



ORCID Member Town Hall Meeting **Americas**

April 1, 2020

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 - Daniel Hook, Treasurer

2025 Vision - Laure Haak

Regional Update - Shawna Sadler, Americas 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 Hersherberger
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



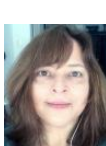
Brian Minihan
APAC
Lead



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

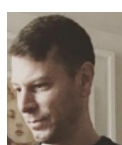
Product



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



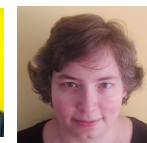
Cat Wilmers
Lead,
Researcher
Services



Pedro Costa
QA and
API User
Support



Timothy Ho
User
Support
Specialist

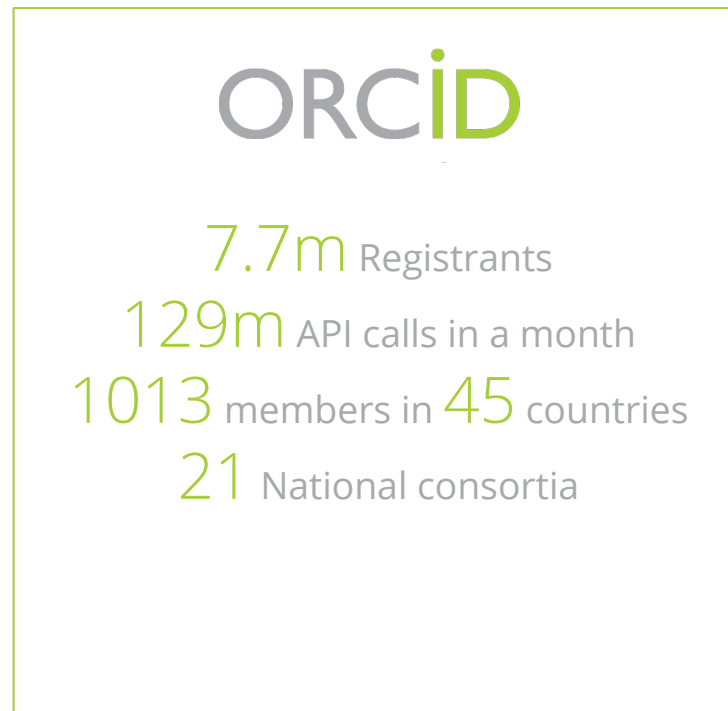


Mitra Najafi-Gheidari
Senior User
Support
Specialist

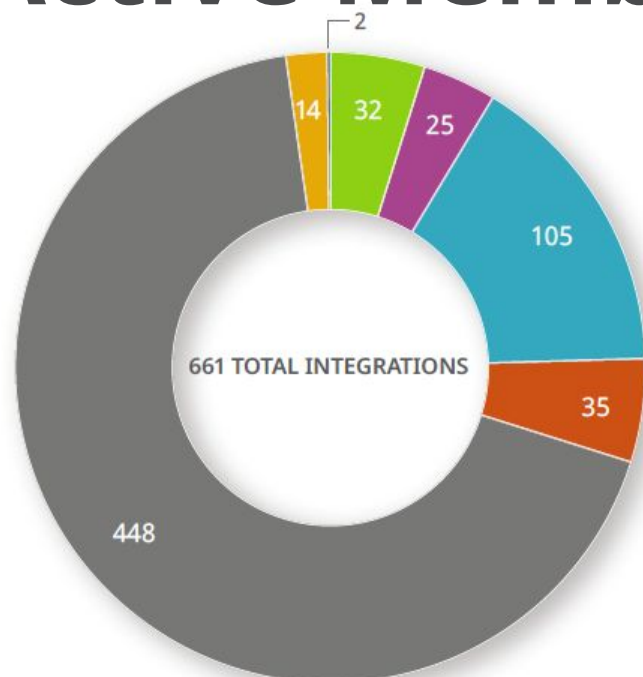


Andrej Romanov
User
Support
Specialist

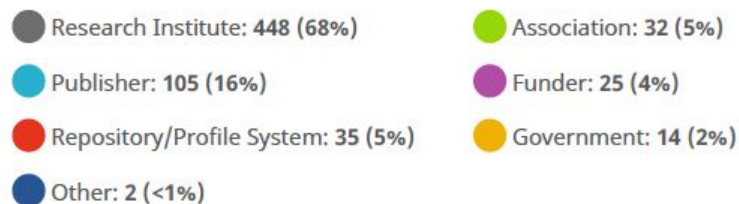
Active and Growing Base of Users and Members



Active Member Community



MEMBER INTEGRATIONS BY SECTOR



By the end of 2019, **49,252,213**

work items had been connected to ORCID records
— an increase of **34%** over 2018.

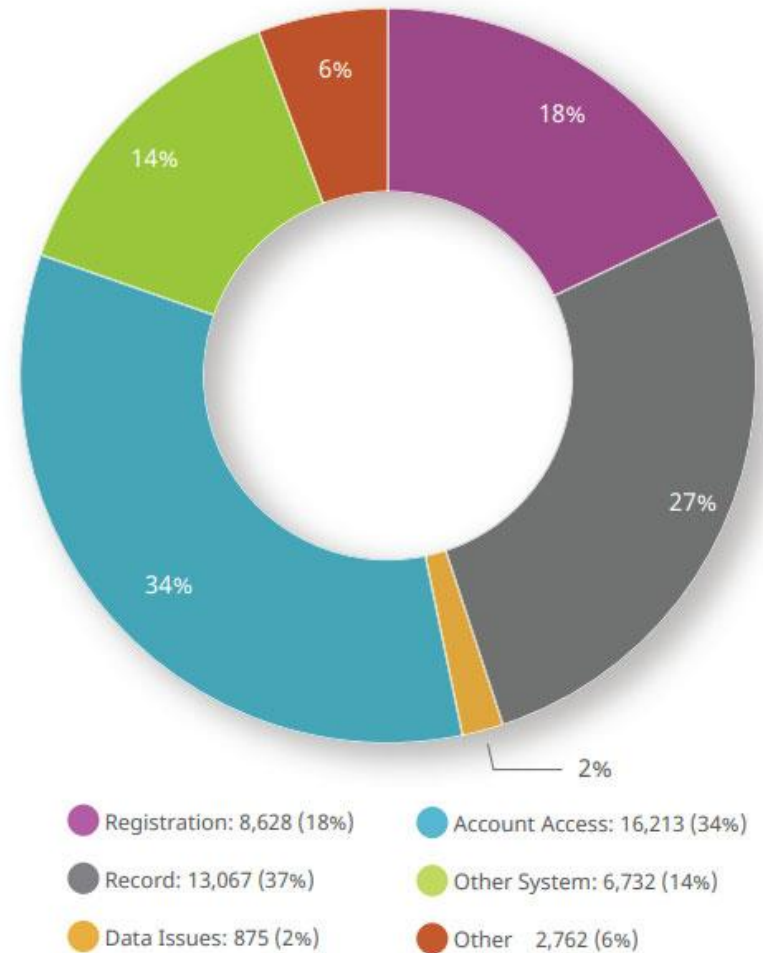
Of these records, **32,982,354**

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



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**."

