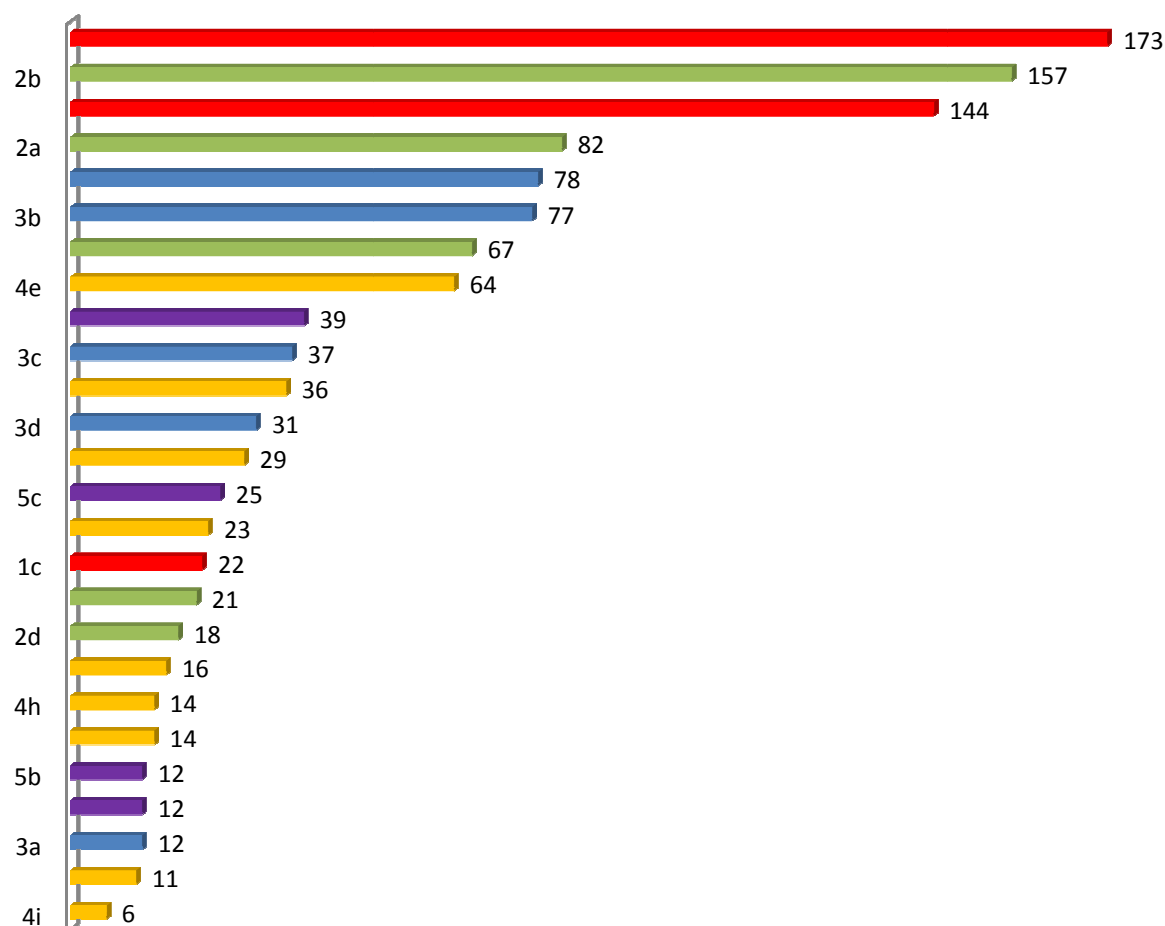


## IMPLEMENTING THE RECOMMENDATIONS OF THE STRATEGIC REVIEW: PROGRESS REPORT, SINGAPORE COLLOQUIUM 2009

The Strategic Review's 26 recommendations, in thematic order, according to the Recommendations Report, published 16<sup>th</sup> February 2009:

Numbering	Recommendation	Lettering
	<b>Clarity of purpose</b>	<b>1</b>
1	Reaffirm our primary purpose to be the production of <u>high quality</u> systematic reviews	1a
2	Formalise additional purposes including training, methods development and advocacy for evidence-based decision-making and identify responsibilities of entities for these purposes	1b
3	Identify principles for developing new products or lines of activity	1c
	<b>Engagement of partners for mutual benefits</b>	<b>2</b>
4	Develop a Marketing and Communications Strategy to promote external and internal awareness of the value arguments for and achievements of The Cochrane Collaboration	2a
5	Improve the usability of <i>The Cochrane Library</i> and other products for diverse stakeholders	2b
6	Develop a partnership strategy to engage other systematic review producers and knowledge packagers	2c
7	Establish formal membership for the Collaboration's contributors	2d
8	Establish an External Advisory Board	2e
	<b>New resource options for supporting strategic objectives</b>	<b>3</b>
9	Invest in a development function for new products or lines of activities	3a
10	Investigate the development of a broad-based educational program ('Cochrane Education')	3b
11	Investigate the development of a responsive review program ('Cochrane Response')	3c
12	Acknowledge the reality of our current infrastructure funding model and work to maintain it	3d
13	Explore and pursue new funding opportunities	3e
	<b>Management, accountability and effective leadership</b>	<b>4</b>
14	Clarify the roles and responsibilities of its scientific/professional, managerial and editorial leadership	4a
15	Develop and implement a formal succession planning mechanism for entity leadership	4b
16	Develop and implement performance appraisal mechanisms for entity leaders	4c
17	Enhance accountability mechanisms of entities to ensure core functions are met and Collaboration policies are implemented	4d
18	Develop and implement policy for minimum competencies for review author teams	4e
19	Develop and implement central decision-making processes that clearly identify communication, implementation and monitoring plans	4f
20	Review the membership of the Cochrane Collaboration Steering Group (CCSG) and its alignment with the purposes of the Collaboration	4g
21	Define required competencies for CCSG membership and induction and ongoing training for CCSG members	4h
22	Review terms of reference and membership of CCSG Sub-Groups and Advisory Groups	4i
	<b>Strategic thinking, embedded at all levels, at all times</b>	<b>5</b>
23	Undertake a formal environmental scan every two to three years	5a
24	Use uncommitted income strategically to develop new products/lines of activity	5b
25	Review terms of reference, and number and geographic spread of Cochrane entities to ensure efficient alignment with the purposes of the Collaboration	5c
26	Develop an ongoing and participatory approach to strategy formation	5d

Before the Steering Group's mid-year meeting in April 2009, 305 respondents to a Collaboration-wide survey prioritised the recommendations according to their urgency to implement:



Please pick the FOUR (4) recommendations, IN ORDER OF PRIORITY, which you feel are most important for the Collaboration to implement in the first instance. These are likely to be the recommendations you feel are most likely to drive change – or reinforce existing practices - and will create the framework within which the other recommendations can be developed, implemented, or even disregarded if this is appropriate.

### The 'Top Five'

Identifier	Recommendation
1a	Reaffirm our primary purpose to be the production of high quality systematic reviews
2b	Improve the usability of <i>The Cochrane Library</i> and other products for diverse stakeholders
1b	Formalise additional purposes including training, methods development and advocacy for evidence-based decision-making and identify responsibilities of entities for these purposes
2a	Develop a Marketing and Communications Strategy to promote external and internal awareness of the value arguments for and achievements of The Cochrane Collaboration
3e	Explore and pursue new funding opportunities

At its 2009 mid-year meeting, which followed a full day discussion of the Strategic Review's recommendations involving members of the Steering Group, Centre and Branch Directors, and Coordinating Editors, the Steering Group:

- Accepted all the Strategic Review's recommendations
- Agreed to set-up working groups for each of the recommendations to discuss ways of developing and implementing them, to which at least one member of the Steering Group would be assigned

Since this meeting, some 'recommendation working groups' have been established, have begun work and have produced papers for the Steering Group's discussion at this meeting. Other recommendations have fallen under the responsibility of existing working groups or other groups in the Collaboration. As certain recommendations are closely related, some have been clustered under the remit of one working group. Some working groups are yet to have begun work and require further discussion before they do so.

