ORCID US Outreach Planning Guide for Research Institutions

The benefits and mission of ORCID (Open Researcher & Contributor Identifier) are best achieved when organizations *and* individuals are participating in the ORCID ecosystem. Organizations can participate by integrating ORCID into their systems and workflows, while individuals must:

1. Register for their ORCID iD
2. Populate their ORCID record with data
3. Authorize permission for organizations to connect with their ORCID record via organizational system integrations
4. Use their ORCID iD whenever possible

This guide is designed to help employees at ORCID US Community research institutions plan and prepare for conducting ORCID outreach and education to encourage researchers to participate in ORCID.

Outreach Planning Checklist

Key Stakeholder Support
- ❏ Identify key stakeholders within your organization
    - ❏ Do they know about ORCID? Do they understand the value of ORCID?
- ❏ Work with internal stakeholders to promote ORCID to researchers

Outreach Leaders
- ❏ Identify who will take the lead with ORCID outreach

ORCID 101
- ❏ Educate yourself and others about ORCID

Messaging & Custom ORCID Promotional Materials
- ❏ Identify & use messaging that will resonate with your researchers

Outreach & Education Strategies
- ❏ Select a variety of outreach and education strategies to pursue:
    - ❏ Consult ORCID's Outreach Resources & Communications Toolkit as a framework for getting started
    - ❏ Draw attention to ORCID
    - ❏ Start with a pilot group
    - ❏ Create local online space(s) with information about ORCID
    - ❏ Include ORCID in larger training topics and events
    - ❏ Offer ORCID help in one-on-one appointments or office hours
    - ❏ Use incentives to encourage ORCID registration

Share with the Community
- ❏ Share your experience with the wider community

Key Stakeholder Support

❏ Identify key stakeholders within your organization
    ❏ Do they know about ORCID? Do they understand the value of ORCID?
❏ Work with internal stakeholders to promote ORCID to researchers

To get the most value from ORCID, support and encouragement from administrative stakeholders is key. Partnering with other campus units can also help to amplify the ORCID message. To get the conversation started, see:
- ORCID Research Infographic
- Value of ORCID for Institutions one-pager for administrators
- Boston College's Provost Letter to Faculty

Other ideas:
- Consider working with the Office of Research to speak about ORCID at a town hall meeting
- Does your organization value supporting researchers from diverse communities? ORCID is a resource for fostering diversity and inclusion around identity and names, as ORCID iDs remain persistent despite changes in name or the use of multiple names over time - see Virginia Commonwealth University case study
- Visit the ORCID US Planning Guide for more insight on stakeholder support

Outreach Leaders

❏ Identify who will take the lead with ORCID outreach

As outlined in the ORCID US Planning Guide, ORCID can benefit multiple campus units, so it's a good idea to coordinate and set roles and expectations around which units and individuals are responsible for ORCID outreach. Consider the following suggestions:
- Form a cross-campus ORCID committee to plan, strategize, and streamline ORCID efforts
  - Example: Florida State University
- Create an ORCID outreach group within the library to coordinate and plan ORCID outreach and education in partnership with other units across campus; library staff are often in a unique position to help researchers get oriented with ORCID and can leverage their established networks and liaisons to reach faculty and students
  - Example: University of North Carolina, Chapel Hill
- Designate at least one individual as "point person" for ORCID questions and activities
- Hire one or more student workers to help with ORCID outreach planning, marketing, and other activities

ORCID 101

❏ Educate yourself and others about ORCID

To expedite getting the word out about ORCID, hold a workshop for outreach leaders and staff, such as liaison librarians, that covers core competencies for ORCID so they can pass knowledge on to researchers.

- The ORCID 101 slide deck template and speaker notes can be used to get started for training the trainer or educating researchers (make a copy or download the slides to customize your own deck)
- Customize the "ORCID for Researchers" flier template to create a handout of ORCID basics
- FYI - ORCID has a sandbox environment at https://sandbox.orcid.org/ where you can create fake ORCID records for demonstration purposes - learn more about the ORCID sandbox

Important points to cover when teaching researchers about ORCID (as seen in the ORCID 101 slide deck template):

