practice Conference. Durham, NC. May 7, 2007.

“Libraries Are Good – Librarians Are Essential.” Invited keynote to the annual meeting of the Wisconsin Health Libraries Association. Milwaukee, WI. April 23, 2007.

“The Librarian: Fantastic Adventures in the Digital World.” Invited keynote to the 30th annual conference and exhibition of the UK Serials Group. University of Warwick, United Kingdom. April 17, 2007.

“The Search for Unintended Consequences.” Invited presentation to the 26th annual Charleston Conference on Issues in Book & Serial Acquisition. Charleston, South Carolina. November 10, 2006.

“The Future Role of Librarians...” Invited presentation to the annual meeting of the International Association of Scientific, Technical & Medical Publishers. Frankfurt, Germany. October 3, 2006.

“After the E-Journal: Now It *Really* Gets Interesting.” Invited presentation to the NASIG Electronic Journals Continuing Education Workshop. Mississippi State University. July 14, 2006.

“What’s A Serial When You’re Running on Internet Time?” Invited presentation to the 21st annual conference of NASIG (North American Serials Interest Group). Denver, CO. May 7, 2006.

Panelist for “Librarian Focus Group” sponsored by the Society for Scholarly Publishing. Washington, DC. February 9, 2006.

“The End of Libraries.” Invited presentation to the 25th annual Charleston Conference on Issues in Book and Serial Acquisition. Charleston, SC. November 4, 2005.

“The impact of open access for the Medical Library Association.” ICML9 (World Congress on Information and Health Libraries), Salvador, Brazil, September 23, 2005.

“Our revolution is just getting started.” Invited presentation to the Leadership & Management Division, Special Libraries Association. Annual meeting. Toronto, Ontario, Canada, June 6, 2005.

“Issues for electronic publishing.” Invited presentation to the *International Committee of Medical Journal Editors (ICMJE)*. Washington, DC, May 3, 2005

“Point-counterpoint on Open Access” (with Rick Anderson). Serials Services in the Eye of the Information Storm: The 14th North Carolina Serials Conference. Chapel Hill, North Carolina, April 14, 2005.

“What *really* happens: the open access experience at the Medical Library Association.” Allen Press Emerging Trends Seminar. Washington, DC, April 13, 2005.

“Don’t blink: the changing world of scholarly publishing.” The Dean’s library week lecture, University of South Alabama. Mobile, Alabama, April 11, 2005.

“Revolutions in scholarly publishing: the impact on research universities.” Friends of the Lister Hill Library lecture. Birmingham, Alabama, December 2, 2004.

“Dealer’s shuffle: Keeping up with trends in scholarly publishing.” Invited presentation. Southern Chapter of the Medical Library Association (SCMLA). Annual meeting. Biloxi, Mississippi, October 24, 2004.

“Our revolution is just getting started.” Keynote address. North Atlantic Health Sciences Libraries, Inc. (NAHSL). Annual meeting. Sebasco Harbor, Maine, October 4, 2004.

“From clinical librarian to informationist: developing specialized expertise.” The Bishop & LeFanu Memorial Lecture. Health Libraries Group (UK). Biannual meeting. Belfast, Northern Ireland, September 8, 2004.

“Research ethics.” Guest lecture for several classes in the UAB Health Sciences schools, Fall 2004.

“Seize the E-journal: models for archiving.” Panelist & discussion facilitator. Medical Library Association annual meeting. Washington, DC, May 26, 2004.

“Economics of open access: gauging the impact on academic library budgets.” Invited presentation to the annual meeting of the Association of Subscription Agents. London, England, February 23, 2004.

“When Articles Vanish.” Presentation at the 23rd Annual Charleston Conference: Issues in Book and Serial Acquisition, Charleston, SC, November 7, 2003.

“Copyright, Fair Use and Plagiarism: Who owns what?” Guest lecture to School of Nursing, UAB. October 2, 2003.

“Copyright and Plagiarism.” Guest lecture to Maternal and Child Health class, UAB. Birmingham, AL, September 4, 2003.

