



# EXPERT FINDER SYSTEMS

INTERNATIONAL FORUM 2021

## EVENT REPORT

*An Emerging Community of Practice*

## Introduction

The International Forum on Expert Finder Systems—Virtual Series brought together 245 attendees from around the world to enjoy dynamic sessions consisting of keynote addresses, sponsor lightning rounds, best practice presentations, coffee talks, and other opportunities for networking using the REMO platform. The series included the following:

- 3 keynote presentations
- 4 sponsor presentations
- 20 best practices presentations
- 46 speakers
- 1 Q&A with vendors
- 4 coffee talks
- 4 vendor exhibit tables

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## Registrants/Attendees

### **Who Registered**

445 individuals  
39 countries  
26 states (USA) and the District of Columbia

### **Who Attended**

245 attendees  
22 countries  
Australia, Austria, Brazil, Canada, Colombia, Denmark, Finland, Germany, Iraq, Jerusalem, Mexico, Morocco, Namibia, Netherlands, Holland, Peru, Philippines, Spain, Sweden, Ukraine, United Kingdom, United States  
23 states (USA) and the District of Columbia  
Arizona, California, Colorado, Florida, Illinois, Massachusetts, Michigan, Minnesota, Mississippi, Nebraska, Nevada, New Jersey, New York, North Carolina, Ohio, Oklahoma, Oregon, Pennsylvania, South Carolina, Tennessee, Texas, Utah, Washington, Washington D.C.

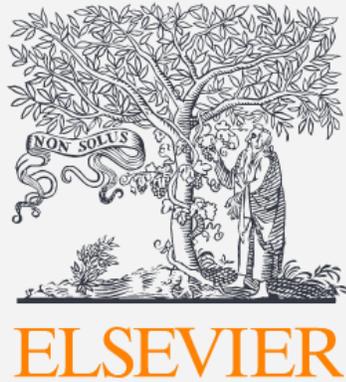
### **Breakdown of Attendees by Session**

Session 1 – 117  
Session 2 – 93  
Session 3 – 83  
Session 4 – 84  
Session 5 – 76  
Session 6 – 57

## Sponsors

The Forum Planning Committee was thankful that these companies provided sponsorship of this event, especially during a pandemic causing worldwide economic struggles.

### Gold Sponsors



### Silver Sponsors



# Program at a Glance

Session 1 Thursday, February 11 11 am–1 pm	Session 2 Thursday, February 18 11 am–1 pm	Session 3 Thursday, February 25 11 am–1 pm	Session 4 Thursday, March 4 11 am–1 pm	Session 5 Thursday, 11 March 11 am–1 pm	Session 6 Thursday, March 18 11 am–1 pm
<p><b>Theme: Challenges and Successes in Implementing a RIM System</b></p>	<p><b>Theme: Supporting Expertise Discovery in the COVID Era</b></p>	<p><b>Theme: Making the Most of Your System</b></p>	<p><b>Theme: Leveraging Relationships in RIM</b></p>	<p><b>Theme: Supporting Institutional Goals through Research Analytics</b></p>	<p><b>Theme: Collaborating with External Partners + Vendor Meetup</b></p>
<p><b>Keynote:</b> Rebecca Bryant, OCLC Research  <span>Role of libraries</span>  <span>Case study</span></p>	<p>Profiles Research Networking Software: Updates and Applications for COVID-19  <span>COVID-19</span>  <span>Harvard Profiles</span></p>	<p><b>Keynote:</b> Bruce A. Weinberg, Ohio State University  <span>Economic development</span></p>	<p>Elements of Success: A Case Study in Library-led Implementation of RIMS  <span>Role of libraries</span> <span>Elements</span>  <span>Case study</span></p>	<p><b>Keynote:</b> Anthony M. Boccanfuso, UIDP  <span>Economic development</span></p>	<p>Building University/Industry Collaboration through Use of Statewide Expert Finder Systems: Revisited  <span>Social interoperability</span>  <span>Economic development</span>  <span>Elements</span> <span>Home grown</span>  <span>Pure</span></p>
<p><b>Meet Our Sponsor</b>—Digital Science</p>	<p>Research Intelligence, Repurposed Data, and Reputation: The Evolution of VIVO, an Open-source Research Information Management System  <span>Clarivate</span> <span>VIVO</span></p>	<p><b>Meet Our Sponsor</b>—Elsevier</p>	<p>Is That All You've Got? Showing Your Institutional Research and Expertise  <span>Role of libraries</span>  <span>Social interoperability</span>  <span>Exploro</span> <span>Research impact</span></p>	<p><b>Coffee Talk</b></p>	<p>Maximizing Faculty Data with a Faculty Information System  <span>Interfolio</span> <span>Policy</span>  <span>Research impact</span></p>
<p><b>Coffee Talk:</b> Small-group Sharing about Your Own Challenges &amp; Successes in RIM</p>	<p>Don't Give-up on the Free Puppy: Lessons Learned on Integration  <span>Tools &amp; technical interoperability</span>  <span>Pure</span> <span>Use case</span></p>	<p><b>Expert Finder Systems for Competitive Analysis:</b> Connecting Scholars@FIU to Strategic Initiatives  <span>Social interoperability</span>  <span>Elements</span> <span>VIVO</span>  <span>Case study</span>  <span>Research impact</span></p>	<p>Building and Leveraging Partnerships: How to Advance EFS from the Middle  <span>Outreach &amp; education</span>  <span>Role of libraries</span>  <span>Social interoperability</span>  <span>Economic development</span>  <span>Elements</span> <span>Case study</span></p>	<p><b>Coffee Talk:</b> What Are You Doing to Maximize Your System?</p>	<p>SDGs in Your Portal: How Is Your Institution Working toward Sustainable Development Goals?  <span>Economic development</span>  <span>Pure</span> <span>Case study</span>  <span>Use study</span> <span>Policy</span>  <span>Research impact</span></p>
<p><b>Faculty Profiles &amp; Tufts</b>  <span>Social interoperability</span>  <span>Elements</span> <span>Case study</span></p>	<p><b>Meet Our Sponsor</b>—Ex Libris</p>	<p><b>Coffee Talk:</b> What Are You Doing to Maximize Your System?</p>	<p>Research Information Management Problems in Research University Ecosystems  <span>Role of libraries</span>  <span>RIM Problems</span>  <span>RIM ecosystem</span></p>	<p>Supporting Interdisciplinary Research at Texas A&amp;M through Discovery of Research Expertise, Reuse of Authoritative Data on Research, and Analysis of Research and Its scholarly and Societal Impact  <span>Role of libraries</span> <span>Elements</span>  <span>VIVO</span> <span>Case study</span>  <span>Research impact</span></p>	<p><b>Coffee Talk</b></p>
<p><b>Bring Your Research Asset Data to Life!</b> Driving Interaction through Dynamic Data Visualizations and Engaging Content  <span>Tools &amp; technical interoperability</span>  <span>Pure</span> <span>Case study</span>  <span>Use case</span>  <span>Research impact</span></p>	<p>Gathering around Projects  <span>Social interoperability</span>  <span>Home grown</span> <span>Case study</span>  <span>Use study</span></p>	<p><b>ReCiter:</b> An Open Source Author Disambiguation System for Academic Medical Institutions  <span>PIDs, metadata</span>  <span>Home grown</span></p>	<p><b>Meet Our Sponsor</b>—Clarivate</p>	<p>Q &amp; A with Vendors</p>	<p>Q &amp; A with Vendors</p>
	<p>Florida ExpertNet's COVID-19 Portal  <span>COVID-19</span> <span>Home grown</span></p>	<p><b>Penn State's Researcher Metadata Database</b>  <span>PIDs, metadata</span>  <span>Tools &amp; technical interoperability</span>  <span>Activity Insight/Digital Measures</span>  <span>Pure</span> <span>Case study</span></p>	<p><b>Meet Our Sponsor</b>—Clarivate</p>		
			<p>Merging Library and EFS Instruction: Creating Collaborative Teams for Strategic Action  <span>Outreach &amp; education</span>  <span>Role of libraries</span>  <span>Social interoperability</span>  <span>Case study</span>  <span>Research impact</span></p>		

## Attendee Feedback

**Twenty-four** people (including sponsor representatives) completed the post-forum survey. Their feedback is summarized below.

