

JISC-ARMA Pilot Project Final Report

Kent Early ORCID

Project Summary

A project bid was successfully submitted to join the Jisc/ARMA ORCID pilot on the basis that the University of Kent was at a stage of significant development with regard to its service offer for researchers. With the implementation of KRIMSON, the new CONVERIS Current Research Information System (CRIS), the potential to integrate it with KAR, our Institutional Repository (IR) and the support in place to aid researchers in making their work as visible and impactful as possible, the opportunity to work with Jisc and ARMA in order to accelerate plans regarding ORCID was in tight synchronisation with the University’s strategic plans.

The chosen project name of ‘Kent Early ORCID’ reflected both the nature of the pilot programme and the desire to engage researchers at an early stage of their careers.

The aims of the project were:-

Project Aims	Status	Notes
To share our experiences and reflections with regard to our proposed advocacy approach for ORCID.	Complete	Blog established and Jisc/ARMA workshops attended, internal University of Kent project methodology completed and information shared both within the University of Kent and with the wider pilot project teams. Advocacy toolkit compiled and attached. (See Appendix 1).
To pilot the centrally-supported use of ORCID at the University of Kent, assess outcomes of the pilot and use this information to build on future ORCID implementation and sign-up at the	Complete	Learning from the project and on-going advocacy plans embedded within Information Services as part of BAU.

Project Aims	Status	Notes
University of Kent.		
To encourage Kent PhD students and early career researchers to sign-up for ORCID.	Complete	Audiences identified and appropriate approaches designed for each target group. Learning from the project informing future developments to continue the aims of the project as part of BAU within Information Services.
<p>To employ PhD students/early career researchers to act as ORCID champions within Academic Schools in order to quickly raise awareness of ORCID amongst an active group who will then advocate ORCID to their peers, their Schools and the wider Kent academic community on behalf of the core project team. This team will:</p> <ul style="list-style-type: none"> » Become ORCID experts » Liaise with specific Academic Schools and support services » Deliver presentations to researchers at internal meetings » Engage in 1-2-1 peer to peer advocacy with other researchers » Drive take up of the pilot ORCID service » Promote best practice in ORCID use amongst new and existing ORCID users 	Complete	The use of PhD students proved successful and it is likely to provide a model for advocacy within future project work.
To increase ORCID sign-up by University of Kent staff and students from a current standing of 92 records on the ORCID registry with a Kent email address to a target of 1000 sign ups by the end of the project.	323 sign-ups achieved during the course of the project	There are ongoing opportunities for advocacy through BAU activities, with the expectation of a significant increase in numbers over the coming months.
To investigate and pilot ORCID integration into KAR.	Complete	An ORCID field was successfully added to the IR alongside the record name and email fields ready to receive data from KRIMSON.
To incorporate the use of ORCID in the submission process for PhD e-Theses.	Complete	This was successfully completed and launched as an inherent part of the e-thesis submission process.

Project Aims	Status	Notes
To examine and report on the potential of ORCID IDs to aid effective reporting internally, back to funders such as HEFCE, HESA and other agents as applicable.	Not complete	ORCID is now successfully integrated into KAR, the approach was designed to be scalable and will be introduced into other in-house systems.
To share the experience of our CRIS and IR integrations.	Not complete	CRIS integration is not yet complete due to developmental delays. Work will continue beyond the completion of this particular project and the team are working to include all remaining objectives into the KRIMSON project scope.
To ensure ORCID integration during the installation of KRIMSON, reducing author ambiguity in the CRIS itself and during the transition of information from KRIMSON into KAR.	Not complete	

• Team

The project team included staff members from Research Services and Information Services, working in conjunction with the Graduate School and Academic School administrative staff, who assisted in the recruitment of the advocacy team.

