



# Australia–New Zealand Site Landscape Benchmark Your Site

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ANZ Site Solutions Summit™



# SPEAKERS



**Jimmy Bechtel, MBA**

*Chief Site Success  
Officer*  
SCRS, USA



**Sjaan Evans, MSc**

*Chief Operating Officer*  
Pacific Clinical  
Research Network, NZ



**David Vulcano, MBA,  
LCSW, CIP, RAC, FACRP**  
*Honorary President*

SCRS, USA



# FACULTY DISCLOSURE

In compliance with ACCME Guidelines, I hereby declare:

I do not have financial or other relationships with the manufacturer(s) of any commercial services(s) discussed in this educational activity.

Jimmy Bechtel, SCRS, USA

Sjaan Evans, Pacific Clinical Research Network, NZ

David Vulcano, SCRS/HCA Healthcare





# Criteria for AWARDING CONTACT HOURS

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Applicants must be present during the “live” event, contact hours are not issued for recordings

Applicants must attend the activity the whole time, missing no more than ten minutes of the activity

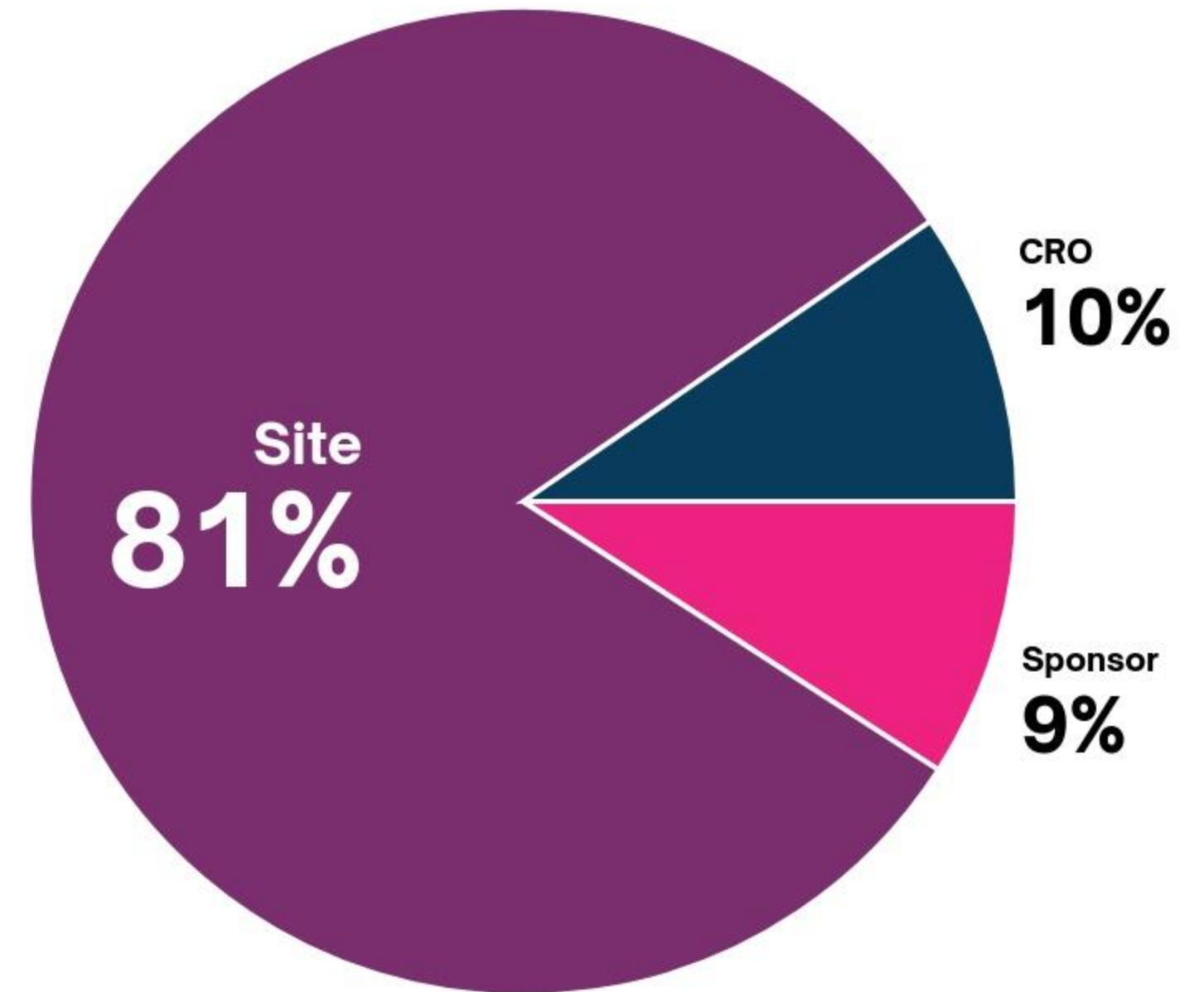
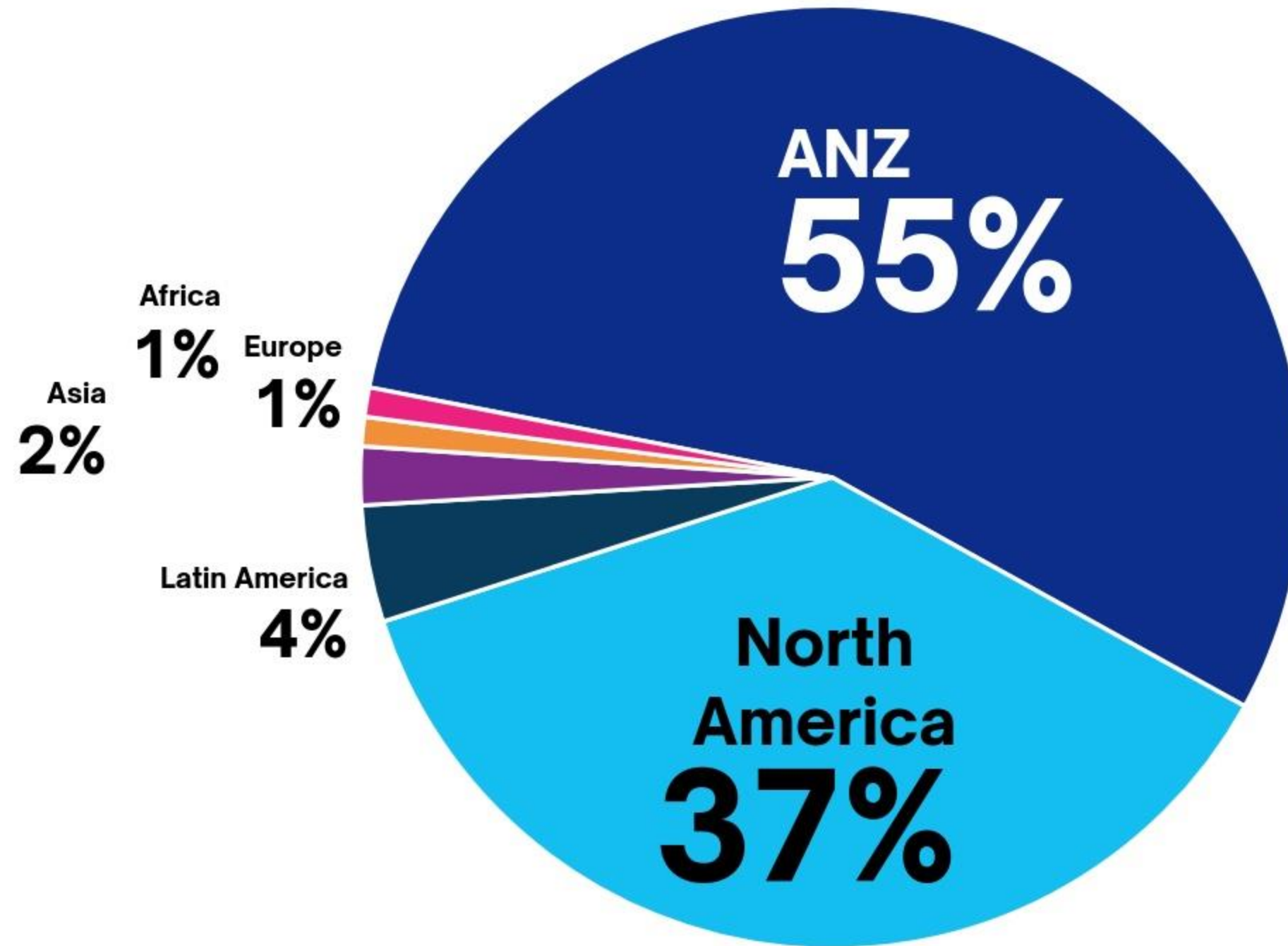
Applicants must complete the post-meeting survey with a score of at least 70%

Applicants must complete the post meeting survey evaluation questions

Society for Clinical Research Sites, Inc. is accredited as a provider of nursing continuing professional development by the American Nurses Credentialing Center’s Commission on Accreditation



