**Bert Kaplan – teacher, mentor, colleague, friend, Mensch**

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**Meeting Bert**

In fall 1972, during my first semester in the Department of Health Education, at the UNC School of Public Health, I took a required introductory epidemiology course taught by John Cassel. I had selected the lab on Psychosocial Epidemiology, led by Bert Kaplan. Although I had previously read about mental health, I entered a whole new world. I visited Bert in his office on several occasions – his welcome mat was always out – and he graciously invited me to apply to the Epidemiology doctoral program, offering me a spot on his Psychosocial Epidemiology training grant.

**EPID and TM**

A very nontraditional student, I took two extra years completing my masters degree and deciding whether to seek a PhD. I had learned TM – Transcendental Meditation – in December 1972, and on the first part of the TM teacher training course in 1976, I decided to pursue the PhD in Epidemiology and do epidemiologic research on TM. I told Bert that I was mostly ready to go ahead but that if he were to learn and practice TM, then I would definitely apply.

Now that I have served on the Epidemiology faculty for over 35 years, I marvel that any prospective applicant would say such a thing, which would surely be greeted with loud guffaws. But Bert took my weirdness in stride, learned TM, and persuaded the admissions committee to accept me for the last spot on his training grant over a dozen or so other applicants with more biology coursework and public health experience.

**My academic father**

During the subsequent 40 years I have spent many enjoyable hours with Bert, who began as my academic adviser and professor, became my mentor, colleague, confidant, collaborator, and family friend. My father died when I was 8 years old, and in many ways Bert became my second father. The more I have got to know Bert, the more remarkable he appears. I recorded an interview with him in 2011. It was my first interview ever, and I wish I had done it years earlier and been better prepared. Bert prepared thoroughly for everything he did, so I would have done better to have recorded him interviewing himself!

**Virginia Polytechnic Institute** [not read]

Bert entered Virginia Tech, which was then a military academy, in 1947. He mostly worked his way through college as a waiter in the faculty dining hall and in New York’s Catskill area resorts, serving from 7am to 11pm from June 1st through Labor Day. Since his high school offered only eleven grades, Bert was a year behind in science when he began Virginia Tech. But although neither his high school nor town had a library, he was not behind in humanities because he had borrowed and read nearly every book in the personal library of a Presbyterian minister with whom Bert had become friends.

**U.S. Air Force** [not read]

Because of his excellent grades and demonstrated leadership ability, Bert was one of six “distinguished military graduates” who were offered a regular commission in the Army or the Air Force. I am still trying to figure out how he fit in a masters degree in personnel administration at UNC from 1951-1952 between his graduation from Virginia Tech and his time in the Air Force (1952-1954). He was scheduled to be sent to a forward air base during the Korean War, in which six of his classmates died. But due to “sheer luck”, in the form of an administrative error, he ended up at Cape Canaveral, where he was made Base Adjutant, a position usually held by a colonel.

**Doctoral studies**

After the Air Force, Bert went to the University of Edinburgh in Scotland to study social anthropology. He loved the university, describing it has one of his most significant educational experiences. But his father suffered a heart attack during Bert’s first year in Scotland, so he returned to the States to complete his studies at UNC Chapel Hill. While waiting for the academic year to begin, he worked as a research assistant for John Cassel, the legendary chair of the UNC Department of Epidemiology. He then began the doctoral program in Sociology, receiving a Commonwealth Fund Fellowship and a National Institute of Mental Health Traineeship from Harvey Smith.

**Scholar-teacher**

Bert was a true scholar-teacher, always learning, always sharing. Three years into his doctoral program, he became a preceptor in the Department of Psychiatry in the School of Medicine and the following year an instructor in the Department of Mental Health in the School of Public Health. Upon completing his dissertation he was made assistant professor there. He actually spent much of his time working with people in the nearby Department of Epidemiology, where he had attended John Cassel’s seminars for several years.

