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## Methods Groups in Cochrane

Robust and innovative methods are the lynchpin of Cochrane and remain the basis of its reputation as the home of high-quality systematic reviews. The future sustainability of the organisation is reliant on Cochrane's ability to attract and work closely with a diverse community of pioneering methodologists and to ensure that methods are implemented wisely and accurately in Cochrane reviews.

Methodologists are essential to Cochrane as authors, peer reviewers, editors and advisers through defined roles such as Statisticians and Information Specialists with Cochrane Review Groups, and in existing methods structures such as Methods Groups, the Methods Executive, the Scientific Committee, and project-specific working groups. In particular, methodologists run Cochrane Methods Groups dedicated to specific methods relevant to Cochrane reviews. Methods Groups are usually led by a small group of senior and experienced methodologists with a wider membership of experienced and/or interested researchers. Altogether, the various structures and roles bring together a broad church of methodologists drawn from different disciplines and backgrounds.

This document provides key information for those interested in setting up Methods Groups and sets out a framework for those who are convening current Methods Groups. The aim of this document is to outline processes and structures to ensure the needs, perspectives and knowledge of methodologists are fairly captured, to define methods priorities and ensure best practice can be coordinated and implemented through the Cochrane Central Team.

## Key objective of Methods Groups:

*To lead methods development, define best practice, and advise on methods implementation within Cochrane*

### Essential functions of Methods Groups

1. Spearhead methods research and development and act as a bridge between Cochrane and the wider research community.
2. Define best practice and ensure Cochrane guidance for accepted methods is up to date.
3. Support the implementation of new or amended methods by acting as an advisor or through involvement in the methods implementation project itself.

### Desirable functions of Methods Groups

4. Keep Cochrane up to date with changing and evolving methods, flagging methods for consideration, informed from individual's research or from others in the field.
5. Lead or advise on the development of training and support for authors and editors during methods implementation and when a method is standard practice in Cochrane Reviews.
6. Maintain in co-operation with the *Handbook* editors an up to date edition, if relevant to Group's scope. Support the *Handbook* Editors by identifying new content and highlighting new content that constitutes new methods for Cochrane and may require review by the Scientific Committee.
7. Work with the Cochrane Central Methods Team, Methods Support Unit and CRG Networks to provide timely guidance about the application of specific methods.
8. Support the provision of peer review for reviews utilising relevant methods.
9. Serve as a discussion forum for the community on specific methods, supporting and maintaining the membership of the Methods Group to facilitate this and other activities.
10. Ensuring that the Group functions as part of Cochrane, adheres to the [policies for Cochrane Groups](#) and maintains a website to detail contact information and Group outputs.

### Alternatives to Methods Groups

Formal Methods Groups are not the only option for methodologists within Cochrane. Project-based Working Groups are also an option and it is important to consider whether a Methods Group or Working Group is more appropriate for the reasons you are forming the group and for what you are trying to achieve. Key differences are listed below:

Methods Group	Working Group
<ul style="list-style-type: none"> <li>• Continued involvement in the development of methods and best practice.</li> <li>• Longer-term and requires resources to maintain administrative functions and accountability reporting.</li> <li>• Convened by leading methodologists.</li> </ul>	<ul style="list-style-type: none"> <li>• Project-based format with specific objectives - form when there is something to address and dissolve when completed.</li> <li>• Supports collaborative projects across multiple Methods Groups.</li> <li>• Shorter-term and does not require</li> </ul>

<p>Proposals for new Methods Groups may begin as a Working Group to understand the demand and need.</p> <p><i>The current list of Methods Groups can be found <a href="#">here</a>.</i></p>	<p>resources to maintain administrative and accountability reporting.</p> <ul style="list-style-type: none"> <li>• Led by methodologists and/or members of the Cochrane community, including Cochrane Central staff</li> </ul> <p><i>Examples include Living Evidence Network, Clinical Study Report Working Group, collaborations to complete Cochrane Handbook chapters.</i></p>
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Functions of a Working Group are likely to be a combination of certain essential functions and desirable functions of Methods Groups as listed above, dependent on the specific project.

## Managing a Methods Group

Tips, advice and resources for managing Methods Groups can be found below. If you have any questions or would like further information about anything included in this document, contact [efleming@cochrane.org](mailto:efleming@cochrane.org).