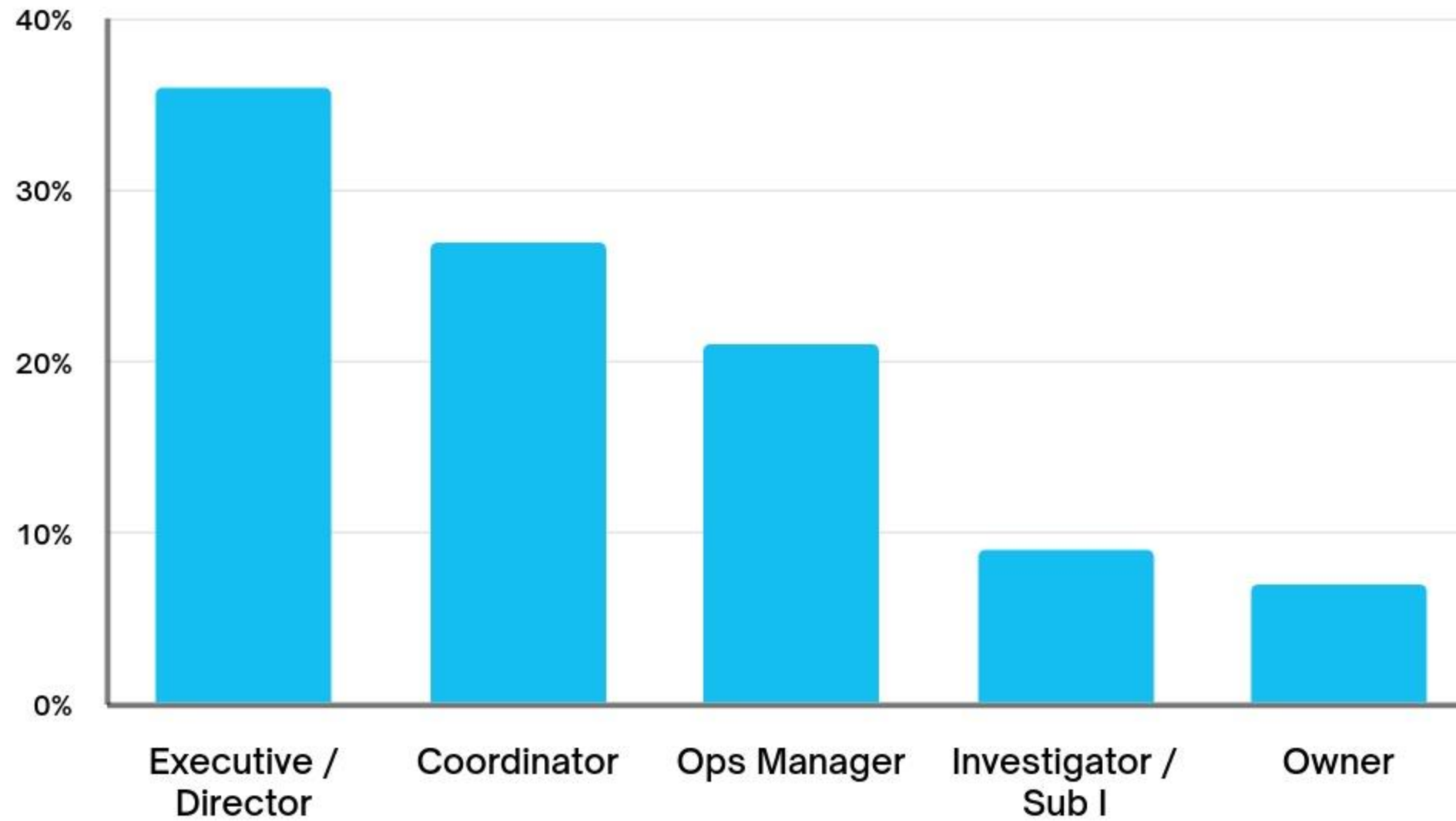
# Respondent Profile



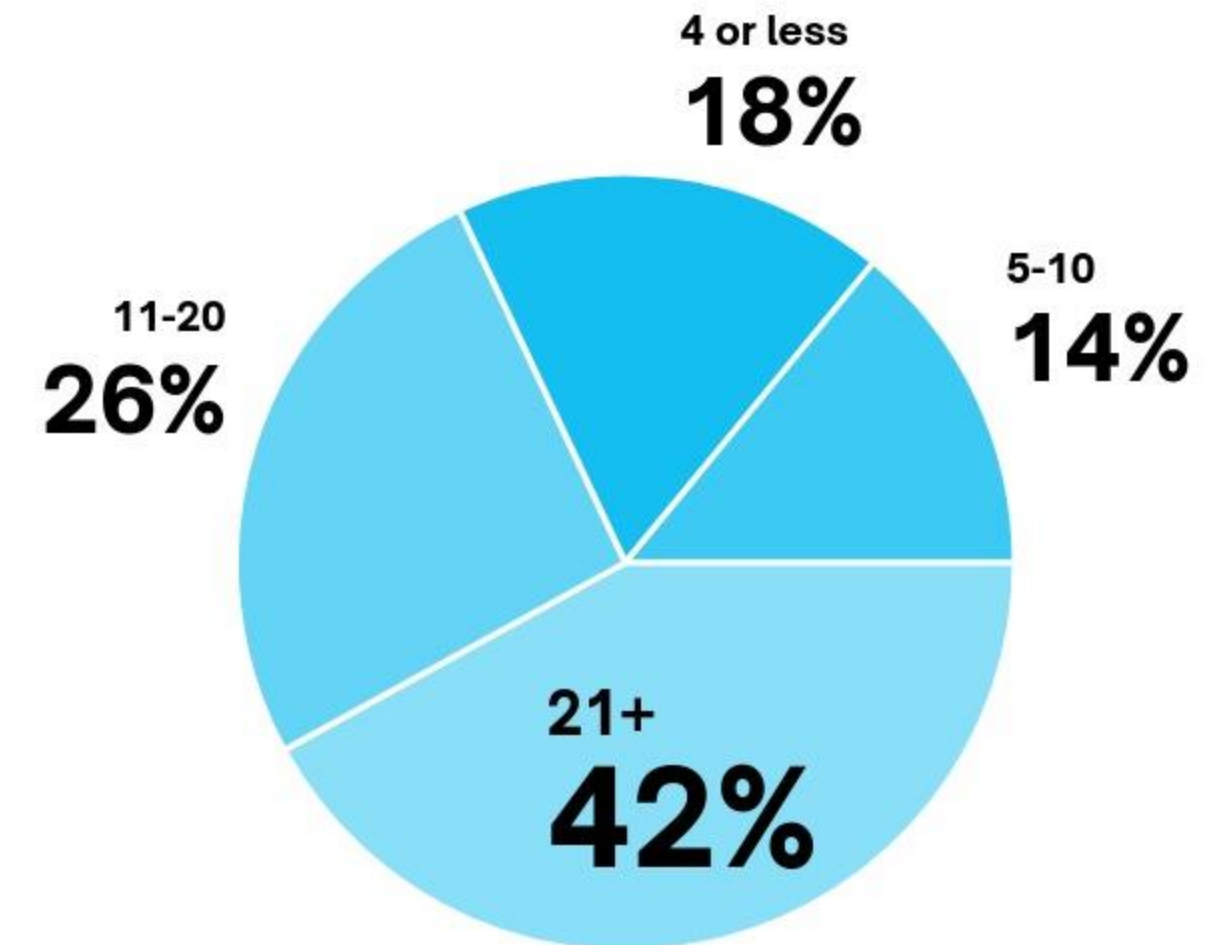


# Role Demographics

## Current Role

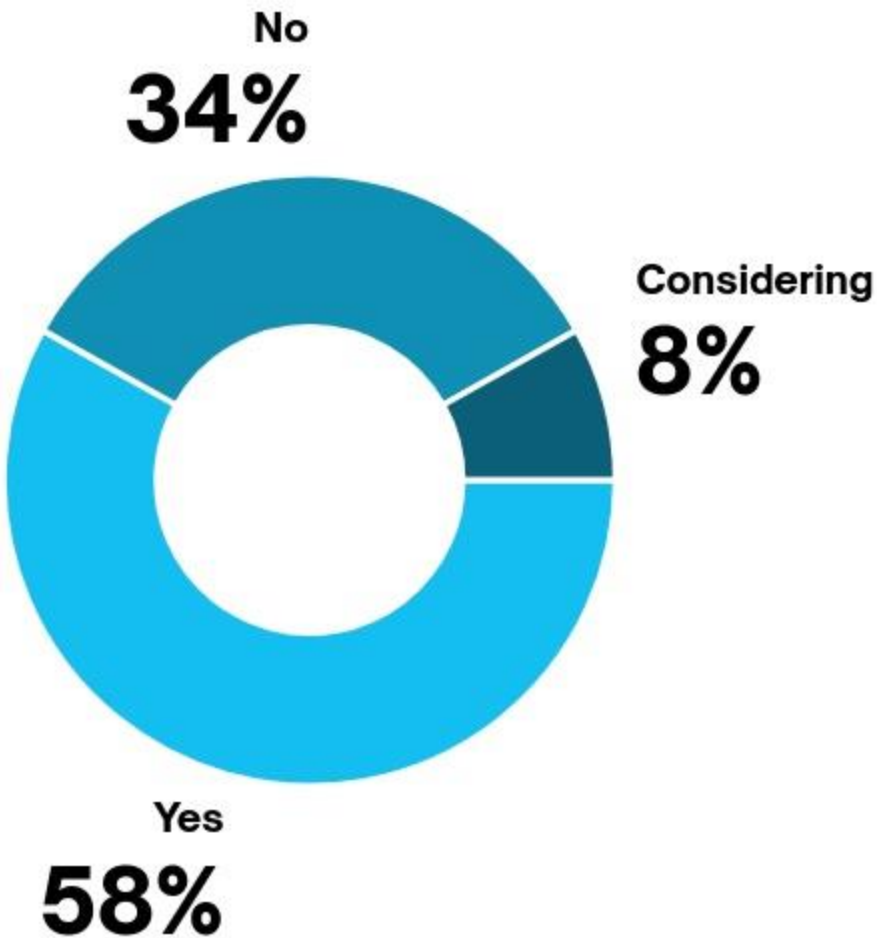
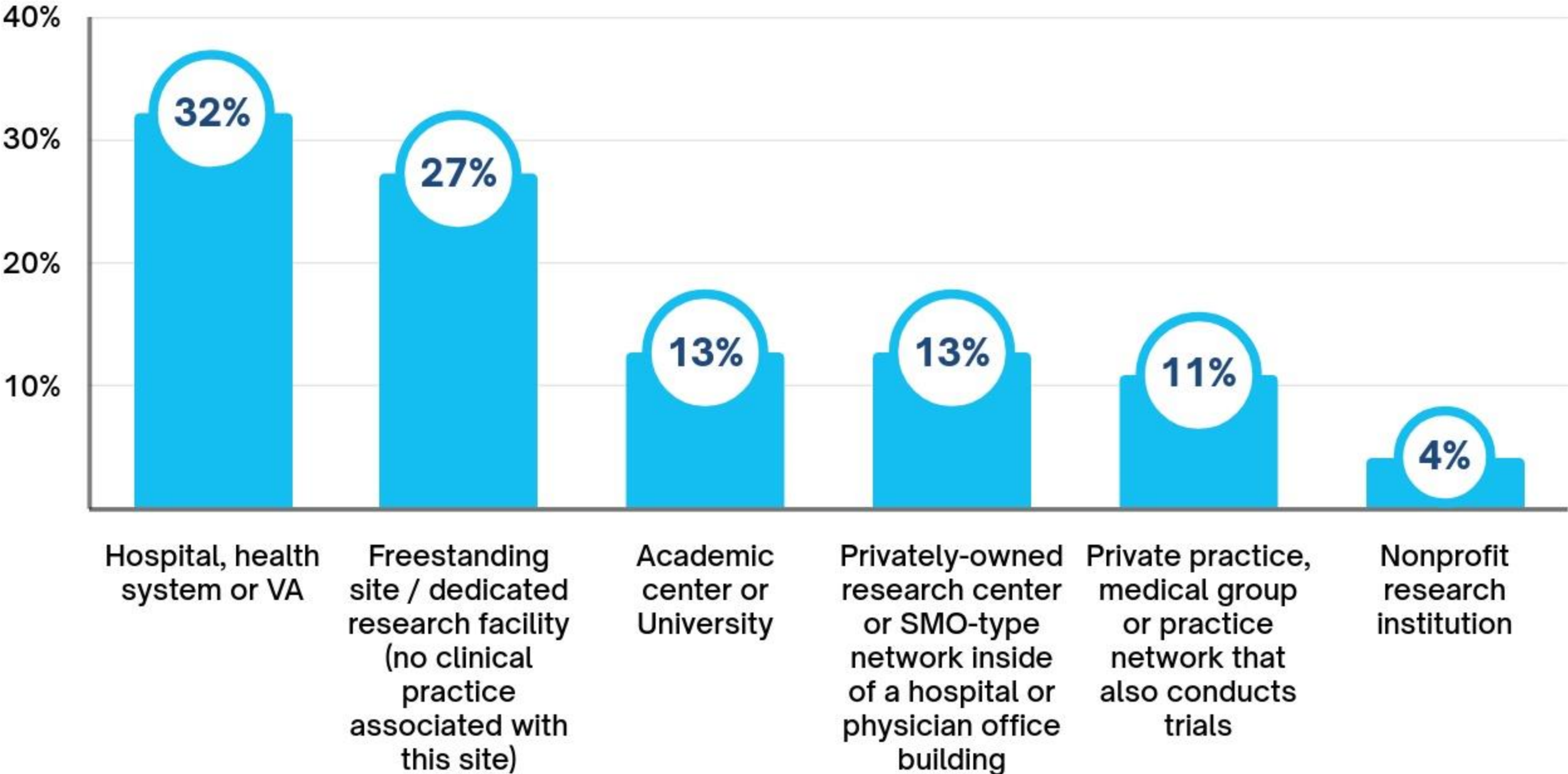


