The Beginnings of our Project Charter

Creating an Age-Friendly Communities Network in Western Australia

Results of the First Scoping Forum
Held July 12th 2013

COTA
For older Australians

City of Melville

WALGA

Government of **Western Australia**
Department of **Local Government and Communities**

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1. Introduction

On July 12th 2012, the Council on the Ageing (COTA), in partnership with the Western Australian Local Government Association (WALGA), the Department of Local Government and Communities (DLGC) and the City of Melville (CoM) hosted a forum for local government officers who are currently involved, or are interested in becoming involved in, planning for age-friendly communities (AFC). The Forum was designed to explore the idea of establishing an ongoing Age-Friendly Communities Network (AFCN) to share information and ideas, and to provide a networking avenue for these people. The hope was, that by generating ideas for small, manageable initiatives, the interest in and desire for age-friendly communities would grow and prosper across WA.

The partners involved in organising the forum established a Working Group to ensure that the process and methods used would be relevant and appropriate for all. The members of this Working Group were:

- Chris Jeffrey, COTA
- Christine Young, CoM
- Robyn Teede, DLGC (Communities)
- Troy Daniels, DLGC (Local Government)
- Jodie Holbrook, WALGA

Ken Marston and Phil Airey (COTA) were also involved in the detailed planning and hosting of the forum, along with several COTA volunteers.

I, (Rebecca Cotton) facilitated the forum. I have produced this document using the results of the forum to help you (the forum participants) appreciate what it would take to establish the AFCN, so you can understand what it would mean for your organisations and your partnerships.

1.1 Why the language is deliberately informal

As a text to assist you with further planning, the style of this document is rather unusual. I have written it in an informal way because I want you to feel as if I am speaking directly to you. I want you to be interested in the content and know that it has everything to do with you, no matter where you sit within the age-friendly communities stakeholder community (which is extensive). I have attempted to weave a common thread through the entire document that brings you to a point where you will feel excited to participate in the next planning process.

1.1.1 About the use of pronouns

In case you haven't realised it yet, "I" refers to me and "you" and "your" are plural pronouns for all the people who were at the forum. That means you. "Us", "we" and "our" means all of us together.

1.2 Why this forum is now named the "First Scoping Forum"

When you received your invitation to attend the forum, it wasn't given an official name as such, but was tagged with the question, *"Does Western Australia need an age-friendly communities network?"*. To answer this question, we needed to work out what such a network would do for its members, and what would be required in setting it up and managing it. What we were looking at was a potentially complex project that would need careful project management to be successful. In the language of project management, what we needed to do was 'to scope' the question. As a verb, "to scope" means, *"to look at, read or investigate, as in order to evaluate or appreciate."*[1] *Scoping a project* is a normal part of project initiation, which is one of five distinct processes that a project will move through when managed properly[2]. When you scope a project, you work out all the products, services and results that the project will provide. In other words, you work out the work that needs to be done.

In this document, I have taken the liberty of applying the project management body of knowledge[3] and have named this forum the First Scoping Forum.

1.3 The documents normally produced when initiating a project

When a project is initiated, there are three important documents that are produced as part of the process. Each subsequent document builds off the one before it in a process known by project managers as 'progressive elaboration' (sounds tricky, but just think of it like growing a plant: first you plant the seed, then the seedling sprouts, then seedling grows into a plant.). These three documents are:

- **STEP 1: The Statement of Work -** A narrative description of products, services or results to be delivered (in other words, the brief 'story' of the project, expressed more as an idea than a plan).

- **STEP 2: The Project Charter -** A document issued by the project initiator that defines the project, formally authorises its existence and provides the project manager with the authority to dedicate organisational resources to project activities.

- **STEP 3: The Project Scope Statement -** The detailed description of the project scope, the major deliverables, assumptions and constraints.

- (And as for the word 'deliverable, that simply means any product, result, or capability that must be produced to complete a project, or any process or phase within the project).

Now that the First Scoping Forum has been held, we are somewhere between steps 1 and 2. We have more information than we need to produce a Statement of Work, but less than we need to produce a full Project Charter. This is why I have titled this report "The Beginnings of Our Project Charter".

