ORCID Member Town Hall

June 2021

Agenda

- A look back at 2020
- What we've learned from talking to you
- Looking ahead
- Governance update
- Q&A

ORCID's new Executive Director

- Joined ORCID in October 2020 as the 2nd ever Executive Director

- Spent his career in scholarly communications
  - Background in electronic engineering
  - 25 years at Elsevier, mostly in Product Management roles. Part of the original ScienceDirect team
  - A serial instigator of collaborative community infrastructure projects: Crossref, ORCID, RA21, GetFTR

- A bit of a PID geek!
  - He worked on DOI-X — the project that went on to become Crossref
  - He's served on the boards of the International DOI foundation, Crossref, ORCID and NISO

- British, but has lived in the US for 23+ years
  - He still drinks tea and imports Marmite…

https://orcid.org/0000-0002-1108-3660

https://info.orcid.org/a-warm-welcome-for-orcids-new-executive-director-chris-shillum/

ORCiD

Annual Report 2020

Connecting Research and Researchers

You made this possible - thank you!

Our research institution, publisher, repository, and funder members made **181 new integrations** with the **ORCID API.**

We welcomed **118** new **members** from **52** countries, including our first members in **Thailand** and **Morocco.**

Users visited the **ORCID registry 66,762,440** times, averaging **2.5 minutes per visit.**

2,639,296 researchers registered for new ORCID iDs in 2020, or an average of **7231 new registrants** per day, **an increase** of nearly **33%** over 2019.

We launched our new **Certified Service Providers program,** certifying **10 new** service providers.

Our **social media community grew** to over **45,000** researchers, scholarly comms professionals, academic librarians, funding agencies, and research institutions.

We created **blog content** that generated **256,086 page views.**

We ramped up virtual engagement by hosting **67 virtual events,** staying connected with nearly **7500 community participants.**

Read more about ORCID's 2020

https://orcid.figshare.com/articles/online_resource/ORCID_2020_Annual_Report/14195291

What we've learned from talking to you

Ivo Wijnbergen
Director of Engagement

What we've learned from talking to you

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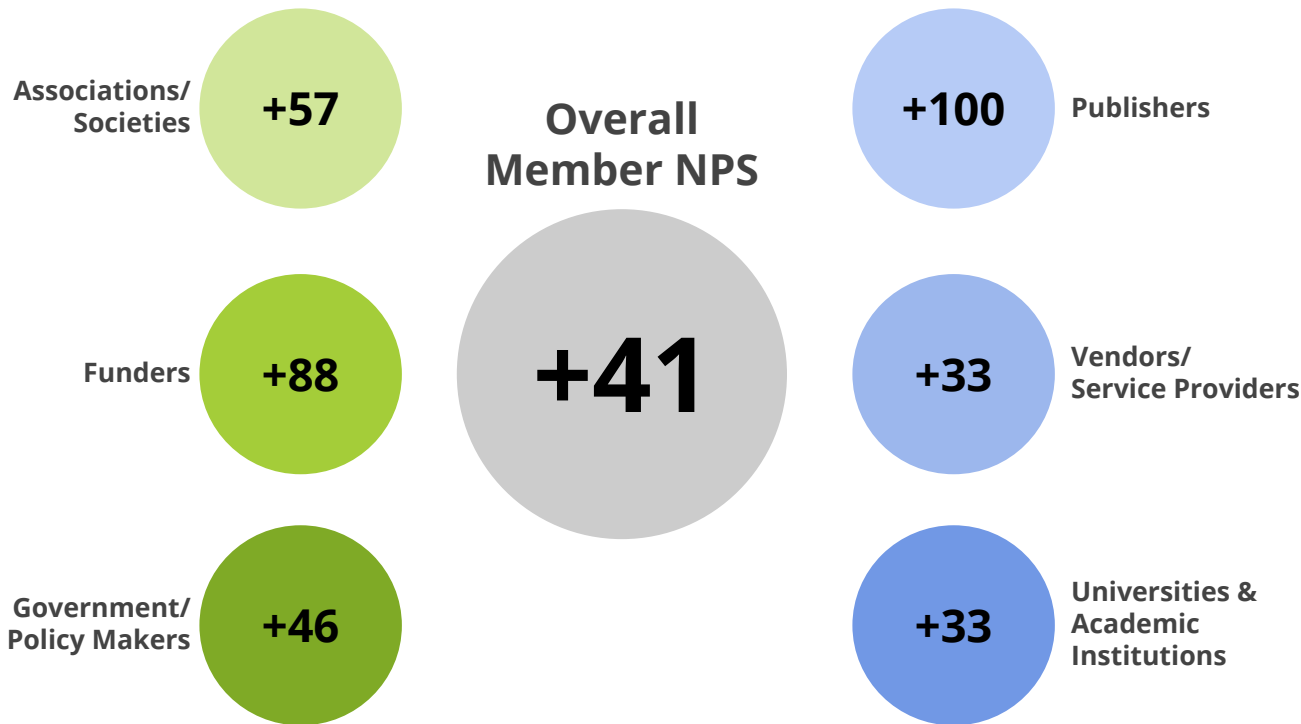# We wanted to learn what members value about ORCID

