



GETTING TO KNOW OUR COMMUNITY SURVEYS, UX, AND MORE!

ORCID CONSORTIA WORKSHOP | May 20, 2019

WELCOME!

- Welcome, introductions
- Getting to know the global ORCID community (Alice Meadows)
- Getting to know the US ORCID community (Sheila Rabun)
- Q&A
- Share your own community feedback activities
- Getting to know our users (Mallory Robertson)
- Q&A
- Small group exercise
- Report back and summary (All - 10 minutes)

GETTING TO KNOW THE GLOBAL ORCID COMMUNITY

ALICE MEADOWS, DIRECTOR OF COMMUNICATIONS

 <https://orcid.org/0000-0003-2161-3781>

Our community is very diverse!



OUR DIVERSE COMMUNITY

- Individuals
 - Researchers and other contributors
 - ORCID users and non-users
- Organizations
 - Members and non-members
 - Consortia leads
- Sectors
 - Funders, publishers, research institutions
- Geographies
 - Regions, countries, languages
- Disciplines

LISTENING TO OUR COMMUNITY

Some of our tools:

- **Surveys**
- Zendesk
- iDeas Forum, API User Group
- User interviews, usability testing
- Social media
- Working groups, task forces
- Sectors
- Webinars, workshops, and other events

LISTENING TO OUR COMMUNITY

Recent surveys

- **Consortia lead survey** (Apr-May 2019)
- **Community survey** (Feb-Mar 2019)
- Funder Working Group survey (Jan-Mar 2019)
- Member survey (Sep-Nov 2018)

In progress

- Arts & Humanities Task Force survey
- Small publishers survey

DO YOU KNOW...?

Which of the following groups is most enthusiastic about ORCID?

1. Latin American/Caribbean researchers
2. Librarians
3. Interdisciplinary researchers

ANSWER: (2) NPS of 76.14

(1) = 54.83, (2) = 44.43

DO YOU KNOW...?

Which of the following disciplines are least likely to have an ORCID iD?

1. Arts/Humanities?
2. Business/Management?
3. Mathematics/Statistics?

ANSWER: (3) NPS of 76.14

(1) = 54.83, (2) = 44.43

DO YOU KNOW...?

Why researchers register for an iD?

1. To easily connect their research contributions with my name
2. To make it easier for people to find and share their work
3. To have a unique identifier that they can use throughout my career"

ANSWER: (1) 91.7% rated this very or somewhat important

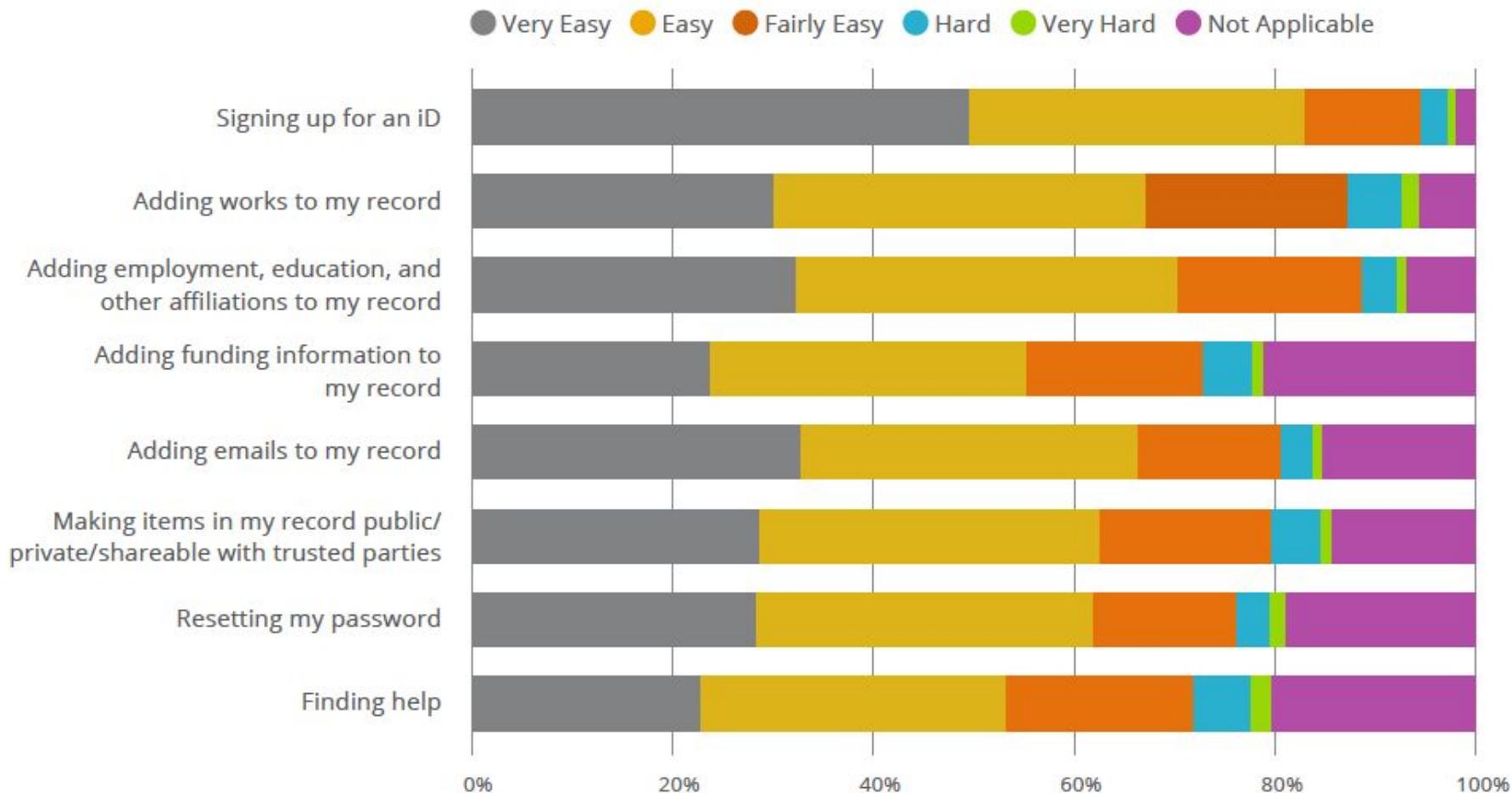
(2) =89.9%, (3) = 88.9%

WHAT USERS WANT TO ADD TO THEIR RECORD

	2019 (n=7,974)	2017 (n=1,864)	2015 (n=4,085)
1	Journal articles	Journal articles	Journal articles
2	Anything I make public with my name associated	Books (as sole author, co-author, or editor)	Books (as sole author, co-author, or editor)
3	Books and book chapters	Research data/data sets	Book contributions (as author of a chapter or entry in major reference work or other type of book)
4	Conference participation including presentations or comments	Book contributions (as author of a chapter or entry in major reference work or other type of book)	Theses or dissertations
5	Theses or dissertations	My current affiliation	My current affiliation

“Respondents in Arts & Humanities are more likely to want to connect books and book chapters (61% compared with the overall average of 48.3%), conference participation (51.5%/44%), and videos (22.6%/15.6%) to their record”

