

STUDY	
PRINCIPAL INVESTIGATOR	
SITE	
RECRUITMENT PERIOD	
SITE TRIAL STAFF	

This template is intended for sites to use as a supportive tool to help draft a Recruitment Plan/ Strategy at the beginning of a study. It may need to be revised during the recruitment period.

Once completed the Recruitment Plan can be filed in the Investigator Site File (ISF) and will need to be monitored during the study recruitment phase.

It is a handy tool to provide sponsors at study start and to record site recruitment metrics and timelines.

Please adjust this template to meet your needs, this has been provided as a guidance document to get you started.

1 Expected Site Recruitment – Participant estimates

At Feasibility	
In CTRA (contract)	
Capped recruitment	
Competitive Recruitment (Site estimated target recruitment)	
At Site Initiation (SIV)	

2 Recruitment period per CTRA (contract)

Recruitment start date:	
Recruitment Completion date	

3 Expected recruitment rate

Per Month	
Rationale:	

4 Target population

Disease type	
Incidence in community	
Eligible for study (estimate)	

5 Barriers to Recruitment

e.g competing studies, visit schedule/travel required, resources to manage fielding enquiries

6 Enablers to facilitate Recruitment

e.g. dedicated recruitment officer, multiple advertising channels, clinician networks, outsourced recruitment options

7 Cost of Recruitment

Trial Recruitment Plan

e.g. cost of paid advertising, cost of in-house resourcing, outsourced options, clinician referral remuneration

Accounted in Study Budget	
Personnel	
Administrative	
Advertising	

8 Alternate Recruitment Strategies (if relevant)

9 Involvement of third party vendors / applications

Name of vendor	Key Capabilities	Request for Proposal	Estimated budget	Accepted proposal
	Website	N		
Recruitment Agency ABC	Apps	Y		Y
	Social Media			Y
	Registries			
	Print Media			
	Paid Digital Media			
PR Agency 123	PR	Y		

10 Pre Screening Plan

11 Remuneration for recruitment activities (from CTRA).

12 Screen failure considerations

Recruitment strategy sign off

DOCUMENT VERSION	
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