



## Governing Board Paper

[2017-Dec.telecon-5-002]

# 2018 Plan & Budget

### Background:

This document sets out the proposed 2018 budget for core funds presented under the Goals of the *Strategy to 2020*, which provide the framework for all centrally managed activities and spending. Brief justifications for specific areas of the proposed budget are given in this document, but the overall justification – the ‘plan’ of the Plan & Budget – is provided by the document ***Strategy to 2020: Definitions of success by 2020, an assessment of progress, and a framework for work remaining*** and the ***Strategy to 2020 Targets for 2018***.

Since the launch of the *Strategy to 2020* in 2014, the principal role of the Central Executive Team (CET) has been to lead on behalf of the organization the projects for operationalizing and delivering the *Strategy to 2020* Objectives. In 2018, the transition to a more operational and support function for the CET will begin, with re-allocation of staff to support the new CRG Networks; the implementation of sustainable, long-term product development processes for Cochrane products; and the designation of non-staff funds from the development to the maintenance and integration of technology.

As Figure 1 below shows, the budget for 2018 is focussed on Goals 1 and 4, with increased funding in 2018 under Goal 1 to support the implementation of the CRG Transformation Programme. This is in line with the CET’s leadership roles in editorial and content production oversight, facilitation and support; technology development; learning and support; business management; structure and function reform and membership development. CET staff time has been split by Objective for 2018 to provide the Board with a clear picture of the associated costs required to deliver each of the parts of the *Strategy to 2020*. These costs do not constitute single posts, but a split of effort for those staff associated with or contributing to that Objective and the related proportion of salary costs. Project/operational costs are non-staff (including consultancy) costs associated with a particular programme of activity, and ‘other team costs’ are predominantly made up of department travel and running costs.

This Plan & Budget, alongside the *Strategy to 2020 Targets for 2018* and financial scenario planning documents, aims to give the Governing Board the key strategic and operational information it needs to assess the activities and expenditure Cochrane will make in 2018.

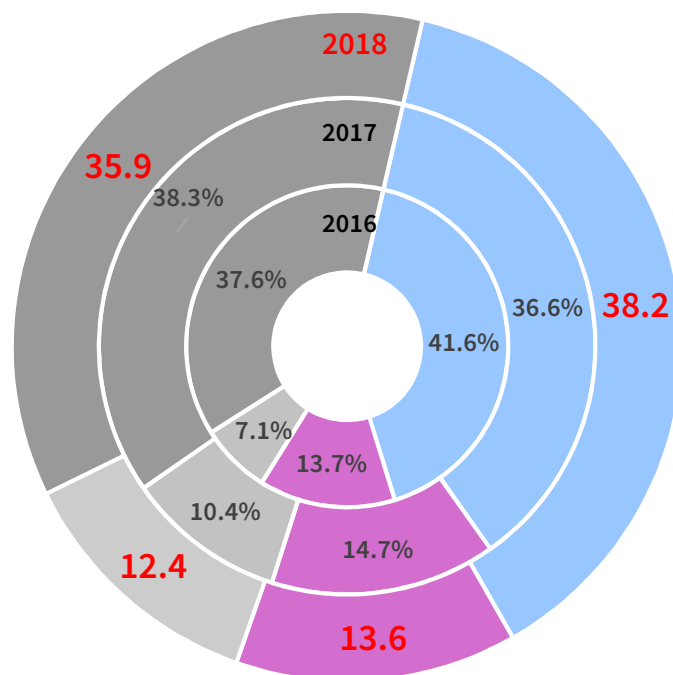


Figure 1. Percentage split of budget by Goal in 2018, with budget 2017 and budget 2016 comparisons

- Goal 1: Producing Evidence
  - Goal 3: Advocating for Evidence
- Goal 2: Making Evidence Accessible
  - Goal 4: Effective & Sustainable Organization

## GOAL 1: PRODUCING EVIDENCE

To produce high-quality, relevant, up-to-date systematic reviews and other synthesized research evidence to inform health decision-making.