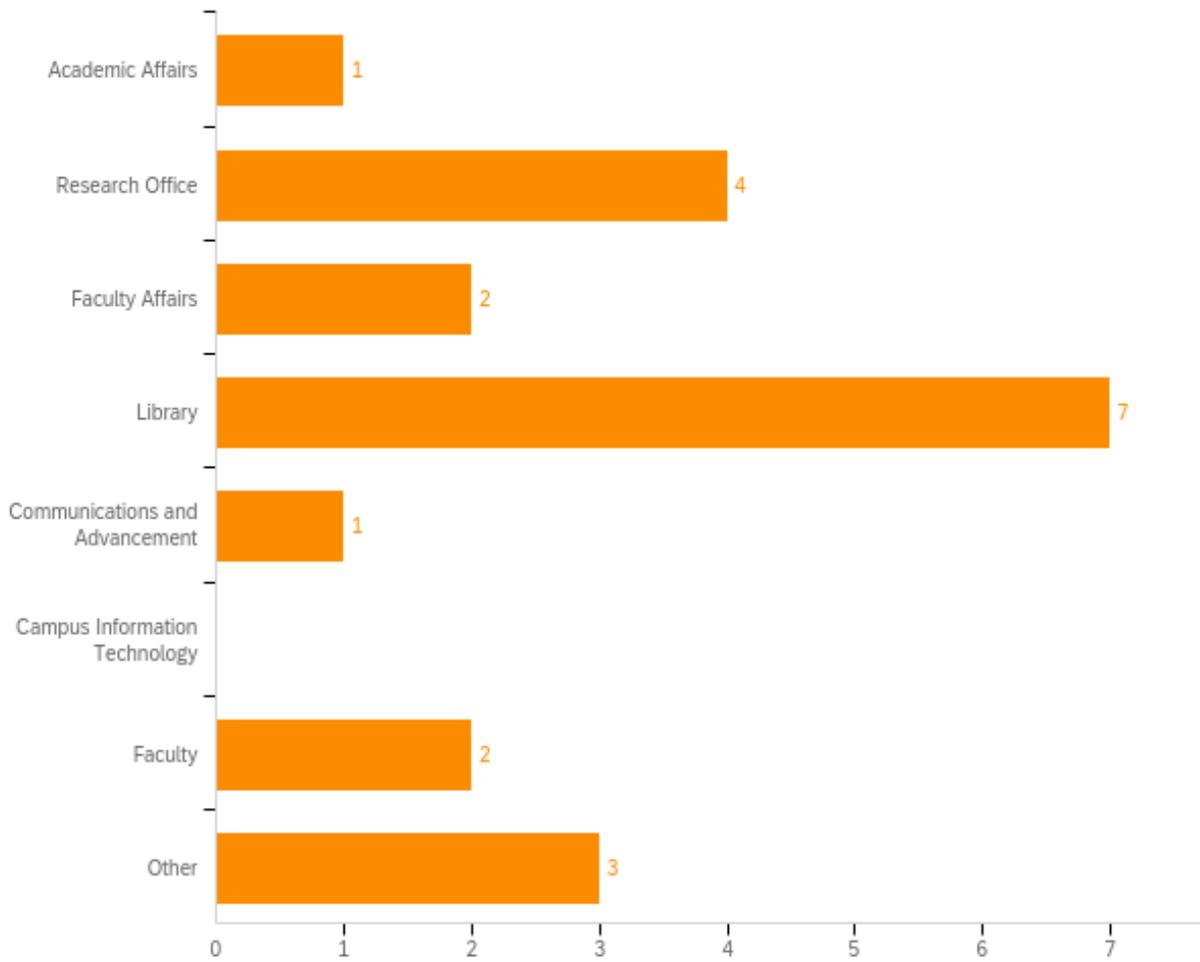
### 1. What is your role in expert finder systems?

Answer	%	Count
Vendor or service provider	20.83%	5
University administrator	12.50%	3
System manager	29.17%	7
Other	29.17%	7
End user	8.33%	2
Total	100%	24

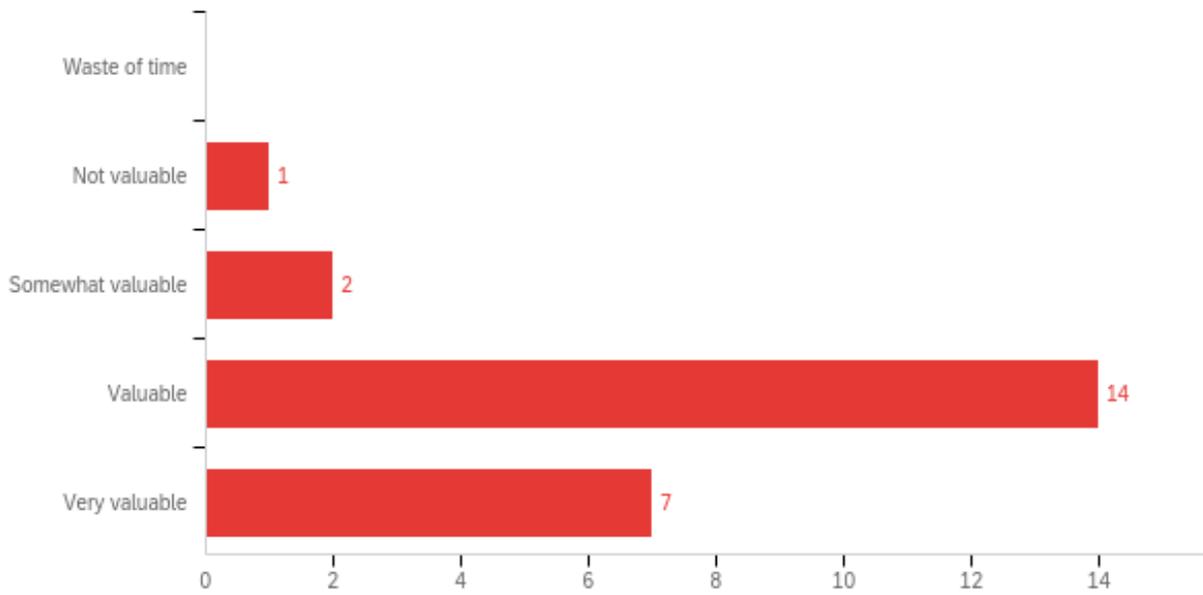
### 2. What type of organization do you represent?