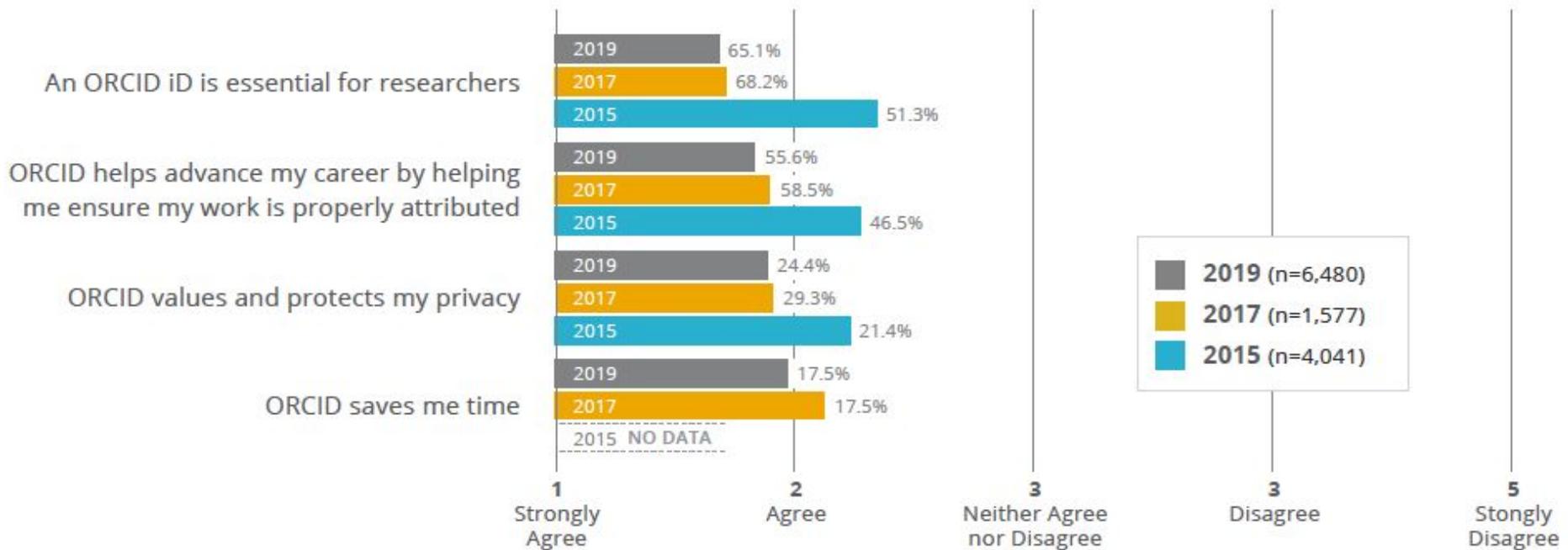
Q16. HOW EASY IS IT TO DO THE FOLLOWING ACTIVITIES ON THE ORCID REGISTRY? (n=6,227)



“undergraduates, graduate students, and early career respondents find using ORCID significantly easier than their older colleagues, with retirees experiencing the most difficulty with all activities”

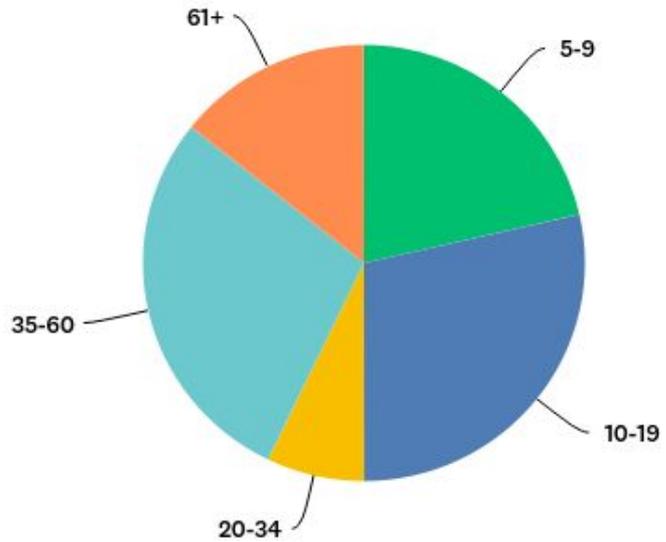
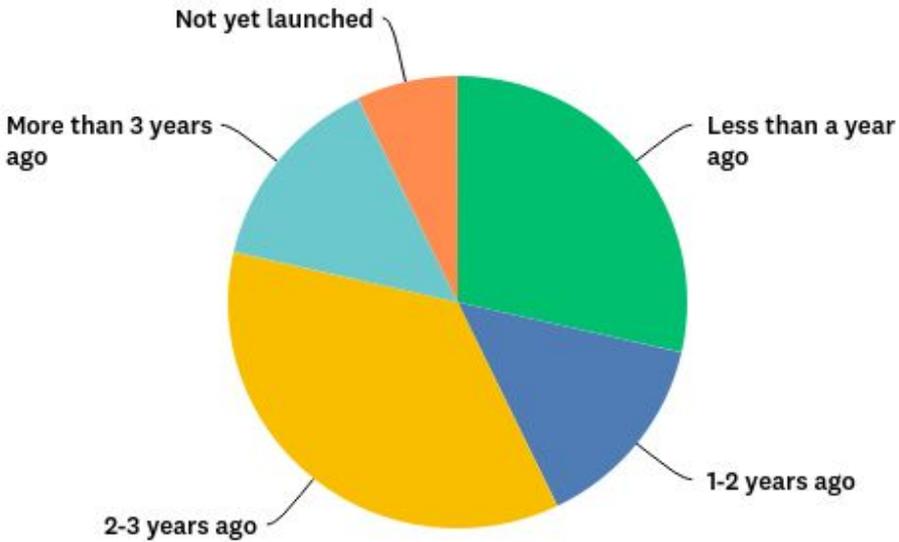
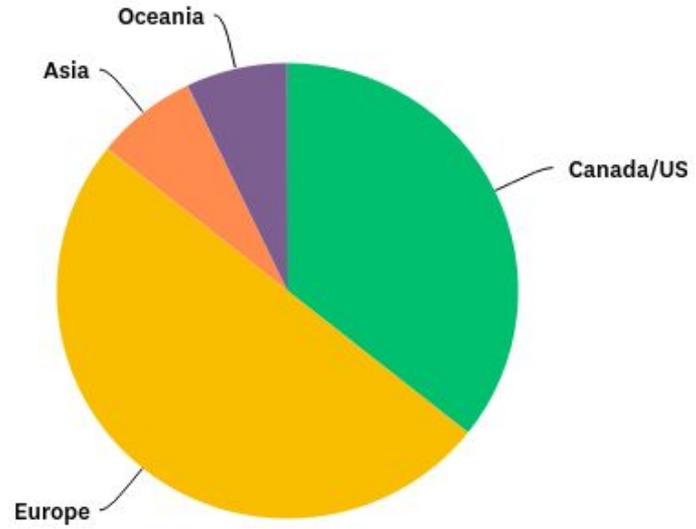
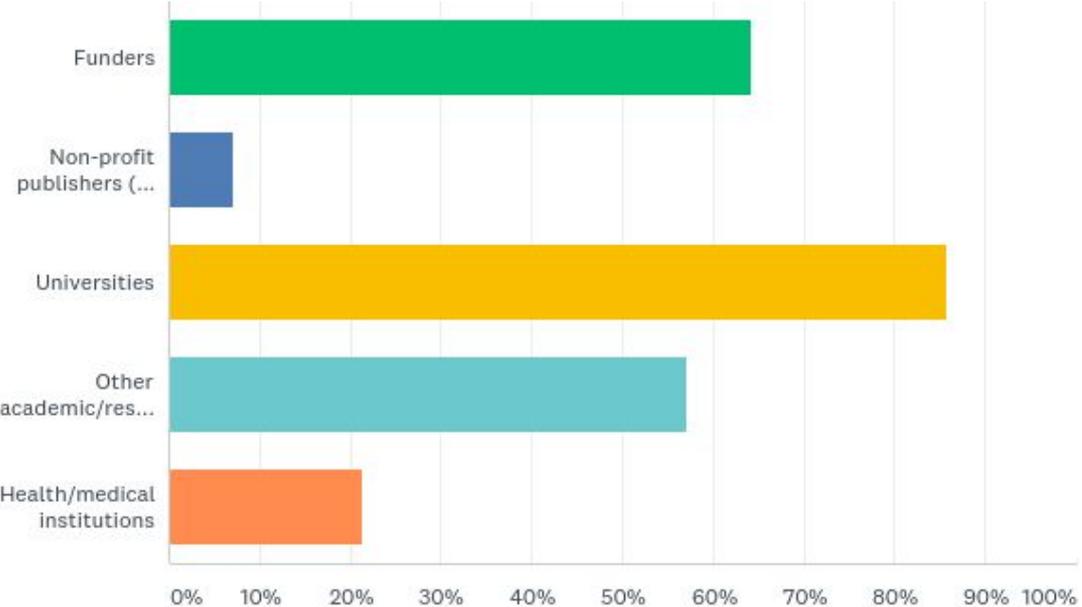


