ORCID Member Town Hall Meeting

Europe, Middle East, And Africa

April 2, 2020

ORCID | Connecting Research and Researchers

ORCID.org

ORCID'S VISION IS A WORLD WHERE ALL WHO PARTICIPATE IN RESEARCH, SCHOLARSHIP, AND INNOVATION ARE UNIQUELY IDENTIFIED AND CONNECTED TO THEIR CONTRIBUTIONS AND AFFILIATIONS ACROSS TIME, DISCIPLINES, AND BORDERS.

Agenda

Welcome and Introduction to ORCID Board - Linda O'Brien, Board Chair

Introduction to ORCID Staff - Laure Haak, Exec. Director

Review of 2019 Activities - Laure Haak

Review of 2019 Financials - Sarah Hershberger, Director of Operations, Ivo Wijnbergen, Director of Engagement, and Daniel Hook, Treasurer

2025 Vision - Laure Haak

Regional Update - Gabriela Mejias, EMEA Engagement Team Manager

ORCID Board Nominations and Elections Process - Ed Pentz, Nomination Committee Chair

ORCID Board 2020

- Linda O'Brien, *Chair* (2020 - 22, 2nd term) Griffith University (AU)
- Julie Balter Secretary (ex officio), ORCID (US)
- Laurel L. Haak (ex officio) ORCID (US)
- Yuko Harayama (2020 - 22) Researcher member (JP)
- Daniel Hook (2020 - 22, 2nd term) Digital Science (UK)
- Richard Ikeda (2019 - 21, 2nd term) National Institutes of Health (US)
- Veronique Kiermer (2019 - 21, 2nd term) PLOS (US)
- Robert Kiley (2019 - 21, 2nd term) Wellcome Trust (UK)
- Salvatore Mele (2018 - 20, 2nd term) CERN (CH)
- Alison Mitchell (2018 - 20) Springer Nature (UK)

- Ed Pentz (2018 - 20, 2nd term) Crossref (UK)
- Andrew Preston (2020 - 22) Clarivate Analytics (UK)
- Katharina Ruckstuhl (2020 - 22) Royal Society Te Apārangi (NZ)
- Daisy Selematsela (2018 - 20) UNISA (ZA)
- Simeon Warner (2018 - 20, 2nd term) Cornell University (US)
- Karin Wulf (2018 - 20) Researcher member (US)
- Shouguang Xie (2019 - 21) Social Sciences Academic Press (China)

Executive

Laure Haak
Executive Director

Julie Balter
Executive Assistant

Operations

Sarah Hershberger
Director, Operations

Emilia Kutrovska
Project Manager

Padma Gopinath
Accountant

Stephanie Harley
Events Coordinator

HR Manager

Engagement

Ivo Wijnbergen
Director, Engagement
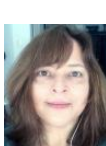
Estelle Cheng
APAC Manager

Camillia Lu
APAC Lead

Brian Minihan
APAC Lead

Shawna Sadler
Americas Manager

Ana Paty Cardoso
Americas Lead

Ana Heredia
Americas Lead

Gabriela Mejias
EMEA Manager

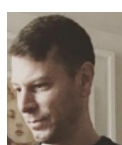**Nabil Ksibi**
EMEA Lead

Paloma
Marin-Arraiza
EMEA Lead

Product

Tom Demeranville
Director, Product

Paula Demain
Product Mgr

Dan Dineen
UX Specialist

Communications

Julie Petro
Director, Comms

Bernette Sherman
Writer

Rob Blackburn
Web Producer

Katrina Willis
Comms Specialist

ORCiD

orcid.org/team

37 people
16 countries
15 languages

Technology

Will Simpson
Director, Technology

Liz Krznarich
Tech Lead, New Projects

Tech - Registry Services

Angel Montenegro
Tech Lead, Registry

George Nash
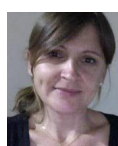Sr. Software Developer

Leo Mendoza
Front End Developer

Daniel Palafox
Full Stack Engineer

Giles Westwood
Devops Engineer

Camelia Dumitru
Back-End Engineer

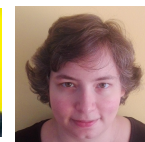**Tech - Researcher Services**

Cat Wilmers
Lead, Researcher Services

Pedro Costa
QA and API User Support

Timothy Ho
User Support Specialist

Mitra Najafi-Gheidari
Senior User Support Specialist

Andrej Romanov
User Support Specialist

Active and Growing Base of Users and Members

iD

1.9m New registered users in 2019

5,400 New iDs created every day by researchers

3.2m Records connected to another identifier (40%)

