

Governing Board Paper

Agenda number:	17.3 [2018-LISB-17.3]
Agenda item:	Methods Structure and Function Review: Organising Methods Expertise in Cochrane
Submitted for Governing Board meeting:	Governance Meeting Lisbon, March 2018
Submitted by:	Jackie Chandler (Methods co-ordinator) on behalf of the Methods Executive and Methods Group convenors.
Sponsored by:	David Tovey, Editor in Chief
Access:	Open
Decision or information:	Information
Resolution for the minutes:	The Board receives and notes the plans for “Organising methods expertise in Cochrane”.
Executive summary:	Cochrane’s reputation is built on the quality of its methods and this itself is dependent on a vibrant and engaged methods community. This remains essential as expansion and development of research evidence synthesis methods continues at a pace. This expansion, and the need to incorporate increasingly complex methods, is a major challenge to our organisation. Our unique community of research synthesis methodologists is an essential element of our response, hence the need to strengthen its structure and processes. The flexible structures proposed foster engagement with a clear minimum set of expectations re-focused towards Cochrane community needs. This document provides a set of solutions aimed at helping Cochrane to achieve its strategic aims, and to support the development of the methods community.
Consultation with Cochrane Council:	No
Financial request:	None

1 Background:

An important element of *Strategy to 2020* was a requirement across all Cochrane Groups to review their structure and function to meet several challenges. These include slow production of reviews and delayed implementation of new, and updated methods and response to stakeholder requests for greater review diversity relevant to their needs. Goal 1 of *Strategy to 2020* also commits Cochrane to “pioneer innovative methods”. To meet these challenges Cochrane needs to increase and sustain the engagement of methodologists.

Methods Groups cover data type (NRS, Qualitative research), review question (diagnosis, prognosis), analysis technique (network meta-analysis), special issues (equity, priority setting), etc. Groups interconnect and work together on joint initiatives (e.g., GRADE & DTA, GRADE & Qualitative research,

Bias & Nonrandomised studies). Methods Groups support implementation and development of methods into Cochrane Reviews, through training, guidance development (especially the Handbook), expert advice and peer support. The proposal aims to create better working relationships between methods and principally, but not exclusively, CRG Networks to support the prime objective: *“to promote evidence-informed health decision-making by producing high-quality, relevant, accessible systematic reviews”*.

2 Proposal:

Five proposals align with structural changes elsewhere to support the delivery of Cochrane’s *Strategy to 2020*. They deliver greater functionality, and a platform for a wider range of individual researchers to engage more flexibly in Cochrane. Whilst we maintain the fundamental structure of the Methods Group and supporting infra-structure, we will conduct periodic reviews under the terms of a new Collaboration Agreement. The Methods infra-structure also needs to work more effectively with other parts of Cochrane.

The proposals aim for flexibility, better working relationships and co-operation with other parts of the community, specifically review production.

Proposals 1 and 2: Develop a flexible approach to engagement of methodologists in Cochrane.

1. *Methods Research Network (MRN)*: Informal research task groups already exist in Cochrane through different projects, both funded and unfunded. Examples include work groups formed for the MECIR standards, various Methods Innovation Fund projects and, more recently, a Scientific Committee sub-committee to review a specific methodological problem. We also have the Living Systematic Review network, which has implications for methods. Methods Research Networks are suitable for cross cutting topics, such as complex interventions. Researchers would gather around a specific issue, problem or task. MRNs either address well-defined methodological questions, topics or related tasks, or explore a narrowly defined topic. MRNs can engage those with relevant skills who are not necessarily attached to a Methods Group or Cochrane. They can form efficiently to address an identified issue, and can disband once their work has been completed – in contrast to the cumbersome process in place currently for initiating Cochrane Groups.
2. *Register of methodologists*: The Cochrane Membership scheme is a key organisational change to the way Cochrane functions. It seeks to make involvement easier, as well as keep account of, and manage more effectively, contributions made by individuals. One of this scheme’s central planks is setting criteria for contributions. Use of the system will identify individuals with specific skills in the database from which the register can emerge, as well as recruitment beyond the membership system. Access to a register of individual methodologists allows contributions to Cochrane not constrained by membership of a Committee, Group or Network.