**These working groups have been established, have defined their scope and terms of reference, and have produced papers for consideration by the Steering Group at this meeting:**

MARKETING AND COMMUNICATIONS WORKING GROUP	
Identifier	2a (4)
Recommendation(s)	Develop a Marketing and Communications Strategy to promote external and internal awareness of the value arguments for and achievements of The Cochrane Collaboration
Lead(s)	<a href="#">Mary Ellen Schaafsma</a>
CCSG Lead	
CCSG Members	Lorne Becker, Lisa Bero, Donna Gillies, Liz Whamond, Nick Royle
Team Members	Mike Clarke, Lucie Jones, Chris Mavergames, Lori Tarbett
Reported progress	Scoping document submitted to CCSG

CCSG ISSUES WORKING GROUP	
Identifier	4g (20), 4h (21), 4i (22)
Recommendation(s)	Review the membership of the Cochrane Collaboration Steering Group (CCSG) and its alignment with the purposes of the Collaboration
	Define required competencies for CCSG membership and induction and ongoing training for CCSG members
	Review terms of reference and membership of CCSG Sub-Groups and Advisory Groups
Lead(s)	<a href="#">Nick Royle</a> and <a href="#">Sally Green</a>
CCSG Lead	
CCSG Members	Lorne Becker, Jonathan Craig, Julian Higgins, Steve McDonald
Team Members	Jordi Pardo Pardo
Reported progress	Progress report submitted to CCSG

The Entity Leadership working group for Centres has finalised its membership and will have held two teleconferences by the Singapore Colloquium:

ENTITY LEADERSHIP WORKING GROUP (CENTRES)	
Identifier	4b (15), 4c (16), 4d (17)
Recommendation(s)	Develop and implement a formal succession planning mechanism for entity leadership
	Develop and implement performance appraisal mechanisms for entity leaders
	Enhance accountability mechanisms of entities to ensure core functions are met and Collaboration policies are implemented
Lead(s)	Alessandro Liberati
CCSG Lead	Rob Scholten
CCSG Members	Lisa Bero, Zbys Fedorowicz
Team Members	Gerd Antes, Xavier Bonfill, Jeremy Grimshaw, Jani Ruotsalainen
Reported progress	Two teleconferences conducted before the Singapore Colloquium. Scope and remit of group established

These existing working groups or Collaboration groups have taken responsibility for developing and implementing the following recommendations:

EDITORIAL UNIT	
Identifier	1c (3), 3b (10), 3c (11)
Recommendation(s)	Identify principles for developing new products or lines of activity
	Investigate the development of a broad-based educational program ('Cochrane Education')
	Investigate the development of a responsive review program ('Cochrane Response')
CCSG Lead	David Tovey
Linkages	Co Eds
Reported progress	No progress update

'CCC' (Co-Chairs, CEO, EiC)	
Identifier	3a (9), 4a (14), 4f (19)
Recommendation(s)	Invest in a development function for new products or lines of activities
	Clarify the roles and responsibilities of its scientific/professional, managerial and editorial leadership
	Develop and implement central decision-making processes that clearly identify communication, implementation and monitoring plans
Reported progress	Cash Flow forecast revised to adhere to Review recommendations, addressing recommendation 3a Implementation, Tracking and Communication' (ITC) Form, to be used by CCSG when preparing papers and to be sent under separate cover, addressing recommendation 4f

WEB STRATEGY TEAM	
Identifier	2b (5)
Recommendation(s)	Improve the usability of <i>The Cochrane Library</i> and other products for diverse stakeholders
CCSG Lead	<a href="#">David Tovey</a>
CCSG Members	Lorne Becker, Ruth Foxlee, Hans van der Wouden
Reported progress	First Web Strategy Summit held in June 2009, second to be held at Singapore Colloquium

TRAINING WORKING GROUP	
Identifier	1b (2)
Recommendation(s)	Formalise additional purposes including training, methods development and advocacy for evidence-based decision-making and identify responsibilities of entities for these purposes: <b>TRAINING</b>
CCSG Lead	<a href="#">Steve McDonald</a>
Reported progress	Recommendation added to TWG's agenda. To be discussed at forthcoming meeting in Singapore

