



## Proposed 2020 Plan & Budget to meet *Strategy to 2020* Goals and Objectives

<b>From:</b>	Mark Wilson, CEO
<b>People Involved in developing the paper:</b>	Senior Management Team
<b>Date:</b>	For consideration at the 12 <sup>th</sup> December 2019 Governing Board teleconference -BOARD APPROVED
<b>For your:</b>	Decision
<b>Access level:</b>	Open access

### Introduction:

This document sets out the proposed *2020 Plan & Budget* for core funds presented under the Goals of Cochrane's [Strategy to 2020](#), which provides the framework for all centrally-managed activities and spending.

More details on the main organizational Targets within the 2020 Plan are provided in the document: *Strategy to 2020 Targets for 2020*. Brief descriptions of 'business as usual' activities are set out in this document alongside each of the different Goals and Objectives to which they relate. Costs are presented against each of the Objectives and these are composed of directly related team and project costs.

This Plan & Budget is presented for the Board's approval.

## GOAL 1: PRODUCING EVIDENCE

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

### 2020 Highlights

#### **STRATEGY TO 2020 TARGET 1: EDITORIAL AND PRODUCTION SYSTEMS PROGRAMME: Provider selection, workflows and roles, and initial implementation phases**

In 2020, three of the five planned projects in a new, large-scale ‘Editorial and Production Systems Programme’ will be undertaken:

Project 1 = Production system tender process (COMPLETED IN 2019)

Project 2 = Editorial & Management System (EMS) evaluation and tender process (COMPLETED IN 2019)

Project 3 = Provider selections for EMS and production systems

Project 4 = Full production workflow creation (EMS + Production + Delivery): defining roles, workflow work, content, translations and other elements

Project 5 = Implementation of new systems (for both production system and EMS, staggered as appropriate into 2021)

#### **STRATEGY TO 2020 TARGET 2: IMPLEMENTATION OF MORE RIGOROUS CONFLICT OF INTEREST POLICIES**

In 2020, new policies that strengthen Cochrane’s approach to financial interests, and clarify our position regarding non-financial interests, will be implemented.

#### **Plus:**

##### **A focus on Research & Editorial Integrity:**

- Implementation of policies: Editorial Charter and Misconduct policies (+COI)
- Training and awareness of policies
- Advocacy for research integrity and transparency
- Support service for high-profile reviews
- Pilots: separation of development and editorial functions and consumer engagement

##### **Diversification of methods, content, and the creation of new databases including:**

- Assessment and planned support to scale up new methods
- Initial approaches to a publishing strategy that will lead to the creation of new databases, such as,

- A new Cochrane Systematic Review Journal
- A new Cochrane Systematic Review Methods Journal
- A new Cochrane Database of Uncertainties

Goal 1 Producing Evidence		Total GBP	All Objectives include Central Executive Team costs, plus the non-staff cost allocations listed below. Note that the non-staff cost allocations split by Objective do not necessarily represent the total budget for an initiative or project, which may be split across a series of Objectives and include staff costs:
1.1	High Quality	1,021,139	Methods strategy £35,000; CRG Network support £80,000; Copy Editorial Service £18,000; Copy Edit Support £168,567; Consumer engagement £4,500.
1.2	Relevant	225,717	Methods strategy £35,000
1.3	Up to Date	217,452	Methods strategy £35,000; Consumer engagement £1,500.
1.4	Wide Coverage	163,994	Review Support Program £40,000
1.5	Pioneering Methods	348,959	Review Support Program £24,000; Handbooks, Standards & Guidance £10,000; Methods strategy £35,000, CRG Network support £80,000; policies Implementation £10,000; publishing strategy £5,000.
1.6/7	Efficient Production	2,162,895	Methods Training £10,000; Scientific Committee £10,000; CRG Network support £80,000; Centralised Editorial Service £18,000; CCA's £5,000; Publishing operations £6,500, Publishing strategy £5,000; Update Classification System £10,000; Managing Editor and Information Specialist support £3,000; Cochrane Register of Studies maintenance and development £100,504, Linked Data £102,500; EPPI Reviewer maintenance and development £8,400; Transform maintenance £37,624; Archie support £180,000; automation project £28,000, Editorial Management System programme £346,920

