



# ORCID Community Town Hall 2022

*February 23, 2022*



# Agenda

- A look back at 2021
- Trust at ORCID
- From Vision to Value: ORCID's Strategic Plan 2022–2025
- Our 2022 plans
- DEI at ORCID
- Governance update
- 2022 is ORCID's 10th anniversary
- Q&A

# A look back at 2021

# We're increasing global participation

Yearly Active Records

**7,603,466**

Active Integrated  
Systems

**3,925**

Countries  
with  
members

**55**

National  
Consortia

**24**

## Legend

-  National ORCID Consortium
-  ORCID member

**1,219**

Organizational  
Members

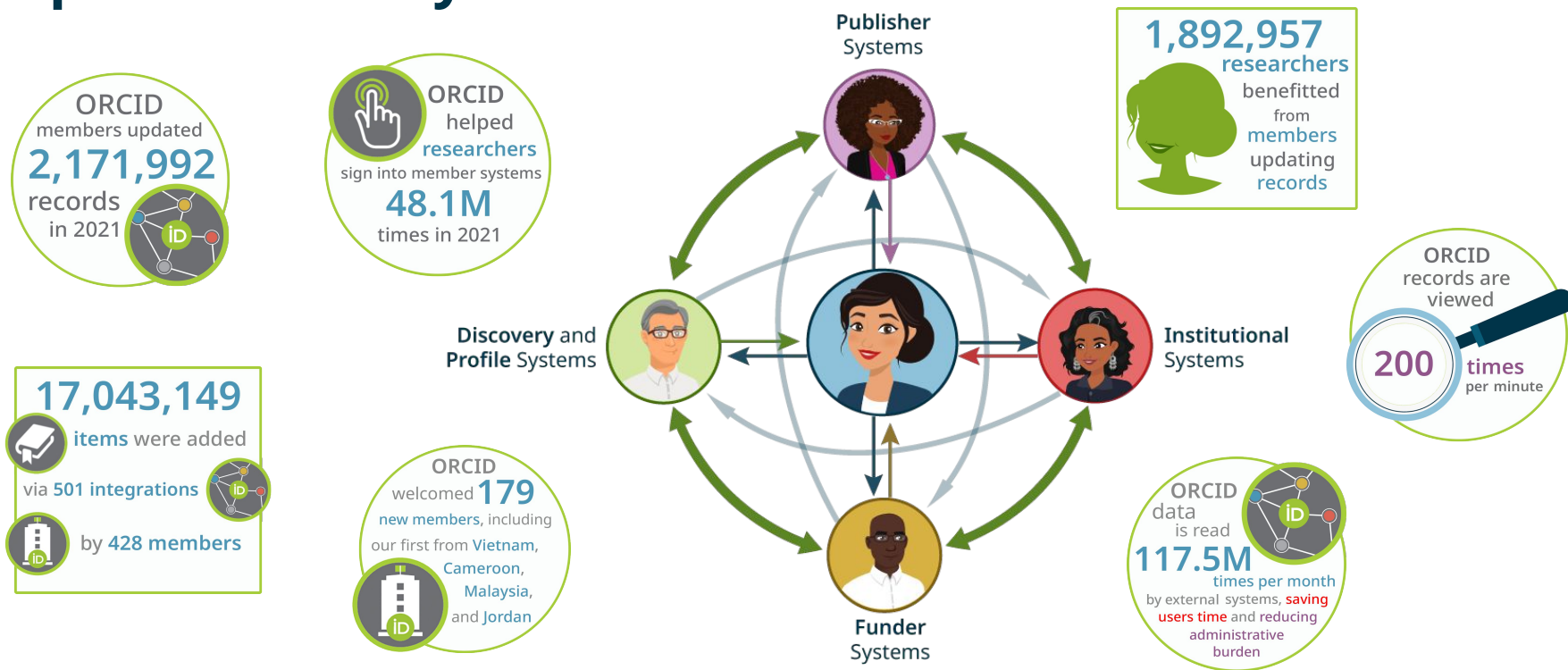
Users Granting  
Update Permissions

**5,923,544**



Stats updated 2/23/2022

# ORCID is increasingly a hub for an immense amount of profile activity and data



# We're continually making it easier to use ORCID

We updated the My ORCID user experience...

...and launched the Affiliation Manager

The screenshot shows the 'My ORCID' user profile for Julie Petro. The profile includes a header with the ORCID logo and the text 'Connecting research and researchers'. Below the header, there is a search bar and a 'Printable version' link. The profile is divided into several sections: 'Names' (showing 'Julie Petro'), 'Emails', 'Websites & social links', 'Keywords' (listing various communication and marketing roles), 'Countries' (listing 'United States'), 'Biography' (describing her role at ORCID), and 'Activities' (showing 'Employment (6)'). A red box highlights the 'Source: ORCID via ORCID Member Portal' text in the 'Employment' section.