Answer	%	Count
University	70.83%	17
Research institute	0.00%	0
Vendor or service provider	16.67%	4
Government	4.17%	1
Private sector	8.33%	2
Other	0.00%	0
Total	100%	24

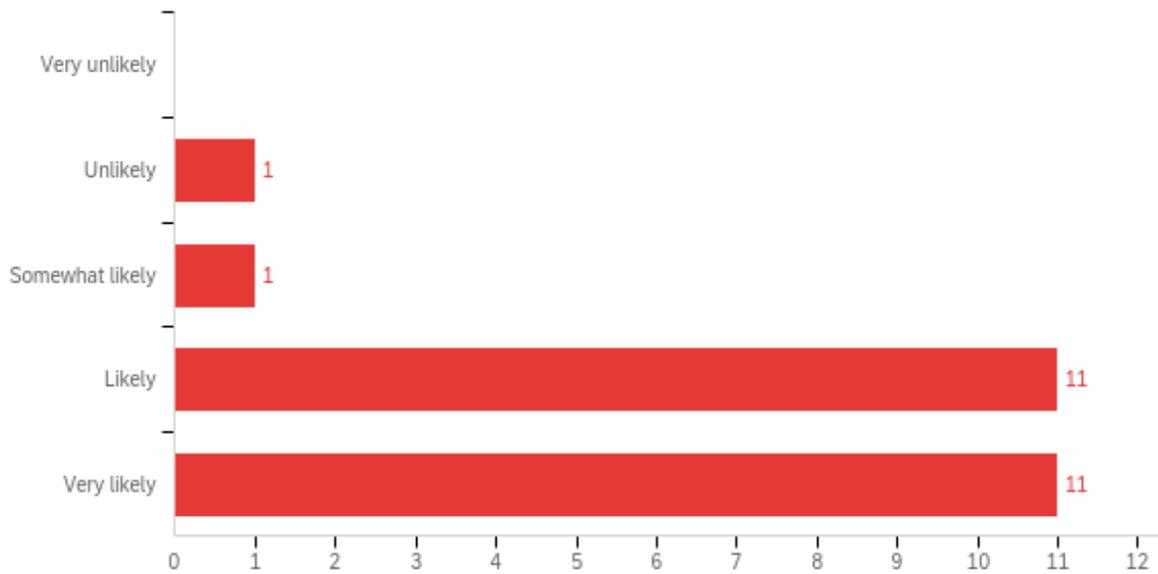
### 3. If you represent a university, what area are you affiliated with?



#### 4. How valuable was the forum to you?



#### 5. How likely are you to recommend the forum to a colleague?



## 6. Which individual sessions were most valuable to you?

This is a hard one to answer because all of the presentations were extremely valuable to me. Because EFS is a new field any information we can get is helpful. But here a few: How We Made the Most of UMETRICS: A Case Study Expert Finder Systems for Competitive Analysis: Connecting Scholars@FIU to Strategic Initiatives Vendor presentations Building University/Industry Collaboration through the Use of Statewide Expert Finder Systems: Revisited Is That All You've Got? Showing your Institutional Research and Expertise

I particularly enjoyed expert portal demonstrations and visualisations as I am currently working with that too. February 11th the Tufts and Aalborg, 18th Harvard Medical school and Florida Expertnet, February 25th Scholars@FIU and PennState were interesting. On March 25th the Minnesota case.

I did enjoy the testimonials and experiences on how organizations have implemented their RIMS.

Umetrics Initiative

\*) Research Intelligence, Repurposed Data, and Reputation: The Evolution of VIVO, an Open-source Research Information Management System - Ann Beynon & Bruce Herbert \*) ReCiter: An Open Source Author Disambiguation System for Academic Medical Institutions - Paul Albert, Sarbajit Dutta & Terrie Wheeler \*) SDGs in Your Portal: How Is Your Institution Working toward Sustainable Development Goals? - Davina Erasmus & Jan Fransen \*) Supporting Interdisciplinary Research at Texas A&M through the Discovery of Research Expertise, Reuse of Authoritative Data on Research, and Analysis of Research and Its Scholarly and Societal Impact - Martha Golubock & Bruce Herbert

Keynote Address: The Rapidly Changing Research Information Management Landscape Faculty Profiles@Tufts: The Journey towards a Comprehensive University EFS Research Intelligence, Repurposed Data, and Reputation: The Evolution of VIVO, an Open-source Research Information Management System Expert Finder Systems for Competitive Analysis: Connecting Scholars@FIU to Strategic Initiatives Elements of Success: A Case Study in Library-Led Implementation of RIMS

Keynote addresses, Rebecca Bryant, Bruce Weinberg and Anthony M. Boccanfuso Panels: Is That All You've Got? Showing your Institutional Research and Expertise Building University/Industry Collaboration through the Use of Statewide Expert Finder Systems: Revisited

I liked the introductions, overviews, and vendor presentations -- I'm in marketing -- so liked the takeaway messaging

- Supporting Interdisciplinary Research at Texas A&M through Discovery of Research Expertise, Reuse of Authoritative Data on Research, and Analysis of Research and Its scholarly and Societal Impact - Building University/Industry Collaboration through Use of Statewide Expert Finder Systems: Revisited - Coffee Talks

VIVO systems

I'm a librarian and the Keynote Address: "How We Made the Most of UMETRICS: A Case Study" and Penn State's Researcher Metadata Database were the most interesting to me, although I thought it was a very good program overall.

Those that addressed stakeholder relationships, and those that were related to the vendor of the university's system.

"RIMS vendors meetup" and "Supporting Expertise Discovery in the COVID era " especially talking about some Strategies for success.

Since I could not attend all presentations live, I look forward to going back and watching videos, where possible. Sessions that included latest work from Texas A&M was very useful -- given out interest in open source. What little networking I did was nice -- but my lack of significant networking is not fault of system or conference, but busy schedule forcing limited attendance throughout an entire day.

Research Information Management Problems in Research University Ecosystems Elements of Success: A Case Study in Library-Led Implementation of RIMS (Oklahoma State University)

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Florida ExpertNet's COVID-19 Portal Expert Finder Systems for Competitive Analysis: Connecting Scholars@FIU to Strategic Initiatives Penn State's Researcher Metadata Database

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By far, the most informative session was: Q & A with RIM System Vendors This should be a standard fixture at future events! Additional presentations I particularly valued were: Keynote Address: How We Made the Most of UMETRICS: A Case Study Elements of Success: A Case Study in Library-Led Implementation of RIMS SDGs in Your Portal: How Is Your Institution Working toward Sustainable Development Goals?

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Opening keynote and some of the examples of implementing pieces of RIM systems to measure faculty outputs.

## 7. What could we add to improve the forum in the future?

I think this was perfect, thank you! But I might have interacted more with fellow participants if the sessions were organised together over e.g. three day period. This year it was perfect to have something interesting to tune to every week.

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Nothing

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The set-up of the forum is fine as it is.

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N/A

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I attended in the hopes of seeing more open source systems designed to do this work. The vendors each have limitations on their products; we have reviewed them all. I am disappointed that there is not more open source work done in this space, that allows universities like ours to own our own data. I was extremely interested in the VIVO presentations, however. If this concept of "VIVO in a box" that was mentioned can be further developed, this would have made this conference entirely worth my time, and I would share this open source software with my peers in Information Technology.

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No additions to recommend

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Some solutions roadmaps.

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Maybe ability to have more structured networking opportunities in the virtual conference environment -- pre-broadcast to attendees opportunities to talk with specific people, who would volunteer to be at a virtual table to chat about their work or services -- for a specific period of time during a day.