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[1] http://dictionary.reference.com/browse/scope
[2] All five processes being: initiation; planning; executing; monitoring and controlling; and, closing.
[3] From "A Guide to the Project Management Body of Knowledge (PMBOK® Guide) - Fifth Edition."

2. The First Scoping Forum

The Working Group determined the overall program for the Forum, and I prepared the process for the facilitated workshop session. After a warm welcome by His Worship the Mayor Russell Aubrey (City of Melville), short presentations were given by David Wray (DLGC), Ken Marston (COTA), Jodie Holbrook (WALGA) and Christine Young (CoM).

2.1 Messages from our guest speakers

Each of the speakers provided important messages for the participants to consider. These messages are summarised below.

- As a society, what we really need at the deepest level is community culture change so that age-friendly communities (AFC) simply becomes "they way we do things here in WA". The World Health Organisation (WHO) Global Network is a great source of information, knowledge and justification for action here in WA, and we must draw on it, adapt it, augment and build upon it so as to use it to our advantage (www.agefriendlyworld.org).

- To work together in the short term, and to create community culture change in the longer term, we need to share and grow philosophical perspectives about ageing and AFC. This would give us, as an extensive and potentially very powerful stakeholder community, the moral? What does this word really mean clarity we would need to lobby for and instigate real change for people in communities.

- Through the AFCN, we should build our appetite for learning--'lessons learned': for openly sharing our stories of what worked and what didn't, and to provide mutual support across the regions and the state, which will help to alleviate the effects of isolation.

- We should use evidence-based decision-making wherever possible, but we should also build our desire to find and test out 'what's new' in AFC so that we are not always looking back to best practice, but also looking ahead to 'next practice'. To do this, we need to value a certain level of risk-taking in our planning and practice. This may be a challenge for some local governments.

- Regardless of whether we are looking back to best practice or looking forward to next practice, we must always hold firm to first and basic principles, keep and build upon what works, and ensure that our language is never used to mystify or exclude anyone – plain English, jargon free.

- We must ask people what they need to build their individual and collective capacity to help create AFCs and ensure that true community development is supported (i.e. grassroots-up development, where people in communities, especially seniors, get to determine the supports, services, products and results that end up being delivered).

- The issues and challenges for the creation of age-friendly communities in each local government area are actually quite complex, and the State Government must be part of the process, supporting and supplementing the AFCN through state and regional agencies, but never driving it.

- All local governments must ensure that AFC goals, issues and ideas are expressed in their Strategic Community Plans, as this is really the only way that significant AFC work can be picked up by local governments in their Corporate Business Plans.

- The AFCN should link with the WALGA State Council, which is an interested and supportive peak body for local government in WA. The State Council has the leadership and influence to push issues through to the highest levels.

- The best way forward for local governments, and for the AFCN, is to start small and to be intelligently selective because small things can have a big impact, and enough small wins combined can easily become significant victories when they gain the attention of the key decision-makers.

- It is important to brand our AFCN work as driven by the AFCN partnership, otherwise people/residents may not be able to make the connection between the AFCN and age-friendly changes being made in their communities.

- There are AFC indicators, developed by the WHO Global Network and ready to apply here in WA – we should use them and continue to build upon them.

- We must make sure we capture information as we go, rather than at the end of major initiatives, and this applies to the establishment of the AFCN itself. The use of the Most Significant Change Technique could be invaluable here.

2.2 The facilitated workshop session

The steps below provide a summary of the workshop session.

a) Why age-friendly communities matter

Participants watched a short but very moving and inspirational video clip:

- WHO: healthy ageing – adding life to years

(to view, go to ttp://www.youtube.com/watch?v=LL-TJjCJPaI)

b) A better way of working together

I then asked people to imagine what the ideal age-friendly network would look and feel life for them, if they could have everything they wanted for it. This was a whole forum discussion and I recorded all information.

c) Your 'best of' stories about networks

In small groups, with the help of recorders, participants reflected on their past experience of networks, and shared information about what has worked really well for them in the past, what is working really well for them now, and what makes these things so good. All ideas were recorded.

c) What's mission critical?

As a whole group, we reviewed all the 'best of' points and performed the 'Lump and Split' technique to help us reveal the key areas of work for the establishment of the WA AFCN. We then discussed what would be 'mission critical' in each of these areas.

d) What must we do now?

