

# 2017 Plan & Budget

## Summary

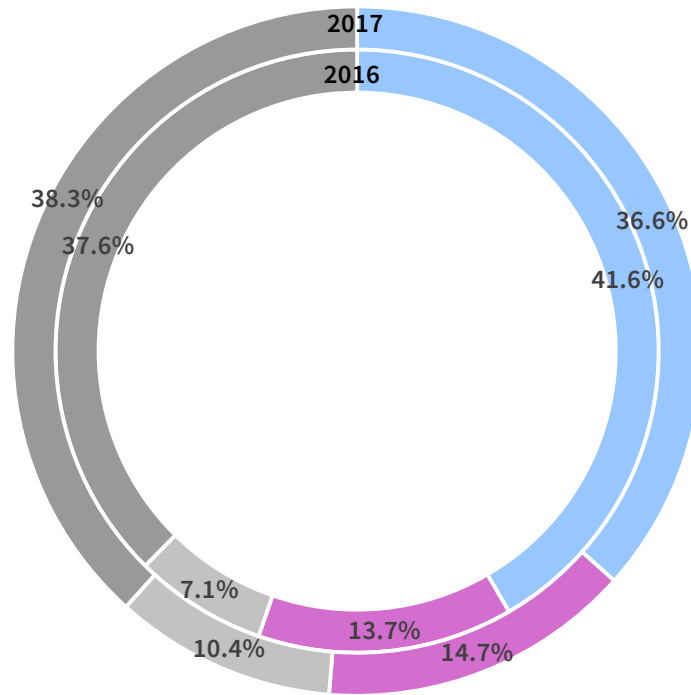
This document sets out in full the 2017 Budget for core funds presented under the Goals of the *Strategy to 2020*, which provide the framework for all centrally managed activities and spending. Brief justifications for specific areas of the proposed Budget are given in this document, but the overall justification – the ‘Plan’ of the Plan & Budget – is provided by the document ***Strategy to 2020 in 2017: Definitions of success by 2020, an assessment of progress, and a framework for work remaining.***

Since the launch of the *Strategy to 2020* in 2014, the principal role of the Central Executive Team has been to lead on behalf of the organization the planning and development work for operationalizing and delivering the *Strategy to 2020* Objectives, and this will continue until the end of 2017 – as detailed by the proposed Target areas for 2017. At the end of 2017, as the *Strategy to 2020 in 2017* document shows, it is expected that the planning and intensive development stages will be nearing completion for nearly all of the Objectives. After that point the CET will have a greater role to play in supporting the delivery and implementation of the new technologies, processes, and policies across Groups and the wider Cochrane community. Delivery of *Strategy to 2020*'s 28 Objectives can, on the whole, only be considered complete – and successful – once the whole community has adopted them. Whilst the CET will continue to play a leadership role in further strategy development to 2020 and beyond, as well as maintenance, coordination and oversight of the new initiatives developed through the *Strategy*, the Senior Management Team is preparing for a reduction in core expenditure through 2018 based on current levels of income and the rate of draw-down on reserves.

As Figure 1 below shows, the budget for 2017 is focussed on Goals 1 and 4. This is in line with the number of Objectives the Senior Management Team has identified as being critical to the organization's mission and is representative of the CET's leadership roles in editorial oversight, technology development, learning and support, business management, structure and function reform and membership development. CET staff time has been split by Objective for 2017 to provide the Cochrane community with a clear picture of the associated costs required to deliver the *Strategy to 2020*. Line items do not constitute a single post, but a split of effort for all staff associated with that Objective and the related proportion of salary costs. Project costs are non-staff (including consultancy) costs associated with a particular programme of activity, and ‘other team costs’ are predominantly made up of departmental travel and running costs.