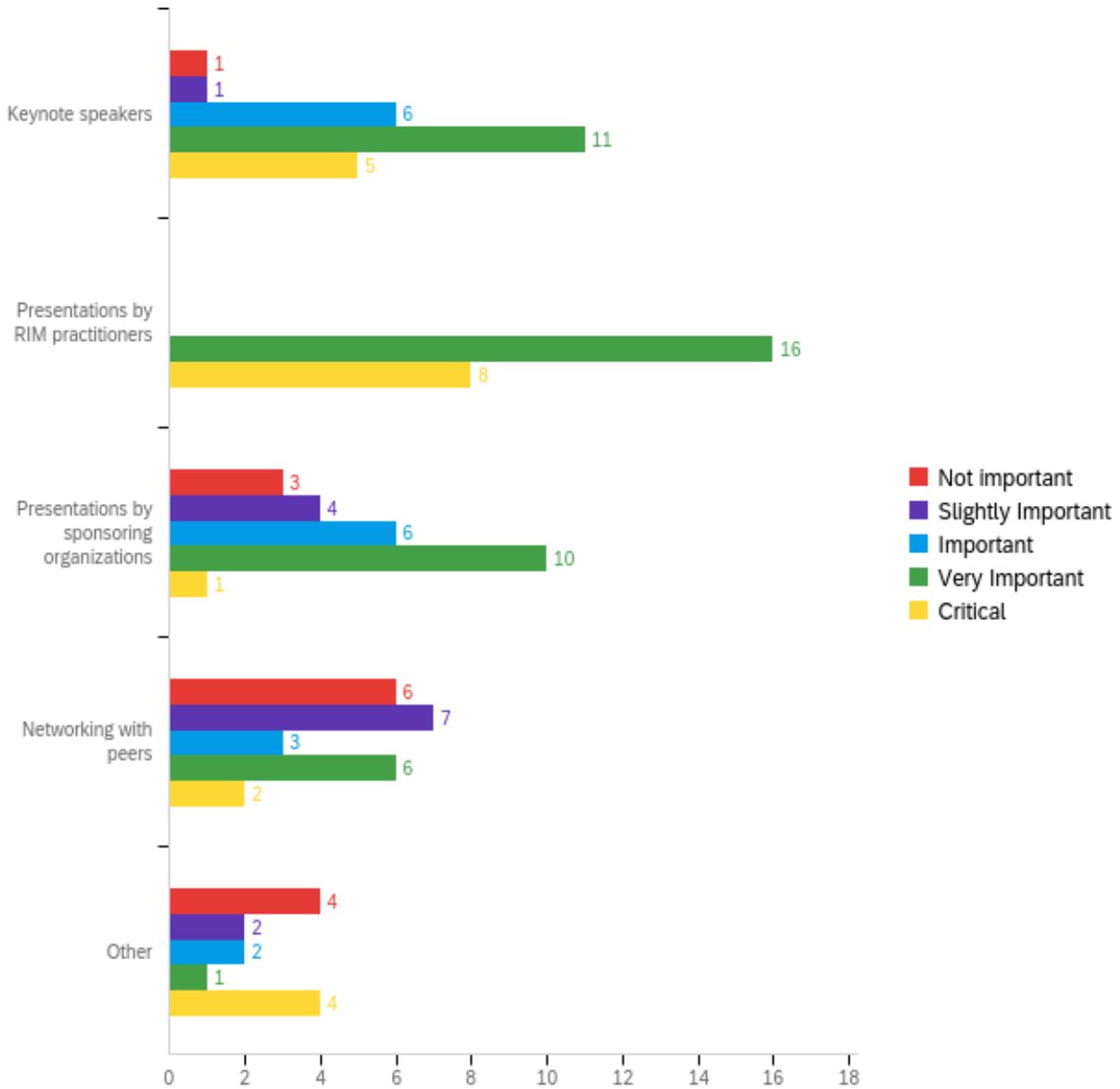
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While the Remo platform was great, the screens kept moving and switching viewing modes, which made it really difficult to concentrate on the speakers. Ensuring a more consistent view mode would be a significant improvement

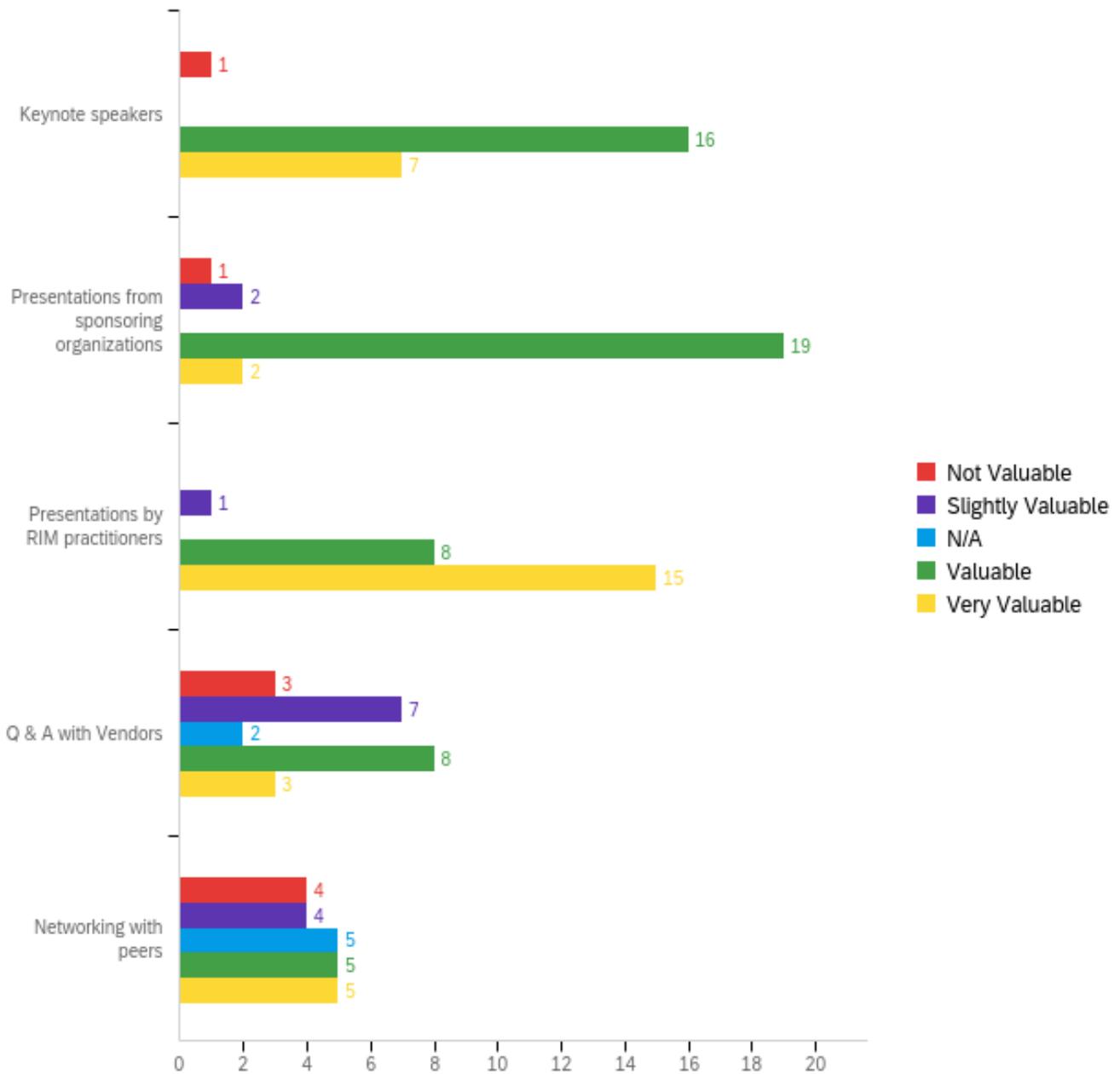
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This was my first forum and I think I would be more interested in the networking option if I were in person, but it was harder to do virtually when I'm new to this space.

