



EXPERT FINDER SYSTEMS

NATIONAL FORUM 2019

EVENT REPORT

An Emerging Community of Practice

Introduction

The inaugural National Forum on Expert Finder Systems brought together 70 attendees from 19 states and Canada to enjoy two dynamic keynote addresses, numerous panel sessions, and an interactive town hall meeting in Orlando, Florida, on February 28 and March 1, 2019.

From the welcome reception to the closing session, participants enjoyed many valuable opportunities to engage with the issues surrounding expert finder systems, network with a diverse group of professionals from all parts of the EFS ecosystem, and consider prospects for building a community of practice for expert finder systems.

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Key-notes

Each morning of the forum brought a thought-provoking keynote address from a leader in the field.

Topic: Present and Future Trends in Expert Finder Systems

Robert H. McDonald, professor and dean of libraries at the University of Colorado Boulder, led attendees through present and future trends in EFS, focusing on the university perspective:

- Open-access institutional repositories and how to make data that are not published in a journal available to others
- Using data about what researchers are working on across the university to enhance effectiveness of research, grant applications, etc., and build more effective intra-institutional, inter-institutional, and cross-sector collaborations
- The impact of user experience on researchers' willingness to keep their data correct and current and ways to incentivize them to do so—or to make it unnecessary for them to do so by populating their profiles in other ways
- The impacts of researcher information systems on researchers, the institution, and the institution's core partners
- Data governance for expert finder systems—including the differing perspectives of researchers and institutions on data governance

Questions from the audience focused on “how to count things, what to count, and how to cite it.” For example: How do we capture data from humanists, creators, and others for whom publications are not the “coin of the realm”? How do we reflect co-production of knowledge—for example, farmers who collaborate on research projects with climate scientists?

Topic: Some Assembly Required—Team Recommender Systems and the Future of Work

Noshir Contractor, professor of behavioral sciences and director of the Science of Networks in Communities Research Center at Northwestern University, demonstrated his agility by giving his keynote address via video call after his flight from India was cancelled.

Contractor discussed “social networks” for researchers and how researchers seek the expertise of other researchers and form teams, including the questions:

- Who is connected with whom and how do those connections affect researchers’ choice of collaborators?
 - It’s not who you know or what you know, it’s what others *think* you know.
 - It’s also what you *don’t* know—we look for someone who knows what we don’t know.
- What factors predict whom someone will seek out for expertise? Those factors include proximity, social exchange, previous collaboration, and more—often in combination.

Contractor also demonstrated the My Dream Team Assembler application, which uses preference matching and network heuristics to provide recommendations for team assembly. The software was developed by the Science of Networks in Communities research group and the Advancing Teams, Leaders, and Systems lab, both at Northwestern University.

Panel-ing

Titles and presenters for each panel are provided on pages 7 and 8.

The forum brought together a mix of builders and users of expert finder systems with decision makers and other stakeholders to lead panel sessions. Panelists included economic development professionals, university librarians, university research development professionals, platform providers, and more.

Some panels focused on university perspectives, while others represented economic development perspectives. So even attendees who, for example, had used expert finder systems to promote research collaborations on their campus for years heard for the first time from those who are using similar systems to promote economic development. And economic development professionals heard from experts in information management, research collaborations, and more.

Panelists included economic development professionals, university librarians, university research development professionals, platform providers, and more.

Recurring themes:

- How do we convince experts to keep their profiles current and complete?
- How do we measure the return on investment for expert finder systems?
- How do we build support for expert finder systems among universities, researchers, the public sector, and the business community?

- What challenges are presented by the current state of EFS-related technologies? What needs to happen in order to make expert finder systems both more robust and more relevant and to maximize their use in building research collaborations and industry-university partnerships?

Town Hall Time

Holly J. Falk-Krzesinski of Elsevier facilitated a town hall discussion to close the forum. After a brief recap of themes that had arisen during the meeting, she established two avenues for conversation—systems and community—and asked participants to contribute their thoughts through a “fishbowl” format.