### Methods Group structure and set-up:

- Generally, a loose, informal structure.
- Methods Groups are led by a small team of Convenors with often a group of consistently active members (e.g. 10-20), or internal sub-groups on various topics.
- Involvement in Methods Groups by Convenors and members is mostly on a personal and voluntary basis, next to regular work obligations.
- Methods Group Convenors sometimes rotate responsibilities, e.g. monthly rotation of Convenor on-call to answer queries and deal with CRG requests, or sometimes have assigned responsibilities; however, this is often quite a loose division of labour.
- Groups sometimes move in order to find a more supportive host organisation (host organisation support can include part-time Coordinator support for the Methods Group).
- In addition to the essential and desirable functions of Methods Groups listed on [Page 2](#) above, Groups have the option to develop their own governance and strategic documents, or annual plan, to guide their functioning, though this is not mandatory.

### Key roles with Methods Groups:

- **Convenor** – Convenors lead Methods Groups and the number per Methods Group can range from two to nine Convenors, with three to five a common number.
  - [Convenors automatically qualify for Cochrane Membership while they are in post.](#)
  - Convenors are required to declare any Conflicts of Interest (CoI Form) on an annual basis via their Archie record under ‘Roles’ (the CoI Form is linked to the role of Convenor).
- **Lead Convenor** or **Chair** - with a larger Convenor group sometimes a Lead or Chair Convenor is appointed.
- **Associate Convenor** – for early-to-mid career researchers involved in Methods Groups in a capacity similar to the Convenor.

- **Coordinator** – generally provides administrative support for day-to-day admin and management of the Group, incoming requests and queries, organization of workshops, etc.
- **Super User** (for Archie) – one or more Convenors/Coordinators will be assigned Archie Super User permission, which means they have maximum permission levels to manage group contact records and other information in Archie (Cochrane’s online database of documents and contact information):
  - o The ‘Super Users’ guide to Archie’ can be found [here](#).
  - o Specific guidance for Methods Groups’ Super Users can be found [here](#).
  - o An automatic email with instructions for Super Users is sent out automatically when a person gets a Super User role assigned.
- **Web Publisher** (for websites) – one or more Convenors/Coordinators will be assigned Web Publisher permissions to be able to update the Methods Group’s website. Each Group has its own dedicated website which it has a responsibility to maintain, with support if requested from the Methods Liaison Officer.
  - o Guidance for web publishers can be found [here](#).

#### Meeting style and frequency:

- A common meeting style and frequency for Methods Group Convenors (and possibly active Group members) is a teleconference every two to three months.
- Some Groups only hold a teleconference when an issue arises or before Colloquia.
- Generally, Groups only have a face-to-face meeting at Colloquia (often referred to as business meeting).
- Most communication is by email; most Groups have a mailing list
- Cochrane uses [Slack](#) (online chat platform) to encourage communication between members of its community. Methods Group Convenors can [log in to Slack with their Cochrane Account](#), which supports group calls or message threads for Convenors. For any queries, contact [support@cochrane.org](mailto:support@cochrane.org).

#### Recruiting new Convenors to a Methods Group:

- If you plan to recruit new Convenor(s) to a Methods Group, please inform the Methods Executive before the process begins via [methods-exec@lists.cochrane.org](mailto:methods-exec@lists.cochrane.org).
- Convenors must adhere to [Cochrane’s spokesperson policy](#), in particular, Section 3 on balancing academic freedom with membership responsibilities; with Cochrane audiences, you need to be clear on when you’re talking about Cochrane guidance and when you are talking about your Methods Group’s work, especially if it’s divergent to what’s in the *Cochrane Handbook*.
- Recruitment of new Convenors to a Methods Group will depend on the specific Methods Group’s preference – options include:
  1. Launch an open call to members within the Methods Group to put themselves forward, with current Convenors or members voting on the candidates (generally advised that this is via ranking candidates by preference):

- If you would like help setting up a webform for applications, contact [support@cochrane.org](mailto:support@cochrane.org).
  - Please inform Cochrane Central and the Methods Executive ([methods-exec@lists.cochrane.org](mailto:methods-exec@lists.cochrane.org)) if you are recruiting new Convenor(s) this way so they can help with advertising via social media platforms and/or the Review and Methods Digest.
2. Current Convenors can invite those who have the relevant time and expertise.
- How long Convenors serve in the role is the decision of the specific Methods Group (there is no defined or associated tenure).
  - When recruiting new Convenors, consider diversity, e.g. geographical variety and representation from Lower- and Middle-Income Countries (LMICS), gender, Early Career Professionals, etc.
  - Once a new Convenor has been identified, their CV should be sent to the Methods Executive for ratification, prior to their appointment.
  - It is advised that Methods Groups periodically have discussions between Convenors about succession planning, including the potential to mentor potential candidates.

