

MEDICAL LIBRARY ASSOCIATION

ORAL HISTORY COMMITTEE

INTERVIEW

WITH

**RAY NAEGELE**

Interview conducted by Mark E. Funk, AHIP, FMLA

May 7, 2019

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## Table of Contents

Consent Form	iii
Photograph	iv
Biographical Statement	v
Interest in Accounting and Initial Experience	1
Move to Medical Library Association	6
Development of Automation at MLA	7
Financial Objectives and Cost Centers	11
Annual Meeting as Source of Revenue	14
Hotel Negotiations	15
Funding of MLA Programs	18
Working with Treasurers and Board of Directors	20
Importance of WiFi	22
Centralization of Section Dues Collection	25
Revenue Sources	28
Meeting Planners	30
Annual Meeting Audiovisuals and E-Conference	32
Annual Meeting Programming	38
Headquarters Building Leases	46
Headquarters Staff and Members	49
Challenges for Association and Profession	52
Index	55
Curriculum Vitae	58

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 Mark E. Funk  
on May 7, 2019. 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 \_\_\_\_\_.

Ray Naegele  
Name of Interviewee

[Signature]  
Signature

Date 5/7/2019

Accepted by: [Signature]  
MLA EXECUTIVE DIRECTOR

Mark E. Funk  
Name of MLA Interviewer(s)

[Signature]  
Signature

Date May 7, 2019

Date 10/9/19



## **Biographical Statement**

For thirty-six years, Ray Naegele was part of the Medical Library Association headquarters staff, primarily as director of financial and administrative services. He worked with three executive directors, other staff members, and numerous MLA members over the decades. He provided leadership in building a financial planning model for the association, implementing automation, overseeing the annual meeting, bringing outside vendors on board, and negotiating building leases.

When Naegele arrived in 1982 as business manager, he put professional accounting standards in place and began adopting technology. He was promoted in 1985 to the director position. He instituted a business plan for the association that reflected strategic planning and annual priorities and made more sophisticated budgeting possible. Cost centers were assigned to categories of financial objectives, depending on how much revenue they generated and their place in association activities. He streamlined dues billing and oversaw the centralization of accounting for MLA sections. He incorporated technology advances as they became available, bringing computers in-house and automating functions such as membership records and meeting registration and eventually every management activity. Naegele was responsible for headquarters office space and negotiated long-term leases for 919 N. Michigan Ave., 6 N. Michigan Ave., and 65 E. Wacker Pl. He served as interim executive director in 1991/92.

Naegele built the annual meeting as a dominant revenue source, increasing support from exhibitors and making use of professional meeting planners and outside providers. He incorporated technology for audiovisuals, speaker and attendee support, recording and distributing proceedings, and e-conference capability. He coordinated the redesign of programming and abstract submission. He was the point person for contracts with hotels and conference centers.

He partnered with MLA members to help them achieve their goals, particularly presidents and the Board of Directors, treasurers, and National Program Committees. His hard work and approachable attitude were valued by all, and MLA conferred honorary membership status on him in 2019. The award citation noted that “[h]e made MLA resources work harder for members through his vision, ingenuity, expertise, and youthful energy.”

## Medical Library Association Interview with Ray Naegele

*[WAV File pt 1]*

MARK E. FUNK: This is an MLA Oral History Project interview with Ray Naegele. We're at the Hyatt Regency Chicago hotel. Today is Tuesday, May 7, 2019. The interviewer is Mark Funk. I want to thank Ray for taking the time to help, both with the interview questions and for meeting me for a few hours to tell his story to the many present [Medical Library Association] members who know him and to future MLA members who want to know more about the association's history. Ray is a well-known public face of MLA and there will be many, I'm sure, who will be curious about his history and his reflections.

I want to begin with some personal history, your origin story, as they say in the superhero movies. Tell me about your childhood—where you grew up and any circumstances that set the stage for your later education and career.

RAY NAEGELE: I grew up in Chicago through second grade, and so we moved to the suburbs—in Chicago there was a large number of people who moved out to the suburbs. We moved to a place called Des Plaines, which ended up being under the airport runway.

MF: That was O'Hare?

RN: O'Hare, right next to O'Hare. But it was a good existence to grow up in, I think. There were a lot of kids, so that was good. My dad had about twenty or thirty jobs, probably closer to thirty in a span, at least that I can remember. The earliest one was, he worked at University of Chicago as a computer operator on one of the earliest IBM machines. His boss said, "You can audit the classes and you can get a degree, no charge."

MF: Nice.

RN: He did that for a while and decided that wasn't for him, because he felt he wanted to be an entrepreneur. He had just a whole host of jobs—a liquor store, which got robbed, and then my mom made him sell it. He owned a restaurant, which was quite successful, and then the Village of Niles wanted to condemn the property to widen the road and make a bigger intersection, so he had to sell that. He had some misfortunes as far as that goes.

But throughout all the process, the thing that linked it all together was, it seemed like he was always—and my mom was—always doing a lot of paperwork. Being entrepreneurs, they didn't hire an outside accountant. They did all the work themselves. We would hang out and we would watch them do their accounting work, which seemed, "Oh, this seems not hard."

MF: Sort of interesting.

RN: Yes. So that gave me exposure to the world of accounting. Because it's critical—if you're an entrepreneur and running your own business, you need to know the revenues and expenses to project out.

I grew up and went through high school. For my high school commencement—this may sound really corny—but at commencement exercises, we had a keynote speaker, Johnny Morris, who was a Chicago Bear football player-turned sportscaster.

MF: I remember him.

RN: Yes. He gave a wonderful talk on goal setting to the thousand kids who were in our graduating class. He said, "If you want to get ahead in life, you've got to set goals and work toward them. It doesn't matter what they are. Look at me. I played football, now I'm a sportscaster, and I accomplished all of that by goal setting. And if I can do it, you can do it, too." It's so obvious, but it isn't to a high school kid.

MF: That's true.

RN: Yes. But looking back on it now, that was an important talk, and I'm glad the school brought him in. I went through college, and it was always an easy choice: it was accounting.

MF: Where did you go to college?

RN: SIU—Southern Illinois University. I used to joke around that it was the first thing in the catalog.

MF: Alphabetical, accounting.

RN: Yes, accounting, so it was easy. A lot of my friends didn't know—they were liberal arts and they weren't sure what they were going to be doing. And accounting seemed secure, because you've got a profession attached to this major, so it seemed more defined than many people's. I felt secure that there was a path, a pretty clear path going on to getting a CPA [Certified Public Accountant] and then advancing. And I always kind of gravitated to not-for-profits.

MF: So that was an option in classes?

RN: Not so much an option, but the accounting for nonprofits isn't all that terribly different than accounting for other business enterprises. They're separating a little bit more, but back in the '70s, they were pretty similar. My first job was for Central States, so when I graduated, I worked for a nonprofit.

MF: Tell us what Central States is.

RN: Central States was the Teamsters' [union] health and welfare pension fund.

MF: Is that for Illinois?

RN: Nationally. So it was a pretty big organization. That's where Jimmy Hoffa was the head of the organization and vanished. Amalgamated Insurance was run by Allen Dorfman. I didn't know him—I saw him but never really interacted with him. But he was shot [in 1983] in a parking lot after lunch in a hotel in what used to be the [Purple] Hotel [or Hyatt House Hotel in Lincolnwood], if you're familiar with Chicago. And that was big news back then, because everyone thought he was kind of untouchable. I digress. So Central States had kind of a bad reputation, or I should say kind of a tainted reputation, in the world.

MF: Because of the Teamsters?

RN: Because of the Teamsters and so forth. Now, in accounting, we recorded all the revenues coming in. We had a team of twenty people doing reports and analysis.

MF: That's a large team.

RN: It's a large team. At the time, they had eight billion in assets. That was all the money people contributed. And that was invested in different enterprises, and we would get monthly statements, and we had to record and summarize it. And everything was paper-based.

MF: Of course.

RN: We had manual ledgers that were a foot high, and we'd go and log them all in and then run a tape and total them all.

MF: Wow. Accounting in 19...?

RN: 1977.

MF: After you graduated.

RN: That's how things were done. After a while of doing that, we brought in an accounting system called Software International, which was the first real automation transition.

MF: And that ran—

RN: A general ledger. It ran on an IBM 370. There was a big, air-conditioned room that had a bunch of these 370s, because they had all the processing of all the numbers. That was cool. I got a really good job of doing reports and analysis and generating the reports each month that came out of it. We had to go to what was a high-level coding language



to create reports to give out to managers so that everyone could measure how investments were doing. It was much more powerful and kind of amazing for the day.

The salesman for Software International asked me out to lunch and said, “Hey, would you like to come work for Software International? You’ll get a lot of travel and a lot of stuff.” He made it sound really glamorous. And so I said, “Okay.” I had been with Central States for about four or five years and then decided, well, this is nice, but it felt confining to someone who was in their early twenties and wanted to do more, see the world.

Software International’s primary client base was Fortune 50 companies, who were installing mostly IBM 370s in automating their accounting operations. My job was an educator to train the accountants on how to use the general ledger and receivables and payables, as well as doing sales support, going out with the salespeople when they were making a pitch. I would go there and say, “Oh, yeah, we can do that. The software will do that,” and try not to overpromise on what the system could and could not do.

I got to go to a lot of different places in the Midwest and then a lot out west. My favorite was doing Duty Free Shoppers in Hawaii. I went out there a couple of times to help them convert—and I remember the controller was Glenn Tasaka. I went for the first time to a sushi bar for lunch.

MF: Pretty exotic for the ‘70s.

RN: Yes. I had never gone to a sushi bar, so looking at it, where’s the burger. It accomplished that purpose, but it was a very time-consuming job. We didn’t have any support. You had to prepare your lesson plan, do your consulting, talk to the client, and then get your tail out to the client’s location. Nothing was done electronically. There was no Zoom. Conference calls were limited value. We would generally do small presentations of ten to forty people depending on the size of the accounting.

MF: So you would be in a classroom? And would you have overhead—

RN: Yes. We had the old overhead projector with the acetate sheets, and we’d make notes on it and point to how the data moves through the system and the different file structures and how to put it in and take it out. I found it to be kind of exhausting, because you’d come back and then, okay, Sunday night rolls around; I’ve got to get ready for Monday. I thought, well, there must be something that’s more interesting, and that’s better and more stable, because you have to travel and see a lot of things. I started looking around, and one of the things that I found was an ad—I think it was in the *Tribune*—for a business manager for MLA.

MF: Now, before that, you took some time out to get your CPA. What was involved with that?

RN: That was at Central States. The CPA is a two-and-a-half-day exam. You go to a location on a specified date with 500 other aspiring accountants, and you fill in little bubbles.

MF: How did you prepare for that? Were there courses or was it just your previous knowledge?

RN: I took Becker's CPA Review course. I don't know if you've heard of that. I think they're still in business. They did a great job of preparing me for the exam. It is a combination of audio recordings from Newt Becker, and then they have a TA running the slides, or the acetates, and keeping up with the audiotape, and then if someone had a question, he would stop the audiotape and follow up on the question. It was a pretty big class of people taking the review class. I found it very useful. It had a lot of mnemonics to help remember all the different transactions and how to treat them, and so he provided some good, useful techniques. I hadn't had that much exposure to mnemonics because I didn't use them in college, but now I find them useful.

MF: So you passed the test.

RN: I passed the test. Actually, it's a five-part test. I passed four parts and had theory left. I didn't pass that. You've got to get over a 73, I think, is the cutoff, and then it's called a 'conditional,' so I got a conditional. I had to go back six months later the next time it was offered and retake just that one part, which, I thought, well, this is a piece of cake, because you're not focused on five parts; you're focused on one. I passed that, and then that was it. I had to do it in two steps. I counted it as, instead of getting a home run, I got two doubles.

MF: Now, a lot of people may not understand the difference between, say, a degree in accounting and a CPA, so what is that difference, and what did that offer you in terms of job opportunities, etc.?

RN: The accounting degree is the baseline entry point for the profession, and it prepares you to do all kinds of accounting. But to really progress and advance, you need to have some other credentials, and a CPA offered those. It validated that you were a professional and that you have a competency—a lot like AHIP [Academy of Health Information Professionals, MLA's credentialing program].

MF: It's like a base level of knowledge that is assured.

RN: Right. And for public accountants, a CPA is definitely required. You can't audit. You can assist with an audit, but a person is not allowed to be an auditor without having passed the CPA exam in their state. If you move to Florida or New York, it means you've got to take the CPA exam again. Some [states] have reciprocal arrangements, but the CPA, in a way, protects the profession from anybody going out there and declaring themselves an auditor, so that way, it's kind of a filtering process. You have to be licensed, and the state keeps track of the license. If you have an auditor, you can always

check the state that they're operating in, and they'll have their number and they'll be in their database as a licensed CPA.

MF: You got that in 1980? When you were still at Central States? And then you went to Software International. So you were telling me that you saw an ad.

RN: An ad in the paper for a business manager, and... it sounded appealing because it had a variety of duties—and a business manager, what's that. It's a little bit more expansive than accounting. That kind of had appeal. And I checked out MLA, what it was about and applied, and then got a call to come in and interview for the position.

MF: Who was this that called you back and interviewed you at that time?

RN: Ray Palmer was the executive director, and the association was in need of an accountant. [Editor's note: Both Palmer and, subsequently, Naegele joined MLA in 1982.]

MF: There was a previous accountant.

RN: There was a previous accountant who Ray fired, so the position was empty for six months. Things were stacking up. They went through the search process. My first interview was a team interview, and I think half the staff—there were about fourteen or fifteen staff, and I think all the managers were in on the interview, so it was quite a team on the panel, which was great, because it gave me an opportunity to meet the other members of the staff and for them to meet me and understand what I was all about and why I was interested.

I remember one question in particular Ray Palmer asked: "Why are you interested in this position?" And I said, "Well, because I think it's going to change. There are going to be a lot of changes coming, and that's what interests me." The opportunity to do new things and install a manual accounting system at MLA, at the time, and bring in computerization. I just thought there were tons of ways to help improve things and a lot of opportunity and a lot of potential.

MF: What were your main duties then as the business manager of MLA? And I think this was 1982, according to your CV.

RN: Yes. There were two staff, Bert [Bertha] Puehringer, who was kind of an accountant, and then we had another person who was almost a student. The first duties were to catch up and get oriented on the accounting records.

MF: Because they were six months without an accountant.

RN: Yes, six months behind. And Keith Mueller, the auditor from MLA, helped a great deal, showing me what he knew about things and the structure of the financial statements

at the time. At the time, we had statements that had income and expenses and a bottom line. We didn't have the program areas measured financially.

MF: And this was just simple addition and subtraction.

RN: Right. And we didn't even get into budgeting a whole lot. Very rudimentary budgeting, so there was a lot of opportunity. There were no endowments, no reserve fund—money was over here and it was earmarked for emergencies. We had a CD [certificate of deposit] with Cunningham [Fellowship] money that Eileen Cunningham had donated and we still had that—

MF: Which is still going on.

RN: Yes, it is still in effect. So, the first amount of effort was just to get familiar with the situation and put processes in place where we could manage this. For membership records, we had a service bureau that was located about a half-mile away near Northwestern [University Medical School] on Superior. And that was a day when companies contracted for computing power with service bureaus. They would buy an IBM or an Amdahl machine, set it up in an office, route it, and then install programs that their customers needed, and then there would be a dedicated line with some terminals in the offices of their clients. When we wanted to print a roster of members, we would go to the terminal, request a roster, and then we'd have to either take a cab to the service bureau and pick it up—because they had the printer—

MF: They printed it out for you.

RN: They printed it out. Or they'd have a messenger drop it off—which is like a day turnaround; it's very slow. And that's how we got mailing labels to mail out the *Directory [of the Medical Library Association]* and the *[MLA] News*. You always had to remember to order the mailing labels ahead of time, but you can't do it too far ahead of time because you don't want to be out-of-date.

MF: Your membership changes.

RN: Yes. And when members said, "Add me," or "My address changed," we had the terminal where we could take that information, enter it in. We had a membership person who took care of that, and it also generated the invoices for subscriptions and membership renewals.

MF: So you'd get these labels and the staff would stick them on?

RN: No. We'd get the labels and we would send it to—at the time we were using A Top Notch. They were a printer in the West Loop. They would print the *News*, they would take the labels. They had a machine that slapped it on, and then they'd take it to the post office and send it off. So that was all outsourced. Same thing with subscribers. They

were right with that flow. But that was state-of-the-art back then. It sounds so archaic today.

MF: But it worked fine.

RN: It did and it didn't.

MF: So in 1985, you became the director of financial and administrative services at MLA. Now, was this a new position, newly created?

RN: Yes. It reflected added responsibilities that were given to me—that Ray gave. He said, well, we need someone to do this and do that. And as we were able to streamline operations, it made it possible to take more responsibility on. We brought an in-house computer system in, which was much improved [over using] the service bureau. That gave us a chance to do member records and accounting and have a printer in-house. Our turnaround time on things was vastly reduced and much more convenient. We were at 919 North Michigan Avenue.