**8. What were your reasons for attending the forum? Rate the importance of the following:**



## 9. Rate how valuable the following were to you:



## 10. What topics would you like to see addressed at a future forum?

A Q&A with vendors and system managers.

International collaboration stories, successes and good practices in RIMS

Data science in libraries Metrics

Research analytics, research intelligence.

New and different integrations, more end users of Expert Finder Systems

N/A

Having a panel discussion for usage of different systems and perspectives from users/administrators/vendors

Open source solutions.

Further exploration of the stakeholder landscape involved in implementing RIMS

The possibility of collaborative projects between/across universities -- challenges and what would amount to possible best practices. With some thought, maybe the binary question below (F2F or Virtual) is a challenge. I think that successful conferences in the future might have elements of both -- through hybrid possibilities. But the chance to more fully network likely gives the advantage to the physical conference.

Making a compelling case for a RIMS or how to think about switching from one system to another. How to talk with your campus when you have a RIMS but it's not fully implemented.

## 11. Any additional comments?

Other boxes needed a text box so we could list our answer. The Forum is picking up speed with many more adopters of EFS. The planning committee did an excellent job in making the virtual event worth our time. The program was excellent!

Although connectivity when presenting was a challenge for some presenters, the event was well organized and structured. My recommendation for presenters would be to turn off their camera once their presentation begins as it would free up bandwidth for the system broadcasting the event. One can not prevent technical glitches but at least one can plan ahead in case of. Thanks much!

No for this moment

None.

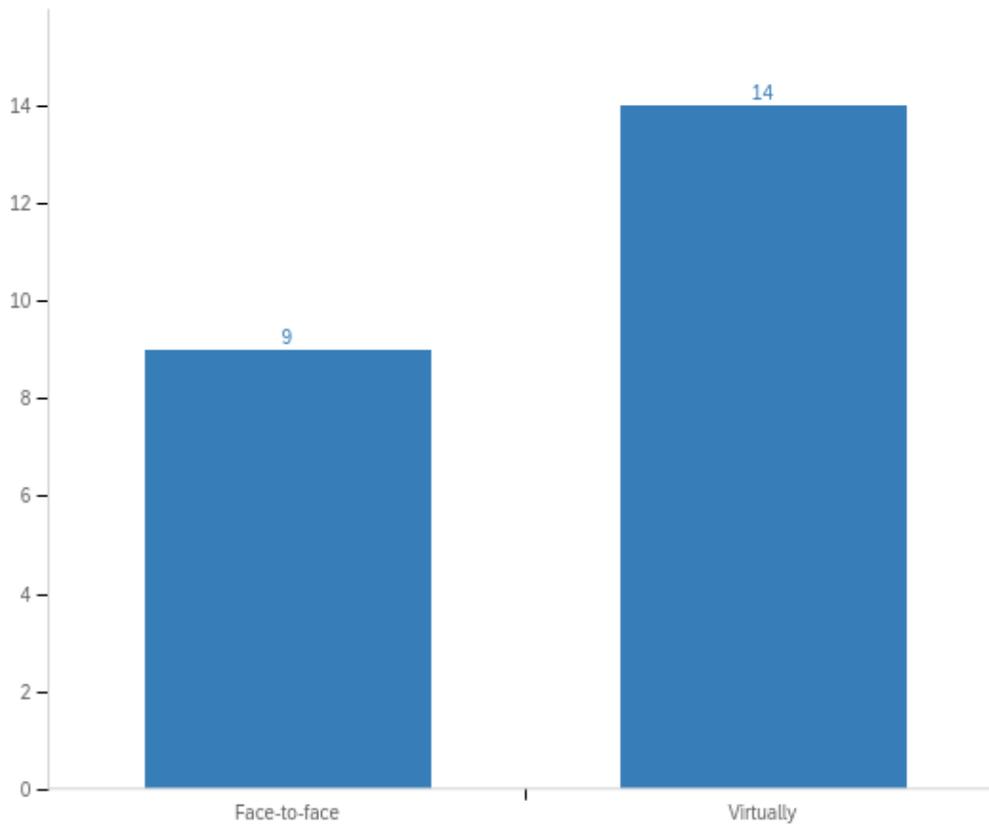
It was great! Kudos!

I thought the virtual platform was excellent -- I really liked the breakout sessions where you could network or be by yourself -- I did go to a vendor booth, but the no one was there -- so that was disappointing

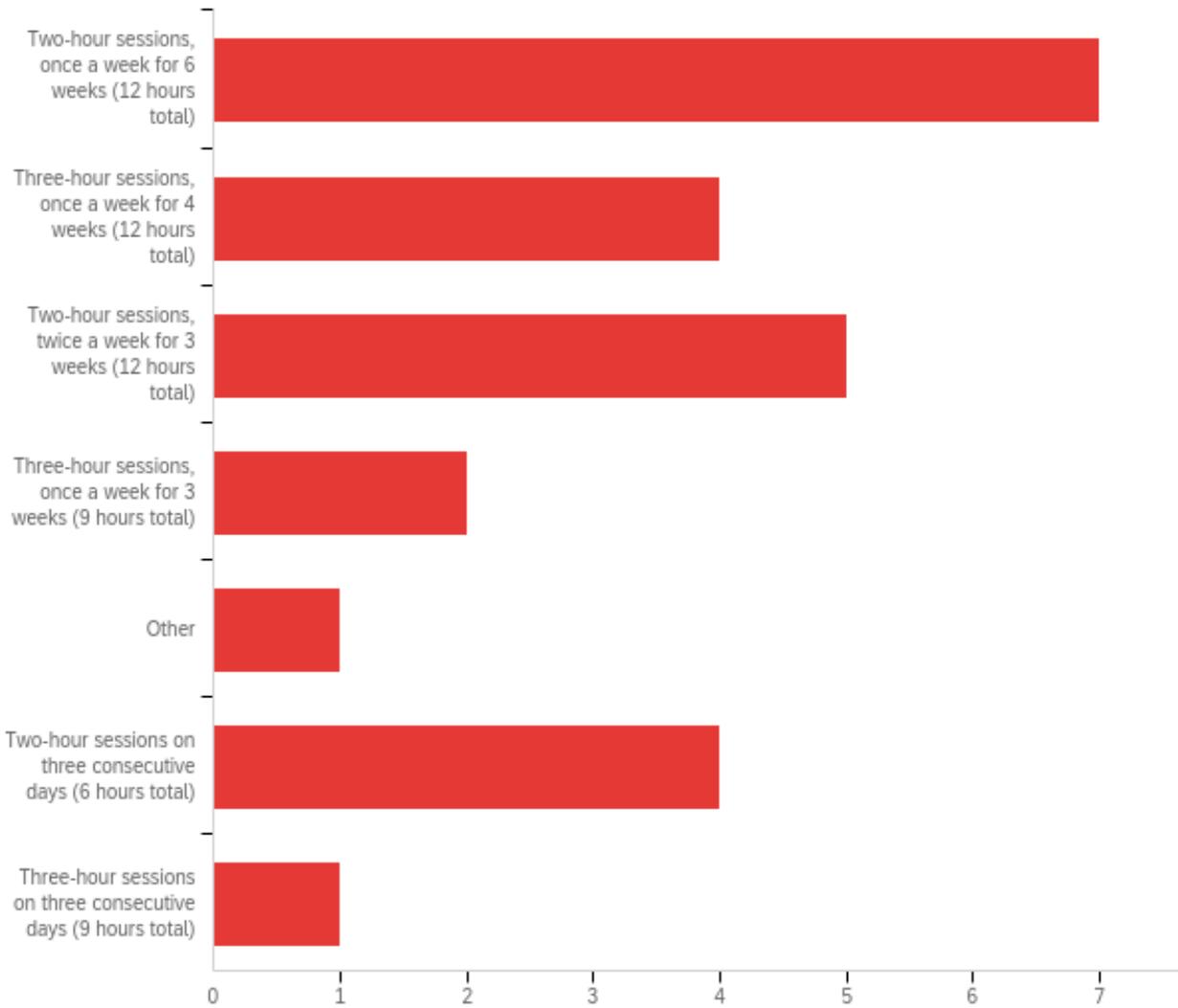
As a virtual I think it was made the best way it should, but even then, I couldn't attend for all sections, cause my UTC-3 sent me back to work almost every day.

