Strategy for Change Portfolio View: Quarterly Update for Cochrane Central Executive Team

Quarter: 3 (July – September) 2021, reporting on Quarter 2 (April - June)

Priority initiative for 2021	Lead Dept & SMT	Start & end dates	Key activities delivered in Quarter just passed (Q2)	Key activities to be delivered next Quarter (Q3)	Expected future cross-department or project dependencies
GOAL 1: Producing trusted evidence: To produce trusted and timely synthesized evidence addressing the most important questions for health and care decision making					
Objective 1. Delivering timely, high quality responses to priority global health and care questions, which the users of our evidence help define					
COVID-19 response	EMD, ITS – TL & CM	Ongoing	- COVID paper on response to pandemic in 2021 - Public health reviews, update of convalescent plasma published - Series of reviews of generic medicines submitted & reviews looking biologic therapies	Reviews of school measures, Screening, Diagnostic test accuracy review updates	EIEP, EMS, EMD, ITS
Objective 2. Streamlining production of reviews and simplifying editorial systems and processes					
Editorial Management System	PRD, ITS - CM	June 2019 – September 2021	1st roll out of CRGs, creation of central editorial site; creation of roll out & implementation training plan	- Further roll out to remaining networks; - Review of final forms & processes; - Complete tech work around licence for publication, development ingest & XML editing. For more information go to EMS project page.	Editorial Integrity & Efficiency project (EIEP) (of having all the networks launched); EMD (for review of training material); ITS tech development for RevMan & Archie; PRD
Editorial Integrity & Efficiency pilot	EMD - TL	June 2021 to December 2022	**Workstream 1:** - Phase B CRGs Invited - Phase A reviews submitted to service - Working group convened and finalised workflows, etc. - Editorial Service staff recruited	**Workstream 1:** - Phase B groups onboarded onto service - Phase A+B reviews submitted to service - Phase C Groups invited. - Review metrics and project impact	PRD, PSD, COVID 19 response
			Workstream 2: - One-to-one consultations took place with 11 of CRGs – including those in the pilot. - Second stage of the listening exercise has been briefed and planned for the remainder of the year.	**Workstream 2:** - EiC Presentation planned for the 9th September to introduce proposed new model, including launch of microsite. - Workshops to be announced on the 9th September for deep dives into proposed new model For more information go to EIEP project page.	NIHR Response PSD
Editorial Tech Product (PET) Programme	EMD, ITS, PRD – TL, CM & CP	5-year programme of work	- Research done on Project 1 (Agree start to end journey), awaiting SMT decision for next steps. - Project 2 - Methods Groups informed Editorial Manager Review Proposal and Expression of Interest forms - Project 3 - Meeting with Cochrane/Covidence in August - good progress on new flexible data extraction templates and functionality against Cochrane requirements. Agreement for development teams to stay in regular contact and partnership/governance meetings monthly. Agreement is light investment of time from Cochrane while Covidence work to deliver our requirements. We conveyed that Cochrane is committed to flexibility and interoperability, not tight integration. - Project 6 - PICO surveillance of studies for inclusion in CRS and CENTRAL to support review production and enhance CLib - good progress on automated feed, crowd task training and rollout proceeding, and workflows being finalized. Potential to shift	- Checking current plans considering NIHR response (potentially will require us to accelerate) - Reprioritization of projects to take place.	EMD planning, EIEP

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			implementation in CLib into Q1 2022 due to EMS implementation and other CLib roadmap items taking priority. • Projects 7 & 8 - PICO implementation on track; PICO search on Cochrane library in development. • Project 15 - Business case for RevManWeb for non-Cochrane reviews signed off by SMT.		

GOAL 2: Advocating for evidence: To be a leading global advocate for evidence-informed health and care

Objective 3. Advocating for evidence-informed decision making and integrity in research, including by pursuing high-impact partnerships and activities					
Strategic partnerships	SH	Ongoing	• WHO is now a partner in Cochrane Convenes • Developed and submitted the plan of work for 2022-2024 for Official Relations.	Deliver report on the work conducted with WHO in the period 2019-2021. Wikipedia: in Q2 starting to explore formalising the partnership with them (this process is continuing)	

GOAL 3: Informing health and care decisions: To inform health and care decisions by making our evidence accessible, usable, and available to all

