

**CONFÉRENCE ANNUELLE DE LA SCAV
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**Le *VALUE MANAGEMENT* pour
remodeler une organisation
gouvernementale**

**Using Value Management to redesign
a government organization**

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ABSTRACT:

This article presents a synopsis of the redesign process begun two years ago by the Protection Department of the Public Curator of Québec (CPQ). The Value Management (VM) approach was selected to support the project team in their task. During the course of the project, the managers were also trained in VM theory and principles, empowering them to conduct an optimization process as part of the implementation of the chosen solutions.

The innovative aspect of this VM case study is how it transformed the management style of executives by integrating VM principles and Value Analysis tools with the organization's management practices. Examples are:

- The FAST diagram was used as a communication tool and a basic reference for the strategic orientation and business planning review;
- And the same FAST diagram served as a tool for linking strategic goals with process review and improvement project prioritization;
- Functional performance specification (FPS) was used to clarify client user needs and upgrade related performance criteria and levels;
- And FPS was used to clearly define Protection Department needs (not in terms of solutions) for the computer specialists in designing the best value data systems. These are just few confirming examples.

Involving the operations staff in the task created enthusiasm among the troops for reform and sharply reduced resistance from some skeptics while facilitating change management.

Content

1. Introduction	1
1.1. Context and history	1
1.2. Scope of the project	1
2. Orientations and strategies	2
3. Project and specific objectives of the Public Curator of québec's protection mission 2	
3.1. Mission	3
3.2. Objectives of the Protection Segment of the CPQ architecture.....	3
4. Approach: Value Management	3
5. Principal participants and their roles	4
6. Work plan of the teams	5
7. Step one: Architecture of the CPQ Protection Mission.....	5
7.1. Needs analysis and performance criteria.....	5
7.1.1. <i>Functional needs model</i>	6
7.1.2. <i>Performance criteria /performance requirements</i>	7
7.1.3. <i>Summary diagnosis by function</i>	11
7.1.4. <i>Issues</i>	13
8. Step two: General organizational concept (Business segment)	13
8.1. The six general architectural principles.....	13
8.2. Design criteria for the organization: the value framework	14
8.2.1. <i>The stakeholders</i>	14
8.2.2. <i>Criteria associated with the stakeholders</i>	15
8.2.3. <i>The value framework</i>	15
9. Business processes.....	17
9.1. The Services domain	17
9.1.1. <i>Business process 1: "Launch appropriate steps"</i>	17
9.1.2. <i>Business process 2: "Supervise the representation of persons under private supervision"</i>	17
9.1.3. <i>Business process 3: "Assure the well-being of persons under public supervision"</i>	18
9.2. Links with clients and third parties.....	18
10. Target organization	18
10.1. Business model.....	18
10.2. The organizational model and main administrative functions	20
10.2.1. <i>First level of intervention</i>	20
10.2.2. <i>Second level of intervention for public forms of supervision</i>	22
10.2.3. <i>The third level of intervention</i>	23
10.2.4. <i>The fourth level of intervention</i>	24
10.2.5. <i>Complement to services for private supervision</i>	24
11. Conclusion	25

1. INTRODUCTION

1.1. CONTEXT AND HISTORY

In 1997 and 1998, the Ombudsman and the Auditor General of Québec each published a report on shortcomings of the Public Curator of Québec (CPQ) in fulfilling its mission, especially with respect to protection of the person, and thus gave a clear signal that restructuring was required.

Between 1998 and 2000, the CPQ began an in-depth reform of its services in order to implement its refocus on protection of the person. Since 2002, the CPQ has entered the second phase of this reform, which seeks to make it operational and improve the service architecture by having a clear definition of its target performance criteria.

Since the client (the Protection mission) wanted to redefine its organization on the basis of its underlying goals and needs, it opted for an approach called “Value Management.” More than a methodology, this approach is a management style that encourages greater consistency in the larger administrative activities (processes), strategic functions, the organization’s purpose and its statutory obligations.