- We wanted to understand better what we can do to better help you achieve your goals

- Survey sent to all members

- ~40 In-depth interviews with Consortium Leads as well as members representative of our various stakeholder groups

- Insights will inform strategy planning process and priority setting

Key Insights

1. ORCID is strongly supported by each of its main stakeholder groups

2. Our main stakeholder groups have similar goals for ORCID membership

3. ORCID is well aligned with members' strategic objectives, but actually realizing the benefits is more challenging

4. Member satisfaction varies by membership length and whether or not there's an integration

5. The main barriers to adoption lie within member organizations

6. Better-populated records and easier integration are key to fulfilling the promise of ORCID

7. Most members think that ORCID can be trusted with their and researchers' data

8. Very few members are concerned with the cost of ORCID membership, however Consortia would appreciate more flexibility in pricing

9. By far the most valued current membership benefit is access to the member API

10. ORCID member organizations think that it is very important that ORCID is adopted universally around the world

ORCID is strongly supported by each of its main stakeholder groups

Associations/ Societies **+57**

Overall Member NPS

+100 **Publishers**

Funders **+88**

+41

+33 **Vendors/ Service Providers**

Government/ Policy Makers **+46**

+33 **Universities & Academic Institutions**

- NPS, or Net Promoter Score is a standard metric used to measure audience loyalty and satisfaction.

- NPS scores range between -100 and +100. Scores above 0 are considered "good", those above +20 "favourable" and those above +50 "excellent"

Our main stakeholder groups have similar goals for ORCID membership

Support Open Science/Research

Reduce Administrative Burden

Assess and Report on Research Impact

Improve Visibility of Researchers

Improve Interoperability

Identify/Disambiguate Researchers

Improve Data Quality

Meet or Set National or Funder Policy

Based on unprompted top-of-mind responses from member value interviews

Some quotes from our interviews

On Member Satisfaction and time to integrate:
"ORCID does a good job at a lot of things, but it takes time to adopt"
– Government Member

On barriers to adoption:
"If something doesn't fit into a researcher's workflow, they aren't going to do it. ORCID should look at how to make it easier for researchers…
..An integration with Google Scholar would be a lot more efficient." – Consortium Member

On Global adoption:
"Important that it is adopted broadly, research is global and our researchers collaborate with researchers abroad." – Consortium Lead

On Trust:
"I… have not seen any complaints around ORCID. Within the research community, it is seen as a trusted source." – Publisher

On fulfilling the promise of ORCID:
"We have heard from researchers about their hope that in the future, everything will be automatically connected via ORCID." – Consortium Lead

On Global adoption:
"We want to have a single identifier that is available internationally. Especially important for regions with similar names and tend to have lower online presence." – Publisher