The screenshot shows the 'Affiliations' table in the Affiliation Manager. The table has columns for ID, User Email, ORCID ID, Affiliation Data, and Status. It lists two affiliations for the user j.petro@orcid.org.

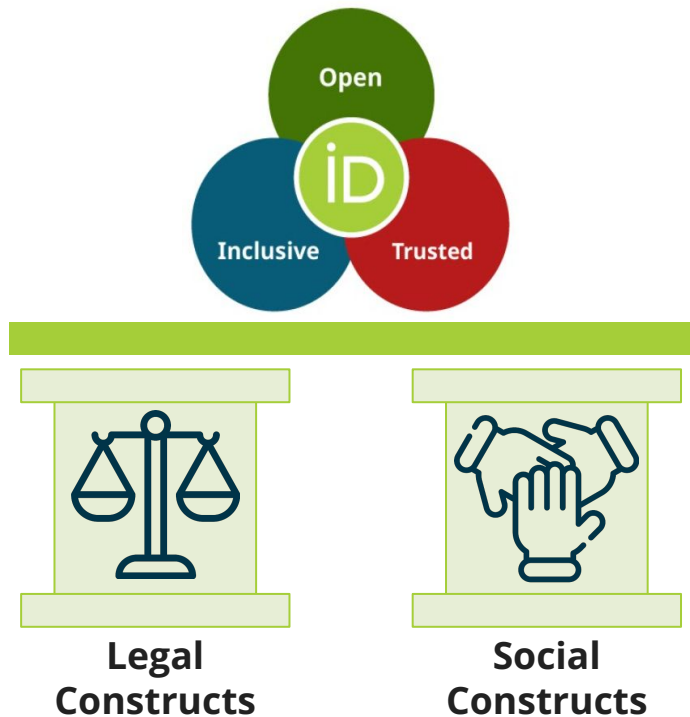
ID	User Email	ORCID ID	Affiliation Data	Status
603ea54fa1de180008761ab	j.petro@orcid.org	https://orcid.org/0000-0003-4967-747X	EMPLOYMENT ORCID: Bethesda, US Communications (Senior Communications Manager) 2019-07-22 to 2019-12-31 <a href="#">View Details</a>	In ORCID <a href="#">Edit</a> <a href="#">Delete</a>
603ea54fa1de180008761ac	j.petro@orcid.org	https://orcid.org/0000-0003-4967-747X	EMPLOYMENT ORCID: Bethesda, US Communications (Director of Communications) 2020-01-01 <a href="#">View Details</a>	In ORCID <a href="#">Edit</a> <a href="#">Delete</a>

So that ORCID consortium members can write authoritative affiliation data to ORCID records.