The workshop culminated with a very frank discussion about what really needs to happen now to continue planning for the establishment of the WA AFCN.

3. The Project Charter…to this point

3.1 Project Goal, Purpose and Success

Project Goal – the ultimate difference the WA AFCN will make

In the longer term

Community perceptions of and attitudes towards seniors and ageing will change and become less ageist over time. They will become more positive and inclusive so that eventually, being age-friendly will be the new normal in our communities and for all agencies, services and industries. This will lead, we hope, to greater community connectedness and neighbourliness in general, with people knowing and looking out for and supporting each other.

In the medium term

We will have a collective, united, influential voice for AFC in WA. We will see the emergence of more genuine and meaningful partnerships between agencies that really make things happen on the ground in local communities. And our AFC practitioners will be fully supported by the network to test new AF concepts out in the community in pursuit of 'next practice'.

Project Purpose – establishing the WA AFCN

To establish a network that gives its members decision-making power in terms of establishment, governance and management, and enables the voices of all seniors across the WA community to be included and heard.

Project success

What do we want?	So what must we measure?
▪ A well defined, shared philosophy and purpose for the AFCN, articulated clearly in plain English.	▪ *Indicators of network culture.*
	▪ *How well the goals of projects and activities branded as AFCN align with the purpose of the AFCN.*
▪ 'Age-friendly' never diluted as the purpose – the focus always remaining on age-friendly.	▪ *Alignment of the goals and objectives of AFCN-branded projects and activities with the goals and objectives of the AFCN.*
▪ A member-driven network – members determine the scope, content, direction etc.	▪ *Indicators of network culture.*
▪ A network that is administered and	▪ *User satisfaction with all functional*

facilitated well.	*aspects of the network.*
▪ A highly engaging and easy to navigate AFCN WA website.	▪ *User satisfaction with website.*
▪ WA AFCN members to be patient, understanding and cooperative during the set-up phase.	▪ *Qualitative indicators of network culture – to be determined early and measuring to begin as early as possible. Consider using the Most Significant Change technique.*
▪ A safe, non-judgmental online environment in which to share information.	▪ *Indicators of network culture.*
▪ Members of the WA AFCN to feel empowered and recognised for their achievements and contributions.	▪ *Indicators of network culture.*
▪ High levels of energy for AFC work – with evidence being generated of practical, meaningful and desired change in local communities.	▪ *Local, regional and state level AFC activity.*
▪ An AF practitioner community that is willing to take risks and test new concepts in the community, evaluate and learn from them.	▪ *The appetite for risk within the AF practitioner community.*
▪ A highly networked network! (e.g. the WA AFCN as a member of other AF networks, such as the WHO Global Network)	▪ *Member perceptions of the usefulness of cross-membership and international links.*

3.2 Project Objectives with some suggested activities

1) Governance and leadership of the WA AFCN

To define and build governance and leadership principles, structures, systems and processes to enable the best possible oversight and championship of the WA AFCN. This is about giving the network the best possible chance of success in the long term.

- Determine the values, principles and desired outcomes of the WA AFCN as early as possible.
- Develop Terms of Reference for the WA AFCN Governance Team.
- Incorporate the WA AFCN.
- Ensure that those on the Governance Team constantly champion the vision and principles of the WA AFCN.

- Gain overt and deliberate engagement with the WA business community.

2) Management and administration of the WA AFCN

To define and build management and administration policy, structures, systems and process that enable the best possible operational functioning of the WA AFCN, and allow us to maintain flexibility and be responsive to the needs of those who use the network.

- Establish a network structure from the ground-up that is highly visible to all members (i.e. you can easily see how it is 'built' in terms of 'who's who in the zoo'), facilitates feedback (i.e. it is easy to provide your feedback to the administrators and have them communicate back to you) and demonstrates accountability (i.e. you know with whom the buck stops and who makes decision at different levels – and every member is accountable for their contribution and participation).
- Develop a system for rotating/sharing the management and administration function of the WA AFCN, rather than having one agency cpntinuously carry the entire load.
- Determine how the WA AFCN will be funded.

