SOCRA Project/Program Management Workshop

November 12-13, 2026 | Nashville, Tennessee

DAY ONE - THURSDAY, NOVEMBER 12

8:00-8:30 AM	**Registration and Continental Breakfast**
8:30-10:15 AM	**Building An Infrastructure and Foundations for Success in Project and Program Management** *Nancy Wintering, LCSW, CCRP, Assistant Director of Research, Thomas Jefferson University* *Daniel Redline, BA, CCRP, Senior Director, Clinical Operations, Calyxo, Inc.* This session introduces key considerations in program and project development, including strategic and tactical planning, stakeholder engagement, cross-functional team management, and methods for measuring progress and evaluating project performance.
10:15-10:30 AM	**Break**
10:30 AM-12:00 PM	**Project Management in Clinical Trials: Introduction to PMI Principles** *Radhika Sivaramakrishna, PhD, PMP, CSSBB, CCRP, Clinical Operations and Project Management Consultant* This session introduces Project Management Institute (PMI) project management principles as applied to clinical trials. Topics include PMI history, key terminology, the project life cycle, and core knowledge areas. The session also explores the challenges of managing global clinical projects across time zones and cultures, highlighting practical strategies for effective virtual project management, supported by real-world examples.
12:00-12:45 PM	**Lunch (Provided)**
12:45-2:45 PM	**Project Management Organization: Charts, Planning & Tracking, Tools & Techniques** *Nancy Wintering, LCSW, CCRP, Assistant Director of Research, Thomas Jefferson University* Staying on track is a key to success in project management. This interactive session focuses on tools and techniques for effective project planning, progress tracking, and project assessment. Topics include Gantt charts, standard operating procedures (SOPs), file naming conventions, flowcharts, shared calendars, apps, and AI tools that support organization, collaboration, and workplace management.
2:45-3:00 PM	**Break**

3:00-4:30 PM	**Project Management in Clinical Trials: Project Management Knowledge Areas and Process Group Mapping** *Radhika Sivaramakrishna, PhD, PMP, CSSBB, CCRP, Clinical Operations and Project Management Consultant* This session will introduce participants to project management principles following PMI (Project Management Institute) guidelines as well as project management knowledge areas and process group mapping. Project management tools will be provided and discussed. Situational examples will be provided in order to maximize interaction and discussion.
4:30-5:00 PM	**Faculty Panel Q&A and Day 1 Wrap-Up** *All Faculty*

DAY TWO - FRIDAY, NOVEMBER 13

8:00-8:30 AM	**Continental Breakfast**
8:30-10:15 AM	**Creating a Study Budget and Managing Finances From Start Up to Close Out** *Lisa Benson, BS, CRCP, CEO & President, Pediatric Clinical Research Consultant, LLC.* This session examines the financial and operational components of the clinical trial lifecycle, from study start-up through closeout. Topics include feasibility assessment, budget development, staffing, contract negotiations, study implementation, team communication, and strategies for maintaining compliance and operational success throughout the study. Ms. Benson will provide practical tools and processes for effective study management will be discussed.
10:15-10:30 AM	**Break**
10:30 AM-12:00 PM	**Project Management in Clinical Trials: Risk Management and Risk Mitigation** *Radhika Sivaramakrishna, PhD, PMP, CSSBB, CCRP, Clinical Operations and Project Management Consultant* *Daniel Redline, BA, CCRP, Senior Director, Clinical Operations, Calyxo, Inc.* This interactive session will introduce basic principles of risk management, risk avoidance and risk mitigation. Project management tools will be provided and discussed. Situational examples will be provided in order to maximize interaction and discussion. Project management knowledge areas will be summarized.
12:00-12:45 PM	**Lunch (Provided)**
12:45-2:45 PM	**Contract Development for Good Outcomes for Site and Sponsor** *Lisa Benson, BS, CRCP, CEO & President, Pediatric Clinical Research Consultant, LLC* Ms. Benson will discuss the contract review process and the importance of effective collaboration among sponsors, CROs, and sites when negotiating Clinical Trial Agreements. The session will cover key agreement terms, with a particular focus on study budgets and payment terms, and facilitate discussion of common challenges from both sponsor and site perspectives. Additional topics include intellectual property, monitoring visits, audits, subject injury, and the use of tracking tools for effective contract management. Attendees will participate in interactive exercises and receive practical examples and tools.

2:45-3:00 PM	**Break**
3:00-4:30 PM	**Organizational Dynamics in Project Management: Different Styles, Different Expectations** *Nancy Wintering, LCSW, CCRP, Assistant Director of Research, Thomas Jefferson University* This interactive session includes strategies and self-assessment tools to identify challenges and succeed among the many challenges in Project Management. Psychological issues may arise unexpectedly that have an impact on the activities and relationships in project management. This session is designed to build competencies to manage more effectively while working with different leadership and organizational styles. Ms. Wintering will present strategies to recognize and resolve conflict proactively and to promote effective team building.
4:30-4:45 PM	**Q&A and Conference Wrap-Up** *All Faculty*