- What is ORCID? ORCID is:
    - ...a persistent unique identifier that helps to distinguish you from other researchers, especially those who share your same name
    - ...free to register and can connect you with your affiliations and contributions throughout your career, despite changes in name, location, job, discipline, etc.
    - ...used across the globe in multiple languages
    - ...not for profit, data is not sold, and individuals have full control over their data and privacy
- After an initial time investment to set up your ORCID record, you can save time later by using your ORCID iD to:
    - Sign in to various systems (journal article submission, grant application, research information systems, etc.)
    - Transfer your information to employers, funders, and publishers via ORCID
    - Allow "trusted parties" (organizations that you are affiliated with) to add relevant info, such as newly published articles, to your ORCID record for you
    - Use the "print view" to easily and quickly create a CV or resume
- ORCID is useful for tracking all manner of contributions in all disciplines, not just publications and not just in the sciences. For example, when adding a work to an ORCID record, there is an option specifically for "Artistic/Performance." ORCID is working on expanding the community to include an even more diverse representation of works
- ORCID is used by major research institutions, publishers, and funders across the globe:
    - Publishers requiring ORCID
    - Funders requiring ORCID
    - US Research Institutions using ORCID
- To benefit from ORCID, individuals need to:
    - Register for ORCID iD, set visibility (Note: email is set to private by default)
    - Populate biographical information
    - Use "search and link wizards" to add funding and works information
        - When adding works manually, try to always include a DOI (to prevent duplicates if the same work is added by a publisher or other trusted party later on)

- If affiliated organization(s) have ORCID integrations, use their system(s) to authorize them as a [trusted organization](#)
    - If your organization has ORCID integrated into one or more campus systems, now is the time to suggest that individuals authorize campus systems to connect with their ORCID iD record
- When adding institutional affiliations (employment and education) manually, start typing the institution name and if possible, use the dropdown menu to add the institution name (this will make the Ringgold and/or GRID ID appear in the ORCID record)
- Fill in any additional information (Note: the more complete an ORCID record is, the better it will work to benefit both the researcher and the institution)

Messaging & Custom ORCID Promotional Materials

❏ Identify & use messaging that will resonate with your researchers

ORCID offers a number of potential [benefits to individual researchers](#), and different messages will resonate with different audiences depending on what matters most to them. Focus on finding your local hook and what will work best for reaching your researchers. Consider the following when creating your own localized ORCID messaging:

- Basic resources for individual researchers:
    - "[Value of ORCID for Individuals](#)" one-pager
    - [ORCID 101 for Individuals](#)
- As a researcher, ORCID allows you to:
    - Distinguish yourself from other researchers
    - Manage your identity, despite changes in name, gender, profession, institution
    - Ensure that you are accurately linked with your research, contributions, & affiliations, to get credit for your work
    - Improve the visibility of your contributions
    - Save time on repetitive data entry for funding, publishing, & research reporting workflows
    - Keep track of all of your affiliations & contributions in an interoperable, trustworthy platform throughout your career regardless of changes in name, institution, & discipline
- If your institution has integrated ORCID with one or more systems, researchers can "unlock" additional library, profiling, or reporting services when they connect their ORCID iD with your systems
    - Provide documentation showing researchers where to go/how to connect their ORCID iD with your system(s)
        - Example: [North Carolina State University](#)
        - Example: [University of Texas Southwestern Medical Center](#)
        - Example: [University of Iowa](#)
- Emphasize publishers' and funders' use of ORCID
    - Show researchers journals or publishers in their discipline that use ORCID - see [list of publishers supporting ORCID](#)

- ■ Example: [Temple University ORCID postcard featuring publishers](#)
- ■ Example: [Indiana University, Bloomington list of journals by discipline](#) indicating which use ORCID
  - ○ Show researchers potential funders in their discipline that use ORCID - see [list of funders supporting ORCID](#)
- ● Point out academic and professional societies supporting ORCID by discipline - see [list of US societies and associations supporting ORCID](#)
- ● Customize the ["ORCID for Researchers" flier template](#) to create a handout with ORCID basics
- ● See custom promotional materials from ORCID US Community member institutions
  - ○ Example postcard: [Temple University](#)
  - ○ Example flier: [North Carolina State University](#)
  - ○ Example flier: [University of Wisconsin, Madison](#)
  - ○ Example bookmark: [University of Texas, Arlington](#)
  - ○ Example door hanger: [University of Texas, Arlington](#)
  - ○ Example poster: [Temple University](#)

Outreach & Education Strategies

- ❏ Select a variety of outreach and education strategies to pursue

Remember that ORCID iD records must be created by individual researchers, as per ORCID's [Opt-in policy](#) (institutions can not create ORCID iDs for researchers). Even if ORCID is mandated at your institution, it will likely take time and iterative effort to reach full compliance.