On cost and value:
"Provides crazy value for us." – Service Provider

On cost and value:
"ORCID is now so established in the research community, you can't not participate – that would be a … mark [against you]." – Publisher

Looking Ahead

Chris Shillum
Executive Director

We've identified 4 pillars of success for ORCID's 2nd decade

Trust and Integrity

- Maintain the trust and support of all stakeholder groups

Value

- Understand value perception and increase value delivered to each stakeholder group
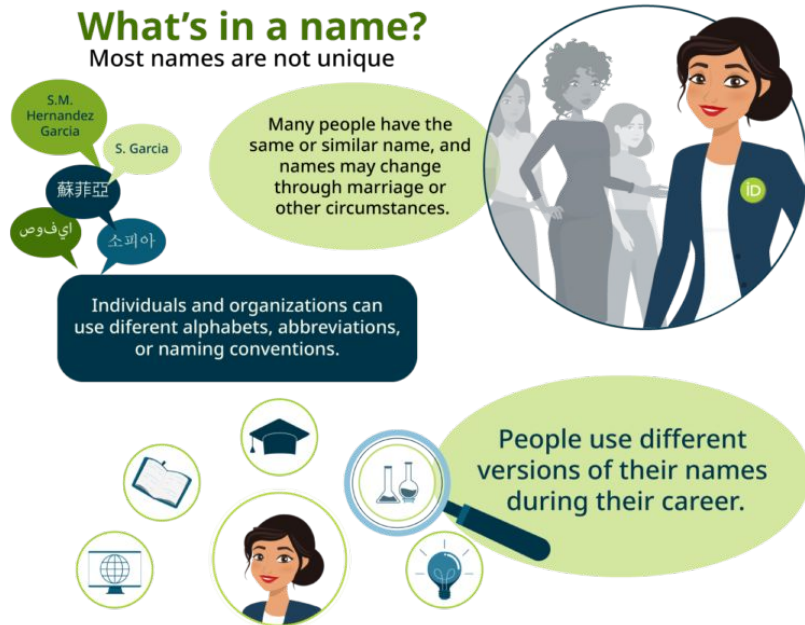
Sustainability

- Continue to adopt models which allow ORCID to scale efficiently, such as national consortia
- Use member funds responsibly through financial discipline and efficient operations

Innovation

- Position ORCID as an infrastructure service which catalyzes and enables innovation across all stakeholder groups

ORCID engenders trust by balancing researcher control and data quality

- Researcher control → trust and participation of researchers → wide uptake and utilization of ORCID by even more researchers and organizations across the globe.

