



SCAV Conférence annuelle CSVA Annual Conference 2004

Le *Value Management* pour remodeler
une organisation gouvernementale -
Using Value Management to redesign a
government organization
Par / by Roger Giroux

Objective and the context of the presentation

■ Objective

- Explain the contribution of Value Management to the reform of Public Curator of Quebec

■ Context

- Context of the organization and its reform
- Phases of its reform and the role of Value Management
- Approach management
- Results and their integration within governmental development

Looking back... Context of the organization and its reform

**DANS L'INTÉRÊT
DE LA PERSONNE**

**IN THE INTEREST
OF THE PERSON**



Missions of Public Curator

■ Protection

- The Protection Division supervises and coordinates protection and representation services for incapable people and the administration of their assets

■ Unclaimed Property

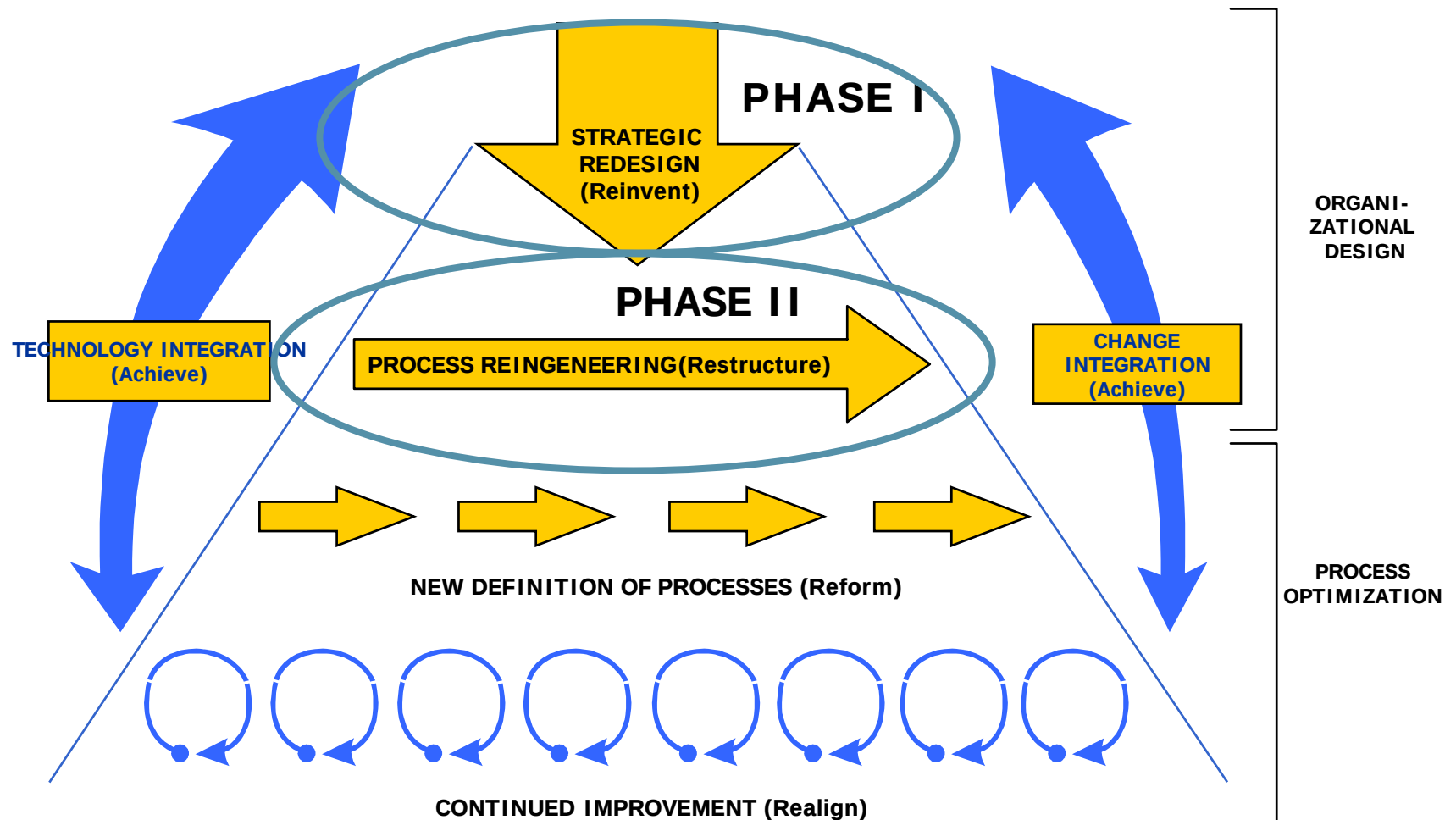
- The mission of Unclaimed Financial Products is the collection and provisional administration of the unclaimed assets, and their liquidation under the jurisdiction of the Public Curator in order to transfer them to their rightful owners, claimants or, if none, to the government.

Value Management has been used to serve protection.

Context and background...

- 1997-1998: Unfavorable reports by the
 - Auditor General
 - Ombudsman
- Reported major deficiencies in the performance of its mission.
- 1998-2001: Profound reform in crisis management mode. Urgent need to react.
- 2001-...: Thorough restructuring of the organization

Phases of the reform: Dynamic interplay



Who is it done for?

- Our clients
 - Incapable people
 - Private representatives and tutorship councils
 - Mandataries
 - General public (information and registers)



REFORM OF THE PUBLIC CURATOR (PHASE I) 1998 - 2001

- Reorientation on persons
- Professionalization and regionalization of the organization
- Raising and restructuring the resource level (from 200 to 400 – 600 staff changes) (from 3 to 23 managers)
- Development of general service structures
- Beginning of the implementation of new ways of doing without detailed plan or method

Reform of the Public Curator (Phase 1) 1998 – 2001 (*cont'd*)

That is how the Public Curator of Québec
reinvent itself.

Now, it has
to be rebuilt ...

The reform in two phases

- Phase 1 completed
 - Socially recognized mission
 - Reorientation on the person underway
 - More active presence with people and community resources

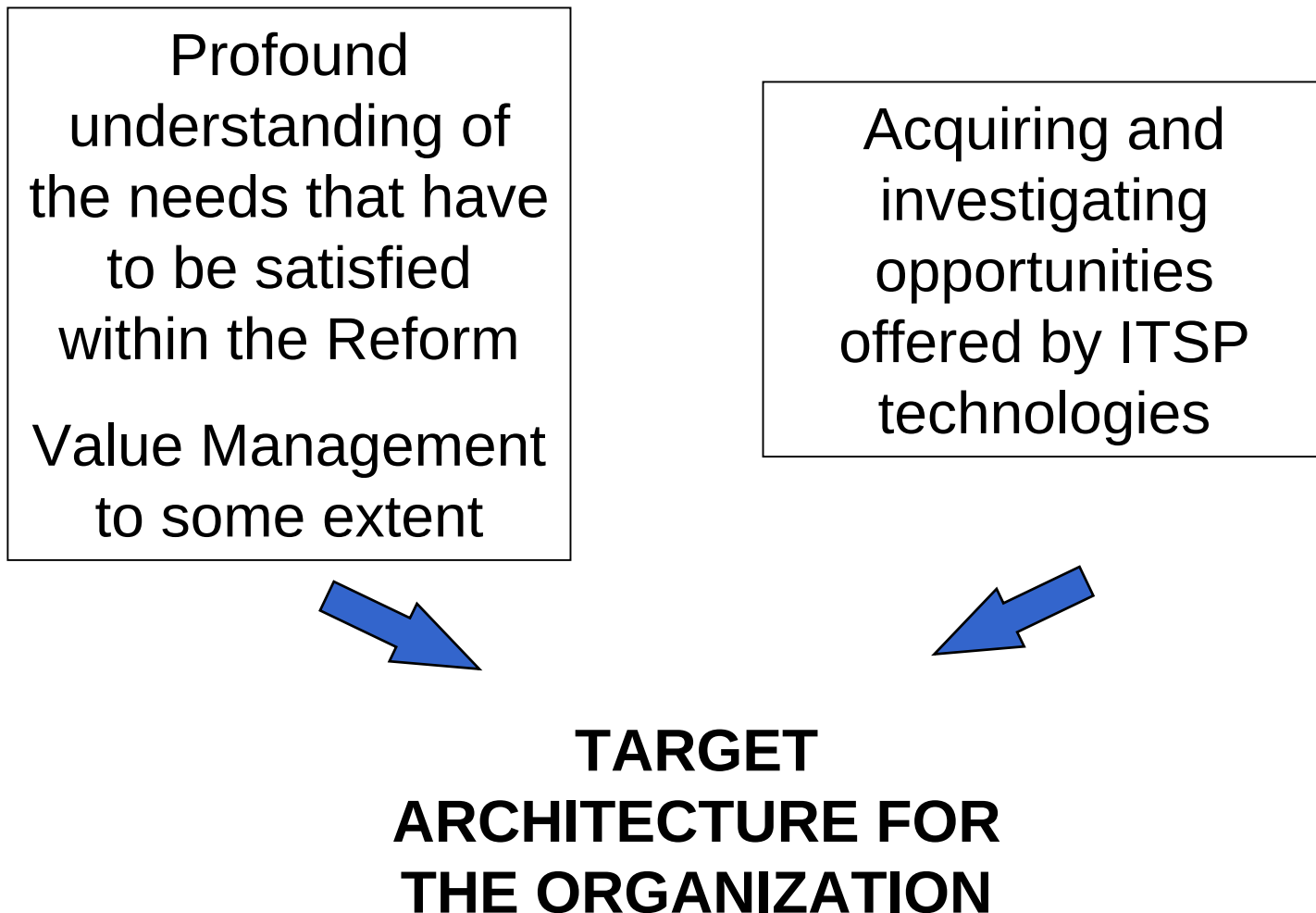
Phase 2 (in progress) – 2001-...