Q15. PLEASE INDICATE HOW STRONGLY YOU AGREE OR DISAGREE WITH EACH OF THE FOLLOWING STATEMENTS. (n=6,480)

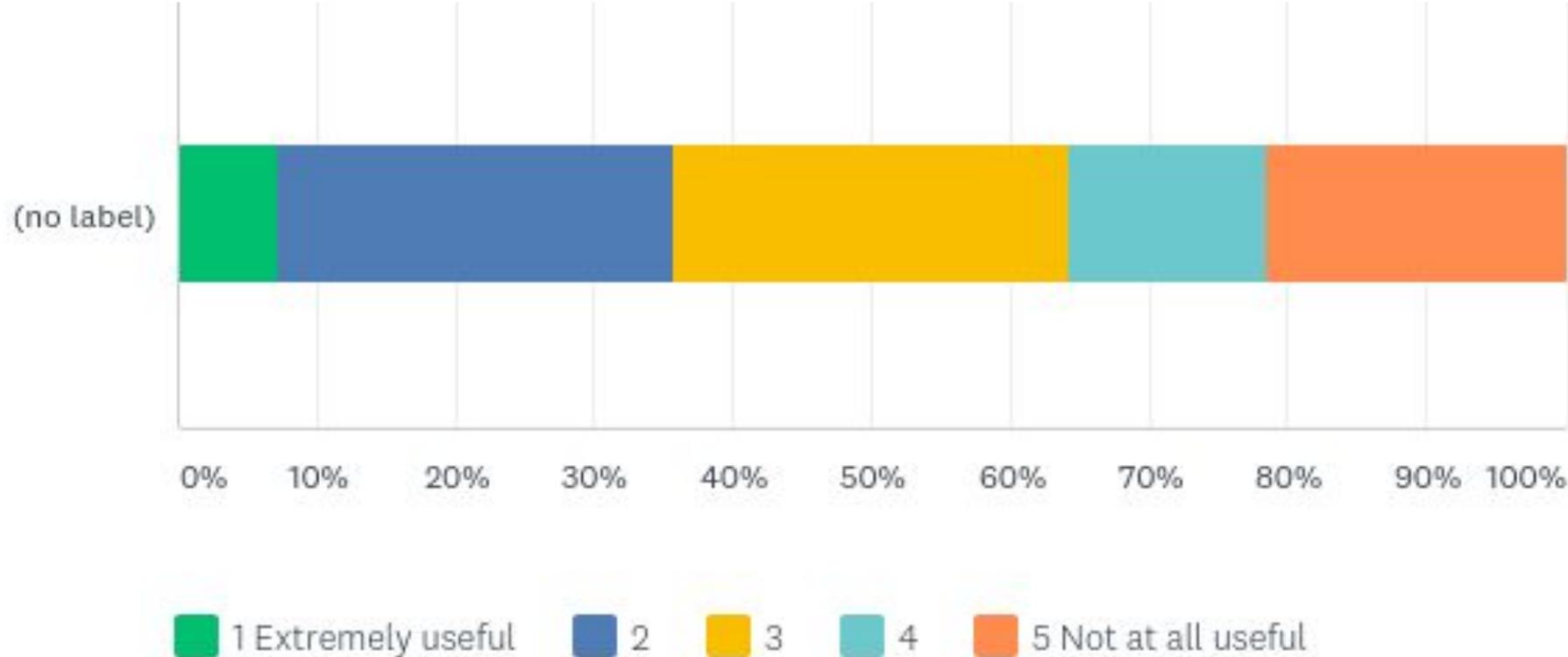


“Perceptions of the value of ORCID in 2019 are slightly higher than in 2017, and both surveys show a considerable increase compared with 2015”

LISTENING TO OUR CONSORTIA LEADS



YOU TOLD US THAT...



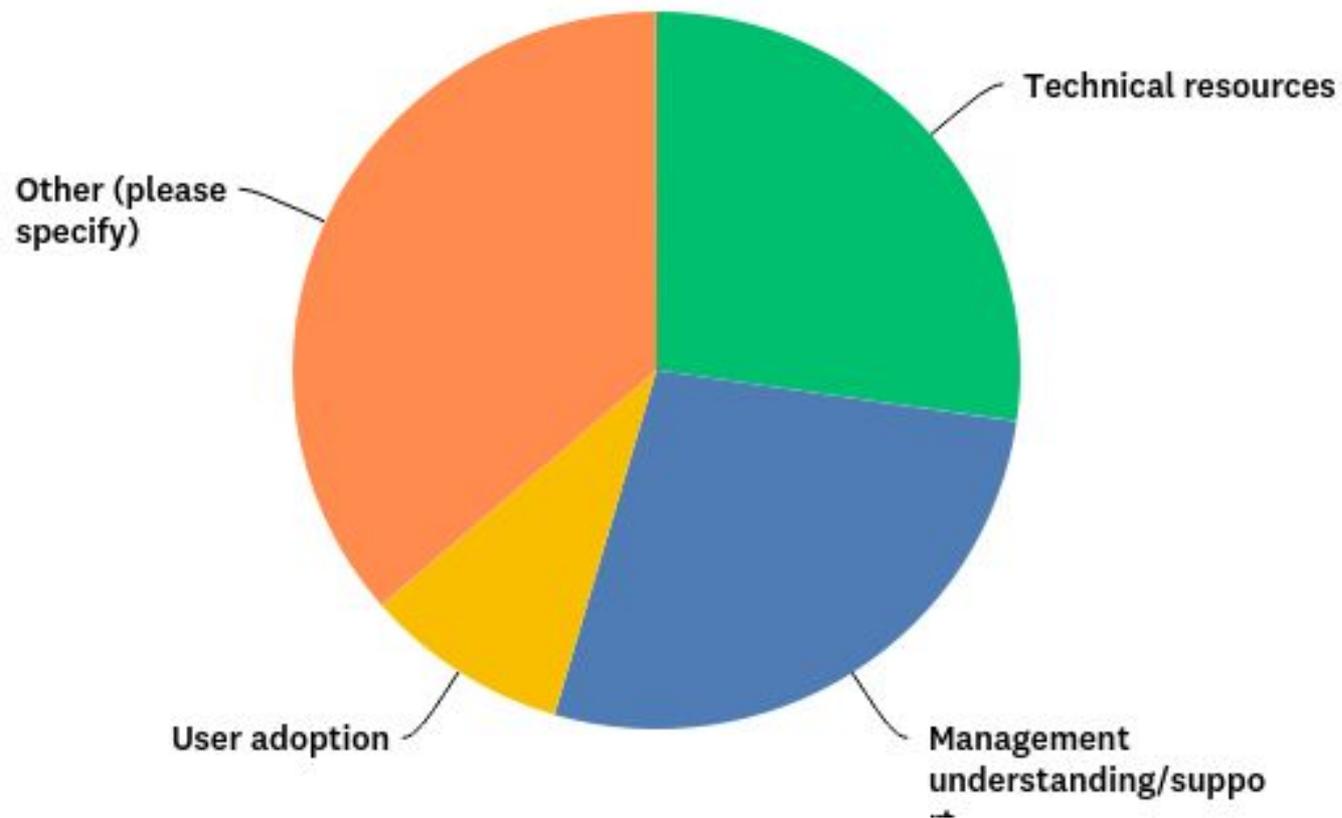
Half of you use the self service tool, but one third don't find it useful:

“Lack of functionality. CL cannot make any changes to members details.”