#### Central Executive Team (CET) supporting operations will include:

- **CRG and Network management**
- **Quality assurance and screening**
- **Support to Editorial Board and Scientific Committee**
- **Editorial policy development**
- **Copy editing and Style Manual**
- **Editorial and publishing resource maintenance and development**
- **Methods leadership**
- **Conflict of Interest management for Cochrane Reviews**
- **Cochrane Library Oversight Committee support**
- **Oversight of the Editorial Management System**

#### CET Resource Breakdown: Goal 1 (% of each CET Department's total expenditure)

Chief Executive Officer's Office	1.2%
Editorial & Methods Department	71.9%
Publishing, Research & Development	28.6%
Knowledge Translation	3.8%
Finance & Contract Services	0%
Information Technology Services	47.1%
People Services	28.6%

- Editorial complaints and feedback
- Cochrane Response

<b>Total Goal 1 - Producing Evidence:</b>	<b>£4,140,156</b>	<b>% of total Expenditure:</b>	<b>36%</b>
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## GOAL 2: MAKING OUR EVIDENCE ACCESSIBLE

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

### 2020 Highlights

#### STRATEGY TO 2020 TARGET 3: CONSULTATION ON OPEN ACCESS FOR COCHRANE REVIEWS

In 2020 there will be a consultation with external and internal stakeholders to achieve a common understanding of the challenges and opportunities for Cochrane in delivering universal, immediate Open Access to Cochrane Reviews whilst continuing to ensure organizational financial sustainability. The outputs of the consultation will directly inform any future revisions to existing policy.

#### STRATEGY TO 2020 TARGET 4: IMPROVING QUALITY, CONSISTENCY AND TRANSLATABILITY OF COCHRANE'S PLAIN LANGUAGE SUMMARIES

Plain Language Summaries (PLSs) are a key dissemination product created and published for every Cochrane Review. Along with the Review Abstract, they are often: 1) the first - or only - contact potential health decision-makers will have with Cochrane as an organization; and 2) the main way health decision-makers will access and gain understanding of a Cochrane Review. They are also the one product that is most frequently translated into other languages. This project aims to determine a new approach and format that simplifies and standardizes Cochrane's PLSs to improve the readability and understandability of Cochrane evidence.

#### Plus:

- Implementation of the new multi-lingual strategy (<https://community.cochrane.org/news/cochrane-multi-language-activities-2019-and-beyond>)

Goal 2 - Making Our Evidence Accessible		Total GBP	All Objectives include Central Executive Team costs, plus the non-staff cost allocations listed below. Note that the non-staff cost allocations split by Objective do not necessarily represent the total budget for an initiative or project, which may be split across a series of Objectives and include staff costs:
2.1-3	User Centred Design and Delivery	995,407	Community engagement £30,000; Consumer engagement £1,500, KT Strategy Implementation £240,891; Cochrane Library PICO Services £70,000.
2.4	Open Access	211,309	Consultation and meetings £58,116.
2.5	Accessible Language	92,813	(Included in staff costs)
2.6	Multi-Lingual	512,382	Consumer engagement £1,500, implementation on new translations strategy (Chinese, French & Spanish, 6 language review summaries) £445,000.

**Central Executive Team (CET) supporting operations will include:**

- **Cochrane Library Product Roadmap, research and development**
- **Editorials, Podcasts, Special Collections**
- **Cochrane Clinical Answers**
- **Knowledge Translation Dissemination products toolkit, guidance and training**
- **Continued global media outreach and engagement - dissemination support for high profile and impactful Cochrane Reviews**
- **Translation teams' support**

<b>CET Resource Breakdown: Goal 2 (% of each CET Department's total expenditure)</b>	
Chief Executive Officer's Office	4.5%
Editorial & Methods Department	9.7%
Publishing, Research & Development	21.4%
Knowledge Translation	45.5%
Finance & Contract Services	0%
Information Technology Services	16.7%
People Services	3.5%