# How we think about Trust...

# ORCID was built from the ground up to win the broadest possible trust of the communities we serve

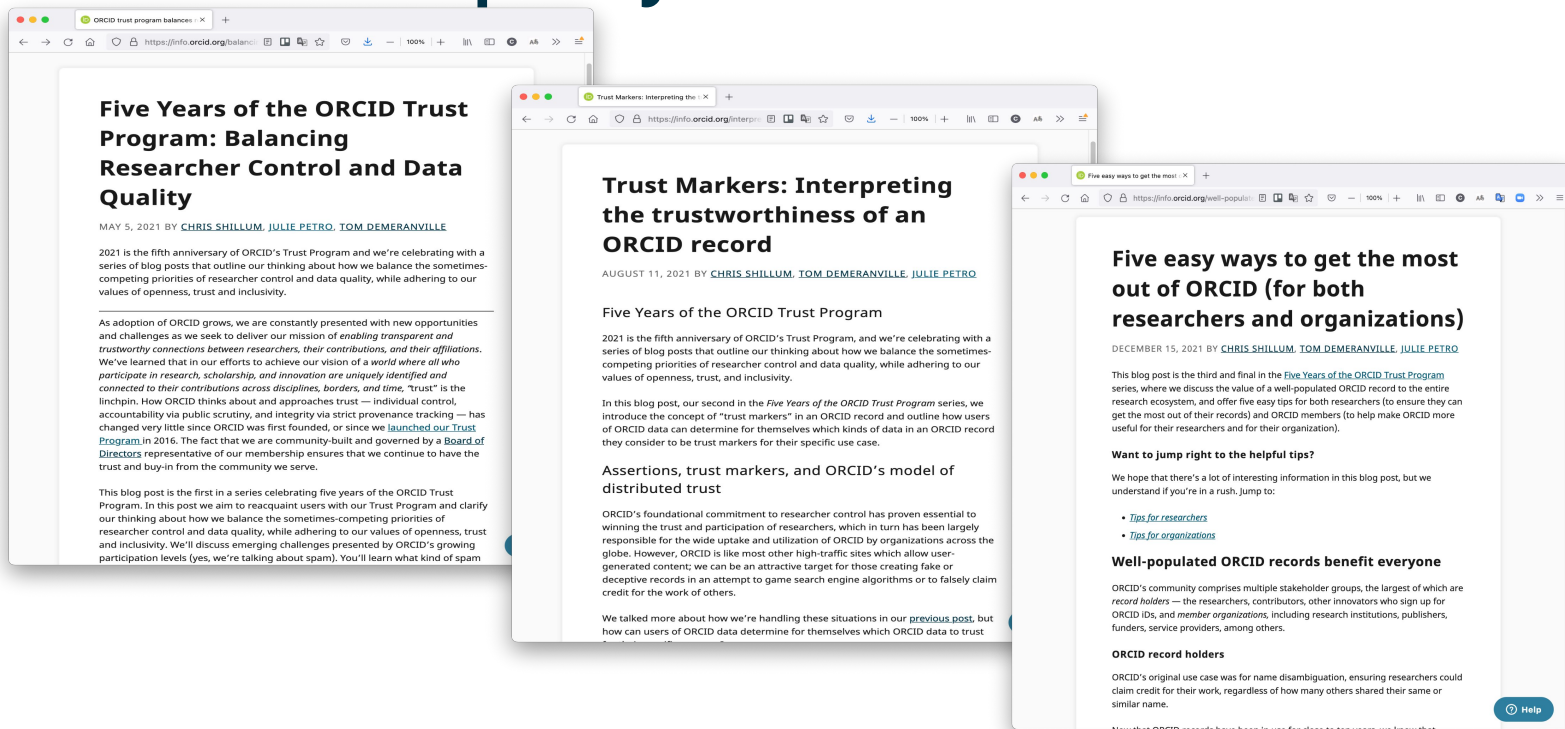
- Legal incorporation as US non-profit entity
- Membership organization open to all
- Governed by board elected by our members
- Legally binding membership agreements
- Privacy policy regulated by GDPR and other national regulations
- Legally binding employment agreements, code of conduct, etc



- Founding principles and values
- Commitment to researcher control
- Open source software and FAIR open data
- Equitable, sustainable business model
- Holding ourselves accountable by working openly
- Continuous community engagement and dialog



# With our trust program, we seek to balance research control and data quality



Read our blog series starting at <https://info.orcid.org/balancing-researcher-control-and-data-integrity/>

# From Vision to Value



Read more at <https://info.orcid.org/2020-2025-strategic-plans/>



# From Vision to Value

ORCID's 2022–2025 Strategic Plan

# From Vision to Value

↑↑ The core of our strategic focus for 2022–2025 is to **build commitment to and engagement with ORCID** as an essential element of the research experience, both for researchers and member organizations.



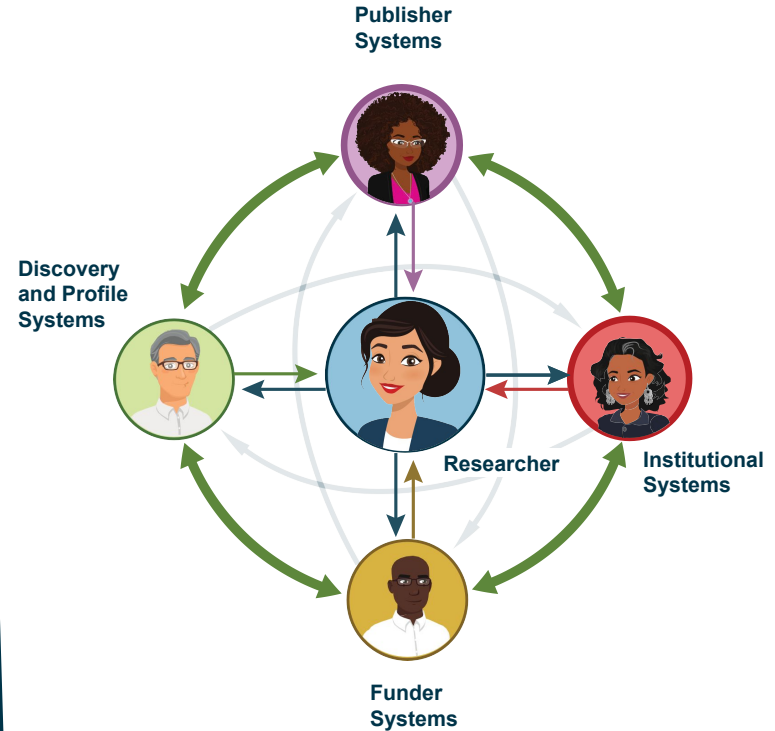
↑↑ As in all things, our strategic plan aligns with ORCID's values: **Open, Inclusive, and Trusted.**

