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Title of Column: ERM Ideas & Innovations

“A lot of Flexibility Within the Structure”: Academic Library Collection Development & E-Resources Management from an Athletics Perspective

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From the Column Editor, Randall Lowe:

I have managed e-resources in the Lewis J. Ort Library at Frostburg State University (Frostburg) for the past 22 years. In addition to being a librarian, I also concurrently served as a cross country and track & field coach at Frostburg from 1998-2010. This ERM Ideas and Innovations column is the result of several years of reflection regarding how my experiences as a distance runner and collegiate coach formed the foundation of my leadership approaches to e-resources management (ERM). As Frostburg's e-resources collection development activities rapidly evolved beginning in the late 1990s, I realized that the skills I developed through athletics were directly applicable to leading the ERM initiatives we were undertaking in the library, especially setting aspirational, yet realistic objectives, paired with the effective execution of individualized strategic plans. In this column, I detail the evolution of Frostburg's collection development, e-resources management, and related faculty outreach efforts over the past decade, the leadership role I have been fortunate to play in them, and how the valuable lessons I learned through athletics have shaped my approach to planning and decision-making.

Column:

The Lewis J. Ort Library at Frostburg State University (Frostburg) began licensing and providing access to web-based electronic resources in 1998, starting with abstracting and indexing databases and incorporating full-text journal article aggregators and reference tools shortly thereafter. In 2007, the Ort Library began a concerted effort to migrate its individual journals from primarily print and microfilm formats to online subscriptions, an effort that would eventually encompass electronic books, streaming video and other types of e-resources. Simultaneously, initiatives were undertaken to better engage University faculty and academic

departments in collection development efforts, as well as to transform staffing and processes to meet increasing e-resources management requirements.

All the above provided the opportunity to apply a renewed perspective to how the library managed its e-resources collections and processes, as well as engagement with stakeholders. As the incumbent with primary responsibility for leading these wide-ranging initiatives, I found that my background in collegiate athletics, both as an athlete and coach, equipped me with a unique mix of skills and practical experiences relevant to meeting these challenges. In this column, I describe some of the approaches I utilized in mentoring collegiate distance runners and how they were applied to developing and executing strategic plans for several e-resources collection development and management initiatives, as well as related faculty outreach efforts, at Frostburg since 2007.

About Frostburg State University and the Author

Frostburg State University is a regional comprehensive public university located in Western Maryland and a constituent member of the University System of Maryland. Frostburg offers 47 undergraduate majors, 14 Master's Degree programs, and a doctoral program in Educational Leadership; 87% of its approximately 5,400 students are undergraduates (Frostburg State University, n.d.). The Lewis J. Ort Library is a member of the University System of Maryland and Affiliated Institutions (USMAI) Library Consortium (University System of Maryland and Affiliated Institutions, 2013).

I joined the Ort Library in 1997 as a reference librarian and subsequently served as Systems and Electronic Resources Librarian before becoming Collection Development, Acquisitions & Serials Librarian, a position I have held since 2007. I have had responsibility for managing the Ort Library's e-resources since I arrived at Frostburg. I have also been an active member of the USMAI's various e-resources management committees and working groups since 1998, including current service as co-chair of its Resource Acquisition & Licensing Subgroup.

I have been a distance runner since 1984, including competing for four years as an undergraduate member of the Shippensburg University Cross Country and Track & Field teams (Shippensburg University Athletics, 2019). In addition to being a librarian, I was also fortunate to serve as a cross country and track & field coach at Frostburg from 1998 through 2010 (Frostburg State University Athletics, 2009), a position that allowed me to both mentor and learn from a distinct group of undergraduate student-athletes, and which also had a significant impact on my development as a department supervisor in the library. My experiences as an athlete and a coach have played a fundamental role in my professional life, equipping me with leadership skills and a well-developed approach to setting objectives, benchmarking, and meeting deadlines that have been successfully applied to both short and long-term project management during my tenure at Frostburg.