Of the £7 million in this Governing Board-approved 2017 budget, 24% - £1.7 million - will be returned directly to Cochrane Groups via funding programmes for methods development, translations, training, and review production; and also for governance, centralized support to Managing Editors and Information Specialists, and commissioned work for various *Strategy to 2020* projects. This funding will supplement the £15 million that it is expected Groups will generate themselves in 2017 (based on current funding levels) to conduct activities in furtherance of Cochrane's mission.

Figure 1. Percentage split of budget by Goal in 2017, with 2016 comparison



- Goal 1: Producing Evidence
- Goal 2: Making Evidence Accessible
- Goal 3: Advocating for Evidence
- 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>	0	0	0	-75,000	-471,563	-231,500
<b>Goal 1 Project Costs</b>						-778,063
<b>Staff Costs</b>	-531,045	-68,780	-68,146	-56,821	-123,111	-760,960
<b>Goal 1 Staff Costs</b>						-1,608,863
<b>Other Team Costs</b>	-54,922	-5,366	-6,543	-4,817	-13,361	-109,895
<b>Total by Objective</b>	<b>-585,967</b>	<b>-74,147</b>	<b>-74,689</b>	<b>-136,638</b>	<b>-608,042</b>	<b>-1,102,355</b>
<b>Total by Goal</b>						<b>-2,581,838</b>
<b>Percentage of Overall Total</b>						<b>36.6%</b>

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

Two of the three new posts for the CET in 2017 are allocated primarily to activities under Goal 1:

### Junior Systems Administrator (IKMD)

As our technology systems grow larger, more complex, and more interconnected, with the addition of the author support tools; CRS and RevMan Web; linked data tools; membership systems; training and learning; and other systems; maintaining robust, secure, and available web applications, sites, and services will be critical. This person will support the Senior Systems Administrator in that role.

### APIs and Integration Developer (IKMD)

This post is fixed term to the end of 2017 and the plan is to start them in Quarter 2. This person will work on further integration of our systems for review production as well as, critically, the technical implementation of the membership management system.

### PROJECT COSTS UNDER GOAL 1:

- **Wide Coverage:** [Review Support Programme](#) (£75k).
- **Pioneering Methods:** [Methods Innovation Fund 2](#) (£83,563); [Strategic Methods Fund](#) (£200k); Cochrane [Handbooks development](#), including transfer of Interventions Handbook online (£50k); [Methods training](#) (£20k); Methods Journal development (£18k); [Linked Data development](#) – ontology development and the PICO annotation of all Cochrane Reviews (£90k); Support to establish a Scientific Committee – a [Structure & Function reform](#) (£10k).
- **Efficient Production:** [Cochrane Register of Studies](#) web version development, and ongoing CENTRAL delivery (£121,500); Third-year funds for Project Transform (£60k); Editor training and accreditation (£50k).

## 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>	-49,000	0	-10,000	-212,179
<b>Goal 2 Project Costs</b>				-271,179
<b>Staff Costs</b>	-345,787	-69,745	-69,431	-197,311
<b>Goal 2 Staff Costs</b>				-682,274
<b>Other Team Costs</b>	-48,614	-7,369	-2,033	-21,923
<b>Total by Objective</b>	<b>-443,402</b>	<b>-77,114</b>	<b>-81,464</b>	<b>-431,413</b>
<b>Total by Goal</b>				<b>-1,033,392</b>
<b>Percentage of Overall Total</b>				<b>14.7%</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 development of a Knowledge Translations strategy, and translations work across the organization.

In 2015, the Board approved a pilot to fund translation teams in an effort to make the translation efforts more sustainable. This year, £120,000 is in the budget to continue this funding for the teams in 2017 (the rest of the budget is spent on the translation management system and central translation co-ordination, management and support).

In 2016, the Translations Co-ordinator ran a survey of the community translation teams and they reported that funding of personnel for half-time or one day a week made a significant contribution to their ability to produce and disseminate translations. Average monthly production has risen from 363 in 2015 to 416 in 2016 with a huge increase in dissemination activities by these teams that has contributed to the large increases in traffic on Cochrane.org, which has risen by 67% in the last 12 months. Page views from non-English browsers now account for 64% of all visits to Cochrane.org, up from 2% in 2012.