MF: Yes, I remember that old office.

RN: Yes, beautiful views. We took the mailroom and installed an air conditioner in the window thirty-two stories up. It had wood around it and it was all framed out so it wouldn't get sucked out. And that air conditioner—it was a big air conditioner for the time; they had to bring in additional electric for it—that kept the room cool for the computer. I was trying to remember if it was an old Amdahl. It was fourteen-inch reels, and we had to do backups every night. We had them stored, and did the father-son-grandfather routine on them, so we always had—

MF: Multiple generations of backups.

RN: Right, multiple generations. We could always go back. We didn't have any computer viruses. It was always just, if there were any glitches in the system, we had to go back. That was way before—

MF: Really before the Internet.

RN: Before the Internet, so, obviously, our computer didn't communicate with anyone electronically.

When I started working at MLA, I was living in Des Plaines. I had a condo up there. And the commute was horrendous.

MF: How long a commute is that?

RN: It's about thirteen miles, but coming down the Kennedy [Expressway], it's just bumper-to-bumper in rush hour. So, I thought, well, I've got to do something about the

commute. I got an apartment on Division just off Lake Shore Drive that was within walking distance. And it was a great setup, because it took, like, seven minutes to walk to MLA, and it's down Lake Shore Drive, so it's a nice walk. It was good, because around eight o'clock at night, I could walk to MLA and change the tapes. We had so much data that one reel didn't do a full backup. So around eight p.m., I could go on and put on reel number two and let it run.

MF: So you'd go home and then come back?

RN: Oh, yes, go have dinner and stuff and then come back and throw the second reel on. It was that silly/archaic back then when you think now with the storage devices, but that's what we had. It was exciting, though; it was just really cool to have a machine that you could program, you could do the reporting on, and it was a huge advance, even though your phone has more power than that machine did.

The next stage was probably around 1988. We brought in a new, more powerful machine that was much smaller, and we got new applications for it that were more powerful. We added word processing, so we had to put a work station on each staff member's desk. Now we really distributed the power of the computer, which made it more useful. The word processing was, again, by today's standards—someone said it looked like the old WordPerfect, the first version of WordPerfect.

MF: So you had your minicomputer, whatever it was, and then dumb terminals throughout the office.

RN: Yes. And that was '88, when PCs were just beginning.

MF: Beginning to hit the offices.

RN: Yes. But this seemed like a cost-effective solution to take MLA where it needed to be. And the programming—we worked with DMG—Data Management Group—out of Oak Brook, and they had a programming language called the Pick operating system that was written by Dick Pick. It had a really powerful query language that would be able to do great reports, and report on any characteristic or any field you wanted and have it sorted. The syntax was very easy to use when requesting reports. The start-up time to gain access to the data was minimal, and it really didn't require programming. It was very user-friendly. The place it fell down—it was all kind of a big file. The multivalued fields were the part where it really had trouble reporting on.

MF: And what are those?

RN: Where there's a lot of data rather than breaking it into little fields, like your first name, last name, city, state, zip, and so forth. If that were all mixed in with one, you'd put your first name, last name, and city all in one field. That it could not really report too well. You'd end up with a lot of results you didn't want. And then we'd call the programmers in and they'd write a solution for it. We weren't able to access the data of

multivalued fields. There were a few instances where we had to do a multivalued field, such as with annual meeting registrations, where you've got a lot of courses and everybody's different, and a lot of events. You might have an event and the next person doesn't, and all that goes into one field. And so we did a programming solution.

This computer also could do confirmation letters for the registration; we used it for in-house registration. We received all the registrations for the annual meeting and then input them into the system. We did all the accounting on it, all the membership on it. It was really a little workhorse.

MF: And this was back when all meeting registration was done by mail, too. There was a form that was in the preregistration packet that members had to fill out, send to headquarters, and then you had to input it into your computer, which then produced the confirmation letter, the tickets, the badges, all of that.

RN: Yes, and the attendance reports and everything were produced in-house. It wasn't portable, so we couldn't take it to the meeting site. We had to make sure we had everything that we needed. If we needed a report that we didn't generate, we'd have someone at headquarters produce it and overnight it.

MF: Oh, my.

RN: That was the downside. Another limitation of it was that when we were on-site, and as you know, we input the badges, so if there was a typo or someone wanted their name changed or if they moved, we would get out an old IBM Selectric typewriter and approximate the font that we used for the badges, and we'd have to type a new badge for the person. And for on-site registrations, we had to type out badges. The lack of portability was a real hindrance.

MF: A lot of MLA members see headquarters as sort of a black box—things go in and things come out—and don't necessarily understand what's going on to maintain it, as you're talking about. So, I'm going to ask you some questions that will be your chance to explain kind of what happens backstage about which members aren't really aware, what's behind this curtain where the magic is happening.

Financial and administrative services, I think, were part of your duties, which goes far beyond accounting of income and expenses, which was what it was when you first started. Let's first start with the financial side. Can you give us an idea of the scope of the financial management of the association? What comes under financial services and what is included in all of that?

RN: Well, financial services is responsible for ensuring that all the money due MLA comes into MLA. Its principal sources of revenue are, of course, dues and subscriptions, as well as exhibit sales [and other annual meeting revenue] and ad sales. Those are the bulk of the income. And then we would make sure all the bills got paid, and so we'd issue checks for rent and so forth.

The services part is general ledger reporting. We did it quarterly—revenue and expenses—for the association. Initially it was all on one page without the cost centers, and then about 1987—I might have the date wrong—we put in place the financial plan, and the Board [of Directors] approved the financial planning model. We put in program areas and assigned financial targets for each of the program areas. One was membership. That's where all the dues went and the costs to maintain the computer system that maintained membership and then a portion of salaries and rent. And of course, that's where all the revenue showed. But it was dues funded.

We had the four categories of dues funded, subsidized, cost recovery, and entrepreneurial. Those were the four financial objectives, and the cost center could be assigned to any one of those four. So, membership would have dues funded. The other one was publications. The *Bulletin [of the Medical Library Association]* and *News* at the time were separate, so we could measure those. And they actually generated net revenue, especially the *News*, because of advertising. So, they were classified as entrepreneurial. It was a member service, it was important, but it could bring in more revenue than it cost to produce the *News*, and that revenue in turn is used to support other areas of the association. We had CE [continuing education], which was pretty strong in revenue because of supporting the [MLA] chapters, which was a small part, but then the annual meeting CE, where we had four days of CE courses.

MF: Right, and it would be a day or two ahead sometimes or a day or two after.

RN: Right, and maybe a post-conference symposium. It was very popular and many attendees took pre- or post-conference CE. It made the meeting about eight days long for some people, so seven or eight days would be the whole stint. So, CE did well, and especially in the late '80s and the early '90s, when the Internet was starting to become—

MF: Commonplace.

RN: Yes, and everybody had to know it in their library. And one of the places that they could get the information was going to an MLA CE course. That created a waitlist and such a strong demand for courses that were related. If it had 'Internet' in the title, it sold out in a heartbeat.

MF: People wanted to take it.

RN: Yes. And we had a thing where members were complaining because the Midwest folks got the program earlier and they could turn it around. And we also began accepting fax registrations, so...

MF: So people in the Midwest would get their preregistration packet earlier than people on the coasts.



RN: Exactly. So we heard that and we worked with A Top Notch, and they kind of staggered them so that it was more even. But it still wasn't a perfect system.

MF: Because this was, I think, second class mailing?

RN: We alternated between second class and first class. We liked first class because it got it there faster and with greater certainty, and second class, the postman could deliver it at their convenience. So we never really knew when people were going to get it, and then we'd get calls saying, "I never got my..." And it's by route, so people in an institution might have their program, and someone else who may live in a far suburb and the postman hasn't gotten around to it yet, they'd call and claim they didn't get it, and say, "Send me a new one," thinking it might have gotten lost in the mail. So we would send it out. We sent a lot of extras out, and we figured it's just better to send it first class. Just better service. Fewer calls and more certainty that it was going to get where it needed to be.

MF: So you've talked about the other cost centers we had. We had the publications, the membership. Education, which was popular, and that created revenue.

RN: Right, but it was labeled as cost recovery, as I recall, because some years it did better than in other years. And then we had governance, which was dues supported, because that was supporting the board's travel to the board meetings and some of the legislative activities. Then we also had accounting and that kind of rounds out the program areas. We were also dues supported because we didn't really have a product that we could sell.

Then we had allocated expenses, where the rent, staff, the things that were common to all the departments or cost centers, we put them in there and then we would allocate that cost to each of the cost centers based on revenue that the cost center brought in. But then we changed it and we went to staff time. We had asked staff to fill out time sheets and estimated the amount of time they spent on each of their activities, because so many people had multiple hats, especially when we were trying to do the *News*. Under the publications area, we had the *Bulletin*, the *News*, books. It was all the same staff working on it, but we were trying to measure how profitable or not profitable those activities were.

MF: How big were the finances of the association back then, say, when you started compared to—

RN: Well, in 1982, it was about \$600,000 in revenue. [Editor's note: Palmer reported at the 1982 Annual Meeting that MLA's budget exceeded the \$1 million mark for the first time, although with a deficit of over \$100,000 in revenue; he compared it to 1978's budget of \$600,000.]

MF: And a lot of that went out as expenses.

RN: Yes. It was pretty much break-even and deficits and such. MLA, in reading past treasurer's reports, it has a recurring problem with not having enough revenue and having a large agenda of things it wants to do. And it's common; that's not unique to MLA. It's common to all associations. It becomes a matter of prioritizing and allocating the revenue to the areas that seemingly would best serve the membership.

MF: And how was that allocation process done then?

RN: Well, it evolved as the budgeting process became more sophisticated with the cost centers and putting together a real business plan. That's one of the things I did. I didn't want to have just a budget; I wanted a business plan with environmental scan—internal and external—as well as the priorities of the association. Back then, we were just getting involved in doing a tremendous amount of strategic planning. The board was working with members and gaining input to figure out, well, what do we need to do? We know things are changing. How do we accommodate that change, and where should we be headed? There was considerable discussion about changing the name and taking the word 'library' out [of Medical Library Association].

MF: I remember that.

RN: People were thinking farther out and trying to think big. And I think it's come true that people don't use the word 'librarian' anymore; they use 'informationist' and have created all kinds of new titles. Back when this was coming up, we didn't have that vocabulary; it didn't exist. But the members were on the right track and the board were on the right track: things were going to change.

With the priorities, we would write down the current year's priorities and what we had accomplished as part of the business plan, and we would write down how the budget supports next year's priorities. We documented it. And staff did not set the priorities; we were following [members]—if someone said, "Well, we want to have a symposium," we would make sure that that was in the budget. If we were going to have a strategic planning meeting and that had to be funded, we would put that in the budget and make that a priority. It comes under the heading of 'action plans,' so we got the priority and then the action plan to support the priority.

There were a lot of them, as you can imagine. It got to be quite a lengthy document, and sometimes we had too many priorities. I talked with Ray Palmer, and we came up with the idea of—I said, the president comes in with ideas and they want to do things. Let's ask them for their top one or two things that they want to see get done in their presidency. And that took hold. Lucretia McClure [president in 1990/91] was one of the first people to really do that, and she did a couple, like three priorities—these are things I think are really important and want to see get done.

We had other presidents who had twenty things—[laughter]—and then it kind of fell apart at that point, because now you've got too many to really focus on and it just kind of overlaid the strategic plan and priorities and things, and we didn't want to have

competition. We've got the strategic plan—that's where the association should be going—and we don't want to create another twenty priorities, because now we're—

MF: Too divided.

RN: Yes. It's the herding cats things. The cats are running all over in every direction, and we can't get them to go in one direction. Getting some focus—where to put the money, where to put the resources, where to put the staff time. And do we need to add staff, subtract staff? Where? Especially in professional development, what needs to go on there to organize more classes to support the instructors?

And publications: Do we get the books program going? It took a tremendous amount of staff time to see a book from beginning to end. And the authors were always frustrated because it took so long. But the books program was important for the association. It couldn't really get it off the ground because it was always starved for resources.

I remember Judy Biss was the director of publications when I first got there, and she worked mighty hard with—and was good friends with—Jana Bradley as editor of some of the books. Judy worked and worked and worked. She worked long, long hours on the books program, because that was just layered on top of the *News* and the *Bulletin* and the other production things she had to do, and there really wasn't funding. The books didn't bring in enough revenue to support hiring someone, so they always just got layered on top of everything else, and it really needed a staff member. We tried outsourcing it. We went with Scarecrow Press. I don't know if you remember it.

MF: Yes, I remember that.

RN: We can't sustain this in-house, so let's see if Scarecrow Press would handle it. And they took it on. They were a small operation.

MF: They specialized, I think, in library publications as well.

RN: Yes. And that made it, I think, more acceptable to authors. They were a little less frustrated, and if they were frustrated, they weren't frustrated with staff [laughter]. But it helped. The books are important to the profession. It's just really hard to get them from beginning to end. And the authors didn't generate any revenue from it. After the hundreds and hundreds of hours they put into a book, they might have been earning seven cents an hour if you calculated that out, based on royalties. It was much better teaching CE courses. If you wanted to be involved in the association, that was probably more lucrative.

MF: Back then, you mentioned the budget was about \$600,000. What's it now?

RN: It's about \$3 million—bouncing right around a little over \$3 million, up and down. It depends on membership—how many members there are. But it grew fairly steadily over the years. The other part is the annual meeting grew tremendously. I think that's

what really propelled MLA, and it made up for the decline in CE revenues as well as the loss of advertising revenues and publications, because nobody advertised in the paper publications anymore.

MF: You said the annual meeting grew. Was this in terms of attendance?

RN: In terms of attendance and in terms of revenue. It supplied 50% of MLA's gross revenue. It was more than [registration fees]. It was because of all the activities in there. Vendors made up a large portion of that—their booth fees and their contributions over \$150,000 that they would contribute over and above that to be sponsors—the different things that helped enrich the meeting. The sponsorship grew because Majors [Scientific Books] had a big hand in that. They said, "You know, you guys could really be asking your exhibitors for help in paying some of these things and supporting the meeting."

MF: So up until then there wasn't really that donation aspect of the vendors with participation; it was mostly just the booth fees.

RN: Right. They said, "You could do better!" We said, "Well, okay, we'll give it a try," and it grew from \$20,000 to \$150,000 at its height. It depends on the economy. If the vendors are doing good, their marketing budgets have more money and then they have more to support MLA. But that's a whole 'nother topic of discussion: what to do with corporate partners and sponsorships and things. But that was a nice help to the bottom line.

Registration fees were important. It's so important to have a lot of people at the meeting. We have fixed costs at the meeting and if there are 1,200 people, you just spread those fixed costs out over a larger base. If there are 800 people—

MF: You have the same costs.

RN: Yes, the costs don't change—the speakers, the facilities. What does change is the food costs, but...

MF: I suspect a lot of MLA members don't realize the behind-the-scenes costs of a meeting. All they see is that it costs so much for registration, and they see that there is some food at various places, but they don't understand the different requirements also from the hotels or convention centers we use.

RN: Correct. MLA pays rent for the exhibit hall, but the facilities here are largely supported by members staying in the conference hotel. If MLA fills its block, that's a good thing, because the hotel is happy and they won't charge MLA for space.

MF: So by 'block,' the hotel says you have to have so many—

RN: Yes, like here, 1,000 rooms. That's peak night, 1,000 rooms peak night, and then it's kind of laddered down on the shoulders. They have a total of, like, 3,500 or 4,000

rooms for the total meeting, but 1,000 peak night, and then they add up all the rooms that are here. And if MLA fails to meet its room block commitment, there are steep financial penalties for that. In my time, the closest call we had was Seattle.

MF: Which Seattle meeting?

RN: [Editor's note: MLA met in Seattle in 2012 and 2017.] That was two meetings ago. We were at the Sheraton [in 2012], as the meeting hotel, and we didn't fill it up—principally, because there was nothing going on in town and all the other surrounding hotels cut their rates. When we contract, it's five years out, and we set the rate five years out. Well, it was 2008 when the recession hit, so our rate was high and the Sheraton wouldn't go down; they wouldn't drop it. And everybody else was—I saw rooms for \$200 and we were around \$250. I talked to long-time members who were supportive of MLA, and I had to agree with them. They said, when there's a \$50 difference, I owe it to my institution to stay at a nonconference hotel and save the \$50. It was just too tempting. So, we didn't make our room block. It wasn't because attendance was down; we had attendance. It was because the surrounding hotels were just too tantalizing at their low rates—which helped members; it was good for them. But it wasn't so good for the association. What we did, rather than pay a huge penalty of well over \$100,000—yeah, it was pretty steep, because basically what you're doing is buying all those empty rooms—

MF: It's a sort of a guarantee you make to the hotel.