An Athletics-Based Approach to Electronic Resources Management

Academic libraries have an established history of collaborating with their institutions' athletics departments in order to provide academic and research support to student-athletes. However, while examples of libraries engaging in outreach and providing academic support to student-

athletes (Caniano, 2015; Davidson & Peyton, 2007; Sapp & Vaughan, 2017), developing specific collections pertaining to athletics (Ames, 2012; Gustafson & Meese, 2016), and even offering exercise equipment in their buildings (Hoppenfeld, Graves, Sewell & Halling, 2019) are fairly common in the literature, I believe that describing how athletics has influenced the professional work of an academic librarian is unique.

Academic librarians assist and collaborate with faculty and students both as individuals and within groups, such as academic departments and class sections. Neither is mutually exclusive when viewed through the lens of library services and collections, and if libraries are to be ultimately successful in providing the most effective combination of e-resources to their constituents, careful cultivation of these multifaceted relationships is critical. This is equally true for the staff members who procure and manage e-resources.

A background in distance running and coaching runners is perfectly suited to address this challenge. The relationship between the individual and the team in cross country and track & field is unique and very similar to what is experienced in the workplace. Each individual runner is completely responsible for the outcome of his or her performance at practices and in races, but these efforts and results contribute directly to the team's success. No one can run your race for you, but the team also cannot be successful without your contributions. I was fortunate as an undergraduate to have mentors that took an approach to developing distance runners that included incorporating feedback from their athletes. Their influence provided a foundation for my own approach to mentoring distance runners, a system that prioritized individualizing a plan for each student-athlete within a larger training strategy. This approach was aptly summarized

by Ron Warhurst, the University of Michigan Head Men's Cross Country Coach from 1974-2010: "There's a lot of structure to my program and to my coaching philosophy, but there's a lot of flexibility within the structure" (Galloway & Lievers, 2004).

This investment-heavy system is also about much more than a physiological approach to training; it involves a commitment to collaborating with student-athletes who possess various talents, life experiences, skill sets, and commitment levels. An individualized approach to working with a distance runner will not be successful without the athlete's commitment to dialogue. Whether working with a distance runner or a library staff member or colleague, listening and paying attention to others not only allows a leader to individualize various approaches to work, but helps to shape objectives and the approaches to achieving them, in part by meeting people where they are and subsequently assisting them in moving forward. It also greatly contributes to individuals buying into team objectives, another critical element in the process.

I found that this individualized approach to training within the team framework was the best way to get the most out of myself as well as the athletes I've mentored. I've successfully applied many of the same concepts in my work in collection development and e-resources management to varying degrees over the past two decades. The remaining sections of this column detail the evolution of the Ort Library's e-resources collections and their management since 2007.

Throughout, I cite how my athletics experiences influenced my approach to project management, as well as the development of faculty relationships and staff roles. Setting objectives and individualizing approaches appear as recurring themes.

Engaging Faculty & Academic Departments in E-Resources Collection Development

By the time I became Collection Development, Acquisitions, and Serials Librarian in 2007, I had coordinated the process by which our e-resource database subscriptions were evaluated and subsequently licensed, procured, renewed and cancelled, for ten years. I was now in a position to expand this approach to include Frostburg's serials and monographs at the same time the library was ready to increase the representation of its journal subscriptions in electronic format.

The Ort Library established two objectives: (1) increasing the representation of e-resources in its collections, and (2) engaging teaching faculty in a meaningful way to ensure that these resources met the curricular and research needs of the University community. It occurred to me that the potential strategic approaches to meet these objectives could follow the same formula I used in working with the distance runners I coached; namely, setting objectives and individualizing plans to engage stakeholders in the process. For example, if a student-athlete stated an objective to win a national title in the 5000-meter run by the time she graduated, we would first discuss if the goal was realistic and, if so, establish intermediate goals or benchmarks to meet along the way to measure progress, create an individualized training and lifestyle plan, and then work to execute that plan to get as close to meeting the objective as possible. Successful execution would require consistency, persistence, and the willingness to make adjustments along with way when setbacks or unexpected circumstances presented themselves.

