EXPLORING THE ORCID AUSTRALIAN NATIONAL CONSORTIUM LICENSE

This session will introduce the national consortium model developed for the Australian community to streamline ORCID integration, provide centralised support and increase uptake. We will explore how institutions can engage and benefit as consortium members.
WHY THE AAF?

- Trusted national provider
- NFP
- Sustainable
- Flexible with our subscriber base (undertake or support R&E)
- We are in the business of identity management
WHY A CONSORTIUM?

- More cost effective together than alone
- Coordinated approach to implementation
- Strategic value in developing an AU community of practice
- Wide adoption to maximize benefits
- Build sustainability, long term commitment and investment
WHAT ARE THE BENEFITS FROM ORCID?

Access to full features of premium ORCID membership @ heavily reduced $.

- Premium member APIs
- the use of ORCID integration across multiple enterprise systems
- access to on boarding webinars, online resources, technical documentation and training materials
- the use of ORCID in vendor-hosted systems as well as separate internal systems
- notifications from ORCID when information is updated in an ORCID record connected to the organisation
- unlimited integrated user acceptance testing in preparation for launches and releases for different enterprise systems
WHAT ELSE?

A local technical support channel:

- access to dedicated, ORCID trained, technical support staff from the Consortium Lead
- access to on boarding webinars, online resources, technical documentation and training materials
- access to and participation in, a growing national and international community to develop best practice, knowledge and skills in research management
WHERE ARE WE NOW?

41 Australian institutions have confirmed interest

- 34 Universities
- NHMRC & ARC
- 2 Publicly Funded Research Agency
- 2 Medical Research Institutes
- 1 Consortium Lead (AAF)
**TIMEFRAMES**

- **Early Oct 2015**
  - AAF to complete due diligence process
- **Early Oct 2015**
  - ORCID Agreement provided to institutions who submitted an EOI
- **Late Oct 2015**
  - Queries regarding the Accession Agreement due
- **Mid Nov 2015**
  - Signed Accession Agreements due
- **Mid-Dec 2015**
  - Membership payments due to AAF
- **1 Jan 2016**
  - Consortium open
WHAT WILL IT ACHIEVE

- Economies of scale
- Establish an Australian ORCID Consortium with a minimum of 20 Australian institutional members (21 including Consortium Lead)
- Maximise the benefit of ORCID within each institution
- Flexibility in terms of implementation and roll-out of ORCID to members
- Members decide on timeframes and implementation options
ROLE OF THE LEAD

A mandatory requirement to have a Lead

- Provide administrative support to the Consortium;
- Manage and support the on-boarding of Consortium members;
- Be the central technical support contact to all members (Level 1); and
- Maintain Consortium documentation and technical documentation repositories.
Governance Framework
GOVERNANCE BODY

Meet face:face annually

- provide the decision mechanism for the Consortium to operate effectively and sustainably into the future.
  - Consortium Lead
  - 2 elected institutional reps from nominated members
  - An elected rep from a government funding agency
  - Elected rep at the DVC-R level
  - An elected rep from other publicly funded RO to be nominated by consortium members
AU ORCID ADVISORY GROUP

Transition from the current working group

- to provide strategic advice to the governance body, and the Consortium
- monitor and review the structure and costing of the Consortium,
- support a broader sector wide community development.
OVERVIEW OF AGREEMENT
HOW IT WORKS

Non-binding Trusted Third Party Consortium Agreement will be used to establish the Australian ORCID Consortium.

[Diagram showing ORCID linked to Member]
THE AGREEMENT

3 parts:

1. ORCID Licence Summary
2. Exhibit 3: Accession Agreement (Members sign this)
3. Appendix A: ORCID Standard Licence Agreement & Appendix B Definitions

See: www.aaf.edu.au/orcid
WHO CAN JOIN
WHO CAN JOIN

Institutions must be located in and organised under the laws of Australia, these organisations include:

- higher education
- non-profit organisations
- government research institutes and funding agencies.

If you are not sure if you are eligible to join, contact orcid@aaf.edu.au
HOW TO JOIN
HOW

1. **Sign and return the Exhibit 3: Accession Agreement (PDF)**
   - Only 1 sector wide agreement – no modifications accepted

2. **Provide details as required in the accession agreement**
   - Admin contact
   - Technical contact
   - Approval for ORCID to use your logo and name for indication of membership
   - Government or NFP status

3. **Pay Consortium Member fee (USD) + Consortium Leader fee (AUD) within 28 days**
LET’S DISCUSS
This final session will discuss how the community will be supported through the consortium model.
THE CONSORTIUM LEADER

Provide administrative support to the Consortium:

- the initial establishment of the licensing agreement (year one), the subsequent renewal (year two onwards).
- management of the billing cycle for the collection of fees from members and the payment of licensing fees.
- secretariat support to the governance body.
THE CONSORTIUM LEADER

Manage and support the on boarding of Consortium members:

- manage the membership process of joining the consortium as outlined in the Consortium agreement.
- act as the primary contact between ORCID and the members for membership enquiries.
- organise and conduct on boarding webinars as part of an ORCID training program for members.
THE CONSORTIUM LEADER

Be the central technical support contact to all members:

- Monday - Friday 8am-5pm AEST (exclusive of Queensland public holidays) Tier 1 ticket and issue management via the Host’s Service Desk. All questions received by ORCID directly from Consortium members will be re-routed to the Consortium Lead’s Service Desk.

- manage the resolution of Tier 1 technical support incidents.

- manage the escalation of Tier 2 support incidents with ORCID.

- engage with ORCID to ensure that member ORCID integrations are in accordance with ORCID guidance and stated good-practice.

- act as liaison between the Australian ORCID member community and the ORCID organisation ensuring that member interests are represented and that feedback is provided via appropriate channels to fuel improvement and innovation.
CONSORTIUM SUPPORT

Maintain consortium documentation and technical documentation repositories:

- setup and manage a web interface to facilitate sharing of plans and coordination of implementation of members.
- development and maintenance of documentation, FAQ, Q&A, online resources and collaboration tools for members.
ORCID’S ROLE

- Tier 2 incident resolution support.
- Training for the Consortium Leader tech staff,
- Weekly check-ins with the leader, assistance with planning on boarding webinars, and development of a consortium FAQ.
MEMBER’S ROLE

Undertake the implementation work

- Provide notification to the Consortium Leader when launching an integration or starting a drive to encourage user registration to enable coordination across new releases.
- If over 30,000 researchers will be asked to register in a period of less than one month, the Member will use best efforts to notify the Consortium Leader in writing at least 35 days in advance.
BE PART OF THE ACTION AND WORK FOR US
The Australian ORCID Community
LET’S BUILD IT TOGETHER

Community development and support may include:

- Website content
- Webinars
- Workshops
- Forums and roundtables

The Consortium will aim to host an annual ORCID forum. ANDS and CAUL will play a key role in facilitating the development of the community.