## Years Site Has Been Involved in Clinical Research



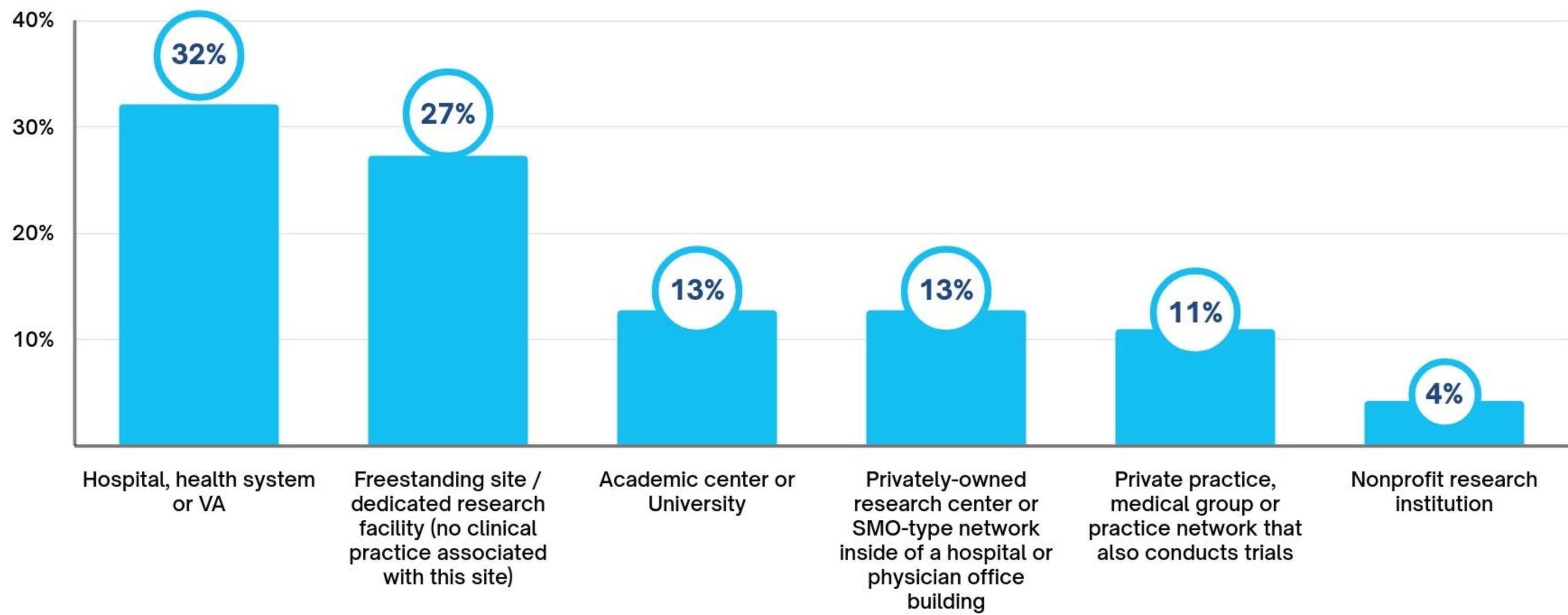


# Site Organization Type





# Site Organization Type

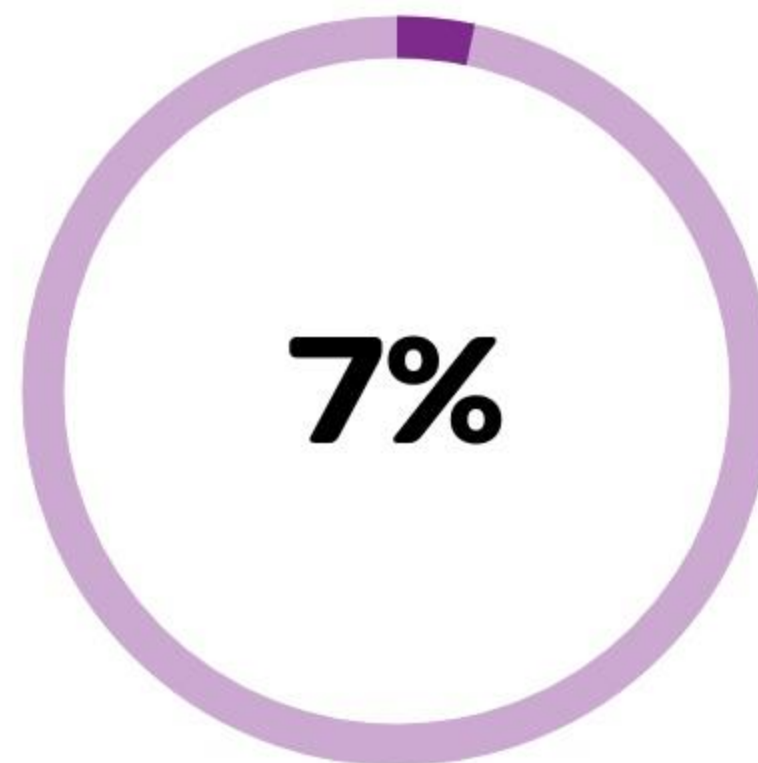




# Site Network



**Yes**



**No, but considering**



**No, and no plans**



Section 1

# Study Volume, Delays & Cancellations

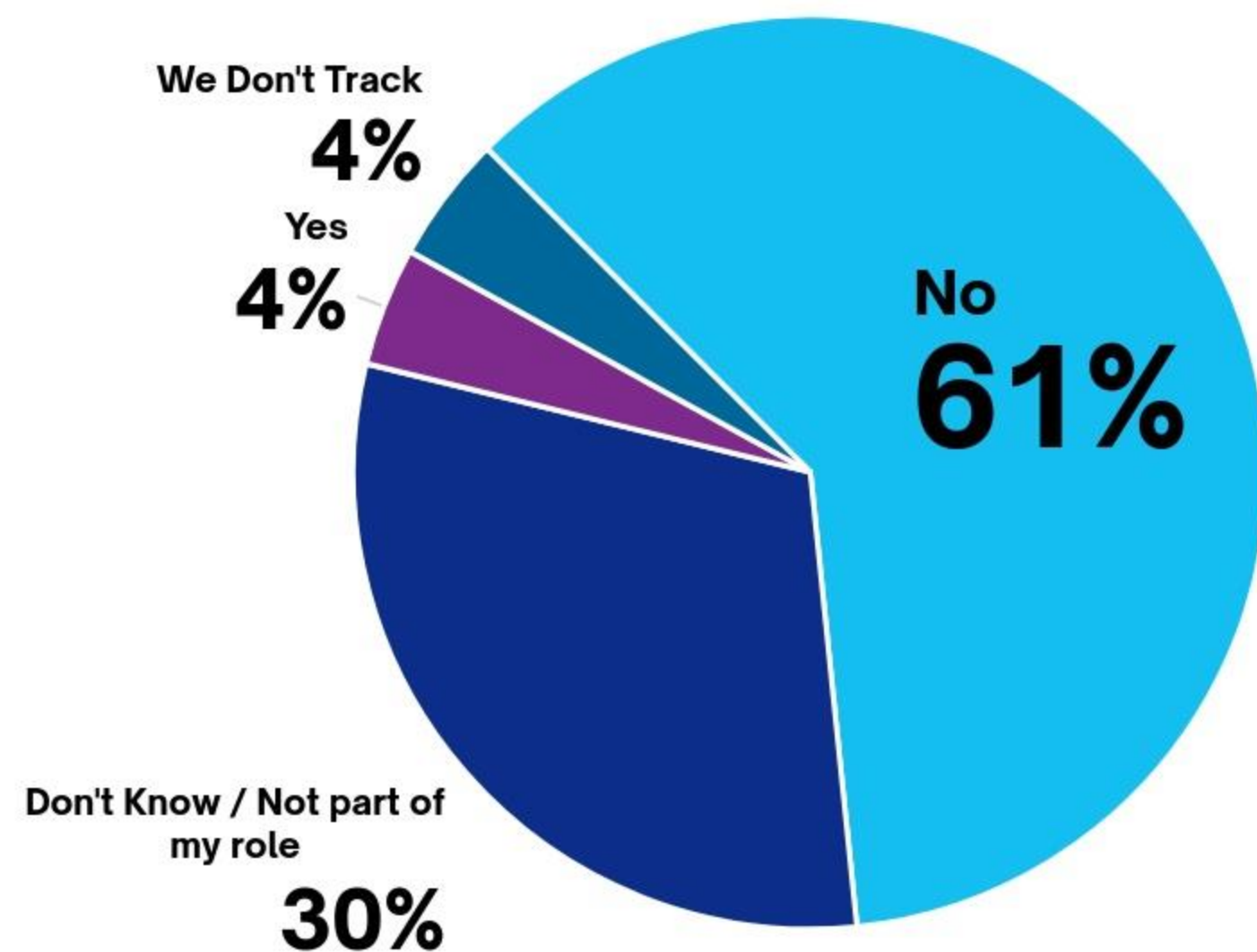
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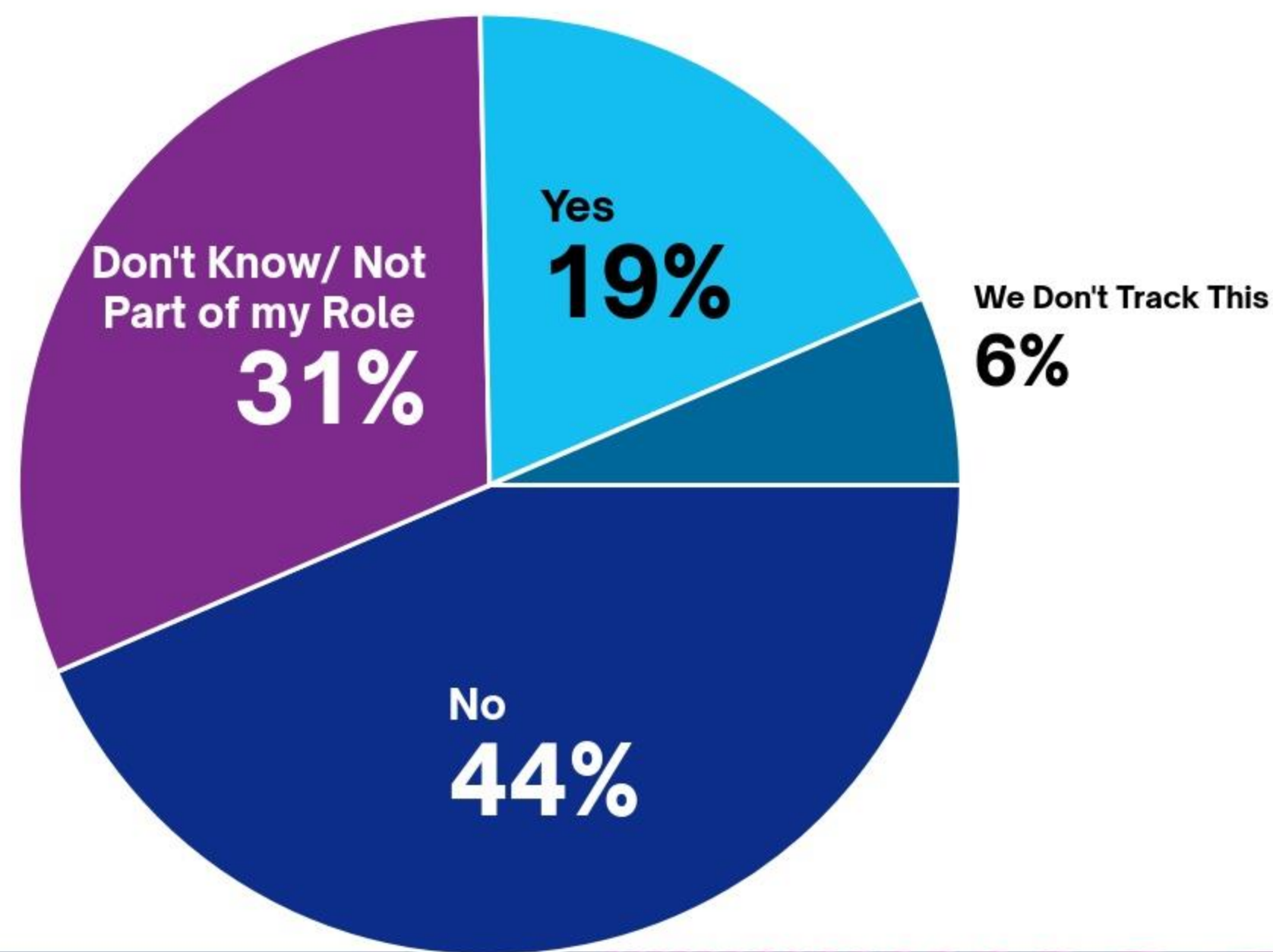


# Study Opportunity Decline

## Experienced a Decline in Study Opportunities?



## Did You Decline More Trials?





# Reasons for Declining Clinical Trials

**1** Site does not have protocol-required patient population (48%)

**2** Staffing challenges at the site (28%)

**3** Could not agree on budget (24%)

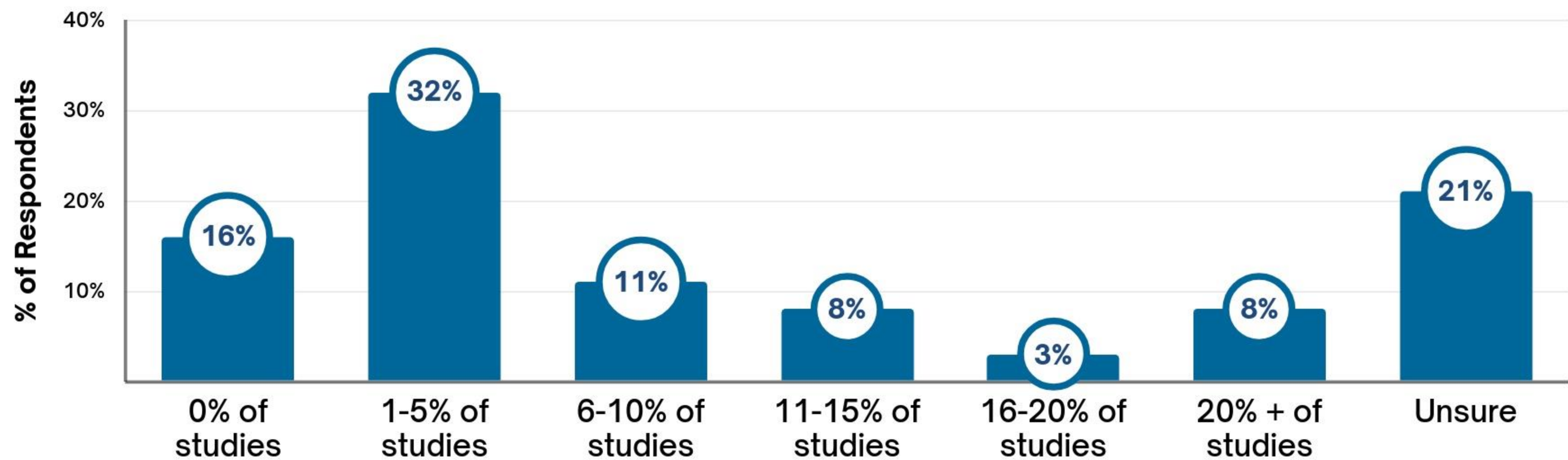
**4** Site had competing study / studies (24%)

**5** Other reasons

**\*Of those that declined, Select up to 2\***



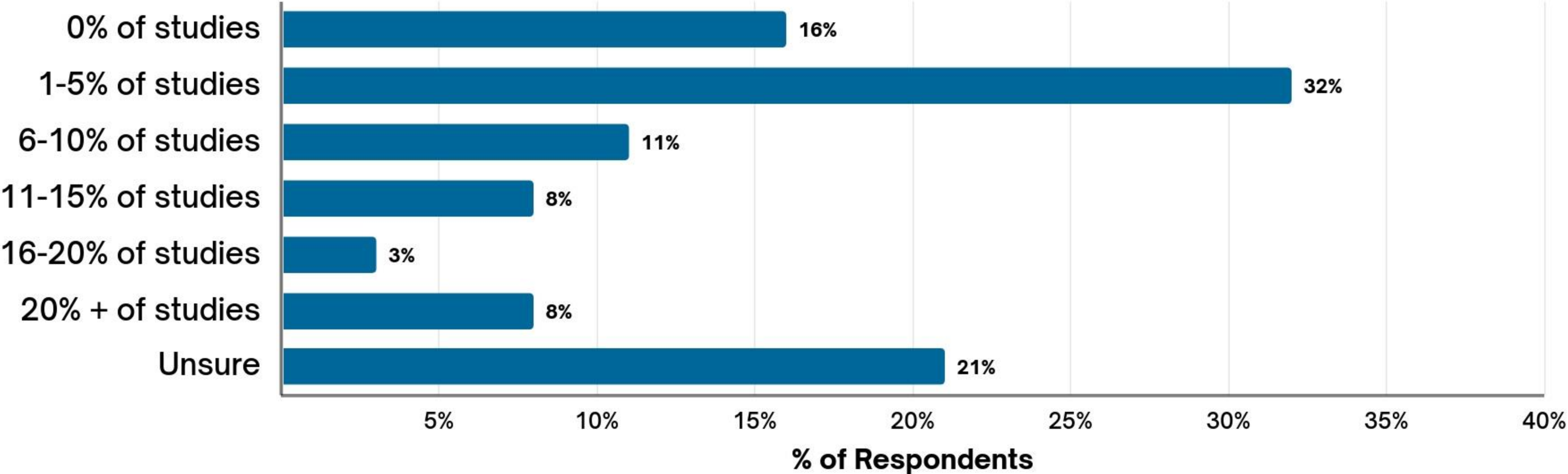
# Study Opportunities Cancelled Before Enrollment (By Sponsor or CRO)



**The majority of respondents (32.2%) experienced cancellation of 1-5% of study opportunities at their site in the past 12 months.**



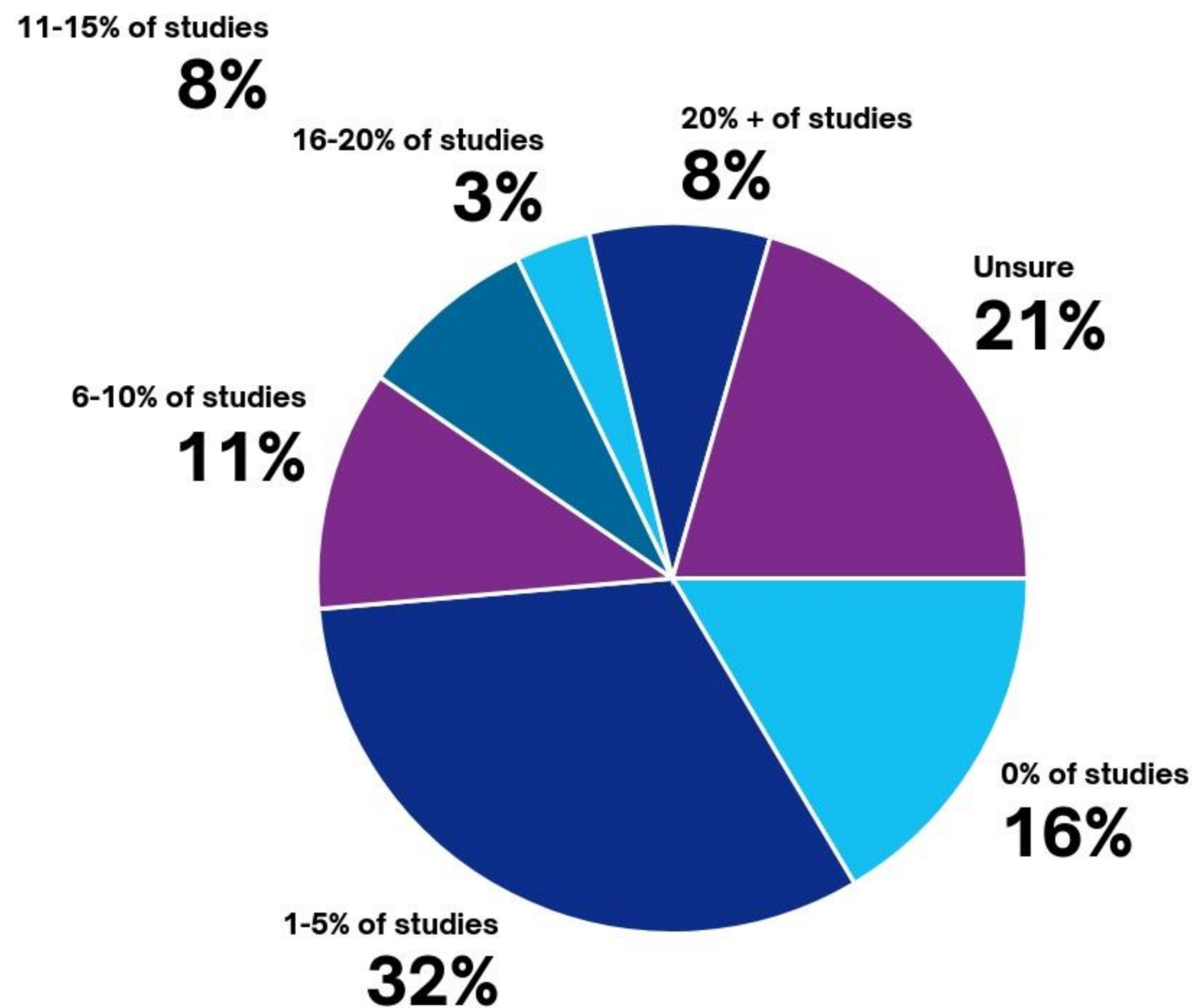
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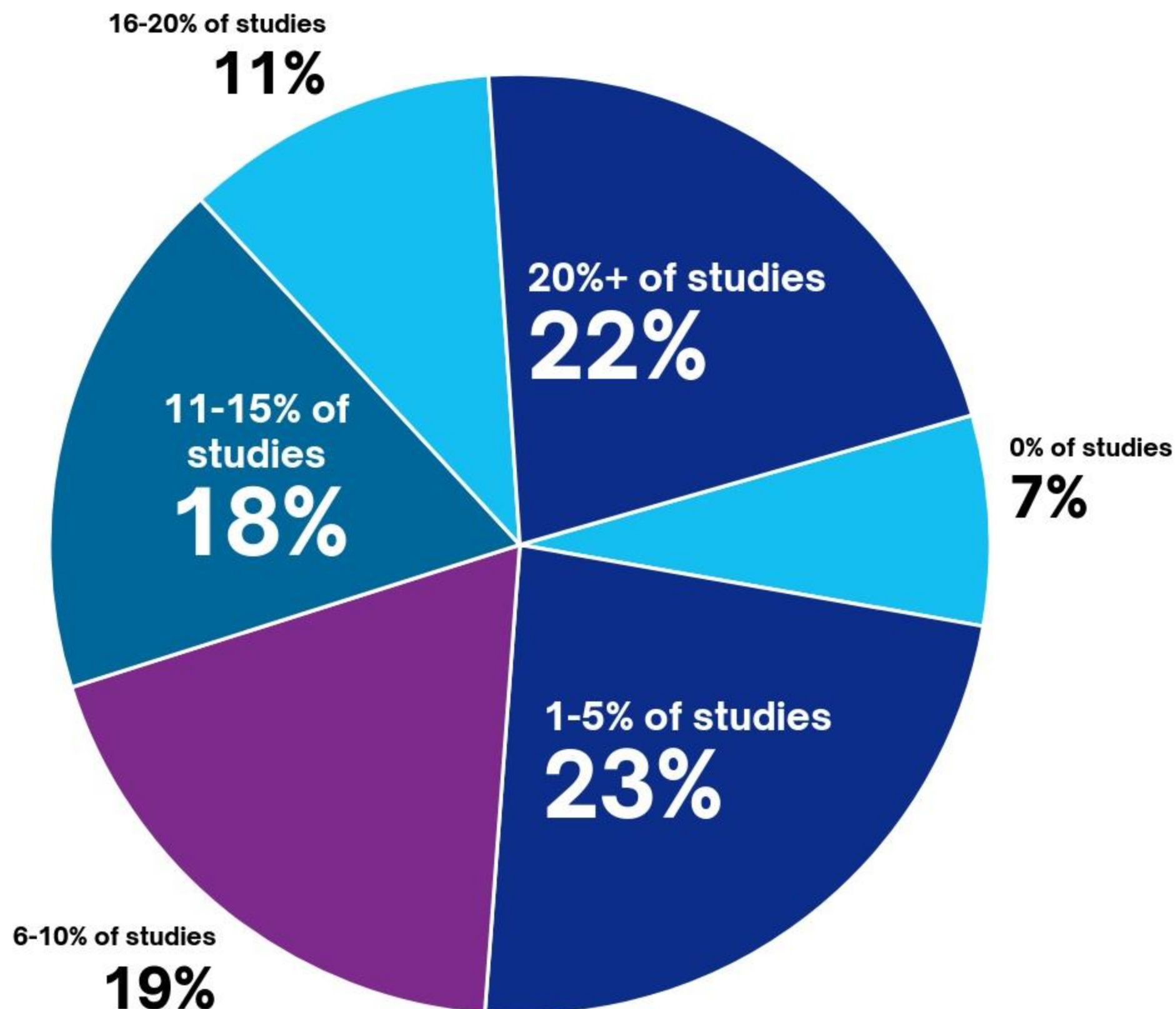


The majority of respondents (32.2%) experienced cancellation of 1-5% of study opportunities at their site in the past 12 months.