“Didn't know there was such a thing”

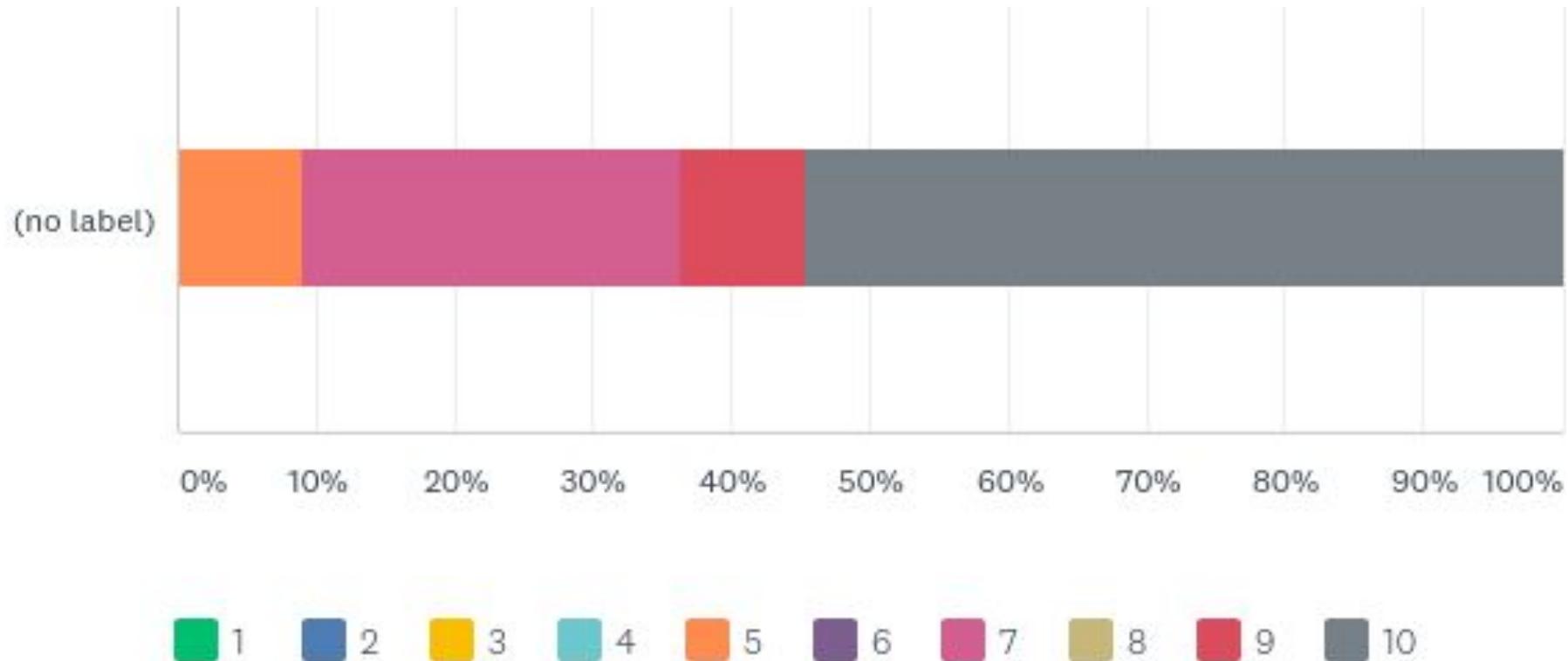
YOU TOLD US THAT...



These are the biggest challenges to ORCID implementation for your members

YOU TOLD US THAT...

You would recommend us!



Net Promoter Score: **54.55**

Thank You!





Getting to Know the ORCID US Community

Sheila Rabun, ORCID US Community Specialist

 <https://orcid.org/0000-0002-1196-6279>

May 20, 2019

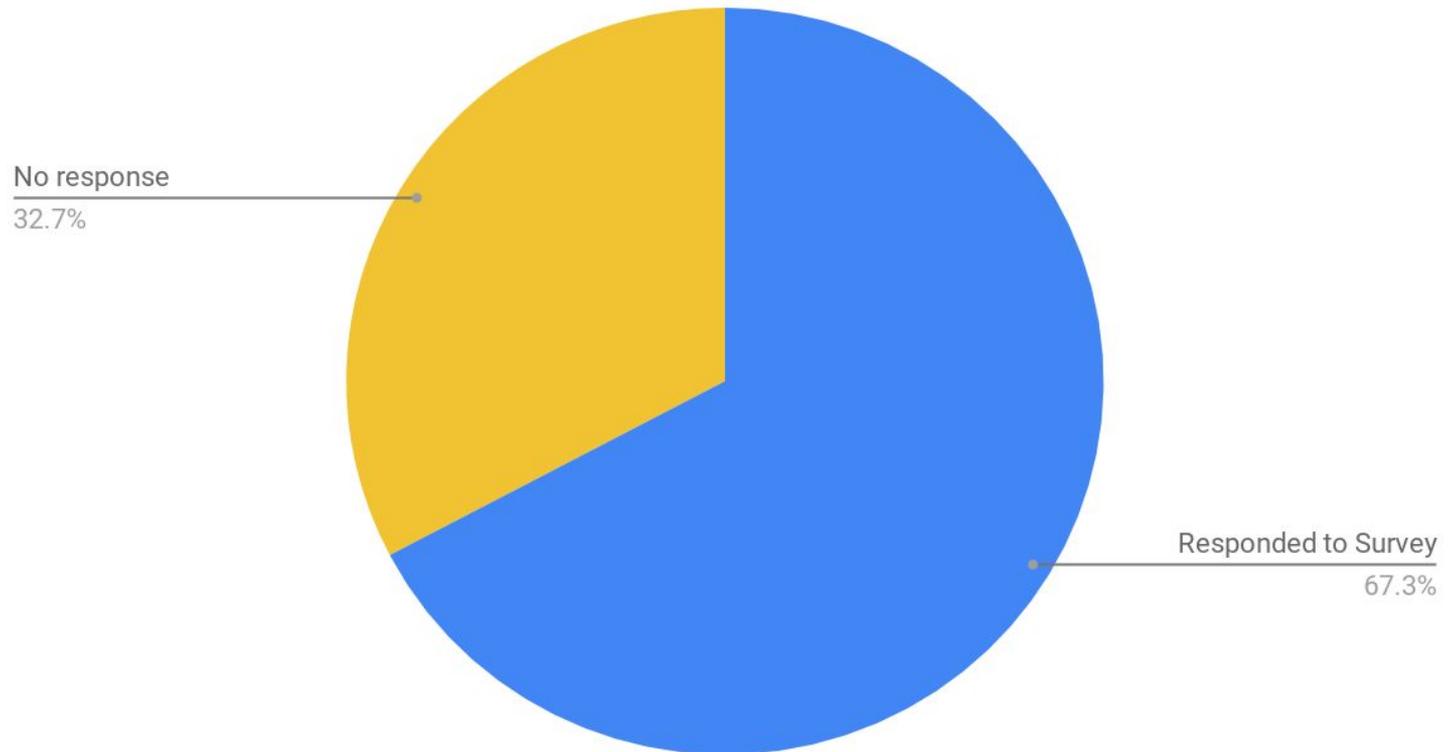


- Formed in January 2018
- National partnership for premium ORCID membership
- Any non-profit research institution can join as a member
- LYRASIS as lead

