

The ORCID Advocacy Toolkit: towards a community-driven resource

[Mareike Wehner](#)¹, [Alastair Arthur](#)^{2*}, [Adam Vials Moore](#)³

¹University of Liverpool, ²University of Glasgow, ³Jisc

*Corresponding author: Alastair.Arthur@glasgow.ac.uk

COPYRIGHT

Copyright (c) 2025 Mareike Wehner, Alastair Arthur, Adam Vials Moore

LICENCE

This work is licensed under a Creative Commons Attribution 4.0 International License



CITE THIS ARTICLE

Wehner, M., Arthur, A., & Vials Moore, A. 2025. The ORCID Advocacy Toolkit: towards a community-driven resource. *Scottish Journal of Open Research*, 1: X. DOI: 10.36399/ag1cs624

SUBMITTED

28 February 2025

ACCEPTED

06 June 2025

PUBLISHED

07 November 2025

The Scottish Journal of Open Research is an Open Access journal published by the University of Glasgow.

Keywords

ORCID, advocacy, co-creation, community resource, open research, persistent identifiers

Abstract

This paper introduces the ORCID Advocacy Toolkit, a community-driven resource designed to support institutions in the successful adoption of ORCID iDs. Recognising that effective advocacy requires both clear messaging and practical materials, the Advocacy Toolkit was developed through a collaborative, co-creation process involving librarians, research managers, and consortium members. Early stages focused on gathering existing advocacy content—such as templates, policy documents, and communication strategies—and identifying gaps in coverage. By hosting writing sprints and inviting broad participation, the project drew on diverse expertise to build a dynamic Wikibook suitable for institutions with varying needs and levels of ORCID experience. The establishment of an Editorial Board ensures ongoing updates, structured contributions, and alignment with emerging community requirements. In addition to highlighting common barriers to ORCID uptake—like low awareness or fragmented communication—the paper examines how flexible frameworks and peer-driven content can help overcome these challenges. Ultimately, the ORCID Advocacy Toolkit champions the principle of “from the community, for the community”, providing a sustainable, evolving resource that strengthens the open research ecosystem by supporting researcher recognition, knowledge sharing, and global collaboration.

Introduction

The importance of equity, transparency and accessibility hardly needs to be stressed to an open-research-interested audience. They are some of the core principles that allow for academic growth in a sustainable way. It also is no news that there are many tools that support both researchers and supporting staff in achieving open research goals more easily, one category being persistent identifiers to solidify the identification and acknowledgment of research and its outputs.

One of those tools is ORCID ([ORCID 2024](#)), which plays a crucial part in researcher recognition and knowledge sharing by providing personal persistent identifiers ([Meadows et al 2019](#)) called ORCID iDs. ORCID iDs are unique 16-character alphanumeric strings (including a final checksum digit for validation). These are assigned to a researcher much like an ISBN is assigned to one version of a book, or a DOI identifies one specific digital object like a research paper. The use of ORCID iDs is accepted as good practice worldwide, and many systems in the Higher Education and publishing environment strongly advise or even mandate the use of them. ORCID iDs have the benefit of clearly identifying a researcher by their number, not just their name which might not be unique. When research gets published, for example, attaching an ORCID iD to the author makes the claiming on other research systems much more straight-forward than just using their name, and a change of name can also easily be navigated without confusion or misattribution. The ORCID platform also offers an easy-to-navigate interface that offers almost a clearly structured CV for a researcher. According to the ORCID organisation ([ORCID 2024](#)), these identifiers solve persistent name ambiguity problems in scholarly communications and bring several benefits including:

- Distinguish researchers from others with similar names
- Automatic linking of research outputs to correct profiles
- Persistent recognition across career changes, name changes, and institutional moves
- Reduced administrative burden through automated data exchange
- Enhanced discoverability of research across systems and disciplines

However, like many other resources, there is a lot to know about ORCID, and in order to successfully adopt ORCID across an institution, clear guidance, help with advocacy, and practical resources are needed. Making sure stakeholders understand the benefits in an appropriate and succinct way, whilst ensuring that busy researchers feel supported, are only two of the many tasks a librarian or research manager might face when planning an advocacy campaign. This is where the ORCID Advocacy Toolkit comes in.

What is the ORCID Advocacy Toolkit?

The principle of the ORCID Advocacy Toolkit ([ORCID 2022](#)) is simple: Support those who advocate for the adoption of ORCID in their institution with practical advice and resources. In other words, the Toolkit is designed to support ORCID advocacy by providing tailored resources and practical templates to help institutions engage effectively.

As a community-driven tool, those who have done advocacy campaigns for ORCID, or indeed other tools or projects with transferrable guidance, are invited to contribute, be it with case studies, templates, or general advice. The toolkit contains various resources including:

- Sample communications (email templates, newsletter text)
- Visual materials (posters, postcards, social media graphics)

- Presentation slides and workshop materials
- Case studies from different institution types
- Guidance on developing institutional ORCID policies
- Practical advice for different stakeholder groups (researchers, librarians, IT)

Hosted on Wikibooks, it is a resource that is openly available and designed to make contributing easy. The Toolkit aims to help librarians and research managers to integrate ORCID successfully in their institution, whether the goal is creating awareness, encouraging sign-up and profile maintenance, or achieving complete institutional adoption.