27.5k Records with at least one trusted individual

ORCiD

7.7m Registrants

129m API calls in a month

1013 members in **45** countries

21 National consortia

Active Member Community

661 TOTAL INTEGRATIONS
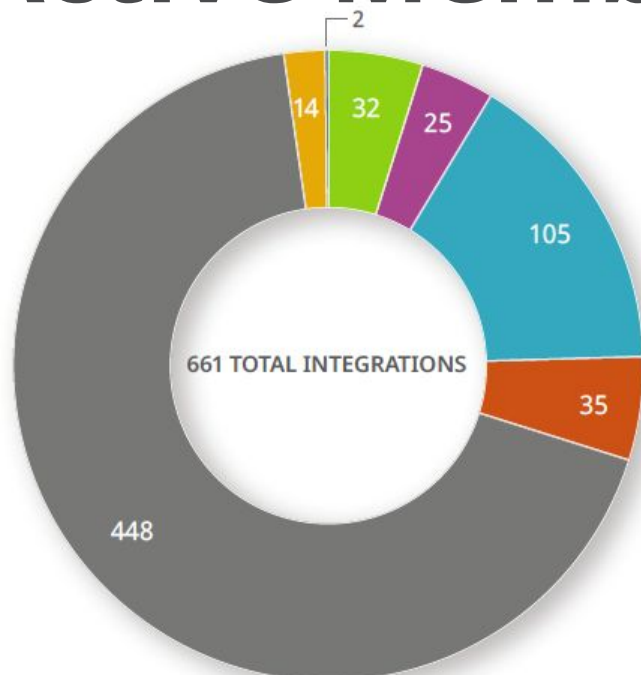
MEMBER INTEGRATIONS BY SECTOR

- Research Institute: **448 (68%)**
- Publisher: **105 (16%)**
- Repository/Profile System: **35 (5%)**
- Other: **2 (<1%)**
- Association: **32 (5%)**
- Funder: **25 (4%)**
- Government: **14 (2%)**
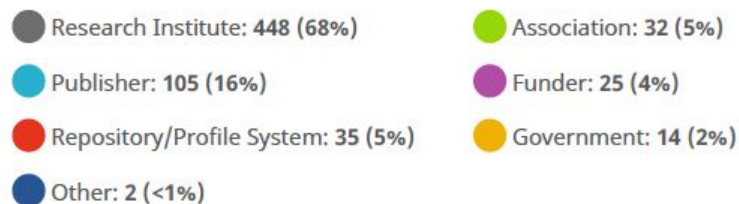
By the end of 2019, **49,252,213** **work items** had been connected to ORCID records — an increase of **34%** over 2018.
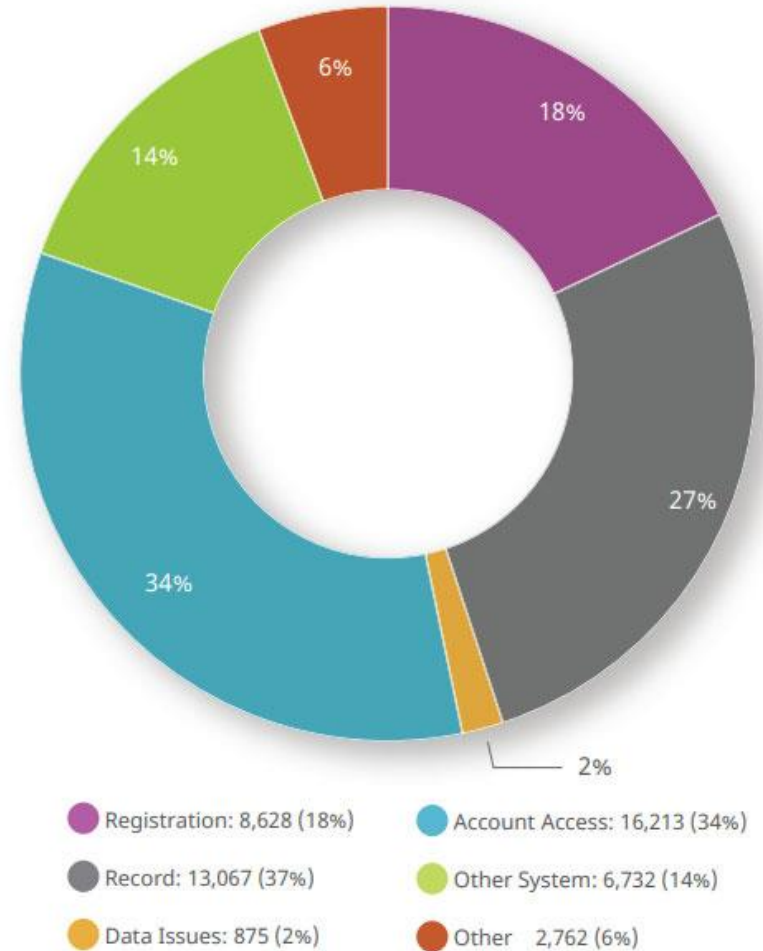
Of these records, **32,982,354** were added through **member API integrations** — an increase of **40%** over 2018.