“Academic Libraries and Copyright in the Digital Environment.” Guest in-service lecture at Samford University Library. Birmingham, AL, August 12, 2003.

“Intellectual property and scholarly publishing.” Guest lecture to Introduction to Libraries and Information Studies class, University of Alabama School of Library and Information Studies. Birmingham, AL, March 5, 2003.

“Protecting the Scientific Trail when the E-Version is the Publication of Record.” Presentation at the 22nd Annual Charleston Conference: Issues in Book and Serial Acquisition, Charleston, SC, October 31, 2002.

“Academic, Special and Health Sciences Libraries.” Guest lecture to Introduction to Libraries and Information Studies class, University of Alabama School of Library and Information Studies, Tuscaloosa, AL, June 21, 2002.

“Virtual Medicine: Growing Consumerism on the Web.” Presentation to Leadership Shelby County, Hoover, AL, December 12, 2001.

“Strategies for managing electronic resources.” Panel moderator. CONBLS bi-annual planning retreat. Nashville, TN, April 6, 2002.

Moderator and small group facilitator. Invitational conference on “The Informationist” sponsored by the Medical Library Association. National Library of Medicine, Bethesda, MD, April 4-5, 2002.

“Going Digital: The Case of the BMLA.” 9th Special, Health and Law Libraries Conference. Melbourne, Australia, August 28, 2001.

“Robber Barons of the Information Age.” Royal North Shore Hospital, Sydney, Australia. August 22, 2001.

“Bulletin of the Medical Library Association.” Invited speaker for the program “A Publishing Odyssey : What Medical Librarian Authors, Readers and Purchasers Need to Know.” Medical Library Association annual meeting, Orlando, FL. May 2001.

“Making the Magic: Essentials of Leadership.” Panel Moderator. Medical Library Association annual meeting, Orlando, FL. May 2001.

“Whose Research Is It? Robber Barons of the Information Age.” Lister Hill Library, Friends Lunch & Lecture Series. Birmingham, AL. April 9, 2001.

“Virtual Medicine – Medicine and the Internet.” Presentation to Leadership Shelby County, Hoover, AL, December, 2000.

“Intellectual Property and the Internet: Can Copyright Survive?” Invited Presentation. University of Alabama, School of Library and Information Studies. Annual alumni day program. October 13, 2000.

“Copyright: Who Owns that Article (and other fun facts).” Presentation to faculty of the Department of Occupational Therapy, School of Health Related Professions, UAB. October 2000.

“Publishing, Patents and Intellectual Property.” Presentation to UAB Clinical Research Class. May 2000.

“The Facts of Fair Use.” Invited Presentation. MLA Governmental Relations Committee. Medical Library Association annual meeting, Vancouver, BC May 2000.

“Intellectual Property: Who Owns The Words, Who Owns The Facts.” Presentation to UAB Health Services Administration students. April 20, 2000.

“Are You A Thief? Are You A Victim?” UAB Information Technology Days. April 18, 2000.

“Virtual Medicine – Medicine and the Internet.” Presentation to Leadership Shelby County, Alabaster, AL, December, 1999.

“Access For All: Statewide Licensing and the Development of the Virtual Library.” Presentation to the Southern Chapter / Medical Library Association annual meeting, Greenville, SC, October 1999.

“IAIMS: Planning for the Integrated Advanced Information Management System.” Invited presentation to the joint meeting of The Society of Research Administrators-Southern Section & The National Sponsored Programs Administrators Alliance, Biloxi, MS, April 1998

“Library Facilities: Construction, Interiors, Maintenance and Renovation.” Invited panelist. Program sponsored by the Education Committee of the Alabama Library Association, Montgomery, AL, March 1998.

“Library Advocacy Now!” Workshop leader. Birmingham, July 1998; Huntsville, August 1998; Mobile, September 1998; Montgomery, October 1998.

“Ownership to Access: Show Me The Money.” Presentation to the Southern Chapter / Medical Library Association annual meeting, Savannah, GA, October 1997.