1.2. SCOPE OF THE PROJECT

The reform currently under way at the CPQ is part of a two-tiered context:

QUÉBEC GOVERNMENT

With the adoption of the *Public Administration Act* in May 2000, the Quebec government announced its intention to focus on the quality of services to citizens. Among the business strategies proposed to achieve this goal was the implementation of the *Architecture d’entreprise gouvernementale* (“AEG” – the public administration model) in order to enable ministries and organizations (M/O) to move toward a network model that promotes collaboration and sharing expertise.

A number of change projects (e.g. management of documentary assets, accounting, etc.) both result from and reflect this overall vision of the CPQ as a government agency that interacts with other public organizations to achieve its mission.

The government orientations, strategies and objectives that create the framework for all AEG-related reform projects are discussed in section 2 below.

PUBLIC CURATOR OF QUÉBEC AND ITS PROTECTION MISSION

In 2002, the Treasury Board gave its approval to a general project to reform the CPQ information technologies. Since these technologies are to be at the service of clients and not the other way around, it was agreed that the business lines themselves ought to make the final choice of solutions, as a function of their own needs.

Accordingly, in spring 2002, the CPQ began to develop an Information Systems Strategic Plan (PSTI) for the 2002-2006 horizon. It was with this general background that PSTI project 9201 (Protection Mission) was defined.

2. ORIENTATIONS AND STRATEGIES

An important element in clearly defining the orientations for offering services to the public is the government strategy on the modernization of the public service. It seeks to create a government that is distinguished for:

- the quality, accessibility and simplicity of the services it offers citizens;
- the optimum management of its resources;
- the management of results.

This strategy takes the form of services that are organized as a function of the expectations and needs of their clientele. In other words:

- products and services are grouped in a way that citizens do not have to concern themselves about the administrative structures or the management constraints intrinsic to large organizations;
- there are diversified methods of offering services that respect the personal preferences of the clientele, maintaining conventional modes of offering services as long as necessary and taking into account public familiarity with technologies.

Moreover, the government strategy requires a significant contribution from IT resources.

3. PROJECT AND SPECIFIC OBJECTIVES OF THE PUBLIC CURATOR OF QUÉBEC'S PROTECTION MISSION

Under the *Public Curator Act*, the CPQ has two missions. Since the scope of this project covers its Protection services, let us begin with a review of this mission.

3.1. MISSION

The Protection segment of the mission statement of the CPQ reads as follows:

“At the Public Curator, we oversee the protection of citizens unable to take care of themselves, through measures appropriate to their condition and situation. We ensure that all decisions affecting their well-being and property reflect their best interests, respect their rights and safeguard their autonomy. We provide information to the public and to those with responsibility for their care, promoting awareness of the protection required by incapacitated people.”

This statement serves as the frame of reference for the restructuring project and the starting point for the reconsideration and analysis of needs.

3.2. OBJECTIVES OF THE PROTECTION SEGMENT OF THE CPQ ARCHITECTURE

In general, the architecture must achieve the following objectives:

- define a shared vision of what the organization will be in 2006;
- state the principles on which the target architecture is based;
- define a flexible organizational framework that will enable Protection to reflect changes in its environment;
- plan the integration of all systems, infrastructures, support services and support processes of all the business needs of the Protection mission, as well as the specific needs of certain units (Accounting, Internal Audit) that interface with “Protection.”

4. APPROACH: VALUE MANAGEMENT

In 2002, in response to the application of the *Public Administration Act*, the Treasury Board offered the ministries and organizations a development guide for an electronic public administration model, known by its French initials as AEG, for the Business, Information and Applications segments. This is a general process for transforming the government apparatus in order to improve customer service. Concretely, the Business segment of the AEG offers an approach that puts the expectations of individuals and organizations at the centre of the vectors of change within the Quebec government.

Needs are stated as the main components of the definition of the service to be offered. This then leads to modeling the services that will determine what adjustments are required for the organization and for the processes that support the service offering.

A management approach called “Value Management” offers a methodology based on goals (missions, purpose) linked to the needs to be satisfied and combined with optimum solutions to deliver the best value to the stakeholders (government, CPQ employees and clients). That is why the CPQ decided to base its reorganization on this approach. Moreover, since it brings in the operational resources of the organization through bottom-up consultation, it would make it possible to do a better job of change management.