Ensuring Ease of Use

In 2019 we created a dedicated Researcher Services team. We focused on user query response time and user experience.

- We implemented a new tool to manage user service alerts and eliminated spikes in ticket numbers
- Beginning to see decrease in response time since new tool implemented
- We collected information on the major classes of user questions and prioritized UX improvements

Legend:
- Registration: 8,628 (18%)
- Record: 13,067 (37%)
- Data Issues: 875 (2%)
- Account Access: 16,213 (34%)
- Other System: 6,732 (14%)
- Other 2,762 (6%)

Improving our Product

In 2019, we improved the ways researchers can manage their record, including grouping and DOI lookups.

We released API 3.0 that expanded record affiliation types to include invited positions and distinctions, membership and service, and also supports acknowledgement of research resources.

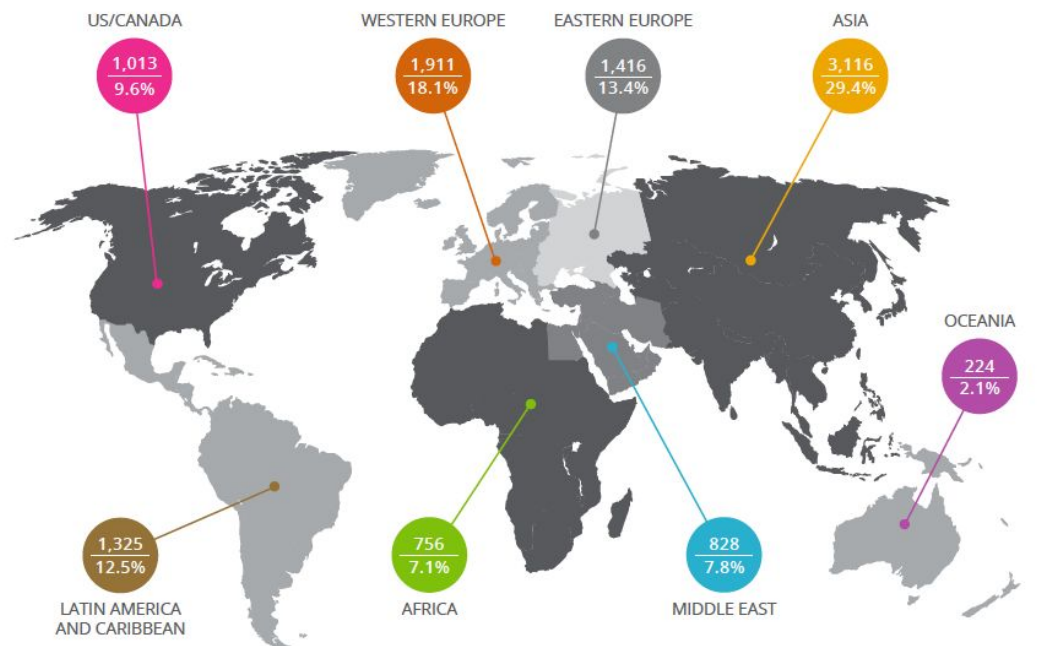Nearly **700K of these new affiliation types** were added to ORCID records in 2019.