Objective 4. Making all Cochrane Reviews Open Access by 2025 at the latest without placing the financial burden on review authors					
Open Access strategy and delivery	PRD - CP	Feb 2021 to March 2022	• Cochrane Author survey completed. Results will be available in Sept 2021. • New UKRI policy published Aug 2021, initial assessment and impact shared with SMT. • Initial assessment of OA business model options completed.	• Run OA briefing and development sessions with the Board. • OA Board session scheduled for 13 Oct 2021.	• Future CLIB CET cost base available from Review & Re-structure project so that we can assess the likely future P&L for CLIB and align future costs to OA business model scenarios. • Access to future cost base scenarios for Centralised Editorial Services and replacement CRG structure models.
Objective 5. Improving user experience by increasing the accessibility and usability of our products					
Cochrane Library Product development plan	PRD - CP	To Dec 2021	April to August • Voice of the customer survey completed re-confirming value proposition for priority audiences and guiding product strategy. • User research project underway with 40 interviews completed across key audiences to validate product dev concepts and their value proposition statements. Q2 product work includes: • Scheduled publication times for Cochrane Reviews • Improved quarterly planning process and deep dives for dev proposals. • Improvements to translations workflows using Memsource • New version history table deployed for Reviews. • Deployed Crazy Egg software to show user behaviour on our web pages and enhance user testing for existing and new features.	• Complete user research project by Oct. • Start customer research interviews. • Run user survey to assess Spanish Portal. • Understand short and medium-term requirements for Shorter Review Format project to streamline author review writing process. Q3 product work includes: • Ongoing improvements to Memsource integration. • Introduce token access payment model for institutions. • Right hand navigation user experience improvements • Ongoing PICO integration including show PICOs within Reviews. • EMS integration for CCA and Editorials. • Introduce concurrent publishing to stop CENTRAL reload publishing issues for other content.	• Prioritisation of Editorial projects in response to NIHR CRG funding. How do we attract author teams and maintain review output for CLIB? • Closer alignment of updated editorial **and publishing strategy.**
Editorial Tech Product (ETP) Programme	See above				
Plain Language Summary pilot	KTD - JA	May 2021-May 2021	• Guidance and user-templates are currently with the Review Groups for user-testing and we hope to have final evaluation and feedback by end of September	• Guidance and the user-test results will then be sent to the Editorial Board for approval together with the Future Recommendations Document.	Editorial Board EMD PSD ITS – tech implications for PLS changes to template in Rev-Man CRGs

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Knowledge Translation mainstreaming	KTD - JA	Jan-Dec 2021	• Dissemination Checklist and Guidance Training programme will continue in Q3 and complete in Q4 as per the plan – all on course with over 100 Cochrane Group staff.	• Dissemination Checklist and Guidance Training programme will continue in Q3 and complete in Q4 as per the plan – all on course with over 100 Cochrane Group staff.	• PSD – learning team: Continued support of dissemination essentials, support to KT mentoring and development of author training materials • EMD: Support in advisory capacity for author training materials, inclusion, integration of KT into EMS and possible discussions about KT activities/product database • ITS: possible discussions about KT activities/product database • PRD: possible discussions about KT activities/product database

ENABLING OBJECTIVES:

Improved efficiency: Reducing editorial and production complexities, and simplifying organizational structures to support the global collaboration that is key to Cochrane's work

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Review & Reorganisation (CET)	JB	April 2021 – March 2022	• Communications to CET about the process & how CET members can be involved • Timelines for next period shared with CET	• Next stages of the process (see dropbox folder for more detailed plan)	• Time required from Heads of Department & team members

Sustainability: Realizing our Open Access ambitions by moving towards a new organizational business model that reflects expanded fundraising and delivers long-term sustainability for the whole organization

Fundraising strategy	CEOO - SH	Ongoing	• Draft fundraising report available • Established the fundraising task force. • Submitted application for IRO (independent Research Organisation) – status would open funding opportunities in the UK.	• Working with fundraising task force on theory of change for the organisation – should be available end of Q3.	