- To balance researcher control with data quality, ORCID utilizes a distributed trust model which allows reliable and trustworthy data sources to be connected via authenticated workflows to an ORCID record with the record holder's permission.
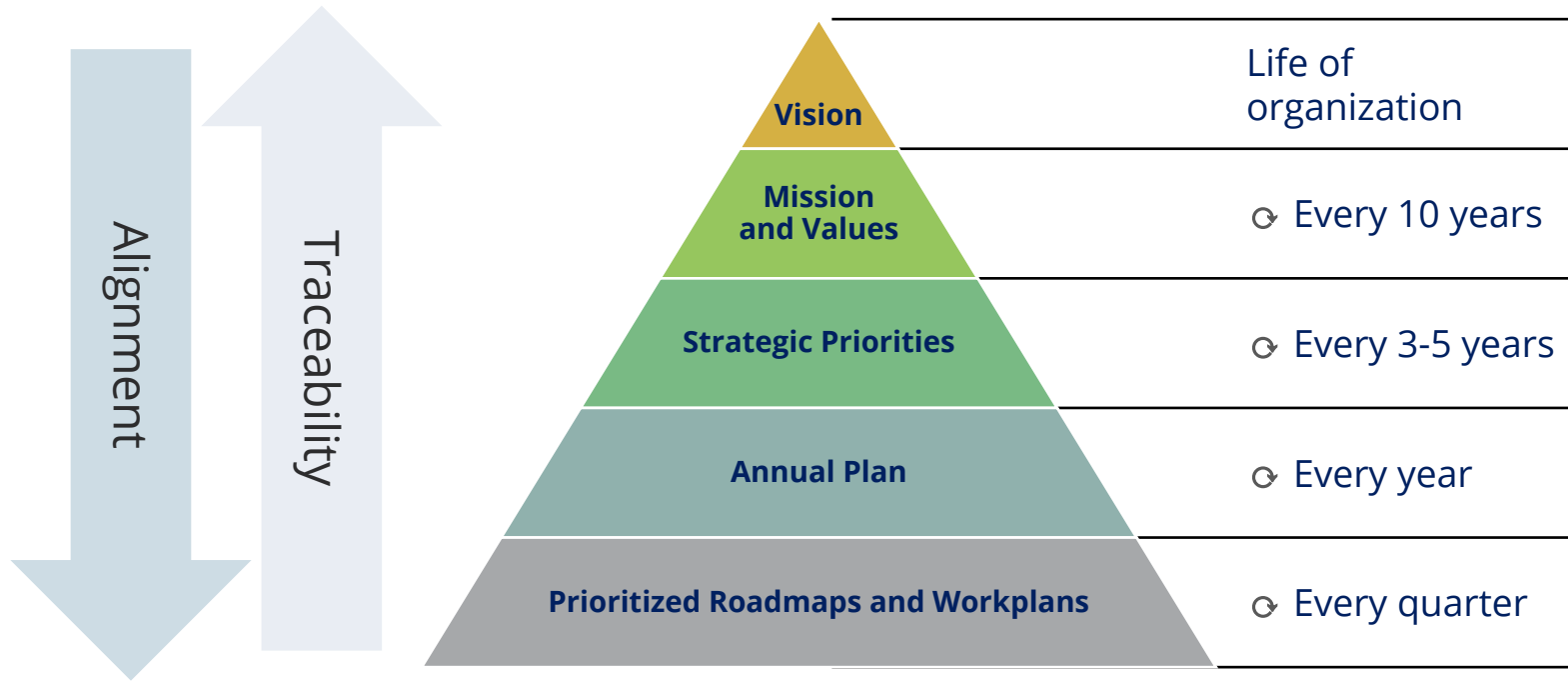
- Read more about this in our recent blog post: https://info.orcid.org/balancing-researcher-control-and-data-integrity/

We have 5 high-level priorities for 2021

01 Strategy
- Introduce and embed more structured strategy planning process

02 Stakeholder Relationships
- Increase engagement team capacity and effectiveness
- Increase cooperation and alignment with peer scholarly infrastructure organizations