#### Recruiting new members to a Methods Group:

- New members can sign-up to the Cochrane Methods Network and highlight the Methods Groups they wish to join via this [online webform](#), the Methods Liaison Officer processes the webform submissions and adds the selected roles (Group membership or mailing list only) in Archie
- Methods Groups should direct new potential members to this webform and ask that they select their specific method of interest or expertise when signing up (this is found on the top navigation panel of all Methods Groups' and the Cochrane Method's websites): <https://join.cochrane.org/what-you-can-do/methods>
- Convenors who are Super Users can adjust their settings in Archie to be notified when there is a change in membership for someone in their Methods Group: see [here](#) how to set this up.
- Methods Groups can recruit new members in the following ways:
  - At annual Methods Group meetings at Colloquia.
  - By showcasing their Methods Group at training events or during presentations (templates for slides and flyers can be found [here](#) or you can email [support@cochrane.org](mailto:support@cochrane.org) if you would like help putting these together).
  - By including links in your email signatory or other relevant materials.
  - By promoting through your networks and colleagues.
  - By using social media.

#### Engaging and communicating with Methods Group members:

- New members of Methods Groups are added to the Cochrane Methods Network and receive a [Welcome Pack](#) with details of how to get involved in Cochrane.
- Members of Methods Group generally fall into two categories:

1. **Active members** - those who want to be actively involved in the work of the Methods Group and contribute, e.g. through peer review, doing training workshops ('member' role in Archie).
  2. **Passive members** - those who want to receive updates and newsletters without further active involvement ('mailing list' role in Archie).
- Members of Methods Groups can be tagged differently in Archie depending on their declared interests or levels of involvement, so Methods Groups are able to target those who want to be contacted for different reasons - see [how can I use Archie group roles to keep track of my group membership](#).

### Options for communicating with your membership:

The following are compliant with data protection regulations. To avoid people needing to log into different platforms they all have the functionality to send email notifications when a new message is received. This way people can stay informed from their inbox and just log into the platform when they wish to participate. For further advice on moving your group discussion list into one of the channels below, please contact [support@cochrane.org](mailto:support@cochrane.org).

Options	Benefits
<b>Newsletters via MailChimp</b> – to send updates and emails. However, doesn't support communication between group members. Cochrane recommends using MailChimp to store contact details and send newsletters. Further guidance for <a href="#">newsletters is available here</a> . Please note that performing a bulk export of contact details from Archie to send newsletters is not permitted according to the law. Please see our Knowledge Base articles on <a href="#">data protection</a> for further details.	<ul style="list-style-type: none"> <li>• Compliant with data protection regulations as individuals can use the 'unsubscribe' link to control communication preferences</li> <li>• Templates for newsletters can be found <a href="#">here</a></li> <li>• Frequency will depend on the specific Methods Group</li> <li>• Allows people without a Cochrane Account to be kept up to date with your Group</li> </ul>
<b>Cochrane Forums</b> - Anyone with a Cochrane Account can access the forums. Groups could have a private topic but this does require manual curation (e.g. adding people to the list).	<ul style="list-style-type: none"> <li>• Individuals can see their posting history</li> <li>• Individuals can update their own details</li> <li>• Anyone whose Cochrane Account is deleted would no longer be able to access the forum</li> <li>• No individual contact details are visible within the Forums</li> </ul>
<b>Twitter</b> - Some Groups have moved their discussions to twitter for discussions although please be aware this would be a public space	<ul style="list-style-type: none"> <li>• Individual has own account and can unfollow a Group at any time</li> </ul>



**Community Slack** is currently available to people with certain roles within Cochrane Groups and has been successful in engaging people in discussions. Permission could be extended to other roles if needed. Each Group can have their own “channel” which can be open or private and can be introduced to new members when they join your group. Current channels include ME Support, RevMan user forum, PICO annotation discussion group etc