115 research institutions

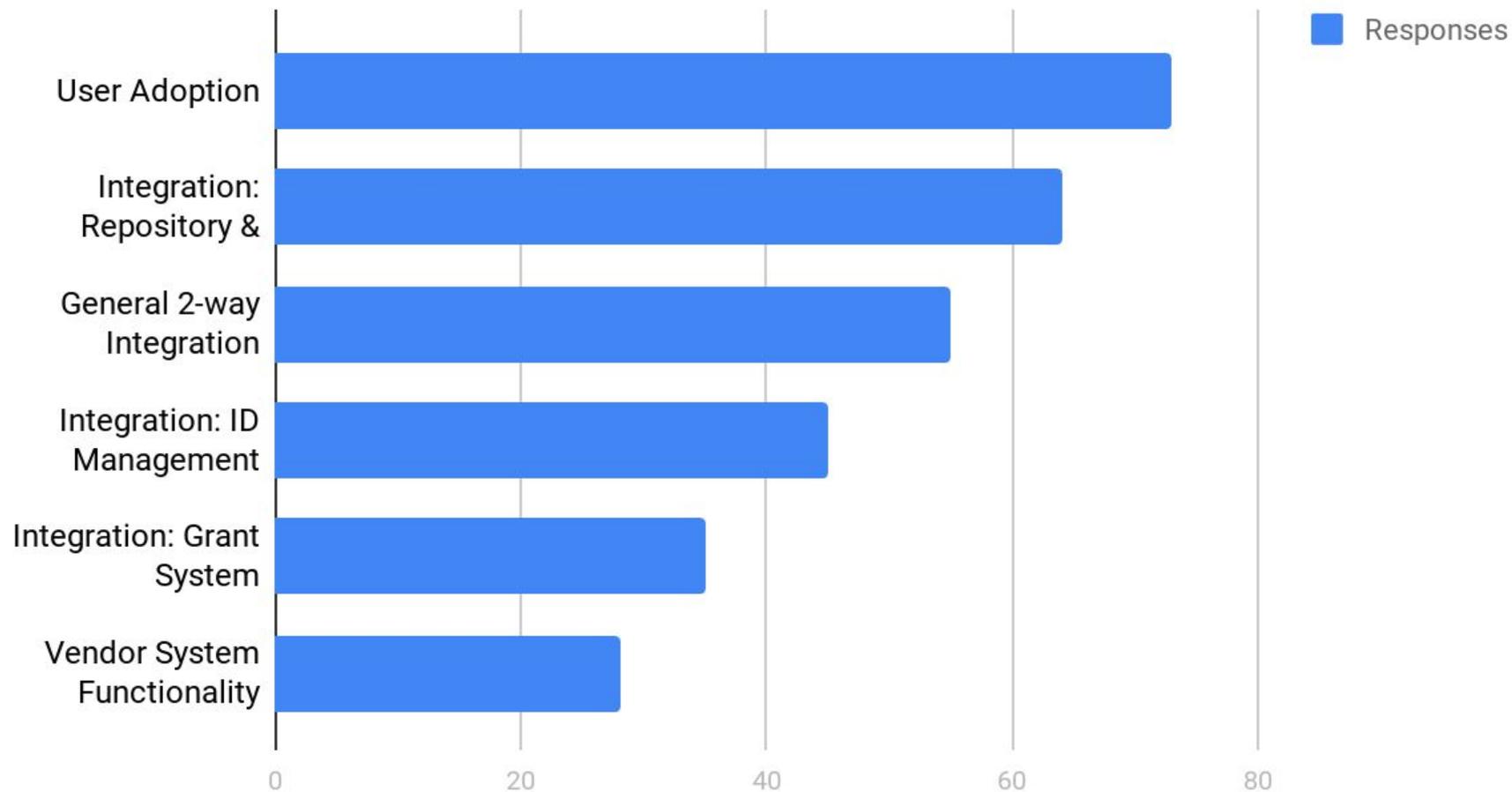


- Started working in May 2018 = 90 members
- As of Dec. 2018 = 106 members
- Year-end Survey = 88 responses from 72 institutions

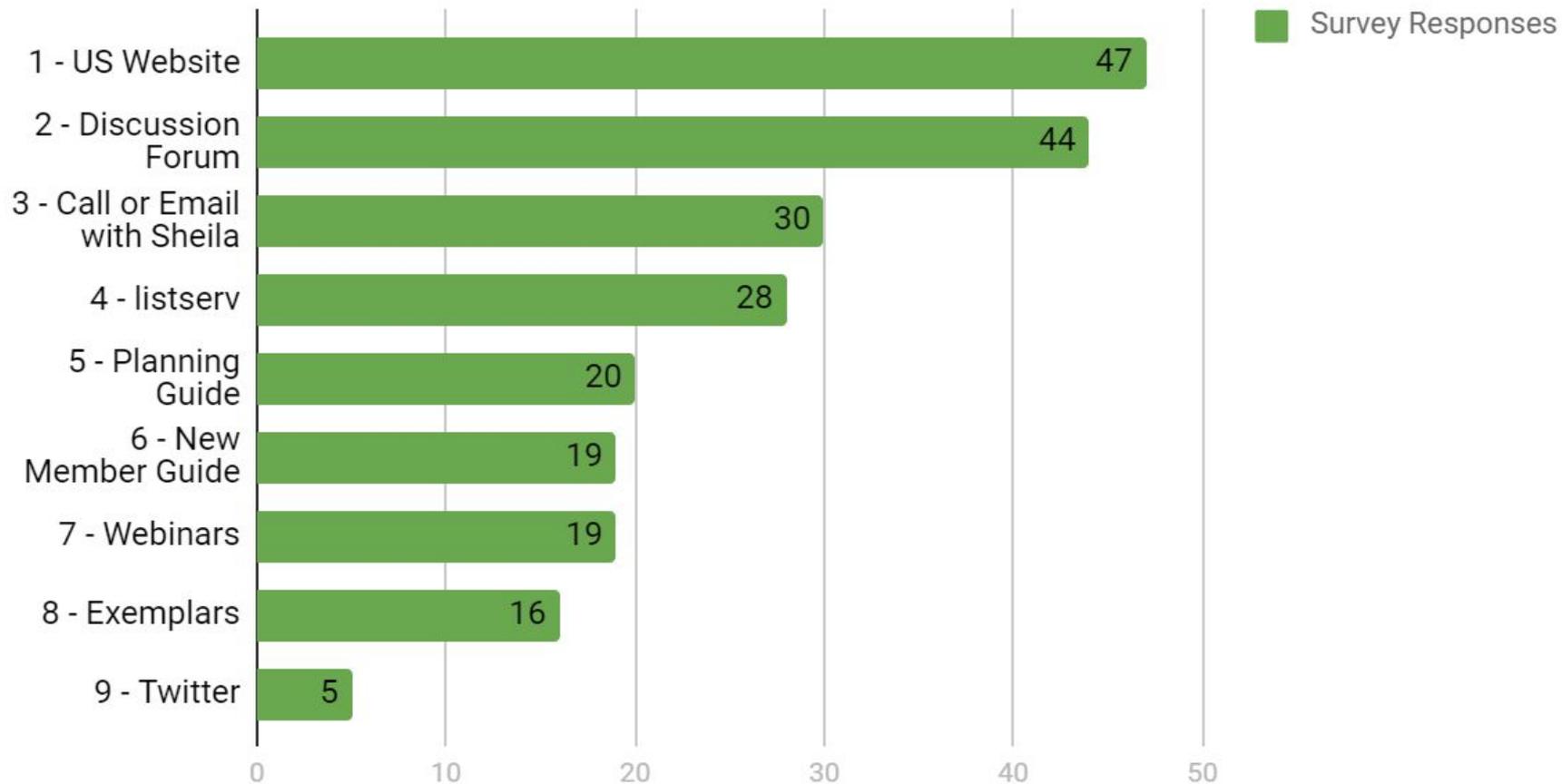


1. Institution name
2. What are the current needs around ORCID at your institution?
3. Which existing community resources have been helpful to you?
4. What potential community resources would you like to see?
5. What topics are you interested in?
6. What activities would you participate in?
7. What conferences do you generally attend?
8. What software systems are you using?