It would be good to highlight the "international" involvement -- what makes it truly international, in the future. Study and share just how international it was -- and opportunities to make it more so.

## 12. Would you prefer the next forum to be held face-to-face or virtually?



### 13. If the next forum is held virtually, which format would you prefer?



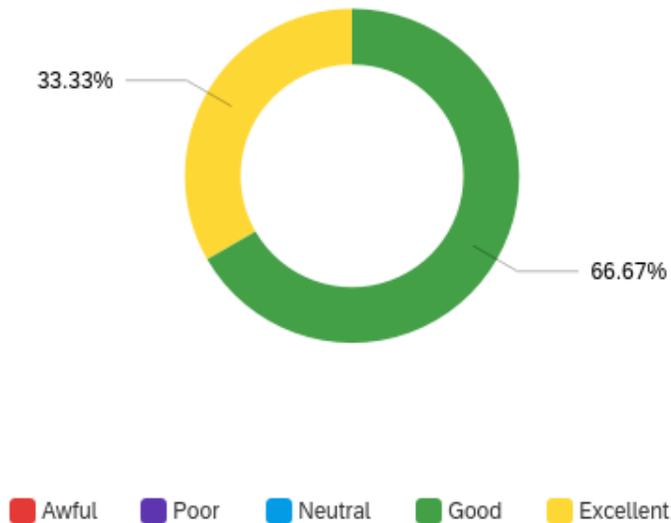
### 14. What format do you suggest?

Perhaps Hybrid -- if pricing structure can reflect it -- such could increase overall "attendance" and reach.

## Sponsor Feedback

Four representatives of sponsoring companies completed the survey. Their feedback specifically about sponsorship is summarized below.

### 1. How would you rate your experience as a sponsor of the forum?



### 2. What did you like about your experience as a sponsor?

Different points of views and opportunities to interact with participants.

I wasn't the direct contact, but I liked that the vendors (and their customers) didn't sell anything -- they were effective information providers

I really liked the ability to "sit" at smaller tables to have discussions; I was the moderator for the library focused sessions and I really valued the ability to talk with the presenters.

### 3. What would you like to see changed for future forums?

May be splitting the networking time in three to allow for more interaction with the participants in between presentations.

N/A

I'd like to go back to face to face.

### 4. Are you likely to participate as a sponsor again?

All four sponsors indicated they would be likely to participate as a sponsor again.

## Full Program

Thursday, February 11

### Theme: Challenges and Successes in Implementing a Research Information Management System

**11:00 am–11:10 am**      **Welcome**

**11:10 am–11:50 am**      **Keynote Address**

[Rebecca Bryant](#), *Senior Program Officer, OCLC Research*

Rebecca Bryant conducts research and develops programming for the OCLC Research Library Partnership related to research information management, research data management, and institutional scholarly communications practices. Bryant served in previous roles at the University of Illinois, including as project manager for researcher information services in the University Library, assistant dean in the Graduate College, and project leader on the system-wide UI-Integrate ERP implementation project. She also served as director of community at ORCID, where she led outreach initiatives to encourage the adoption of ORCID identifiers throughout the scholarly communications community.

**11:50 am–Noon**              **Meet Our Sponsor—*Digital Science***

**Noon–1:15 pm**              **Coffee Talk: Small-group Sharing on Your Own Challenges & Successes in RIM**

**1:15 pm–1:35 pm**              **Faculty Profiles @ Tufts: The Journey towards a Comprehensive University EFS**

[Paul Bergen](#), *Educational Technology & Learning Spaces Director, Tufts University*

[Lily Troia](#), *Solutions Account Manager, Digital Science*

Tufts partnered with Digital Science to create a comprehensive source to identify all faculty across nine university schools, develop a sustainable resource documenting the intellectual capital produced by faculty, and allow faculty to be discovered and connect with colleagues at the university and beyond. This session documents lessons learned, including review of the selection process, approach to stakeholder engagement, and planning around roll-out of Faculty Profiles@Tufts—all while sustaining alignment with institutional priorities, managing needs of varied groups, and focusing on sustainability. Collaboration resonates in this story, in terms of both Tufts' internal processes and the relationship with Digital Science.

**1:35 pm–1:55 pm**              **Bring Your Research Asset Data to Life! Driving Interaction through Dynamic Data Visualizations and Engaging Content**

[Anne Lykke](#), *VBN Team, Aalborg University*

[Kristian Toland](#), *Product Manager, Pure Portals, Elsevier*

[Søren Vidmar](#), *Consultant/Product Manager, Aalborg University (Denmark)*

The presenters discuss how they use their portal to showcase the university's research assets. Next, they show some new ways they have tried to visualize their research data in different contexts to make the data more visually appealing and interesting to explore and to make the data interactive. They also show

examples of how they have tried to bring their data to life through services such as Flourish, Google Data Studio, and Sway. Finally, the presenters cover the challenges they still face in making their data appealing—working both independently and in collaboration with the Elsevier Pure team.

**1:55 pm–2:00 pm**      **Wrap Up**

*Thursday, February 18*

## **Theme: Supporting Expertise Discover in the COVID Era**

**11:00 am–11:20 am**      **Profiles Research Networking Software: Updates and Applications for COVID-19**

[Griffin Weber](#), *Associate Professor of Medicine and Biomedical Informatics, Harvard Medical School*

Profiles Research Networking Software is an open-source semantic web application that generates searchable online profiles of an organization's investigators. It begins with names, positions, and contact information from the organization's internal administrative systems and then searches external data sources to link content, such as publications, to investigators' profiles. Data mining algorithms discover connections between investigators. Data visualizations display the connections as interactive graphs. Profiles RNS was created at HMS and is used in dozens of institutions. The presenter discusses updates to Profiles RNS and a new site, CovidAuthors.org, which uses Profiles RNS to visualize the global community of researchers publishing on COVID-19.

**11:20 am–11:40 am**      **Gathering around Projects**

[Karin Scarpinato](#), *Senior Associate Vice President, Research, Florida Atlantic University*

Existing expertise databases have intrinsic problems that may discourage their use by faculty. One is that they provide a general sense of the faculty's training, but do not convey their latest research idea or project. Also, when collaborations happen organically among faculty, in almost all cases they happen because the faculty talk about an idea or project. So FAU created a project-centered tool that allows researchers to "meet" around their ideas, rather than their expertise. A second module, a project-management tool specific for grant writing, allows research administrators to take these teams toward funding.