- Defining the expected service levels
- Developing, structuring and equipping Protection management
- Developing an optimal organization
- Redoing the computer support system for the Public Curator while continuing short-term improvements

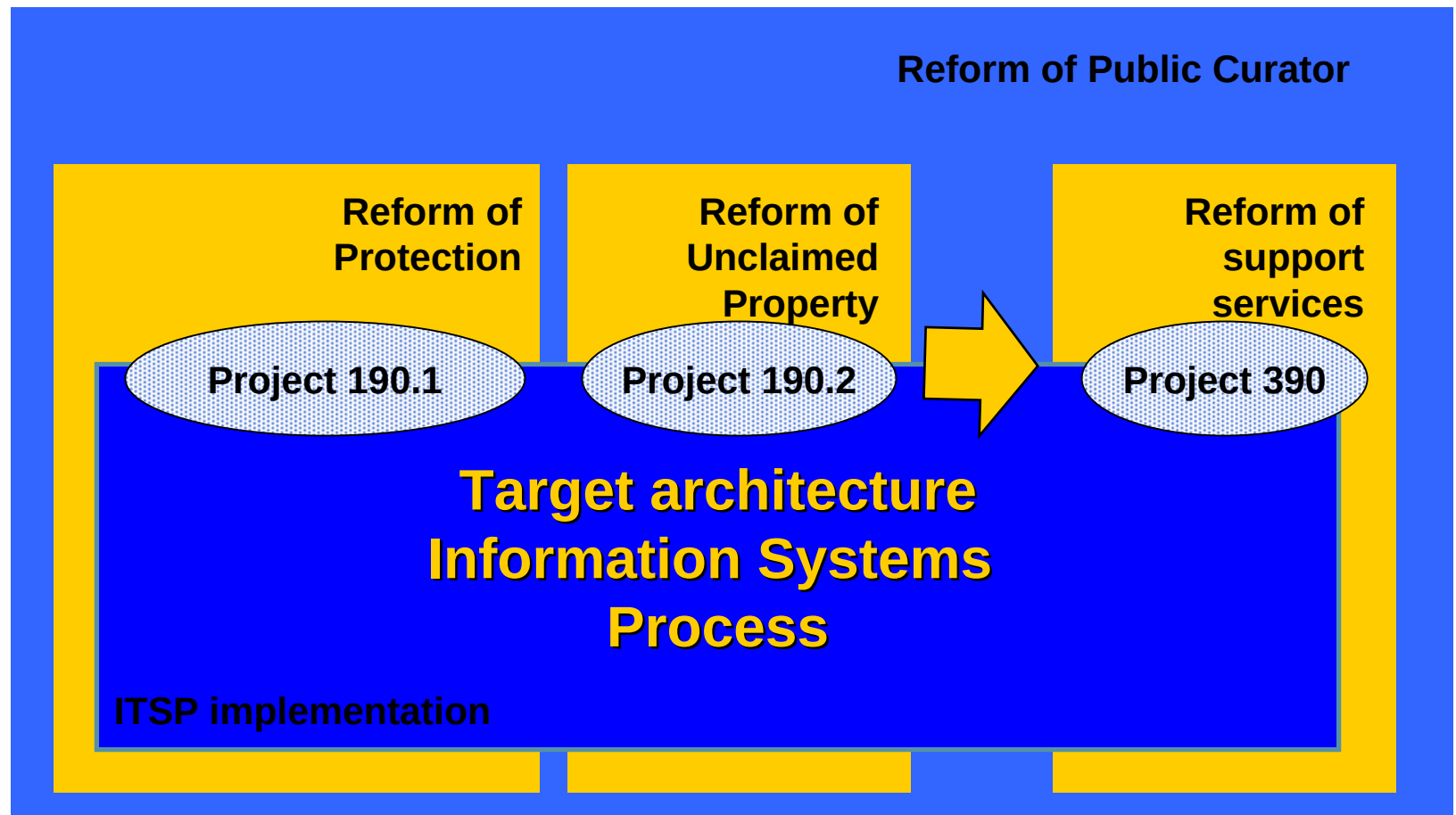
Throughout the project, Value Management was used to

- Identify client needs
- Adopt a vision for our organization for 2006
- Identify our strategic functions
- Define the expected service levels
- Develop an optimal organization

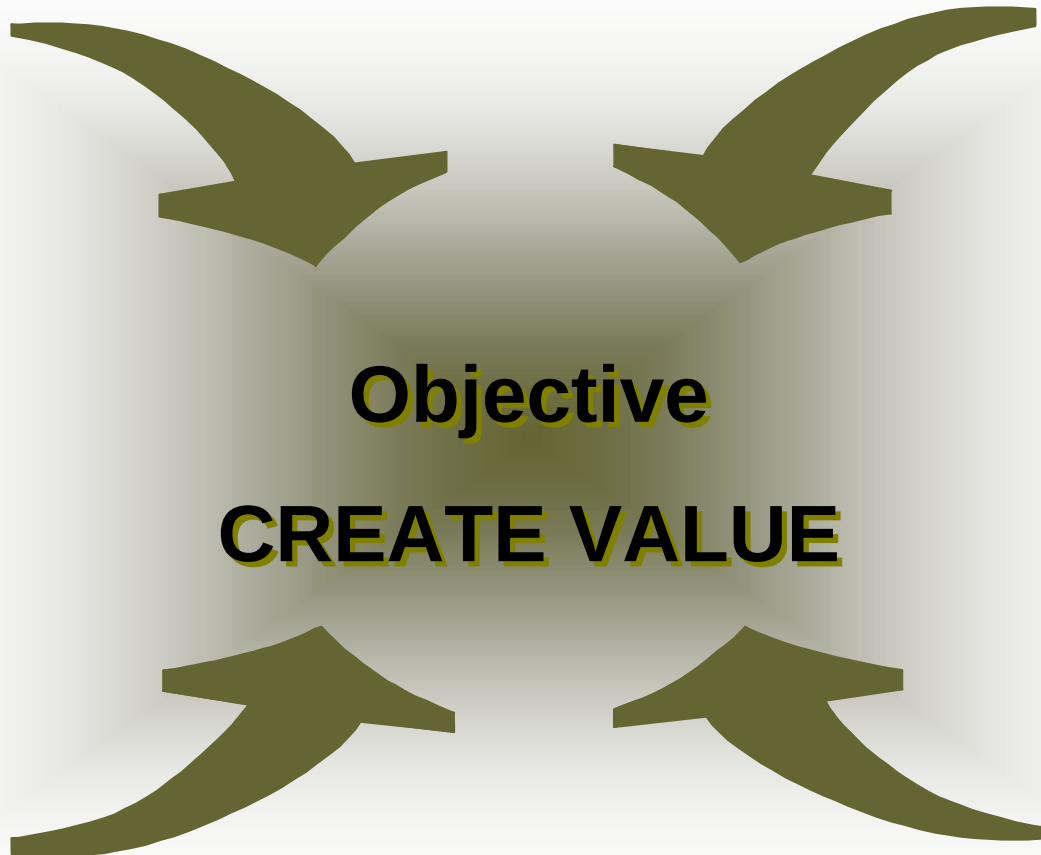
Integration of Reform and Implementation of Information Technology Strategic Planning



