RESEARCH PROJECT LIFECYCLE

Delivery Tracking and Regular Review

Stage: Pilot Test Phase and Main Experimental Delivery · Previous template: Gate 3 Readiness and Project Sign-Off, or the Light-Touch Trial Protocol · Next template: Research Outcomes Report

How to use this form

Use this form at **every delivery review**, from the first day of the pilot to the end of follow-up. It is **one page**, completed each time. It shows whether the study is being delivered as planned, so problems are spotted and fixed early, not discovered at the end.

- **Who completes it:** the Delivery Lead, with the Project Lead. The Research Lead joins when there is an interim analysis or a decision about the plan.
- **How often:** as set in the Experimental Planning Document, for example fortnightly. Keep every completed review: together they form the delivery record checked at Gate 4.
- **Compare with the plan.** Each section compares what happened with what was planned: cases against target, delivery against the acceptable level, and responses against the target rate.
- **At the end of the pilot,** use section G2 to decide whether to go ahead, adjust or stop.
- **Do not look at outcome results** in these reviews, unless an interim analysis was planned in advance. Looking early can change decisions and bias the study.
- **Questionnaires, interviews or secondary data:** complete sections A, B, D, E and G. Mark the trial-only questions "Not applicable".

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A. This review

Field	Your answer
A1. Project title *(essential)* As on the Full Research Plan or Light-Touch Trial Protocol.	
A2. Project reference From the Research Portfolio Register.	
A3. Review number *(essential)* For example, review 4.	

Field	Your answer
A4. Stage *(essential)* Pick one.	☐ Pilot ☐ Main delivery ☐ Follow-up only
A5. Period covered from *(essential)*	Date: ____ / ____ / _____
A6. Period covered to *(essential)*	Date: ____ / ____ / _____
A7. Review date *(essential)*	Date: ____ / ____ / _____
A8. Attendees Names and roles.	

B. Recruitment

Field	Your answer
B1. Cases identified and referred *(essential)* The number this period and in total.	
B2. Cases allocated against target *(essential)* The number allocated so far, the target, and the percentage of the target reached. For other designs: the number of people or records included so far.	
B3. Recruitment status *(essential)* Pick one, then explain.	☐ On track ☐ Behind target ☐ Ahead of target **Notes:**

Field	Your answer
B4. If behind: why, and what will change *(essential)* Is the way cases are identified still finding the right cases? Write "Not applicable" if recruitment is on track. Slow recruitment reduces power and delays the findings, so act early.	

C. Delivery in every group

Trials and quasi-experiments only. Compare each group with the acceptable delivery level set in the plan.

Field	Your answer
C1. Delivery in each treatment group *(essential)* The share of people who received the treatment as planned, against the acceptable level.	
C2. What the control group received *(essential)* Confirm the control group received what was intended, such as business as usual.	
C3. Crossover *(essential)* The number of cases that received the treatment meant for another group, and why.	
C4. Delivery status *(essential)* Pick one, then explain.	☐ Green: on track ☐ Amber: needs attention ☐ Red: action needed now **Notes:**
C5. Has practice at control sites changed? *(essential)* For example: control sites copying parts of the treatment, or changing how they work because they know about the trial. Pick one, then explain.	☐ No change seen ☐ Some change ☐ Significant change ☐ Not applicable **Notes:**

Field	Your answer
C6. Has anyone learnt something they should not know? For example: a person who should not know the group allocation has found it out. Say what happened and what you have done.	☐ No ☐ Yes **Notes:**

D. Data and responses

Field	Your answer
D1. Dropout and withdrawals *(essential)* The number in each group this period and in total, and the main reasons.	
D2. Response rate in each group If any data is collected by questionnaire: the response rate in each group against the target. Similar rates in every group keep the comparison fair. Write "Not applicable" if no questionnaire is used.	
D3. Data quality Any missing, late or incorrect data, and what is being done about it.	

E. Changes, issues and actions

Field	Your answer
E1. Differences from the plan *(essential)* Anything that has not happened as planned: what, why, and the likely effect on the study. Write "None" if there are none.	
E2. Does the plan need an amendment? *(essential)* Pick one. Every amendment is dated, versioned and recorded with the reason.	☐ No ☐ Yes: Experimental Planning Document ☐ Yes: Full Research Plan or protocol ☐ Yes: both

Field	Your answer
E3. Issues and actions *(essential)* Each action: what will be done, who will do it, and by when. Include actions still open from the last review.	
E4. Staff and partner changes For example: new staff who need briefing, or a change in a partner organisation.	

F. Interim analysis

Only if an interim analysis was planned in advance for this point.

Field	Your answer
F1. Interim analysis due this period *(essential)* Pick one.	☐ No ☐ Yes
F2. Result and stopping rule What the interim analysis showed, and whether the stopping rule was met. Completed by the Research Lead.	

G. Decision

Field	Your answer
G1. Overall status *(essential)* Pick one.	☐ Green: on track ☐ Amber: needs attention ☐ Red: action needed now
G2. End of pilot only: go, adjust or stop Pick one, using the criteria in the Experimental Planning Document. Leave blank for regular reviews.	☐ Go: start main delivery ☐ Adjust: make changes, then go ☐ Stop

Field	Your answer
G3. Is the research complete? *(essential)* Pick one.	☐ No: continue ☐ Recruitment complete, follow-up continues ☐ Yes: move to Final Analysis
G4. Escalate to the Sponsor? *(essential)* Pick one, then say what the Sponsor needs to know or decide.	☐ No ☐ Yes **Notes:**
G5. Next review *(essential)*	Date: ____ / ____ / _____
G6. Completed by *(essential)* Delivery Lead name, and the Project Lead who agreed it.	
G7. Date completed *(essential)*	Date: ____ / ____ / _____

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