- » Project Sponsor: Simon Kerridge (Director, Research Services)
- » Project Manager: Lesley Gould (Faculty Liaison Librarian, Information Services)
- » Project Officer: Kirsty Wallis (Library Assistant, Information Services)

The advocacy team consisted of 7 PhD students (5 from the Humanities and 2 from the Social Sciences), who were recruited from Academic Schools across the University.

• Project Approach

Major Task	Timeline										Owner
	May 2014	June 2014	July 2014	August 2014	September 2014	October 2014	November 2014	December 2014	January 2015		
Technical											
Discuss technical scope of ORCID implementation	○										SB
ORCID configuration in KRIMSON and mapping to KAR	○	○	○								RP
Create ORCID field in KAR	○	○	○								LGH
Configure ORCID into user profile/submission form for e-theses in Moodle		○	○								JB
Investigate use of ORCID in reporting functionality of KRIMSON			○	○	○						RP
Advocacy											
Create Project blog	○	○									KW
Create Advocacy plan with IS Publishing		○									LG
Create ORCID webpages		○	○								LG
Produce branded materials for advocacy		○	○								LG

Major Task	Timeline										Owner
	May 2014	June 2014	July 2014	August 2014	September 2014	October 2014	November 2014	December 2014	January 2015		
Produce presentation materials		○	○								LG
Advocacy Team											
Recruit Project Officer (PO)			○								LG
Recruit advocacy team (PhD/ECRs)				○							KW
Advocacy team training					○						KW
Advocacy team campaign						○	○	○			KW
Project Communications											
Blogging, presentations at JISC events, presentations at other events (eprints/CONVERIS users)	○	○	○	○	○	○	○	○	○	○	LG
Production of advocacy toolkit								○			KW
Other											
Sign up for ORCID Institutional Membership	○	○									LG

The project plan as detailed above offered an excellent starting point but in reality many of the original tasks were adapted following input from the Advocacy Team. Tasks often ran concurrently in order to speed up the time frame of the project due to the delayed start. An initial briefing session was arranged for those interested in joining the Team and a first meeting of recruited Advocates helped identify preferred approaches for each target audience. Regular meetings were agreed and tasks were assigned within the Team. The blog and the email box were established early in the process and proved valuable in offering extra support to staff and students signing

up for ORCID. The Advocates sent regular updates of their progress and details of their adopted approaches with evaluation and feedback on the success of each approach shared amongst the Team. Regular updates on the project were shared with all stakeholders via meetings, email and through the blog.

Outputs

The key outputs of the project can be divided into two subcategories; the physical materials used as part of the promotional activity and the measurable achievements of the teams during the project.

• Materials

A wide range of promotional materials were used as detailed in the Advocacy Toolkit (Appendix 1). Visual impact was considered important and materials were available both on and offline through the use of:

- » Posters and screens
- » Postcards and business cards
- » Branded Gifts
- » T-shirts and sweatshirts
- » Webpage and FAQ content

The Advocacy Team also delivered the ORCID message via formal presentations, informally at research team meetings and on a 1-2-1 basis as appropriate through the following mechanisms:

- » Presentations
- » Pop-up stand
- » Leafleting in departments
- » Email
- » News and social media

• Achievements

- » The total number of engaged ORCID users at the University of Kent currently stands at 323 which, while less than the targeted number stated in the original proposal is still a significant increase when compared to the target group sizes.

- » An ORCID field was successfully added to the IR alongside the record name and email fields ready to receive data from KRIMSON. The ORCID field is searchable and is included in the browse function linking out to the user's ORCID page. An ORCID field has also been created in the new e-Thesis submission system accessed through Moodle.
- » The new ORCID email box received enquiries from Academic Schools and individuals interested in receiving materials to distribute. A significant increase in enquiries about ORCID and its relationship to KAR was also recorded by the team supporting the IR.
- » There has been a significant increase in awareness of ORCID across the University, even among undergraduate students, who were not the target audience for the advocacy activity.