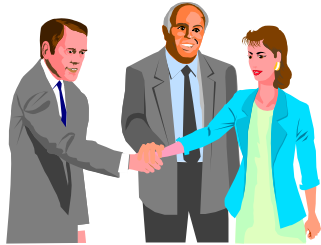
Put into context



Value Management

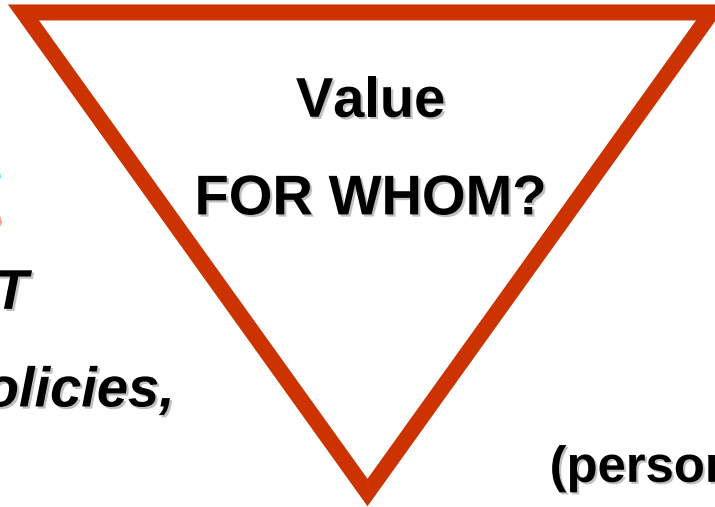


Create Value



GOVERNMENT

*(elected officials, policies,
society)*



EMPLOYEES

*(personal development, health,
pleasure, remuneration)*



CITIZENS-CLIENTS

(Service levels)

Approach

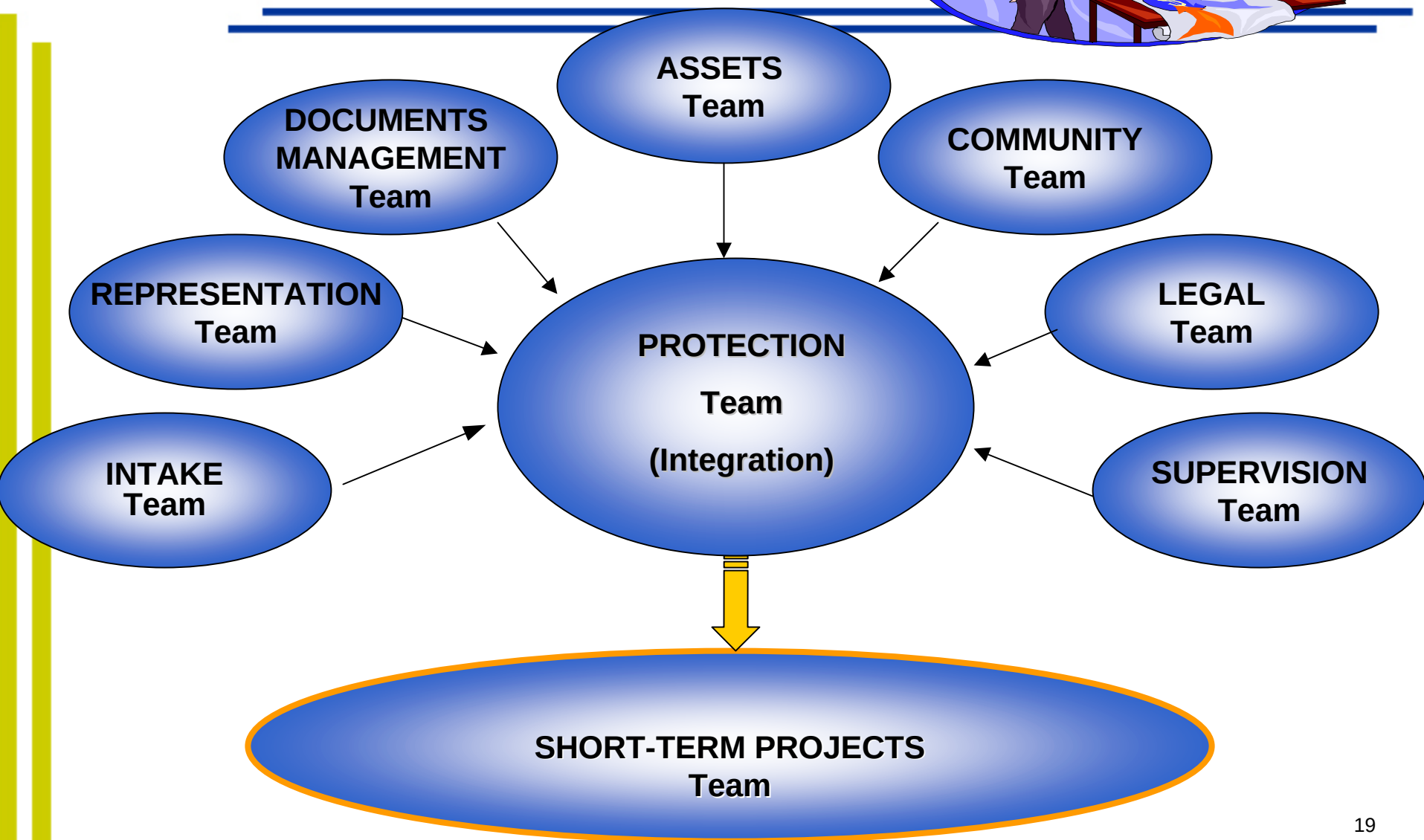
- A reversed participative approach, from bottom / up
- Management Committee adjusts and defines a reference framework for the review and design work
- Teams design the processes

2002-2003

No reform without reform teams!

- 9 teams
- More than 125 people involved (replacement of operational resources)
- A truly participative approach!!

Teams



Roles of the teams

- Agree on needs to be satisfied
- Identify possible short-term improvements
- Define the strategic functions and related service levels
- Identify the beginning of new approaches
- Contribute to the design of different projects that will make the protection reform more concrete

Team Work Schedule

Phases:

1. Initiate work

2. Define needs

3. Identify optimal concept

4. Execute preliminary design

5. Execute detailed design

6. Implementation

Deliverables:

- Work schedule
- Mobilization of project teams

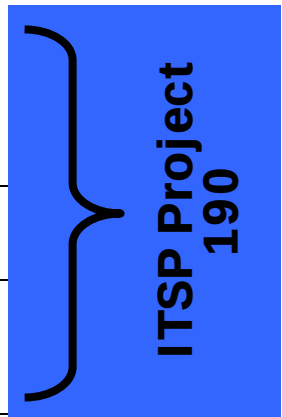
- Service levels

General architecture (freeze needs and concepts)

- Detailed architecture
- Business policies and rules
- Organization chart (roles and responsibilities)
- Implementation and training plan

- Systems
- Directives
- Training tools
- HR integration plan

- Revised and functional organization



Integration team

- Integrate all information received from the different project teams to ensure consistency with the overall Protection vision
 - Validate information
 - Ensure that all aspects are covered
 - Arbitrate potentially conflicting levels and flexibilities

