



SCRS WEST

Site Innovation Summit

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Innovation To Action Workshop: From Strategy To Execution

June 2, 2026

PARTNERING FOR SUCCESS



Innovation To Action Workshop: From Strategy to Execution



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SCRS



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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.

Kathy Mickel, SCRS

Casey Orvin, Alcanza Clinical Research



Criteria for Awarding Contact Hours



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.





Alex Rivera

Research Program Manager

7 years Clinical Research

18 Active Studies

3 Coordinators

Personal Background

- Age 42, married with two teenagers
- BS in Public Health, graduate certificate in Clinical Research
- Built this program from 2 to 18 active trials over 7 years
- Active ACRP member; passionate about practical innovation

Key Daily Pressures

- Recruitment timelines slipping on two active studies
- Staff stretched thin; coordinators managing 5-6 protocols each
- Institution is a slow adopter for advanced technology due to limited budget and human capital
- Competing for study awards against well-resourced sites

Professional Profile

- CCRC certified, 7 years at a site
- Manages 3 coordinators + part-time regulatory specialist
- Known for creative problem-solving and sponsor relationship management
- Serves a diverse community with amazing patient access

What Keeps Her Up At Night

- Missing enrollment targets and losing site reputation with sponsors
- Staff burnout from manual, time-intensive patient identification
- Falling behind competitors who are faster to adopt new tools
- Not having the data to prove research ROI to leadership

Research Program Manager Scenario



“You just won a competitive trial. The sponsor is offering a tool that could make or break your enrollment. There’s just one catch.”



THE STUDY

REACH-DM2 is a Type 2 Diabetes trial. Your site was 1 of 9 selected out of 31 identified sites.

Goal: enroll 12 patients in 4 months.



THE TOOL

PatientIQ is an AI platform that mines your patient database to identify eligible patients. Manual chart pull: 12+ hours. PatientIQ: ~2 hours.

The sponsor is offering free access for this trial specific query for their database. The platform works via a downloadable application to your system.



THE TIMELINE

You’ve been selected! SIV is in one month. First patient screened is due within 30 days.



THE CATCH

Typical technology-implementation review is 3+ weeks before any integrated technology solution can go live. Your team is already at capacity.

How Does This Play Out at YOUR Site?



Alex's scenario is your scenario — but how it plays out depends entirely on your site type, capacity, and definition of innovation. Use the questions below to explore your lens.



Academic Medical
Center/Hospital



Community-Based Site



Independent/Freestanding Site



Site Network

DISCUSSION POINTS:

- Who owns these decisions at your site — and how fast can they move?
- What would have to happen to get IT or leadership approval faster?
 - What are the specific steps required to clear the PatientIQ Portal for go-live, and who owns each step?
- If you can't get the tool live in time, what's your backup?

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**BE
PREPARED
TO SHARE!**



Sites



Sponsors



CROs



**Service
Providers**

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What We Hope You Gained



SITE

- Gain best practices from other sites
- Understand the nuances across other site types
 - Advocate in a collaborative way with other industry stakeholders

SPONSOR

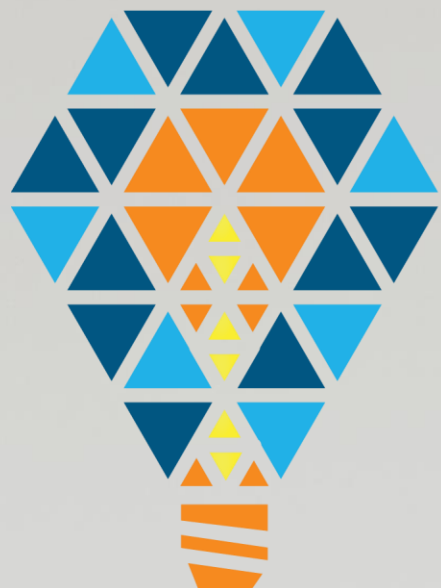
- Incorporate Voice of Site
- Understand how to build systems with that voice in mind
 - Gain valuable perspectives/feedback

CRO

- Incorporate Voice of Site
 - Understand the limitations of sites from different perspectives

SOLUTION PROVIDER

- Incorporate Voice of Site
- Answer the question- "Is their tech variable enough for the different site types?"



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