**Total Goal 2 - Making Our Evidence Accessible: £1,811,911**

**% of total Expenditure: 15%**

## 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.

### 2020 Highlights

- Ongoing development and new feature development of the Cochrane Library: <https://www.cochranelibrary.com/about/releases>.
- Organizational advocacy priorities for 2020-2021 approved by the Governing Board in October 2019 will be developed and implemented around:
  - Advocacy for the use of high-quality evidence synthesis in health decision making; and
  - Advocacy for transparency and integrity in research.
- Maintenance of organizational partnerships, guided by the [Cochrane Partnership Policy](#), and the [Guidance for Partnership Development](#).
- In 2020, as we end the current strategy and prepare for the next strategic plan, there will be a specific focus on evaluation of the many *Strategy to 2020* initiatives undertaken over the past seven years, and their value and impact to Cochrane’s internal and external stakeholders. Knowledge Translation monitoring and evaluation work in 2020 will develop theories of change, evaluation plans and tools liaising with diverse stakeholders around the world that will support policy makers, practitioners, the public and researchers to use Cochrane evidence in policy and practice. Further, a monitoring and evaluation framework for Cochrane’s next strategic plan will be established.

Goal 3 - Advocating for Evidence		Total GBP	All Objectives include Central Executive Team costs, plus the non-staff cost allocations listed below. Note that the non-staff cost allocations split by Objective do not necessarily represent the total budget for an initiative or project, which may be split across a series of Objectives and include staff costs:
3.1	Global Profile	225,708	Consumer engagement £1,500; Toronto Colloquium logistics £41,150
3.2-3	Home of Evidence	254,759	Centralised Search £14,800
3.4-6	Global Advocate	104,901	Partnerships & advocacy support £21,250
3.7	Global Partner	215,620	Partnerships & advocacy support £21,250; Cochrane Response £101,629.

<b>3.8</b>	<b>Global Impact</b>	<b>80,352</b>	Consumer engagement £1,500.																
<b>Central Executive Team (CET) supporting operations will include:</b>			<table border="1"> <thead> <tr> <th colspan="2"><b>CET Resource Breakdown: Goal 3 (% of each CET Department's total expenditure)</b></th> </tr> </thead> <tbody> <tr> <td>Chief Executive Officer's Office</td> <td>15.8%</td> </tr> <tr> <td>Editorial &amp; Methods Department</td> <td>2.7%</td> </tr> <tr> <td>Publishing, Research &amp; Development</td> <td>29.2%</td> </tr> <tr> <td>Knowledge Translation</td> <td>31.3%</td> </tr> <tr> <td>Finance &amp; Contract Services</td> <td>0%</td> </tr> <tr> <td>Information Technology Services</td> <td>7.7%</td> </tr> <tr> <td>People Services</td> <td>3.1%</td> </tr> </tbody> </table>	<b>CET Resource Breakdown: Goal 3 (% of each CET Department's total expenditure)</b>		Chief Executive Officer's Office	15.8%	Editorial & Methods Department	2.7%	Publishing, Research & Development	29.2%	Knowledge Translation	31.3%	Finance & Contract Services	0%	Information Technology Services	7.7%	People Services	3.1%
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<ul style="list-style-type: none"> <li>• <b>Maintenance of partnerships and external relations</b></li> <li>• <b>Community websites &amp; support; and outreach and media relations</b></li> <li>• <b>Cochrane Colloquium organization and support</b></li> <li>• <b>Press office and external communications</b></li> <li>• <b>Internal communications and support for change management</b></li> </ul>																			
<b>Total Goal 3 - Advocating for Evidence: £881,340</b>		<b>% of total Expenditure: 8%</b>																	



## 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.

### 2020 Highlights

#### TARGET 5: DEVELOPMENT AND LAUNCH OF A NEW ORGANIZATIONAL STRATEGIC PLAN

In 2020, a new strategic framework and plan will be developed and launched, setting out Cochrane's priorities and decision-making framework from 2021 onwards.