For the Ort Library's e-resources and related faculty engagement initiatives, I used the following strategic components from my coaching philosophy:

- **Objectives:** (1) Increase the representation of e-resources in the library's collection within the existing materials budget framework. (2) Systematically engage library faculty and teaching faculty to ensure that these resources meet current curricular and research needs.
- **Intermediate Goals/Benchmarks:** Establish distinct projects and events that focus on e-resources for specific collections (e.g. journals, books, etc.). Ensure that the projects engage stakeholders (library faculty and/or teaching faculty) by supplying them with useful information or data and an input/feedback mechanism.
- **Create an Individualized Plan(s):** Engage teaching faculty primarily at the departmental level, supplying library collection information and data that is customized by academic discipline. Engage library faculty by incorporating them into regular assessments and decision-making processes related to electronic (and other) resources.
- **Execute the Plan:** Ensure that library faculty are engaged in collection reviews annually. Ensure that teaching faculty see the results of their participation in projects before moving to the next one. Be consistent, persistent, patient, and assess progress using quantitative data and qualitative feedback to make evidenced-based adjustments along the way.

The following sections describe the specific projects that followed this basic formula.

Migration of Journal Subscriptions to Electronic Format (2007-2018)

Prior to 2007, the Ort Library's investment in e-resources had been solely focused on abstract and index databases, as well as those that aggregated the full text of journal content. At the same time, usage statistics provided by the library's link resolver, SFX, clearly demonstrated that our users preferred having access to our journal subscriptions in electronic format. As a result, the first project designed to meet our objectives was to focus on migrating as many direct journal subscriptions as possible to electronic format.

To engage teaching faculty in this process, a committee was charged to administer a survey in 2008 to gauge the value of the Ort Library's print journals, monographic standing orders, and database subscriptions. Like creating an individualized training plan for a distance runner, faculty in each of 26 academic departments received questions pertaining to library subscriptions that were customized for their academic discipline(s); similarly, library faculty evaluated multidisciplinary subscriptions. A follow-up survey was administered in 2009 to address journal subscriptions in the library's extensive microfilm collection.

Approximately 36% of the University's teaching faculty responded to the surveys, in which we found that less than 50% of our print and microfilm journal subscriptions were meeting current curricular needs, with this figure registering at less than 40% for monographic serials. Faculty also overwhelmingly preferred electronic versions for journal subscriptions, with 79% favoring them over print format and 96% over microfilm.

As a result, a significant number of print journal subscriptions were cancelled, and many new online titles added based on faculty responses to the survey. In addition to making the journal

collection more relevant to curricular and research needs, 20% of the remaining print subscriptions were immediately migrated to electronic format, while several other titles were cancelled due to their coverage in full text databases. By 2018, the Ort Library's scholarly journal collection was almost completely electronic, with only 16 titles remaining in print-only format. Microfilm subscriptions were completely eliminated except for two local newspapers.

Our success in increasing the representation of the Ort Library's collection in online formats – journals in this case – while systematically engaging faculty in the process, led us to the next benchmark project, strengthening the Library Liaison Program.

Revitalizing the Library Liaison Program (2013-Present)

The Ort Library, like many academic libraries, had a long-standing program in place where library faculty liaised with specific academic departments across campus. However, the program devolved over time to the point that its remaining structure centered on assuring that each academic department was simply assigned a library faculty liaison who, in turn, was not provided a clear set of responsibilities to fulfill this role.

Surveying teaching faculty regarding journal subscriptions, as described above, provided an opening for departments to reach out to the library to express their e-resources needs. Notably, this included providing support for new online degree programs in Nursing, as well as meeting with Biology faculty to significantly change the e-resource subscriptions that supported their programs. In addition, the Chemistry and Visual Arts departments contacted the library to

arrange to provide funding from their budgets for SciFinder and Artstor, respectively, e-resources that were not able to be completely funded by the library at the time.