**11:40 am–Noon**      **Don't Give-up on the Free Puppy: Lessons Learned on Integration**

[Melodi Moore](#), *Research Development Specialist, University of Texas Medical Branch*

In 2015, the University of Texas System gifted its 13 institutions the Elsevier Pure Experts Profile system for three years. It was at this time that Moore first heard the phrase, "Never accept a free puppy"—meaning the puppy is never *really* free because of the time and cost of training and caring for it. The presenter shares the experiences of the team at UTMB as they started integrating Pure with local systems, along with their successes and challenges. She also discusses the team's plans for integrating Pure with other systems.

**Noon–12:10 pm**      **Meet Our Sponsor—*Ex Libris***

**12:10 pm–12:35 pm**      **Research Intelligence, Repurposed Data, and Reputation: The Evolution of VIVO, an Open-source Research Information Management System**

[Ann Beynon](#), *Global Manager, Sales and Customer Success Training, Science Group Clarivate*

[Bruce Herbert](#), *Director, Scholarly Communications, Texas A&M University*

VIVO is member-supported, open-source software and ontology for the representation of scholarship. VIVO supports research discovery, expert finding, network analysis, and assessment of research impact. The presenters describe new initiatives and product development by the VIVO community, including an emerging strategy to couple VIVO implementation with the Web of Science to provide cost-effective solutions to specific institutional needs. They explore VIVO implementations at U.S. and European institutions that have led to strong faculty engagement. Specifically, they compare the evolution of implementations that support interdisciplinary collaboration, research intelligence, and scholarly reputation.

#### **12:35 pm–12:55 pm Florida ExpertNet's COVID-19 Portal**

Blair Monroe, *Assistant Director, Center for Information Management and Educational Services, Florida State University*

Florida ExpertNet brings together information about externally funded researchers from a dozen of Florida's public and private universities. Its purpose is to facilitate research collaboration across universities and to support the state's economic development aims. In 2020, ExpertNet developed a new sub-site highlighting the work of researchers in specialties relevant to COVID19—from the life sciences, engineering, social sciences, and beyond. The presenters discuss the development and implementation of that portal.

#### **12:55 pm–1:00 pm Wrap Up**

*Thursday, February 25*

### **Theme: Making the Most of Your System**

#### **11 am–11:40 am Keynote Address**

—*Bruce A. Weinberg, Professor of Economics and Public Affairs, The Ohio State University*

Bruce Weinberg's research spans the economics of creativity and innovation; the determinants of youth outcomes and behavior; and technological change, industrial shifts, and the wage structure. Weinberg has held visiting positions at the Hoover Institution at Stanford University, the National Bureau of Economic Research, and Princeton University. He is a research fellow at the IZA - Institute of Labor Economics, Bonn, and research associate at the NBER. Weinberg is also an associate editor of the *Industrial and Labor Relations Review* and the *New Palgrave Dictionary of Economics*.

#### **11:40 am–11:50 am Meet Our Sponsor—Elsevier**

#### **11:50 am–12:10 pm Expert Finder Systems for Competitive Analysis: Connecting Scholars@FIU to Strategic Initiatives**

[L. Bryan Cooper](#), *Associate Dean for Engagement and Innovation, Florida International University Libraries*

[David Driesbach](#), *Assistant Vice President for Research, FIU*

[Elana Karshmer](#), *Head of Information & Research Services, Green Library, FIU*

Learn how Scholars@FIU became a critical component of institutional planning and execution for rankings, research, and reputation. This case study starts with an initial partnership between two members of the University Library and the Office of Research and Economic Development that evolved into a university-wide team. Partnerships with vendors such as Digital Science, Clarivate Analytics, and Elsevier were fostered for the creation of an enhanced data infrastructure, enabling both discovery and competitive analysis supporting FIU's schools and colleges in their drive to contribute to institutional performance. The team also engaged campus units responsible for visualizing data output and marketing, helping position the university to advance in national and international rankings.

**12:10 pm–12:25 pm Coffee Talk: What Are You Doing to Maximize Your System?**

**12:25 pm–12:40 pm ReCiter: An Open Source Author Disambiguation System for Academic Medical Institutions**

[Paul Albert](#), *Identity & Access Management Architect / Associate Professor, Weill Cornell Medicine*

[Sarbjit Dutta](#), *Senior Architect, Weill Cornell Medicine*

[Terrie Wheeler](#), *Library Director, Weill Cornell Medicine*

ReCiter is a highly accurate, rule-based system for inferring which publications in PubMed a given person has authored. It does so by leveraging institutionally maintained identity data (e.g., departments, relationships, email addresses, year of degree). With the more complete and efficient searches that result, institutions can save time and be more productive. Running ReCiter daily, one can ensure that targeted users are the first to learn when a new publication has appeared in PubMed. The presenters demonstrate how to run ReCiter, its set of APIs for retrieving data, and integration with a third-party interface to capture feedback to further improve accuracy.

**12:40 pm–12:55 pm Penn State's Researcher Metadata Database**

[Dan Coughlin](#), *Assistant Librarian, Head, Libraries Strategic Technologies, Penn State University, University Libraries*

The Researcher Metadata Database aggregates information from campus systems such as ORCID, Pure, Digital Measures, Clarivate, NSF, Open Access Button, our Electronic Theses and Dissertation System, and Workday. The goals were to reproduce the ability to aggregate this data on demand, to provide access to other units and campuses within Penn State via an API for applications such as faculty and department websites (by supplying a near out-of-the-box solution), to provide common reports on this data for administrative functions, and to power an open-access workflow to help reduce faculty burden in complying with the institution's open access policy.

*Thursday, March 4*

## **Theme: Leveraging Relationships in Research Information Management**

**11:00 am–11:20 am Elements of Success: A Case Study in Library-Led Implementation of RIMS**

[Clarke Iakovakis](#), *Scholarly Services Librarian, Oklahoma State University*

[Megan Macken](#), *Oklahoma State University, Digital Scholarship Librarian*

[Matt Upson](#), *Oklahoma State University, Associate Dean for Research & Learning Services*

The OSU library managed the university-wide implementation of a RIM system—deploying expertise in data modelling (in mapping existing data sources to the RIM system data structure), harvesting (in gathering thousands of author identifiers and fuzzy merging them to existing faculty), and wrangling (in normalizing position titles and adding degrees via the system’s API). While the library leveraged traditional library functions such as collaboration, outreach, training, and scholarly communications, care was taken to avoid traditional pitfalls such as adopting a behind-the-scenes, service-provider role. This session addresses how the library can use RIM system implementation to define its role as a university leader and research partner.

**11:20 am–11:50 am    Is That All You’ve Got? Showing your Institutional Research and Expertise**

[Bob Banerjee](#), *Director for Content Marketing, Ex Libris*

[Jessica Clemons](#), *Research Solutions Expert, Ex Libris*

[Tracy Elliott](#), *Dean, Wilson G. Bradshaw Library, Florida Gulf Coast University*

[Danuta Nitecki](#), *Dean of Libraries/Professor of Information Science, Drexel University*

How can academic libraries promote institutional research expertise and output by doing what they do best—collecting and organizing information and making it easily discoverable? A panel of library administrators provides observations and insights to help academic libraries apply their unique skill set to the task of supporting the institutional goal of increasing research impact and reputation. They discuss using a RIM system to increase visibility, strengthening partnerships between the library and the research office and other critical stakeholders, and focusing on the metrics that are most important for optimizing researcher profiles and discoverability of their data and documented research.