Theme 1: Systems

Question: How do we ensure that researchers are understanding the importance of their data in securing the future of their research and that of the university?

“How do we ensure a concept of research information citizenship that goes beyond our own individual activities...?”

– Simon Porter, forum participant

Community Contributions:

- One participant rephrased the question: “How do we ensure a concept of research information citizenship that goes beyond our own individual activities and understands that our information flows through systems and is used for different purposes?”
- An attendee noted that EFS profiles are not typically important to researchers because working on them takes time away from their research. So it is important to help researchers think about their data as a resource that may be re-used in many ways, rather than as a task.
- Another attendee focused on the need for value metrics for EFS. His office currently uses page views, but he would much prefer a more meaningful metric: “We know people like our site, but we don’t know how to tell them how much it’s worth.”
- One participant suggested longevity of the profile’s URL as a metric—that the profile should persist and effectively represent that researcher for at least as long as they are at that institution.
- An attendee whose system was only recently installed would like to be able to know, “Of the people who came to our portal, how many of them emailed to a researcher, how many went away not getting anything out of it, how many actually found a person to work with?”

Question: Who do you include in your EFS? Any non-faculty researchers? Why yes/why no?

Community Contributions:

- One institution began with only faculty, then soon added postdoctoral researchers to the system. Because those groups are governed by certain bodies at the institution, it was relatively easy to communicate with them and get them to create their profiles. But anyone at the university who wants to create a profile may do so, which means that experts other than researchers are also in the system.

- One attendee pointed out a group of experts that are not typically included in expert finder systems but that may be particularly valuable to business users of EFS—adjunct faculty members, who tend to work in specialized technical fields and have the real-world experience that makes them good candidates for university/business collaborations.
- One institution includes all faculty of any type (tenure track, adjunct, etc.), plus postdocs. Because of FERPA, they don't put graduate students in their system automatically, but graduate students may opt in. This institution also includes professional staff at all levels because those people are collaborating on projects and grants.
- Another institution typically includes only people who have published at least three papers—as a sort of baseline validation of a certain level of expertise.

Question: What is the role of the human element in making the most of the technology?

Community Contributions:

- The two people who addressed this both said their institutions have invested in staff who do outreach and training with faculty and that it definitely pays off to encourage faculty to “own” their profiles.

Theme 2: Community

Question: Where do we go from here as an EFS community?

Community Contributions:

This conversation focused on whether there would be future EFS forums and, if so, what shape they might take. There seemed to be broad support for continuing the connections created at the forum, but many questions about the logistics of doing so. In particular, several participants expressed concern that in future years it might be too difficult to find the time and money to travel to an EFS forum held as a separate event.

Co-locating the EFS event with another conference could cut down on travel time and costs while potentially raising the profile of the EFS event. But would it also sacrifice one of the benefits of the forum—the opportunity to network with people from different parts of the EFS community?

Several participants suggested attaching the forum to another event, such as a conference sponsored by VIVO, the National Organization for Research Development, the Network of Academic Corporate Relations Officers, or the International Network for the Science of Team Science.

- Co-locating would cut down on travel time and costs. It might also raise the profile of the EFS event to have it associated with and marketed to the audiences for one of these other events.
- However, some speakers were concerned that tying a future EFS event to one of these more audience-specific conferences would make it more narrow and likely sacrifice one of the benefits of the forum—the opportunity to network with people from different parts of the EFS community.

One person noted that future options for the forum would have to address the matter of financing. The 2019 forum relied on sponsor funding, as registration fees did not cover the actual cost of attendance, especially since meals were included. Additionally, most of the organizing work was done by members of a self-identified steering committee. Would that group still be involved? Would its membership remain the same?

No decisions were made during the forum. However, the steering committee continues to pursue possibilities for future expert finder systems meetings. Attendees received a survey after the forum that included questions about the viability of future meetings.

Forum Feedback

Twenty-nine people completed the post-forum survey. Below is a summary of their feedback.