# Study Opportunity Delays Greater Than 30 Days

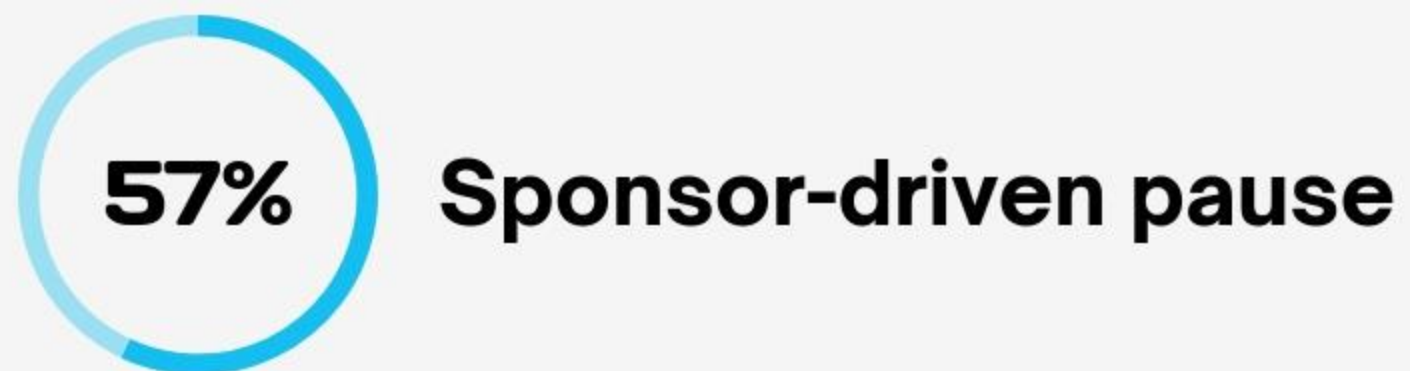
(By Sponsor or CRO)



The majority of sites (over 50%) had more than 11% of their trials delayed in the past 12 months.



# Reasons for Delayed Trials



\*Of those that declined, Select up to 3\*



# Reasons for Cancelled Trials



**Sponsor-driven  
cancellation with  
explanation**



**Insufficient budget**



**Sponsor/CRO did not  
specify**



**Site was not enrolling**



**Protocol complexity**

**\*Of those that declined, Select up to 3\***



# Strategies to Reduce Clinical Trial Delays and Cancellations



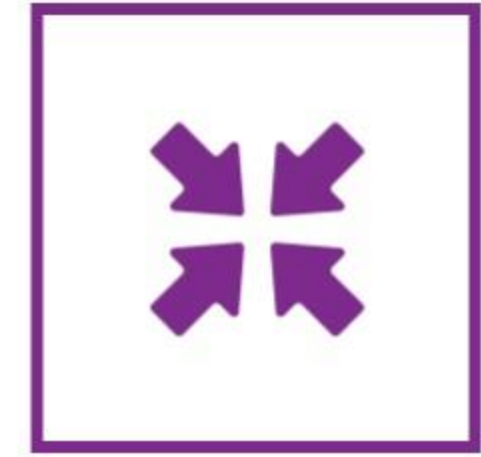
## **Stronger communication channels with Sponsor/CRO**

40% said improved coordination and transparency with study sponsors and contract research organizations to address issues more efficiently.



## **Increasing staffing capacity**

25% hired additional personnel to handle increased workload and support trial operations more effectively.



## **Quicker and stronger budget or contract negotiations**

24% said streamlined the financial and contractual processes to reduce delays in trial initiation and execution.

**35% also feel they have no influence over the cancellation or delay of trials.**



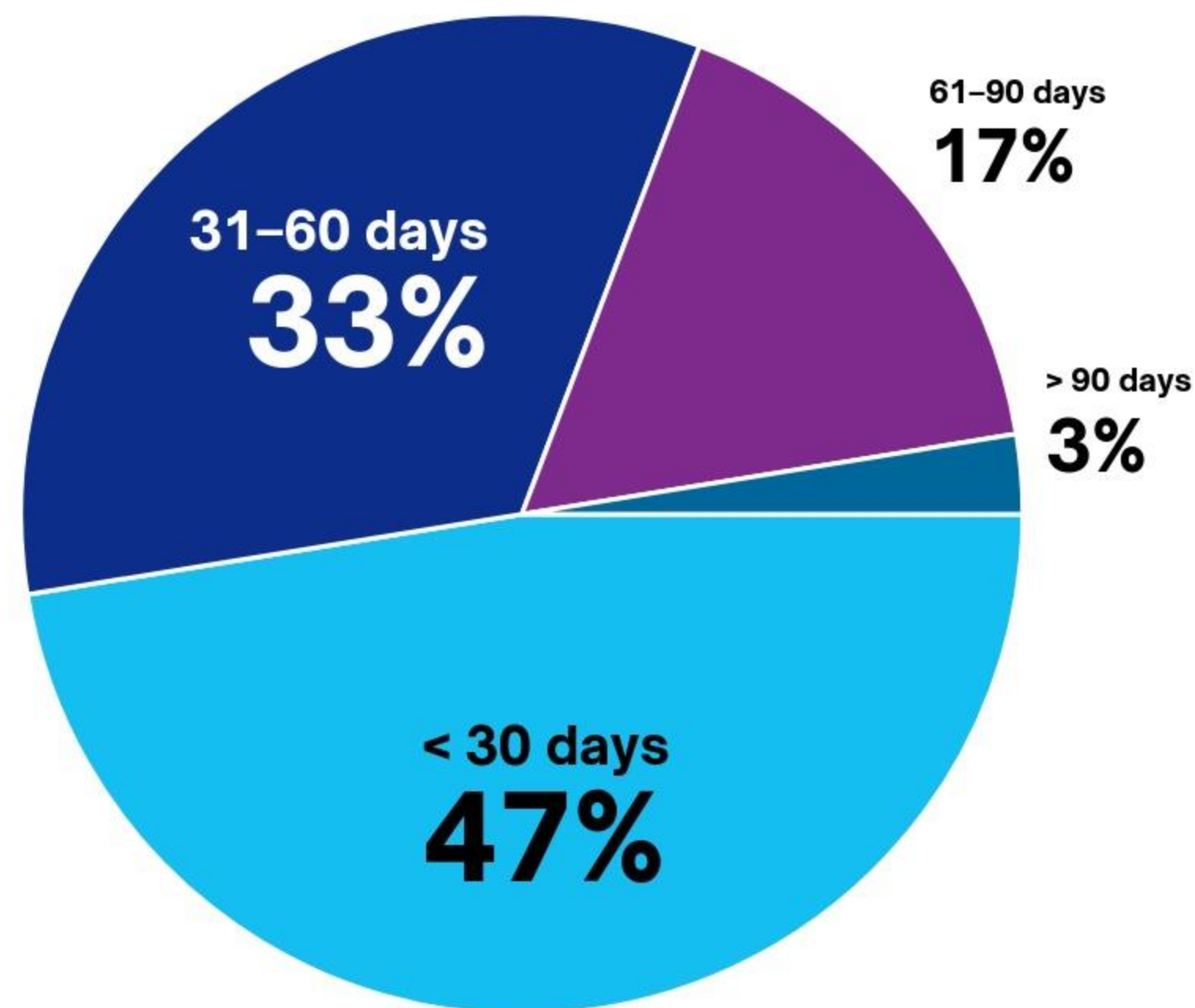
Section 2

# Contracts, Budgets & Payments

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# Average Clinical Trial Agreement Finalization Timeline



The majority of clinical trial agreements/contracts are finalized within 60 days. Nearly half (47.4%) are completed in 30 days or less.

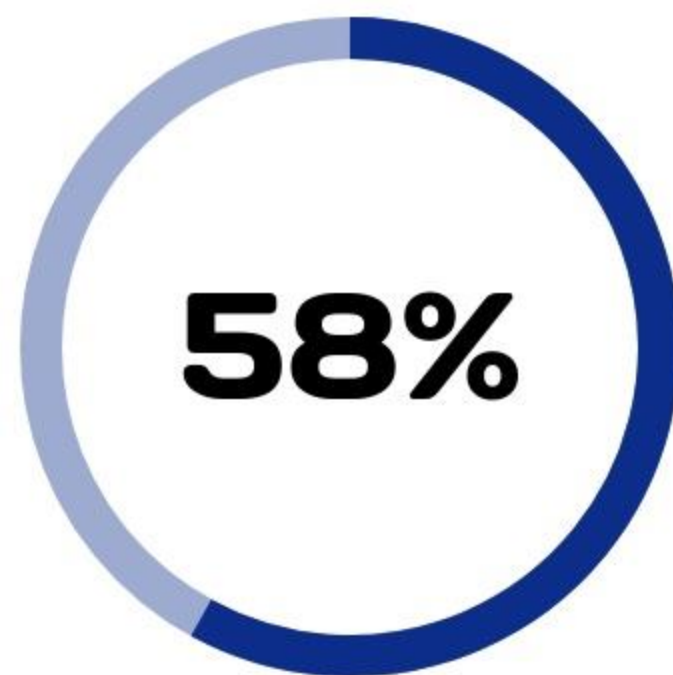


# Factors Delaying Contract Finalization

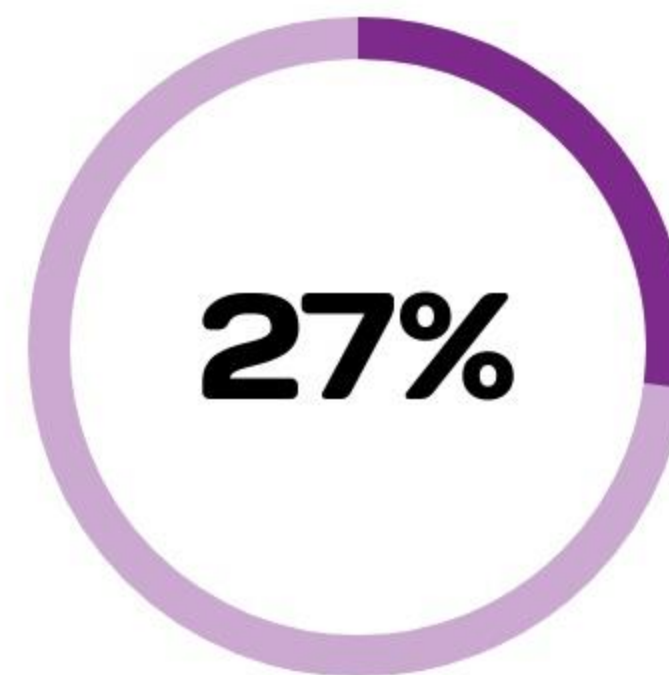
Select up to 2



**Sponsor  
Responsiveness**



**CRO  
Responsiveness**



**Site Legal Review  
Process**



**Internal Capacity  
Review**



# Improving Contract Finalization Time



## **Templated language - 21%**

Develop standardized contract templates with pre-approved language, reducing the time spent on legal review and revisions.

**33% for ANZ Audience (#1)**



## **Dedicated staff for contract negotiation - 43%**

Assign a team of experts to handle contract negotiations, leveraging their specialized knowledge and experience to streamline the process.

**29% for ANZ**

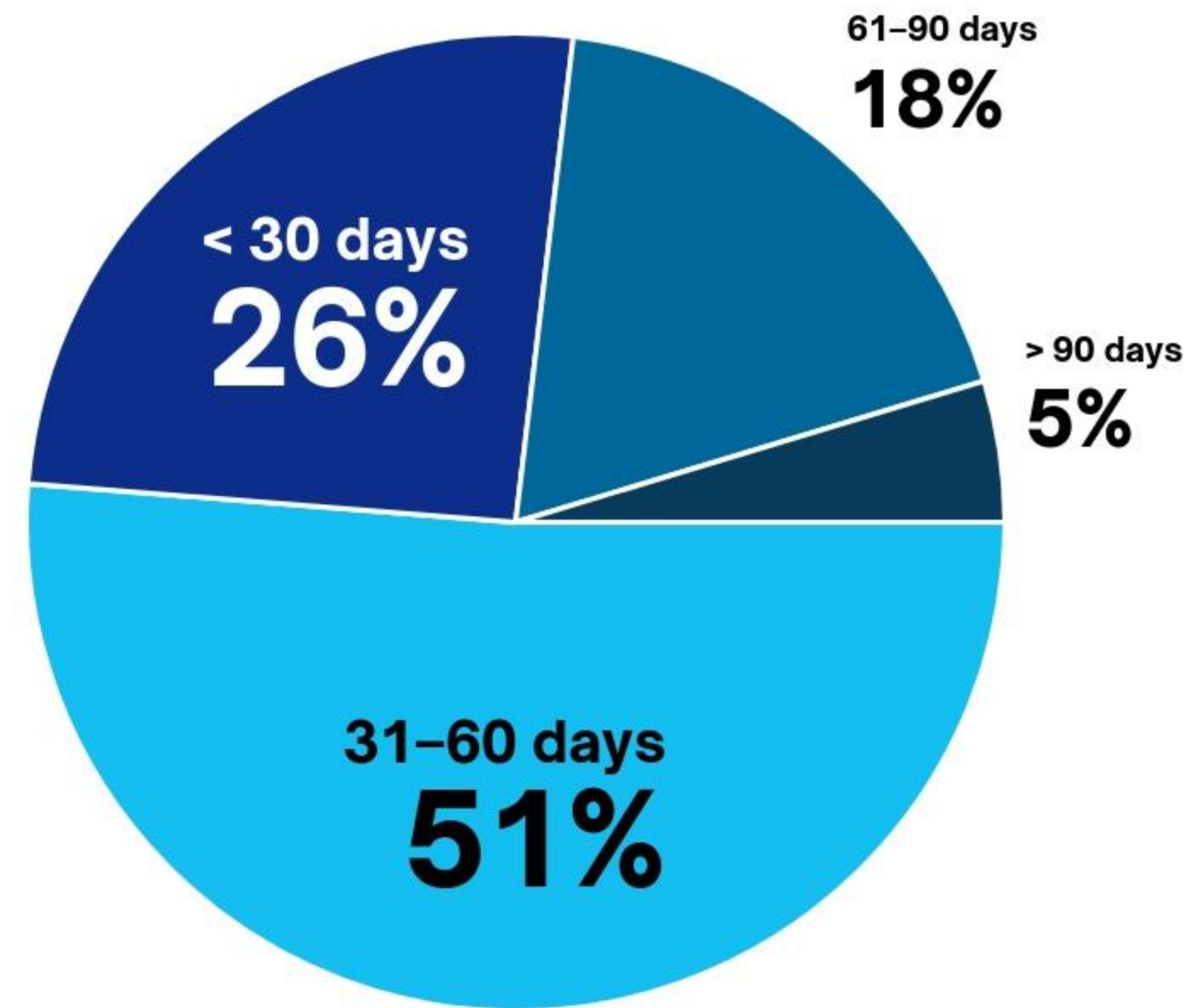


## **We have not been able to improve contract turnaround time - 20%**

Despite efforts, the organization has struggled to find effective solutions to reduce contract finalization time.