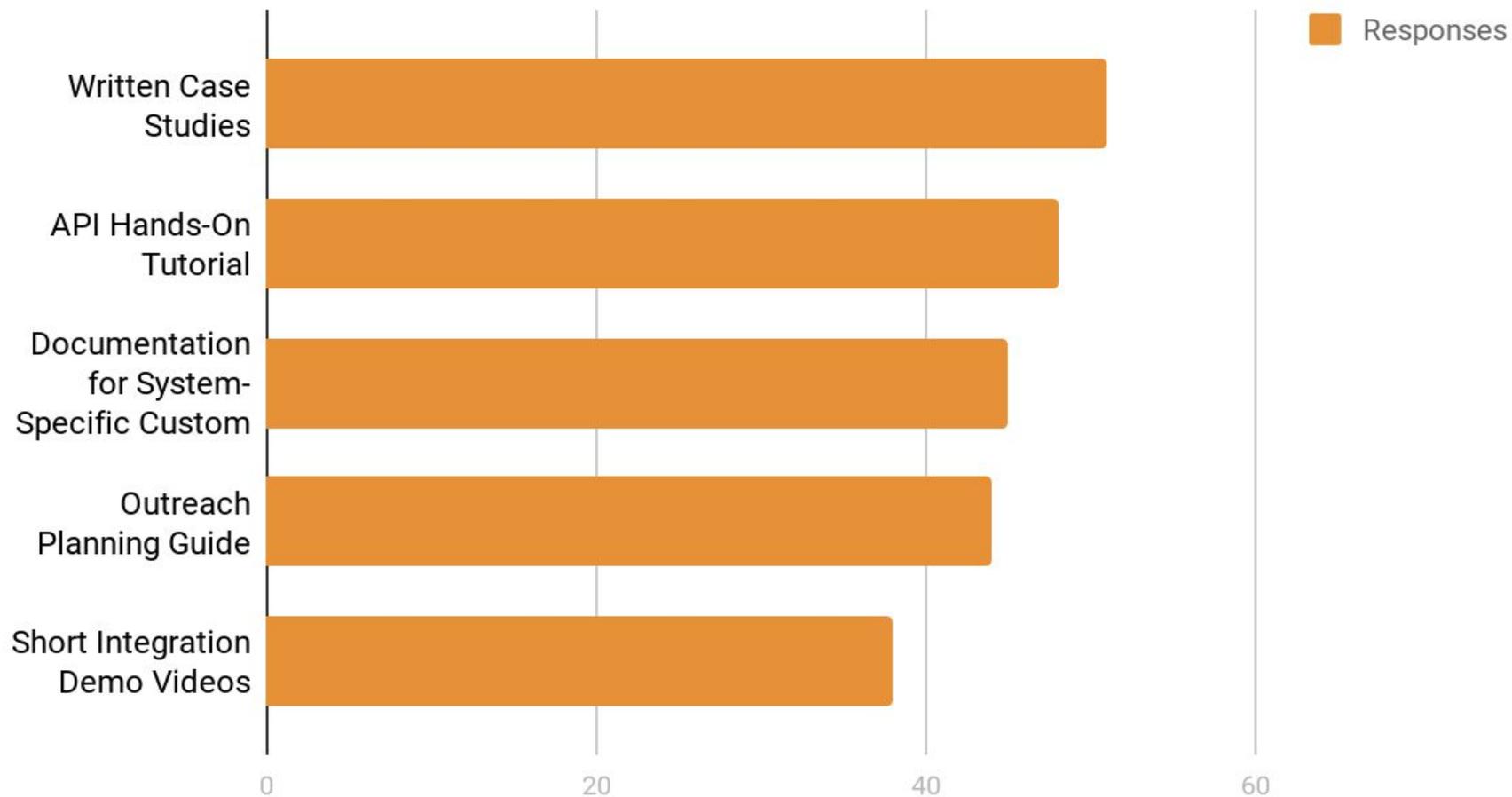
ORCID Needs



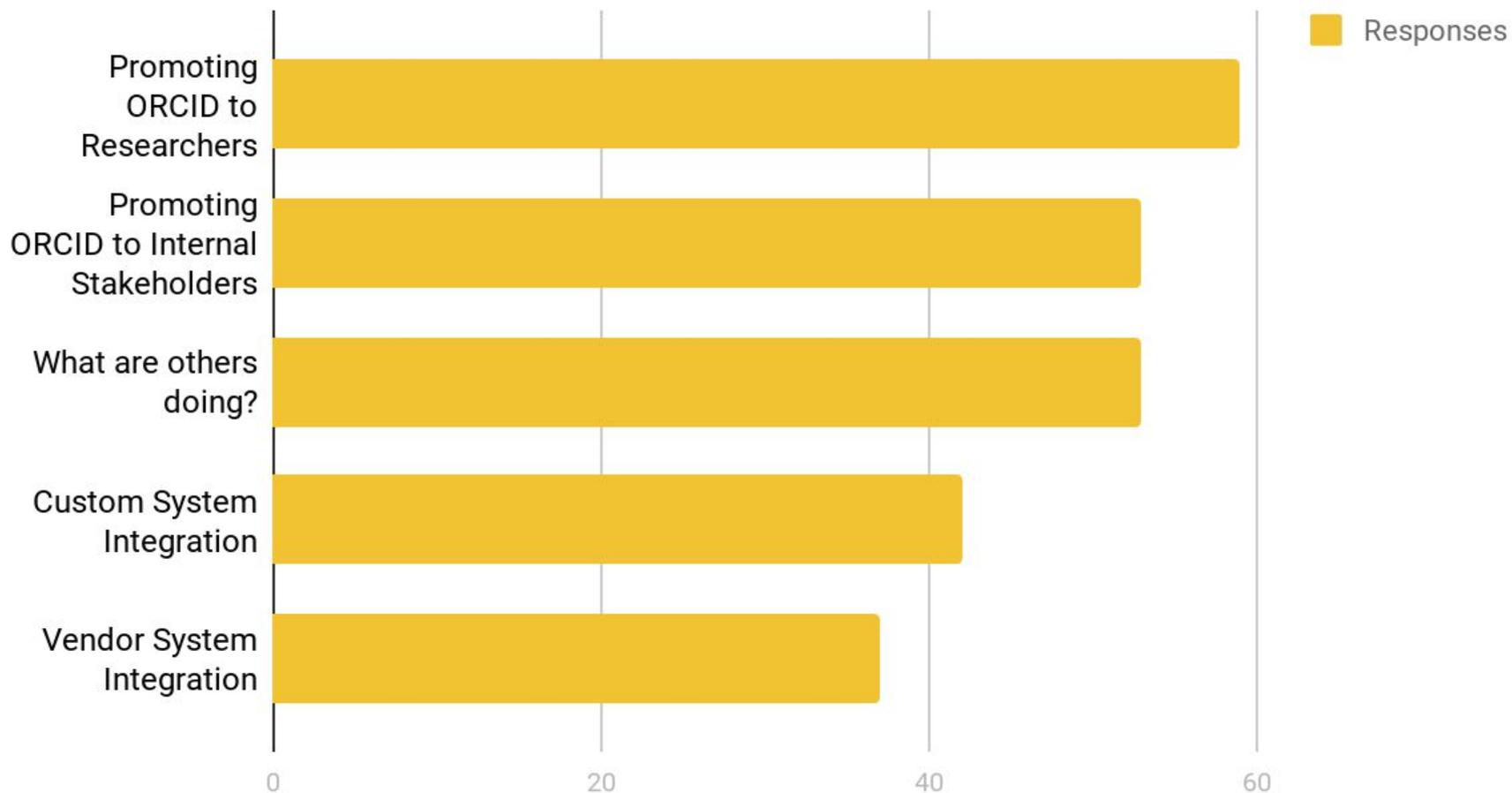
What resources are members already using?