Understanding our Communities

2019 Community Survey
11,201 respondents

84% agree that requiring ORCID iDs is beneficial to the global research community.

ORCID is no longer viewed as a "**New**" organization; instead, "**Widely used**," "**Global**," "**Open**," "**Efficient**," and "**Easy to work with**."

US/CANADA
1,013
9.6%

WESTERN EUROPE
1,911
18.1%

EASTERN EUROPE
1,416
13.4%

ASIA
3,116
29.4%

OCEANIA
224
2.1%

LATIN AMERICA AND CARIBBEAN
1,325
12.5%

AFRICA
756
7.1%

MIDDLE EAST
828
7.8%

ORCID Events

Workshops: We hosted 17 events with over 800 participants **Webinars**: We hosted 18 events with 1215 attendees

Working Groups: We hosted 6 working groups and task forces

Conferences: We attended < 90 events across sectors and regions

Twitter: We grew our follower base by 25% to 31.5K

Becoming Sustainable

Since our founding, a key milestone for ORCID has been reaching financial sustainability. For us, that means being fully supported by membership fees. We hit that breakeven point and ended 2019 in a strong cash position.

- **Actual vs. budgeted expenses.** We tracked at or under budgeted expenses throughout 2019.

- **Earned revenue.** We had YOY growth of 14% in our accrued membership revenue and maintained membership retention at greater than 95%. We have a healthy annual recurring revenue of $4.25M at 2019 EOY.

- **Trajectory to break-even.** At 2019 EOY, we reached break-even, the first fiscal year in which our total revenue exceeded our operating expenses.

- **Cash management.** Cash on hand on 31 December was $3.4M, well over our 3-month operational requirement. We automated A/R and have significantly improved the timing in which we receive member payments.

Achieving our Mission

Our work is centered on our four core strategies:

RESEARCHERS. Position the researcher at the center of all that we do

TRUSTED ASSERTIONS. Enable a wide range of verified iD-ID connections

INFRASTRUCTURE. Invest in developing a robust information infrastructure

STRATEGIC RELATIONSHIPS. Develop sustainability through strategic relationships.

ORCID launched its Registry service in October, 2012. Now, with over 1100 members and 600 systems around the world that use the ORCID API to collect ORCID iDs, ORCID has grown to become an integral part of the global research infrastructure. Persistence – both in terms of *patience* and *prolonged existence* – is critical, especially in these times of uncertainty and change. Over the last 8 months, we have taken a deep look at our core strategies and developed a 2025 vision focused on reliability and resiliency.

Our 2025 Vision

As we look to the future, these questions emerge from our core strategies:

➢ Will <u>researchers be able to use ORCID</u> to enhance their ability to undertake, communicate, evaluate, and promote their research and in a variety of settings as they are doing their work?
➢ Will we be providing <u>high quality data</u> in a way that researchers and their organizations value?
➢ Will we be able to increase adoption and <u>scale our operations</u> effectively and efficiently?
➢ Will our partners and members <u>gain value from adopting</u> ORCID?

Our 2025 vision is a 5-year framework by which to organize and prioritize our activities and measure and communicate our progress. Each core strategy is aligned with specific goals, each of which is supported by our activities and measured using key performance indicators.