Increased awareness and impact: Increasing the visibility and profile of Cochrane globally; and demonstrating our value and impact to decision-makers and funders

External communications	KTD - JA	Ongoing	• Media and dissemination support to COVID reviews- packaging and push • Confirmation of all Multi-lingual agreements and funding for 21 excluding Spanish	• Media and dissemination support to COVID reviews- packaging and push • KT Multilingual - quarterly reviews with Chinese, French and Spanish teams will take place in Q3 and 4 with discussions on future funding requirements and new language agreements in place for 2022 to be confirmed by Q4 subject to SMT discussion and approval. • Preparation, organisation, and content planning for Cochrane Convenes: Advocacy and thought leadership initiatives to begin. • Departmental support required (Subject Matter Experts) for Dissemination Essentials Training programme beginning in May – October 2021.	GSU PSD
Monitoring & Evaluation framework	GSU - LB	Oct 2020 – to be decided	• Prepared and conducting 2021 Cochrane Group reporting to gather 2020 data on resources and key activities/impact to support strategic priorities. Launched end of July with a deadline 15 October. • Working with Board members to develop management metrics for Strategy for Change, align with theory of change developed as part of fundraising work. • Provided EMD with CRG data • Prepared SMT report	• 2021 Group Funding Report • Board management metrics	Finance Services EMD

Enhanced accountability: Strengthening communications and engagement with Cochrane members, supporters, and staff; improving diversity and inclusion; and making a commitment through the evidence we produce and how we collaborate to addressing global health and care priorities and reducing health inequities

Internal communications	KTD - JA	Ongoing	• Internal communications support to Groups/SLACK and changeover of newsletters onto SugarMarket • Events: Successful delivery of Governance Meetings via Hopin platform and coordination of Cochrane Group meetings in May.		

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Diversity & Inclusion initiative	PSD - CC	December 2020 – to be decided	• Diversity and Inclusion Advisory group formed. Group is made up of a range of community volunteers & will be important in informing the work. • We contracted a consultant to help us deliver the listening and learning exercise. They will run the surveys and focus groups and undertake the analysis work.	• The advisory group will meet to work on ideas for the listening exercise and to inform the first draft of questions. • The Programme Board will meet to confirm the overall approach and best use of resources on the project. The main listening and learning exercise will run during Q4 with a plan to report back by January at the latest.	

Cochrane endeavours to be as open and transparent as possible in its business and so the majority of documents are made available open access. However, where information is confidential or commercially sensitive, it will be restricted. Documents that were restricted before a meeting may subsequently be made available open access following a Senior Management Team meeting if the restriction is time-sensitive only.

For more information on each departments 2021 plans, please click on the links below:

Chief Executive Officer's Office (CEOO): https://community.cochrane.org/organizational-info/people/central-executive-team/chief-executive-officers-office/ceo-office-2021-activities

Editorial and Methods Department (EMD): https://community.cochrane.org/editorial-and-methods-department-2021-activities

Finance Services (FSD): https://community.cochrane.org/finance-services-department-2021-activities

Informatics & Technology Services (ITS): https://community.cochrane.org/informatics-and-technology-services-department-2021-activities

Knowledge Translation Department (KTD): https://community.cochrane.org/knowledge-translation-department-2021-activities

Publishing, Research and Development (PRD): https://community.cochrane.org/publishing-research-development-department-2021-activities

People Services Department (PSD): https://community.cochrane.org/people-services-department-2021-activities

SMT/Project Sponsors

CE – Casey Early; CC – Chris Champion; CM – Chris Mavergames; CP – Charlotte Pestridge; JA – Jo Anthony; KSW - Karla Soares-Weiser; LB – Lucie Binder; SH - Sylvia De Haan; TL - Toby Lasserson

Acronyms

BAU – Business As Usual

CDSR - Cochrane Database of Systematic Reviews

CRG - Cochrane Review Groups

DTA - Diagnostic Test Accuracy

EIEP - Editorial Independence & Efficiency pilot

EM - Editorial Manager

EMS - Editorial Management System

ETP - Editorial Tech Product

FAI - Finance, Audit and Investment

GDPR - General Data Protection Regulation

GSU – Governance & Strategy Unit

HSE - Health Systems Evidence

HW – HighWire

IRO - Independent Research Organisation

MAs - Management Accounts

M&E framework – Monitoring & Evaluation Framework

NHMRC - National Health and Medical Research Council

NIHR - National Institute for Health Research

OA – Open Access

P&L – Profit & Loss

PLS - Plain Language Summary

Q1 – Quarter 1 (January to March)

Q2 – Quarter 2 (April to June)

S&E review – Sustainability & Efficiency review

SMT - Senior Management Team

SSE - Social Systems Evidence

VoC - Voice of customer