- Individuals can see what channels they belong to
- Anyone whose Cochrane Account is deleted would no longer be able to access Slack
- Individuals can control visibility of their contact details

- Some Methods Groups also host online webforms on their Methods Group website so their membership/wider public can submit questions or make requests – webforms can be set-up so the Convenors/Coordinators receive an email when a webform is submitted.
- Activities for Methods Group members could include ([further details are available in the Welcome Pack](#)):
  - o Involvement in methods projects – Convenors could email the membership for volunteers.
  - o Commenting on or involvement in developing guidance, including *Handbooks*, etc. – Convenors could email membership for feedback.
  - o Assisting during Methods Group training workshops or events – Convenors could email membership for volunteers.
  - o Act as advisors, peer reviewers or authors on Cochrane Reviews – members can use [TaskExchange](#) to find methods-based tasks to or Convenors could email the membership for volunteers. Other options for members to Connect, Participate and Learn in Cochrane can be found on the [Join Cochrane page](#).
- Since its inception in 2017, the Cochrane Membership Scheme allows anyone who joins Cochrane to contribute and earn points that count towards this Cochrane Membership. Therefore, anyone who belongs to a Methods Group can contribute to Cochrane and earn points towards Cochrane membership. Below is an overview of some of the tasks most relevant to methodologists. The full list of tasks and points can be found [here](#):

Contributor	Task*	Points per task
Author or co-author**	Author (or co-author) of a published Cochrane protocol	3000
	Author (or co-author) of a Cochrane review or review update	5000
	Author (or co-author) of a chapter in the Cochrane Intervention Handbook, DTA Handbook, any future Cochrane Handbooks or methodological guidance (such as MECIR)	5000
Peer reviewer**	Peer review a Cochrane protocol, review, update or chapters of official Cochrane Handbooks (this include searching or statistical peer review)	500
Trainer***	Co-ordinate and/or deliver workshops, seminars or symposia at Cochrane events	500
	Attend Cochrane events, inc. Colloquia	500

	Train consumers and others (e.g. CASP Critical Assessment Skills Programme) at Cochrane events	1000
Other	TaskExchange task e.g. data extraction	200

*\*All contributions considered worthy of recognition can be reported to the Membership team and added manually, even if outside the specific types listed above. For example, this could include authoring or peer reviewing of Cochrane’s methodological policies, papers and position statements.*

*\*\*Publication and peer review tasks completed via Archie workflow, are automatically credited with points. For instance, Methodologists who peer review a search strategy will be credited with points for this task, provided that the CRG records the task completion correctly via a workflow. The only exception to this is peer review of DTA reviews, which is completed outside Archie workflows.*

*\*\*\*The Membership team need to be informed about any contributions other than authoring and peer review (not including DTA peer review), to add these to contributors’ records. Alternatively, contributors can add their own contribution via the [Membership tab of their Cochrane Account](#).*

*+Methods Group Convenors, Executive group members, Scientific Committee members and Cochrane Handbook editorial teams (including all Editors) automatically receive Membership while in role).*

### Promoting your Group’s methods in Cochrane:

There are multiple ways you can promote your existing methods in Cochrane:

- [Editorials in the Cochrane Library](#).
- Cochrane Learning Live, [Training webinars](#) or webinar-series.
- Blogs or news posts on your website or the [Cochrane Methods website](#) (this can include announcements on key publications, training events, etc.), which can be shared across Cochrane social media accounts and within the [Review and Methods Digest](#).
- Use the Cochrane Methods Twitter account ([@cochranemthds](#)) or set-up your own Methods Group Twitter account.

Please contact [efleming@cochrane.org](mailto:efleming@cochrane.org) if you would like to discuss any of the above.

### Initiating new or different methods in Cochrane Reviews:

Any new or different methods from your Methods Group can first be discussed and assessed with other relevant Methods Groups and/or the Methods Executive.

Following this, if you would like to propose changes to methods or tools used in Cochrane, including pilots and full implementation, please submit details via the Cochrane Methods Website. Full details on the process, which will require proof of performance, can be found [here](#).

