

Kent Early ORCID Advocacy Toolkit

This document serves as a starting point for an advocacy project for introducing ORCID at HEI's based on the experiences of the University of Kent. More information on the project as a whole can be found on the project blog available at: <http://blogs.kent.ac.uk/orcid>

Why Advocacy?

The choice of an advocacy project at Kent was based on three factors:

1. It was considered that the active use of an ORCID account is more likely from individuals that have chosen to create an account rather than those that have an account given to them.
2. It should limit the duplication of ORCID accounts.
3. It should highlight the relevance and potential of an ORCID ID for staff and postgraduate students.

Scope

It is important to understand the scope and the target audience of the project by considering the following questions:

- Who is the targeted audience?
- Who is not the targeted audience?
- Why are they being encouraged to sign up for an ORCID ID?
- How will they benefit from an ORCID ID?
- What are the key messages? (It may be pertinent to have different messages for multiple audience groups)
- Where are the key points of access to the targeted groups?
- Is the Institution adding ORCID ID's to any of its internal management systems and if so, whose responsibility is it to undertake and maintain these connections?

Audience

Within an HEI, the audience can be identified as academic staff, early career researchers and postgraduate research students. Experience also showed interest from within the undergraduate population, alumni and external visitors and from the University's administrative staff. Consideration of the diverse nature and experience of these groups is an important factor in the success of a project of this type. It is important to create messages and materials that will speak to as many members of the potential audience as possible without exclusion.

A wide-reaching advocacy programme has the potential to bring ORCID to the attention of groups beyond the target audience and it is important to consider how to address this to ensure consistency of message across the University. Taught postgraduates and undergraduates make up the largest percentage of the University's population and although ORCID may not be of relevance to them now, some are likely to continue their studies and become the target audience of tomorrow. One of the aims of this project was to embed an ongoing programme of advocacy for ORCID so some limited investment with these groups may well prove advantageous at a later date.

Know the product and prepare your argument carefully

In order to effectively promote ORCID to your target audience it is important to fully understand ORCID, its strengths and perceived weaknesses, where it fulfils a similar function to other tools like Academia.edu or ResearchFish and how it can impact on each defined group.

Stock responses to frequently asked questions proved invaluable and ensured consistency of message across a team of advocates as detailed below:-

Question	Example response
I haven't published anything yet, why do I need to get an ORCID?	It's never too early to start building up an online research presence. You don't just have to use it for formal publications, what about research posters or your dissertation as a starting point?
I've already got Academia, why do I need ORCID?	ORCID represents a unique identifier that you can use to tie all of your work together in one place, including linking your Academia profile directly to articles you may have written if you want to. ORCID has many features to help make your research life easier such as...
I've been publishing for 30 years; it'll take me ages to put them all up, why do I need it anyway?	ORCID has tools that allow you to harvest your works from a wide range of databases, so actually linking your work to ORCID shouldn't take that long. In general, ORCID is a great tool for organising your research as well as...

Team

At Kent, the advocacy team comprised 7 PhD students that were funded by the project. Members of Academic Staff also contributed to raising awareness by including ORCID in teaching sessions. They also distributed material on behalf of the project and allowed advocate team members time in their classes to speak about ORCID. Academic School administrative staff used social media and mailing lists and library staff also formed part of an extended advocacy team as they contribute to a researcher development programme and used this to advocate for ORCID and hand out materials.

Using a team of advocates from across the Institution has a number of benefits:

- Shifts the focus of the project away from one specific department and onto ORCID itself
- Allows insights and input on the project from across the Institution
- Gives the best possible access to the target audience
- Information is received when validated by peers and colleagues as well as by more traditional routes.

The Advocates reported that the experience had been beneficial and that they would continue to promote ORCID on an informal basis suggesting that a lack of funding need not prevent this approach.


Tips:

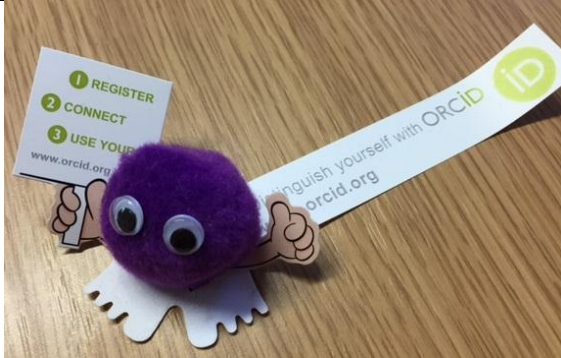
- Ensure that the advocates can relate to the target audiences. The approach at Kent identified PhD students as advocates on the basis that they act as mentors to other students, work closely with early career researchers and academic staff and they can be flexible in their working hours allowing them to access as many groups as possible.
- Build up an advocacy programme in conjunction with the team, using their knowledge of the workings of their own Academic Schools to target the project activity where they think it will be best received.