RN: Yes. All the rooms that didn't get filled, MLA basically bought them. We negotiated instead to return to Seattle [in 2017]. And so about three years later, MLA came back to Seattle. I did a write-up and distributed it to the NPC [National Program Committee] and the board and we put it, I think, in the *News* or our blogs explaining that we had a situation where we had to contract back with Seattle in order to avoid a penalty. So, we went back to Seattle. Members like Seattle, so we went back to Seattle. It wasn't like a terrible place.

MF: And then the second time, I guess, we made our block.

RN: We made our block, yes, and so everything turned out okay. But it was tough. Even the second time we had issues with other hotels cutting the rates again, but the second time around we tried to contain the block size so we knew we were going to make it. It was very close. We just barely made our numbers in Seattle. That was a nail-biter the second time.

Seattle has a lot of hotel rooms, but, the times we were there, they don't have a lot of things going on downtown that bring in outside business travelers. There are no other meetings. For example, like in Chicago, right now we have the National Restaurant Association [Show] going on, so that creates what's called compression in the hotel business. The hotels in Chicago are full, and so if we didn't have this block, members would have a hard time finding rooms, because the city's pretty full. Now, the city has built many more hotels, which reduces the compression. A lot more offerings, and it's

helped alleviate that compression. But that's where, after the Seattle thing, it became more in tune with what's going on in the city when we're doing our five-year contract. What else can we forecast out that far? That's data that's hard to find because of the uncertainties of it, and the convention and visitors bureaus don't exactly know. But the restaurant show, which returns to Chicago every year, is fairly predictable. We feel comfortable there that the city will be—and Chicago's not empty. Not like Seattle. That was a shocker. You look around. There are no baseball games, so there's nobody at the ballpark. The Mariners are out of town. There's nothing. There's no festivals, nothing that brings people downtown.

You probably heard this: What's the most perishable item that is sold to people? And a lot of people say, like, lettuce; it goes bad really fast. But really the most perishable item is a hotel room. If it's not sold, you can't ever reclaim that revenue. If there's no demand, they'll try to generate demand by lowering their prices. Conversely, when there is demand, they will definitely raise the prices—they're demand-driven. And they're taking models from the airlines, too.

MF: They're doing the same kind of thing.

RN: Yes, very similar. There's someone called a revenue manager for a hotel. It's a new position. It started maybe ten or fifteen years ago. The revenue manager's job is to ensure that the hotel earns a minimum amount of revenue from everything—all the sources, mostly rooms, though, each day. And that's where all the reporting is geared towards, so that they know this hotel has a daily target amount that they have to earn. And they can forecast that, because they know how many rooms are sold, they can guesstimate on the outlets if they own the outlets or they just lease the space to a third party. Quite common. That way they don't take the risk, but they get a regular source of income.

With a salesperson, you can talk to the salesperson all day and say, "Well, the rate's too high. Lower it." All they can do is take the proposal to the higher-ups, and the revenue manager will look at it and say, "Well, it's not enough. Our target is here and you've got to bring it up somehow." And so we either have to buy more food, do more banquet, or something that would help bring revenue to the hotel.

We used to have the parties out at different places. The big farewell party used to be at different locations. The hotels want that food and beverage, and so if we want to get the best hotel room rate, if we commit to food for the banquet, when it was bigger—and the awards lunch, which was that, it was \$180,000, \$200,000 in F&B. And they would look favorably upon that. They'd say, "Well, if you give us that, we'll give you a break on the rate."

Those are some of the dynamics of the hotel negotiations. And I found it interesting, and frustrating—we would negotiate way into—like, I remember negotiating Christmas Eve. We were trading faxes back and forth on things, drilling down on what was going on.

The salespeople for hotels are driven by their numbers; they have to make their numbers to be successful. And they're measured at the end of each quarter and at year-end.

MF: So they're under a lot of pressure. And associations like MLA are under a lot of pressure trying to get the best deal.

RN: Under a lot of pressure to close the business. Yes. And I found that December is a pretty good time, even though there are a lot of distractions. But it's like buying a car: Wait until year-end. They want to make their numbers, yes, so you might get a little better deal.

MF: So like hotels, MLA has revenue that doesn't always come in like we want it to, but we have a lot of things that we want to be funded. How were those difficult decisions as to what either had to be lowered in funding or actually eliminated made?

RN: Well, we rarely eliminated anything. Even the [MLA] Exchange list stayed for a very long time. It was hard to eliminate a program.

MF: And the Exchange list, I think, goes almost all the way back to the founding.

RN: That was the first service of MLA. That was the founding purpose for having an MLA.

MF: A lot of newer members may not even know what that is. It was actually the journal Exchange list. And what did it do?

RN: It enabled institutions that had extra copies of a journal to exchange them with other institutions that may need that copy. The Exchange list was on paper of a hundred pages in fine type, and we mailed it out to all the institutional members. We would collect all of their lists—

MF: Their lists of duplicates.

RN: Their lists of duplicates—and they used to tape it together [laughter]. It looked terrible. We'd cut and paste it and send it out to a printer, who would photocopy it. And it didn't look at all attractive and it was really hard [to read] because the type sizes and faces were inconsistent. So we got into, how can we do this, and we set up an electronic version where people could enter their duplicates. And that improved it, and then we thought, well, we'll try microfiche, back when microfiche was around. And so, for a short time, we offered that, but that was not a really big hit, because people liked to mark on the paper what they wanted, and you couldn't do that on microfiche. Fiche cut postage but it wasn't satisfactory.

We kept trying different ways of making it better. And I remember at a board meeting, Wayne Peay saying, "Let's just kill it." And I thought, well, let's see. We really haven't put any money into the Exchange list in years. Let's see if there's anything out there that

could improve the service that would still be relevant. The large institutions had duplicates; it was the smaller institutions that required those.

MF: So it was feeding primarily from the larger institutions to the smaller ones.

RN: Yes. It was a very charitable, if you will, way of distributing things. So it still had an important purpose. But when the journals started going electronic, the Exchange list's purpose went away.

MF: So that finally ended. But not because of financial reasons, but mostly because the technology changed.

RN: It finally ended. Well, but it did, too, because members stopped ranking it on their system. I think even the other organizations said, "Well, I just don't have staff time to sit here and look through all of these. It's very time consuming. It takes hours and it's just not that beneficial to us." So, lack of interest from members and—

MF: Led to its demise.

RN: Yes, faded away, and then the transition to electronic.

MF: So other programs were not really eliminated, you said, but they obviously had to be reduced, probably, in several cases.

RN: Well, in CE—and I don't know all the details of it, but I know we had quite an extensive support system for scheduling and working with instructors to [teach] chapter CE courses. We'd work as a clearinghouse and line up instructors for CE, but that became a challenge because we were the middle man with the chapter and the instructor. And so we said, well, why don't we just try having the instructor talk directly to the chapter. It would be better if we just put a roster out of all the instructors and what they teach, and then the chapters can use that to go contact the instructor directly—because of logistics and the finer points of what their stipend will be and so forth. We had a set amount, but it never changed; it was like \$300 or \$150. It was a very small amount. That's an example of where we were able to save staff time getting caught up in having to do that. Other areas that were cut—well, the books program with Scarecrow—we outsourced it.

When we talked about dues increases, we often found it helpful to provide examples of what might happen if the increase did not pass. It would be like cutting back on CE programs and offerings, and the publications. There really weren't a lot of things we could easily say we would stop doing if it didn't pass, but it was important that the dues increase pass. The logical question is, well, what if it doesn't? But expenses continued to go up and we needed some way to offset that. That's why the annual meeting was a way—and how it grew to 50% [of revenue] was—that was a way to fund the association without a dues increase.



MF: Right. I'm trying to think over the years that I've been involved, there must have a time or two when the dues increase was not passed.

RN: Once, as far as I can recall; there was one time where it didn't pass. And then the next year, the staff put together, with members—did a better campaign on the reasons for it. I think we did telephone trees.

MF: Yes, to build support.

RN: The board and very involved members had a list of other members to call.

MF: So that year with no dues increase—that was necessary, you got by.

RN: We probably had a deficit. It makes it really tough to keep things rolling without having the funding. And if it was multiple years of deficits, of course we would have cut things. We would have had to cut staff, some things, because we can't keep running at a deficit. And some years it seemed that way.

MF: So every two years, there's another MLA treasurer comes into office. They've served one year on the board, and when they came on the board they were named as the treasurer-elect or treasurer-to-be. I know from personal experience that you work closely with the treasurer to get them up to speed. Can you tell us what you did to get these people—who mostly did not have backgrounds in finances or accounting—how did you get them up to the level where they could easily communicate with members about the finances of the association?

RN: Before they took office as a treasurer, we had an orientation. Initially it was one day, but lately it was an afternoon. It's kind of compressed.

MF: It's a compressed boot camp.

RN: We have much better use of electronic communication, so face-to-face time isn't all that critical. The orientation consisted of a sit-down with myself and an overview of what's in the finance manual, because that reflected the policies and procedures of the association and that's kind of what we follow; we adhere to that. We brought in our auditor, the partner in charge, who would explain what the auditor's role was, and then we'd go through the audit and financial statements, what each report meant. And a lot of it's pretty dense and not easily understood without a financial background.

We also brought in our investment advisor, who has discretionary control over MLA's investments. They play a very key role, because that is MLA's assets. MLA doesn't have buildings; it doesn't own anything. We've got some desks and the PCs. That's all it owns. Unlike a university, where they own tracts of land and buildings and a lot of other assets, MLA's only asset is really its endowments and its Association Stabilization Fund. They're the person—or it's their firm—that handles the investments. I would not want the role of having to decide what to buy and sell, and we always wanted to have it

with a professional, who, that's what they do. We've been with this firm a long time. They handle pension fund money as well as the investments of wealthy individuals. And we've had fairly consistent returns. [During] my time, I was always frustrated that we didn't get higher returns. But the lows weren't as low as everybody else's returns, and the highs weren't as high; it was always kind of middle road, which is a comfortable place to be.

MF: Because you want the security.

RN: Yes, preservation of principal is key. So the treasurer would meet with those two people, because they're huge players in MLA's finances. And the other things we do is, the auditor and the treasurer exchanged information—email addresses and phone numbers—so that if the treasurer ever had any questions or issues, they could bring it directly to the [auditor], which is actually required by auditing rules—that the board have direct access to the auditor. Doesn't always have to go through staff, for obvious reasons. Enron was a big driver of that.

MF: Rules were made after that.

RN: Yes, after the Enron incident, because the board at Enron didn't have direct access to the auditors; they went through staff. They had no formal channels, but that's changed.

MF: Like a lot of organizations, MLA uses a lot of technology for its financial management and its day-to-day operations. You talked a little bit about the level of technology back in 1982, so what other kinds of technological changes were you able to bring in over the years? You first started with the leased services, and then you had the Amdahl in-house with the dumb terminals. I suppose at one point you switched over to PCs.

RN: We did. It was probably in the late '80s, '90s, when we switched. We bought PCs for everyone and connected them to the Internet and hardwired them up. And then we had a new application put in and we used new accounting software. Everything was new. Then we had training programs.

MF: Lots of training required.

RN: Lots of training. And it greatly improved word processing.

MF: Much better than that dedicated word processor from the minicomputer.

RN: Right. Oh, that was a dinosaur compared to what Word can do. Spellcheck? That's wonderful! What a great concept. The other thing is, we were able to use the Internet and send emails out, whereas [previously], we had a TI Silent 700. It was kind of a briefcase-sized machine. That was the first acoustical connection.

MF: And you had a thermal paper printout.

RN: Yes. And that was the first instance of emailing.

MF: Before that, communicating with members and vendors, etc., was all either phone or by mail.

RN: Yes, a lot of phone work and a tremendous amount of mail—but a lot of phone, because it was more instantaneous. We were on the phone all day, it seemed, talking to people about various things. That was the primary mode of communication. It was important.

Prior to Internet, we would prepare the documentation for the board meeting and it would be a foot tall of paper. It was enormous, because everything was printed out and UPS'd out. The amount of time it took to photocopy all that and collate it, sort it, package it, and get it to the UPS shop, it took a couple of days just to prepare the fifteen or sixteen packages that we had to mail out. And then I'm sure board members weren't thrilled to get that, either. They weren't looking forward to it.

Now, I think it's so much improved. The agenda goes out for board meetings. It's all electronic, and everything is now keyed, so when you see an agenda item, you can hit it and it will scroll down in the documentation to that item. You can actually get through the thing much more readily, and you can skim the whole document and hit the points that are really important.

MF: I was kind of on the edge of that on the board. The big packets that would come in, I'd have to take it apart and put it into three-ring binders, and then read that and carry it on the plane. So now I assume most board members just come and they have a laptop.

RN: Exactly. The most important thing for the board meeting now is having Internet connection, wireless, WiFi. If WiFi is not working, things kind of come to a halt. But everybody has their little laptops, and it's much better, and much less paper. And they're more efficient. The meeting just seems to run much better.

The other thing is, with the pre-meeting or the ongoing Zoom and other contact modes, the board meeting is so short now. It's really coming together face-to-face and make decisions, make approvals. The background has all been discussed. People have already figured out what they want to do or have thought about it and asked their questions, and so it just makes the whole process go much more smoothly, and board meetings are much shorter now.

MF: And I think there are even virtual board meetings.

RN: There are. I think Kevin [Baliozian; appointed MLA executive director in 2015] is doing monthly meetings now with the board for an hour or so of virtual meetings. It

keeps the board involved and there's an agenda, and so the topics of the meeting are different based on what's happening. And then we still have the face-to-face.

MF: When we were talking about WiFi, I remember, again, in the early days of the Internet, when people started bringing their laptops and other devices to the meetings, many hotels at that time did not have WiFi, or it was not included with the registration. And I know you worked hard on that to get that into all of our contracts now.

RN: Right. We put that in the contracts, to be sure. Hotels are not the most technologically advanced organizations. They've got their registration system and they know that well, but as far as outside technology... At most of the meeting hotels—this one, Hilton, Marriott—they all contracted with third parties, and they're usually groups of guys who got together and said, "Well, we'll wire up your hotel and run the operation for you. If we can have the revenue, we'll give you a share."

There was no control over how much they could charge. Like this one in particular, they have a third-party source that was just outrageously expensive—you know, thousands of dollars a day for WiFi for attendees. It was just a ridiculous cost. They were making a lot of money, and the hotel was making a lot of money. And when we complained to the hotel that this was outrageous, they would say, "Well, we don't control how much they charge." They just kind of sidestepped it and said, "Well, you've got to talk to them. We're not involved."

Our sales rep—and the fact that we had the food and beverage and the rooms and everything, it didn't make a difference to the WiFi folks. They didn't get a part of that. They had to make their money from the fees they charged. They don't have groups in the meeting that want WiFi every day, and they have to wire the hotel and keep it current. They have a certain investment they have to recover and then they have to maintain it. If it goes down, it's on them to get it going. So maybe their fees were justified—or not; I just thought they were outrageous.

To protect MLA, we went to including it in the contracts so that you had some measure of control on it and we would know how much it costs when we go into a property. "Well, what are your WiFi fees?" Just like catering. It's like any other services: What do they charge? Who is it? Now, the WiFi people change, so that made it a little bit of a moving target. The people you might have contracted with before, five years later, it's not the same company.

MF: They were bought.

RN: Yes, you've got a new company. Like the guys here, they've changed over a couple times. But the contract with the hotel has to be honored. One way or another, the hotel cannot duff it off, because they were contractually to provide WiFi at a reasonable cost, whatever that might be. And it's routinely, even now, at \$20,000 for the meeting for WiFi. For members, it's that big of a price tag. Fortunately, there's a sponsor who picks up a large part of that cost, so that helps.

MF: Yes, and I know members appreciate it.

RN: Yes. But it's vital now.

MF: It seems to be almost as vital as having the restrooms.

RN: Yes, just about. And WiFi is in all the common areas and all the meeting rooms except for the exhibit hall. The reason it's not in the exhibit hall is because exhibitors buy WiFi for their booth—or a hard line—because a lot of times they want to demonstrate. If we include the exhibitors in the mix of MLA's attendee WiFi, there would be no bandwidth left. Plus, the hotel would lose a valuable source of revenue. They need to buy. If they're doing a demo or anything heavy-duty, they need a dedicated line, a hardwired line.

MF: Right. They didn't want to depend on wireless connectivity, which may or may not be flaky or very slow.

RN: Well, they will, because it will cut down on their costs, and then they'll complain, "Hey, it's not working right." But you just tell them up front that that's part of the contract. It's kind of how it grew up as we expanded WiFi out of the general session room, and we went to the hallways and to all the other meeting spaces. And it's amazing that now, the WiFi providers are adept at really limiting the signal to specific areas, as ordered, and the number of nodes—the numbers of simultaneous connections that can occur.

MF: They don't want any free access going on.