### PROJECT COSTS UNDER GOAL 2:

- **User Centred Design & Delivery:** Centralized citations search support for publication in CENTRAL (£29k); Support for the development of a [Knowledge Translation strategy](#) (£20k).
- **Accessible Language:** Further research consultancy for [Plain Language Summaries](#) (£10k).
- **Multi-lingual:** [Targeted funding for translations teams](#) (£120k); [translations content management system](#) (£92,179).

## 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	-115,000	0	-20,000	0
<b>Goal 3 Project Costs</b>					-135,000
<b>Staff Costs</b>	-253,968	-104,837	-37,529	-88,545	-60,671
<b>Goal 3 Staff Costs</b>					-545,551
<b>Other Team Costs</b>	-26,049	-12,211	-3,145	-6,456	-4,598
<b>Total by Objective</b>	<b>-280,017</b>	<b>-232,048</b>	<b>-40,674</b>	<b>-115,001</b>	<b>-65,269</b>
<b>Total by Goal</b>					<b>-733,009</b>
<b>Percentage of Overall Total</b>					<b>10.4%</b>

Proposed expenditure under Goal 3 will support the Central Executive Team in further increasing Cochrane’s global profile and outreach (Quarter 3 2016 saw the largest quarterly international media coverage for Cochrane); the organization - with the South African Cochrane Centre - of the Global Evidence Summit in September 2017; and the extensive partnership development work (see the Cochrane Partnerships Report for more details).

It will provide the internal communications capacity for Cochrane that is critical to supporting the organization through the reforms associated with the delivery of the *Strategy to 2020* Objectives.

It will also support the development of the enhanced Cochrane Library as the ‘Home of Evidence’, including the development of a collaboration with [Epistemonikos](#). The first joint project will be the inclusion of a federated search of the Epistemonikos database in the Cochrane Library. The overarching aim of the partnership is to improve the knowledge base for those making decisions in healthcare, leading to better-informed choices by policymakers, practitioners and the public, and thus to better health outcomes for people throughout the world.

### PROJECT COSTS UNDER GOAL 3:

- **Home of Evidence:** Cochrane Library new platform development (£30,000); Establishment of a collaboration with [Epistemonikos](#), for the development, maintenance and use of new features in the Enhanced Cochrane Library, including a federated search of the Epistemonikos database in 2017 (£85k).
- **Global Partner:** Funding to support the development of [partnerships](#), including hosting a meeting with WHO, Wikipedia internships, and a [Task Exchange](#)-Guidelines International Network link-up.

## 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>	-146,500	-62,000	0	-337,750	-136,481	-175,375	0
<b>Goal 4 Project Costs</b>							-858,106
<b>Staff Costs</b>	-90,336	-78,253	-192,447	-438,454	-297,788	-54,334	-33,441
<b>Goal 4 Staff Costs</b>							-1,185,053
<b>Other Team Costs</b>	-24,857	-16,384	-142,332	-253,806	-87,024	-121,312	-10,998
<b>Total by Objective</b>	<b>-261,693</b>	<b>-156,637</b>	<b>-334,778</b>	<b>-1,030,010</b>	<b>-521,293</b>	<b>-351,021</b>	<b>-44,440</b>
<b>Total by Goal</b>							<b>-2,699,892</b>
<b>Percentage of Overall Total</b>							<b>38.3%</b>

Proposed expenditure under Goal 4 will support the establishment of the membership scheme, new governance structures, expanded and enhanced learning and support for Cochrane collaborators, increased fundraising and revenue generation, and regional capacity building.

Additional administrative support for Cochrane's Governing Board and the new Cochrane Council will be provided through an additional **Administrative Support** post (**FCS**).