Proposal 3: Review and update the Methods Group structure

All Cochrane Groups will undergo regular review to ensure they meet individually agreed objectives as set out in a Cochrane Collaboration Agreement. This agreement sets out Cochrane’s expectations of the Group and the Group’s expectations of Cochrane. We will review each Group’s capacity to meet minimum expectations to maintain Methods Group status. From this benchmark we will revisit each Group agreement every 5 years to review past progress and performance, consider future development, and negotiate as required. We intend to get this initial review underway this year. It will provide an opportunity for each Group to re-evaluate its methods remit, membership and convenorship, as well as assess their current performance against these minimum expectations. The review will consider Group viability and may lead to Groups merging, re-organising internally, de-registering (becoming a Methods

Research Network) or furthering the partnership model (GRADE (GRADE Working Group), Economics, and Equity (Campbell)).

Two lead convenors (one of them a deputy) are needed to represent the Group and will be accountable to Cochrane for the Group's activities, as outlined in the Collaboration Agreement. Extra convenors may continue at the discretion of the lead convenors. For the first time we will have clear role specifications and responsibilities for convenors separately specified from the minimum expectations of Methods Groups. For example, a minimum expectation of the Group is to ensure that Cochrane is updated on methods development within that Group's scope, whether this is included within the convenor's individual research agenda or not. A lead convenor's role is to provide leadership to the Group. This Group by Group review may lead to consolidation in some areas where there are overlapping interests allowing opportunities to re-think Group organisation.

Proposal 4 Methods will work closely with the new CRG Networks to develop more formal 'communities of practice'

The development of the CRG Networks provides a simpler structure to enable closer collaboration between the methods community and CRGs, which will support a more focussed, outcomes-based approach to engagement aimed at introducing change effectively and efficiently. Communities of practice can simply mean groups of individuals working co-operatively towards a common goal or shared endeavour. Creating these communities will need a proactive approach. The new Methods Executive model will negotiate with the Network leads:

- Expectations from both the CRG Network leads and lead MG convenors.
- Tailoring the expertise required to each CRG Network supporting the Senior Editor.
- Assessment of the CRG Networks needs and level of input required. An example might involve targeted training to a specific CRG Network.
- Capacity of the Methods Group to support the Network(s).

Proposal 5: Set up a new Methods Executive model with a different constituency and remit taking a strategic role and revised set of responsibilities

Following internal re-organisation, including the CRG Transformation Programme, we need a new Methods Executive model to assist in the management of methods development and implementation, which will

- filter methods for implementation and escalate, when appropriate, to the Scientific Committee,
- assist and advise the Editorial Board on methods implementation,
- provide support on the implementation of new and complex methods.

The new Methods Executive provides co-ordination between the Scientific Committee, Editorial Board, Handbook Editors and Methods Groups convenors (including Council members) and other methods related activities. The constituency and remit of the Executive needs to reflect these changes and includes Scientific Committee, Handbook Editor, and Council representation, a Senior Methods Advisor, plus six elected convenors. The Methods Co-ordinator and Head of the Membership and Learning Service will be ex-officio members. Executive functions involve:

- management of internal community issues with a greater role in monitoring Lead convenorship of Groups, ongoing viability of Methods Groups, and assist with individual Methods Group issues.
- decision making in co-operation with others on methods strategy (Content strategy).
- co-operation with the Editorial Board on methods implementation not needing Scientific Committee review.
- assistance to CRG Network Senior Editors with methods implementation decisions.

Information here is drawn from a fuller document “Organising Methods expertise” – Structure and function of Cochrane’s Methods Groups and supporting infrastructure. This and other more detailed documents (currently in draft) are available in a [dropbox](#) folder.

These key components expect to result in the following measures of success.

a. Measures of success:

All measures need to start with a baseline from which success can be measured. Therefore, setting baselines, is part of the overall plan, from which we can determine whether the proposals are either directly or indirectly impacting on the following:

i. Engagement of more methodologists to contribute to Cochrane to manage increasing diverse methodological demands and challenges.

At commencing the Group by Group review we should ascertain the number (using pre-specified criteria) of active methodologists (convenors and members) and their contribution (by type). Audits at 3-year intervals will measure progress. The membership system will provide data to support such an audit.

ii. A strategic and joined up approach to decision-making on methods implementation.