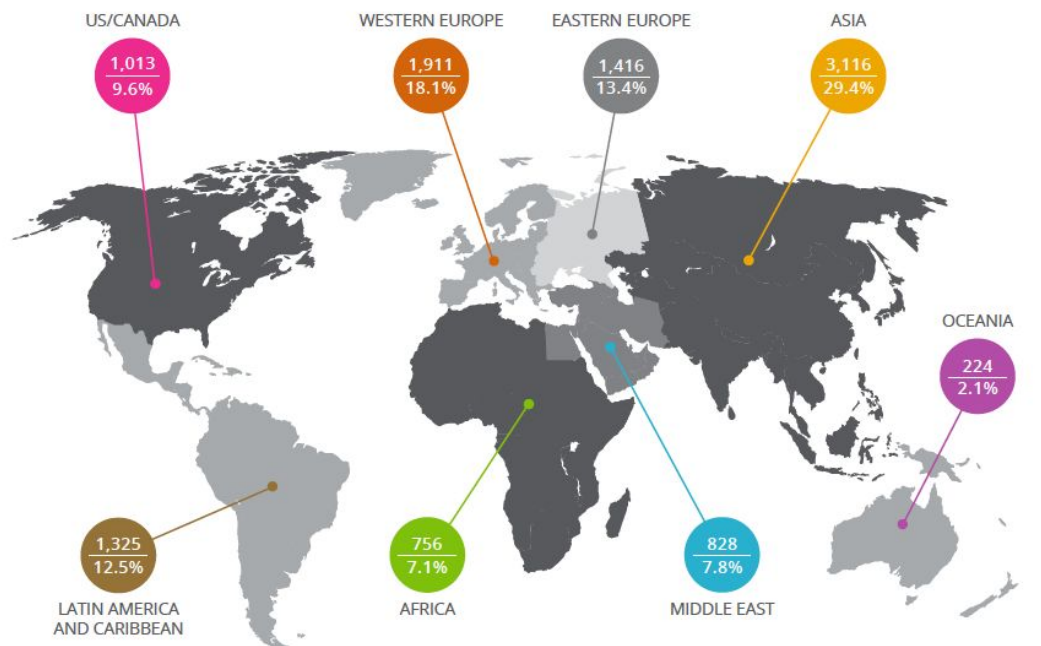
ORCID Events

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 researchers be able to use ORCID 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 high quality data in a way that researchers and their organizations value?
- Will we be able to increase adoption and scale our operations effectively and efficiently?
- Will our partners and members gain value from adopting 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.



Americas Engagement Team

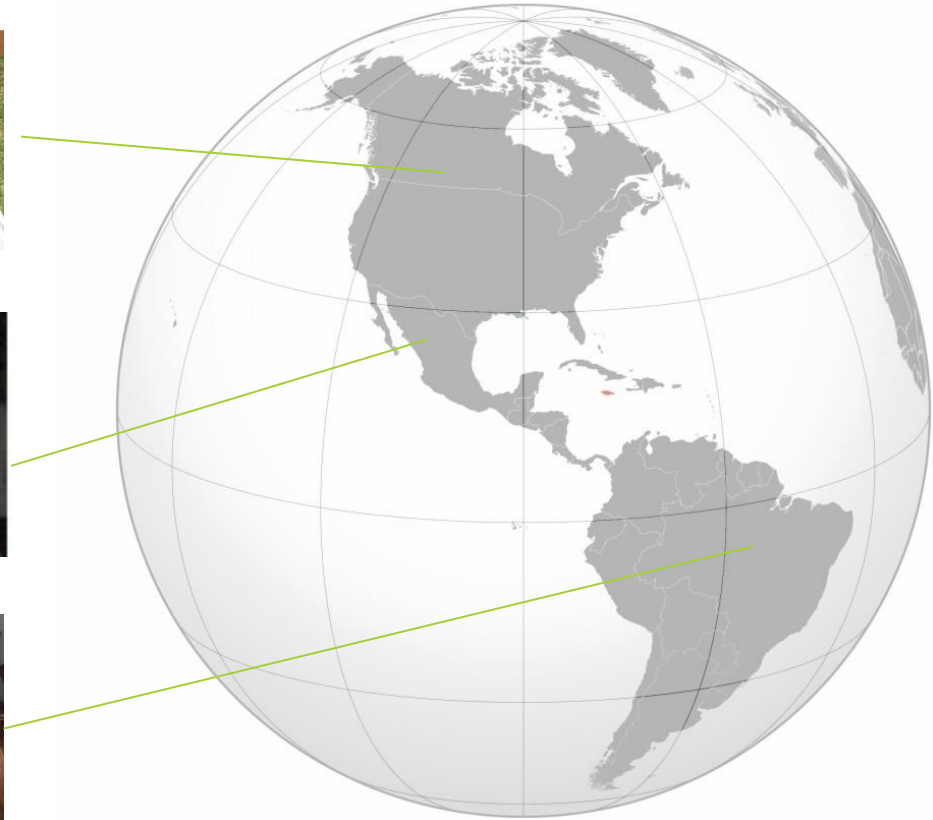
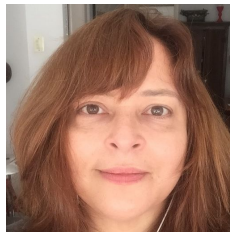
Shawna Sadler
Engagement Team
Manager, Americas