RN: They didn't want it to bleed over into the exhibit hall, though sometimes it does a little bit, but not too much—which is rather amazing. The exhibitors have it built into their budget to buy WiFi, just like they buy other services. That's a little bit about WiFi, and I know you were always interested in it.

MF: Yes, I was always bringing my laptop, and then later an iPad to it, and wanted access to that, because people would come to me and say, "How come we don't have WiFi?"

RN: And then you started wearing the T-shirt that had the WiFi locator on it. So cool.

MF: Yes, I had a T-shirt with a built-in WiFi finder, and a little WiFi signal would light up on my T-shirt in the presence of a WiFi signal.

*[WAV File pt 2]*

MF: This is part two of the MLA Oral History Project interview with Ray Naegele, with Mark Funk interviewing. So, Ray, before we had our lunch break, we were talking about

MLA headquarters in the 1980s and technology, and I think we just wanted to talk some more about that and how it has changed over the years.

RN: One of the things I wanted to mentioned is that in '82 and '83 when I first came to MLA, the finances were very much volunteer-driven, and Minnie Orfanos was the trustee. She was the librarian at Northwestern Dental School Library.

MF: Now, this is a position that we no longer have, right?

RN: It is no longer in place. It was in place for about another five years. She actually signed the checks. We would write the checks, and then I would walk over to the dental library, and she would go through and sign them all.

MF: She was at the...?

RN: The dental library was small; the Northwestern Dental School does not exist anymore. But she would sign all the checks, and then I'd take them back and we would mail them off. That worked. I think it was just a level of comfort by the board, and that's how it was when I got there. They wanted to make sure there were good controls on the expenses, which was fine, but it was time-consuming.

MF: How long did that role last?

RN: It was a couple of years, but eventually, Minnie became more comfortable in letting that activity go away and stay at headquarters, so we set it up so that I could sign it. [Editor's note: Orfanos assumed the role of trustee in 1976 and served until 1987, when the position was eliminated.] We had somebody else write the checks. We had internal controls. That was the other thing: We had to have enough staff in order to have proper internal controls in place. Ray Palmer and I would be signers—

MF: Cosigners.

RN: Yes, two people to sign, and then we had somebody else who wrote the checks. We didn't have any one individual doing all the roles, which is required by good internal controls. That's what most businesses have. But Minnie was very supportive and very helpful as trustee for MLA, and at the annual meetings she would give a report on the finances.

MF: Now, did this evolve into the treasurer's role, or was that separate?

RN: No, it was separate. And for a while, we had treasurer and trustee. There was an overlap for about two or three years, where she would give the [trustee's] report when we had the Finance Committee. Minnie's reports, I think, were very short, but she was on stage and gave a report if she was at the meeting. She talked in general about things, and the treasurer talked about the financial statements, the budget, and how MLA did

financially—kind of like what they do now. Eventually, when Minnie retired, the position went away; it was retired.

She encouraged staff development, which was great. With her encouragement, I went to Dale Carnegie, which was a life-changing experience, because I really didn't think about that at all. She said, "Well, you've got to do this." And then also, [courses on] time management and things. I appreciated that there was someone there promoting some measure of staff development, because it was a budget item that was easy to cut.

Then, the treasurer role and the Finance Committee became the go-to for all things financial from the membership. You asked how we orientated treasurers. Well, it was the one-day orientation, followed by subsequent communications on how things were going, and also preparing the agenda for the upcoming board meeting. That would be informative in providing the background information. I think the treasurer really grew into the role their first year, and then in the second year they pretty much knew what was going on. That's typical for all committees on the board; we followed that process.

The treasurers were a great resource. The one year when we were doing the dues increase, I called all the past treasurers and asked them to support the dues increase, if they would. And they said, "Sure," because they understood more than other members may have understood the need for a dues increase and why it was needed.

MF: So was there a coordinated response from them, or was that word-of-mouth?

RN: It was more informal. I just reached out to them because I wanted to be sure there was an understanding—at least a core understanding—for an increase. They spoke at the annual meeting in favor of supporting the increase.

MF: Yes, during the business meeting.

RN: And that's powerful when you've got a collection of past treasurers saying, support the association financially. That helps. It's members who decide how much the dues are, and the natural knee-jerk reaction is, I don't want to pay for it.

MF: I know another big change—and probably a lot of younger MLA members don't realize that—but up until 1989, each section had its own treasurer who was responsible for collecting their section's dues. They had you send out the renewal notice, they had to gather the checks, they had to deposit the checks, they had to file taxes, I think. And then after their duty was over—and it varied from section to section whether it was one or two years—all that had to be passed on to a new treasurer. Since '89, we've had centralized dues collections from sections as part of the annual [MLA membership] renewal process. I know you had a big role in that, because it obviously concerned money and MLA headquarters. What do you recall of that process, and how has that worked out over the years?

RN: From the board's standpoint, I think June Fulton was really supportive on the Section Council as far as getting together a work group of treasurers—about four of the treasurers from the different sections—who worked with me on working through what system would work well. We settled on the Centralized Accounts Payable System, or the CAPS program. That provided controls by the sections over the funds. And the system we set up, the section treasurer would initiate the check request, or the payment request, and MLA headquarters would function as the accounts payable department. We would not write checks without the treasurer telling us to. We set it up so that, each week, the treasurer gets a report of all the revenues, expenses, and what the bottom line is for the section. And that came out working pretty well. It took the burden off the treasurer of having to switch checking accounts, which is almost impossible on a checking account. These days, with security as it is, it's really hard to switch signers. It really saved them and us a lot of time. That was kind of the driving force.

But a by-product of that, with MLA doing the centralized dues collection, made it very easy for members to pay their MLA dues and their section dues all with one check, which I guess, what I was told was, their accounting departments love that. Instead of getting a bunch of \$5 and \$10 invoices, they can pay one invoice, and it's much better for everyone. What we saw in the data was that the section memberships doubled. We went up to 3,000 section memberships from closer to 1,200 or 1,500, because members just check a box and add it up and go. The convenience factor was big.

That was a major project. And it initially started with about half the sections. It was a voluntary situation. We didn't force the sections to partake in this. It was like, yeah, you want to do this? Here's what we've put in place with the work group. And we built the work group. We created the section business guidelines, and it also talked about the CAPS program, what the benefits were, and there was a sign-up sheet there. We handed it out to everybody. And people returned the sign-up sheet if they wanted it, and it was just a commitment that, yes, our section will do this, and we'll keep doing it in perpetuity until we tell you to stop. It was automatic renewal. If the treasurers were able to get their boards to agree, they signed up. The last section was about four years ago. I think the History of the Health Sciences was the last section to sign up for the CAPS program.

MF: They were holdouts since 1989.

RN: And the reason for it is that they have a small treasury, and it was handled at a local bank, and there was really no issue, and the treasurer didn't change. They were able to go quite [a long time]. But then eventually I think that person retired, and then they needed to join the CAPS program, and they did. So we had 100% participation.

Now MLA has data on all the sections—their revenues, expenses, how they spend their money. I've responded to a number of requests from the board members who are looking at it and have wanted to see how are the sections doing financially and how they're spending their money and so forth so that the board can more effectively plan. Now there's talk with the changeover [editor's note: from sections to caucuses planned for September 2019], because some sections—and not too many have, but some do—have



pretty significant balances that could be—maybe—thought about how it could be more effectively used for the association. But that's to be determined.

The CAPS program, I thought, was just a big success. It was a win-win for staff. We saved a lot of time supporting the movement of checking accounts, which was just a huge time waster. And sections benefited because now they have pretty good data—they have weekly financial reports—and the burden was off the treasurer, so that they could actually do treasurer stuff and do a budget and plan and not be caught up in having to wrestle with the bank to switch signature cards.

MF: When you started at MLA, the association had the printed *MLA News* that included advertising, that produced income for the association. And the *Bulletin*, which then became the *Journal [of the Medical Library Association (JMLA)]*, also had advertising and print subscriptions. So with the move toward online publishing and free, open access, how did you help MLA manage this loss of income? And about how much was that in terms of the budget when we had all of those going?

RN: It was inevitable. And I didn't make this decision—this was done at the board and executive level. The *[Journal]* was going to be electronic and that meant advertising was going to go away. And we were going to give it away—it's open access. You didn't have to be a member of MLA to get the *JMLA*. We lost the subscribers. The trend for subscribers was down once people realized, oh, I can get this for free. That took a few years for that to—I think people had a subscription in their budget; you know, order this, order this. But over time, it has dwindled to where now there are just a handful of subscribers. And I think it might be just about gone at this time.

The advertisers also went away. Advertising for *JMLA* was not as strong as the *News*, so it no longer made money. The flip side of that, though, is that the costs were greatly reduced. Very little printing. We still did print on demand for forty or so people who still wanted a hard copy, and there was an extra fee for that. But there was no postage and no printing, and the costs for doing it electronically were minimal, nonexistent.

MF: So was it almost a wash, then, between the loss of advertising versus the expense of printing it?

RN: It wasn't a wash. MLA did lose revenue. But a lot of that loss was helped by having lower costs, so that offset a large part of that lost revenue. And also, it was inevitable, given who the association is and who the members are, that open access was coming. To do otherwise would have been against some of the principles of the association, so it was something that was of necessity. It was just how it had to be done.

MF: So you were just able to adjust other things to accommodate this loss.

RN: Again, it went to the annual meeting [laughter]. Annual meeting registration fees pop up—an extra \$5 or something—and we raised booth prices. We always considered that MLA offered a terrific audience to the exhibitors, an audience that exhibitors can't

get anywhere else. MLA's meeting was a bargain for them, because they could talk to a thousand decision makers in a short amount of time and it's highly efficient for their sales folks. To make sales calls to a thousand individuals would take a tremendous amount of travel costs and time and not be nearly as effective, as well as even chapter meetings. They just don't get the depth of the membership that MLA [national annual meeting] offers. So it was really cost-effective for them.

The rental fee for the booth was really a small part of the overall cost to exhibit. It was airfare, the salespeople—a lot of people brought staff—the setup of the booth, the Internet—all of those costs were much higher than the \$3,000 or \$3,500 per booth that MLA charged. Well, that was vital to the meeting and other aspects in running the association, but we always viewed it that we want to be at the higher end of charging, because MLA offered good value. And so that's another way...

MF: To make adjustments.

RN: Yes. Paul Graller came up with a great technique.

MF: And Paul is...?

RN: He's the exhibit sales manager for Hall-Erickson, and they were an outside company. We talked about the budget and the need to increase revenue from the meeting, and he said, "Well, how about if we raise—the booth costs a \$100, but the raise won't go into effect until August after the meeting for the next coming meeting." He would make it clear to the exhibitors that if they signed up for their booth early, they would get it at current year's prices. If they waited, it would be higher prices. And that was an effective technique. It was a motivation that helped close the sale. It was a good strategy to have, and people who really were bothered by the \$100 increase just signed up early. We didn't raise every year, but we raised about every other year or so. It also depended on the city where we were at, and what we forecasted for the meeting and attendance.

And we gave exhibitors a lot of time. The welcome reception is in the exhibit hall, and we want exhibitors and members to have an opportunity to interact, because as the surveys show, for the attendees, members find the exhibit hall to be highly educational in staying current with new products and services. The younger members and the retired folks are less interested in the hall—at least I've found on surveys. But the folks who are trying to make decisions for their budget and running their library, it's a pretty important place to be.

MF: It's efficient for them as well as for vendors. I think a lot of MLA members associate you closely with the annual meeting because they see you behind the registration booth greeting people and solving problems. But you had a large role in the planning and organization of the annual meetings as well. What were the financial aspects of the annual meetings that you were primarily responsible for?

RN: Well, don't give me too much credit for the annual meeting. As business manager, one of my roles was registration for the annual meeting, and that included being behind the desk on-site to hand the materials out to members. And I loved that; it was great. Everybody was happy to be there, and I was happy to hand them their badge, as long as it was accurate.

MF: Didn't have to retype it.

RN: Didn't have to retype it. We had a meeting planner that handled the logistics. Well, actually, the National Program Committee—the NPC—handled logistics initially. At that time, it was the Local Arrangements [Committee], because the local folks actually did make arrangements like they do with chapter meetings. Members were exhausted. The meeting is very complex and getting bigger, and it's a huge effort to plan the content and then all the details to support the running of the meeting. Plus, they want to be in the meeting; they don't want to be running it.

So, MLA moved to hiring an outside meeting contact. 1983, the year after I first started, Daniel Newhart was hired. He came from Rotary International in Evanston just up the lake, and he was a professional meeting planner. And what a difference it made in the meeting logistics. It took a huge burden and stress from the NPC chair so that they could focus on meeting content—who the speakers were going to be and what the program was going to be about, and Daniel took care of all the logistics—room sizing, how big of a meeting space, how many chairs, menus, how much food.

MF: So all that before had been done by voluntary members.

RN: To a large extent, yes. I only heard this secondhand because I wasn't here, but I believe it was in Anaheim [1982] when there was a typo in the banquet order for the closing reception. Instead of having food for 1000, it was food for 100.

MF: The Great Food Riot of Anaheim.

RN: It was before my time. That way, members don't have to worry about that. That was Daniel's responsibility to make sure the hotel or the convention center had the right information they needed in order to put together the services. Daniel also was the cousin of Bob Newhart, so you know he's a funny guy.

MF: Good piece of trivia.

RN: Yes, good piece of trivia. But he was a great meeting planner. He was around for about three, four years [1983-1984 meetings], and then we had Estella Smith for a couple of years [1985-1987 meetings], and she was good, very networked. One of the things that I observed, and I think Ray Palmer did, too, is that when you have a dedicated meeting planner, they want to do meetings, and MLA only has one meeting. They're really busy for three or four months leading up to the meeting and a little bit afterwards; otherwise, they don't have enough to do. There aren't any other meetings. They don't

do chapter meetings. There's not downtime, but they're not working at peak performance. It's limiting. If you're a meeting planner, you want to plan meetings. It's what they do. So Estella left after a little while. And the conclusion we came to in observing this—I wouldn't call it a revolving door—is that maybe there's a better model out there for meeting planners. We looked around and looked to outsourcing. Oh, we had one more meeting planner, Daniel Mendelson. He was a meeting planner for a couple years as well [1988-1989 meetings], and then he moved on, and I think he's an executive director here in Chicago for an association. So that was one, two, three—see people stay for a few years and then leave. In 1991, we hired Renee Carey, Professional Planners, and that solved a lot of problems because she had other clients. She would focus on our meeting when it was time—

MF: When that time came around, but she had other clients for the rest of the year.

RN: Right. And that was a good model. The other thing is, being a consultant like that, she sees what's happening in the industry at a higher level, because she's kind of tied in with new ideas and what works with other associations that she can bring to MLA. She brought in moving the welcome reception into the exhibit hall. That was one of her introductions and it worked out fabulously. It's still in place today.

MF: So before that, it was held at a separate place. It was not associated with the opening of the exhibits.

RN: Correct. And the gala opening wasn't quite as gala. That way, it gave more exposure to exhibitors. After having Renee there—she was moving on—and so, in roughly 1998, we brought in Hall-Erickson, and that's Paul Graller. We did an RFP, looked for different meeting planners, and they seemed to be a good match. They had library associations—ALA [American Library Association] and [American Association of] Law Libraries [AALL]—so they really knew the membership, and Law Libraries is about the same size. And ALA has many of the same exhibitors, so there's a lot of crossover. So that was really a boost.

Renee was great at meeting planning, not so great at selling booth space. We felt we should have more vendors at the meeting. That's something that Paul accomplished. His primary goal for him, personally, and his staff was to sell booth space. Then we had Julie Ledogar and a few other staff that he hired who worked on the nuts and bolts of the actual meeting planning. If you think of it two ways, we've got the exhibit hall as one activity unto itself—the selling of the space and the care and feeding of the exhibitors—and that was Paul's responsibility, and then someone that handled all the detailed meeting planning and logistics. And so that did not fall to me, although it's fascinating the amount of detail.

When things were less computerized—there's a three-ring binder, with one page for every single thing that happens at the meeting, no matter how small. They were preprinted forms, and so it had room layout, expected attendance, who the contact people were for it, its purpose, title, food/no food, AV. For every little meeting and every little

session, it had to be detailed out. A copy of that goes to the hotel, and then the hotel knows what they have to do. And it was called a bible. Occasionally, I would get a copy of it. It was great being behind the registration desk and having that data, because there were some things that weren't in the program. There were meeting sessions, or someone would have a private lunch that Renee or Paul might have been asked to set up. The NLM [National Library of Medicine] would have lunches before for their leadership preconference, and that wouldn't be in the program. And then people come to the registration desk and ask, "Hey, where's this meeting?"

MF: And you were able to tell them because you had the bible. Cite chapter and verse.

RN: Yes. So as long as we knew, we could find it. That was a big benefit of being helpful at the registration desk. I appeared in front of a lot of people, but there were a lot of people behind the scenes making sure the meeting was successful.

