

Welcome to the 2020 Financial & Resource Monitoring of Cochrane Groups

All Cochrane Groups (Centres, Associate Centres, Affiliates, Fields, Review Groups (CRGs), CRG Satellites, and Methods Groups) should complete this Financial & Resource Monitoring form by the deadline of 31 January 2021. Once you have all the information you need to hand, it will take around 30 minutes to complete and requires you to have an internet connection throughout.

Purpose of the form:

The information you provide in this form supports an organization-wide data-gathering exercise that gives a picture of Cochrane's overall 'financial health'. It is not an audit of your accounts and the information will therefore not be exactly the same as that which you provide to your host organization or funders.

- It enables the Governing Board, Central Executive Team and Cochrane Groups to provide information to the public about who funds Cochrane, and the collective monetary cost of the organization's work
- It identifies whether Groups are operating sustainably, highlighting any actual or potential resource issues
- This year, Groups are also being asked to indicate whether the COVID-19 pandemic is having, or may have in the future, implications for financial sustainability

Who should complete the form:

This form should be completed by a member of your Group or delegated to someone in the finance department of your host organization. **Before you submit the form, it must be approved by the person in charge of your Group**(e.g. Coordinating Editor or Centre Director). Review Group Satellites, and Geographic Group Associates and Affiliates, should share completed forms with the Review Group or Geographic Group with which they're associated.

Only one form per Group should be submitted!

- **Information you will need to complete the form:** Access to your Group's financial and staff records for its last complete financial year
- **Information to support you:** A copy of last year's completed form will be emailed to the person who approved it. A copy of this completed form will be emailed to: i) the person who submits it; ii) the person who approves it.

Period covered by the form:

We are collecting Information for your Group's most recent complete financial year: a 12-month period ending at some point in 2019 or 2020. In most countries this will be January to December 2019, or April 2019 to March 2020. You will be asked to specify your last complete financial year in the form.

Only Groups registered before 1 January 2020 should complete the form this year; Groups registered in 2020 will be asked to complete the form from next year.

Navigating the form:

You can go back and forth between pages. If there is a page you cannot complete you can return to it later, but you must make sure you do so: i) on the same computer; ii) with 'cookies' enabled on your web browser.

There is no print option on this form, so if you want to print your answers as you go, please use a 'print page' option on your browser. You will not be able to return and make edits once you have submitted the form.

When entering figures, please only add clean numbers without any text or currency signs (+ or - symbols are allowed).

Confidentiality:

All information provided in this form will be subject to [Cochrane's Privacy Policy](#).

Personal information: The name and contact details of the person completing the form are requested to enable the Central Executive Team to query the information provided. These details will not be shared.

Cochrane Group information: Information about Groups will be published in aggregate on Cochrane's websites and print publications. Information about individual Groups will not be available to the public but will be shared with Cochrane's Senior Management Team and Governing Board. Review Group Satellites, and Geographic Group Associates and Affiliates, should share completed forms with the Review Group or Geographic Group with which they're associated.

Questions and comments can be sent to monitoring@cochrane.org.

About your Group

*** 1. Which Cochrane Group are you reporting on?**

Other (please specify)

*** 2. What kind of Cochrane Group is this?**

Other (please specify)

*** 3. In which country is your Group located?**

About your Group's income and resources

* 4. What was your Group's last complete financial year?

This is the year that you will report on in the questions below. It's the time period used by your Group and/or its host organization for accounting

Other (please specify)

* 5. What currency does your Group use for its accounts?

This is the currency of your Group's accounts. The Central Executive Team will convert the totals you provide in your local currency into British pounds (GBP), which is the currency of Cochrane's central accounts. An exchange rate correct at the time of conversion will be used. This will enable comparisons between Groups, Group-types and countries.

Please use the currency you select below for all your answers in this survey (i.e. you do not need to convert to British pounds in your answers).

Other (please specify)

* 6. Did your Group receive direct income in its last financial year?