Ana Paty Cardoso
Engagement Lead,
Central America, Puerto Rico,
Caribbean, Technology &
Service Providers across the
Americas



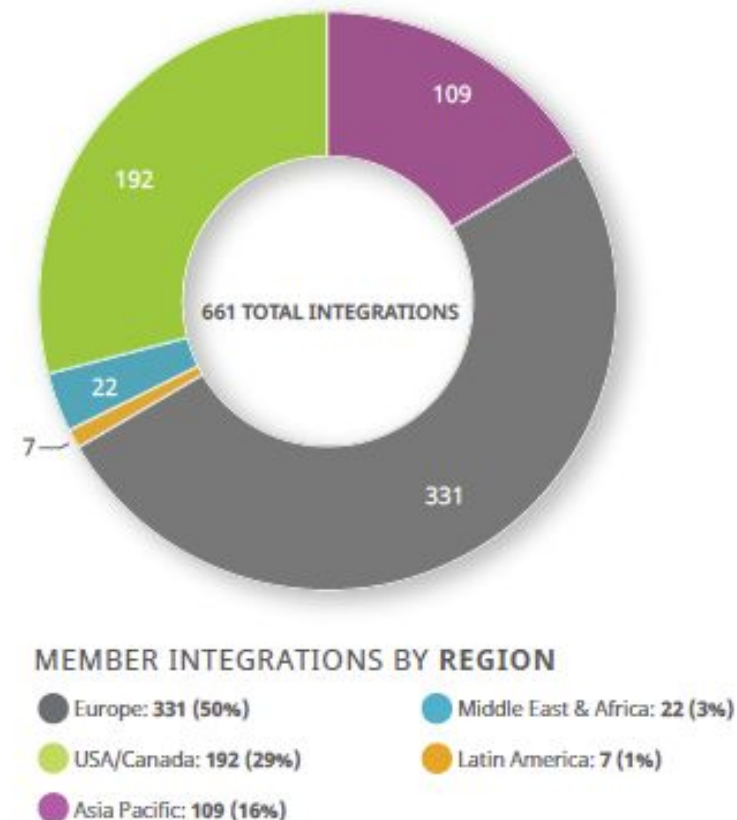
Ana Heredia
Engagement Lead
South America & Publishers
across the Americas



Languages: English, French, Portuguese, Spanish

ORCID in the Americas

- **Four consortia:** CAPES/Brazil, CRKN/Canada, DOE/US, and Lyrasis/US (our largest, with 132 members)
- **Active Members:** The Americas region represents 28% of our membership base and 30% of our total member integrations. In 2019 our Americas members released new ORCID policies and integrations for grants, publishing, research resources, and institutions.
- **Active Users:** There was a 67% increase (2,423,062) in unique registry users in the Americas in 2019



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 Americas Engagement Manager:** s.sadler@orcid.org
- **General questions:** community@orcid.org or contact your consortia lead organization
- **User questions:** <https://support.orcid.org/hc/en-us/requests/new>