EMEA Engagement Team

Gabriela Mejias
Engagement Team
Manager, EMEA

Paloma Marin-Arraiza
Engagement Lead
Europe

Nabil Ksibi
Engagement Lead,
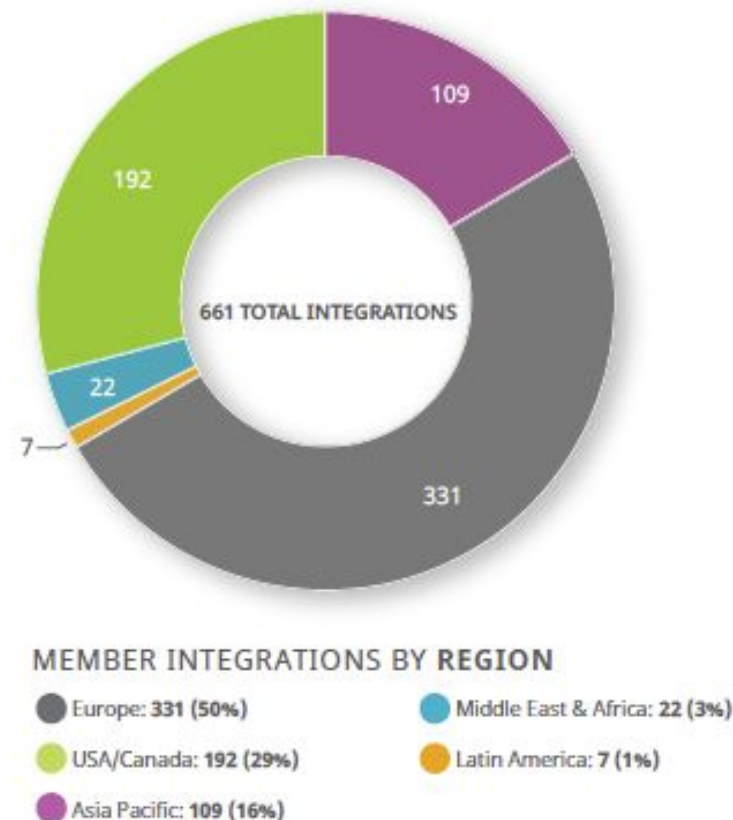Middle East, and Africa

EUROPE

MIDDLE EAST

AFRICA

Languages: Arabic, Catalan, English, French, German, Portuguese, Spanish

ORCID in Europe, Middle East, and Africa

15 consortia: Austria, Belgium,Denmark, France, Finland, Germany, Ireland, Israel, Italy, Netherlands, Norway, Portugal, South Africa, UK, Sweden. In 2019 we have onboarded 4 national consortia

Active Members: Europe, Middle East, and Africa represents 58% of our membership base and 53% of our total member integrations. In 2019 we have onboarded 152 new members, and 60 new member integrations were launched, including 1 new S&L wizard. We have co-hosted 11 regional workshops.

Active Users: There was a 169% increase (7,041,428) in unique registry users in Europe, Middle East, and Africa in 2019

661 TOTAL INTEGRATIONS

109

192

22

7

331

MEMBER INTEGRATIONS BY REGION

- Europe: **331** (50%)
- USA/Canada: **192** (29%)
- Asia Pacific: **109** (16%)
- Middle East & Africa: **22** (3%)
- Latin America: **7** (1%)

15

2020 ORCID Board Elections

We are seeking Board Directors from every region and sector to take an active role in our governance and strategy as we transition into sustainability and persistence.

The elections process is overseen by the Nominations Committee, chaired by ORCID Board member Ed Pentz.

Look for our blog post and newsletter later in April for more information.

Being a Director

- Directors serve for a three-year term, with meetings three times per year and
  - Oversee organizational and financial performance
  - Develop and regularly update the strategic plan
  - Review high-level organizational goals
  - Serve on Board committees
  - Use their experience and skills to help ORCID achieve its mission
- For more information see https://orcid.org/about/what-is-orcid/governance

The Election Process

- You may nominate yourself or a colleague. Follow our [blog](#) for more information about **nominations.**

- The Nominations Committee will assess all nominations received by **1 August 2020** and develop a balanced slate, maintaining majority non-profit Board membership

- Member voting will take place from **29 October 2020** and the results announced on **30 November 2020**

- New Directors will start their terms on **1 January 2021** and the first Board meeting is **9-10 February 2021**

Thank You for Your Support!

Please use the webinar chat box to ask questions or share comments

Contact Information

- **ORCID Executive Director**: l.haak@orcid.org

- **ORCID EMEA Engagement Manager**: g.mejias@orcid.org

- **General questions:** community@orcid.org or contact your consortia lead organization

- **User questions:** https://support.orcid.org/hc/en-us/requests/new