



A5. RESEARCH PROJECT MEETING MONITORING^a

Instructions for Teacher:

- Meet with your learner for a one-on-one teaching session to review the high-level steps to prepare for a Research meeting.
- Be prepared to walk the learner through the steps if needed.
- After your initial meeting with the learner, revisit this checklist with them on a regular basis (e.g. quarterly) to explore and support their progress.

Questions to prepare a learner for discussion at a research meeting

1. Has a timeline been developed for the research study that includes additional time (at least 25%) for inevitable delays? (refer to teaching tool T8)
2. What strategies have been implemented to deal with unexpected challenges, suggestions for useful research resources at your institution, and time-management?
3. Have you consulted the Program Director, Research Director and the research personnel in your department to learn more about the available resources to help you with your research project at your institution?

Summary checklist for review at a research meeting

- Pre-study
- Develop protocol
- Consult with statistician (if applicable)
- Develop study procedures (e.g. data collection form, mechanisms for tracking progress, etc.)
- Identify potential sources of funds
- Develop study timetable (plan for delays)
- Ethics submission and approval
Approval date _____
- Determine roles and responsibilities of study team
- Determine method(s) and timing of routine study-related communications (e.g. bi-weekly updates)

Start-up

- Hire and train study staff (if applicable)
- Establish research account (if applicable)
Account number _____
- Develop and initiate monitoring

Ongoing

Routinely monitor:

- Recruitment of study participants/response rate for surveys
- Adherence to protocol
- Data quality
- Consistency of clinical and laboratory procedures and/or assessments by multiple assessors
- Confidentiality
- Study budget
- Other

Maintain relevant correspondence with Research Ethics Board regarding:

- Request for annual approval
- Amendments to protocol and/or consent forms
- Reports of serious adverse events
- Study closure

Schedule routine meetings and/or contact with preceptor and study team

Post-study

- Complete follow-up for participants (i.e. communicate study results)
- Perform data analysis (with statistician if applicable)
- Review study documentation with preceptor
- Archive all study documents as per institutions requirements

^a Ackroyd-Stolarz S. Managing and monitoring a study. In Harvey BJ, Lang ES, Frank JR, editors. *The research guide: a primer for residents, other health care trainees, and practitioners*. Ottawa: Royal College of Physicians and Surgeons of Canada; 2011. Reproduced with permission.