## Fostering behaviors to drive the ORCID “virtuous circle”

Our stakeholders generally have two overarching goals for their participation in ORCID:

1. Reduce administrative burden
2. Understand the impact of the research they facilitate or fund

The more fully populated, sufficiently complete ORCID records and integrated systems there are, the more value that stakeholders can gain from participating in ORCID. It is our goal to create the conditions to allow this to happen.



# 2022–2025 Strategic Themes

In order to build commitment to and engagement with ORCID as an essential element of the research experience, we have identified four major strategic themes for the next three years.

These themes, insights, and priorities form a framework by which we will organize and prioritize our activities across the organization, as well as to measure and communicate our progress with each other and our community.



**Increasing  
Value to  
Members**



**Increasing  
Value to  
Researchers**



**Increasing  
Global  
Participation**



**Upholding Trust  
and Integrity**

# What we're up to in 2022



# Increasing Value to Members



## Strategic Priorities

- *Be more proactive in delivering value to member research institutions*
- *Equip our members with more compelling ways to encourage their researchers to use ORCID*
- *Work with influential organizations such as Funders and Government Agencies*

## 2022 Goals

Increase the adoption of features such as the **Affiliation Manager**

Establish **stronger relationships** with vendors and SPs, define incentives/**best practices** per workflow, and use them to revamp our certification program

Develop **simpler, easier-to-reuse** outreach resources, as well as success stories and best practices. Use new **value stories** across our engagement channels to help members in each stakeholder group understand the value of ORCID for them

Establish **closer collaboration** with key stakeholders such as Consortium Leads and international funders through Interest Groups, providing a platform to share success and best practices and accelerate deeper integrations

Develop **cross-PID** organizational communications, messages and activities to promote interoperable PID landscape



\*Also increases value to researchers





# Increasing Value to Researchers



## Strategic Priorities

- *Reduce the effort that researchers need to invest in completing and updating their ORCID records*
- *Incentivize researcher participation in ORCID*

## 2022 Goals

Make ORCID **easier to understand** and help researchers **find and use** the functionality that will benefit them most via in-product prompting and automation, how-to messaging in our support channels and further development of microlearning resources

Design and implement improved **co-author/collaborator** functionality, likely around the concept of collaborator lists

Establish **stronger relationships** with vendors and SPs, define incentives/best practices per workflow, and use them to revamp our certification program\*



\*Also increases value to members



# Increasing **Global Participation**



## Strategic Priorities

- *Move from a fee structure based on equality to one based on equity*
- *Support the development of local expertise and communities of practice.*
- *Develop new partnership models with organizations that have both local knowledge and resources*

## 2022 Goals

Attract new members by implementing the new consortium fee tiers, introducing the **discount scheme** for lower income countries and launching our **global participation fund**

Investigate how to better deliver the registry experience to users with low power devices in the **global south** and start implementation

Explore **partnerships**, and build insights and connections in order to develop regions with low or no adoption to increase global participation

Develop and launch a series of recurring ORCID “flagship” events around **Instructional, Informative, Collaborative**, and **Connective** themes.

Continue developing content that **equitably represents** our global community. Re-engage with our community to develop translations for our outreach materials.



# Upholding Trust and Integrity



## Strategic Priorities

- *Take a more proactive approach to improving data quality*
- *Improve resiliency and reliability of our infrastructure*
- *Ensure our long-term sustainability and anticipate future necessary investments or financial shocks*