Background and Development

The UK ORCID Consortium ([UK ORCID Consortium 2025](#)), managed by Jisc, brings together over 100 UK research organisations to promote and support the adoption of ORCID. The idea for the ORCID Advocacy Toolkit originated in 2021 during discussions among consortium members who identified a common need for shared resources to support ORCID implementation at their institutions.

Initial co-creation experiences revealed that despite differences in institutional contexts, many advocacy challenges were remarkably similar. The consortium recognised that pooling knowledge and resources could benefit the entire community and reduce duplicated efforts across organisations.

The UK ORCID Consortium organised a workshop in 2021 focused on audience needs, which formed the foundation for resource gathering. Participants identified key stakeholders for ORCID advocacy and began collecting existing materials from member institutions to build a shared resource base.

1. Toolkit Structure and Development

Timeline of Development

- 1. Stage 1: Resource Gathering (2021)**
 - Initial workshop on audience needs
 - Collection of existing advocacy materials from consortium members
 - Identification of key stakeholder groups and messaging needs
- 2. Stage 2: Writing Sprints (2022)**
 - Creation of Wikibooks platform for collaborative development
 - Organised writing sessions with community contributions
 - Development of initial structure and content areas
- 3. Stage 3: Expansion and Refinement (2023)**
 - Addition of case studies and templates
 - Community feedback and content revision

- Growing contributor base from various institutions

4. **Stage 4: Editorial Board Formation (2024)**

- Establishment of governance structure
- Development of long-term sustainability plan
- Regular review and updating process

Why Wikibooks?

Wikibooks was selected as the hosting platform after evaluating several options based on the following criteria:

- **Open Access:** Freely available to all without subscription barriers
- **Cost:** No cost to set up, host or maintain webpages
- **Collaborative Editing:** Built-in tools for multiple contributors
- **Version Control:** Trackable history of changes
- **Familiar Format:** Most users understand wiki navigation
- **Sustainability:** Established platform with long-term stability
- **No Technical Barriers:** Low threshold for new contributors.



Fig. 1: Timeline of the ORCID Advocacy Toolkit. Credit: Adam Vials Moore.

2. Challenges and Opportunities

Implementing ORCID across an institution presents several challenges that drove the creation of the toolkit:

Common Barriers to ORCID Adoption

- **Researcher Resistance:** Many researchers see ORCID as "yet another profile" to maintain
- **Unclear Benefits:** Difficulty in articulating immediate advantages for individual researchers
- **Technical Integration:** Varying institutional systems require different implementation approaches
- **Resource Limitations:** Limited staff time and expertise for sustained advocacy campaigns

- Cross-Departmental Coordination: Need for collaboration between library, research office, and IT services.

Advantages of ORCID Implementation

The toolkit emphasises several key benefits that help advocates make a compelling case:

- Research Recognition: Ensures researchers receive proper credit for all their work
- Reduced Administrative Burden: Automates CV updates and reporting processes, auto-population of information on grant applications and manuscript submission forms
- Enhanced Discoverability: Increases visibility of research outputs across platforms
- Persistent Identity: Maintains consistent researcher identity despite institution or name changes
- Funder Compliance: Meets growing requirements from funding bodies for ORCID iDs
- Institutional Benefits: Provides improved reporting capabilities and research intelligence.

Collaborating and Co-Creation: A Difficult Path

The main challenge faced in the creation of the Toolkit has been the difficulty in attracting collaborators to creating content. Due to a variety of reasons such as time constraints and other priorities facing members of the community, finding the right approach to encourage contributions is key. To address this, several different collaborative writing options have been offered as detailed in Stage 2 above. Future alternatives would include allowing collaborators to find their own time to write, by tasking them with a particular topic by a given deadline and having editors move the content into the Wikibook.

Co-creation can be challenging with differing ideas, opinions and approaches to the structure and content of the book. With a wide variety of participants across the different sprints, no two sessions have included the same participants. However, soliciting diverse content from the community is key to the success of the Toolkit. The majority of contributors responded in meetings with the feeling that the Toolkit is well structured. To avoid any pitfalls in co-creation, an Editorial Board would allow for consistent oversight and ensuring the direction remains on course.

What the Toolkit offers

The sections of the Toolkit have been created to help readers find a natural path through the task of advocating for ORCID. As a Wikibook is open to input at all times, these sections are being reviewed critically on an ongoing basis. After the latest review by the ORCID Advocacy Toolkit Editorial Board, currently they stand as:

About this book -	Introduction to the toolkit's purpose and usage
Understanding ORCID	Core information about ORCID and its benefits
What is Advocacy?	Strategies and approaches for effective advocacy
Audiences	Who needs to hear about ORCID and how to reach them
Platforms that integrate with ORCID	Technical implementation information
Resources	Templates, materials, and examples for immediate use
So you would like to...	Task-oriented section functioning as an index
Contributors	Recognition of community members who built the toolkit

With the hope that the section titles are self-explanatory, the only one that might not be directly obvious is 'So you would like to...', which is acting as an index and referring to information provided elsewhere in the toolkit.