The Content strategy highlights the importance of successful working relationships between the new Methods Executive, CRG networks, Scientific Committee and Editorial Board to provide a consistent and effective process for identifying, assessing, approving and implementing new methods.

iii. Successful progress of the CRG Networks to deliver more complex reviews using complex methods to meet stakeholder needs.

The Content Strategy makes clear that evidence users increasingly require evidence that addresses more complex questions. This will lead to the implementation within Cochrane of reviews that address different types of question, use different data sources and employ different methods.

iv. Improved levels of competency in review author teams for complex reviews.

Working closely with CRG Networks and their priority reviews decide how best to establish improvements in review team competency using methods expertise input.

v. Methods Groups fulfilment of minimum expectations.

Automatic 5-year interim review will assess whether Groups are meeting minimum expectations, if not, agreements to retain Methods Group status will be set and Group feasibility and continuation determined.

b. Issues and strategic implications:

i. Strategy Implications: The changes proposed will lead to improvements that ensure high quality and up to date methods, and to the delivery of *Strategy to 2020* Goal 1.

ii. Resource implications: CET staff (Methods Co-ordinator and support worker) are in place and will oversee the changes. No additional resources required at present.

iii. Risks and dependencies:

Risks

Justification for volunteer contributions to Cochrane are under increasing pressure from home academic institutions. Methods researchers operate in competitive markets for grant funds, dissemination and impact of their work. Members highly value influence and implementation of their methods, especially in Cochrane. These proposals encourage greater input by a wider base of people to expand contribution.

An invigorated Methods Community with an increase in membership and activity to support Cochrane's objectives is central to the flexible methods infra-structure proposed – you do not need to be a member of a Methods Group to become involved in methodological activity in Cochrane.

Dependencies

Most activity around implementation of methods involves many departments within the Central Executive. Planned improvements to project management and co-ordination should aid better implementation of approved methods in the future.

iv. Impact and change management:

These proposals seek to improve, and widen, methods community engagement and activity to meet both current and future challenges. Flexibility, better working relationships, stronger methods leadership and an opportunity to reconfigure or realign some Methods Groups are key outcomes of these proposals. Following rigorous consultation with the methods community, the Methods Executive and Board back these proposals. We will engage the new Methods Executive, incorporating the Senior Methods Adviser, Handbook Editors, Council members as well as elected convenors, to oversee the implementation of these changes to meet both collective and individual goals. The Methods community are highly invested in methods implementation and innovation. By improving methods implementation as well as responding to innovation in methods the methods community should respond favourably to these proposals.

v. Timelines:

Proposal	Timeframe
New Methods Executive	In place by Edinburgh 2018
Review of Methods Groups	Review conducted between April 2018- April 2019, includes establishing lead convenors.
New structures	Criteria for Methodologist membership April to September 2018 Methods Research Networks – aiming for at least one to be initiated in the next 12 months
Working with CRG Networks	Development of communications strategy and working relationships to evolve as networks become established – review progress April 2019.

- vi. **Management Responsibility:** Jackie Chandler supervised by David Tovey, and in co-operation with the appointed Senior Methods Adviser and the new Methods Executive.
- vii. **Consultation:** Members of the Methods Executive and David Tovey.

3 Recommendation(s):

The Governing Board receives and notes the plans for “Organising methods expertise in Cochrane” to update and enhance the organisation of the methods community infrastructure to improve communication, engagement and contribution of methodologists to Cochrane. Five distinctive proposals including two new structures will:

- develop a new secondary structure, the “**Methods Research Network**”, for project based methods development work that does not have the status of a Methods Group and can engage non Cochrane methodologists;
- create a **register of methodologists** to increase engagement and provide Cochrane a go to place to for individual tasks;
- maintain and **update the Methods Group structure** with tighter expectations on maintaining Group status;
- provide active approaches to promote supportive relationships between Methods Groups and the new CRG Networks that lead to co-operative “**communities of practice**” to support methods implementation;
- **re-structure the current Methods Executive** to improve co-ordination between key methodologist roles in Cochrane supporting other key bodies responsible for setting methods policy and their implementation.

More detailed documents, some in draft, are available [here](#).