## 2022 Goals

Operationalize the discovery and **elimination of spam**

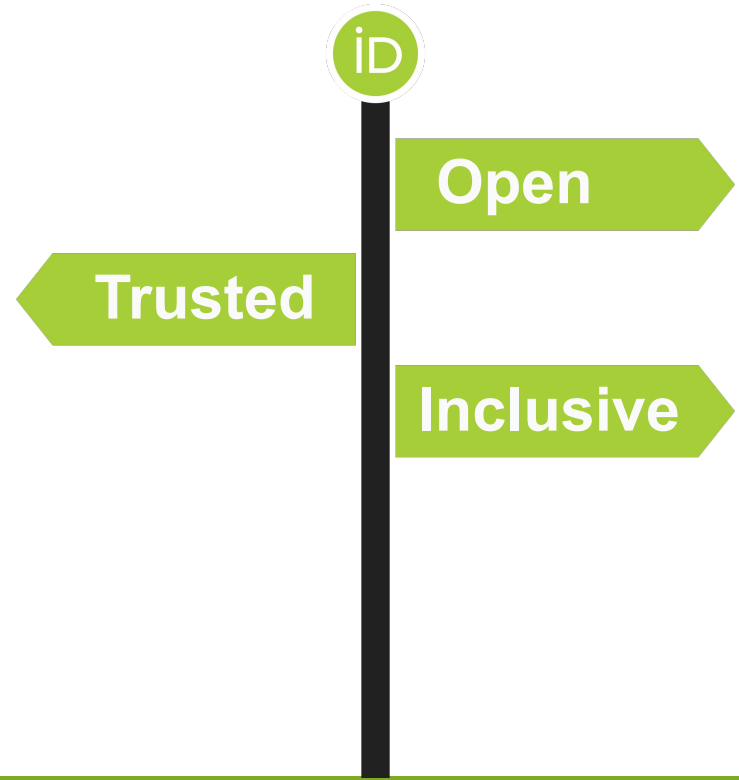
**Increase security** through re-architecture of registry admin tools, regular penetration testing and increased use of security scanning tools

**Improve developer productivity** through extensive automated QA coverage and other improvements

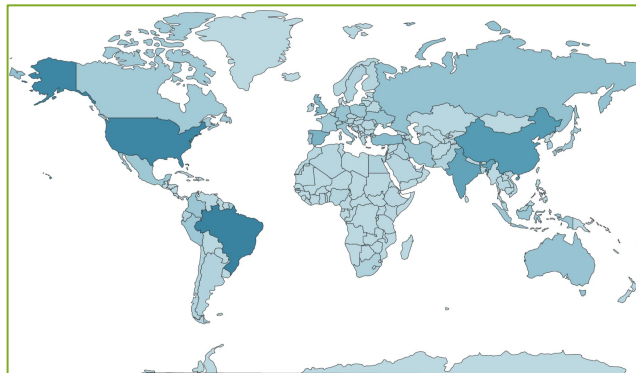
# Diversity, Equity and Inclusion at ORCID

# Why focus on DEI at ORCID?

- To hold us accountable for living up to our values
- Forum to raise issues, share learning, and to propose solutions

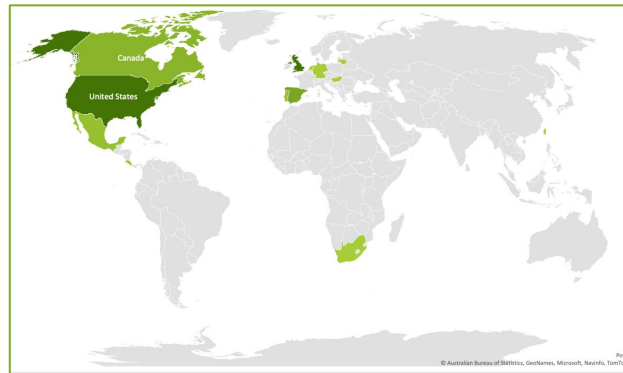
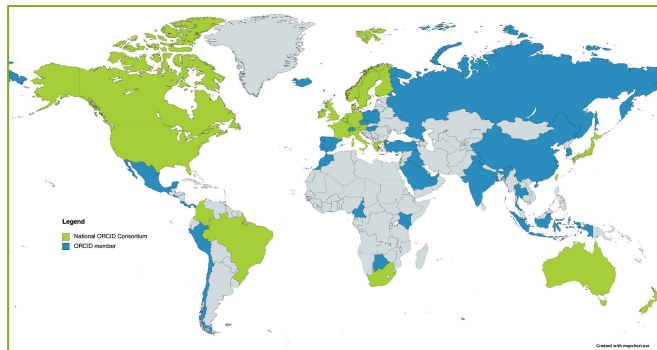