Another area that really has grown up in sophistication is the [audiovisuals]. You may have seen that—and the stage sets for the meeting. We've gone through a couple of vendors who do AV, and, as the level of technology that they can offer improved, we adopted that. It all comes at a price tag, but we felt we needed to do that in order to continue the professionalism of the show. It's hard to go backwards once you put in place a nice stage set with lighting and so forth.

MF: The IMAG [image magnification].

RN: Yes, the IMAG. One year, we tried, as a cost-cutting thing, to knock off one of the screens, and it just didn't have the same punch; it really lacked something and it didn't look as balanced. So we went back to the dual IMAGs. And oftentimes we have the screen in the middle with rear projection, which costs extra, but that cuts out having that big tower in the center of the room in front, and it just looks more professional. I think our speakers enjoyed it, because it was a real professional setup run by professionals. They could bring in their laptop or thumb drive or whatever it was. They didn't get flustered. That helps the plenary speakers and helps the program. It used to be that MLA would pay about \$40,000 for AV in the budget. Well, when I last looked, it was up to over \$180,000.

MF: And that includes—just so people get an understanding of everything that's in there—

RN: It includes the setup in the general session and all the breakout rooms—the sound and the AV that's in there. The speaker ready room—that we encourage all speakers to go to for their section programs or for the breakout sessions—the AV company takes their presentation and preloads it in the room so that it's there when it's their turn—when they have a panel or there are a group of speakers who are talking and there's a new speaker every seven minutes—those sessions are preloaded. They go smoothly, so they can transition from speaker to speaker to speaker. In the prior days, we would have the speaker load onto a laptop their presentation. It caused all kinds of delays. And we were

trying to stay on schedule because we're trying to do a speaker every seven or eight minutes—whatever the interval was.

MF: Right. And when we have consecutive sessions, people rely on that timing.

RN: Yes. If a ninety-minute session runs overtime, the session that follows it is in kind of a bad position, and they don't like it. I've seen that. Going to the preloading, everyone goes to the speaker ready room, has everything all laid out. The AV company will make sure that it goes smoothly. You just do the clicker, and it goes to the next presentation. I think that works much better.

Also tied in with that is—we have CadmiumCD now. We used to offer, like all associations, cassette tapes of the recordings of the sessions, and then we went to CDs [compact discs]. Then the next step after that was going to online recordings. And so that evolved. We looked around for over a year for the right company that could do the things we were looking for: a better way to handle papers, a better way to package the presentations and provide them to members. We found CadmiumCD and hired them for a three-year stint. And they've done a wonderful job for MLA. Being able to capture all the content online, store it in the cloud, and make it easy to retrieve by members following the same format as the program has. And they've gotten better at it. The first few years were a little rougher. But now it's pretty slick. I think that is a huge advancement for the association, because just the historical value of that. And it gives members who give presentations a chance to see themselves in the self-evaluation. That's what I found: was that was the number one place most speakers went to. If they didn't see anything else, they looked at their own. It's a learning experience. You can see how a presenter came across and how they might improve. When we had the CDs, we did a couple of pricing models. They used to be close to \$200 apiece for a set.

MF: For the whole meeting.

RN: Yes, for the whole meeting. People would object to the high costs, so we didn't sell very many. Also, NLM would buy them and then loan them to whoever wanted them, so there wasn't really a market for them. And then one year we dropped them to \$18 or something for the full set of the meeting, and members were like, "Oh, this is great. Thank you," and we sold a few hundred. And they said, "Well, it solves that whole NLM thing, of having to loan it out and that hassle." That worked for one year, and then the next year our sales—even at \$18, or \$20, were like half of what they were before. So I started asking people, "Why didn't you buy it this year? You bought it last year." And the common answer was, "Well, I bought it, put it on my shelf, and never looked at it." So we knew that no matter what we made the price, it wasn't going to be a product that people were going to use very much.

That's where the online version is just so much easier to access, and you can access it on your mobile phone. You can pretty much see it anytime, anywhere, at any session. So if you want to refer back to last year—someone was talking about a topic last year, and it may not have been relevant last year to you, but this year, now it is because you've got a

project at work or something came up, and you remember the speaker talked about it. You can go back and see the session. I think that's another way it has value. It's out there for everyone who registered for the meeting, so that was another way to make sure everybody had it. The goal was not to make it à la carte. It had to be universal to all attendees. And after a year, all members can see it, so it's on moratorium for a year.

MF: So for the first year, it's only members who attended and registered can see it. After that, it's available for any member.

RN: Exactly, yes. And it's right through MLANET. There are no special passwords or anything that you need. If you access MLANET, you can get to it.

MF: And now we're starting to see, as far as registration, you can attend virtually.

RN: Yes. That was the e-conference option.

MF: Can you talk a little bit about the history of that, how that came about, and how that's working?

RN: The feedback I was hearing from a lot of the members was, "I don't have time; I don't have funding." Those were the two primary obstacles to attending. The best option for that was to reduce the cost to about \$110 or \$100 for a registration fee and provide direct access to the content as it was being developed. Now, there was always a twenty-four-hour lag. For example, the keynote speaker would talk on Sunday morning, and then on Monday morning, the talk would be available. And in my mind, I always thought that might be satisfactory, because Sunday morning, people generally don't want to go and listen to a keynote. But Monday morning, they might, if they're at work or, as some people did, they used the e-conference and had a lunch seminar to see the keynote. They'd call their staff in and they would have a brown bag lunch, and that way they would see it as a group. I think that was the most effective way to see it, rather than in isolation. Now, that way, while you can't ask a speaker questions, you can discuss it among yourselves. There were some library directors who did that, took the time to organize it. And it was very cost-effective.

We had, at the height, about 100 people sign up for the e-conference—a little over 100, 120. It was a way to see the meeting. It wasn't a replacement, but if you really couldn't be there any other way, it was the next best thing to being there. There were also the Twitter feeds and the blog—access to all of that to kind of simulate the feel. We weren't, really, at the stage where we could pipe everything out live and make it a virtual meeting because of the cost, one, and the technology, two. And there's also the lag time on the Internet. If you're doing question-and-answer, it doesn't work unless you've got really big pipes and can take care of that.

MF: That's expensive.

RN: It's beyond MLA's budget. As I said, we spend \$180,000 for AV, and then on top of that, it would have been maybe double to do a live meeting.

MF: What also was included on the e-con? You had the Sunday morning keynote.

RN: Every session.

MF: All the plenary sessions.

RN: Everything.

MF: Even the breakout sessions?

RN: Yes, all the breakout sessions. It's all there. Now, the breakouts, we didn't [video] record them, but we had copies of the slides and would synchronize the slides to the audio. So as the speaker was speaking, the slides were synced. So if you wanted to jump ahead, you just take your mouse and move the bar, and the slides would change and the audio would change. You were always in synchronization with slides. It made it a much nicer experience for the viewers. I thought it was essential, because I've seen the earlier versions, where the slides and the audio are not synced. You always have to know when to advance, and it takes longer to get through it because of that—whereas when they're synced, you can just slide right through, get [past] the parts you don't have any interest in, and just move right along.

The other thing I thought was kind of clever—well, I don't know if it was clever or not—but to compress it, Cadmium sped up the file so the speaker actually talked faster by a little bit. People would say, "Do I really sound like that?" They didn't do that for the plenary sessions, but they did it for the slides because they wanted to help keep them short. I don't know if it really mattered that much, but it did shorten it a little bit.

We had two packages. We had the individual e-conference. That's what I was referring to with the 100 [registrants]. And then we had institutional e-conference, where you could buy a package [where] up to twenty-five individuals could have separate access to the e-conference, and we sold five or six packages of those. Those were about \$500, so you can see how affordable.

MF: Certainly, for an institution, rather than sending five separate people to a meeting, that's very reasonable.

RN: Yes. And I don't think we really lost any attendance; I don't think it cut into attendance. I think it just broadened the audience who would only hear about the meeting secondhand and not see anything of it, or much of it, firsthand. And then perhaps in the following year, they could find a way to attend it.

I think e-conference was pretty successful in what it could achieve, given what it is, as long as people aren't expecting a virtual, live experience where they're there. And some



associations do that, but their fees are much higher and their audience is much bigger. If you've got 100,000 people, you can put on a pretty good live conference. Because the live fee would be pretty closely the same, and to pipe it out to more people, there's an incremental cost increase as you go to larger and larger audiences, just as there is with Zoom or any of the places. They cap out at a certain audience number, and if you want to expand it, you've got to pay more. Same thing with the live feeds.

But I still don't find it satisfactory, and when I looked at other associations that were doing the live, I didn't see it really being—there were clever iterations of it where they would have a little figurine and they'd have a board and try to turn it into a game—you were walking around the exhibit hall or something. And it's clever, but it isn't good enough yet. It's not a game; it's not as good as video games are, and so it doesn't have that immediate interactive feel to it. And then exhibitors aren't there to answer your questions anyway. Unless they're hanging on the live feed, they're not there. So it's a few years away.

MF: Well, we've talked a bit about some of the needs compared to current needs. Anything really behind-the-scenes that has changed that you haven't spoken about yet? I know we talked about the professional planners. Have the hotels really changed? We were talking a bit at lunch about WiFi.

RN: Yes. The need for robust WiFi in all areas where attendees are—inside the hotel, and even outside on the sidewalk, in public areas, is now an absolute requirement for meeting hotels. And the expectation and the need for bandwidth increases, because if people want to see the video from the last meeting, it takes more bandwidth. And so WiFi is essential for the meeting. It's expensive, it's costly. The other thing is, prices are coming down. Some convention centers now are bundling it, and some hotels are bundling it, but they're slow to adopt. But convention centers are increasingly just bundling it in with their rental charges. So it's like the drinking fountain; it's a cost, but you expect it to be there.

MF: Like electricity and restrooms.

RN: Right. Air conditioning. You want those things, so they're getting better with it. And the cost of technology drops as well with equipment costs coming down.

MF: I remember meetings in the late '80s, early '90s, where we had the Internet center. And some of our newer members may not understand what that was. Can you explain what that was, how that was set up, how that worked?

RN: The Internet center was an area in the registration area generally—it's a highly visible area just oftentimes outside or adjacent to the exhibit hall—that had about fifteen PCs at standing desk height. People could go there and check their email or do whatever they needed to do on the Internet, since most people didn't have laptops in those days, but they did have email accounts and they wanted to stay in contact with home or their institution. We would have the PCs set up as a service to members. And there would be

a line of people waiting to use it. I think we had a printer in there so that people could print if they had an email they needed a hard copy of. That went on for a few years until members increasingly had laptops.

MF: And phones. Smartphones.

RN: And smartphones, and could check email on smartphones. They no longer needed to have the Internet center. So we talked before one of the meetings about what we should do with the Internet center, and that was one of the areas that was cut off. We stopped it because the usage had dwindled to almost nothing. That was a big cost savings. It cost a lot of money to put fifteen PCs and link them up to the Internet and have them sitting there. Also, we were decreasing the number. As we looked at the lines and the numbers of people using them, we cut them back to ten machines and then eight machines. The center over the years got smaller and smaller, and then finally we had one or two, and then it just went away. And that was fine, it was great, because now the technology made it very portable and affordable, and so it was a great advance.

That coincided with the increase in CadmiumCD's ability to package the meeting electronically. Even from their side of things, their technology—they were always buying new, faster hardware—they got to the stage where, to do the slide sync, they sent over Internet to somewhere out of the country to someone manually, and then they moved it in-house. They had two people on staff who worked all night to sync all the programming. And they did it. Actually, they learned a lot about the programming. And then they decided, well, we can even do better. We're going to set a camera up in every room, and so in every breakout room, you might see a little tripod with a camera trained on the speaker and also seeing the screen. That way they could get a video of it that they can use. They'd tie that in with the slide sync, so that they'd always have a check of where does this slide come in and what's being talked about, so they could do a better job of doing the slide sync in less time. They don't make the copy of the video available, because it's simply a tool for them to use to do it better, faster. And they did get faster. They can turn those sessions around and slide sync them now.

MF: Nice.

RN: Yes. They're doing well. Now, with 5G, who knows what's possible? They might just do the recordings straightaway. It might get to the point where they don't have to do audio slides; they can just do the video itself. But now we just do the general session room, because it's still pretty costly to do the setup. 5G—something to look forward to, how it will change meetings. And that might be what's needed in order to do true virtual meetings. Everybody's getting a lot more comfortable using Zoom, so that's kind of an introductory exercise to being more comfortable in front of the camera electronically and making friends and staying in contact. The new generation, the younger folks, it's all more natural.

MF: It's second nature. Along with the change in technology—and maybe a little too early [to know]—but do you have any thoughts on how the transition from sections that

we have now to the domain hub communities [groups of caucuses] might affect our annual meetings?

RN: As many may know, sections, for years, did programming, and some sessions were great, others were in need of improvements. The quality was very uneven, and SIGs [Special Interest Groups] didn't have much of an opportunity to present unless they partnered with a section. Sections would band together—we didn't have enough room for every section to have a program. Sections would have to team up to agree on what the topic would be, who the speakers would be, and work together to put together a ninety-minute program. That worked well for many years, but I think it became—at least many members thought it was time, especially Michelle Kraft [MLA president in 2015/16]—and I mention her name because she was an ardent supporter, I think, of it. I don't think she was the first person to come up with it, but I think she saw the value of it, and she was also [earlier] the NPC chair, so she was like, "Let's do this!" And I remember trying to talk her out of it. I said, "Sections are the bedrock of the association," because I had no idea how well it would work.

That was the big transition to what we have now, which is people submit their abstracts, and they're accepted or not. You didn't have to be a member of a section. If you had a good paper, you'd get accepted and you'd get a slot. It was more open. The goal was to improve the quality. And the way it was going to work was, it would be self-selecting. Whatever topics are important to the members is what's going to bubble up, and the reviewers would look at those and, "Oh, this is a good paper," because it speaks to them. It did, it worked much better.

I was quite concerned, but it meant reprogramming everything from Cadmium, where we had the paper [submission] process. Behind the scenes, everything had to change on how we were doing it, because everything was section-based, right down to the reviewers and the communication links with the reviewers and who they would be and what was required. They were in for training, so they understood the system. Sections was more of a routine, because they had a lot of the same people each year doing it, where this new way was brand-new, so everybody was starting from scratch. It was a challenge that first year [for the 2016 meeting] to transition to just the best papers get accepted and the best posters—well, the posters are 90% approved, contingent [approval]. Lightning talks—best lightning talks get accepted. It was more of an open process. And with the successes, new challenges arose, such as people getting seven slots—getting seven papers accepted. That was the high point. It was impossible to schedule them in all the sessions so that they didn't have to be in two places at once.

Another challenge—which is being addressed now—is how do people find what sessions they want to go to. Before, if I was a hospital librarian, I went to the Hospital [Libraries] Section meeting and saw their program. If I was a dental librarian or chiropractic—whatever it is—I had a home; I had meetings where I knew I had to be. And I knew my friends, my colleagues, were going to be there. When we went to this open process, it really wasn't section-based; it wasn't categorized as sections. People were like, well, how do I know where I'm going to run into the people I want to run into and see the

programming I want to see. The first year, it created challenges how to do it, because Cadmium—as powerful as it is with keyword search—it really didn't zero in or answer the question of, how do I build my program with all the hospital library content I want to go to, in the same way that the section would have had it. The packaging was so different now.

And the NPC was challenged—the community content work group. They're the folks who review and then have to take all those individual sessions and build it into a ninety-minute program. They might have six approved papers, but which six am I going to put into that ninety-minute slot, and what do I title it so that it works? That was volunteer-driven—the packaging up of it—and the members worked hours and hours and hours at it, and it was good work. It was a conscious decision not to put labels on. That first year, it was agreed by members: they said “We don't want labels on it. We just want to have the content come, and then we'll group them.”

Subsequently, the committees found it's effective to ask the authors to [specify] target audiences. We have a list of fifteen, twenty categories which are kind of target audiences or interests. Who would the paper appeal to? And I think that went a long way to being able to group papers together so that you had the categories you could rely on as your first step in pulling six papers together to make a ninety-minute session. More work was done for this [2019] meeting by staff. Kate Corcoran did the taxonomy for that. She did it the prior year too. She is hopeful—and I think everyone is hopeful—next year, they will have the authors do more with taxonomy and have more of that in their [abstract]. That whole process, I think, is going well, and it's improving every year; it's getting better.

Prior years, when you submitted a paper, you had to select one—[whether] you want to do a paper, a poster, or a lightning talk. Those were your three choices, and you would rank them. Most people said [paper], and then you could put number two choice, a lightning talk, and then third choice, poster.