03 Membership and product development
- Focus product development activities on increasing member and researcher value

04 Operations
- Increase overall team efficiency through automation and process improvements

05 Employee Experience
- Continue to improve employee engagement, equity and inclusion

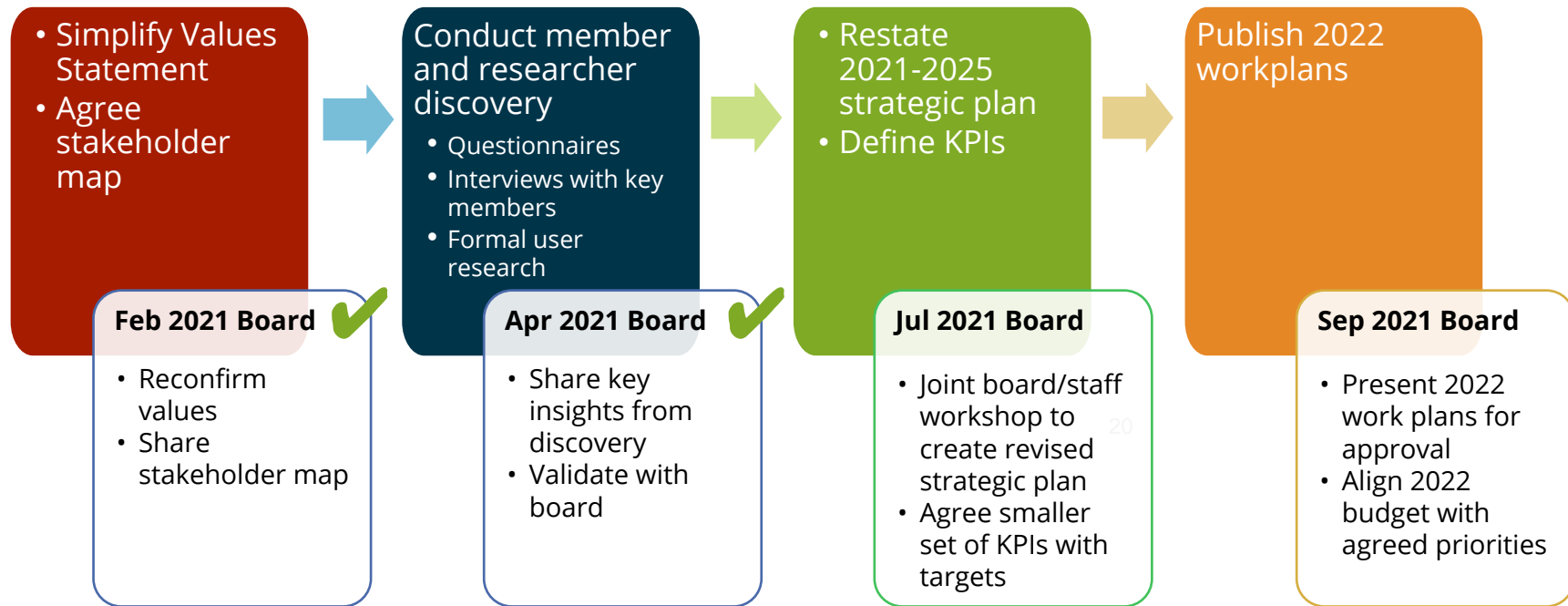# We have introduced a more structured strategic planning cycle

Alignment

Traceability

Vision	Life of organization
Mission and Values	↻ Every 10 years
Strategic Priorities	↻ Every 3-5 years
Annual Plan	↻ Every year
Prioritized Roadmaps and Workplans	↻ Every quarter

We're working towards a new strategic plan, checking in with our board at each stage

- Simplify Values Statement
- Agree stakeholder map

Conduct member and researcher discovery
- Questionnaires
- Interviews with key members
- Formal user research

- Restate 2021-2025 strategic plan
- Define KPIs

Publish 2022 workplans

Feb 2021 Board ✔

- Reconfirm values
- Share stakeholder map

Apr 2021 Board ✔

- Share key insights from discovery
- Validate with board

Jul 2021 Board

- Joint board/staff workshop to create revised strategic plan
- Agree smaller set of KPIs with targets

Sep 2021 Board

- Present 2022 work plans for approval
- Align 2022 budget with agreed priorities

We have restructured our engagement team to better support our stakeholder groups

Director of Engagement

Global Consortia

- Underpins ORCID's sustainability and scaling by growing new consortia
- Facilitates best practice sharing among consortia via Consortia Interest Group and communities of practice

Global Direct

- Focused on improving depth and breadth of ORCID data through better integrations with key members, service providers and vendors

Outreach & Partnerships

- Working with influential funder and government organizations to increase ORCID adoption

Member Technical Support

- Separate dedicated Technical Support staff to improve service levels and responsiveness to our members

We're working with peer organizations to develop shared value propositions

How can we create messaging across all our organizations so that our interoperable PID systems are easier to understand for our shared communities?