# We are geographically dispersed along three axes



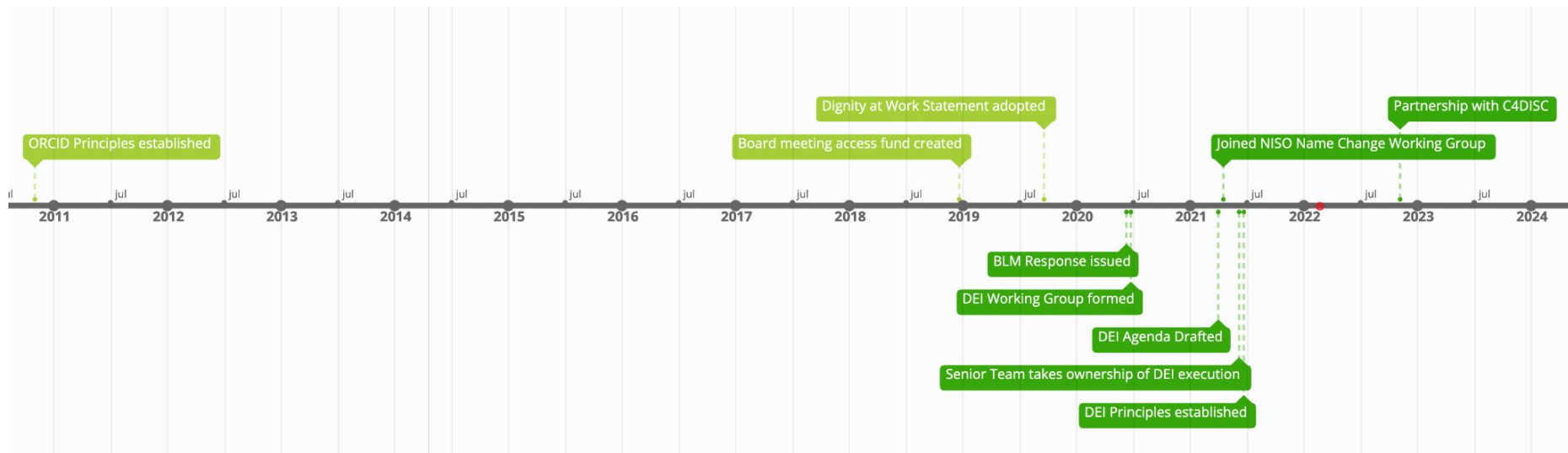
**Users in 246 countries**  
(That's every country on the planet apart from Niue, Norfolk Island, and Saint Pierre and Miquelon)

**Member organizations  
in 55 countries**



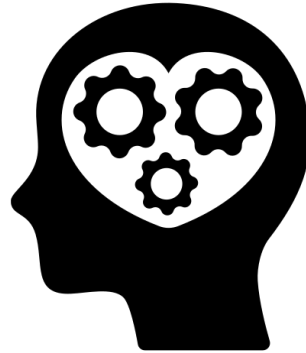
**Staff in 14 countries  
across 5 continents**

# ORCID's DEI journey dates back to our founding, but intensified following the US events of 2020

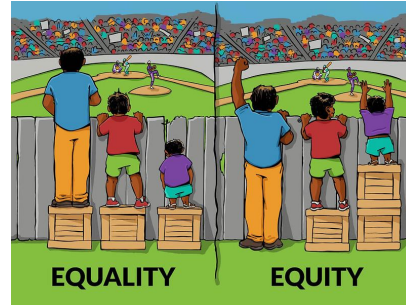


# We worked together to define our set of DEI-specific principles

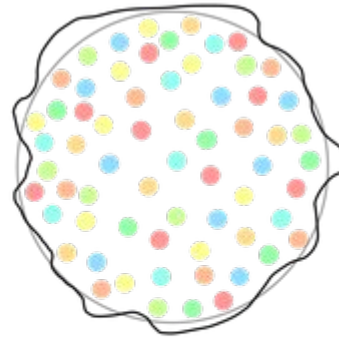
- Empathy
- Equity
- Transparency
- Appreciation
- Inclusion
- Humility



Victorvul, CC BY 4.0 via Wikimedia Commons



Angus Maguire/Interaction Institute for Social Change





# Everyone is responsible for DEI at ORCID

- Diversity, Equity and Inclusion should not be considered a separate “bolt-on” activity for ORCID.
- Like privacy, DEI should be **embedded into everything we do**, and we should examine every activity and project with a DEI lens to ensure that it adheres to our values and founding principles
- Our “**DEI Agenda**” tracks the specific activities we are working on that have DEI considerations
- Senior Team members have been assigned as owners for each of our DEI Agenda activities

