



# Beyond Metrics: Hidden Drivers of Site Success

## Rapid Site Health Check

**Purpose:** Assess whether site culture, leadership, and workforce design are enabling recruitment, data quality, and patient retention.

**How to use:** *Score each statement 1–5 (1 = Not true / 5 = Always true)*

### 1. Culture & Leadership

| ITEM                                     | SCORE (1–5) | SECTION TOTAL |
|------------------------------------------|-------------|---------------|
| Issues are raised early without blame    |             |               |
| Roles are clear during high workload     |             |               |
| Investigators are accessible and engaged |             |               |
| Team understands the purpose of studies  |             |               |
| Communication is proactive               |             | /25           |

### 2. Workforce & Capability

| ITEM                                          | SCORE (1–5) | SECTION TOTAL |
|-----------------------------------------------|-------------|---------------|
| Workload is realistic and well distributed    |             |               |
| Training is structured (not ad hoc)           |             |               |
| Capacity is assessed before taking on studies |             |               |
| No reliance on single individuals             |             |               |
| New staff become effective quickly            |             | /25           |

### 3. Operational Reality (vs. 'On Paper')

| ITEM                                      | SCORE (1–5) | SECTION TOTAL |
|-------------------------------------------|-------------|---------------|
| Feasibility reflects true capacity        |             |               |
| Startup timelines are consistently met    |             |               |
| Issues are escalated early                |             |               |
| Recruitment reflects real patient access  |             |               |
| Competing priorities are actively managed |             | /25           |



#### 4. Patient-Centric Delivery

| ITEM                                        | SCORE (1-5) | SECTION TOTAL |
|---------------------------------------------|-------------|---------------|
| Patients experience continuity of care      |             |               |
| Staff communicate confidently and clearly   |             |               |
| Retention strategies are proactive          |             |               |
| Patient burden is actively managed          |             |               |
| Team adapts quickly when patients disengage |             | /25           |

**TOTAL SCORE**

**/100**

#### Turn Your New Insight Into Site Action

**Lowest scoring area:**

**What's driving it:**

**One action this week:**

**Site Reflection:** *If you removed all metrics, what would still tell you that you are a high-performing site?*

**Key Takeaway:** Metrics tell you what happened. Culture, leadership, and workforce tell you what happens next.