Lessons Learned

Lessons learned during the project were logged on the project blog at <http://blogs.kent.ac.uk/orcid> and include the following:-

- » One advantage of building the outreach plan around the knowledge and experience of the Advocates is the flexibility and innovation that can be generated by learning from the Project Team. This approach worked very effectively, and was key to the success of the project. It created some issues at the recruitment stage as it felt difficult to outline the role in any detail and predict the requirements for the job roles. In hindsight, some of the elements of the outreach work could have been predicted in the advertising of these roles as recommended in the Advocacy Toolkit.
- » Timing is key to the success of recruiting postgraduate students as advocates. Due to the delay in starting the project, it was difficult to recruit over the summer vacation as many postgraduates were away and those on campus were involved in writing up and were not looking for employment opportunities. Recruitment actually took place throughout September and into October, made more difficult by the start of the new academic year.
- » The main target groups for this project were research postgraduates, PhD students, early career researchers and academic members of staff. The Advocacy Team worked hard to identify these groups, creating targeted messages to highlight the different aspects of ORCID. Groups that were not identified for engagement, such as taught postgraduates and undergraduates were not considered by the Team. As the project ran, it became clear that the advocacy work was bringing the Team into contact with students that they were not prepared for, especially when leafleting activities and pop up stands were employed. In retrospect, developing a definite message for these groups at the outset would have been helpful, keeping a consistent message and allowing these groups to be fully included and primed for future registration with ORCID at a later date. On a positive note there has been a significant increase in awareness of ORCID across all University groups.
- » It was not anticipated that some users would find the process of registering for an ORCID difficult. After the issue was brought to the Team's attention, more effort was placed on leading users to help and guidance, and in answering questions as quickly as possible to avoid interested parties becoming

disheartened with the system. A clear awareness of the range of IT skills within the target audiences would be advantageous in future projects. The preparation of introductory guidance notes or short 'how to...' videos documenting the registration process would be recommended.

- » The use of PhD students as advocates worked very successfully on the basis that they act as mentors to other students, work closely with early career researchers and academic staff and can be flexible in their working hours allowing them to access as many groups as possible. This also allowed the Project Team to utilise their organisational knowledge ensuring the best possible access to the target audience.
- » Using a team of advocates allowed insights and input from across the University.
- » Stock responses to frequently asked questions proved invaluable and ensured consistency of message across the Team.
- » By creating a brand that is independent of the University yet complementary to the University of Kent branding, the campaign maintained an identity that became instantly recognisable yet retained its identity.
- » The loss of 2 of the initial project team members led to delays in beginning the project whilst a new project team was recruited and brought up to speed. Although a certain amount of resilience was built into the project, the loss of two staff members at the same time was unfortunate. More detailed documentation in the planning stages would have helped mitigate this delay.

● Opportunities and Possibilities

- » During the project, the advocacy team collated FAQs to help in the continued support of ORCID. These will be added to the web content and shared with staff to support the continued advocacy of ORCID beyond the end of the project.
- » The ORCID integration into the new CRIS system via the IR is still to be completed but it should help inform the inclusion of ORCID into other University systems including HR and identity management systems.
- » The further development of ORCID, its adoption by external bodies, and its possible utilisation in the next REF all present some clear avenues for future promotion as well as opportunities for streamlining internal processes around funding and research grants.

- ## Summary and Conclusions

This project was designed to meet a number of aims as well as have the overarching objective to champion engagement with ORCID by University of Kent staff. The project has been highly successful in this respect. Despite not reaching the target number of new ORCID users outlined in the original project proposal, those that have signed up for membership are engaged and enthusiastic about the concept and the other aims of the project have been met. There is a higher level of awareness of ORCID around the University and information and guidance on ORCID is readily available through a wide variety of formats and outlets. The ORCID field in the IR has raised further awareness. This project has paved the way for the advocacy of ORCID to continue at the University of Kent and provided a basis upon which to help academic staff use ORCID, the IR and the new CRIS to their full potential.