The abstracts would go through two-and-a-half rounds of reviews. The first round would be, where are all the papers, how many do we have accepted, and how many papers can we accommodate? How many sessions? There are eight rooms and we can do, let's say, five [papers]. That's forty papers, and [fifteen] minutes a [paper], with a little bit of break time between for Q&A. So that controlled the cap on the maximum number of papers. It was somewhat a curve. You'd go through the first pass and identify which papers had first choice as papers and were accepted—had a high enough score—and was there anything else, like posters or lightning talks—going through another round—that didn't make it, but are they worthy of a poster or a [talk]? It went through a couple rounds.

That had definite weaknesses in that we couldn't give people feedback, because each time, through each pass of the review process, we would have to delete the prior reviews, because we didn't want to have the new reviewers influenced by what the prior reviewers said. The file went away and was just wiped clean, and we went to the next round of

reviews. That left nothing to give people feedback—why their paper was not accepted. That was the most common question.

So, for this meeting, the process was changed to a two-step submission process. The first step was papers and [immersion sessions], I believe. If you wanted [those], you went route one. You submitted it, it was reviewed, and it was accepted or not. The first round was immersion sessions and papers. Those are the two most competitive ones. They were accepted or not, and if not, then you could do a round two—you could take your abstract, change it into a poster abstract or a lightning talk, and then resubmit it, and then maybe it would be accepted in the next round.

What that allowed for is the feedback in both stages. Authors who were not accepted had reviewer comments. They would see, if they opted to, if they wanted to. And reviewers were asked to have constructive comments. I think the last word I heard was that it worked really well, and authors were pleased. They weren't pleased they weren't accepted, but they were glad to get the feedback.

That's just some of the evolution. The Cadmium system has been changed every year since we started really using it. This two-stage process was also a big change in the back operations of it and the programming and what happens. The reviewers did well. The feedback I heard was—the content work group puts out a call for volunteer reviewers and there are about 200 of them.

MF: Oh, that's quite a few.

RN: Yes, it is quite a few, but then, we have hundreds of abstracts that needs to be reviewed, and each person gets about four or five to review so that it's not a great burden. They have the score sheets, and there's a video that teaches them how to score. It's all done online and it's a pretty quick process. You go into Cadmium, call up your abstracts you were assigned, and if you have a person who you know—they're blinded, but if you recognize them—you can recuse yourself, so that's covered, or if it's your own paper or a paper by someone from your institution. That happens from time to time.

The first round reviewers did their reviews and did well, and then the reviewers must have had a positive experience, because they all stayed for the second round of reviews. There was some question of, well, are people going to do a round of reviews in January and then do another round?

MF: Get tired of it and not come back.

RN: But I think people found it maybe empowering. You're seeing things up front before it's even published. You see what other people are doing and you get to identify what you think is the best based on the criteria of the scoring sheet. And the Cadmium and staff and members did their best to make it an easy process for reviewers. We didn't hear anybody come back and say, "Oh, this was so hard to use." No—positive feedback. It was generally, "It only took me a few minutes for me to run through," or "I was done

in an hour.” So that is an ideal kind of a volunteer effort, where a person doesn’t have to leave their office, doesn’t have to leave their home. They can get involved in the association, make a contribution, and it’s a defined beginning and end. It’s not an open-ended project and it’s not a lifetime assignment.

MF: Are there any annual meetings that stand out for you over the many years you’ve been?

RN: They’re like children. They all have their good and bad points. There are a few. Houston stood out because it was my first one. It was in 1983. And it probably stood out largely because they had a cow chip throwing contest. I think Holly Shipp Buchanan won it.

MF: I remember that. It was the big rodeo night.

RN: Yes. That was a very funny event. That was a pretty good meeting. Denver stands out—that was in 1984—because the Brown Palace—the hot water heater broke and the staff was staying at the Brown Palace.

MF: That would be memorable.

RN: That would be memorable. But from a content standpoint, I think it was a fine meeting. Nina Matheson was president, Charles was the NPC chair, and Alison Bunting was [treasurer]—

MF: Charles Sargent.

RN: Bandy. He was the NPC chair. Charlie Sargent was the outgoing president [president in 1981/82] when I first started at MLA. He was not running the board meeting, but he was at the board meeting, my first board meeting in Chicago. It was interesting. He was quite an interesting person. Very old-school, I think.

MF: So you have a printout of the annual meetings? Is that what you’re looking at here?

RN: I am looking at a printout of the annual meetings. I went through the final programs and then pulled out who was president, the location, the theme, and then the NPC, treasurer, and staff just so I can remember, because it goes back a lot of years. New Orleans, I remember that one in 1988, because it seemed particularly challenging, and I’m not sure why, other than I think the hotels were fairly spread out. It had a terrific closing banquet. Percy Humphrey and the Crescent City Joymakers. I don’t know if you remember that.

MF: I remember that, yes.

RN: A pretty good time was had by all. In retrospect, I probably should have put the keynote speaker down, the McGovern speaker. Another huge—and I should mention this

as an interlude to talking about meetings—John P. McGovern was a supporter of MLA, and Ray Palmer worked with Dr. McGovern to endow the John P. McGovern Award Lectureship. That helped tremendously by having a consistent source of funding—predictable source of funding—to offset part of the cost of speakers. We wanted to have nationally known speakers, but nationally known speakers cost money. With his support in creating the endowment, it was possible to have seed money. We usually had, like, \$7,000 or \$8,000 that was from the endowment, and he added more money as time went on. That gave some money to support speakers. Something I had forgotten about was that initially, in [1983], he presented the John P. McGovern Award. [Editor’s note: McGovern presented the first award to the lecturer Lois DeBakey.] He was actually at the meeting and did the presentation. I don’t know if you recall that. He was there, and I saw that in the proceedings. There’s a picture of him on stage presenting the award to the speaker. I think that helped cement his deeper participation in the program, because then he had his foundation start sending checks. So that was all very good.

Boston [1989] was a good meeting. Detroit, 1990—I remember that one as being challenging and interesting. A few things stand out. Fran Groen was the president. Very graceful, very eloquent president. And just down to earth as well. Bob Braude was the NPC chair and Frieda Weise was the treasurer. Well, Bob’s a pretty colorful guy, and he wanted to institute tracks. [Editor’s note: Concurrent workshop tracks on one day of the meeting focused on major areas of concern for health sciences librarians; attendees were encouraged to attend all sessions related to a particular track for maximum educational benefit.]

MF: I was on that NPC.

RN: Were you really? Okay. We had tracks. I heard a lot of members grumbling about the tracks. I thought they were fine, but the feedback was that it wasn’t what they wanted to do. And I don’t know why. A lot of associations have tracks.

MF: The tracks idea was that there would be specific subjects, and it may be management or information services or something. And instead of having more of the sections do the programming, [the NPC was] involved in doing the tracks.

RN: Right. That is actually an early version of what is being put in place now [the taxonomy].

MF: I just realized that right now.

RN: Yes, which [shows] how far ahead you guys were. You were ahead of your time, ahead of the curve. But, yes, people said they were kind of confining, but there were pros and cons. It allowed people to find their place, where they should be during the meeting, based on what they were doing.

The president’s reception—that’s back when we had president’s receptions—we used them as fundraisers, and we had a company that gave money for president’s reception. I

think we ordered food for 500, and about 100 people came. That was at the Pegasus room in Detroit. And it was the best president's reception ever because there was so much food. From a financial standpoint, we could have done better, but for some reason the number of attendees and the food didn't line up. I don't know why that occurred like that. But that was another reason why it stood out to me. It's usually the other way around. I think I know part of the reason why. Our meeting planner, Daniel Mendelson, left right around that time before the meeting, and then I think Kent Mayfield—

MF: The director of education.

RN: Yes—was trying to oversee the meeting planning activities. We were having a vacancy. And I think there was also an emphasis of trying to make the president's reception more appealing. Now we've done away with the president's reception. In fact, it sounds kind of snobbish, and maybe we should have done that back then to make it more egalitarian. But at the time, it was felt that lending the prestige of the president to the event would upgrade it in a way and make it feel to members like it's more important.

MF: Special.

RN: Yes, special. But it wasn't quite perceived as that as much as we had hoped. A lot of it is packaging. Another meeting—Washington, DC, of course. Pam Jajko was the NPC chair.

MF: What year was that?

RN: That was 1992. That was Carla Funk's first meeting [as MLA executive director], and Joan Zenan was treasurer and Dick Lyders was president. I just remember Pam; she was the NPC chair. She didn't have a co-chair. [Editor's note: Elaine Martin was associate chair.] And she was exhausted. We were talking after the meeting or toward the end of the meeting. I think she was thrilled and glad it was over, but she was definitely—

MF: That's a lot for one person.

RN: Yes, it was a lot. And with it being Carla's first meeting, that's when I really got involved in more of the meeting planning, because it was new to her, and I tried to help out as much as I could with what I knew. And then, of course, we had Renee [Carey] at that time, so that helped a great deal.

There are other recent meetings, but I think those are a few of them that kind of stood out—the early meetings. Each one is unique. From my perspective, it was a good meeting if it met the dual goal of getting good reviews on the evaluation—that meant that members enjoyed it and it was programmatically successful—and it met its financial objectives—we met our revenue targets, we kept our expenses where they should be. If you had one without the other, it wasn't good. You needed to achieve both. So that was my measure.



I was at the registration desk; I did a lot. But we always had a professional meeting planner who handled the real nitty-gritty stuff. I negotiated the contracts, did the budget oversight, and prepared the budget with input from the meeting planners, but they were the ones who did the heavy lifting, and I was behind the registration desk getting all the glory, if you want, or not.

MF: Well, that's probably true. I would guess that many of our members are not even aware that there is a professional meeting planner behind the scenes... And that's probably the way they like it. That means things are running well.

RN: Right. They're pretty much invisible unless there's an issue that... If you see them, there might be an issue. You will see them when a room fills up and when a room empties in the general sessions, where they are monitoring it to make sure that everything's going. And then once a session gets rolling, they can go off and do other things or watch the program.

MF: We talked at length about the financial services aspects. Let's talk a little bit about the administrative services part of your title. What is involved with that?

RN: Well, that was keeping headquarters, the physical offices, working—which included the copier, the phones, the postal operations. Early on, postal was the way we communicated with most members most of the time, and so we had a large postal operation. Actually, someone who was a postal operator took all the incoming mail, distributed it to staff—sliced it open and distributed it. At that time, we were also getting all the checks in-house for all the dues renewal and all the registrations when it was registration time. There was a lot of mail that came in, and it needed to be processed. Every day, it was just a river of new mail, and it would all have to be handled pretty quickly, because the next day was bringing in a new flow of mail. And then outgoing mail, of course: we always had a lot of outgoing mail, and at dues billing time, we would have a whole lot of mail.

Speaking of dues billing, one of the things we did when I first got there was, we had members billed quarterly based on their join date. I realized, we're always at some stage of billing people. We never finished throughout the year. We were always either doing first notice, second notice, a third notice. It got really confusing. Membership was only 4,000, 5,000 people, and so that meant we were doing a lot of small batches every month with first notice, second notice, third notice, depending on where we were in the stage. We can't work that way. It works beautifully if you've got an association of 100,000, and it's a way of equalizing the workflow for a staff who are dedicated to processing invoices and doing billing, because then they're busy all the time. On a consistent basis, there are no real spikes. But for MLA, it was just busy work, because we had no one dedicated to it. It was just something where you had to take time out of doing other things and take care of this process and get done, and then a week or two later you'd do it again. We said, what can we do about it? Let's make everybody on an annual basis, put

it on a calendar year basis, and then convert. So we successfully converted all the members to a January-to-December renewal cycle.

MF: What year was that?

RN: It was about [1988]. It was also a precursor to automating—bringing in our in-house computer system. Because the complexities of trying to program the quarterly billing would have been a nightmare versus doing an annual cycle, especially when we were moving it in-house. So, it made it much easier and better to systemize things. We do first notice September, second notice around November, a third notice right around January, and then a fourth or final notice before the March 31st cutoff, when the bylaws say your grace period has expired. That proved the operation is so much better, because now we knew we could do invoicing in large batches. And we didn't have to do it again after March; we didn't have to do it again until [September].

MF: Which freed up most people's time for other things.

RN: For annual meeting registrations—which, again, was cycled, so January-February-March would be busy. April would be super busy because we had the cutoff date—the early bird registration. That's when we got most of the registrations in, right at the early bird registration. Our two people who were inputting got really backed up when it came to the early bird registration. They might be able to maintain and stay up with the registrations on a daily basis, but when there were hundreds coming in, they weren't able to turn them in that fast. That caused a problem with people calling and asking for confirmation letters. It's in the queue. What we did was, after some years of that, and throwing all staff at the problem and trying to keep up—because we drafted other staff members in to do input. We thought about going to an outsource, and that's how we ended up with Convention Data Services, or CDS, out of Massachusetts. They seemed to be cost-effective and had a good reputation. The nice thing is, registrations go to them and they have a team of people who are trained in the registration form—what it looks like and how to input it—and around early bird registration cutoff, they just add more people. They've got a whole roomful of entry operators. We also, with their help, were able to upgrade a great deal the software in the registration process.

I was so happy to see the number of registrations that were done electronically pass the 50% mark. Each year, online registrations were climbing, but now it's well over 50% who do online. It's better for everyone. It's all electronic. The confirmation letter comes back instantly and there's no waiting. I think we're probably up to 70% on people. The ones who aren't are some who work for government institutions where they still have to have paper, or people who want to register five people from the same institution, they want to pay with one check. The best way to do that is to have five paper registrations and a check and put them in one envelope and move that along—because we looked at it from a programming standpoint, and nothing is impossible, but it just kind of defies solution. In trying to put a solution in, it creates a new problem. It really isn't geared to having an umbrella organization and then individuals underneath it. An individual buys a registration, and that's how they're tracked.

[CDS] made registration so much better, and also, it's portable. They have a dedicated Internet connection to Massachusetts so that they can access the databases back in their offices. They're actually in the cloud now at this point. That made it even much better than printing badges on-site. We have no cutoff for registration. It used to be we'd have registration stop a week before the meeting, because we had to physically carry the files with us and we couldn't be processing and freezing the system. Basically, we had to freeze it, and then we could open it up again when we got on-site. But now we don't have to have that freeze, because everything is up-to-date all the time. So a person can register any time leading up to the meeting or on-site, whatever their convenience is. It's better. Everything is in the cloud. And I think there's more room for improvement on registration that is coming. Convention Data Services pretty much specializes in registration, lots of clients, and always looking for ways to improve.

One of the things that I'm happy to see is, the person who used to work at our desk, Dave Wuethrich—I don't know if you remember Dave; he was kind of a tall guy—very helpful. He came to MLA's meetings when he was first starting with Convention Data Services when he was new. He continued to come to MLA meetings and be the manager for his staff even after he was promoted and stopped traveling to other meetings. And he said he did that because he really liked the MLA members... He would still come. He'd still sign up to be manager. Well, the year before last was his last MLA meeting, because he was promoted to chief operating officer at Convention Data Services, so now he's kind of stuck at headquarters. But it was great to see him grow from when he was this tall—

MF: Just a kid.

RN: Yeah, just a kid, to COO. Quite an accomplishment. And it couldn't have happened to a nicer guy. He was always looking for ways—when he was at the desk, he and I would talk about ways to improve the registration process and what could make it better. Sometimes he took the ideas, sometimes not, but he was always interested in making things better. So there's a bit of trivia.

MF: That's fine; I like the true stories. Certainly, a large part of administrative services was the actual office itself, and MLA has been at three different buildings over your career. What was it like to find new office space and then move the entire staff?

RN: I liked it. The move part was tough, but the search process, I found, was always interesting.

MF: So your first building was at—

RN: We were at 919 North Michigan, which was commonly known as the Playboy Building, thirty-second floor. Great views. I think MLA moved in there probably in the '50s or something. I'm probably exaggerating and might have been the '70s. [Editor's note: MLA's first headquarters office was established in 1961, at 919 N. Michigan Ave.,

when the first executive secretary was hired.] The building was tapered; the thirty-second floor was near the top. It was the tallest building in Chicago and had magnificent views of Lake Michigan and Lake Shore Drive. Trouble is, it had enough space for maybe five staff and there were like twelve of us in there, so we were pretty much shoulder to shoulder with things. And when the auditors came, or if we had anybody who came in from the outside—

MF: Somebody had to leave.

RN: Yes, somebody had to leave. We didn't have virtual offices back then. Work-at-home wasn't really much of an option. We would set up portable tables in the hallway—the elevator lobby for the floor. We kind of commandeered the common space. There just wasn't any space.

The nice thing was, the only other tenant on the floor was a woman by the name of Peggy Swift, and she lived up North Shore. Nice lady. And she really liked MLA. Her job was—she wrote a gossip paper about goings-on on the North Shore and in Chicago. She would go to all these social events and then write about them—what was happening. She was just really funny, and she had her typewriter and she would type it all up and get it reproduced. She was an heiress, she was part of the Swift Armour family, so she did this because she loved to do it. But she was very understanding about using the hall. She was a nice lady, and, her paper, I should have kept a copy. It would be what would be on everybody's Facebook page now, things of that nature. So that was our neighbor in the Playboy Building, and we were cramped. We knew it was temporary. The building was turning condo, so we had to go.