3) WA AFCN Website

To design and establish the WA AFCN website, perhaps with 'chapters' for regions.

4) WA AFCN learning and communication culture

To establish 'lessons learned' communication systems and processes that help to build a culture of supportive learning and open communication within the AFCN membership.

- Develop a Partnership Agreement/Code of Conduct to be signed by all WA AFCN members.

5) AFCN Methods, tools, techniques

To provide methods that help people do AFC work in their communities in logical ways, with tools to help them accomplish AFC tasks, and techniques to help them approach those tasks in ways that are most relevant for their communities.

6) Monitoring and evaluation of the WA AFCN

To implement practical, easy to use monitoring and evaluation processes that enable us to keep in touch with 'how we're going' with the AFCN, and make the right sort of changes over time that meet the needs and desires of those who use the network.

- Determine the specific indicators and measures of success for the AFCN and the best methods and techniques for collecting data (qualitative and quantitative).
- Develop an effective knowledge management (KM) system that moves members through the entire KM cycle (see Appendix 1: Knowledge Management).

4. Agreed next steps forward

This First Scoping Forum was certainly not the first AFC action in WA. Considerable work has already been done across the state and several local governments have been very active and successful the in AFC area for several years. We acknowledge this commitment and investment and intend to build on the momentum it has already created.

At the forum, participants agreed that the following steps would be taken to move ahead with the establishment of the WA AFCN.

4.1 Current Working Group to take leadership

The current WA AFC Working Group will take responsibility for progressing the steps listed below. It is likely that more people will be invited to participate in the Working Group, as the amount of work involved in these steps is considerable.

4.2 Complete Project Charter and Scope Statement

This Project Charter needs to be completed and 'elaborated into' a Project Scope Statement so that all the information that would be needed to apply for a funding grant is gathered and compiled in the most logical way.

4.3 Apply for funding

Once the Project Scope Statement is completed, the Working Group will apply to funding bodies so that the network can begin to be established.

4.4 Appoint a WA AFCN Project Manager and Team

The establishment of the WA AFCN is a project in itself, and it requires the services of an experienced project manager and project team members.

4.5 Build the WA AFCN Website

The most desired form of the network is online. It is important to build the online AFCN with as much participation of the members as possible.

5. Ideas for the WA AFCN logo

Here are mine…

youwe
you to the power of we
together we are better

youus
you to the power of us
together we are better

What about yours? Logos/visual images are not my bailiwick, but these logos strike me as too general and would say nothing to older people or communities about the network and its focus.
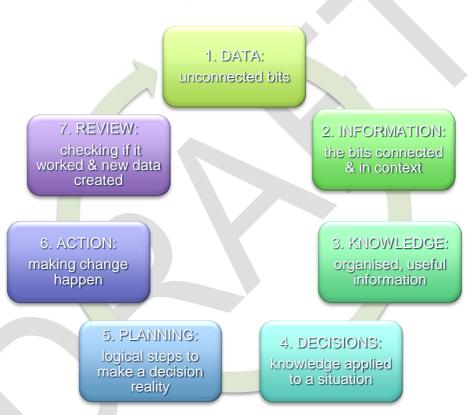
6. Appendix 1: Knowledge Management

So what's Knowledge Management (KM) all about?

"Knowledge Management is the discipline of enabling individuals, teams and entire organizations to collectively and systematically capture, store, create, share and apply knowledge, to better achieve their objectives."

Ron Young, Knowledge Management Online www.knowledge-management-online.com

This definition says it all. The next thing to know is that KM should occur in a cyclical way.

The knowledge management cycle

1. Data:	The depiction of facts.	
2. Information:	The data is put into context and reported in relation to something.	
3. Knowledge:	The appropriate collection and connection of information that makes it useful.	
4. Decisions:	The use of knowledge as evidence, and the making of decisions based on that evidence.	
5. Planning:	Determining a series of logical steps that will make the decision a reality.	
6. Action:	Implementing the plan. New facts now exist in place of the old facts because of the action that was taken.	
7. Review:	The change is assessed, which in turn produces new data (and back to the beginning we go).	

As we move around the cycle, the data, information, knowledge and people get more and more connected, and our understanding becomes deeper and deeper.