5. PRINCIPAL PARTICIPANTS AND THEIR ROLES

The basic resources (designated by the various CPQ units) made their contribution by first being initiated into the principles of value management and then being assigned to seven teams, formed to execute each of the stages of the project.

An eighth “integration” team, consisting of management personnel from the Protection mission, was responsible for reviewing the work of the basic teams and integrating the recommendations before presenting them to the various levels for approval. Finally, a ninth team was responsible for identifying opportunities for quick improvements and proposing projects to the management committee.

In addition to administrative and operational units of the Protection mission, the following units were involved:

- Planning;
- Legal Services;
- General Administration;
- Complaints Office and Communications;
- Internal Audit;
- General Secretariat and Policies.

As a result, more than one hundred people, or nearly one third of the Protection staff, gave time to participate in workshops and comment on reports. This represents a total effort of about eight person/years over a 12-month period.

6. WORK PLAN OF THE TEAMS

The table below shows the work plan for the various phases of the project and the corresponding deliverables:

Phases:	Deliverables:
1. Initiate the work	• Work schedule • Project team mobilization
2. Define the needs	• Performance criteria
3. Identify optimal concept	General architecture • Needs freeze • Concepts freeze
4. Execute the preliminary concept	Detailed architecture • Policies and business rules • Organization chart (roles & resp.) • Implementation and training
5. Execute detailed concept	• Systems • Directives • Training tools • HR integration plan
6. Implementation	• Revised and functional organization

7. STEP ONE: ARCHITECTURE OF THE CPQ PROTECTION MISSION

7.1. NEEDS ANALYSIS AND PERFORMANCE CRITERIA

To properly understand the bases for the general operation of the Protection mission, we used a functional model that uses the basic mission to define the first-level actions to which the strategic intervention level corresponds.

The second intervention level is the management or work processes level. The third or operational level consists of all the activities to be carried out to satisfy the needs.

7.1.1. FUNCTIONAL NEEDS MODEL

The following table shows the first two functional modeling levels.

1st level: Strategic	2nd level: Management
1. Launch adequate measures	1.1 Define the involvement of the CPQ with respect to instituting protective supervision or other actions
	1.2 Process a warning or any other situation requiring clarification
	1.3 Process a request for consent to care outside protective supervision
	1.4 Close one (or more) jurisdiction(s) or end a motion to institute protective supervision
2. Supervise the representation of persons under private supervision	2.1 Assist tutors, curators and tutorship councils
	2.2 Ensure that the obligations of tutors and curators are respected
	2.3 Intervene in case of improper performance of obligations (excluding reports)
3. Ensure the well-being of persons under public supervision	3.1 Know the person and his/her assets
	3.2 Involve the person
4.	3.3 Respond to bio-psycho-social and/or material needs
	3.4 Ensure the exercise of his/her civil rights and responsibilities
The above functions require community collaboration to facilitate their execution and client service. That is why such collaboration is considered just as strategic as the first-level functions.	
Obtain community collaboration	This strategic function contains all activities designed to systematize our relationships with our community partners: - Identify opportunities - Negotiate agreements - Manage the agreements - Etc.

This model thus illustrates the Protection obligations in terms of the goals to be achieved. It should be seen as an evolving management tool that will adapt to changes observed in the CPQ environment.

The challenges inherent in Protection are part of the model. On the one hand, Protection requires maintaining a personalized relationship with thousands of individuals. This mission cannot be accomplished once for several persons but rather several times for each person.

On the other hand, protection of individuals cannot be separate from the management of their assets. The well-being of individuals must be viewed in the context of their life expectancy. Accordingly, it is necessary to assure their well-being not only in the present but also in a longer term perspective.