Goal 1 - Producing Evidence						
	1.1	1.2	1.3	1.4	1.5	1.6/1.7
	High Quality	Relevant	Up to Date	Wide Coverage	Pioneering Methods	Efficient Production
<b>Project Costs</b>	-187,225	0	0	-75,000	-302,988	-382,623
<b>Goal 1 Project Costs</b>						<b>-947,836</b>
<b>Staff Costs</b>	-531,076	-69,416	-75,827	-65,158	-168,940	-709,750
<b>Goal 1 Staff Costs</b>						<b>-1,620,165</b>
<b>Other Team Costs</b>	-31,098	-4,933	-8,502	-4,500	-17,934	-156,341
<b>Total by Objective</b>	<b>-749,395</b>	<b>-74,348</b>	<b>-84,329</b>	<b>-144,658</b>	<b>-489,862</b>	<b>-1,284,714</b>
<b>Total by Goal</b>						<b>-2,791,306</b>
<b>Percentage of Overall Total</b>						<b>38.2%</b>

Proposed expenditure under Goal 1 is focused around editorial and content quality assurance, and technology development and maintenance, to support efficient production and the development of new products. In addition, there continues to be significant investment in methods development and funding support for the Methods community.

Staff costs under High Quality include one new **Associate Editor** post approved within the CRG Transformation Programme, which will support the work of the CRG Networks in addition to the re-allocation of existing CEU staff.

### PROJECT/OPERATIONAL COSTS UNDER GOAL 1:

- **High Quality:** Implementation of [CRG Structure and Function](#) reforms (£187k).
- **Wide Coverage:** [Review Support Programme](#) (£75k).
- **Pioneering Methods:** [Methods Innovation Fund 2](#) (£27,490); [Strategic Methods Fund](#) (£160k); Cochrane [Handbooks development](#) (£25k); [Methods training](#) (£20k); Methods Journal development (£15k); DTA reviews support (£12k); Support for first Scientific Committee meeting (£7k); maintenance and development of [Linked Data](#) infrastructure (£72k – split across Objectives 1.5 and 1.6).
- **Efficient Production:** [Cochrane Register of Studies](#) ongoing development and maintenance, and CENTRAL delivery (£90,500); ongoing maintenance for Transform infrastructure (£40k); consultancy costs for development of standardized technology workflow (proposed Target 2 for 2018) (£20k); EPPI-Reviewer maintenance (£8.4k); Implementation of [CRG Structure and Function](#) reforms (£187k).

## GOAL 2: MAKING OUR EVIDENCE ACCESSIBLE

To make Cochrane evidence accessible and useful to everybody, everywhere in the world.

Goal 2 - Making our Evidence Accessible				
	2.1 - 2.3	2.4	2.5	2.6
	User Centred Design & Delivery	Open Access	Accessible Language	Multi-Lingual
<b>Project Costs</b>	-197,000	0	-10,000	-173,000
<b>Goal 2 Project Costs</b>				<b>-380,000</b>
<b>Staff Costs</b>	-258,364	-38,497	-49,938	-165,542
<b>Goal 2 Staff Costs</b>				<b>-512,340</b>
<b>Other Team Costs</b>	-56,061	-6,531	-1,257	-33,551
<b>Total by Objective</b>	-511,424	-45,028	-61,195	-372,093
<b>Total by Goal</b>				<b>-989,741</b>
<b>Percentage of Overall Total</b>				<b>13.6%</b>

Proposed expenditure under Goal 2 will support the development of the technology required to produce and deliver content via the Cochrane Library and other products, the implementation of the Knowledge Translation framework, and translations work across the organization.

In 2018, the content management system used for translated content will be switched for a new one; a process led by the CET and involving all translation teams. In 2017 (to October), funding to translation teams has supported an increase from 900,000 to 1.4 million non-English language page views on Cochrane.org on the same period in 2016.

### PROJECT/OPERATIONAL COSTS UNDER GOAL 2:

- **User Centred Design & Delivery:** Centralized citations search support for publication in CENTRAL (£22k); Support for user testing of product enhancements (£25k); Support for implementation of the [Knowledge Translation framework](#) (£120k).
- **Accessible Language:** Further research consultancy for [Plain Language Summaries](#) (£10k).
- **Multi-lingual:** [Targeted funding for translations teams, and translation content management system](#) (£173k).

## GOAL 3: ADVOCATING FOR EVIDENCE

To make Cochrane the ‘home of evidence’ to inform health decision-making, build greater recognition of our work, and become the leading advocate for evidence-informed health care.