“Gearing Up For Information Technology in the 21st Century: Meeting the Needs of Health Sciences Students Through Non-Traditional Library Services.” Invited panelist. Annual meeting of the Southern Chapter / Medical Library Association, Savannah, GA, October 1997.

“Engineering the Future.” Invited presentation to the annual meeting of the Georgia Health Sciences Library Association, Augusta, GA, March 1997.

“Reengineering and the Future of the Health Sciences Library.” Keynote address to the annual meeting of the Alabama Health Libraries Association, Birmingham, AL, September 1996.

“Electronic Publishing and the Virtual Library.” Presentation to the St. Louis Medical Librarians, St. Louis, MO, September 1995.

“Electronic Publishing and the Virtual Library.” Paper presented at the 4th International Conference on Image Management and Communication, Oahu, HI, August 1995.

"Are We Being Too Mickey Mouse About Change?" Paper presented at the annual meeting of the Southern Chapter of the Medical Library Association, Orlando, FL, October 1994.

"Finding -- and Publishing -- Information Resources on the INTERNET: Medical and Legal Applications." Joint presentation with James Milles. Information Technology Day. St. Louis University. April 14, 1994.

"Global Networks." Computer Multimedia Applications for Medical Practice. Sponsored by Division of Plastic Surgery and Continuing Medical Education, St. Louis University School of Medicine. May 14-16, 1993, St. Louis MO.

Branch, Katherine and Plutchak, T. Scott. "The Far Side of Reference Services: Revolution or Malfunction?" Paper presented at the 92nd Annual Meeting of the Medical Library Association, Washington, D.C., May 1992.

"Communication Skills." Roundtable discussion leader at the Joint Meeting of the St. Louis Medical Librarians and the Health Sciences Library Group of Greater Kansas City, May 1991, Columbia MO.

"Marketing Services to Senior Management." Roundtable discussion leader at the annual meeting of the Midcontinental Chapter of the Medical Library Association, September 1990, Seattle WA.

"Local Area Network at St. Louis University Medical Center Library." Presentation to the St. Louis Library Computer Users Group, September 1990, St. Louis MO.

"Libraries and Society -- Ethics." Moderator for program track at the annual meeting of the Medical Library Association, May 1990, Detroit MI.

"The Inept But Satisfied Searcher." Presentation to the annual meeting of the Mid-Atlantic Chapter of the Medical Library Association, November 1989, Rockville MD.

"Inside MEDLINE." Presentation to meeting of the St. Louis Medical Librarians, June 1989, St. Louis, MO.

"Talking back to the patron." Presentation to the annual meeting of Midcontinental Chapter of the Medical Library Association, October 1988, Breckenridge CO.

Participant in panel discussion on Clinical Applications. "MEDLINE on CD-ROM: National Library of Medicine Evaluation Forum." September 1988, National Library of Medicine, Bethesda, MD.

Teaching

"The Internet, Intellectual Property, and Their Impact on the Future of Medicine." UAB School of Medicine, Special Topics elective. December 15-19, 2008.

"Strengthening the Library's Position." AAHSL New Directors Seminar. Washington, DC. April 4-6, 2006.

"Getting Yourself Published: The basic of scholarly publishing in the library and information science literature." CE Course for the annual meeting of the Canadian Health Libraries Association. May 14, 2004.

"Writing for Publication." CE Course for the annual meeting of the Alabama Health Libraries Association. September 11, 2003.

"Fundamentals of Electronic Information Retrieval." UAB School of Medicine Scholar's Week Seminar. (w/ Martha Verchot and Pat Higginbottom). Summer, 2001. Summer, 2002. Summer, 2003. Spring, 2004. Summer, 2004. Spring, 2005. Summer, 2005.

"Whose Words Are They Anyway?: Electronic Publishing, Intellectual Property and the Internet" UAB Honors Seminar, 3 credits. Jan-Mar, 2000.

"Getting the Word Out: Publishing in the Age of the Internet" UAB Honors Seminar, 3 credits. Jan-Mar, 1999.