- Information design (infographics)
- Joint events
- Shared list of benefits to shared stakeholder groups

We have three goals for our product development activities this year

Raise the proportion of active users who have populated their records or have had their record updated by a member

Raise the proportion of members performing updates, or otherwise enjoying the benefits of their membership

Raise the quality (completeness) of the data we deliver to members via our APIs.

We have an ambitious product roadmap for 2021

Q1

- ✓ **New website**
- ✓ **Member documentation refresh**
- ✓ **Affiliation manager via Member Portal**
- ✓ **Implement CRediT roles**
- ✓ **Ability to link funding identifiers to works**

Q2

- **Improved member reporting via member portal data dashboard**
- **Ability for members to delete items even when the user has revoked permission**

Q3

- **Integrate ROR as an organizational ID**
- **Complete UI Refresh/Speed-up/ Accessibility Improvements**

Q4

- **Self Service in the member portal**
- **New accessibility statement**
- **ROR becomes default**

The ORCID Member Portal is the anchor for improved member benefits

AFFILIATION MANAGER

- Allows organizations to easily enlist researchers to add their validated education or employment to their ORCID records

DATA DASHBOARD

- Visual statistical information about your ORCID integration

SELF SERVICE MANAGER

- Tool to keep your ORCID contacts up to date
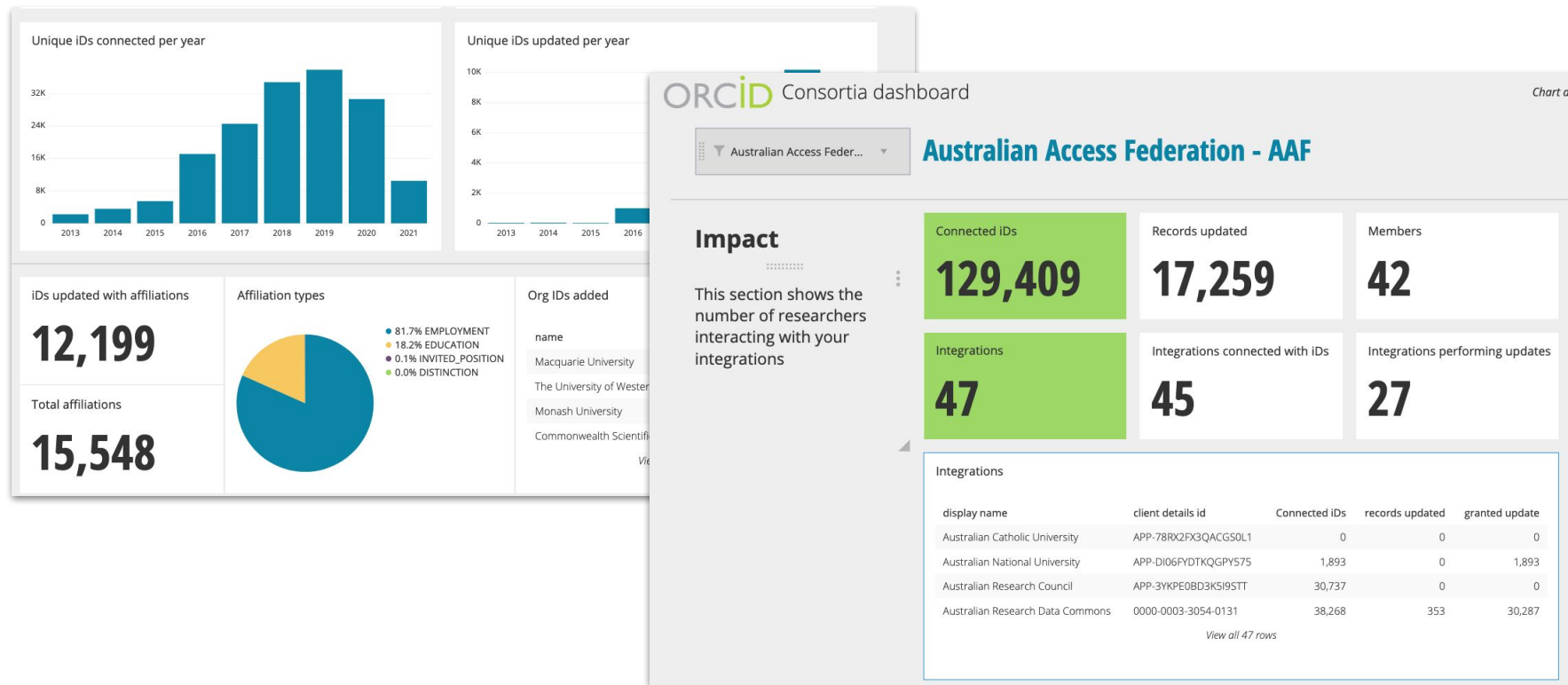
The Affiliation Manager is now released

