

## The Patterson Foundation's Project/Program Framework

**Name of Project/Program:** The Patterson Foundation's Event Excellence Ideation Squad

**Time Frame:** November 2023 - Ongoing

**Initiative:** N/A

### **Brief description of the project/program and significance to The Patterson Foundation and associated Initiative:**

The Patterson Foundation (TPF) holds events, gatherings, and meetings in-person and virtually to connect, learn, and share with individuals, organizations, and communities. Through each of these opportunities to connect, TPF strives for excellence.

To TPF, striving for excellence does not mean perfect, as rarely things in life are perfect. Instead, TPFers strive to ensure everything, big or small, is done with responsibility, intentionality, and joyful stewardship.

TPF fosters a collaborative work culture with many talented staff, passionate engagement team members, and expert consultants. Comprehensive communications and strategies are needed to ensure events are planned and prepared with detailed excellence.

With this in mind, TPF's Event Excellence Ideation Squad was started. The group includes Kellie Alexander (Project Manager), Kelli Karen Smith, Karen Windon, and Kiarra Louis with oversight from Debra Jacobs.

### **Aspirations and Objectives:**

1. Create and evaluate several documents that will ensure event excellence and be used to create consistency across all initiatives, including best practices for requesting items from TPF Support Staff.
2. Ensure documents have an implementation strategy for current TPFers to use efficiently and effectively.
3. Craft a TPF Excellence Orientation Strategy for New TPFers with follow-up of details and resources.

### **TPF Team Members working on this project/program:**

- Debra Jacobs, Project Oversight
  - Final approval on all documents and planning
- Kellie Alexander, Project Manager

- Manages process of material creation and evaluation
- Creates and shares documents and communication about process
- Kiarra Louis, Project Lead Assistance and Orientation Manager
  - Assist with creation of all materials and edits
  - Managers orientation and implementation timeline
- Kelli Karen Smith, Project Assistance
  - Assist with material creation and edits
  - Provides TPF Event Excellence insight
- Karen Windon,
  - Assist with material creation and edits
  - Provides TPF Event Excellence insight
  - description of role

## **Overview of How It Works:**

### **Phases**

- **Phase 1: Brainstorming and Development** — High level thinking of TPF Excellence and how information should be shared and implemented, evaluation of event best practices, creation of materials done by Kellie Alexander, Kelli Karen Smith, Karen Windon, and Kiarra Louis complete by November 30th.
- **Phase 2: Internal Staff Review** — TPF's Internal Staff including Debra Jacobs, Nancy Henry, Stacey Gadeken, Stacy Sternberg, Beth Duda, and Fellows, review the Event Excellence Document and provide edits by December 22nd.  
Draft documents for use in planning January Book Circle Events (Beth and Fellows) to inform what is missing.
- **Phase 3: Test and Learning Opportunity** — Event Excellence materials are tested for the January Gregg/Ryan Book Circle Events. Learnings are reported back to Kellie Alexander by January 30th.
- **Phase 4: Evaluation and Implementation** — Ideation Squad meets again with findings from the January event and used to edit materials for future use. Implementation plan is developed.
- **Phase 5: 2024 Implementation and Orientation Strategies** — Using finalized materials, Ideation Squad will craft an Implementation Strategy for current TPFers and an Orientation Strategy for incoming TPFers.

### **Event Excellence Materials to be Developed:**

- 1) Toolkit with narratives and links
- 2) Templates for Materials:
- 3) Implementation and Orientation Strategy

**Engagement:**

- Number of Participants/Beneficiaries: TPFers
- Number of Vendors: N/A
- Number of Targeted Partners: N/A

While an internal document, this will be implemented across all TPF initiatives for widespread impact across all events.

**Outputs & Outcomes:**

Success will be seen when TPFers implement the event materials into practice when preparing for events. Outcomes will consist of TPF excellent event preparation and execution meaning cushion time will not become slim and all parties involved will feel comfortable with their responsibilities.

**Communications and Marketing:**

- Morning missive: Week of Feb. 19th or 26th
  - Invitation to Orientation Zoom with Kellie and Kiarra in March
- Blog post from Kellie A. after

No social media or marketing needed.

**Budget:**

N/A