# Budget Finalization Timeline



Compared to Global data, ANZ lags behind. Globally, 40% of budgets are finalized within 30 days compared to only 26% in ANZ.



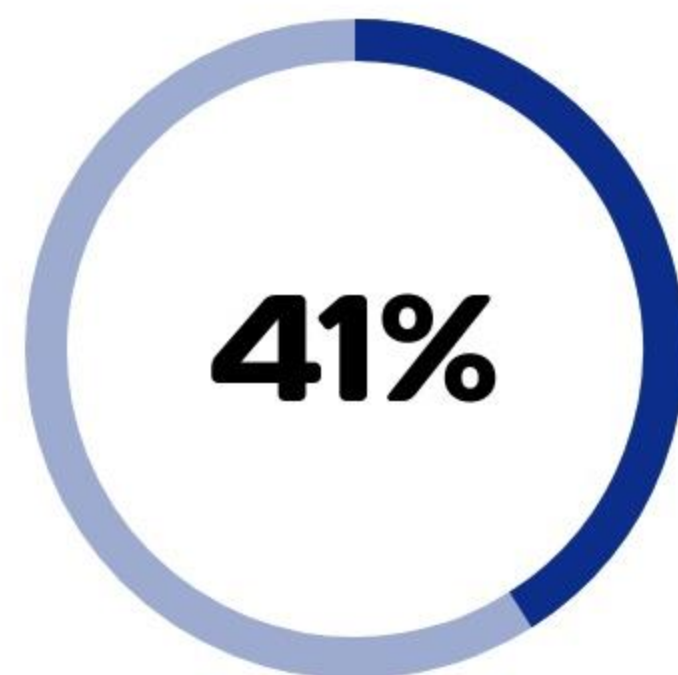
# Factors Delaying Budget Finalization

Select up to 2



**Large budgetary misalignment**

#1 Answer in ANZ at 38%



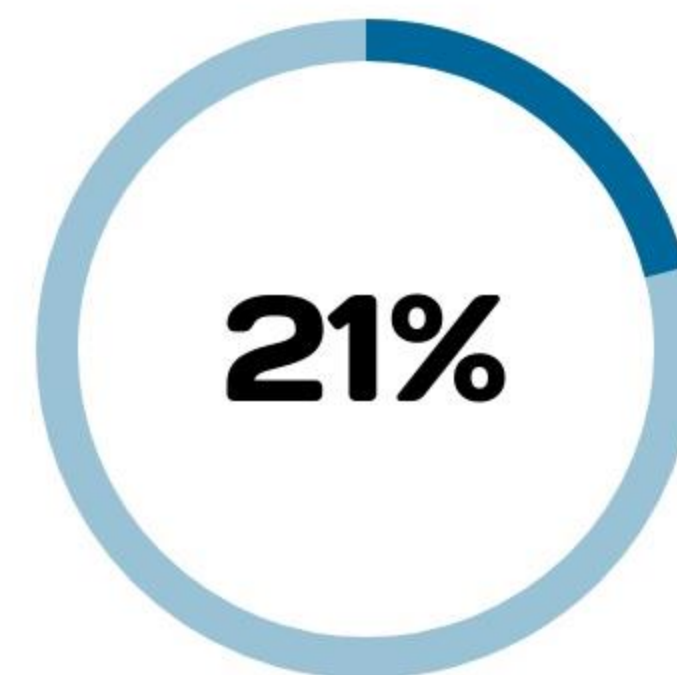
**Lack of Sponsor responsiveness**

#2 in ANZ at 32%



**Lack of CRO responsiveness**

#5 in ANZ at 18%



**Lack of internal capacity or resources (ANZ)**

#6 answer globally



# Improving Budget Finalization Time



## **Dedicated staff for contract negotiation - 29%**

Assign a team of experts to handle contract negotiations, leveraging their specialized knowledge and experience to streamline the process.



## **Budgetary Start point - 21%**

Develop a effective and realistic starting point, laying an effective foundation for budgetary negotiations

**#3 answer globally**

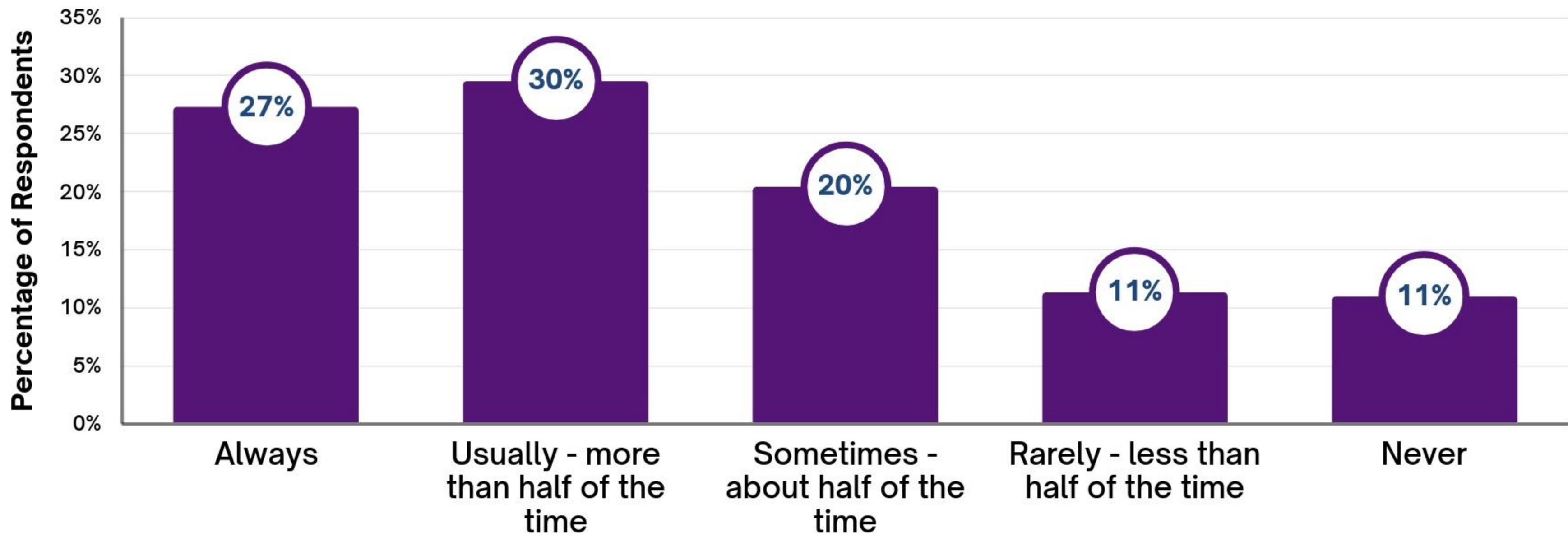


## **Detailed Justifications - 18%**

Building and establishing effective and detailed justifications for budgetary items is essential



# Frequency of Initial Budgets Received with 0% Withholding





# Commonly Underfunded Budget Items



## Startup Costs

Startup costs account for the largest share at **58%**, making them highly vulnerable to underfunding.



## Screen Failure Reimbursement

With **50%** of the budget allocated to screen failure reimbursement, this category is significantly affected by underfunding.



## Training

Recruitment, at **41%**, is the third-largest category impacted by underfunding.

**Recruitment is number 3 globally at 42%**



# Effective Negotiation Strategies for Securing Budgets

Select up to 2



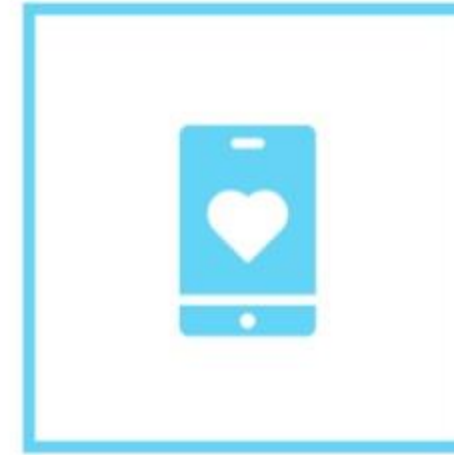
## **Better knowledge of our costs (61%)**

Thoroughly understanding our own costs and expenses helps us build a more realistic budget proposal.



## **Improving our justification language (43%)**

Using clear, persuasive language to justify our budget requests makes them more compelling.



## **Phone calls or meetings instead of emailing (37%)**

Face-to-face communication allows for more nuanced negotiations and can lead to better outcomes.

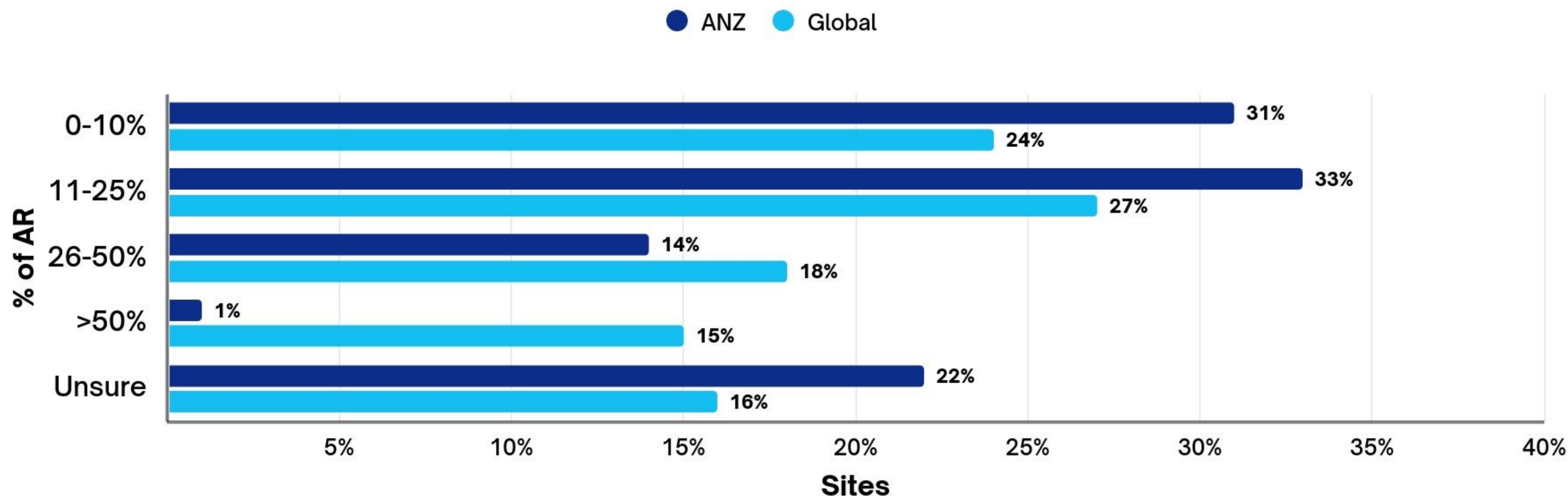


## **Being willing to walk away (25%)**

Maintaining leverage by being prepared to decline an unacceptable budget shows our commitment to fair negotiations.