First stage: Results

**Reorientation on our principal reason
for being and define the functional
model for Protection**

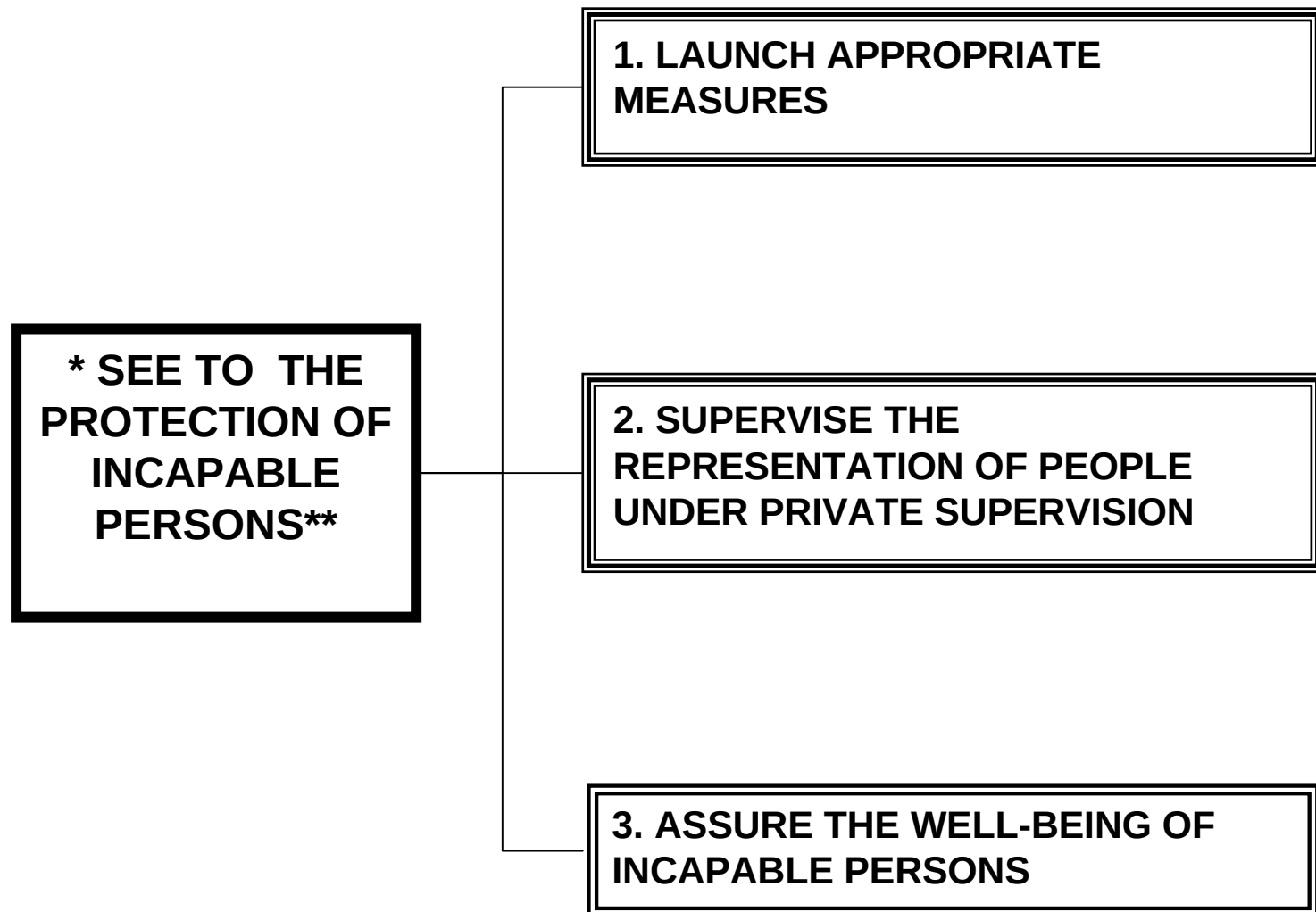
Deliverables

- Architecture of the Curator's Protection Mission
- Implementation of strategy for the architecture

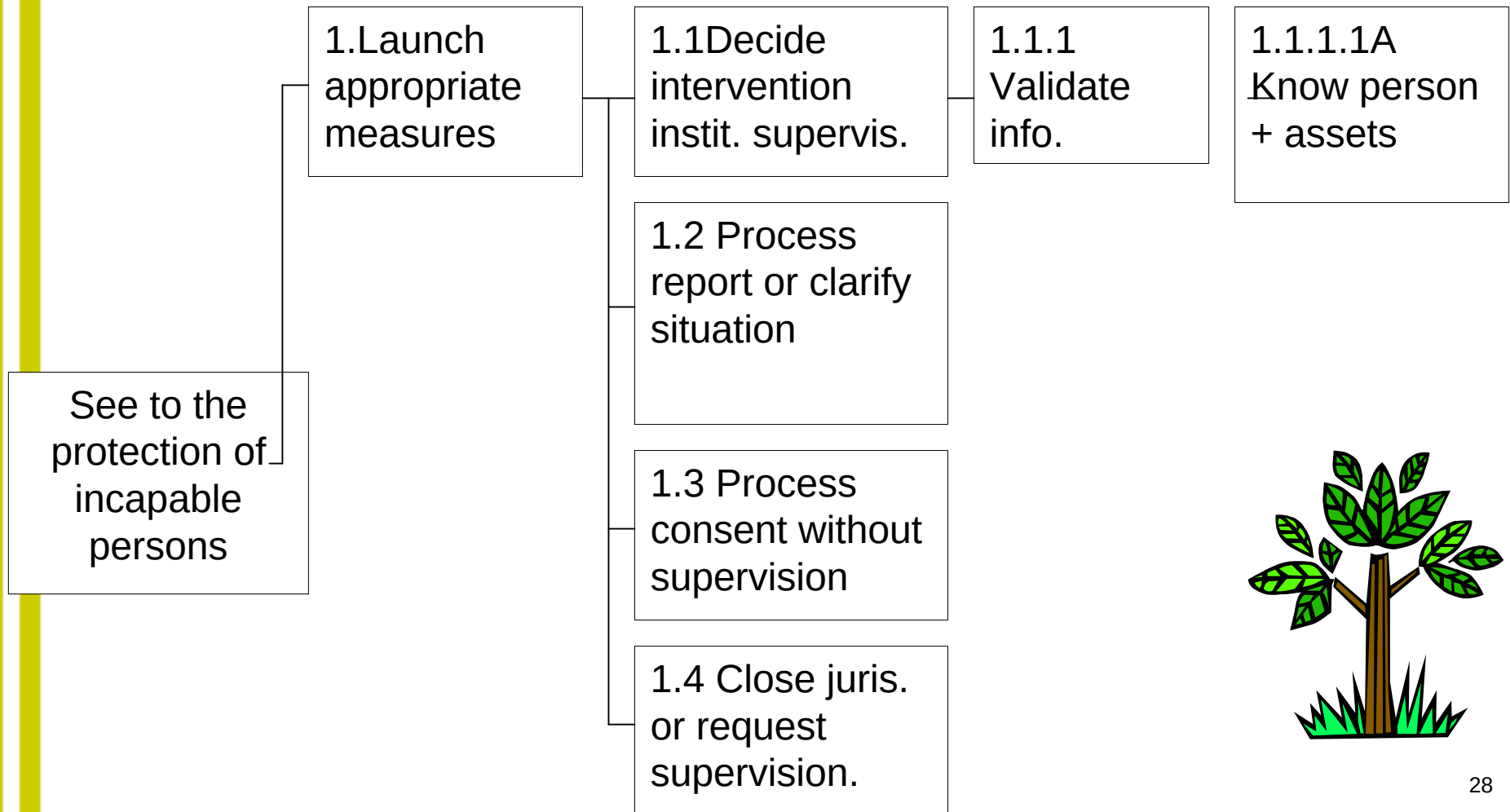
Results

- Functional tree
- Functional specifications
- Short-term projects





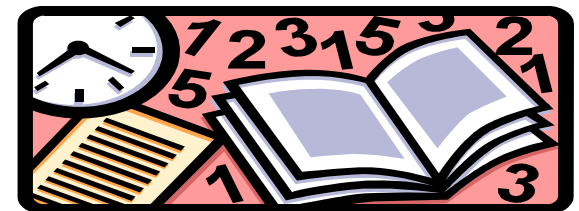
A tree grows many leaves...



After the why and the how, the desired performance

- Results of functions (e.g. action plan)
- Criteria for appreciation (e.g. delay)
- Criteria level (e.g. number of days)
- Flexibility of level (e.g. not negotiable)

We have the functional specifications!



Short-term projects

- Team assignment
 - Identify potential solutions
 - Start short-term projects
 - Obtain small, fast successes

8 Short-term projects (2003-2004)

- Intake screen
- DG (General Director) Report (xml)
- Reassessment form, process revision
- Investigation: harmonization of depts.(DAP-DT)
- Investigation guide + asset record + territorial allocation
- Investigation (guide and process)
- Management framework for personal expense allowances of the incapable
- Processing centre (CTDPAE)

Conclusion of Step 1

- Value Management and the functional model enrich the tools management needs to...
 - Explain its vision
 - Orient its organization
 - Translate its objectives into actions
 - Motivate its staff
 - Stay on track in a constantly changing world
 - Shared knowledge of individual realities
 - Frame of reference for values

Six principles adopted

1. Continue the reorientation on the person
2. The person and his assets form a whole whose parts cannot be disassociated
3. Protection must guarantee sound asset management

Six principles adopted *(cont'd)*

4. Delegate and Client Representative: first line interveners invested with the authority of the CPQ and unique client interface
5. Protection measures for incapable persons are coordinated
6. Synergy depends on mastery of information