In 2013, we took advantage of these tailwinds to implement the library's first Liaison Program meeting with teaching faculty representatives. Now held annually, this session has focused on the dissemination of information about the program, library services, and collections funding, which has further increased faculty engagement. It has also included a very useful open discussion period, which has contributed to the consideration and subsequent development of new library services and initiatives, such as a faculty publications display in the library and increased accessibility for various collections. This allowed faculty to observe results derived directly from their participation in the program. It has also increased trust and enhanced working relationships between teaching faculty and library faculty.

Establishment of an Academic Department Luncheon Meeting Series (2016-Present)

As the library's working relationship with teaching faculty continued to improve and become increasingly productive, it was abundantly clear that each academic department had very specific library e-resources (and other) needs, often quite different from each other. This has always been true in regard to collecting subject-specific resources, but the evolution and proliferation of many different types of online products underscored that a new approach toward supporting academic departments was becoming necessary, one that moved beyond acquisition formulas and other standardized approaches.

In order for our collection development approaches to evolve to meet faculty and student needs, I again found myself considering the creation of individualized plans to meet our objectives, just as I had done with distance runners. The approach in this case involved creating a series of in-depth luncheon meetings to be held with each academic department. I collaborated with colleagues in 2016 to plan the series, which included preparing reports detailing existing library resources, services, and related usage data customized for each department, as well as providing open-ended discussion questions for teaching faculty to review prior to a luncheon.

The first three luncheons were held in 2017 with the Chemistry, Management, and Nursing departments; meetings with Accounting, History, and Kinesiology & Recreation have followed to date. These sessions have been eye-opening and, in addition to assisting the library in making e-resource and other subscription adjustments, they are informing service and information literacy programmatic changes. The feedback we receive from faculty will also help our collection development approaches evolve to a place where collections and acquisitions related processes and decision-making become more individualized per department rather than standardized for all.

Leveraging the Introduction of New E-Resources: Ebooks (2012) and Streaming Video (2016-2017)

The introduction of new e-resource formats, such as ebooks and streaming video, have not only been simple methods by which to increase the scope and reach of the Ort Library's e-resources collection, but have also served as opportunities to further engage faculty. For example, the library successfully applied to receive University Student Technology Fee funds to purchase

ebooks beginning in 2012; these funds were subsequently allocated to academic departments to purchase titles. This provided an avenue to better introduce ebooks and educate teaching faculty regarding options to incorporate them into their courses. Similarly, a survey was administered to the entire campus community in 2016 in conjunction with a trial to the Kanopy streaming video platform and service. Positive faculty response resulted in the implementation of this e-resource in 2017.

Evolution of E-Resources Management at Frostburg State University – Change, Flexibility, & Library Faculty/Staff Empowerment

While the public-facing components of the Ort Library's objectives to increase the size and scope of its e-resources collection and more fully engage faculty in the process were proceeding, an evolution in e-resources management was simultaneously unfolding for library faculty and staff. From the outset, it was important that the management component of the projects and initiatives described above intentionally received equal attention; a proactive approach to e-resources management would parallel the library's collection development and faculty outreach efforts.

I knew that providing information and instruction to my colleagues and staff would be only part of the equation in meeting the challenges created by e-resources becoming an increasing (and eventually, primary) presence in the Ort Library's collections and services. Just like coaching distance runners, a constructive dialogue with library faculty and my staff would need to be established and maintained that allowed these individuals to actively participate in projects and take ownership of designated e-resources management processes. This dialogue would need to

include regular opportunities for sharing experiences, reflections, and lessons learned, as well as making suggestions for improvement. This approach was something to which my staff, in particular, was not accustomed. However, with persistence and patience, they increasingly came to appreciate the empowerment that accompanied their active participation, a process that I had already seen unfold in working with my athletes.