In 1988, we did our search. I set the budget at \$12.00 a square foot. That was what we were going to pay for rent—that's annual. There was some discussion, "Oh, you're not going to find anything for \$12.00 a square foot." We looked and looked and looked. And we found a building, 6 North Michigan on the third floor across from what is now Millennium Park, but then there were train tracks down below. North Michigan Avenue was the high-rent district. South Michigan Avenue, at Michigan and Madison [next to] where we moved to, was the low-rent district. Now, back when we moved, I was told, when MLA moved to 919, North Michigan Avenue was the low-rent district. That's where the low rents were. So MLA just goes where rents are the lowest. We moved down Michigan Avenue, down to 6 North. Now that has become the high-rent district, because Millennium Park is finished and so properties have really increased in value.

MF: Very desirable place.

RN: Yes. When we were at 6 North Michigan, it was a Helmsley-Spear building. I don't know if you know Leona Helmsley.

MF: Certainly in New York City, I know her, yes.

RN: She owned—her husband had owned—he passed away—owned about six buildings in the Loop, and 6 North Michigan was one of those buildings. There was no investment in the property at all. Nothing got maintained unless it broke and had to be maintained. There were no capital improvements. Her objective was to flip the building. I never met her, but her property manager was just an ornery person who would do nothing for us. We had a ten-year lease, and it was \$12.00 a square foot. We met our objectives. And it was a fine space, because we had it built out new and it looked right over Lake Michigan; met all our needs. A twenty-four-hour street where staff felt safe going out late at night after work, because we usually worked late, and we wanted bus lines and transportation to be close by. It was affordable, and it was a good part of town. Our ten years [were] up. I tried to renew the lease, but the building manager was rather unpleasant and said something to the effect of, “Who the hell do you think you are?” [laughter] I think he was under a lot of pressure. I said, “Well, I don’t think negotiations are going anywhere.” We went back to the real estate and found 65 E. Wacker Place, which is where MLA is now [at the time of this interview]. That was very affordable.

MF: That was what, 1999 [1998]?

RN: Yes. It was very affordable and it was within our budget, so we moved to the nineteenth floor. It was fully built out to MLA’s specifications. It stood the test of time for a long time, and it has worked well. The area around it definitely has improved from when we moved there. Water Street, you could have a picnic on Water Street. There was no traffic. But now you couldn’t do that at all. The lease is up at the end of next month, and I think MLA will probably move somewhere else, but I’m not sure about that.

The nice thing about the search process—well, the first search process to find 6 North was helped by Jim Shedlock. He connected me. He was on the board and said, “Why don’t you try our broker, the guy who does Northwestern’s searches?” We worked with him, and he was able to navigate us through the process, which was very helpful. And then we hired a different firm for the other search [for E. Wacker Place], but it worked out well, I thought. When we stay that long in a building, I think it speaks well.

MF: Yes, it worked out well for you.

RN: It worked out well and we were able to get long-term leases with low rent. And they’ve maintained the building, and they’ve done a lot of improvements to the building since. The building switched hands. It was owned by an individual who unfortunately fell on hard times when the real estate bust came, and so he lost the building to someone. The ownership is in Ireland. But they keep the building invested and it’s a good asset. And we timed it so that the lease ended after the annual meeting.

MF: Good timing.

RN: Good timing, yes. That’s kind of it on the buildings. We moved around. Not too much in all those years—thirty-six years.

MF: Over your long career at MLA, you've worked with a lot of people at headquarters. Some are gone and some are still there. Can you comment on any individuals who had a particular impact on you or who you really enjoyed working with?

RN: Well, in chronological order, of course, Ray Palmer. He was the executive director [1982-1991].

MF: And that's who hired you.

RN: He hired me. In my view, he started out really strong, and then as time went on, didn't quite have the board's support I think he wanted to have. He wanted to do change—the right change for the profession—but I think the methodology of hiring the outside consultant for strategic planning—and strategic planning and the process, it was very time consuming, it took a lot of association resources, and brought in a lot of input. But trying to distill that input into some coherent plan, as you were getting at before, well, you've got all this input now. How do you manage it and have it into a plan, and is it the right plan? Are you going about it the right way? I'm not sure the association effected as much meaningful change and got as far as he probably would have liked it to go. I know at the end he was getting more and more frustrated and really showing it, I think, with certain members and with staff. It's unfortunate, because when you get to that stage, it's not good for anybody.

He was a person who really taught me the value of packaging. He felt that you needed to package things in a way that's very desirable, that helps, and that's true. It's especially true in personal relationships, as well as in business, and definitely in associations. And then planning and goal setting—he reinforced the whole goal-setting thing.

Kent Mayfield was director of education [and later associate executive director]. Very articulate and a very bright individual. Seemed to know a lot about a lot. He definitely stands out in my mind as well. I had a chance to see him at Rita Schaefer's. She was director of publications [communications]. Lives up Lake Shore Drive. She organized kind of a reunion a few years back. It was great seeing a lot of the old staff, and Kent was there.

He moved to Wisconsin to raise Arabian horses. He was at MLA for [close to] ten years and then decided for a career change. He was the person who told me, "Yeah, every ten years, I like to reinvent myself." That's putting it mildly. But I guess he was quite successful at raising horses. Gave him an opportunity to travel all over the world, where he was able to buy, sell, trade horses, and he had quite a number of them. He was up near Dodgeville, Wisconsin, which at the time was in the middle of nowhere, and then, is it Lands' End—one of the big catalog places—opened a distribution plant there, and the whole town changed. Just huge, tremendous growth. He went out there for peace and quiet and everything. But I was happy to hear that he did well with his horses. When I saw him at Rita's, he was in the process of divesting all his horses and then probably moving closer to a city, because him and his partner were getting older and they wanted to kind of wind down, because there's a lot of work involved in the care and feeding of

horses. And they personally did much of it. That was the last time I heard from him, so I'm not sure where he went after that or if he's still in Dodgeville. He was a person who kind of stood out.

And, of course, Rita Shafer. She was great to work with. As director of publications, she took on a lot of pressure. There was a lot of pressure on the publications area to do more, always.

Those are some of the early staff. Moving on in the time line, we have, of course, Carla Funk [executive director, 1992-2015]. She came on board and was a manager who, I think, leads by supporting the people around her, especially members. I thought her style was very effective at maintaining a cohesive association and a cohesive staff organization. Always found ways to make everyone around her better, oftentimes just by finding little mistakes, which was great, because you didn't want her to find things, so it meant you worked harder.

Other staff that kind of stick out—well, there's Kate Corcoran. She's a workaholic and has been around a long time.

MF: When did she start? Do you remember?

RN: Over twenty years ago? Let's see. She started '88.

MF: Thirty-one years.

RN: Backing up in time, Daniel Newhart, our first meeting planner, the guy was just hilarious. Talk about a free spirit. He was collecting old albums. He had the largest collection of old albums from, like, the '20s and the '30s, and he had it in his apartment. His whole kitchen was full of the old albums. He just loved the sound of them with the scratchy little things going around. Yes, he's quite a character.

As far as my staff go, I had Eli Ventura as an accounting manager. He worked at MLA for about twelve years and was a big help.

Of course, Mary Langman. She's been around a long time. She has always been helpful. She started out as Ray Palmer's assistant and kind of moved into the legislative area and information issues and policy, and I think has really moved that program area forward.

You've got Ruben Calderon. He was our postal operator, but that's just because, next to Bob Braude, he was the best dancer.

*[WAV File pt 3]*

MF: This is part three of the MLA Oral History Project interview with Ray Naegele, with Mark Funk interviewing. Okay, Ray, we talked about memorable individuals at

headquarters. Are there any MLA members over the years that made a particular impression on you?

RN: A whole bunch. The members are what kept me around for thirty-six years, because I think, as a group—if I can generalize—they are honest and hardworking. They're like teachers—underpaid—and a great sense of humor. That's kind of the description I give to speakers when they ask, "Well, what's the audience going to be like?" I say, "Bright and very learned."

There are so many. All the NPC chairs I worked with. Even when I had a stint on the Membership Committee, I enjoyed working with the Membership Committee chairs; and then the treasurers, of course, and the board is great. One of our board members—was it Fran Bischoff?—had to leave the profession, because they said, "I'm going to take a new job up, and I can make three times as much as I do as a medical librarian."

MF: It didn't make any sense.

RN: I'm trying to remember her name—she was really funny and really good. She asked, "You must really hate it when the board comes"—when we were meeting at headquarters. We were at lunch. And I said, "No, this is a chance when we get to eat." They had a nice buffet out there and everything. It was good working with the board, because I think they really have the best intentions for the community and their constituency and health care at large. I really believe that. And I think to single out anybody, it's hard to do that.

I think I've already mentioned a few people. There are a lot of characters. Oh, Frieda Weiss, also a photographer. She lived in Chicago with her husband for a time when she moved here [as health sciences library director at the University of Illinois at Chicago]. At the time she was treasurer. She kind of sticks out in my mind, because she had a thing: "Let's go out." We were going out every month to different restaurants. That was a little bit of a different relationship than I've had with other treasurers. And she gave me a chance to watch her cats. I could not contain them in the kitchen. I built a barrier of suitcases because I had no door on my kitchen—I had to keep them in the kitchen because my fiancée—my wife—was allergic to them. I couldn't allow them to run around the house. Then they wouldn't stay in the kitchen. No matter how high I built the wall, they found a way through it. I told Frieda this, and she goes, "Well, you should have said Ann was allergic to cats. I would have found somebody else to watch them." I said, "No, it's not a big deal. But who taught them to climb?"

Other people—the presidents, generally, have got their act together and bring their own spin on how they want to manage and interact and where they want the association to go. It's a tough question. I can't single [anyone out]—have to mention everybody then.

MF: Fair enough. Our members, librarians, are concerned about the profession, but what do you see as the major challenges for the association in the coming years?



RN: The major challenges for the association—keeping the membership numbers up, continuing to attract new people as users of the services of the association, and staying at the forefront of trends, keeping the members equipped to handle all of the changes now and in the future. Earlier I mentioned 5G. If you can believe the publicity the experts are saying, and it's not overrated, it will have tremendous impact. And I think it has to, because 5G eliminates latency with Internet now, and you'd be able to move any amount of information. That will change the way medicine can be delivered, how doctors or physicians and surgeons interact with patients. It will even free up more time and space, especially space—location.

MF: Distance.

RN: Distance. As I read about it, and you probably hear more of it, being able to do operations remotely and diagnosis remotely through robotics. I don't know what that dynamic is going to do to health care—drive costs down? Raise them? The technology is going to be darned expensive, and it's going to take a while to implement. But all of that is going to require training, it's going to require tests. What's best? And a whole new body of literature [on] robotics, and hopefully there's a little catalog section for that, if there isn't already one. And then personalized medicine is another... It's just exploding with new research and new opportunities to keep people well and healthy.

And so, as the providers and catalogers and maintainers of information, how do you manage, where it continues to increase in size and how it's stored and delivered continues to change? And keeping up with all of that change. I think you've got to love change if you're going to be in the association, because there's just going to be more of it. And if the libraries can be the billboard, if you will, and the institution, or wherever they're at, of, hey, this is the new stuff coming on and this will help you be better at what you do, I think that's a pretty good position to be in as the leader instead of chasing the trends, trying to get out in front of them.

Tough. I don't know how that can be done other than finding a nice balance between being an evangelist for the latest, cutting-edge things, but still being practical and saying, well, this has real practical applications, it's cost-effective, it's really going to have positive outcomes, and we can fit it in the budget. Librarians don't have a lot of budgeting control, but one would hope that you'd have an audience that listens who do have budget control, and librarians can have authority that way, by just being right.

MF: And the association will be there to support them.

RN: I think the association will be there, yes. I think the association brings in the ability for members to talk to members and continue to meet and... There was a cartoon I saw that says, "That's what separates us from the robots [laughter]." It's being able to collaborate, and I think that's where members support members.

Staff aren't experts in the delivery of information, but staff can be experts at finding ways that make it possible for members to collaborate, and I think that's really the staff's role.

Because you all don't want to ask my opinion on what is the best way to design a medical library, because I wouldn't know, but I can tell you a lot about meeting planning or other things, or how to set up the books for an association so that it can stay in business and have a firm financial foundation.

But it's really members working with members, and finding the right ideas, the top ideas, the best ideas, and putting those out for peer review and validation as, yes, this is a wise strategy. And then it can be replicated among all the other members for implementation at their institutions. So that filtering process, I think, is a good role for the association.

Beyond that, I don't know. Change is the big word, and we are not toast yet.

MF: Not yet. Not yet.

RN: And as you know, back in that time there were a lot of threats, but there were also a lot of opportunities. Maybe they weren't very obvious, but eventually they came forward in some way.

MF: And we're still here.

RN: Yes, the world did not come to an end. I think the profession will continue. Also, part of the association is the culture. It's not a culture you see at other organizations too much. And that's a good thing to have, because I think it also binds the membership together. Even when titles change, the attitude and the work ethic and just the whole approach to issues and the open-mindedness all are still there, regardless of what title a person is carrying. That's what I mean by culture, and what I think makes the association a cohesive unit of individuals. And there's a lot of diversity also. Not everyone is in lockstep. There's a tremendous amount of diversity. But I think there is also a lot of cohesiveness among the ideals as well of what members bring and like to see, and a sense of fairness about everything, and evidence-based medicine and the whole bit of using science to justify decisions. Those are things the association membership have and will keep the association relevant going forward. It's their human qualities.

MF: Along with the executive directors, you've been one of the major public faces of MLA for a long time. I think almost everybody in the association knows you. And as we walked downstairs at lunch, it certainly seemed true with a number of people coming up to say hi who hadn't seen you yet at the meeting. How would you like to be remembered by HQ staff and association members now after your retirement?

RN: It may not have always worked out, but I always wanted to do my best to serve the needs of the association. I think that's it. I don't seek or look for credit for anything I do, because I didn't do much; the members or other staff did it all. That's not me; that's not who I am; that's not what I seek. I don't have a big ego. And as one of the earlier association people I worked with said, to be successful in association management, you're better off not having a big ego. You want to allow the others that trait [laughter].

I don't really have a way I want people to remember me by. Each person will remember me by whatever, however, our contacts were. And there were a lot of people on committees, chairs, on projects and so forth, and they'll remember me based on whether they liked the project or not, or the outcome, or whatever.

MF: That makes sense. Thanks. Is there anything else you want to talk about in your career or activities at MLA that we haven't covered today?

RN: Well, we've covered a great deal, I think, but there's so much more we didn't cover. Thirty-six years is hard to compress into a short, four-hour period. It's been a great run. I've enjoyed it. I'm going to miss the association. But I'm smart enough to know I've got to roll on. There's new people coming up who will be effective and will continue on with meeting the needs of the association and its members. So I wish them and the membership well in the future.

MF: Thank you. That's the end of our interview today, and I want to thank Ray Naegele profusely for his time and efforts. I've really enjoyed our time together today, and thank you.

RN: Well, thank you for the patience of listening to me.