Direct income is funding and other income that has been received or generated by your Group and can be spent. This does not include in-kind support. In-kind support refers to goods or services that have been provided to your Group in a way other than cash, usually by your host organization; for example: staff-time, use of offices, etc.

☐ Yes

☐ No

7. Where did this direct income come from?

If you answered 'yes' to Question 7, please list all your Group's funding sources, including income generated by the Group for work or services it delivered (e.g. delivering training courses).

If you answered 'no' to Question 7 you can skip straight to Question 12.

If your Group:

- received multiple grants from a single funding scheme, combine these into one.
- had fewer than 10 funding sources, leave the remaining boxes blank.
- received funding in one amount for more than one year, only include what you were allowed or planned to use in the last financial year. For example, if you received \$100,000 for 2019 and 2020 and planned to split it evenly across the two years, enter 50,000.

Name of funding source 1:

Type of funding (e.g. project funding, infrastructure funding, services delivered)

Amount provided in the year you're reporting on (in currency of Group's accounts to nearest whole number)

Name of funding source 2:

Type of funding (e.g. project funding, infrastructure funding, services delivered)

Amount provided in the year you're reporting on (in currency of Group's accounts to nearest whole number)

Name of funding source 3:

Type of funding (e.g. project funding, infrastructure funding, services delivered)

Amount provided in the year you're reporting on (in currency of Group's accounts to nearest whole number)

Name of funding source 4:

Type of funding (e.g.
project funding,
infrastructure funding,
services delivered)

Amount provided in the
year you're reporting on
(in currency of Group's
accounts to nearest
whole number)

**Name of funding
source 5:**

Type of funding (e.g.
project funding,
infrastructure funding,
services delivered)

Amount provided in the
year you're reporting on
(in currency of Group's
accounts to nearest
whole number)

**Name of funding
source 6:**

Type of funding (e.g.
project funding,
infrastructure funding,
services delivered)

Amount provided in the
year you're reporting on
(in currency of Group's
accounts to nearest
whole number)

**Name of funding
source 7:**

Type of funding (e.g.
project funding,
infrastructure funding,
services delivered)

Amount provided in the
year you're reporting on
(in currency of Group's
accounts to nearest
whole number)

**Name of funding
source 8:**

Type of funding (e.g.
project funding,
infrastructure funding,
services delivered)

Amount provided in the
year you're reporting on
(in currency of Group's
accounts to nearest
whole number)

**Name of funding
source 9:**

Type of funding (e.g.
project funding,
infrastructure funding,
services delivered)

Amount provided in the
year you're reporting on
(in currency of Group's
accounts to nearest
whole number)

**Name of funding
source 10:**

Type of funding (e.g.
project funding,
infrastructure funding,
services delivered)

Amount provided in the
year you're reporting on
(in currency of Group's
accounts to nearest
whole number)

**TOTAL OF ANY
OTHER FUNDING
NOT LISTED ABOVE:**

8. What was your Group's total direct income?

The total of all funding sources (add the totals from Question 7 together):

***In the year you're reporting on**

***In the currency of your Group's accounts**

***To the nearest whole number**

9. What services did your Group deliver for income?

If you listed in Question 7 income for services your Group delivered, please specify what type of services these were.

Tick all that apply.

- ☐ Delivering training or other workshops
- ☐ Hosting conferences or other events
- ☐ Undertaking commissioned Cochrane Reviews
- ☐ Undertaking other commissioned work
- ☐ Translating Cochrane content

Other (please specify)

10. 5. What was the estimated Full Time Equivalent (FTE) of the people working for your Group?

*In the year you're reporting on

The aim of this question is to get a picture of the 'core number' of people working for Cochrane Groups on a paid or voluntary/non-paid basis. You shouldn't include people who contribute to your Group on a one-off or irregular basis; for example, as an author of a Cochrane Review.