Critically, funding under Goal 4 will support the Structure & Function reforms to all Cochrane Groups that are essential in positioning the organization as a whole to deliver on all its other strategic objectives in the coming years.

A significant proportion of the 'project' costs under Goal 4 will be transferred directly for the community to attend Colloquia and business meetings.

#### PROJECT COSTS UNDER GOAL 4:

- **Inclusive & Open:** Remaining costs of implementing the [membership scheme](#) (£30K); Sponsored registration for Cochrane Groups to attend the Colloquium (£114k); CSG Discretionary Fund top-up (£2,500).
- **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:** [Structure & Function reforms](#) (£291,500); CET planning and training meeting (£26,250); Project management (£20,000).
- **Investing in People:** Ongoing costs for the [Training & Professional Development Strategy](#), including small grants to support local community training and a mentoring scheme (£136,481).
- **Transparently Governed:** Governing Board, Council and Executive budgets (£100k); Mid-year business meeting support (£60,375); Co-Eds travel support (£15k).

	TOTALS	Goal 1 - Producing Evidence						Goal 2 - Making our Evidence Accessible				Goal 3 - Advocating for Evidence						
		1.1	1.2	1.3	1.4	1.5	1.6/1.7	2.1 - 2.3	2.4	2.5	2.6	3.1	3.2	3.4-3.6	3.7	3.8		
<b>Project Costs</b>	-2,042,348	0	0	0	-75,000	-471,563	-231,500	-49,000	0	-10,000	-212,179	0	-	0	-20,000	0		
<b>Project Costs by Goal</b>								-778,063					-271,179					
<b>Staff Costs</b>	-4,021,741	-531,045	68,780	68,146	-56,821	-123,111	-760,960	-345,787	-69,745	-69,431	-197,311	253,968	-	-	37,529	-88,545	-60,671	
<b>Staff Costs by Goal</b>								-1,608,863					-682,274					
<b>Other Team Costs</b>	-984,022	-54,922	-5,366	-6,543	-4,817	-13,368	-109,895	-48,614	-7,369	-2,033	-21,923	-26,049	-12,211	-3,145	-6,456	-4,598		
<b>Total by Objective</b>		--	-	-	-	-	-	-	-	-	-	-	--	-	-	-		
		585,967	74,147	74,689	136,638	608,042	-1,102,355	-443,402	77,114	81,464	-431,413	280,017	232,048	40,674	-113,001	-65,269		
<b>Total by Goal</b>	7,048,123							2,581,838					1,033,392					
<b>Percentage of Overall Total</b>								36.6%					14.7%					



	TOTALS	Goal 1 - Producing Evidence						Goal 2 - Making our Evidence Accessible				Goal 3 - Advocating for Evidence				
		1.1	1.2	1.3	1.4	1.5	1.6/1.7	2.1 - 2.3	2.4	2.5	2.6	3.1	3.2	3.4-3.6	3.7	3.8
<b>Project Costs</b>	-3,645,255	-91,500	0	-63,024	-250,000	-805,200	-724,690	-86,250	0	-40000	-396,178	0	0	0	-80,473	0
<b>Project Costs by Goal</b>		-1,934,414						-522,428				-80,473				
<b>Staff Costs</b>	-4,405,138	-503,919	69,608	-64,394	-68,215	-120,789	-637,563	-325,148	-75,722	-34,378	-167,457	228,327	-97,110	33,222	-76,760	-64,327
<b>Staff Costs by Goal</b>		-1,464,487						-599,705				-499,746				
<b>Other Team Costs</b>	-114,000	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total by Objective</b>		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total by Goal</b>	-8,164,393	595,419	69,608	127,418	318,215	925,989	-1,362,253	-411,398	72,722	74,378	-563,635	228,327	-97,110	33,222	157,233	-64,327
<b>Percentage of Overall Total</b>		41.6%						13.7%				7.1%				