Desired Resources

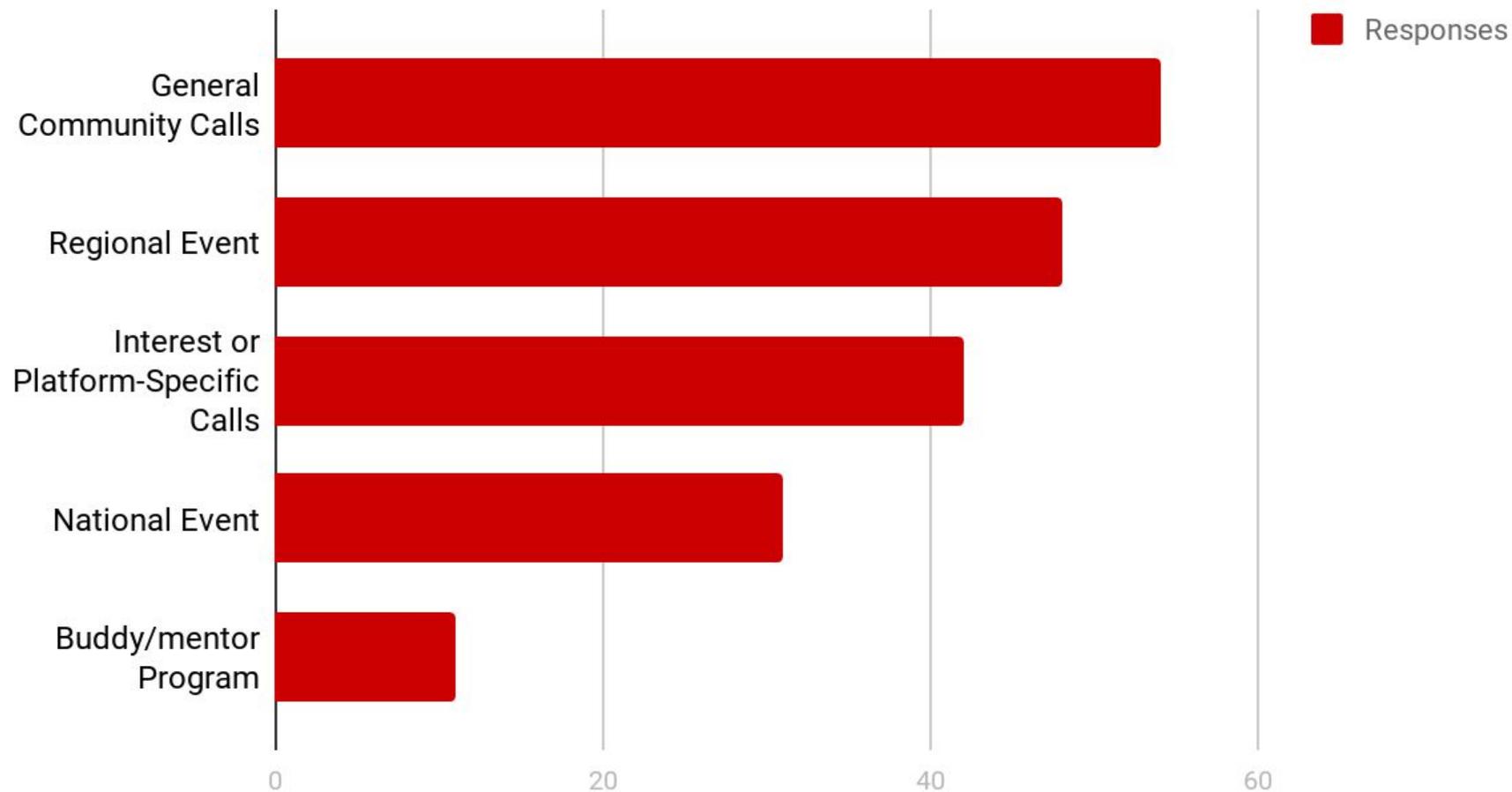


Topics of Interest:



What events/activities do members want?

Potential Activities



Where are members going?

Which of the following conferences are you likely to travel to in the next 1-2 years? Select all that apply:

- Association of College & Research Libraries (ACRL)
- American Library Assoc. (ALA)
- Digital Library Federation (DLF) Forum
- Open Repositories (OR)
- Code4Lib
- Library & Information Technology Assoc. (LITA) Forum
- Coalition of Networked Information (CNI)
- PID Palooza
- Charleston Conference
- Force11
- Other

Most Common Systems in Use:

- Wordpress (45)
- DMP Tool (43)
- DSpace (40)
- Omeka (37)
- PeopleSoft (32)
- Drupal (31)
- OJS (28)
- Proquest ETD Submission (26)
- Digital Measures (24)
- Symplectic Elements (22)
- BePress (20)

- [ORCID's] neutral position in the research lifecycle is valuable...Your collection of resources is very helpful.
- I appreciate the community discussion listserv and forum. they are helpful in understanding other institution's experience with implementation and outreach efforts.
- I have had a hard time finding more basic overviews of the implementation process & broader strategies for adoption at various kind of institutions, like flow charts.
- We are just having a really hard time finding any time to devote to ORCID

- User adoption is the most commonly shared challenge

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

- Members want to know what other members are doing

HOME / ORCID US

ORCID US

ORCID at
Cornell
University



Cornell is a founding member of ORCID, committed to the ORCID vision “where all who participate in research, scholarship, and innovation are uniquely identified and connected to their contributions across disciplines, borders, and time.”

March 25, 2019 ORCID US

ORCID &
Samvera
Institutional
Repositories at
the University
of Virginia



of their [...]

March 25, 2019 ORCID US

ORCID at
Boston
College:
Create &
Connect with
PeopleSoft



 **Outreach Strategies**
US Community Consortium

 sheilarabun US Consortium Mar 5

ORCID US Community Call - Topic: ORCID Outreach Strategies (continued)

Thurs. March 14 at 1pm-2pm EST

Hi all, next Thurs. we will have another community call to continue discussing and sharing ORCID outreach strategies. One of the most common shared challenges in our community is how to ensure that faculty and students actually register for, populate, and use their ORCID ID - so let's continue to discuss!

Agenda: Please see the [call agenda](#) for details.

Zoom Meeting: <https://zoom.us/j/195641041>
Join by phone: Find your local number: <https://zoom.us/u/acjMVRfk5Q> Meeting ID: 195 641 041



ORCID US Community Showcase webinar #3

Getting Started with ORCID

Strategic ORCID integrations require planning with multiple stakeholders, iterative technical development, and ongoing outreach to individual researchers. The [ORCID US Planning Guide](#) provides considerations for getting started. To see what other institutions have done with ORCID:

- Visit the [ORCID US Exemplars list](#)
- ORCID US member institution representatives can connect with other members in the [Members-Only Discussion Forum](#).
- Additionally, anyone may join the [ORCID US listserv](#) regardless of membership status.

Webinar Recordings



- [ORCID US Community Showcase # 3](#) (May 2, 2019. North Carolina State University and University of Texas Southwest Medical Center)
- [ORCID Benefits for Research Institutions](#) (November 1, 2018)
- [Making the Most of your ORCID Membership](#) (October 2, 2018)
- [ORCID US Community Showcase](#) (Sept. 12, 2018. University of North Carolina at Chapel Hill, New York University, Boston College, Cornell University, and the University of Virginia)
- [ORCID US Community Showcase # 2](#) (Jan. 30, 2019. University of North Texas, University of Minnesota, and University of Iowa)
- [Outreach Strategies for Promoting ORCID to Researchers](#) (April 18, 2019)

ORCID Outreach Resources

In order for institutions to benefit from ORCID, individual researchers and contributors must:

- 1) register for an ORCID iD

ORCID
Connecting Research
and Researchers

Consortium Member
Organization

ORCID US Menu

[ORCID US Membership](#)
[Technical Support](#)
[Community Resources](#)
[Get Involved](#)
[FAQ](#)



[Value of ORCID for Institutions](#)



[ORCID US Planning Guide](#)

[ORCID US Community Blog](#)



[ORCID US Exemplars](#)

[Outreach Planning Guide](#)



Thoughts? Questions?

Web orcid-us.org

Email orcidus@lyrasis.org



[@USconsortium](https://twitter.com/USconsortium)

Thank you!

GETTING TO KNOW OUR USERS

ASKING THE RIGHT QUESTIONS TO GET
ACTIONABLE FEEDBACK

MALLORY ROBERTSON

 <https://orcid.org/0000-0002-1379-7181>

When was the last time
you asked for feedback?



Simply *asking* our users if they like ORCID is a waste of time because we will always get the same response.



Asking the right questions

If we can't ask our users if they like ORCID, how do we get valuable feedback?
How can we avoid asking leading questions?



WHAT MAKES A LEADING QUESTION?

Using positive adjectives

“Would you rather use the old version, or the new improved version?”

“Would you rather use the old version, or the new version?”

“Which version would you rather use, A or B?”



WHAT MAKES A LEADING QUESTION?

Suggesting an answer

“What did you have for breakfast today? Was it eggs, or toast, or...?”

“How much easier was this for you?”

“Do you agree that signing in with your institution account is the fastest way to sign in?”



WHAT MAKES A LEADING QUESTION?

Making assumptions

“When you were struggling with resetting your password...”

“Why were you frustrated?”

A lot of leading questions made on assumptions can be avoided by asking a few clarification questions first.



A WORD ON...

Yes/No Questions

Yes/No questions may not always be leading, but we need to use them wisely. Open ended questions will almost always result in more valuable feedback.

Aim to get stories, examples, and explanations!





Receiving feedback

How do we parse and make sense of the feedback we receive?
How do we make sure we can actually do something with that feedback?