The Resources section aims to offer promotional templates and materials, but also example emails to various stakeholders, from researchers to senior leadership, and other useful prompts.

Strengthening the Advocacy Toolkit

Building on the momentum of shared sprints and open calls for contribution, the Consortium recognised the need for a more formal yet still inclusive mechanism to keep content fresh. This is where the idea of an Editorial Board arose. Informed by the collaborative process, the Board is designed to coordinate ongoing contributions and ensure the Toolkit remains current, relevant, and aligned with community needs.

The formation of the ORCID Advocacy Toolkit Editorial Board by the Jisc UK Consortium (OAT-ED) took place over autumn/winter 2024. The Editorial Board consists of up to seven members drawn from research institutions, Jisc and ORCID; representing different types of organisations and varying levels of ORCID implementation experience.

The Editorial Board's goals include:

- Enhancing and updating the current Wikibook by addressing gaps, writing or commissioning new content and rethinking the structure
- Promoting the toolkit to new colleagues in the field, be it at conferences or via mailing lists and word of mouth
- Creating practical tools and guidance for different adoption stages

- Basing the creation on the community which already has the knowledge and experience, and offering a platform for structured sharing.

Early drafts of the Toolkit showed that many participants invested a lot of time fine-tuning the layout. While this laid a strong foundation, it also highlighted a key lesson: it helps to have a dedicated group keeping an eye on structure, gathering feedback, and making updates as new materials roll in. By combining the strengths of grassroots engagement with a small group of facilitators, the Board can handle tasks like refining guidelines for contributors, posting calls for new materials, and ensuring the overall user experience remains accessible to busy librarians, research managers, and academic staff.

Above all, the initial idea for the Board was to preserve the “co-creation ethos” that defined the Toolkit’s earliest stages. Rather than forming a gatekeeping body, the Board steers conversation, offers support, and reflects back to contributors what the community has identified as priorities—ranging from short, actionable guides to advanced policy templates. Through continuous consultation with both new and established advocates, the Board aims to nurture a sense of collective ownership over the Toolkit.

How to get involved

Once the latest review of the structure of the Toolkit is completed, content will be needed. Through its iterations, the main areas of interest have been identified, so next the gaps need filling. We would like to enhance the use and exploration of the Wikibook pages, with feedback and ideas invited at the regular ORCID Clinics that Jisc hosts.

We are open to case studies, template emails, tips and tricks when approaching stakeholders or creating reports, and anything else that helped or would have helped your own ORCID advocacy. It will be a dynamic resource, as a toolkit like this can never be truly finished, so we encourage continuous engagement and feedback.

Contributions can be submitted by form at <https://forms.office.com/e/tdgnrEdb6a>.

Conclusion

'From the community, for the community' is the main driver behind the Toolkit, and while the Editorial Board now exists, this aspect remains true. The Editorial Board itself is composed of members from the community, and it will help steer the progress towards making the resource as valuable as it can be, with input from everyone who would like to share their experience, or ask the questions they need answered for a successful adoption.

The Toolkit will ideally be the first point of information for anyone starting out with an ORCID advocacy project, but also for those who have done initial work and need inspiration to keep the momentum going. It aims to facilitate base information and case studies that can then be discussed and developed with peers and ultimately lead to new ideas, creating a cycle of advice and knowledge exchange.

Looking ahead, the Editorial Board has identified several priority areas for toolkit development:

- Expanding discipline-specific advocacy materials to address different research cultures
- Developing resources for measuring and demonstrating ORCID implementation impact
- Creating integration guides for common institutional systems.

Our ultimate goal is to create a self-sustaining resource that evolves with community needs and technological developments. We envision the Toolkit becoming the definitive resource for ORCID advocacy that helps UK institutions (eventually worldwide!) achieve successful implementation.

The Editorial Board is committed to supporting the mission of playing a part in the FAIRness and sustainability of research, and looks forward to collaborating with the open research community to build a stronger, more connected research landscape.

Data availability statement

No data were created or analysed in this paper.

Contribution statement

All authors: conceptualization, writing – original draft, writing – review & editing.

Funding Statement

This research did not receive any external funding.

Competing Interests

All authors are members of the ORCID Advocacy Toolkit Editorial Board.

References

- Meadows, A., Haak, L.L. and Brown, J.** (2019) Persistent identifiers: the building blocks of the research information infrastructure. *Insights* **32**, 9. <https://doi.org/10.1629/uksg.457>.
- ORCID Advocacy Toolkit** (2022). Available at https://en.wikibooks.org/wiki/ORCID_Advocacy_Toolkit (accessed 28 February 2025).
- UK ORCID Consortium.** (2025) <https://www.jisc.ac.uk/orcid>.
- What is ORCID** (2024). Available at <https://info.orcid.org/what-is-orcid/>.
- Why ORCID** (2024). Available at <https://info.orcid.org/researchers/#why>.