7.1.2. PERFORMANCE CRITERIA / PERFORMANCE REQUIREMENTS

A functional model cannot be complete without identifying the performance levels expected when operational functions are executed. Thus, performance criteria are associated with the functionalities described above. They are summarized in the following table:

PERFORMANCE CRITERIA GRID

Functions / processes	Sub-functions / Activities	Outputs	Performance criteria	Flexi- bility
1.1 Define the involvement of the CPQ regarding a motion to institute protective supervision or other involvement			60 calendar days	F1
	1.1.1B Analyze the information received		5 business days	F0
	1.1.2B Advise on the form of protection (persons of full age)		5 business days	F1
	1.1.3B Validate the involvement of the CPQ with a minor 1.1.3.1B Analyze the documents launching the process	Processing: - Notices - Minutes	5 business days 3 business months 15 minutes to 10 business days	F1 F1 F1
1.2 Process a report or other situation requiring clarification		Decision	24 hours to 2 business days	F0
	1.2.2 Formulate the action plan		5 business days	F0
	1.2.3 Apply the action plan		10 business days	F0
1.3 Process a request for consent to care not involving protection			< 48 hours	F0
1.4 Close one (or more) jurisdiction(s) or end a motion to institute protective supervision				
	1.4.1 Establish a transition plan to transfer of assets		30 calendar days	F0
	1.4.2 Prepare the final account		0 to 60 calendar days	F0
	1.4.4 Return the administered assets		20 days to 6 calendar months	
	1.4.5 Examine the final account		20 business days	F1
2.1 Assist tutors, curators and tutorship councils				

Functions / processes	Sub-functions / Activities	Outputs	Performance criteria	Flexi- bility
	2.1.1 Inform the legal representatives/tutorship councils of their roles and responsibilities		20 business days	F0
	2.1.2 Answer requests from tutors, curators and tutorship councils		15 minutes to 10 business days	F0
2.2 Ensure respect for obligations by tutors and curators				
	2.2.1 Ensure the existence of the tutorship council		6 calendar months	F1
	2.2.2 Examine the inventory		1 calendar month	F1
	2.2.3 Audit the annual reports		40 business days	F1
	2.2.4 Review motions, notices, judgments and other documents besides those seeking to institute protection	Verification	3 business days maximum	F0
	2.2.5 Track (process) other proceedings		As soon as review is concluded	F0
	2.2.6 Check that the security complies with the decision by the tutorship council		10 business days	F1
	2.2.7 Make sure that the curator or tutor obtains reassessment of the protective supervision of the represented person	Verification	10 business days	F1
2.3 Intervene in cases of improper execution of obligations			Maximum 25 business days	F0
	2.3.2 Prepare an action plan to ensure protection of the person and their assets		10 business days	F0
	2.3.3 Apply appropriate intervention measures		15 business days maximum	F0
3.1 Know the person and their assets and 3.2 Involve the person		Meeting	30 calendar days	F0
	3.1.1 Prepare the initial general portrait of the person		30 days to 1 calendar year	F0
	3.1.2 Visit the person		30 days + frequencies (CdCF)	F1

Functions / processes	Sub-functions / Activities	Outputs	Performance criteria	Flexi- bility
3.2 Involve the person				
	3.2.2 Inform the person	On a given date	Real-time access	F0
	3.2.3 Report to the person	On a given date	Real-time access	F0
3.3 Respond to bio-psycho-social-spiritual and/or material needs				
	3.3.1 Plan the response to needs (temporary, short term, long term)	Initial Plan Global Plan	15 days 60 days maximum	F0 F0
	3.3.4 Revise the representation plan (person and property)	From actuating factors	30 calendar days	± 15 days

F0 = Obligation to meet or respect the performance criterion

F1 = Tolerance of failure to meet performance criterion

7.1.3. SUMMARY DIAGNOSIS BY FUNCTION

The following table shows a summary of the diagnosis made in June 2002. This diagnosis has been updated from conclusions of the organizational analysis of 2003. The description is by function (based on the function tree of June 2002).