Ideas for ORCID outreach have been gathered from across the ORCID US Community below. Mix and match any of the following ideas to meet ORCID outreach needs in your local context:

- ❏ **Consult ORCID's [Outreach Resources & Communications Toolkit](#) as a framework for getting started**

- ❏ **Draw attention to ORCID**
  - ● Use ORCID screensavers and desktop backgrounds on research computers
    - ○ Download: [ORCID E-Poster: Network Background](#)
    - ○ Download: [ORCID E-Poster: Orchid Background](#)
  - ● Set up a pop-up booth in the library or popular areas with information about ORCID
    - ○ Example: [University of California, San Diego](#)
    - ○ Example: [University of Massachusetts](#)
  - ● Display ORCID fliers or banners featuring researcher testimonies
    - ○ Download: [ORCID Banner](#)
    - ○ Download: [ORCID Flier](#)
  - ● Give out ORCID bookmarks at circulation and reference desks
    - ○ Download: [ORCID Bookmark](#)

❏ **Start with a pilot group**
- Identify one or more populations to promote to first. Researchers in some disciplines may already know what ORCID is because their disciplinary journals require it, whereas others may be hearing about ORCID for the first time
  - Example: Faculty in the Medical School
  - Example: Graduate students in the Chemistry department
  - Example: All faculty and students in the School of Engineering

❏ **Create local online space(s) with information about ORCID**
- Example website: American University
- Example LibGuide: Boston College
- Example blog: Indiana University, Bloomington
- Example video: University of Nevada, Las Vegas

❏ **Include ORCID in larger training topics and events**
- New faculty orientation
- Faculty meetings
- New student orientation
- Graduate student receptions
  - Example: Indiana University, Bloomington - hire a photographer to take headshots, set up a table near the headshots line to register students for ORCID iDs, talk to students about managing their online professional presence, and encourage them to display their iD anywhere they would display their headshot
- Research competitions
  - Example: Temple University ORCID table
- Research impact workshops, notably the Research Impact Challenge
  - Example: University of Michigan - Libguide
  - Example: Brown University
  - Example: University of Oklahoma
- Research metrics and identifiers training
  - Example: ORCID workshop by Thomas Cochrane and Vickel Narayan
- Researcher profile/reputation training
  - Example: Open Science MOOC, Module 1, Task 2: "Developing your digital researcher profile"
- Research lifecycle and publishing workshops
- Research data management workshops
- Resume or CV preparation (using the ORCID "print view")
- Open Access events:
  - Example: University of Missouri pop-up booth for Open Access week
  - Example: The Catholic University of America ORCID event
  - Example: Virginia Tech downloadable booklet "Opening Knowledge: A Guide to Open Ways for Enhancing Research and Teaching" lists ORCID

- Peer Review Week events
- General library education

❏ **Offer ORCID help in one-on-one appointments or office hours**
  - See "ORCID 101" section above

❏ **Use incentives to encourage ORCID registration**
  - Prize drawing or contest for sign-ups - see ideas for special prizes
  - Free cookie, candy, or swag for signing up
    ○ Example: Baylor University cookie giveaway, "The Sweet Smell (and Taste) of Success: Incentivizing ORCID iD Sign-Ups Amongst Faculty and Graduate Students" (see slides)
  - Swag resources:
    ○ ORCID swag store at CafePress
    ○ Print-it-yourself ORCID bookmarks and ORCID fliers
    ○ Design your own swag using the ORCID iD icon and display guidelines
    ○ Make ORCID cookies to give away using the ORCID iD 3D-Printed Cookie Cutter

Share with the Community

❏ Share your experience with the wider community

The ORCID US Community has designated communication channels for sharing your ORCID experiences and materials with others:
- Members' Discussion Forum "outreach strategies" channel
- Google Drive ORCID US - Promo Materials folder
- ORCID US Exemplars (contact orcidus@lyrasis.org to have your resources added)

Related Resources

- Translating ORCID for your community
- Six ways to make your ORCID iD work for you
- Six examples of creative promotion of ORCID
- More ORCID outreach resources
- ORCID Help
- ORCID outreach and support resources webinar
- Outreach Slide Deck (Audience = individual researchers)
- Communications Slide Deck (Audience = staff who will be reaching out to individual researchers)

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