Stakeholders involved



- Public Curator employees



- Public Curator clients



- Care-givers and organizations



- Public authorities

Assessment criteria

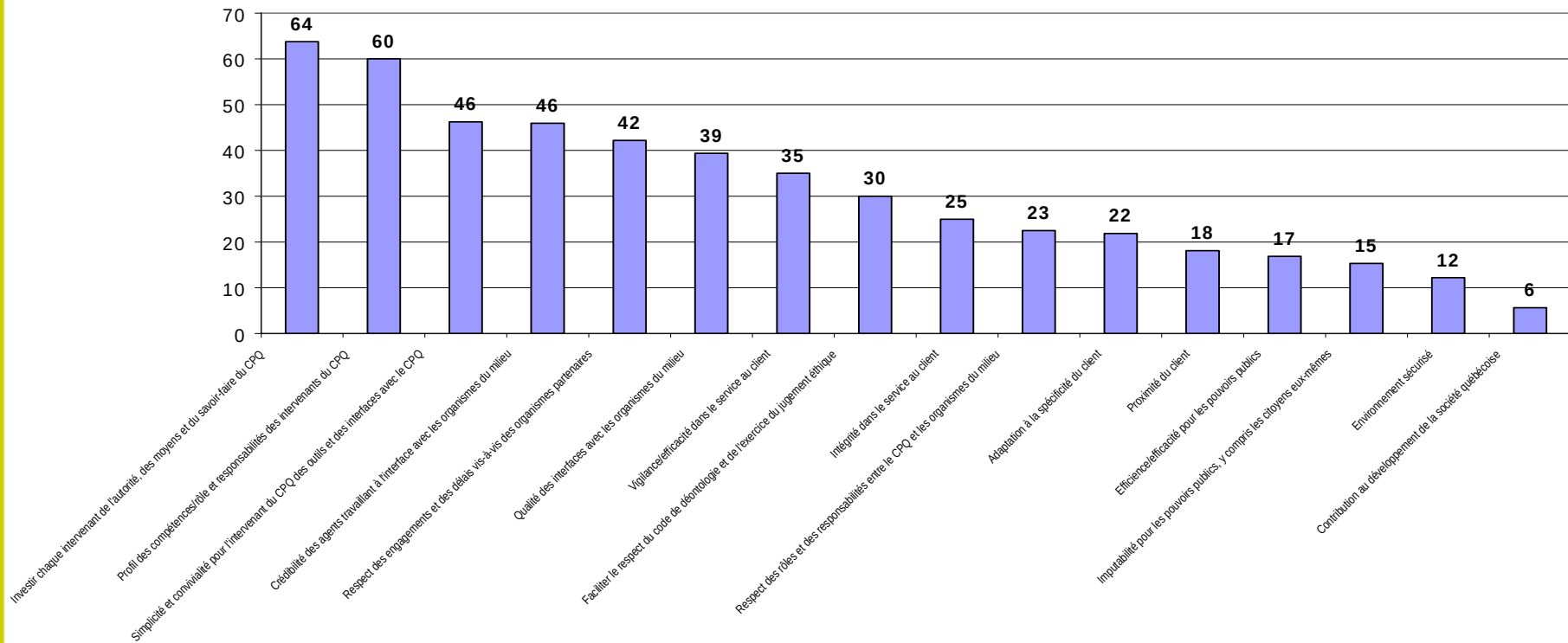
16 criteria + 1 weighting =

1 value framework!

Value framework

Référentiel de valeur - ORGANISATION

2003-03-20



2003-2004

- Step 2
 - It is the year of corporate architecture for the Public Curator!
 - (Methodological, governmental framework)

Now we are ready to design the
corporate architecture for the
Public Curator!

Work teams

- 3 basic teams for the processes
- 11 teams for business objects

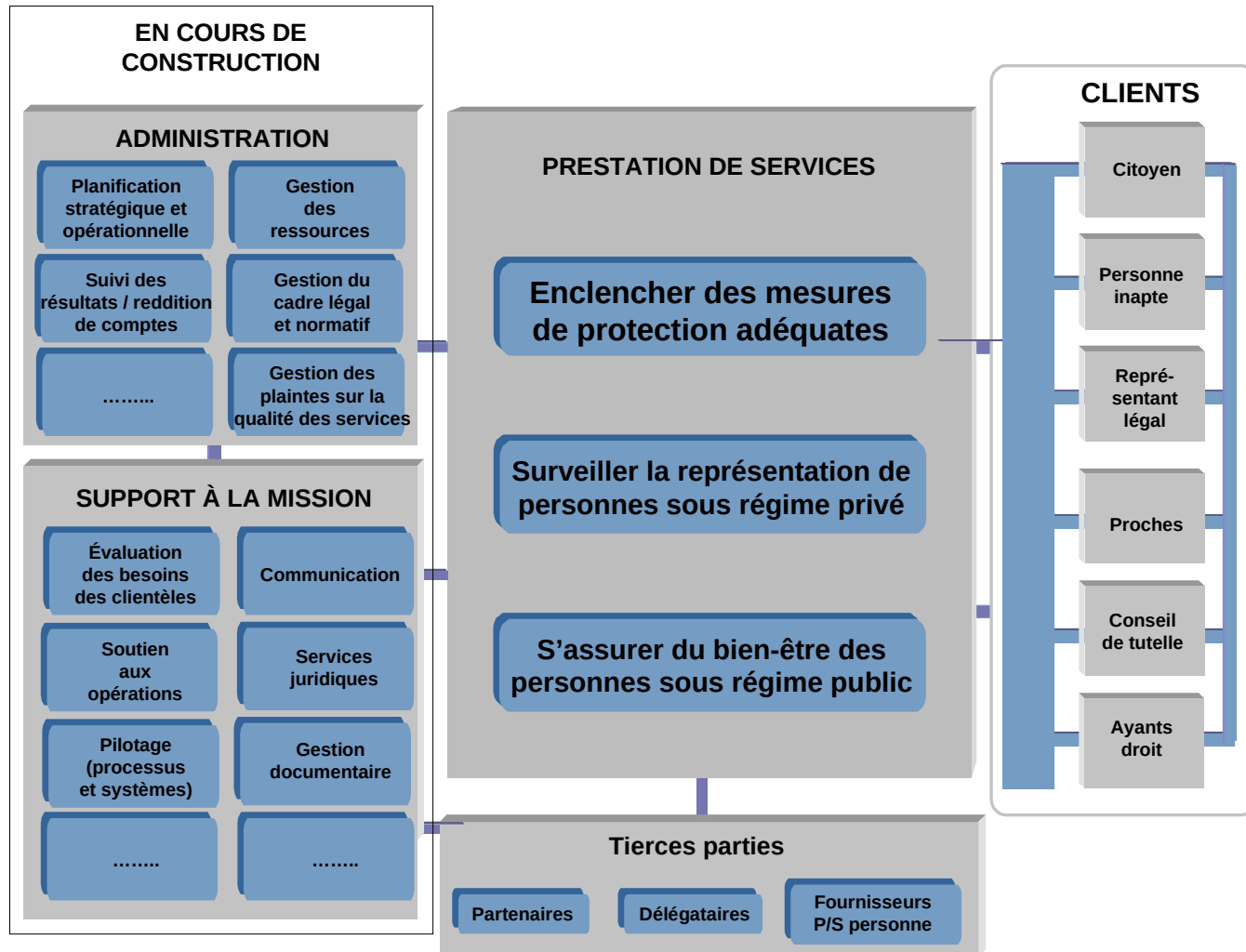
Business processes

- 3 basic teams
 - Intake
 - Private
 - Public representation
- Sub-team
- Validation by integration team

Business objects: 11 teams

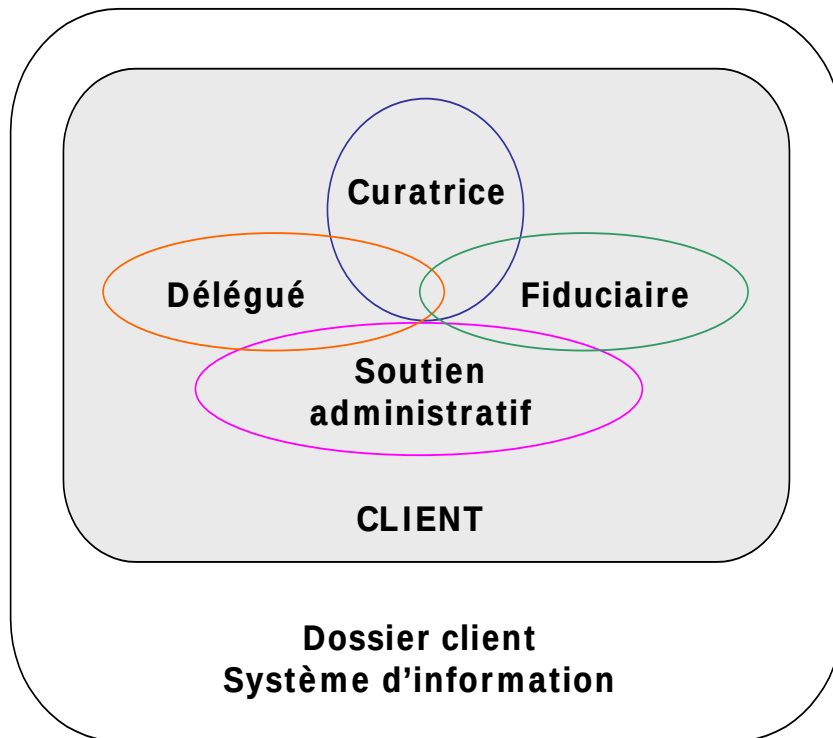
- Correspondence
- Public registers
- Protection
- Resource
- Information
- Validation team
- Services
- Program
- Service
- Documents
- Register / Records
(clients, authorized person, assets, legal proceedings)