Attendee Profile

Fourteen of the respondents were EFS administrators, 5 were vendors, 3 were users, and 7 have other roles. Seven attendees represented a university research organization and 5 were university library representatives, while the rest were scattered among economic development, private sector, university corporate engagement, faculty development, and other types of organizations.

Attitudes toward Forum

Respondents were asked: “How valuable was the forum to you?”

On a scale with 0 being “Not Valuable” and 10 being “Extremely Valuable,” 27 of the 29 respondents rated the value of the forum at 7 or above.

Similarly, when asked if the forum met their objectives, with 0 being “Not at All” and 10 being “Extremely Well,” 28 respondents rated the forum at 7 or above.

“I appreciated having the opportunity to hear about how other systems are administered and managed. Also liked the opportunity to network and meet with all the various types of people involved in developing and administering EFS for their states, institutions, and companies.”

– Survey respondent

Respondents were also asked, “How likely are you to recommend the forum to a colleague?” The scale went from 0 for “Would Not Recommend” to 10 for “Strongly Recommend.” A total of 26 people rated the forum at 7 or higher in this category.

Strengths of Forum and Areas for Improvement

What did you like about the forum?

- Diversity of presenters, attendees, and perspectives—in particular the mix of university research and economic development perspectives

- Single-track format, which meant attendees did not have to choose between concurrent sessions
- Relatively small size of group, which increased cohesiveness and facilitated cross-disciplinary exchanges
- Meaningful networking opportunities

How can we improve the forum?

- Include a panel of faculty or other “members” of expert finder systems to elicit their perspectives
- Offer more conversations about establishing ongoing resources and about costs, complexity, sustainability, and how to measure success
- Build in an opportunity for particular user groups to meet concurrently
- Put more focus on products, perhaps through demos or a vendor showcase
- Offer sessions about the technical challenges of running an EFS and acquiring and managing data

Future of the Forum

Respondents were about evenly split on whether the EFS forum should be held every year or every other year. With the thought of possibly combining a future EFS event with an already existing conference, respondents were asked which of several conferences they regularly attend. There was little commonality in responses to this question, with the National Organization of Research Development Professionals at 4, VIVO at 2, and numerous other conferences registering 1 attendee who also attended the forum.

Forum Program

Day 1

Keynote Address: Present and Future Trends in Expert Finder Systems

Robert H. McDonald, Dean of University Libraries and Professor of Library Administration, University of Colorado Boulder

Panel: Current Research—EFS Community Building

Dong Joon Lee, Texas A & M University Libraries
 Besiki Stvilia, Florida State University, School of Information
 Shuheng Wu, Queens College, Graduate School of Library and Information Studies

Stay Connected

Learn more: expertfindersystems.org/

View slides from forum presentations: expertfindersystems.org/speakers.html

Get information: Amy Finley at afinley@fsu.edu

Join the conversation: efsforum.slack.com

Panel: Making the Most of Institutional Data for Assembling and Evaluating Scientific Teams

Dave King, Exaptive
Simon Porter, Digital Science
Griffin Weber, Harvard Medical School

Panel: Value Proposition & Sustainability Challenges

Jeff Agnoli, Ohio State University, Office of Research
Everton Henriques, FuzeHub
Matt Moericke, Academic Analytics

Panel: The Library's Role in Research Information Management Systems

Mike Conlon, University of Florida/VIVO
Janet Fransen, University of Minnesota Libraries
Anne Rauh, Syracuse University Libraries
Devin Soper, Florida State University Libraries

Day 2

Keynote Address: Some Assembly Required—Team Recommender Systems and the Future of Work

Noshir Contractor, Jane S. & William J. White Professor of Behavioral Sciences in the McCormick School of Engineering & Applied Science, the School of Communication, and the Kellogg School of Management at Northwestern University

Panel: Creating an Economic Development EFS: Opportunities, Considerations, Lessons Learned

Coleen Burrus, Princeton University
Kathryn Kelley, Ohio Manufacturing Institute at Ohio State University
Sperry Krueger, North Carolina Biotechnology Center
Kim Lloyd, FuzeHub

Panel: Maximizing Expert Finder Systems to Strengthen Innovation and Entrepreneurship

Jim Bray, Northwestern University
Cris Johnsrud, Pathfinder Research
Carol Ann Dykes Logue, Central Florida Research Park Incubator/University of Central Florida
Danny Norman, Tennessee Manufacturing Extension Partnership/University of Tennessee

Town Hall Meeting: Where Do We Go from Here?