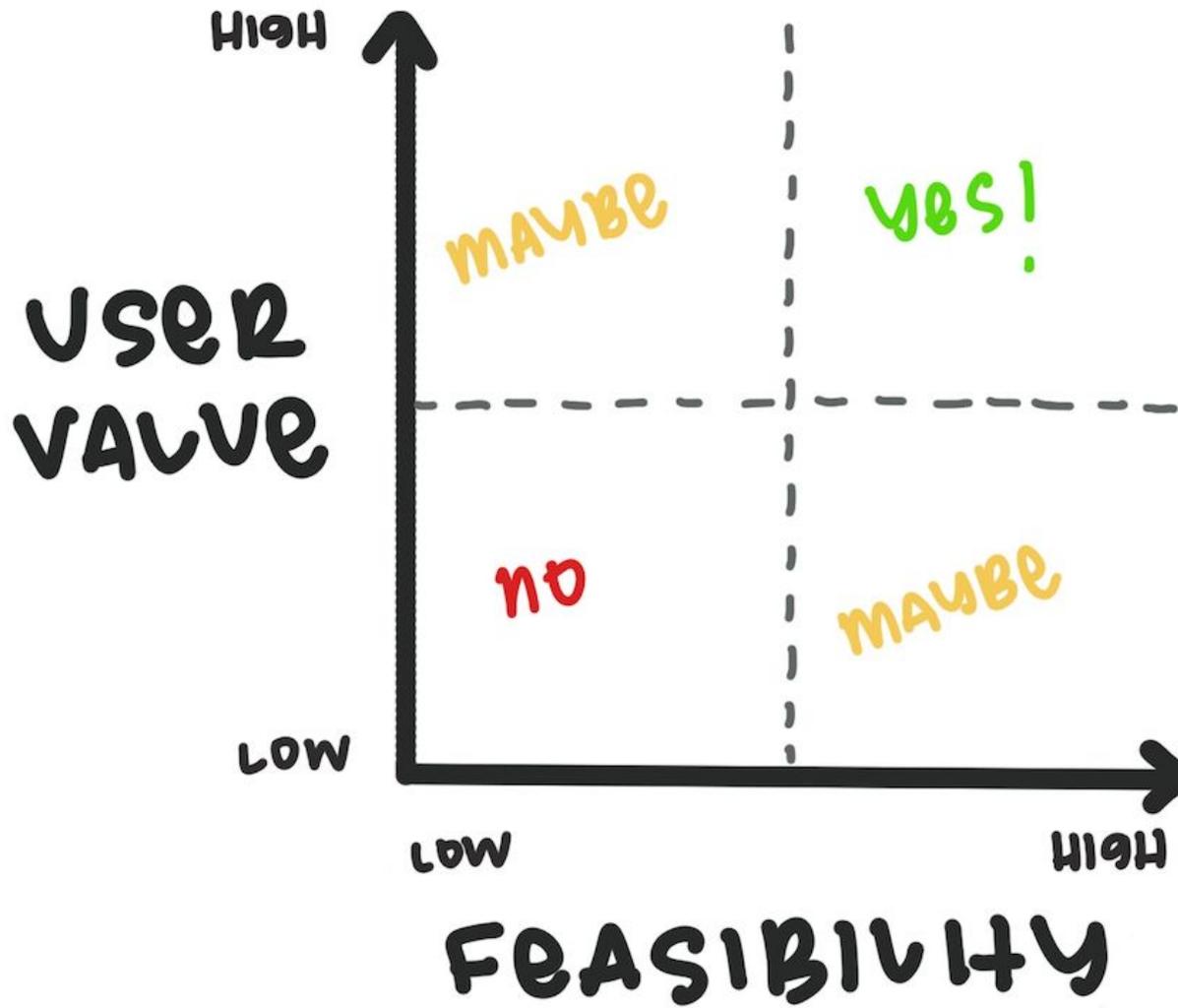
**“People don’t want quarter-inch
drills. They want quarter-inch
holes.”**

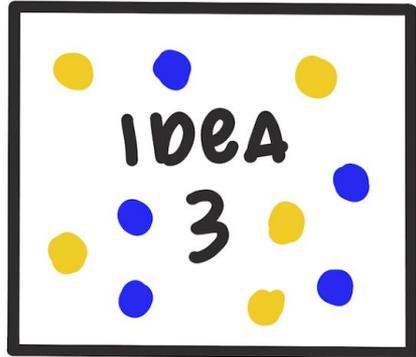
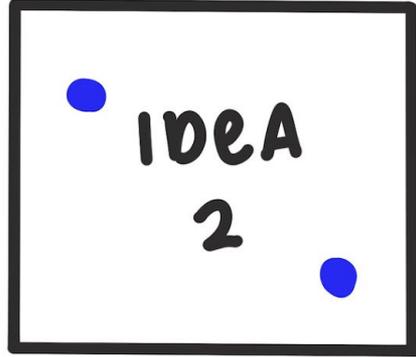
- Ted Lovett



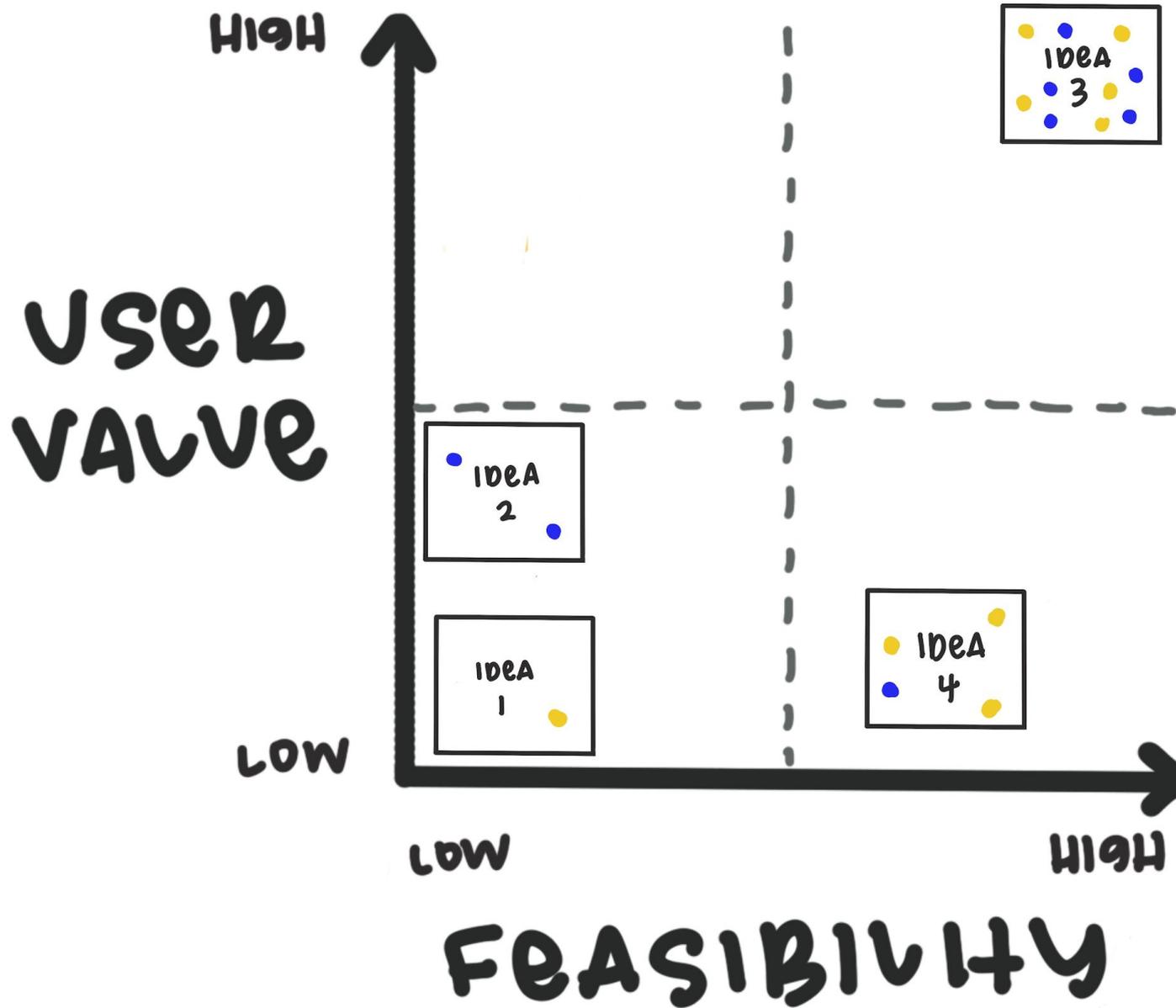
We have feedback, now
what?







● VALUE TO USER
● FEASIBILITY



Questions?

Mallory Robertson
User Experience Designer
m.robertson@orcid.org

