Table 18. Tips for Site Coordinator Professionalism (Attachment V)

Site Coordinator Infrastructure Activity	Tips for Professionalism
In-Person Engagement	● Appear well-organized, neat and tidy. Consider appropriate dress expectations for the type of meeting/situation/interaction and anticipated audience. Assure preparedness with writing utensils, and spaces for notes. This establishes a thoughtful approach to your meeting and your audience can expect quality work from 1st Five staff. ● Lead with curiosity to learn more about your partners, their needs, and opportunities for collaboration. ● Lead with positivity about the benefits and strengths of a partnership with 1st Five. ● Articulate the purpose of 1st Five, the benefits of developmental screening in primary care, and the importance of early identification through standardized universal developmental screening protocols. ● Make sure that the use of technology is essential, not a distraction (turn down cell phones, or turn off). ● The Site Coordinator should be able to run needed technology with minimal technology issues/challenges. ● In-person meetings may benefit from paper copies of discussed materials. Consider handouts and sample copies of 1st Five materials like a sample completed 1st Five Referral Form, and sample completed ASQ screening. Partners can keep this material and refer to it in the future. ● In-person meetings may benefit from an attendance or sign-in sheet. The sign in sheet can be used to track attendance and collect contact information for partners so that the Site Coordinator may connect with attendees to provide ongoing support in the future. ● Resist talking over partners, and avoid interrupting partners. Site Coordinators are great listeners and should seek to understand as the basis for understanding partner needs and challenges relative to screening implementation and referral questions.
Virtual Engagement	● Confirm that attendees have access to the virtual platform being considered for the activity. Consider offering alternatives if one platform doesn't work best for all who plan to attend. ● Confirm virtual access to the activity by preparing attendees with technology expectations ahead of the meeting. This includes confirmation of the need for internal video (camera), and access to a microphone or call-in capabilities. ● Make sure you know how to run the meeting/activity using the necessary technology and be able to answer questions to assist attendees if they have technological difficulties during the activity. ● Determine if you will be recording the activity. Generally, recordings are appropriate if the Site Coordinator intends to make the

	information available later to attendees or those that may have schedule conflicts (educational training for example). If so, this should be made known prior to beginning recording so attendees are aware. If there is a question-and-answer session you should consider whether recording will discourage participants from asking questions. ● Be early to the virtual activity to greet incoming attendees and take virtual attendance. Consider requesting that attendees enter their names and email addresses in the comment/chat box to make saving this information easier (various virtual platforms will save chat comments when meetings are recorded). Refer to your virtual platform for these details. ● Project a neat appearance and encourage attendees to engage with you by turning their camera on. ● Encourage questions and curiosity about the implementation of developmental screening and the 1st Five referral process into their clinic. ● Describe follow up to the virtual event as a component of wrapping up the activity. Attendees should know what to expect as next steps.
Email Engagement	● Review email content prior to sending for spelling and/or grammatical errors. ● Review email attachments prior to sending for appropriate uploads. ● Review who you are replying to, or sending your email to. Be careful with "reply-all" and make sure your emails are appropriately targeted. ● Avoid distracting email fonts, text colors, or backgrounds for email content. Instead, strive to be simple and clear. ● Be sure your email has a signature line where your email address, phone number and fax number is visible in every correspondence. ● If you are away from your office, make sure you set your "out of office" or "away" message to redirect questions or set expectations for responding to your contacts.
Phone Engagement	● If you are away from your office, make sure to also review voicemail prompts for updated voicemail messages for callers. ● Assure that voicemail mailboxes are able to receive messages and are not full.