**11:50 am–12:10 pm    Building and Leveraging Partnerships: How to Advance EFS from the Middle**

[Jeffrey Agnoli](#), *Office of Research, Research Development Office, The Ohio State University*

Since 2018, the Ohio Innovation Exchange has served as a driver of economic development and innovation across Ohio. With an eye towards the future, the implementation team successfully secured a grant from the Ohio Department of Higher Education's Third Frontier, a technology-based economic development initiative. Funding from this program facilitates new partnerships with our regional economic development offices, industry engagement/higher education professionals, academic leaders, faculty members, and library colleagues. Learn practical ways to leverage these partnerships towards measurable outcomes.

**12:10 pm–12:30 pm    Research Information Management Problems in Research University Ecosystems**

[Na-eun Han](#), *Doctoral Student, School of Information, Florida State University*

[Dong Joon Lee](#), *RIMS Librarian and Assistant Professor, University Libraries, Texas A&M University*

[Besiki Stvilia](#), *Professor, School of Information, Florida State University*

This presentation reports on a qualitative study that interviewed 15 research information managers and librarians in November and December 2019. They represented 15 Doctoral Universities with Highest Research Activity in the Carnegie Classification of Institutions of Higher Education. The study examined types of research information curated, research information management services provided, and types of problems and tensions of RIM service provision and adoption on university campuses from RI managers’ and librarians’ perspectives. It also identified the skills RI managers and librarians need be successful. In addition,

the presenters discuss how the study's findings and information science theories can inform the design and evaluation of RIM workflows and systems on university campuses.

**12:30–12:50 pm      Merging Library and EFS Instruction: Creating Collaborative Teams for Strategic Action**

[L. Bryan Cooper](#), *Associate Dean for Engagement and Innovation, Florida International University Libraries*

[David Driesbach](#), *Assistant Vice President for Research, FIU*

[Elana Karshmer](#), *Head of Information & Research Services, Green Library, FIU*

This presentation touches on the importance of scholar profiles as they relate to the university ranking process, while discussing techniques FIU used to develop tools that assist faculty in creating their profiles and disambiguating their information. By showing how staff from the library and the research and economic development office worked together to design instructional content, explain the importance of the project, and provide ongoing support, this presentation may assist other institutions in developing similar teams and outcomes.

**12:50 pm–1:00 pm      Wrap Up**

*Thursday, March 11: 11 am–1 pm*

**Theme: Supporting Institutional Goals through Research Analytics**

**11 am–11:40 am      Keynote Address**

[Anthony M. Boccanfuso](#), *President & CEO, UIDP*

Since 2007, Tony Boccanfuso has led UIDP, a membership organization comprised of top innovation firms and research universities from around the world. UIDP's goal is to strengthen partnerships between the academic and corporate sectors while helping its members achieve meaningful impact on an array of university-industry collaboration matters—from contracting to commercialization and workforce development. Boccanfuso has more than 30 years of research and commercialization experience managing administrative, programmatic, and strategy initiatives for academic, government, and private sector firms, including NSF, NIH, and PricewaterhouseCoopers.

**11:40 am–11:50 am      Coffee Talk**

**11:50 pm–12:10 pm      Maximizing Faculty Data with a Faculty Information System**

[Jonathan Grant](#), *Director of the Policy Institute/Professor of Public Policy and Assistant Principal for Strategy, King's College London*

[Christine Lee](#), *Senior Director, Marketing, Interfolio*

Universities have access to a wealth of data about the work of scholars—but how can that data be actionable and beneficial to both the faculty and the institution? How can a faculty information system that focuses on a full picture of faculty contributions and development—research, teaching, grants, committee work, innovation—most productively fuel research collaboration and public research profiles? Grant discusses research impact from a global viewpoint. Presenters also share how leading institutions track and report

scholarship, teaching, and service to support faculty and institutional goals. The discussion explores what a faculty information system-centered approach to RIM entails.

**12:10 am–12:30 pm    SDGs in Your Portal: How Is Your Institution Working toward Sustainable Development Goals?**

[Davina Erasmus](#), *Director Product Management, Elsevier*

[Jan Fransen](#), *Service Lead for RIM Systems, University of Minnesota*

The U of M has found the United Nations Sustainable Development Goals to be a useful lens for understanding its impact at all levels, from local to global. As the university prepares to submit data for the Times Higher Education Impact Rankings, it is also looking for ways to illustrate progress toward each goal and connect researchers working toward similar goals. The presenters discuss efforts to leverage their portal and search architecture to show off researchers' work related to each SDG. They share successes and challenges and look to how the Pure portal can help researchers and institutions build their own SDG narratives.

**12:30 pm–12:50 pm    Supporting Interdisciplinary Research at Texas A&M through the Discovery of Research Expertise, Reuse of Authoritative Data on Research, and the Analysis of Research and Its Scholarly and Societal Impact**

[Martha Golubock](#), *Senior Solution Manager, Digital Science*

[Bruce Herbert](#), *Director, Office of Scholarly Communications, Sterling C. Evans Library, Texas A&M University*

Texas A&M University Libraries developed Scholars@TAMU based on VIVO, member-supported, open-source software and an ontology for representing scholarship. The team coupled two Digital Science databases (Dimensions and Altmetrics) to Scholars@TAMU to enhance the RIM system's capabilities. The systems are interoperable, allowing relatively easy information sharing between VIVO and the databases. Specifically, the team took advantage of Dimensions' categorization of research publications based on the Australian/New Zealand Fields of Research classification scheme. The resulting system supports interdisciplinary research through the discovery of research expertise, reuse of authoritative data on research, and analysis of research and its scholarly and societal impact.

**12:50–Noon    Wrap Up**

*Thursday, March 18*

**Theme: Collaborating with External Partners and RIMS Vendors Meetup**

**11 a.m.–11:50 am    Building University-Industry Collaboration through the Use of Statewide EF Systems: Revisited**

[Jeff Agnoli](#), *Office of Research, Research Development Office, The Ohio State University*

[Amy Finley](#), *Director, Florida ExpertNet, Florida State University*

[Kathryn Kelley](#), *Executive Director, Ohio Manufacturing Institute*

[Iryna Lendel](#), *Director, Center for Economic Development, Cleveland State University*

[Kim Lloyd](#), *Director of Special Projects, FuzeHub*

This session provides an update on a panel discussion at the 2016 Technology Transfer Conference regarding the progress made the past four years with these systems. In 2016 the panel was comprised of a group of participants in a study conducted by Iryna Lendel for the Ohio Manufacturing Institute titled Best Practices of Creating Innovation Exchange Web Portals across the States. Presenters provide an update on where they are four years later and lessons learned along the way.

**11:50 am–12:50 pm Q & A with RIM System Vendors**

This panel includes vendors representing services and products that support expert profiling and research information management systems. They span proprietary and open-source communities, including platforms and data services supporting turn-key and hybrid systems. The panelists represent information ecosystems that help market institutional reputation, while assisting with metrics analytics and other data assessments for organizations. Topics include defining a RIM system, use cases, varying geographical markets, reality of actual implementations, interoperability between systems, and strengths and challenges of different systems.

**12:50 pm Forum Wrap Up**