Goal 3 - Advocating for Evidence					
	3.1	3.2	3.4-3.6	3.7	3.8
	Global Profile	Home of Evidence	Global Advocate	Global Partner	Global Impact
<b>Project Costs</b>	0	-260,000	0	-24,000	0
<b>Goal 3 Project Costs</b>					<b>-284,000</b>
<b>Staff Costs</b>	-267,699	-102,836	-36,779	-77,934	-58,190
<b>Goal 3 Staff Costs</b>					<b>-543,437</b>
<b>Other Team Costs</b>	-39,385	-16,619	-4,944	-8,824	-5,476
<b>Total by Objective</b>	-307,084	-379,455	-41,723	-110,757	-63,666
<b>Total by Goal</b>					<b>-902,685</b>
<b>Percentage of Overall Total</b>					<b>12.4%</b>

Proposed expenditure under Goal 3 will support the ongoing development of the enhanced Cochrane Library and the establishment of new product development and management processes in the CET, with the aim of more regularly and rapidly delivering features and enhancements to Cochrane products.

The staff costs in 2018 include funding for two new posts that would support these new processes: **Cochrane Library Product Manager** and **Business Analyst** positions. However, the exact configuration of the CET staff structure will be confirmed by the Senior Management Team in 2018. Although the funds are requested in this Plan & Budget, we hope to secure additional funding from Wiley to cover the expenditure as part of the contract extension negotiations which are ongoing.

### PROJECT/OPERATIONAL COSTS UNDER GOAL 3:

- **Home of Evidence:** Cochrane Library new platform development associated costs (£210k); Establishment of next phase of collaboration with [Epistemonikos](#), for the development, maintenance and use of new features in the Enhanced Cochrane Library (£50k).
- **Global Partner:** Funding to support the development of [partnerships](#) (£24k).

## GOAL 4: BUILDING AN EFFECTIVE & SUSTAINABLE ORGANIZATION

To be a diverse, inclusive and transparent international organization that effectively harnesses the enthusiasm and skills of our contributors, is guided by our principles, governed accountably, managed efficiently and makes optimal use of its resources.

Goal 4 - Building an Effective & Sustainable Organization							
	4.1	4.2	4.3	4.4	4.5	4.6	4.7
	Inclusive & Open	Global & Diverse	Financially Strong	Efficiently Run	Investing in People	Transparently Governed	Environmentally Responsible
<b>Project Costs</b>	-127,000	-67,000	0	-78,500	-79,800	-252,500	0
<b>Goal 4 Project Costs</b>							<b>-604,800</b>
<b>Staff Costs</b>	-53,377	-65,504	-370,785	-505,291	-206,235	-121,028	-17,678
<b>Goal 4 Staff Costs</b>							<b>-1,339,878</b>
<b>Other Team Costs</b>	-22,169	-16,836	-184,498	-268,230	-103,748	-75,391	-4,055
<b>Total by Objective</b>	-202,546	-149,341	-555,263	-852,020	-389,783	-448,919	-21,733
<b>Total by Goal</b>							<b>-2,619,605</b>
<b>Percentage of Overall Total</b>							<b>35.9%</b>

Proposed expenditure under Goal 4 principally supports Cochrane governance, sponsored registration for Cochrane Groups to attend the 2018 Colloquium, the ongoing rollout and development of the CRG Transformation Programme, and the further development of the Membership Scheme.

Further funds are requested for the development of new learning resources aligned with high priority work streams, including the program of learning for Editors and in support of the Cochrane Content Strategy.

Small amounts of ongoing funding to support regional capacity building (primarily in relation to travel and events hosting) are listed, as are the projected costs of the CET's London office move (which will take place in early 2019).

#### PROJECT/OPERATIONAL COSTS UNDER GOAL 4:

- **Inclusive & Open:** Support for further [membership scheme development](#) (£10K); Sponsored registration for Cochrane Groups to attend the Colloquium (£114k); Consumer co-ordination support expenses (£3k).
- **Global & Diverse:** Support for regional capacity building (£15k); Cochrane's support for the multi-organization [Global Evidence Synthesis Initiative](#) (£15k); Stipends for consumer and LMIC participants to attend Colloquia (£32k).
- **Efficiently Run:** CRG support expenses (£22k CET financial infrastructure upgrade and office move (London) (£34k); Governance Meetings support 2018 (£22.5k).
- **Investing in People:** [eLearning and Learning Content development](#) (£79.8k).
- **Transparently Governed:** Governing Board (including Board development), Council and Executive budgets (£240k); Governance Meetings support 2018 (£22.5k).