Project/Activity/Area	Snr Team Sponsor	Business Owner (if different)	Description	Latest Review Date	Status	Comments
Improving translation on the info site	Julie	Rob	We have implemented GTranslate to automatically translate content on the info site into all of our supported languages. Our former solution had a complex workflow with multiple bottlenecks and it was cost prohibitive to supply translations for all material on the info site in all of the languages we support.	6-Sep-21	Complete	So far this process has been minimally disruptive. We will be adding new languages to the info site via GTranslate as they are supported in the registry (via Transifex).
Recruitment Process	Sarah	Sandy	We are reviewing the inclusivity of our recruitment practices, from our job posting template and the job boards we typically use, to usage of Bamboo as an Applicant Tracking System, to how we structure interviews, exercises, and evaluate candidates.	28-Jul-21	In progress	We have researched, discussed and updated our job posting template with the DEI committee (complete), as well as implemented the blinding of candidate exercises and the interview selection process.
User engagement campaign	Julie		We are engaging in a multi-channel campaign to encourage ORCID users to visit their records and populate them with 1) an additional email address 2) a biography 3) an affiliation 4) a work of some kind featuring a cast of ORCID “characters” representing a wide spectrum of nationality, race, and gender.	7-Sep-21	In progress	We continue to amplify and reshare the materials we have created so far, including our videos, microlearning pieces. We are currently developing five new “characters” representing various ORCID persona.
Accessibility	Tom	Dan	We looked into our accessibility and published our first accessibility statement in 2020. In 2021 we aim to improve the accessibility of the registry, validate those improvements	9-Sep-21	In progress	We have made significant progress with the release of the redesigned public page. It has 75% fewer accessibility issues (26) than the previous UI (84).

# ORCID governance update

# Welcome to ORCID'S new Board members!

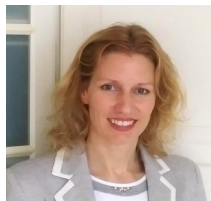
- [Amal Amin Ibrahim](#), Associate Professor, National Research Center, Egypt  
(Researcher Seat)
- [Katherine McNeill](#), Research Data Program Manager, Harvard University
- [Lori Ann Schultz](#), Assistant Vice President, Research Intelligence, University of Arizona
- [Michael Ulliyot](#), Associate Professor, University of Calgary
- [Jesse Xiao](#), Data & Scholarly Communications Librarian, University of Hong Kong



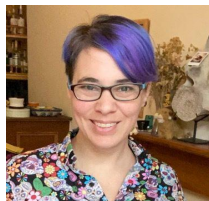
# We've formed the ORCID Research Advisory Council (ORAC) to increase our accountability to researchers



[Timothy Adivilah  
Balag'kutu](#)



[Sima Berendes](#)



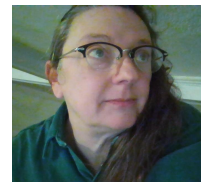
[Lisa DeBruine](#)



[Rounak Dubey](#)



[Difuza  
Egamberdieva](#)



[Lisa Jo Elliott](#)



[Paul Farrow](#)



[Alex Godoy](#)



[Andre Leon S.  
Gradvohl](#)



[Lasith  
Gunawardena](#)



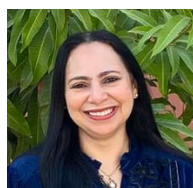
[Caroll  
Hermann](#)



[Romain Jacob](#)



[Adviti Naik Jana](#)



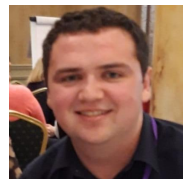
[Rania M Rafik  
Khalil](#)



[Pradeep Kumar](#)



[Niels G. Mede](#)



[Declan  
O'Loughlin](#)



[P. Ravi Shankar](#)



[Suzanne Stewart](#)

# Our Board Alumni Network was established to ensure continuity of leadership at ORCID

In 2021 we saw the last of our founding board members reach their term limits

- 24 former board members
- Help to onboard new Board directors
- Lend their expertise by serving on committees
- Mentor staff in areas of experience or specialization



# ORCID's 10th Anniversary

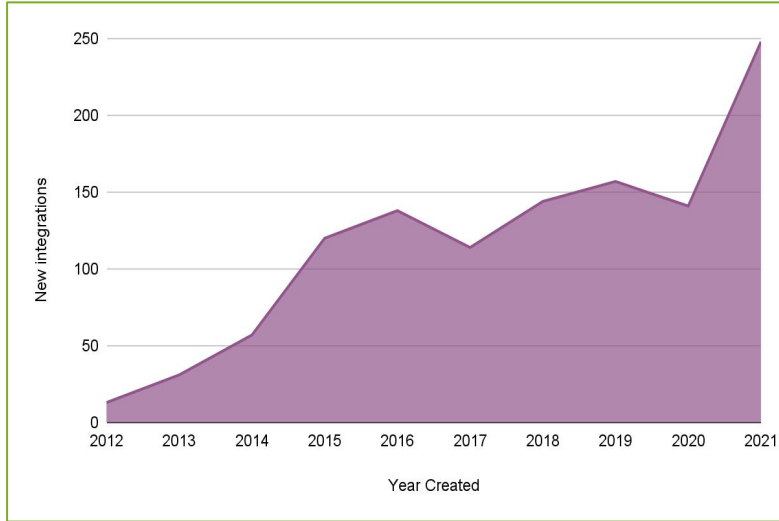
# ORCID turns 10 in 2022!