The following sections provide examples of how library faculty and staff have participated in the evolution of e-resources management at Frostburg over the past decade.

Library Faculty: Annual Subscription Reviews (2009-present)

Engaging library faculty in the process of increasing the presence of e-resources in the Ort Library's collections was equally, if not more, important as reaching out to teaching faculty, especially in terms of achieving buy-in. Library faculty engagement was first addressed by involving them in an annual process to evaluate all the library's journal and database subscriptions and make renewal recommendations (the second method was through a revitalization of the Library Liaison Program, covered below).

Beginning in 2009, this process included collecting and providing a more robust set of usage data to assist with subscription evaluations (see Figure 1 for an example of journal subscription data provided). In subsequent years, data for standing orders and analyses of ebook and streaming video usage that included demand-driven acquisition profile and budgetary scenarios, were developed to assist the library faculty in making informed e-resources collection development decisions. Teaching faculty engagement became increasingly integrated in these annual

evaluations over time as academic departments were contacted regarding infrequently used journal titles as a means to discuss potential alternative subscriptions and other resources.

Title	Price (FY 2019)	Selected Online-only Pricing	Current FSU Subscription Format	Full Text Content Available in Aggregators	Re-shelving Count (Print Only) / Cost per Use (Total Uses) for Online Only
Example Journal 1 (Maryland Shared Journal Project Title)	63.00	75.00	Print	Humanities International Complete (2006-)	Print: FY12 = 1 FY13 = 0 FY14 = 1 FY15 = 0 FY16 = 0 FY17 = 0 FY18 = 0 FY19 = 1 EBSCO Aggregator retrievals: 2012 = 28 2013 = 13 2014 = 5 2015 = 4 2016 = 5 2017 = 11 2018 = 14
Example Journal 2	792.00		Online	JSTOR Language & Literature (1889-, 6-year embargo)	Online: FY10 = n/a FY11 = n/a FY12 = \$11.42 (50) FY13 = \$20.75 (28) FY14 = \$22.07 (27) FY15 = \$22.54 (28) FY16 = \$31.14 (21) FY17 = \$19.14 (36) FY18 = \$25.52 (29) FY19 = \$27.31 (29) Online: JSTOR Aggregator retrievals: 2015 = 37 2016 = 29 2017 = 73 2018 = 40

Figure 1. Example of journal data distributed for annual subscription renewal evaluations.

In 2012, an Annual Collection Development and Liaison Program coordinating meeting was established and held during the summer to make subscription and materials budget decisions for the upcoming academic year. These were informed by the aforementioned data and analysis reports, which were disseminated to the library faculty and the library director at the end of the

previous fiscal year. Each year, library faculty have become more invested and taken ownership of various parts of the process, from suggesting new e-resources, to participating in decision-making, to providing feedback from the teaching faculty with whom they collaborate, largely because – just as effectively working with a distance runner – an individual plan was created for them and subsequently executed.

Library Faculty: A More Structured (Yet Flexible) Library Liaison Program (2013-Present)

Revitalization of the Library Liaison Program, described in detail above, included aspects that intentionally encouraged library faculty buy-in. Librarians were provided with increased structure, such as detailed responsibilities for roles in collection development initiatives, clear procurement deadlines, and the assurance of support from my department in these endeavors. With this foundation in place, library faculty, in turn, were afforded autonomy in working with teaching faculty in the departments to which they liaised to meet the stated objectives of any given project or task. This allowed them to take ownership of their role in various projects, harkening back to the Ron Warhurst cross country coaching quote introduced early in this column: “There’s a lot of structure to my program and to my coaching philosophy, but there’s a lot of flexibility within the structure” (Galloway & Lievers, 2004). As a result, the library faculty became more invested in the Liaison Program, and through their creativity and industriousness, the program continued to improve, eventually being cited as a best practice for inter-campus communication by leaders of the University’s Faculty Senate.