Facilitator: Holly J. Falk-Krzesinski, Elsevier
This was an opportunity for attendees to describe successes and challenges, ask questions, and share ideas for the future—with the aim of building a community of practice for expert finder systems.

EFS Systems and Platforms

The tables below include only systems and platforms represented by EFS forum attendees.

Systems

Title	State/Institution	URL	Contact	Email
CU Experts	University of Colorado Boulder	https://experts.colorado.edu	Alex Viggio Liz Tomich	alex.viggio@colorado.edu tomich@colorado.edu
EFS for Manufacturing	Manufacturing Extension Partnership	https://se.linkedin.com/in/dannynorman1/de	Daniel Norman	dnorman3@utk.edu
Experts@Minnesota	University of Minnesota	https://experts.umn.edu	Jan Fransen	fransen@umn.edu
Experts@Syracuse	Syracuse University	https://experts.syr.edu/	Anne Rauh	aerauh@syr.edu
Florida ExpertNet	Florida (multi-university)	http://expertnet.org	Amy Finley	afinley@fsu.edu
FuzeHub	New York	https://fuzehub.com/	Kim Lloyd	kim@fuzehub.com
Harvard Catalyst Profiles	Harvard University	https://connects.catalyst.harvard.edu/profiles/search/people	Griffin Weber	weber@hms.harvard.edu
Northwestern Scholars	Northwestern University	https://www.scholars.northwestern.edu/en/	Ruth Allee	r-allee@northwestern.edu
Ohio Innovation Exchange	Ohio (multi-university)	https://www.ohioinnovationexchange.org/	Tim Cain	caint@ohio.edu
OHSU Experts	Oregon Health & Science University	https://ohsu.pure.elsevier.com	Rachel Dresbeck	dresbeck@ohsu.edu
Research with NJ	New Jersey (multi-university)	https://www.researchwithnj.com/	Coleen Burrus	cburrus@princeton.edu
Research with Rutgers	Rutgers University	https://www.researchwithrutgers.com/	Paul Copeland	paul.copeland@rutgers.edu
Scholars@Duke	Duke University	https://scholars.duke.edu/	Julia Trimmer	julia.trimmer@duke.edu
Scholars@FIU	Florida International University	Coming soon!	Bryan Cooper	lbcooper@fiu.edu
VIVO UF	University of Florida	https://vivo.ufl.edu	Mike Conlon	mconlon@ufl.edu

Platforms

EFS Solution	URL	Contact	Email
Academic Analytics	https://academicanalytics.com/	Brenda Cooper	Bcooper@academicanalytics.com
Clarivate Analytics	https://clarivate.com/	Ann Beynon	Ann.beynon@clarivate.com
Digital Science	https://www.digital-science.com/	Martha Golubock	m.golubock@digital-science.com
Elsevier Pure	https://www.elsevier.com/solutions/pure	Joyce Lifland	j.lifland@elsevier.com
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ExLibris	https://www.exlibrisgroup.com/	Eddie Neuwirth	eddie.neuwirth@exlibrisgroup.com
Expertise Finder	https://expertisefinder.com/	Stavros Rougas	stavros@expertisefinder.com
Profiles Research Networking Software	http://profiles.catalyst.harvard.edu	Griffin Weber	weber@hms.harvard.edu
VIVO Project	http://vivoweb.org	Michael Conlon	mconlon@ufl.edu

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