ORCID Registry was launched  
in October 2012

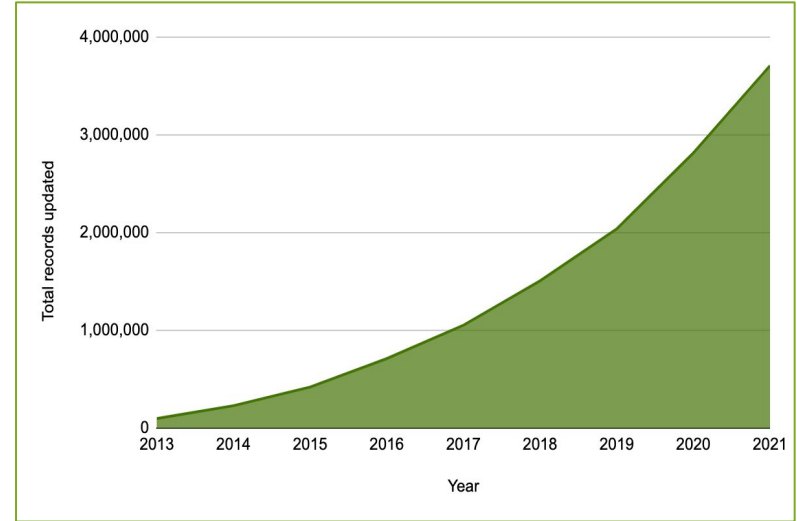
Special events throughout  
the year — stay tuned!

10<sup>th</sup>  
Anniversary

# As we enter our 10th year, we look forward working with you to build on the momentum and success of our first decade!



**Number of member integrations per year**



**Cumulative number of records updated by members**





# Q&A

## Question

I'd love to hear more about why text-based publications and conference proceedings are considered primary research outputs while many important research outputs are 'othered'?

## Answer

Our work type taxonomy was originally based on the standard developed by Casrai, including the unfortunately named category and type of other-other. Since casrai ceased maintaining the standard we've added a few more types (preprint, annotation, physical-object and software) in consultation with the community. Ideally we'd see some other body, such as niso, take over the maintenance of the standard so that we can have expert input into they types we should support.

## Question

Are their any plans to add peer reviewed information to an journal article or conference paper entry?

## Answer

Our peer review section can include open peer reviews, including links and identifiers for the review itself. In addition, we are adding a new work type, 'review' so that these can be included in the list of works.

## Question

For collaborators, will you use the Credit taxonomy?

## Answer

Yes, we already support the credit taxonomy via the API and that support is being extended to the user interface too.

# Q&A

## Question

What do you class as spam, and are there any plans to tackle "fake" ORCID IDs created by paper mills, for example?

## Answer

We differentiate between SEO or link “spam”, which is usually an attempt to boost search engine rankings using ORCID records, and blatant attempts to claim false academic records. The former is handled by our internal processes, the latter would be subject to our dispute resolution process – anyone can report concerns with false claims in ORCID records and we will investigate with the record holder. You can read more about our approach [here](#) and [here](#).

## Question

Can someone explain the various "Affiliation" sections of the ORCID record please. What are they and why should my university write to them?

## Answer

You can read about this at <https://info.orcid.org/documentation/integration-guide/admin-guide-to-affiliations/>

## Question

When are you going to publish the new financial model - new fees for consortium?

## Answer

We expect our board to sign off on the changes at their May 2022 meeting.

# Q&A

## Question

I am very curious about the PID connection infrastructure. Is there documentation or user stories that are being evaluated for those connections?

## Answer

We are working with our PID infrastructure partners (Crossref, Datacite, ROR) to develop materials, including documentation and user stories. In the meantime, this [presentation](#) might be interesting to you!

## Question

Are there clear concise guidelines regarding who may register for an ORCID-ID? Or, is ORCID open to everyone?

## Answer

Anyone who participates in research, scholarship, or innovation can register an ORCID iD for themselves free of charge. ([support article](#))