Library Staff: Instruction to Inclusion to Ownership of E-Resources Management Processes (2007-Present)

My staff consisted of four members in 2007. The continued transformation of the Ort Library's collection to one that was largely electronic had a considerable impact on the operations of the Acquisitions and Periodicals units, and I invested significant time and effort into evaluating and developing procedures and routines to improve e-resources workflow. This included informing staff members that changes to our collections and procedures would be forthcoming and explaining why these would be occurring. It also incorporated education (e.g. an ebooks primer developed in 2014 introducing different acquisitions models) and training (e.g. instruction in link resolver administration and usage data collection).

An initial set of procedures for accomplishing newly established e-resources management tasks usually accompanied each training session, which were then turned over to staff members to modify and improve based on their experiences in conducting the actual work. This not only gave individuals the opportunity to take ownership of their various roles in e-resources management (ERM), but had the effect of staff gaining expertise and developing a deeper understanding of ERM concepts. Participation in developing procedures led to a feeling of empowerment throughout the unit, resulting in an increased number of well-informed suggestions for improving the Ort Library's ERM operations originating from staff members. The procedural documentation that was developed by staff cumulated in the publication of an extensive procedures manual for the department.

It would be disingenuous to suggest that all four staff members accepted and embraced these tasks equally. In fact, I maintained responsibility for several ERM tasks that I had planned for staff to assume until two long-term employees retired. Their acceptance of e-resources as the

dominant format in the library's collection was much slower to develop than that of the other staff members. As with the distance runners I coached, maintaining an ongoing dialogue with staff allowed me to meet them where they were at any given time, empowering them when they were ready. I instituted regular individual and staff meetings to facilitate this process, just as I did with my athletes and teams.

As of this writing, ERM staff are very engaged in improving the procedures and processes pertaining to their work, are encouraged to serve on committees related to e-resources collection development, and are actively involved in gathering data for an upcoming implementation of the Ort Library's first electronic resources management system. These staff will play an active role in developing the ERM procedures related to this system from the ground up.

Conclusion

The Ort Library's objective to increase the representation of e-resources in its collections has been largely achieved, as evidenced by the fact that over 80 percent of the materials budget is now designated for this purpose. It is incumbent upon us to continue to maintain and expand upon the relationships we have developed with teaching faculty to ensure that these e-resources maintain their relevance to the University's curricular and research needs. While we have made great strides in reaching out and advancing our working relationship with teaching faculty, we still have inconsistencies to address to ensure that the communication link between this constituency, and our students, is strengthened.

We will continue to keep our eye on our established objectives, set intermediate goals, and create individualized plans to meet them. Our luncheon meeting series with academic departments will continue so that both common themes and opportunities for individualized approaches can be identified, resulting in improved library services and collections. In addition, we have recently held student and faculty focus groups and are strategically engaging faculty in assessing student information literacy skills, building on the outreach efforts described in this column.

In regard to e-resources management, we have also learned that you don't need to be a card-carrying librarian to oversee many aspects of these processes. My staff have not only taken on increasing amounts of responsibility for ERM tasks over the years, but also ownership in developing procedures; they will continue to do so as we implement our first e-resources management system. Student employees will also begin to pick up routine ERM tasks. The efforts of these individuals will allow me to focus more time on continuing to increase our outreach to teaching faculty as well as assessing the use and value of our e-resources.

As with coaching endurance athletes, successful development unfolds over an extended period of time and the journey is not linear. The success of many of the library initiatives described in this column have provided affirmation that the approaches I took as a coach in mentoring distance runners can be meaningfully applied to my work as a librarian managing e-resources.

Maintaining "flexibility within the structure" remains a key so that we can learn from our successes and failures and adjust plans, as needed. We still have a long journey ahead of us to fully meet the objectives stated in this column, let alone meeting others that will undoubtedly be

developed. I am confident that setting aspirational, yet realistic objectives, paired with the execution of individualized strategic plans, will continue to serve us well in the “long run.”

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