## Index

### A

A Top Notch, 7-8,12  
 Accounting, selection as career, 1-2  
 Amdahl, 7,8,21  
 American Association of Law Libraries  
 (AALL), 31  
 American Library Association (ALA),  
 31  
 Association management, 52-53  
 Associations, comparison with other,  
 13,31,35-36,42,44

### B

Baliozian, Kevin, 22  
 Bandy, Charles R., 41  
 Becker, Newton D., 5  
 Becker's CPA Review, 5  
 Bischoff (McNeely), Frances A., 51  
 Biss, Judith L., 14  
 Bradley, Jana, 14  
 Braude, Robert M., 42,50  
 Buchanan, Holly Shipp, 41  
 Bunting, Alison, 41

### C

CadmiumCD, 33-36,37,38-40  
 Calderon, Ruben, 50  
 Carey, Renee, 31,32,43  
 Career decisions, 2,4,6  
 Central States Pension Fund, 2-4,5,6  
 Childhood, 1-2  
 Convention Data Services (CDS), 45-46  
 Corcoran, Kate E., 39,50  
 CPA, 2,4-6  
 Cunningham, Eileen R., 7

### D

Dale Carnegie, 26  
 Data Management Group (DMG), 9-10  
 DeBakey, Lois, 42

Dorfman, Allen, 3

### E

Education, undergraduate, 2  
 Enron Corporation, 21

### F

5G, 37,52  
 Fulton, June H., 27  
 Funk, Carla J., 43,50  
 Funk, Mark E., 20,22,24,42  
 Future of librarianship, 52-53

### G

Graller, Paul, 29,31,32  
 Groen, Frances K., 42

### H

Hall-Erickson, Inc., 29,31  
 Helmsley, Leona, 47-48  
 Helmsley-Spear, 47-48  
 Hoffa, Jimmy, 3-4

### I

International Brotherhood of Teamsters,  
 3

### J

Jajko, Pamela J., 43

### K

Kraft, Michelle, 38

### L

Langman, Mary M., 50  
 Ledogar, Julie, 31

Lyders, Richard A., 43

## M

Majors Scientific Books, Inc., 15

Martin, Elaine R., 43

Matheson, Nina W., 41

Mayfield, M. Kent, 43,49-50

McClure, Lucretia W., 13

McGovern, John P., 41-42

Medical Library Association (MLA)

Accounting, 6-7,27-28. *See also* Cost centers

Administrative services, 7-8,11-12,22,44

Automation, 7-10,21-22,45

Board of Directors, 11,12,13,20,21,22-23,25,26,27,41,49,51

Books program, 12,14,19

Budgeting, 7,13-14

*Bulletin*, 11,12,14,28

CAPS program, 27-28

Challenges, 52

Continuing education, 11,12,14-15,19

Cost centers, 11,12,13

Culture, 51,53

Cunningham fellowship, 7

Dues billing, 7,26-28,44-45

Dues increase, 19-20,26

Exchange, 18-19

Executive directors, 6,22,43,49,50

Finance Committee, 25-26

Financial plan. *See* Cost centers

Financial services, 10-11,25,27-28

Headquarters building leases, 46-48

Headquarters staff, 6,46-47,49-50

Role of, 52-53

History of the Health Sciences

Section, 27

Interest in, 4,6

Investments, 20-21

John P. McGovern Award

Lectureship, 41-42

*Journal*, 28

Membership Committee, 51

*MLA News*, 7,11,12,14,28

National Program Committee (NPC), 16,30,39,42,51

919 N. Michigan Ave. 8,46-47

Presidents, 13,42-43,51

Priorities, 13

Publications, 11,12,14-15,19,28

Revenue, 10-11,12-13,14-15,19,28-29,42

Section Council, 27

Sections

Centralization of dues collection, 26-28

Programming, 38-39,42

Transition to caucuses, 27-28,37-38

6 N. Michigan Ave., 47-48

65 E. Wacker Pl., 48

Strategic planning, 13-14,49

Treasurers, 20-21,25-26,51. *See also* Sections

Trustee, 25-26

Value, 52-53

Medical Library Association annual meetings

Abstract submission, 38-41

Anaheim, 1982, 30

Audiovisuals, 32-33,35,37

Boston, 1989, 42

Chicago, 2019, 16-17,39,53

Denver, 1984, 41

Detroit, 1990, 42-43

E-conference, 33-36,37

Exhibitors, 15,24,28-29,31

Hotel negotiations, 15-18,23-24,36

Houston, 1983, 41,42

Internet, 23-24,36-37

Meeting planners, 29-32,43-44

New Orleans, 1988, 41

Programming, changes in organization of, 38-41,42

Registration, 10,11-12,30,45-46

Revenue, as source of, 14-15,19,28-29,42-43

Seattle, 2012, 16-17

Seattle, 2017, 16-17

Social events, 17,29,30,31,41,42-43  
 Washington, DC, 1992, 43  
 WiFi, 23-24,36  
 Mendelson, Daniel A., 31,43  
 Mueller, Keith, 6-7

**N**

Naegele, Ann, 51  
 National Library of Medicine (NLM),  
 32,33  
 Newhart, Bob, 30  
 Newhart, Daniel, 30,50

**O**

Orfanos, Minnie, 25-26

**P**

Palmer, Raymond A.,  
 6,8,13,25,30,42,49,50  
 Parents, 1  
 Peay, Wayne J., 18  
 Percy Humphrey and the Crescent City  
 Joymakers, 41  
 Pick operating system, 9-10  
 Pick, Richard, 9  
 Professional Planners, Ltd., 31  
 Puehringer, Bertha, 6

**S**

Sargent, Charles W., 41  
 Scarecrow Press, Inc., 14,19  
 Shafer, Rita, 49-50  
 Shedlock, James, 48  
 Smith, Estella L., 30-31  
 Software International, 3-4,6  
 Southern Illinois University (SIU), 2  
 Swift, Peggy, 47

**T**

Tasaka, Glenn, 4

Teamsters. *See* International  
 Brotherhood of Teamsters

**V**

Ventura, Eliezer, 50

**W**

Weise, Frieda O., 42,51  
 WiFi, 22,23-24,36  
 Wuethrich, Dave, 46

**Z**

Zenan, Joan S., 43

# RAYMOND S. NAEGELE, CPA

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Financial leader for mission-driven organization guiding the overall finance and business functions for a sustainable financial structure that places service up-front. Under the direction of the Executive Director, established a dynamic business reporting and budgeting model that maximizes revenue growth and minimizes expenses. Prepared, analyzed, and interpreted financial data for the Board of Directors, association leaders, and managers. Support annual meeting functions.

## KEY SKILLS

- Planning
- Creative Thinking
- Structuring to focus on results
- Time Management
- Delegation
- Accountability
- Communication
- Problem Solving
- Leadership
- Discipline
- Data presentation

## AREAS OF EXPERTISE

- Financial management
- Budgeting
- Accounting
- Fund Raising
- Annual meeting planning
- Administrative services
- Human Resources
- Business services
- Information technology

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## EXPERIENCE

**MEDICAL LIBRARY ASSOCIATION, INC. (MLA) – CHICAGO, IL** (1982 – 2018)

**DIRECTOR OF FINANCIAL AND ADMINISTRATIVE SERVICES** (1985 – 2018)

Promoted to Director of Financial and Administrative Services in 1985, acquired responsibility for financial management, human resources, information systems, membership services, and annual meeting registration. Built a finely tuned accounting and association services team of 5 staff, fostering a collaborative environment that improved productivity, individual accountability, and morale. Other positions held at the association: Interim Executive Director (1991-1992) and Business Manager (1982 -1985)

### Responsibilities and Key Achievements

#### Financial Management

Provided insight for association management with access to timely, accurate and actionable data. Analyzed, interpreted, and reported on the financial status and progress toward achieving projected financial objectives in the budget. Collaborate with the Treasurer and Executive Director to prepare the association's annual business plan and budget for approval by Board of Directors while working with staff to effectively develop and manage department budgets

- Developed a sustainable and dynamic business plan and budget to measure actual financial results with budget forecast through the fiscal year. Adjust operations to achieve targeted year-end financial goals.

- Furthered financial improvement by growing annual operating revenue from \$800K to over \$3M.
- Authored several operating manuals to increase efficiency and consistency. Manuals included:
  - Finance Manual,
  - Section Business Guidelines,
  - Chapter Business Guidelines,
  - Annual Meeting Planning Guide,
  - Local Assistance Committee Planning Guide, and
  - the association's Personnel Handbook for staff.
- Fulfilled financial reporting requirements required by GAAP, the FASB, nonprofit best practice, IRS, Illinois and Maryland Secretary of States, and other governmental agencies the association and its chapters.
- Oversee financial and administrative compliance and reporting for government contracts and private grants.
- Prepared, reviewed and analyzed quarterly reports and year-end projections of revenue and expenditures compared to budget targets in partnership with directors.
- Coordinate year-end audit with the external auditors and internal staff, including the preparation of audit lead schedules, work papers, financial statements and footnotes.
- Assist auditors in preparation of IRS Form 990 and the Annual Year-End Audit Report.
- Represent the association to financial partners, including financial institutions, auditors, investment advisor, insurance agent, etc.

### **Budgeting**

Directed the annual business plan and budgeting process to ensure the association maintains a solid financial foundation to support member programs and services. Present the business plan and budget to the Treasurer and Board of Directors.

- Developed the Financial Planning Model which provides a framework for leaders to evaluate strategies with financial expectations. The Model translates the President's and Board's strategic planning priorities for the coming year into action items in the budget to allocated limited financial and volunteer resources.
- Converted the budget preparation process to Google Sheets to take advantage of its collaborative abilities in order to speed-up the process by 4-weeks.

### **Accounting**

- Established and maintained the organization's system of accounts and assure integrity of books and records for all transactions.
- Oversee reconciliation of bank statements, associated accounts, balance sheet, and maintain internal accounts.
- Oversee all accounting transactions including accounts receivable, accounts payable, cash receipts, general ledger, fixed assets processing, in kind donations and payroll administration.
- Oversee cash flow planning to ensure availability of funds as needed.
- Develop, maintain, monitor and enforce accounting policies and procedures and internal controls in accordance with GAAP and provide trainings as needed.
- Maintain adequate separation of duties within the accounting functions.
- Function as the system administrator for the accounting software.
- Installed QuickBooks Nonprofit Enterprise Edition to support accounting for the association's business functions, e.g., List rentals, advertising, fundraising, events, and CE.



- Upgraded to Right Networks to move the desktop version to the Cloud
- Installed Bill.Com accounts payable application to automate and streamline the payables process and save 20 hours of staff time per week.
- With input from section leaders, developed the Centralized Accounts Payable System (CAPS) to centralize section dues collection and payables for 23 sections. Section members appreciated the convenience of receiving one dues bill. Total section membership jumped 100% from 2,000 to over 4,000.
- Centralized accounts payable System eliminated individual checking accounts thereby saving section treasures hundreds of hours in dealing with the new banking regulations.

### **Fund Raising**

Supported fund raising drives initiated by the Board of Directors, sections, and committees.

- Grew the Association Stabilization (Reserve) Fund from \$50k to 1.4M to provide a solid financial base that the Board of Directors may call upon in the event of financial hardship or opportunity. The fund affords flexibility to examine options and improve decision making
- Worked with association leaders to grow endowment fund balances to 1.4M which support a wide range of awards and professional development opportunities for the profession.
- Planned sponsorship drive with members of the National Program Committee to raise sponsor profiles at the meeting, defray meeting expenses, and enrich the meeting experience for attendees. Annual revenues grew from \$20K to over \$140K when the program was transferred to the association's marketing area.

### **Annual Meeting**

Provided staff support to the National Program (NPC) and Local Assistance Committees (LAC) to plan and achieve the meeting program objectives. Coordinate outside providers for registration services, meeting planning services, and outside contracted services.

- Authored Planning Guides for the NPC and Local Assistance Committee (LAC). The Guides cover the 3-year planning cycle for members of the National Program Committees and Local Assistance Committees which saved them time and allowed them to serve more effectively.
- Coordinated 3-year planning cycle: Preplanning, marketing and registration, onsite management, and post meeting evaluation and debriefing.
- Oversaw rise in meeting revenues from \$500k to 1.6M.
- Launched a cost-effective e-Conference registration model for members who can't travel to the meeting. Registrants access meeting sessions online. (2011)
- Orchestrated online abstract processing system cutting in half the amount of time required to evaluate submissions. The online system streamlined the submission process fueling a jump in the number submission from 140 to 370 and fueled a boost in meeting attendance. (2011)
- Co-authored Planning Guides for the NPC and Local Assistance Committee (LAC). The Guides cover the 3-year planning cycle to shorten the learning curve for volunteers, increase efficiency, and maximize success.
- Streamlined the annual meeting registration process, which attendees consistently rate as "excellent". Improvements include offering attendees prefilled forms to reduce rekeying (name, addresses, email, etc.) and barcoded confirmations to speed onsite check-in.
- Negotiated favorable terms for facilities contracts that saved the association and members over \$1,200,000 in the past 10-years.

- Implemented complimentary Wi-Fi for attendees in plenary room and common areas of the meeting (2011)
- Arranged 12 meeting bloggers to use wireless air cards throughout the meeting.
- Hosted first ever “Tweet Up in the Bar” for about 100 attendees (2011)
- Aligned a team highly qualified professionals to enhance programming and improve services:
  - Meeting Planners, Hall Erickson, Inc for exhibits and logistics. (2000)
  - Outside meeting registration service, Convention Data Services for improved registration process for members and exhibitors. (2000)
  - Decorating service provider GES resulting in predictable expenses savings for the exhibit hall, registration area, and plenary room stage. (2005)
  - Audio Visual services PRG for improved staging and attendee experience. (2010)
  - Integrated abstract submission process, recording service, and scheduling App (2011)
  - Hotel Room Management company, onPeak for enhanced room reservation services for attendees and to maximize utilization of the contracted housing block. (2013)
- Analyzed, forecasted, and negotiated over 50 hotel and facility agreements. For mid-size meetings (1,000+ room block, 180,000+ square feet of meeting space, and 34 break out rooms) are 10meeting space Agreements are signed 5- years in advance of the meeting date to ensure preferred availability
- Replaced the annual meeting attendee evaluation with a new version using Survey Monkey that was easier to complete, doubled the response rate, and reduced expenses by \$3,000 annually.

### **Administrative Services**

Directed administrative and business services. Recommend short and long-range action plans to address profitability and cost-saving opportunities and drive continual improvements for organization's systems, reporting, and internal controls

- Negotiated below-market lease rental rates with favorable terms for Leases from 1982 to 2019:
  - 919 N Michigan Avenue, Suite 3200 1982 to 1988
  - Six N Michigan Avenue Suite 300, 1988 to 1998
  - 65 E Wacker Place, Suite 1900, 1998 to 2019,
- Ensured that the Executive Director and Treasurer are kept fully informed on the condition of the association and important factors influencing it in a timely manner.
- Remained up to date on nonprofit best practices and state/federal law and regulations regarding nonprofit financial and administrative operations.
- Support and coordinate work of the Board of Trustees.
- Researched insurance providers for policies purchased by the association, e.g., (general liability, directors and officers liability, worker compensation, and meeting cancellation. Switched providers which resulted in annual savings of \$20,000. Arranged for general liability and D & O policies to extend to chapters. Chapters paid a nominal below market fee to the association for these coverages. Cost sharing saved chapters about \$10,000 and generated for the association revenue of \$4,000.
- Partnered with 23 section treasurers to implement an online centralized accounts payable system CAPS) for dues billing that cut expenses by 80%, improved reporting, and increased section memberships by 100% to 4,400.
- Designed a pilot to collect Exchange List raw data on computer and re-organize it into a single list alphabetically ordered by journal title. By putting the entire list

onto a single sheet of microfilm, to eliminate printing, cut postage to less than half and deliver it by first-class rather than fourth-class mail. (1985)

- Converted the associations manual accounting and record keeping to computerized systems. Installed the associations first in-house mini-computer from Microdata running the Pick Operating System for membership, meeting registration, accounting, and basic word processing. (1984)
- Provide accounting and financial reporting for ALISE (2010)

### **Human Resources**

- Managed payroll administration, compensation and benefits, recruitment, hiring and departure process. Ensures compliance with federal, state and local laws and regulations regarding employment practices.
- Implemented online payroll and timesheet tracking which provided managers and staff with immediate online access vacation and timesheet attendance records. The online system generated annual savings of \$14,500.
- Maintained annual salary compensation plan to meet IRS requirements and the association's objectives.
- Prepared annual budgets for salaries and benefits.
- Processed bi-weekly payroll.
- Administered the staff retirement program acting as fiduciary for the association's retirement plan and filed annual Form 5500.

### **Information Technology**

Technical skills include:

- QuickBooks
- Excel and Sheets
- Survey Monkey App
- Replicon attendance tracking and reporting App

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## **EXPERIENCE CONTINUED**

### **INTERIM EXECUTIVE DIRECTOR FOR MLA** (1991-1992)

Oversee office operations, programs, technology, products, customer service and human resource functions.

### **BUSINESS MANAGER FOR MLA** (1982-1985)

Manage administrative and business operations, accounting, membership records and services, annual meeting registration, and information systems. Coordinated information systems upgrade to inhouse computer supporting 14 workstations. Transitioned to PC network in sales goals through new business sales, referrals, and retention of account relationships.

### **SOFTWARE INTERNATIONAL – ANDOVER, MA** (1981-1982)

#### **CUSTOMER SERVICE REPRESENTATIVE**

Trained accounting staff at Fortune 500 clients on their conversion to automated accounting applications for general ledger, accounts receivable, and accounts payable. Facilitated sales presentations for new computer applications.

**CENTRAL STATES HEALTH AND WELFARE FUNDS - CHICAGO, IL (1977-1981)**

**MANAGER, ANALYSIS AND REPORTS**

Coordinated general ledger and investment reporting for a \$8B fund.

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**EDUCATION**

**B.B.A. ACCOUNTING**

Southern Illinois University, 1977

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**CERTIFICATIONS**

**CERTIFIED PUBLIC ACCOUNTANT**

ILLINOIS, 1980

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**PROFESSIONAL ORGANIZATIONS**

American Society of Association Executives

Association Forum

Illinois CPA Society,

- Non-profit Committee and the Conference Sub Committee, 2000 to 2017
- Not-for-Profit Conference Task Force 2014, 2015, 2016 and 2017
- Topic Moderator, 2018
- Non-Profit Roundtable Subcommittee, 2001 to 2017, Chair 2014 -15
- Illinois CPA Society Chicago Metro Forum Group (1989 - 2008)
- Membership Committee (1983 – 1987)