If you have any questions about the process or proposals, please email the Methods Executive ([methods-exec@lists.cochrane.org](mailto:methods-exec@lists.cochrane.org)).

### Benefits of working with Cochrane for Convenors and members:

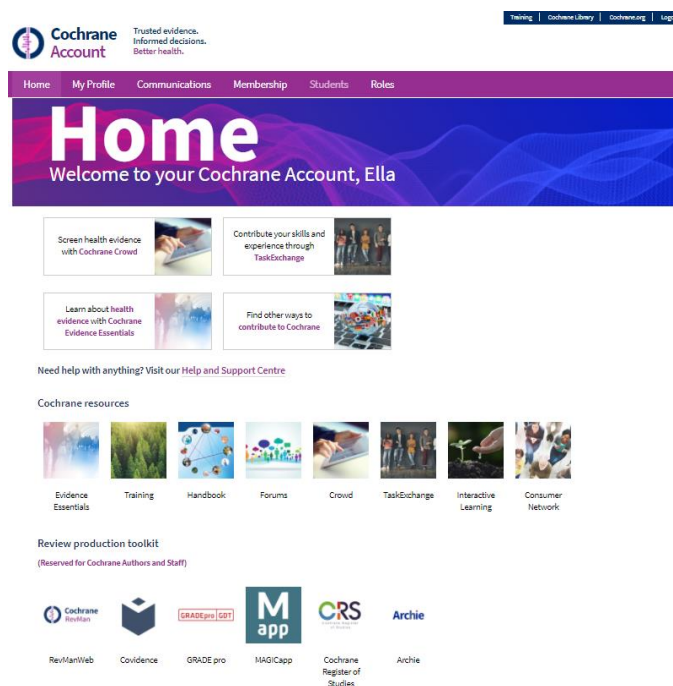
The intention of engagement with Cochrane through membership or Convenorship of a Methods Group is always to be mutually enriching and beneficial. Cochrane benefits through the time and



talent committed by methodologists from different disciplines and backgrounds, consistently fortifying its methodological base and making Cochrane the highly respected organisation it is. In turn, working with Cochrane can offer Convenors and Methods Group members the following benefits:

- [Cochrane Membership](#) – Convenors automatically qualify for Cochrane Membership while they are in the post and Methods Group members can complete tasks that count towards this Membership.
- Cochrane can provide letters of support for funding or other types of applications – please email [eflemying@cochrane.org](mailto:eflemying@cochrane.org).
- [Connect, Participate and Learn](#) - more details on how you can be a part of Cochrane, including connecting with others, participating in tasks and opportunities to learn.
  - o **Connecting** includes subscribing to our communication and newsletters, student bloggers posting about evidence-based healthcare, joining the Early Career Health Professional Group, joining the Cochrane Consumer Network (patients and carers), and following our social media.
  - o **Participating** includes becoming a Cochrane citizen scientist on [Cochrane Crowd](#), offering your skills in the task marketplace, [Cochrane TaskExchange](#), involvement in translation projects, or becoming an author or peer reviewer on a Cochrane Review.
  - o **Learning** includes our free [Evidence Essentials course](#), [e-learning](#) collections, attending webinars in our [Learning Live](#) programme, completing a placement or internship as part of Cochrane’s [International Mobility programme](#), and discovering [Cochrane learning events](#) around the world.
- Other benefits can be found in the [Methods Group welcome pack](#).

These benefits can all be managed and accessed through your Cochrane account (see below). You can access your Cochrane Account via this link: <https://account.cochrane.org/#!/home>.



## Support for Methods Groups

### How the Methods Executive can support you and your Methods Group:

The [Methods Executive](#) provides a leadership forum within Cochrane and ensures that all key methodological roles are able to meet and liaise. It provides an advisory role to the Editor in Chief and other Cochrane governance committees, as well as supporting the Methods Groups and wider methods community in Cochrane. The Methods Executive is a conduit for communication and information flow between the Methods Group Convenors and the Editor in Chief, Editorial Board, Scientific Committee, Cochrane Council and Cochrane Central Executive. Details on the Methods Executive, the current membership and Terms of Reference can be found via the [Cochrane Methods Website](#).

The Methods Executive hosts an annual Methods Group Convenors meeting at Cochrane Colloquia in which all key members of Methods Groups are invited to meet as a group.