METHODS EXECUTIVE/BOARD	
Identifier	1b (2)
Recommendation(s)	Formalise additional purposes including training, methods development and advocacy for evidence-based decision-making and identify responsibilities of entities for these purposes: <b>METHODS DEVELOPMENT</b>
CCSG Lead	<a href="#">Julian Higgins</a>
Reported progress	Recommendation added to agenda of newly formed Methods Exec/Board. Probable that a smaller working group will take responsibility for developing the recommendation

These recommendations require some discussion by the Steering Group as no progress has been reported:

FUNDING WORKING GROUP	
Identifier	3d( 12), 3e (13)
Recommendation(s)	Acknowledge the reality of our current infrastructure funding model and work to maintain it Explore and pursue new funding opportunities
Lead(s)	<a href="#">Lorne Becker and Nick Royle</a>
CCSG Members	
Team Members	Gerd Antes, Mike Clarke, Kay Dickersin, Paul Garner, Sally Green, Jeremy Grimshaw, Alessandro Liberarti, Prathap Thayran
Progress reported	Working group has not yet met. A question at the AGM and Booth will ask the Collaboration to consider who we could approach for funding
Issues raised	No issues reported. Work should begin with this group following the Colloquium

FORMALISATION OF ADDITIONAL PURPOSES (EBDM WORKING GROUP)	
Identifier	1b (2)
Recommendation(s)	Formalise additional purposes including training, methods development and advocacy for evidence-based decision-making and identify responsibilities of entities for these purposes: EBDM
Lead(s)	<a href="#">Lisa Bero</a>
CCSG Members	
Team Members	Mike Clarke, Sally Green, Jeremy Grimshaw, Alessandro Liberarti, Majuka Makela
Progress reported	Working group has not yet met
Issues raised	<b>MEMBERSHIP:</b> Working group only includes Centre Directors, should other groups be represented?

PARTNERSHIP STRATEGY (WORKING GROUP)	
Identifier	2c (6)
Recommendation(s)	Develop a partnership strategy to engage other systematic review producers and knowledge packagers
Lead(s)	<a href="#">Lisa Bero</a>
CCSG Members	Lorne Becker
Team Members	John Lavis, Ida Sim
Progress reported	Working group has not yet met
Issues raised	<b>MEMBERSHIP:</b> Should others be invited to join the group?

EXTERNAL ADVISORY BOARD (WORKING GROUP)	
Identifier	2e (8)
Recommendation(s)	Establish an External Advisory Board
Lead(s)	<a href="#">Lisa Bero</a>
CCSG Members	Jonathan Craig, Nick Royle, Liz Whamond
Progress reported	Working group has not yet met
Issues raised:	<b>MEMBERSHIP:</b> Should others be invited to join the group? <b>PRIORITISATION:</b> Implementation of recommendation may be put on hold while other recommendations are addressed

FORMAL MEMBERSHIP (WORKING GROUP)	
Identifier	2d (7)
Recommendation(s)	Establish formal membership for the Collaboration's contributors
Lead(s)	<a href="#">Donna Gillies</a>
CCSG Members	Zbys Fedorowicz, Hans van der Wouden, Mary Ellen Schaafsma
Team Members	
Progress reported	Working group has not yet met
Issues raised:	<b>NEED FOR IMPLEMENTATION?:</b> Donna reports: Although the Strategic Review had recommended the establishment of formal membership, the reasons identified by respondents as a reason for formal membership have been previously identified in responses to the Author Survey and are also now being raised in the discussion around representation of people from non-English speaking countries. Therefore, as these issues are consistently being raised by members of The Cochrane Collaboration, they should be addressed. However, a discussion needs to be held with the Steering Group in order to determine whether formal membership is a strategy they wish to pursue, or whether the possible benefits that were identified should be followed up in other ways

MINIMUM COMPETENCIES FOR REVIEW AUTHOR TEAMS (WORKING GROUP)	
Identifier	4e (18)
Recommendation(s)	Develop and implement policy for minimum competencies for review author teams
Lead(s)	<a href="#">Sonja Henderson</a>
CCSG Members	Roger Soll
Team Members	
Progress reported	Working group has not yet met
Issues raised:	<b>MEMBERSHIP:</b> Not finalised, although MEs should be included