**Social Science Research Council Fellowship at Cornell**

With strong encouragement from Robert Wilson, Bert applied for a Social Science Research Council Fellowship, which allowed Bert, Ellen, and Daniel to spend a year at Cornell University in Ithaca, where Bert worked with Alexander Leighton, a giant in the field of psychiatric epidemiology. The year at Cornell was Bert’s second signature educational experience and led to a decade-long collaboration, which included commuting every other week to work with Leighton when he moved to Harvard. While teaching in the Cornell summer school and weighing an offer to join the faculty there, Bert received a call from John Cassel offering him an associate professorship in the UNC Department of Epidemiology. The call was followed by one from UNC Chancellor Carlisle Sitterson urging him to return to Chapel Hill.

**UNC Chapel Hill Department of Epidemiology**

So Bert, Ellen, Daniel, and now, Ron returned to Chapel Hill, where Bert became an Associate Professor in the UNC Department of Epidemiology. He met weekly with John Cassel to learn and discuss. Working with other social scientists in the department, Bert developed the questionnaire for the famous Evans County Cardiovascular and Cerebrovascular Disease study follow-up and built up a program in the epidemiology of mental health and psychosocial epidemiology, including a National Institute of Mental Health-funded training program. Bert taught several seminar courses, including *Culture and Health* and *Behavioral Epidemiology*. Besides his work with the Department’s introductory course in Chapel Hill, he also traveled around the state teaching introductory epidemiology to students in the School’s executive masters program, the pre-Internet version of distance learning. Bert led many independent study courses for individual students or small groups, mentored scores of students, and served on innumerable masters and doctoral committees. Several years ago a group of his students and friends expressed their appreciation by endowing a Thank You Bert and Ellen Kaplan Travel Award for Epidemiology students.

**A Renaissance man**

Bert was a true Renaissance scholar, as widely read as anyone I have encountered. He read so voraciously partly because he could read so quickly. I could show him something on paper – an article, a book, whatever – he would look at it and turn the pages, just as if he were looking at the pictures. But there usually weren’t any pictures, and afterwards he would have comments and questions that demonstrated he had got more out of looking at it in a few minutes than I had in an hour or much more.

Bert was fundamentally a people person. His ability to grasp the key points in written material was matched by his acute insights about people and personality. It was not possible to have a serious conversation with him while walking anywhere around campus, because Bert was constantly greeting and being greeted – it seemed that he knew everyone, and everyone knew him.

**More to come**

Even with all of the above I have only touched on Bert’s extensive contributions, service, and recognitions, which included the UNC General Alumni Association’s 1999 Faculty Service Award and the annual Berton H. Kaplan Lifetime Achievement Award established in his honor by Duke University’s Center for Spirituality, Theology and Health. So I have created a folder for Bert in my “virtual library” on the web (<http://go.unc.edu/sjae>) and will give the last words to Carol Jenkins, long-time director of the Health Sciences Library, where Bert spent many happy hours.

“He saw the best in everyone and told us often of our greatness. He was extremely well read, a true scholar, and made references to scholarly literature as part of his everyday conversations…. He was extremely generous to the HSL for many years….”

And Nancy Colvin, who led our office of student services for many years:

When I think of Bert, the first word that comes to my mind is “respect.”  Oh sure, he had all of those academic qualities – scholarship, intellectual curiosity, creativity.  But in addition, and perhaps more important in the end, he exemplified respect for all – the young, the old; the brilliant, the average; the wealthy, the poor.  No matter the audience, he made the effort to meet people where they were at.  He had a relentless zeal for teaching, a passion that clearly came from the depths of his soul. He brought true integrity to education in particular, and life in general. He will always have a place in my heart.

**And I would add, in many hearts. He was a true Mensch, the embodiment of Love. Our loss is Heaven’s gain.Audio and video recordings at** [**https://sakai.unc.edu/x/anIWTB**](https://sakai.unc.edu/x/anIWTB)

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More notes:

Hugely generous with his time – letting me watch the Watergate hearings and the Ring Cycle when we didn’t own a television; driving my family to and from the airport for vacations

Weekly swimming at the gym and the Farm (the lifeguards put Bert’s name on a chair there)

Literary references constantly, even Winnie the Pooh

Service on Faculty Council, Distinguished Lectures Committee (invited Jimmy Carter), and many, many other UNC and national committees

Endowed John Cassel Seminar, supported Jewish studies at UNC, donated to Health Sciences Library

Spent the night in Ron’s hospital room when he had pneumonia

Repository of wisdom