If you would like to contact the Methods Executive for any reason, please email [methods-exec@lists.cochrane.org](mailto:methods-exec@lists.cochrane.org).

### How the Cochrane Methods Team can support you and your Methods Group:

The [Cochrane Methods Team](#) sits within the Editorial and Methods Department of the Cochrane Central Executive and supports the Methods Executive, the Methods Groups and the Convenors. This support ranges from answering queries, providing updates and information on developments within Cochrane to methods implementation, strategic development and organisation of webinars, amongst many other things. More information about team members and their specific roles can be found [here](#). You can contact the Methods Team via [eflemyng@cochrane.org](mailto:eflemyng@cochrane.org).

Resources for Cochrane Methods Groups can be found via the Cochrane Methods Website [here](#), including:

- [Methods Groups Overview: How to manage and develop Cochrane Methods Groups](#) (*this document*)
- [Developing methods guidance for Cochrane Reviews](#)

### Support through the Cochrane Methods Support Unit:

As part of the Methods Team, Cochrane has set up a dedicated Methods Support Unit (MSU) that aims to improve the consistency and methodological quality of Cochrane Reviews through support, peer review and training, and to facilitate implementation of new methods in Cochrane Reviews. Full details on the Methods Support Unit can be found [here](#).

The MSU can support Methods Groups by taking on certain queries sent through the Groups, or with issues the Groups themselves encounter around methodological issues. The MSU will also be a methodological bridge with the CRGs and the six CRG Networks.

### Support through Cochrane Community Support:

#### Resources for Groups

The Cochrane community website hosts detailed resources for a wide variety of Groups active within Cochrane (see [here for the full list](#)) – the following are of particular interest for Methods Groups:

- **Funding resources** – details of funding support, funding resources and current funding opportunities.
- **Brand resources** - branded templates and materials to help you communicate about your Methods Group, including [templates in Cyan](#) (official Cochrane Methods colour) for posters, blog shots, business cards, certificates, Word, email signature, letterhead, mail chimp for newsletters and PowerPoint in Cyan here.
- **Induction** - resources that can help new Convenors, Methods Group members or Coordinators get better acquainted with Cochrane, e.g. when a high level of engagement with the Cochrane Central Executive is required.
- [General Cochrane FAQs](#).

#### Support from the Cochrane Central Executive Team

The Cochrane community website hosts detailed information on how the Central Executive Team can support Groups (see [here for the full list](#)) – the following are of particular interest for Methods Groups:

- **Help and support** – including community support, technical support (inc. Archie and RevMan), requesting research data on Cochrane reviews and methods and requesting data for use by Cochrane Groups.
- **Cochrane Group Staff guidance** is collated in a Knowledge Base and includes:
  - 1) Cochrane Communications for Group Staff - the various communication channels that are available at Cochrane and how to use them.
  - 2) Cochrane Resources for Group Staff.
  - 3) Guidance for new Cochrane Group Staff (new Convenors).
  - 4) Guidance for when Staff (Convenors) leave a Cochrane Group.
  - 5) Guidance on data protection.
- **Super Users' guide to Archie** - including specific [guidance for Methods Group Super Users](#).\*
- **Web Master guidance** and Community blog post on '[Community blog post: 5 tips for a low-maintenance Cochrane group website](#)' – how to manage and make changes to your Methods Group website.
- **Guidance on storing and using personal data** - best practice summary for Cochrane Groups and ensuring GDPR compliance.

*\*The Methods Group Archie Knowledge Base is open to development by the Community Support Team and welcome questions or missing information that could help you manage your Methods Group – please contact [support@cochrane.org](mailto:support@cochrane.org).*

## **Policies**

The Cochrane community website hosts detailed information on Cochrane policies (see [here for the full list](#)) – the following are of particular interest for Methods Groups:

- [Cochrane Conflict of Interest Policy](#).
- [Organizational position statements](#) – including access to data from AllTrials, indirect costs, logo and endorsement policy, partnership policy and prospective RCT registration policy.
- [Policies for all Members and Supporters](#) – including complaints resolution procedure, organisational accountabilities, Principles of Collaboration, privacy policy and spokesperson policy.
- [Policies for Cochrane Groups](#) – including the Charter of Good Management Practice, Financial and resource monitoring of Groups, Group registration and changes, and survey and consultation policy.

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