- Allows organizations to gain value from ORCID membership without having to do technical integrations

- Currently an exclusive benefit for consortium members

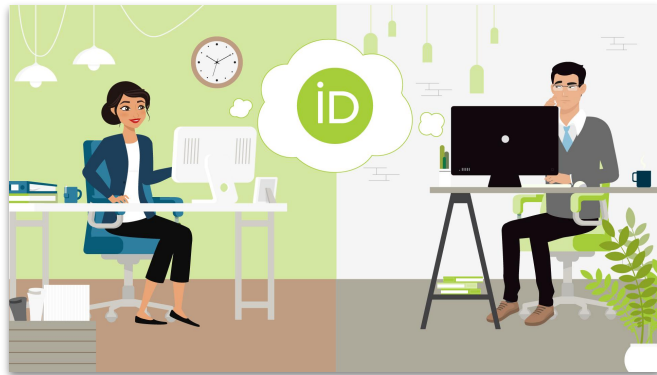- We are working through privacy changes for EU and UK members

Improved member reporting is coming in Q2

Our communication activities aim to support our members in two key activities

- Raising Researcher Awareness

- Engaging Organizational Stakeholders

- *Building Technical Integrations*

A Quick Tour of the ORCID Record
https://vimeo.com/495762735

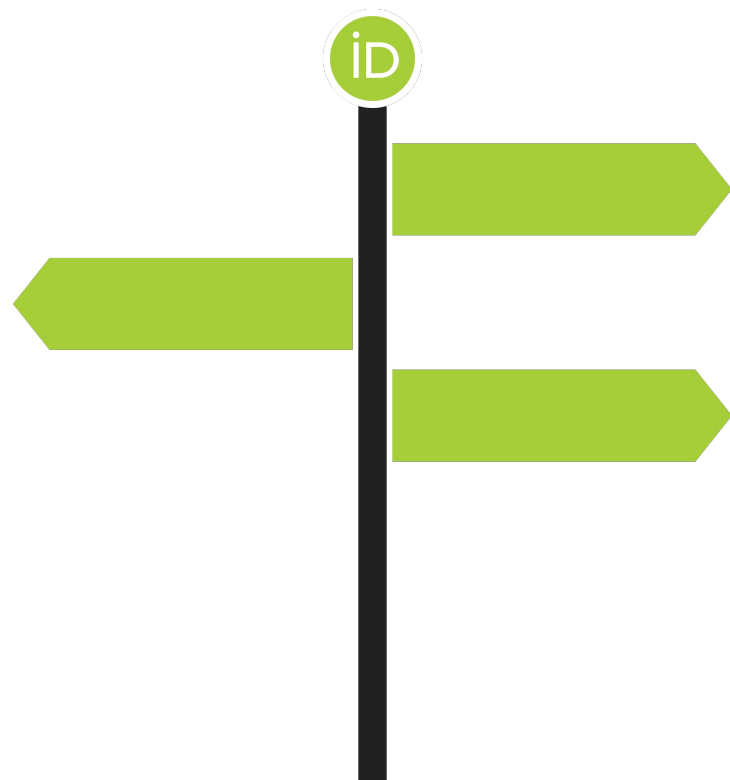https://info.orcid.org/outreach-resources/

Wrap up

- ORCID is taking a deep dive into understanding our community through member and value research

- We're focusing our product development activities on providing long-awaited new capabilities to members, whilst also making the registry streamlined and easier to use for researchers

- We're re-organizing our engagement team to better focus on the specific needs of our different stakeholder groups

- We're providing communication resources to allow members to drive engagement and understanding among organizations and researchers alike.