Materials

Promotional materials need to be kept simple, appropriate for all target audiences and not time-dependent. Some elements of the message will be the same for all audiences and with an advocacy project, raising awareness is the key to being able to have good conversations.

Creating a well-defined brand for ORCID outside of the corporate institutional brand gave the project real impact. It also made clear that ORCID was not a compulsory University initiative, but an external initiative that Kent was supporting. Within the project the brand was maintained by using the recognised colours and many of the materials available through ORCID but adapted by incorporating elements of the University of Kent identity. The project piloted many different approaches with the most successful being the postcard leaflets and fluffy bugs:

<p>Postcard leaflet</p> <p>Provided basic promotional points on one side, and a call to register on the other. These were very successful, and easy to create. Postcards were chosen over traditional leaflets as they are generally sturdier and less likely to get torn/screwed up and lost.</p>	 <p>The postcard leaflet is divided into two columns. The left column is titled 'Why you should get an ORCID' and lists two main points: 'It makes you unique' (connecting to work, clearing name confusion, continuous) and 'It makes your research visible' (social media, web presence, simple URL). It includes the URL www.kent.ac.uk/library/research/orcid and the University of Kent logo. The right column is titled 'Distinguish yourself' and lists three steps: 1. REGISTER for an ORCID ID, 2. CONNECT your ID to your work, and 3. USE YOUR ID in grants, publications, datasets and more. It also includes the URL www.kent.ac.uk/library/research/orcid and the University of Kent logo. The bottom of the card features a decorative border of purple fluffy bugs.</p>
<p>Business card</p> <p>Provided basic promotional points on one side, and a call to register on the other. Included both the URL of web content and an email address. Originally requested by the advocate team to prevent them having to carry stacks of leaflets at all times, the size and quality of the postcards, however, meant that these weren't as popular, although they were good for posting in pigeonholes.</p>	 <p>The business card is similar to the postcard leaflet but smaller. It features the same two columns of text and graphics. The left column highlights the benefits of ORCID, and the right column provides a three-step registration process. It includes the University of Kent logo and the URL www.kent.ac.uk/library/research/orcid. The bottom of the card also features the purple fluffy bug border.</p>

<p>Badges</p> <p>Used for awareness and handed out alongside the postcards. They were also left in social/study spaces around the University. Initially it was thought that they would be popular, as the University has had success with badges before but they weren't as popular as the bugs (below).</p>	
<p>Fluffy bugs</p> <p>Used for awareness. Known affectionately as 'Cid' the fuzzy bug is by far the most popular of the materials produced. Initially selected because they tend to persist in a work space (stuck to a monitor or pinboard) and will continue to maintain awareness. The bugs selected held small signs that allowed us to include a call to register as well as basic awareness information.</p>	

There are always opportunities to speak to groups or at events across the University. It is worth investing time in preparing presentations aimed at each target group at the outset of the project so that any opportunity can be quickly utilised. A page was also created for the institutional website covering the basic points of the campaign (<http://kent.ac.uk/library/research/orcid>; ORCIDsupport@kent.ac.uk) and offering contact details for further information via a dedicated email box. This gave the project an institutional perspective with local help as and when required. Content was adjusted in response to feedback as the project developed and FAQ's were identified and displayed throughout the duration of the project.

Tips:

- Ensure that questions can be asked easily and that any email box is constantly monitored and that all messages receive a response.
- Create a simple email address for the project and include it wherever possible on promotional materials.
- Compose standard responses to FAQ's to ensure consistency of message across the University.
 - Ensure that social media channels are appropriate and that they are monitored and maintained.
- The ORCID team were very helpful and supplied high quality versions of the logos for the materials that were produced throughout the project at the University of Kent. <http://orcid.org/trademark-and-id-display-guidelines>

Methods

Many of the ideas for outreach activities came from the Advocacy Team. These varied as they depended quite heavily on the structure of different Academic Schools and the preferred approach of each advocate but included the following: :

- Newsletters
- Social media
- Internal email lists
- Departmental meetings
- 1-2-1 meetings such as PhD progress meetings
- Reading groups & seminars
- Inductions
- Internal events, such as Open Access week
- Pop-up stands
- Leafleting

The use of trusted sources such as the Graduate School newsletter, Information Services newsfeeds or internal mailing lists was also effective. The distinctive look of the materials, posters and leaflets meant that the campaign was very well received.

Sustainability

The awareness and advocacy created by the project needs to be sustainable to ensure that the momentum continues. While an Advocacy Team was imperative to the success of the campaign, it is not sustainable long-term, and it is important to build in a level of continuity looking beyond the conclusion of the project. It is important to sustain the secondary advocacy team; those that were including ORCID in training or seminars, as this is something that can be repeated and easily maintained. The email and social media accounts will require attention moving forward and it is important to build their ongoing maintenance into business as usual.