# Average % of A/R 90+ Days Old

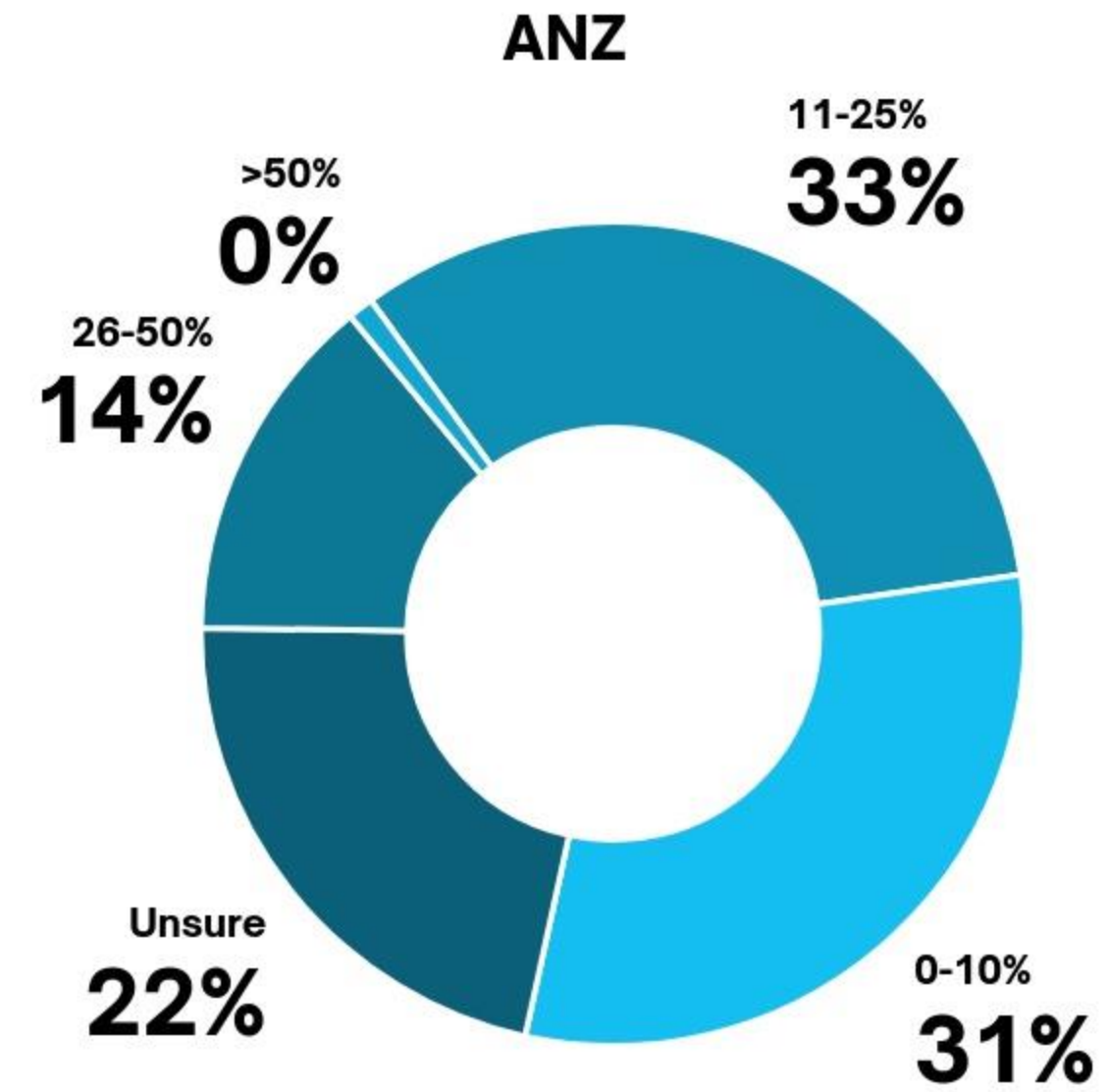
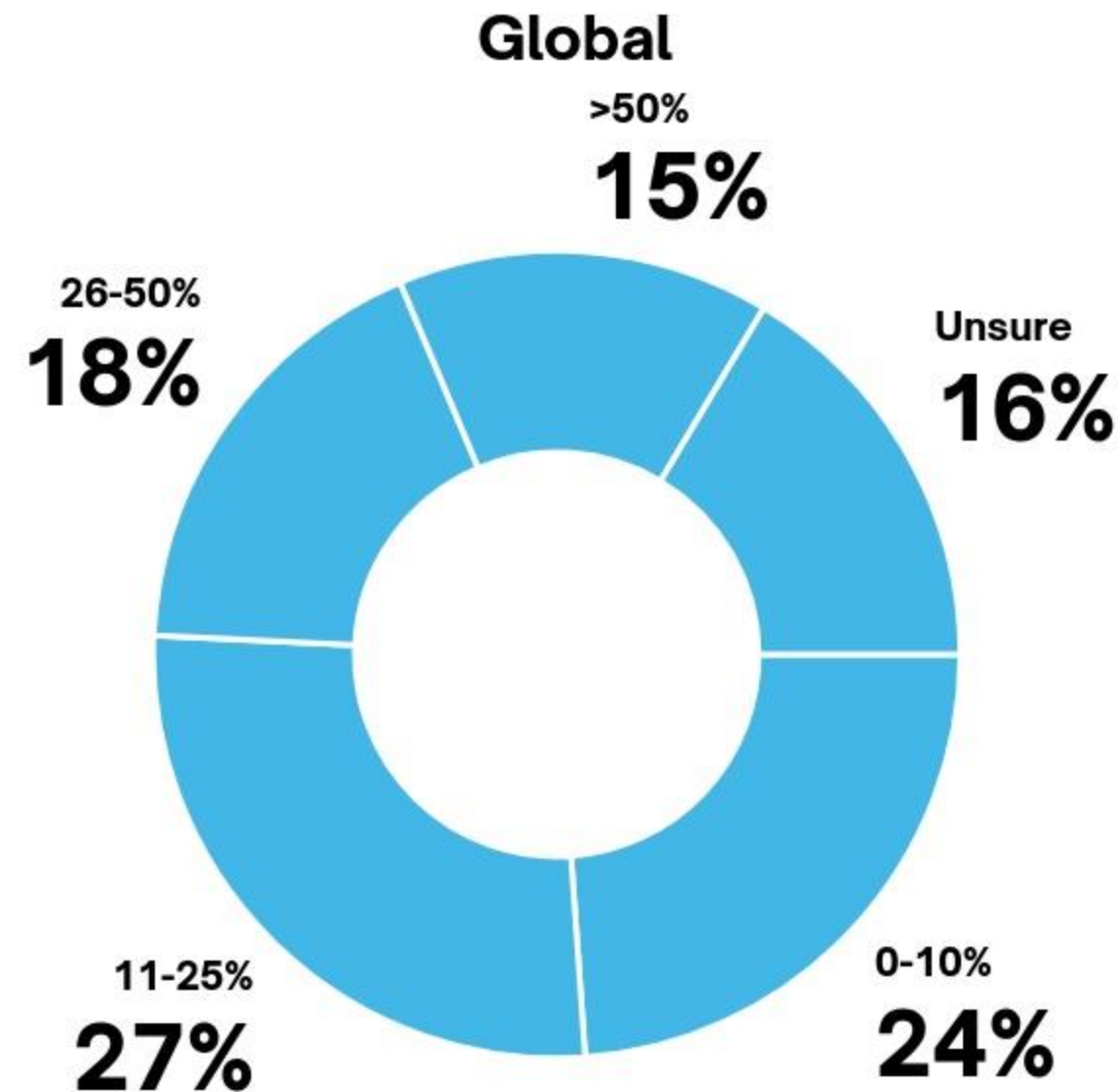


Over a third of sites report that at least 25% of their AR is greater than 90 days old globally, while a vast majority (63%) of ANZ sites report less than 25%



# Finance and Accounting (A/R) Finalization Timeline

Average percentage of A/R over 90 days



Over a third of sites report that at least 25% of their AR is greater than 90 days old globally, while a vast majority (63%) of ANZ sites report less than 25%



# Primary Reasons for Delayed Payments

Select up to 2

**Sponsor or CRO  
responsiveness**

**47%**

**Complex invoicing  
systems**

**36%**

**Internal tracking issues at  
my site**

**31%**

**Technology or platform  
problems with payor**

**25%**

*Similar to Global Data*



# Improving Payment Timeliness and Tracking

Select all that apply



**Dedicated staff/resources to accounts receivables (A/R) and payment management (67%)**

Same Globally



**Better internal tracking mechanisms (52%)**

Developing robust systems to monitor payment status and follow-up



**CTMS implementation and usage (33%)**

Leveraging CTMS to streamline payment tracking and management



**Clear communication of policy to Sponsors and CROs of escalation actions (14%)**

Proactively informing partners about payment policies and enforcement

**By implementing a combination of technology, dedicated resources, and clear communication, sites can significantly improve payment timeliness and tracking.**



Section 3

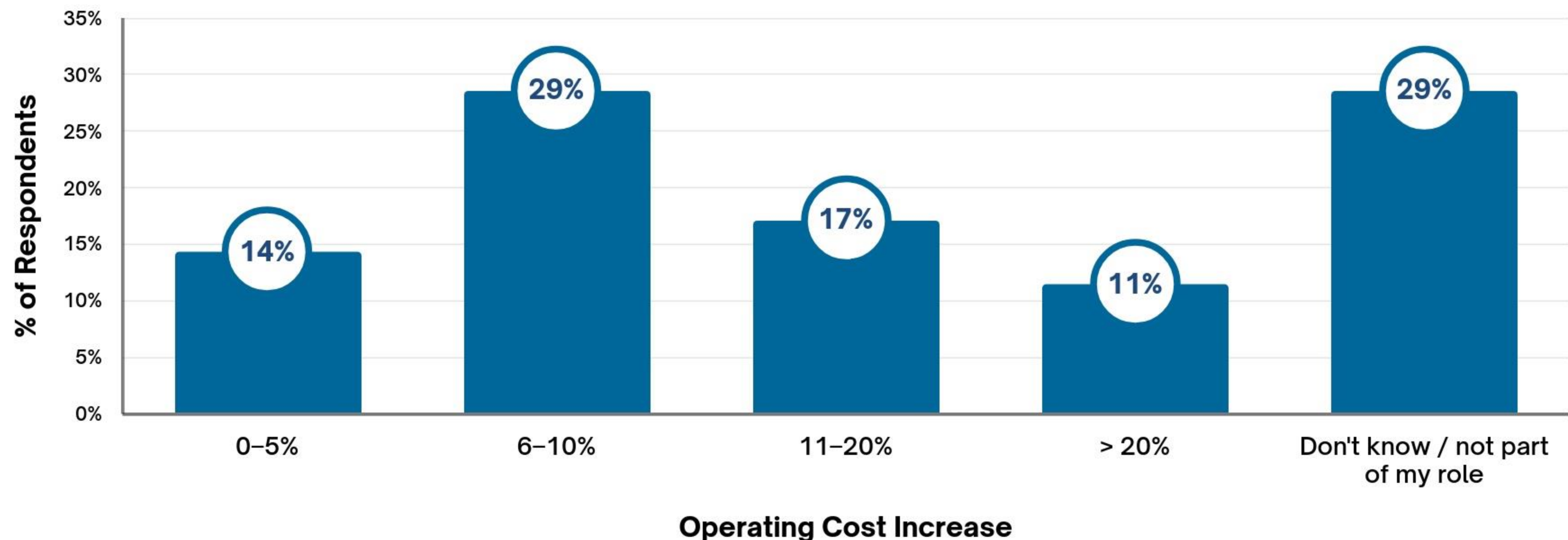
# Site Operations

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# Operating Cost Increase in 2024



The majority of respondents experienced an operating cost increase between 6-10% in 2024.



# Costs That Have Increased the Most

- 1 Salaries**  
ANZ - 80%
- 2 Regulatory Fees**  
ANZ - 24%  
Global - 15% (#4)

- 3 Technology**  
ANZ - 21%  
Global - 26% (#2)



# Costs That Have Increased the Most





# Changes That Helped Mitigate Rising Costs

**We HAVEN'T been able to mitigate rising costs**

**Staff Restructuring**

**Lowering % pay increases**

**Using AI and technology to create efficiencies**



# How Did Your Workforce Change In 2024?



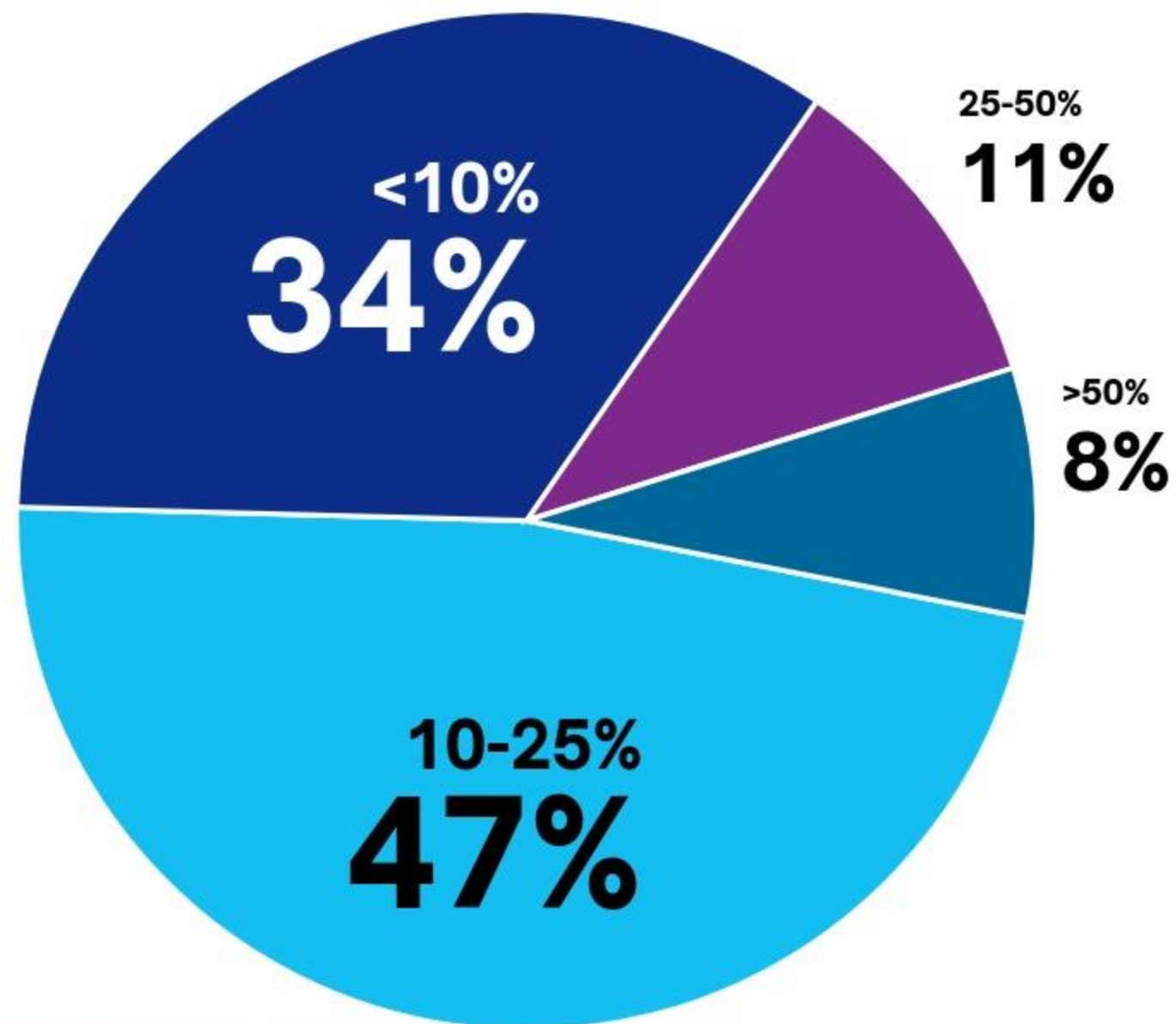
**The majority of sites experienced an increase in staff numbers in 2024.**