- **We appreciate the partnership and great support of all of our members**

Governance Update

Veronique Kiermer
Chair, Nominating Committee

ORCID Board Nominations

We are specifically seeking those who have experience with the following areas:

- Risk management, with legal, privacy, or IT focus

- Financial management and business modeling, with an interest in serving as Treasurer in the future

- Advocacy in research communities on behalf of ORCID, in particular through networks in Asia, the Middle East, and Africa, to complete the Board composition in light of ORCID's global footprint

- In-depth understanding of the arts, or humanities, and social sciences research communities, and their relevant needs

- Nominations form:
  https://www.surveymonkey.com/r/2022-orcid-board-member

ORCID Board 2022 Election Key Dates

Date	Activity
May 25, 2021	Call for Board member recommendations
August 9, 2021	Closing date for board recommendations
September 21, 2021	Nominating Committee presents slate for Board approval
September 29, 2021	Slate made public
October 29, 2021	Closing date for alternative nominations
November 1, 2021	Voting opens
December 1, 2021	Voting closes, results announced at virtual members meeting
January 1, 2022	Elected members start their term
February 2022	Board Meeting (Date TBC)

Researcher seat on the ORCID Board

- We have two board seats reserved for active researchers, not necessarily affiliated with member organizations

- This year, one is up for election

- The Nominating Committee will be looking for researcher candidates who:

  - Are early or mid-career researchers enthusiastic about ORCID

  - Can advocate on behalf of ORCID in their communities

  - Have experience or a keen interest in governance of non-profit organizations and research infrastructures

- Form: https://www.surveymonkey.com/r/orcid-researcher-nominations

ORCID Researcher Advisory Council

For the first time, we are introducing a Researcher Advisory Council, to increase accountability to and representation from the diverse, global, research community we serve

Members of the ORCID Research Advisory Council will advise ORCID Board and staff on matters such as, but not limited to:

- ORCID's policy as it relates to researchers, especially privacy-related matters
- ORCID's strategy, particularly around researcher engagement and maximizing value to researchers
- Ease of use of the ORCID registry
- Researcher use cases and functionality of the ORCID registry and related tools
- Integration between ORCID and other tools, systems, and services used by researchers
- Communication and outreach to the researcher community to drive adoption and use of ORCID
- The use of ORCID data in research and meta research, including the public data file

Appendix

Methodology: The Member Value Research project comprised two elements

The 2021 member survey

- Open from 29-Jan-21 through 4-Mar-21
- Promoted via monthly member newsletter, an email campaign to main contacts at member organizations, and by direct invitation to individual members on an ad-hoc basis.
- 260 responses from 1167 active members at the time of survey closing, a response rate of 22%
- Of the responses, 187 were complete, a completion rate of 72%.

ANSWER CHOICES		RESPONSES	
▼ University or Other Academic/Research Institution		72%	186
▼ Government Agency		7%	18
▼ Association/Society		7%	17
▼ Publisher		5%	14
▼ Funder		4%	11
▼ Other (please specify)	Responses	3%	8
▼ Third-Party Service Provider/Vendor		2%	6
TOTAL			260

Member value interviews

- 40 In-depth hour-long structured interviews via Zoom
- Conducted by Executive Director and Director of Communications
- Held between 14-Dec-20 and 1-Apr-21
- Targeted to Consortium Lead organizations and other key members across different stakeholder groups
- 18 out of 24 Consortia Leads participated (75%)

Member value interview participants