Full-time equivalent (FTE) (also known as whole time equivalent) is a unit that indicates the workload of an employed person in a way that makes workloads comparable regardless of how many hours are actually worked. Someone who works full-time works 1.0 (i.e. 100%). Someone who works half of that works 0.5 (i.e. 50%). Usually, 50% is 2.5 days/week (i.e. half of a five-day working week). So, you will need to add up the FTE of all the people working for your Group (e.g. $1.0 + 1.0 + 0.5 + 0.75 = 3.25$).

11. Can you give, or estimate, the in-kind or indirect financial contribution made by your host organization to support your Group?

***In the year you're reporting on**

***In the currency of your Group's accounts**

***To the nearest whole number**

These are the financial resources that are not available by your Group to spend, but are nevertheless essential to keeping it running. Your host organization is likely to have a standard way of calculating the amount. Leave blank if you are unsure.

Value of in-kind staff
contribution (salaries of
staff working for but not
paid for by the Group's
income)

Value of in-kind non-
staff contribution (e.g.
office space)

About your Group's expenditure

* 12. What was your Group's total expenditure?

*In the year you're reporting on

*In the currency of your Group's accounts

*To the nearest whole number

13. How was this broken down?

*In the year you're reporting on

*In the currency of your Group's accounts

*To the nearest whole number

Staff
salaries (full
and part-
time
employed
staff)

Project and
short-term
contract
staff
salaries (full
and part-
time short-
term
contract
staff)

Consultant
or
honorary
fees (e.g.
for an
editor's
time)

Travel and
subsistence
to the
Cochrane
Colloquium

Travel and
subsistence
to other
events
hosted by
Cochrane

Travel and
subsistence
to other
non-
Cochrane
events

Equipment

Host
organizatio
n's
overhead
fee

Other

Estimating future funding

*** 14. What has happened, or is estimated to happen, to your Group's income in 2020?**

- ☐ Increased
- ☐ Stayed broadly the same
- ☐ Decreased
- ☐ Don't know

If it has increased or decreased, by how much?

*** 15. What is estimated to happen to your Group's income from 2021 onwards?**

- ☐ Increase
- ☐ Stay broadly the same
- ☐ Decrease
- ☐ Don't know

If it will increase or decrease, by how much (if you know or can estimate)?

*** 16. Have you received any official notification about a change in funding and/or support to your Group from your host organization or funders?**

- ☐ Yes
- ☐ No

Comments

17. If you answered 'Yes' to Question 16, has this change been explained as due to the COVID-19 pandemic?

☐ Yes

☐ No

Comments

Measurement & Evaluation of organizational strategic objectives

We are starting to develop strategic monitoring & evaluation in 2021 to assess on a regular basis to what extent the organization is achieving its new strategy, making a difference to healthcare, meeting the needs of our end users and funders, and informing how we can improve what we do. Your answers to the following questions will inform the plans.

*** 18. What types of information does your Group have to report on to its funder(s)? What is most important to them?**

*** 19. What types of information are, or would be, most useful for you to have in order to understand the impact your Group's work has, what difference its work makes to healthcare, and how it can improve?**

Thank you

* 20. Your personal contact information

We are collecting this information for the purpose of being able to contact you in case of queries about this form and to send you a PDF of the completed form after you submit it.

First name, Last Name

Your role in the
Cochrane Group

Email Address

* 21. Confirm this form has been approved by a person in charge of your Group. This is the primary manager and decision-maker; for example, the Centre Director or Co-ordinating Editor.*

This is a required question.

Name of Approver

Position in Group

Thank you for completing the 2020 Financial & Resource Monitoring of Cochrane Groups.

If you have cookies* enabled on your browser you can return to this form on the same computer to make edits before you submit it; it will remember your IP address and save your answers.

Press 'Submit' if the survey is complete and no further edits are needed.

Only one form per Group should be submitted!

The Central Executive Team will provide you with a PDF of your completed answers by email. Please contact **monitoring@cochrane.org** if you have any questions or need to make changes after submitting your form.

*Cookies are small text files stored in your browser that websites use to recognize repeat visitors. Most browsers store cookies by default, so they're already enabled for you.