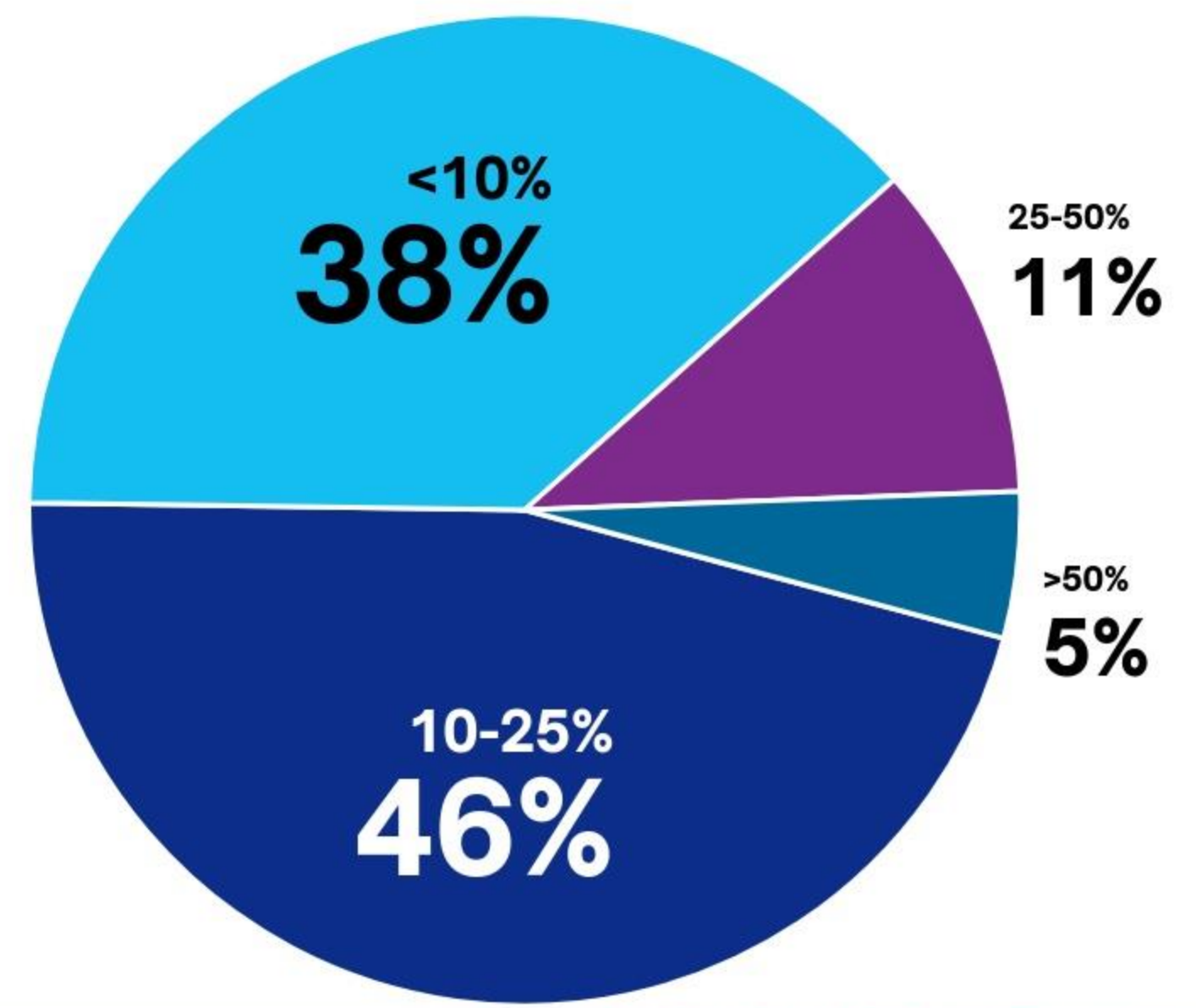
# Workforce Growth

Changes in 2024 Staff Numbers

ANZ



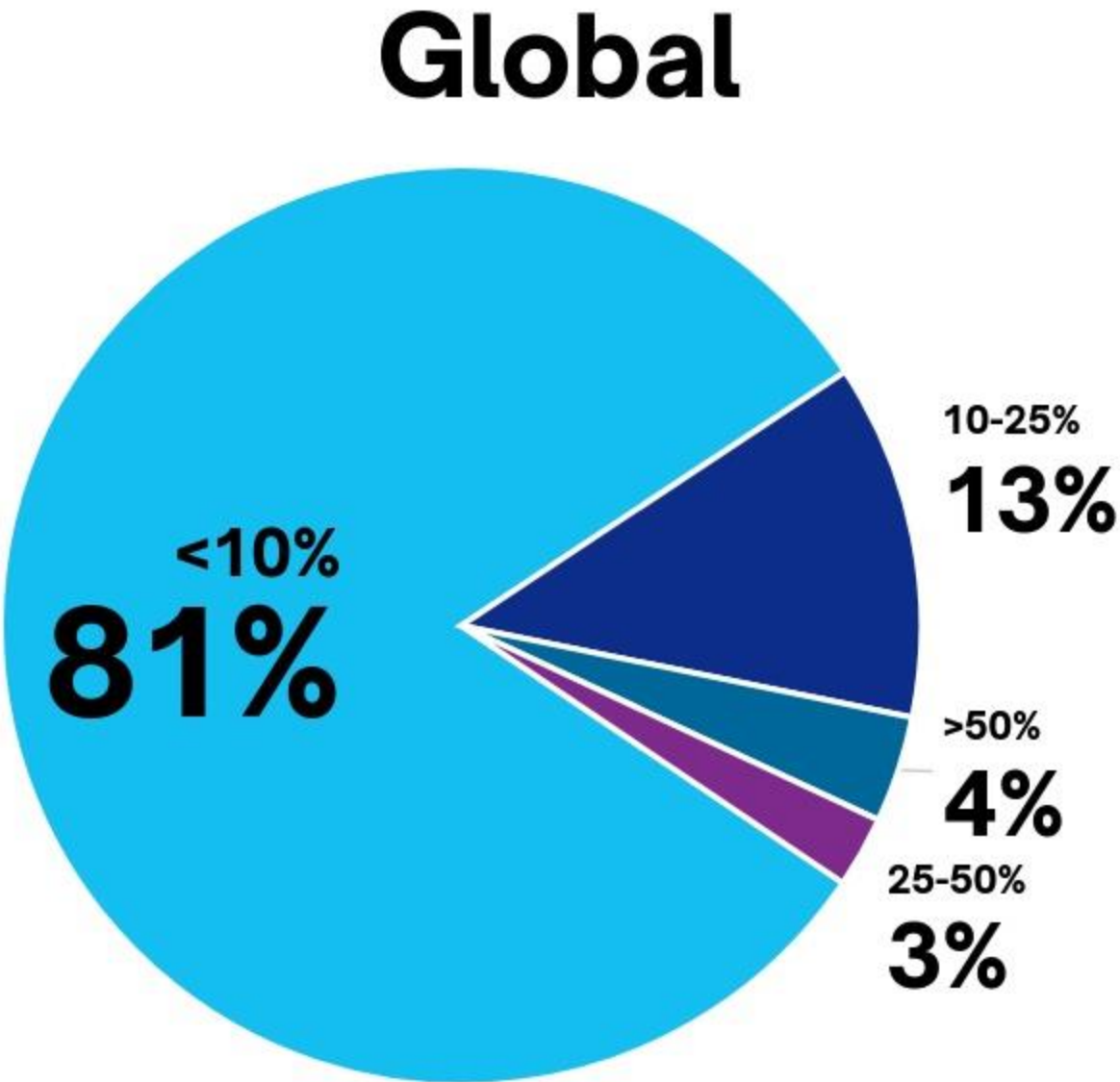
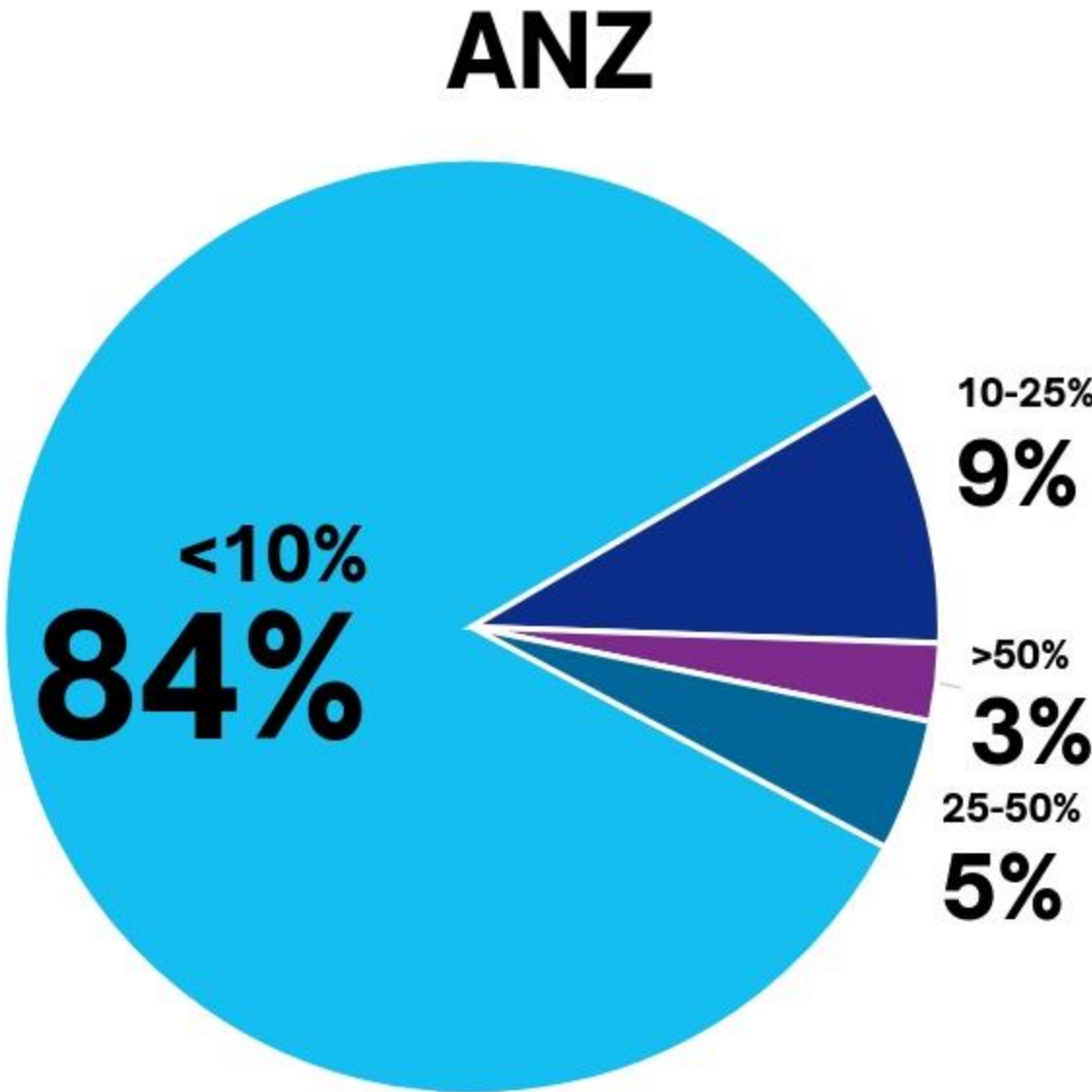
Global





# Workforce Decrease

Changes in 2024 Staff Numbers



Decrease was similar in ANZ compared to globally



# Challenges with Staff Retention

Choose up to 2

- **Career Progression ~ 40%**
- **Salary Competition ~ 35%**
- **No Problems - 22% ANZ**  
15% Globally
- **Burnout - 19%**
- **Training needs ~7%**
- **Remote Work Limitations - 4% ANZ**  
12% Globally



# Staff Retention Strategy with Greatest Impact





Section 4

# Industry Priorities & Collaboration

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# 2025 Site Priorities for Improvement

**1 Staff Training and Capacity Building - 55%**

**2 Faster Study Start-up - 41%**

**3 Patient Recruitment and Retention - 33%**

**4 Financial Management - 30%**



BUSINESS DEVELOPMENT  
TECHNOLOGY ADOPTION  
STAFFING  
PROCESS IMPROVEMENT  
TRAINING  
MARKETING  
EDUCATION  
RECRUITMENT TOOLS  
QUALITY MANAGEMENT  
DEDICATED TEAM  
HIRING  
CTMS ADOPTION  
TECHNOLOGY INTEGRATION



# Actions from Sponsors & CROs to Positively Impact Site Operations

Select up to 3

- 1 Reduce or eliminate redundant site training**  
Cut 25 in 2025 anyone?
- 2 Having a single point of contact for the site**
- 3 Increase recruitment budgets**
- 4 Simplify Protocols**
- 5 Increase recruitment budgets**
- 6 Improve the technology they required the site to use**



# Most Pressing Issues for the Industry in 2025

Select up to 3

Increasing protocol complexity

44%

Rising costs

41%

Staffing

32%

Technology more burdensome than helpful

30%



# Pressing Industry Issues: Anecdotal

## ANZ-Specific

**RGO Process Delays:** Research Governance Office timelines are "embarrassingly slow, inconsistent and unreliable" - taking >8 weeks and no longer running parallel to ethics review

**HREC Capacity Issues:** Human Research Ethics Committees are fully booked for months, adding significant delays to start-up and activation plans

**Australia's Competitive Position:** Rising costs exceed global fair market value benchmarks, making Australia less attractive for study placement

**ANZ Increased Demand:** With FDA uncertainty, more sponsors are looking to Australia/New Zealand, creating pressure on already stretched site capacity



# Pressing Industry Issues: *Anecdotal*

## Global Responses

**Protocol Complexity:** 20+ page assessment schedules, require additional resources, have too many endpoints, and increasingly restrictive Inc/Exc

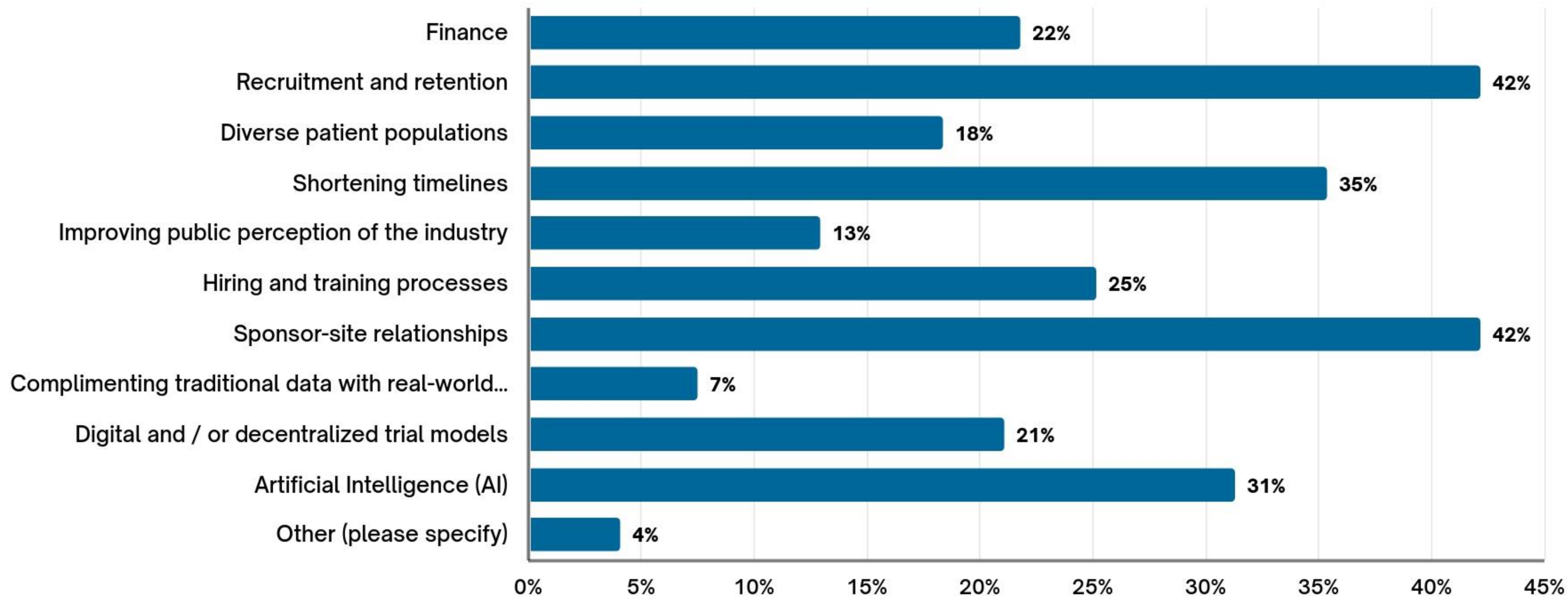
**Workforce:** High turnover rates, underpaid and undervalued, lack of professional recognition, risk aversion to the public health sector

**Recruitment and Retention:** Public trust erosion, increasing participant burden, advertising budgets continue to constrict

**Global Market Uncertainty:** pipeline disruption, significant delays and cancellations, biotech funding reluctance, geopolitical pressures