Business models - protection

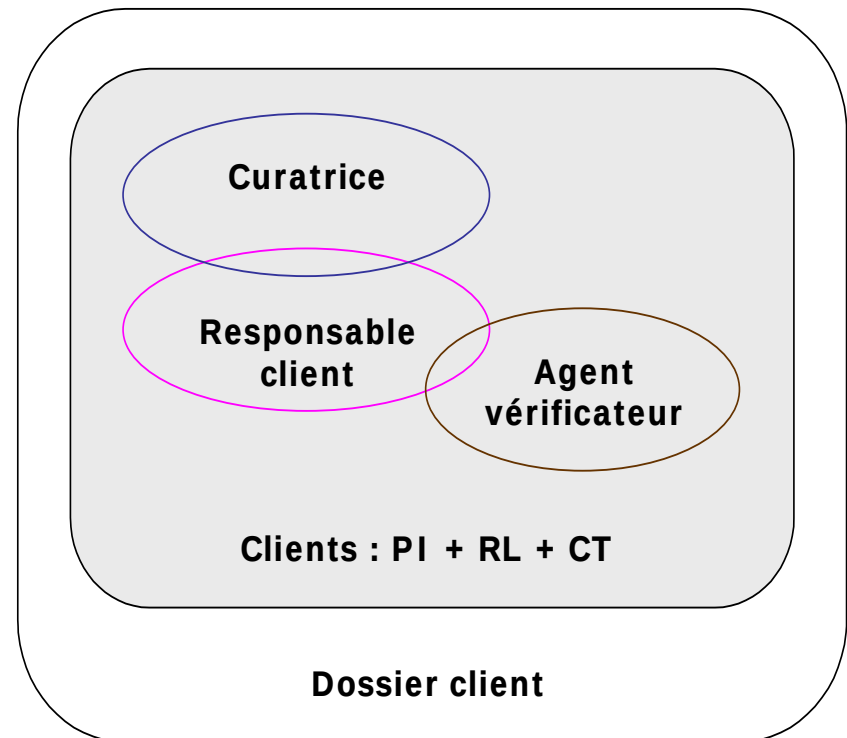


Organizational models - protection

Incapable persons' Protection

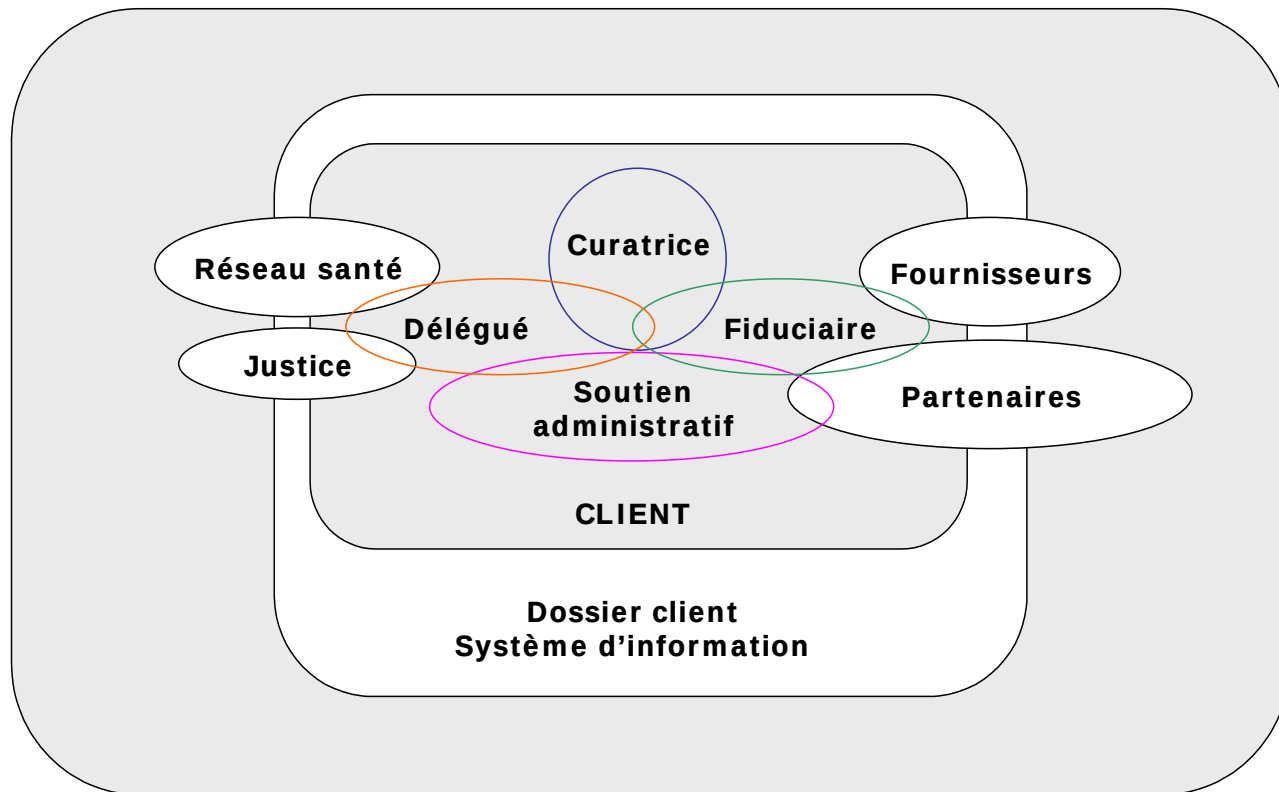


Private supervision



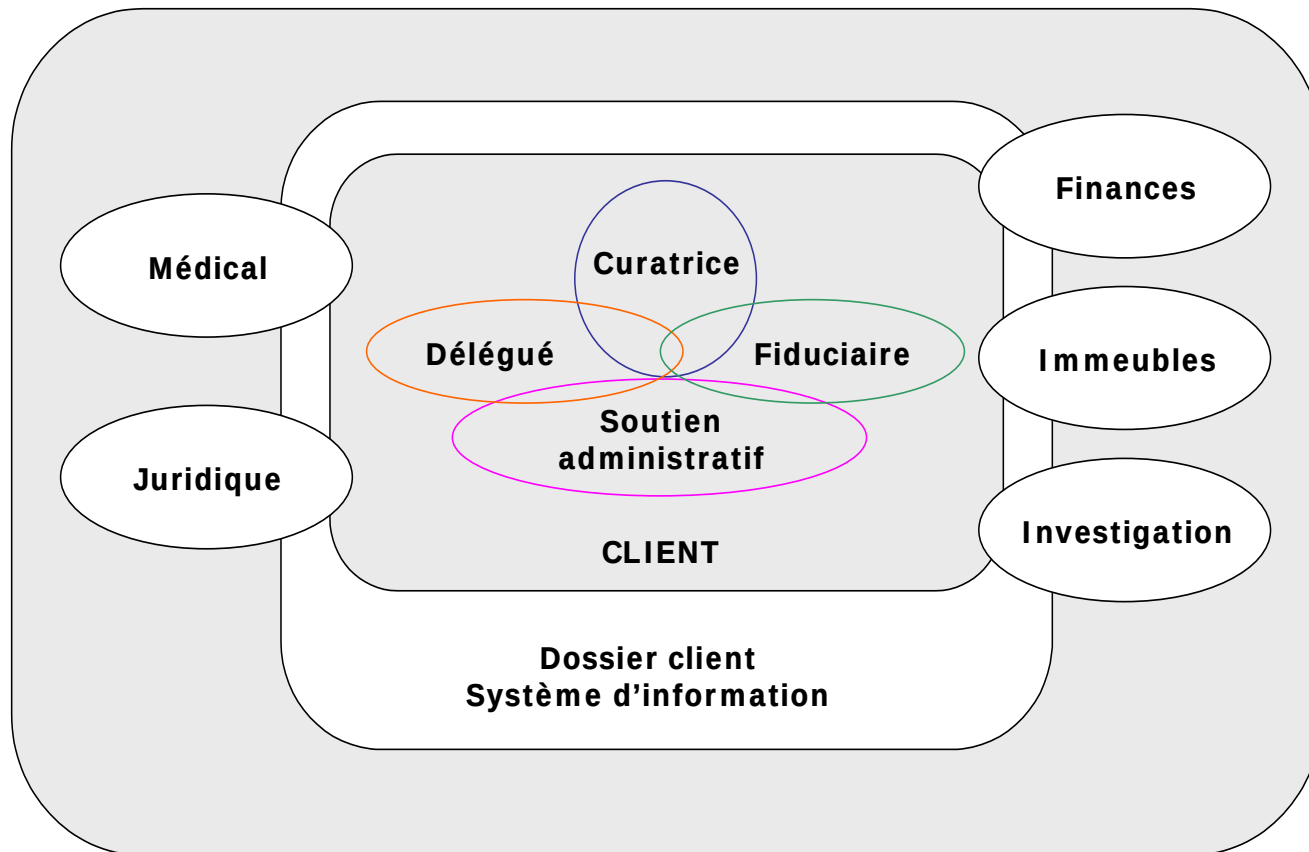
Organizational models - protection

Interface with external stakeholders



Organizational models - protection

Support of internal experts



The design becomes more precise...