#### Plus:

- Announcement and implementation of new publishing arrangements for the Cochrane Library
- Review of organizational meetings, including Colloquia and events, considering their environmental and social impact
- Improvements to Cochrane's Articles of Association
- Introduction and training on new organizational policies
- Conflict of Interest policy development for organizational interests
- Support to next generation leaders
- Further expansion of geographic networks

Goal 4 - Building an Effective & Sustainable Organisation		Total GBP	All Objectives include Central Executive Team costs, plus the non-staff cost allocations listed below. Note that the non-staff cost allocations split by Objective do not necessarily represent the total budget for an initiative or project, which may be split across a series of Objectives and include staff costs:
4.1	Inclusive & Open	812,176	Membership systems and support; £58,000; Toronto Colloquium support £534,961; Stipends £20,800, Colloquium Sponsored Registrations £74,100; Monitoring & Evaluation £5,000

<b>4.2</b>	<b>Global &amp; Diverse</b>	<b>566,388</b>	Regional Initiatives £38,000; Consumer engagement £1,500, Toronto Colloquium support £246,905; Stipends £9,600, Colloquium Sponsored Registrations £34,200
<b>4.3</b>	<b>Financially Strong</b>	<b>870,356</b>	Governance meeting logistics £20,000
<b>4.4</b>	<b>Efficiently Run</b>	<b>1,452,065</b>	Management meetings £17,500; Governance Meetings and Colloquium meeting travel (sub-set) £14,650.
<b>4.5</b>	<b>Investing in People</b>	<b>574,026</b>	Learning support £69,000, Managing Editor and Information Specialist support £1,000,
<b>4.6</b>	<b>Transparently Governed</b>	<b>543,720</b>	Management meetings £17,500, Governance Meetings and Colloquium meeting travel (sub-set) £14,650; Consumer engagement £1,500, Governing Board £135,000; Council £40,000; Group Executives £62,000; Governance meeting logistics £20,000, governance projects and legal support £40,000.
<b>4.7</b>	<b>Environmentally Responsible</b>	<b>18,063</b>	(Included in team costs)

**Central Executive Team (CET) supporting operations include:**

- Learning, training and support, including User Support Team
- Management and governance support to Groups and members
- IT and web systems infrastructure design, development and maintenance
- Management of relations with the publisher of the Cochrane Library
- Business, governance, finance and contracts management for the organization
- Management of organizational policies
- Fundraising

**CET Resource Breakdown: Goal 4**

**(% of each CET Department's total expenditure)**

Chief Executive Officer's Office	78.5%
Editorial & Methods Department	15.7%
Publishing, Research & Development	20.9%
Knowledge Translation	19.5%
Finance & Contract Services	100%
Information Technology Services	28.5%
People Services	64.8%

**Total Goal 4 – Building an Effective & Sustainable Organization: £4,836,794**

**% of total Expenditure: 41%**

	<b>Goal 1 Producing Evidence</b>	<b>Total</b>		<b>Goal 2 - Making Our Evidence Accessible</b>	<b>Total</b>		<b>Goal 3 - Advocating for Evidence</b>	<b>Total</b>		<b>Goal 4 - Building an Effective &amp; Sustainable Organisation</b>	<b>Total</b>
1.1	High Quality	1,021,139	2.1-3	User Centred Design and Delivery	995,407	3.1	Global Profile	225,708	4.1	Inclusive & Open	812,176
1.2	Relevant	225,717	2.4	Open Access	211,309	3.2-3.3	Home of Evidence	254,759	4.2	Global & Diverse	566,388
1.3	Up to Date	217,452	2.5	Accessible Language	92,813	3.4-6	Global Advocate	104,901	4.3	Financially Strong	870,356
1.4	Wide Coverage	163,994	2.6	Multi-Lingual	512,382	3.7	Global Partner	215,620	4.4	Efficiently Run	1,452,065
1.5	Pioneering Methods	348,959				3.8	Global Impact	80,352	4.5	Investing in People	574,026
1.6/7	Efficient Production	2,162,895							4.6	Transparently Governed	543,720
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	<b>Total Goal 1 - Producing Evidence</b>	<b>4,140,156</b>		<b>Total Goal 2 - Making Our Evidence Accessible</b>	<b>1,811,911</b>		<b>Total Goal 3 - Advocating for Evidence</b>	<b>881,340</b>		<b>Total Goal 4 - Building an Effective &amp; Sustainable Organisation</b>	<b>4,836,794</b>
	<b>% of total Expenditure</b>	<b>36%</b>		<b>% of total Expenditure</b>	<b>15%</b>		<b>% of total Expenditure</b>	<b>8%</b>		<b>% of total Expenditure</b>	<b>41%</b>
										<b>TOTAL GBP (Exc. Innovations)</b>	<b>£ 11,670,201</b>