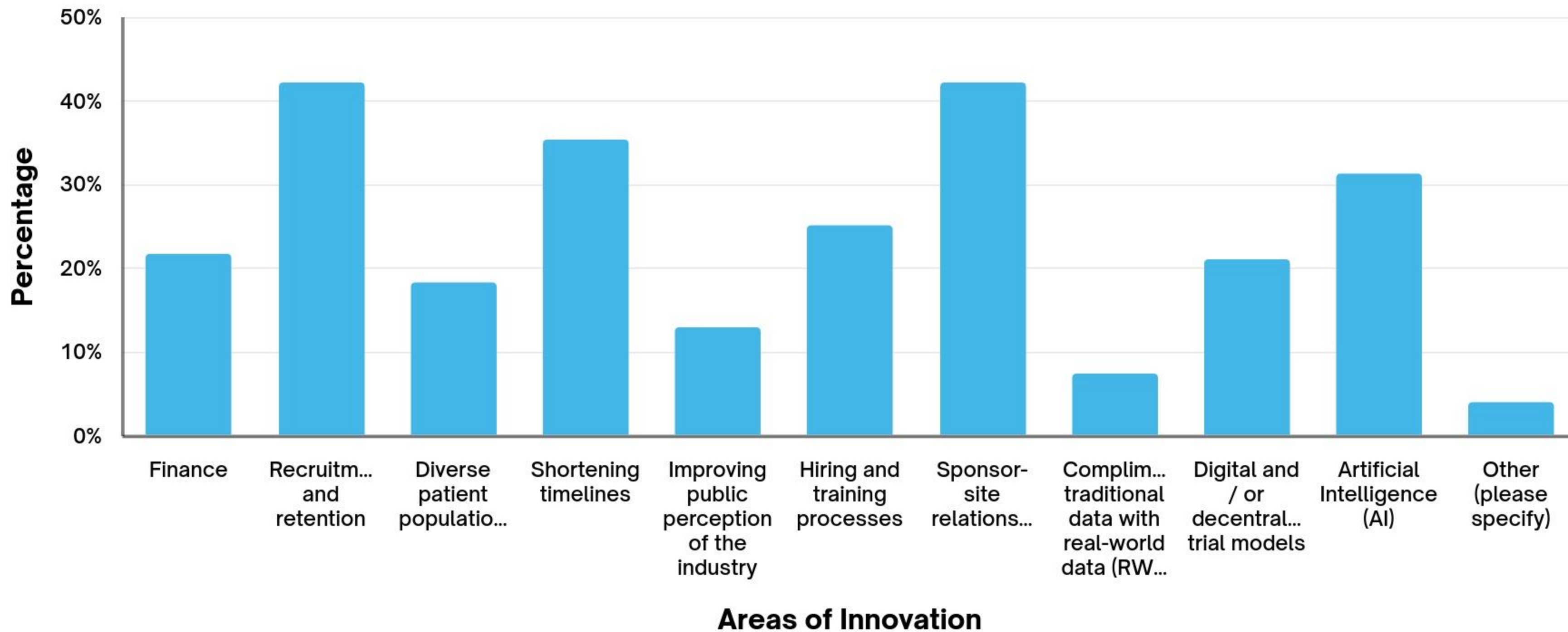


# Areas of Innovation Exploration





# Areas of Innovation Exploration

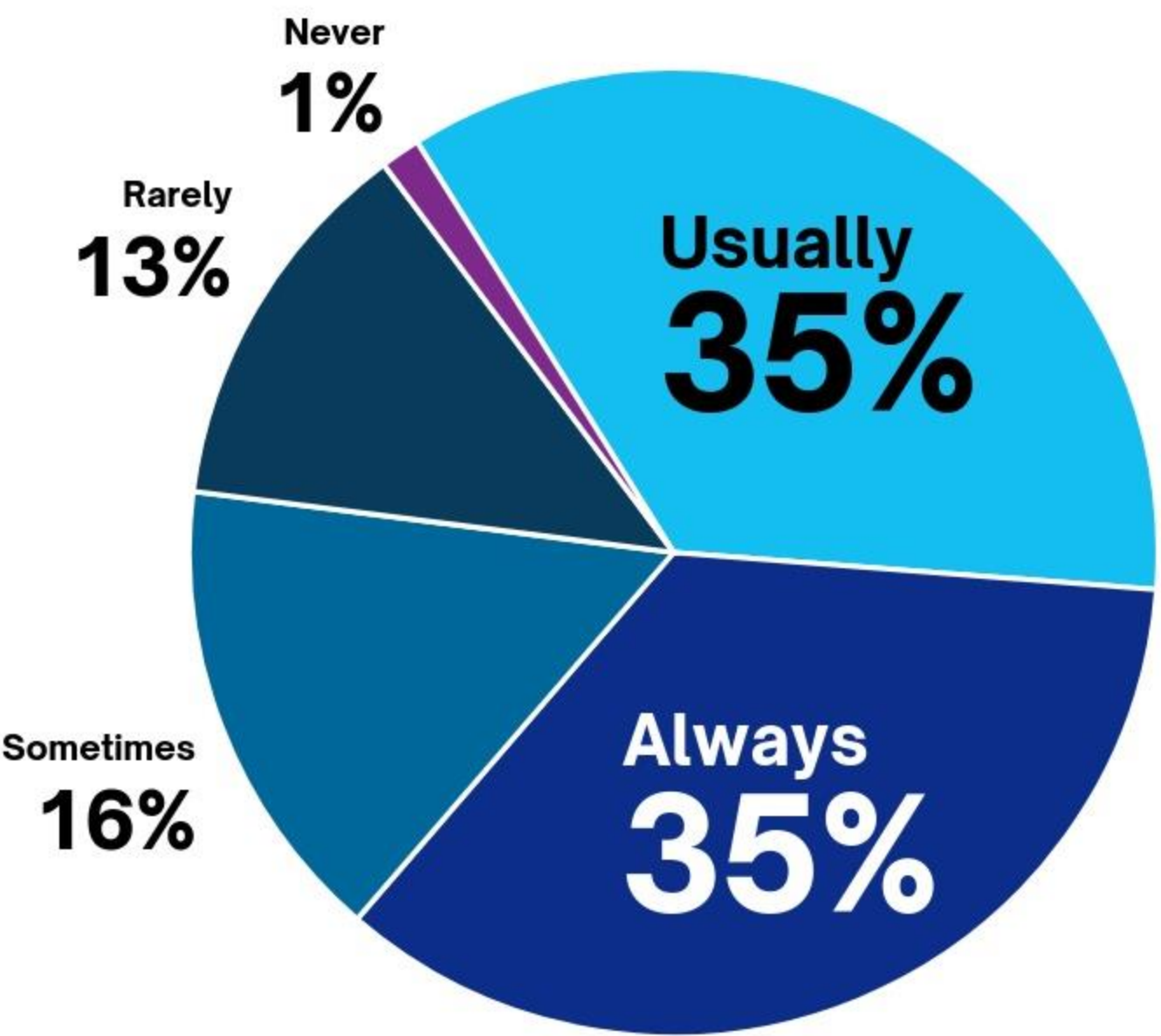




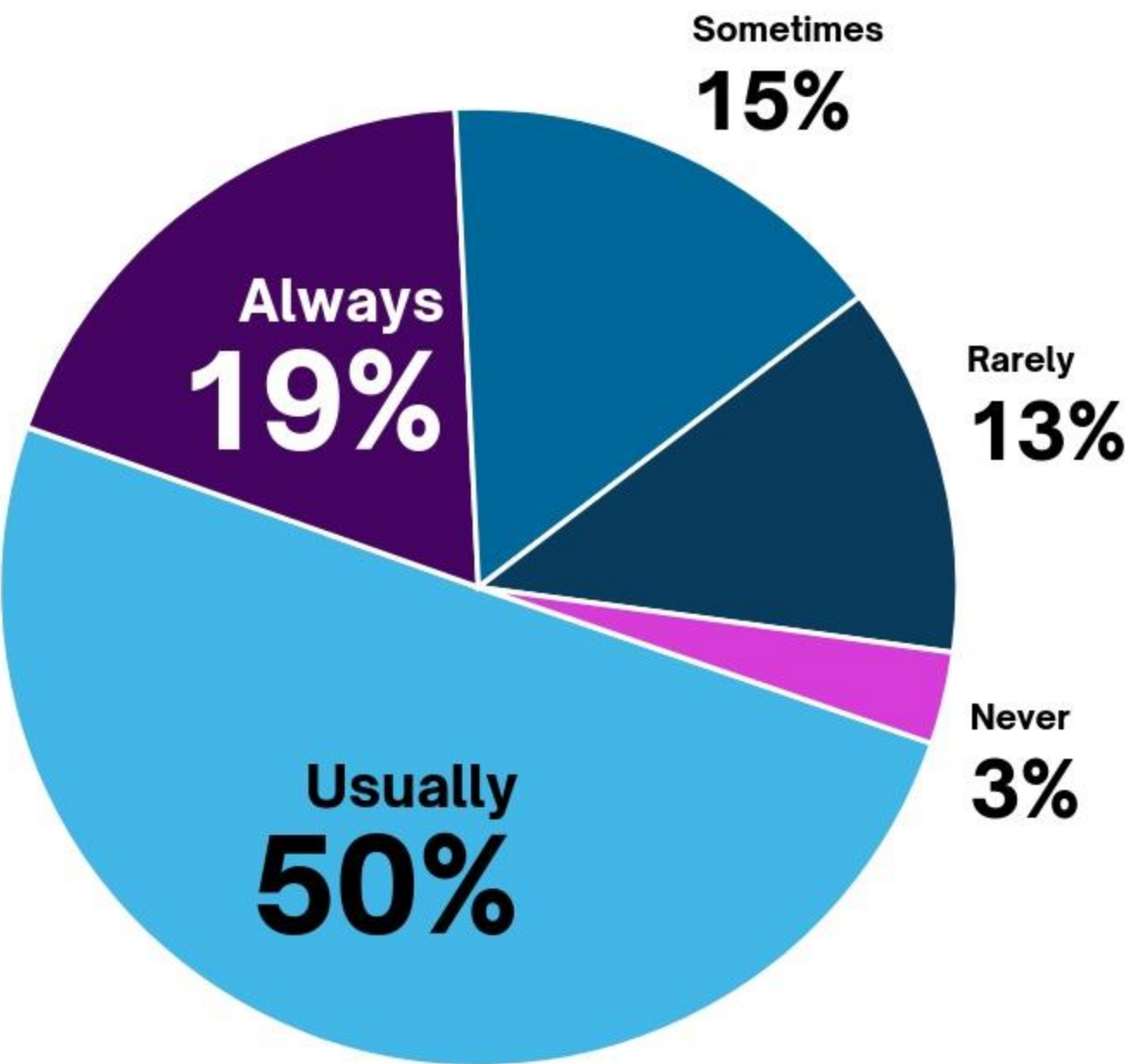
# Site Communication

Answered by Sponsors and CROs

## Single Point of Contact?



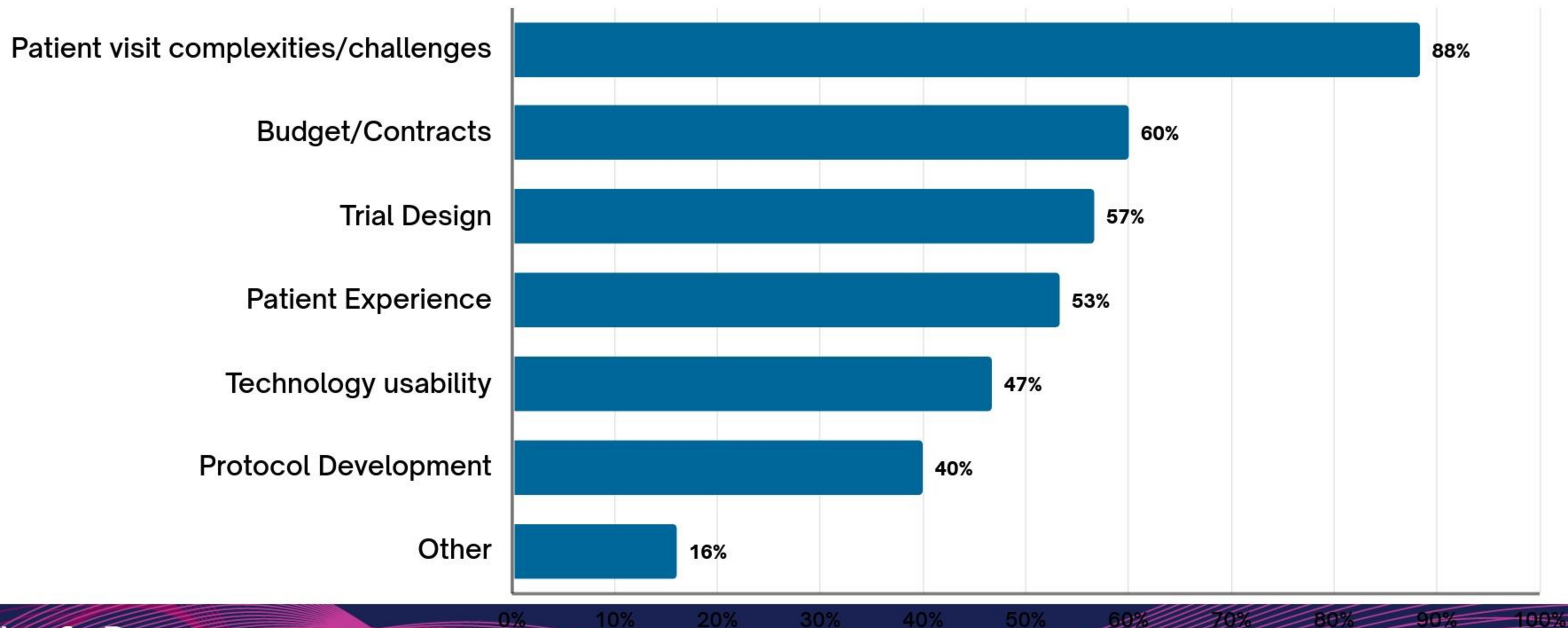
## Collect Feedback?





# Areas for Site Feedback Requested

Select all that apply



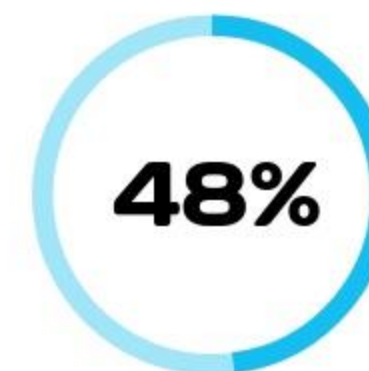


# Improving Site Collaboration Tools

Select all that apply



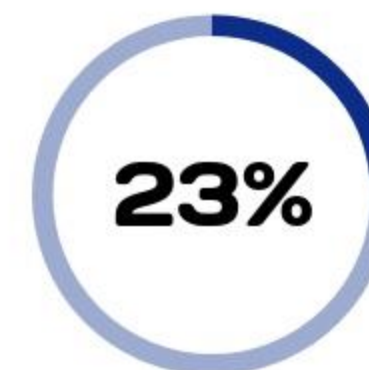
**Dedicated site  
relationship staff -  
74%**



**Hosting site  
meetings - 48%**



**Site visits - 71%**



**Participating in  
SCRS initiatives -  
23%**



**Attending  
conferences - 58%**



**Surveys - 16%**



**Open  
communication  
channels - 58%**



# Improving Site Collaboration Tools

Select all that apply

- **Dedicated site relationship staff - 74%**  
Assign staff to build and nurture relationships with individual sites
- **Site visits - 71%**  
Onsite visits to better understand site operations and identify areas for improvement
- **Attending conferences - 58%**  
Connect with sites in-person to foster collaboration and share best practices
- **Open communication channels - 58%**  
Enable easy, transparent communication between your team and sites
- **Hosting site meetings - 48%**  
Bring sites together to discuss challenges and solutions collaboratively
- **Participating in SCRS initiatives - 23%**  
Engage with the Site Consortium for Research Sites to align on industry-wide improvements
- **Surveys - 16%**  
Gather direct feedback from sites to understand their needs and pain points