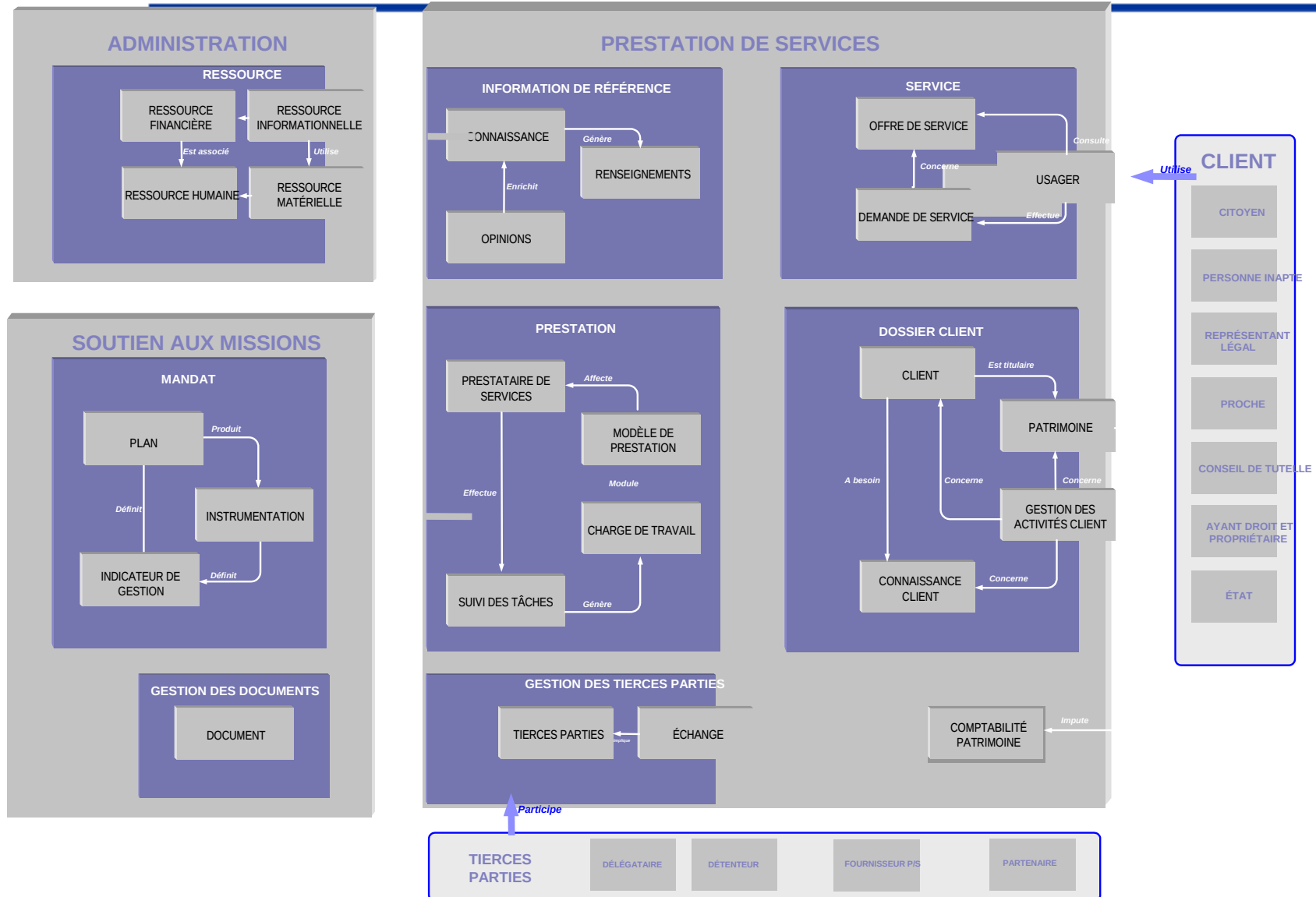
- Business models and processes design the organization of the protection mission
- Business objects design the new information system

Business processes

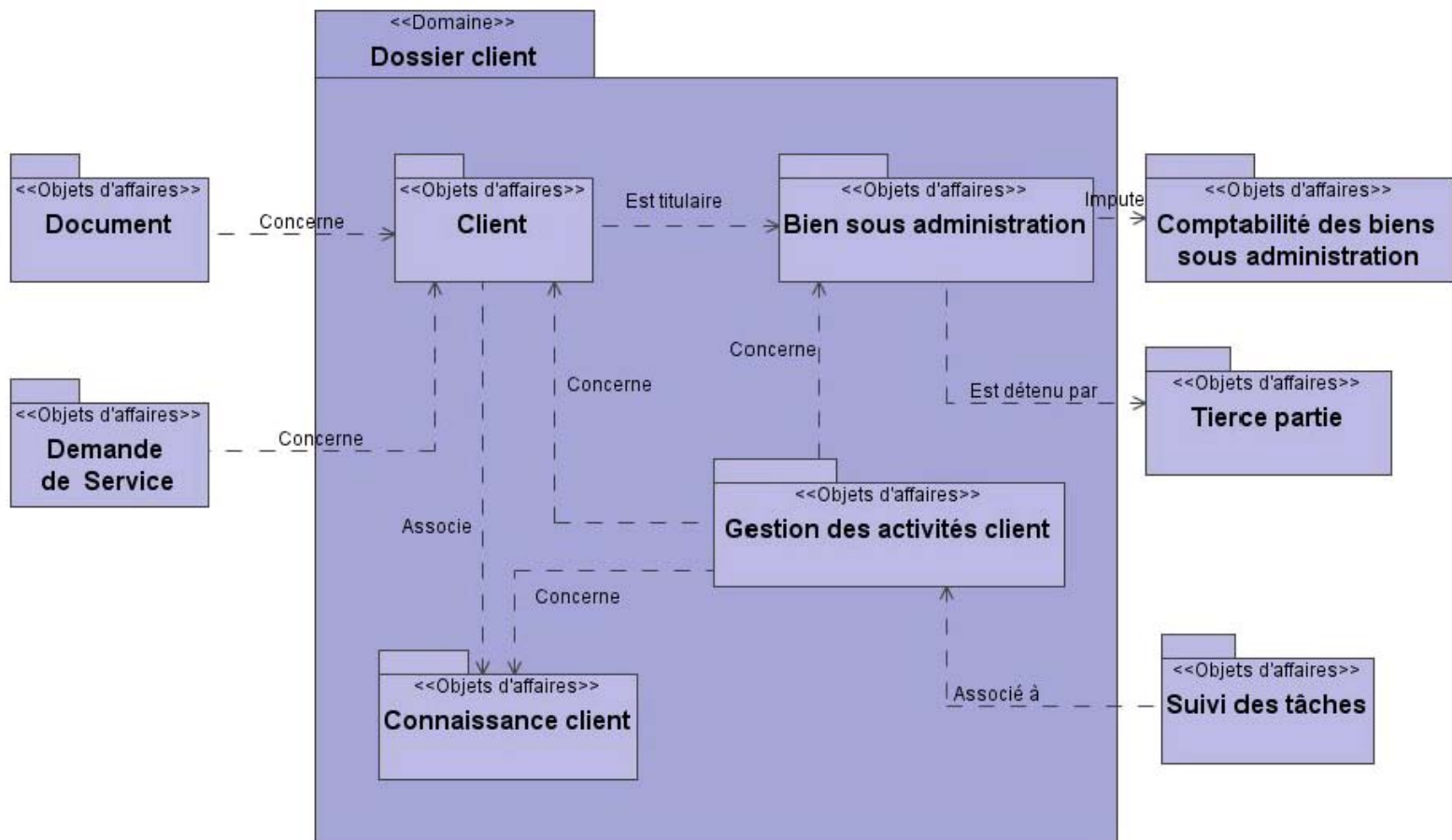
- Launch appropriate steps
- Supervise the representation of people under private supervision
- Assure the well-being of people under public supervision



