Study Team Meeting Agenda Template

*Routine study team meetings are essential to study success and enabling Principal Investigator oversight. This meeting agenda template is provided as a resource and may be modified as needed. Instructions for use are in italics and should be deleted prior to use. There should be one individual responsible for recording notes during the meeting and an individual responsible for ensuring that the schedule of topics is followed.*

**OBJECTIVES:**

*Objectives for meetings should be specific and attainable during the meeting. Think about the audience for this meeting- are you meeting with the Principal Investigator? Sub Investigator? Coordinators?*

* To gather updates regarding outstanding study management tasks
* To discuss recruitment strategies to bolster the current study recruitment plan
* To review protocol amendment 3 and gather signatures for the training log

**TOPICS and SCHEDULE:**

*The topics and schedule portion of the agenda should break down the meeting into sections. Ideally, discussions regarding the topics should end on time to ensure an appropriate review of all topics. It is recommended that each topic begin with a word to indicate the nature of the topic (e.g., review, discussion, update, presentation, etc.) so attendees will know what to expect.*

|  |  |
| --- | --- |
| 1. Update: Items due February 28th:
	1. IRB renewal submission
	2. Data entry for participants 001, 002, 003
	3. Invoices for sponsor
 | 09:00-09:0 |
| 1. Discuss: Recruitment strategies
 | 09:10-09:25 |
| 1. Training: Protocol Amendment 3
 | 09:250-09:40 |
| 1. Review: Adverse events since last meeting
 | For 09:40-9:50 |
|  Open Discussion | 9:50-10:00 |

**TIMELINE:**

*Add major deliverables on a timeline so all attendees are aware of upcoming due dates.*

|  |  |  |
| --- | --- | --- |
| **Activity:** | **March 20th**  | **March 31st**  |
| IRB Renewal Due |  |  |
| Database Lock |  |  |

**RECRUITMENT AND ENROLLMENT UPDATES:**

*Add recruitment and enrollment data to a table in the agenda so all attendees are aware of progress.*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Date of Assessment** | **Eligible** | **Consented** | **Screen Failed** | **Enrolled** | **Complete** |
| 1/1/2021 | 50 | 25 | 5 | 20 | 10 |
| 2/1/2021 | 60 | 30 | 5 | 25 | 15 |
| 3/1/2021 | 65 | 30 | 5 | 25 | 17 |

**NEW PROTOCOL DEVIATONS:**

*Add any new protocol deviations since the last meeting to the agenda so study team members are aware, and the content can be addressed.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Date of Deviation** | **Deviation** | **Reportable to IRB?** | **Corrective Action Taken?** | **Outcome** |
| 2/8/2021 | Participant 001 did not have baseline visit within window  | No | Yes | Participant consulted on importance of visits; all visits within the next six months already scheduled. |