ENTITY LEADERSHIP (WORKING GROUPS): CRGs, FIELDS AND NETWORKS, METHODS GROUPS	
Identifier	4b (15), 4c (16), 4d (17)
Recommendation(s)	Develop and implement a formal succession planning mechanism for entity leadership Develop and implement performance appraisal mechanisms for entity leaders Enhance accountability mechanisms of entities to ensure core functions are met and Collaboration policies are implemented
Lead(s)	<b>CRGs:</b> <a href="#">Roger Soll</a> <b>Fields and Networks:</b> <a href="#">Katrina Williams</a> <b>Methods Groups:</b> <a href="#">Julian Higgins</a>
CCSG Members	Janet Wale, Sophie Hill (CRGs)
Team Members	<b>CRGs:</b> Rachel Churchill <b>Fields and Networks:</b> Jos Verbeek, Jason Wasiak <b>Methods Groups:</b> Ian Shemilt
Progress reported	No progress reported
Issues raised	<b>MECHANISMS FOR IMPLEMENTATION:</b> Although a working group has been established to develop the recommendations for Centres, are working groups the best mechanism for the other entity types? How else can the recommendations be developed?

ENTITY TERMS OF REFERENCE (WORKING GROUPS)	
Identifier	5c (25)
Recommendation(s)	Review terms of reference, and number and geographic spread of Cochrane entities to ensure efficient alignment with the purposes of the Collaboration
Lead(s)	<b>Centres:</b> <a href="#">Zbys Fedorowicz</a> , <a href="#">Steve McDonald</a> or <a href="#">Rob Scholten</a> ? <b>CRGs:</b> <a href="#">Hans van der Wouden</a> <b>Fields and Networks:</b> <a href="#">Katrina Williams</a> <b>Methods Groups:</b> <a href="#">Julian Higgins</a>
CCSG Members	<b>Centres:</b> leader of group not yet identified
Team Members	<b>Centres:</b> Xavier Bonfill, Youping Li, Prathap Tharyan <b>CRGs:</b> Denise Thompson
Progress reported	No progress reported
Issues raised	<b>MECHANISMS FOR IMPLEMENTATION:</b> Should separate working groups be established for each entity type? Are working groups the best mechanism for developing the recommendation? <b>MEMBERSHIP:</b> If working groups established, membership needs to be finalised

**These recommendations do not require the establishment of a working group:**

**1a (1) Reaffirm our primary purpose to be the production of high quality systematic reviews**

- Primary purpose of the Collaboration reaffirmed at the Steering Group's mid-year meeting in April 2009. Publicised to the Collaboration in the Steering Group Bulletin and at this year's Colloquium (Booth, AGM, plenary sessions etc). Should be kept in mind when developing and implementing all other recommendations.

**5a (23) Undertake a formal environmental scan every two to three years**

- To be implemented as appropriate. See Annex A, below, courtesy of Ashridge Consulting. The Strategic Review was carried out using the theoretical framework of 'emergent organisations' and the definition of strategy as the pattern that emerges from the flow of decision-making in an organisation (Mintzberg and Moncrieff).

**5b (24) Use uncommitted income strategically to develop new products/lines of activity**

- The Steering Group will attempt to implement this recommendation during consideration of all its expenditure. It will form the background to the discussion on the future strategic direction of the Opportunities Fund at this meeting.

**5d (26) Develop an ongoing and participatory approach to strategy formation**

- The establishment of the recommendation working groups (above), representing the broad interests of the Collaboration, is one of the mechanisms by which this recommendation is being implemented. The 'Collaboration' Booth and AGM presentation, designed to continue the 'conversation' with the Collaboration's members started by the Strategic Review, are intended to become annual. Development of the Strategic Review wiki (<http://ccreview.wikispaces.com/>) will occur as work on implementing the Review's recommendations progresses, with the aim of migrating the content during cochrane.org's redesign, as appropriate.

**Some points for the Steering Group to consider at this meeting:**

- Which recommendations should be prioritised for implementation in the first instance?
- What are the timelines for implementation?
- What should the working groups achieve? What is their remit and what are their desired deliverables (implementation, or plans for implementation by others)?
- What are the potential barriers to implementation?