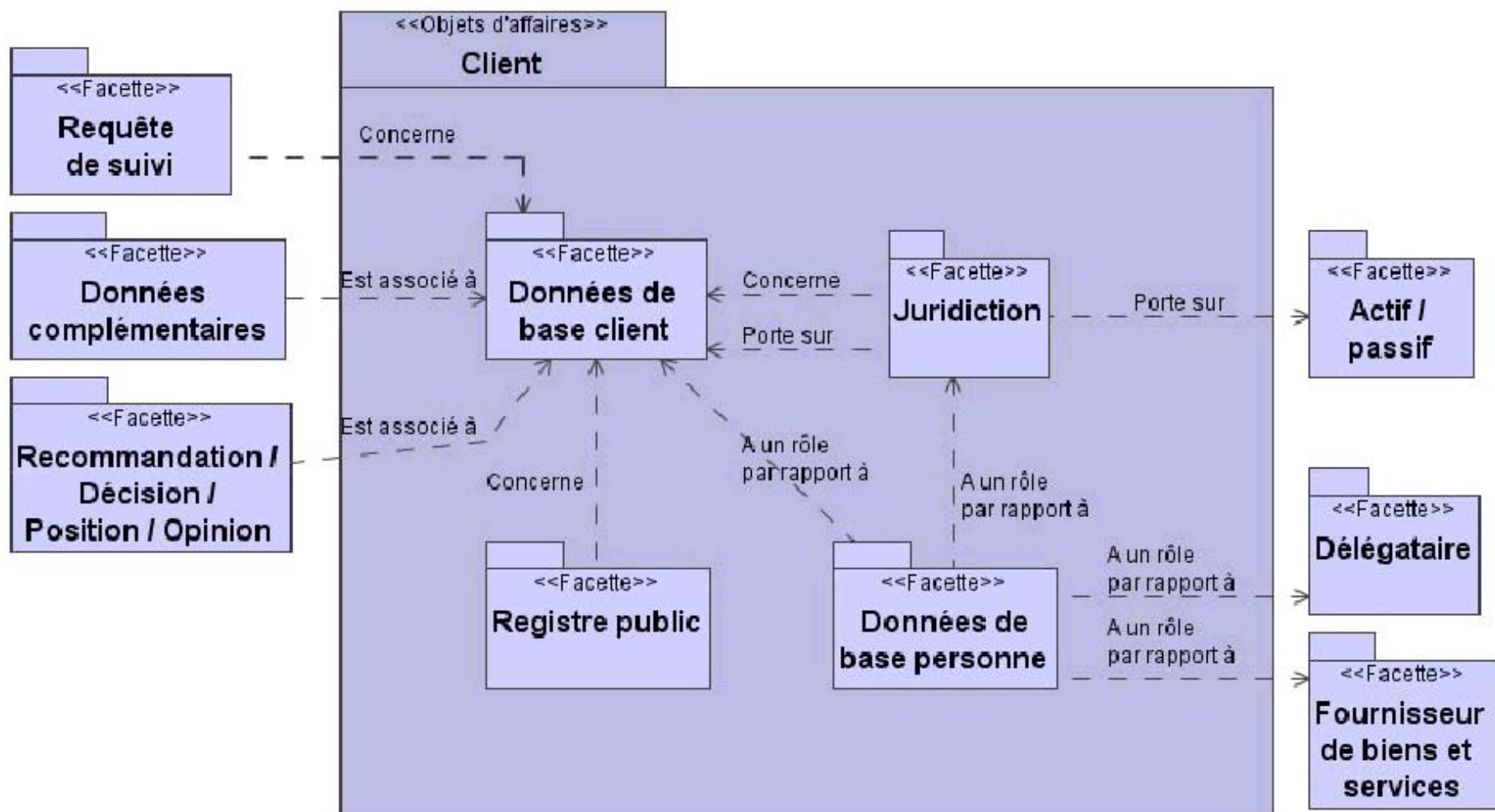
Model for business objects of the Public Curator



“Client file” Area



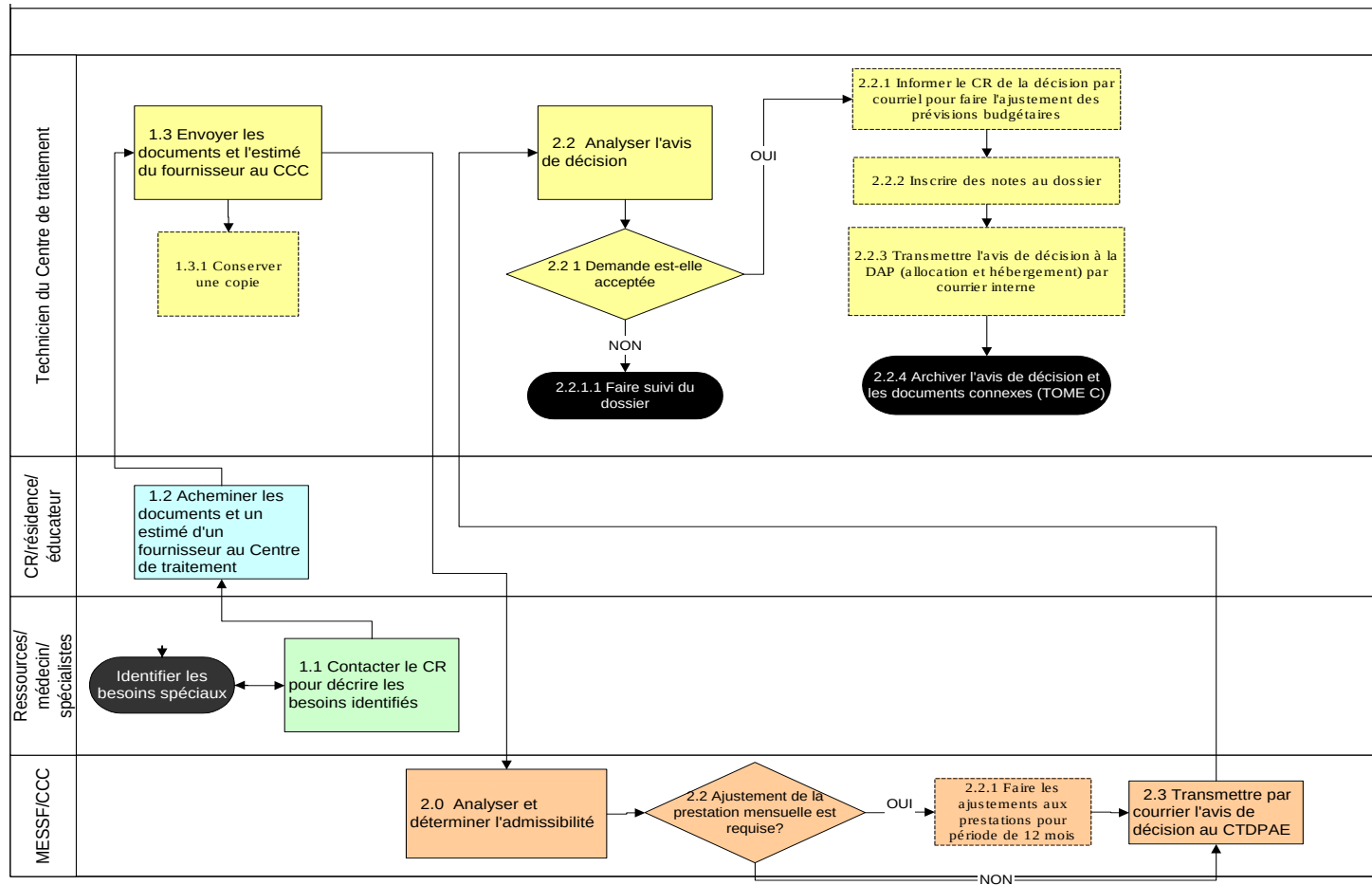
Business object “client”



And now, who does what!

- Specify
 - Roles and responsibilities
 - Organization chart
 - Work processes

An example of who does what



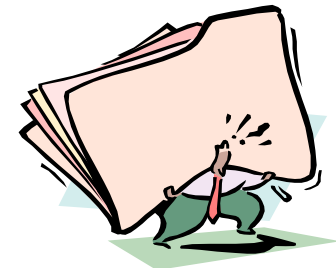


Next step: harmonization with computer solutions

- Sufficiently define the work processes to select an appropriate computer solution
- In computer jargon, it's the preliminary analysis step!

Computer solutions

- Three categories for
 - The whole client relationship management (CRM)
 - Electronic management of documents, reference material and instrumentation (EDM)
 - Management of assets under administration (BSA)



Working together pays off

THANK YOU!