Functions of Protection division	Problems
1. Intake	▪ Lack of systematization in warning report and consent to care (outside protective supervision) processes ▪ Loss of information if protective supervision is instituted for persons who have already been the subject of a report or a consent to care procedure. ▪ Lack of rigor and integrity in the transfer of information on the person from intake to representation or supervision. ▪ More information than necessary is gathered in the institution phase. Lack of rigor in its handling. ▪ Documents enter at various different locations (receiving function). ▪ Major delays between the issuance of a court judgment and its receipt at the CPQ clerk's office. ▪ Many files are processed for intake when they should be refused at the outset. ▪ Nominative data on the person is not reliable. ▪ The investigation process is too long. ▪ Reaction is not fast enough to prevent abuse in intake phase (especially for the supervision of minors).
2. Supervise the representation of persons under private supervision	▪ The supervision level, both for the management of property and the person, needs to be defined. The roles of the various parties involved with the persons under private protective supervision need to be clarified (CPQ vs legal representative vs tutorship council). ▪ The processes associated with assistance to private tutors and curators must be reinforced. ▪ Control measures and procedures are required to properly perform the work and offer an acceptable performance level.

Functions of Protection division	Problems
3. Represent the person under public supervision	▪ The representation level needs to be defined to ensure the relevance of actions and the quality of services. The principles of precision, security, speed and compliance must be questioned in relation to the service level offered. ▪ The work processes are not all documented and are not harmonized among the regional offices (DTs). ▪ The service architecture constitutes the base for the revision of the processes. ▪ The problems perceived at the interfaces between the DTs and the Property Administration Division (DAP) and between the intake and representation personnel require clarification of roles and responsibilities and work methods. ▪ There is a substantial shortage of tools for DAP but also for the intake and representation counselors. Some processes are too complicated (e.g.: payment of invoices to suppliers, weekly deposit of cheques). ▪ Control measures and procedures are required to properly execute the work and offer an acceptable service level. Denial of assurance for CPQ financial statements must end. ▪ Maintaining parallel files complicates file searches and the sharing of information. It also generates serious problems for respecting the law on protecting personal information. ▪ The notes in the record are poorly structured and practices are not standardized from region to region. ▪ The SUN system functions have not all been developed. Moreover, certain resources have not been trained to exploit the full potential of the current system.
Develop agreements with community partners	▪ The involvement of the Protection Division (DGP) in this function must be reinforced. ▪ There should be better knowledge of the resources available, more active participation in social debates, better training and informing of partners so that they can help us better meet the target performance criteria. ▪ A better structured Director General's Report would help reduce errors and delays. Ultimately, it would be good to receive the input electronically.

7.1.4. ISSUES

From the preceding analysis, we adopted five elements for the CPQ to use in structuring the development of its target architecture. They affect the needs analysis and help clarify the organizational development issues.

These issues are:

1. The integration of all actions seeking to define some form of intervention, including the concept of intake.
2. Involvement before private protective supervision is instituted.
3. Emphasis on assisting legal representatives and tutorship councils.
4. Maintenance of knowledge.
5. Planning the response to needs is the link between the individual and his property.

8. STEP TWO: GENERAL ORGANIZATIONAL CONCEPT (BUSINESS SEGMENT)

8.1. THE SIX GENERAL ARCHITECTURAL PRINCIPLES

The principles that were applied to designing the solution adopted appear in this section and constitute the basis of the business strategies of the Protection mission, so that it can pursue its reorientation and systematize its action and influence in the community.

1ST PRINCIPLE: CONTINUATION OF THE REORIENTATION ON THE INDIVIDUAL

This principle is already being applied by the Protection mission. The target architecture seeks to intensify this basic orientation of the organization of the work by *creating synergy within the organization that will benefit the clientele*. The incapable person is the primary concern of the organization.

2ND PRINCIPLE: THE INDIVIDUAL AND HIS PROPERTY FORM AN INDISSOCIABLE WHOLE

Our actions must be based on an integrated vision of these two aspects. Applying this principle means that there must be certainty that actions occur as part of an integrated representation plan.

3RD PRINCIPLE: PROTECTION MUST GUARANTEE SOUND ASSET MANAGEMENT

Protection must ensure rigorous and forward-looking management of assets for the purposes they have now acquired, i.e. to provide the income necessary to meet the needs of individuals within their means. Accordingly, the role of trustee becomes meaningful as part of the integrated representation plan in order to guarantee this rigor and maintain a healthy tension between individual needs and the use of their assets.

4TH PRINCIPLE: THE DELEGATE AND THE CLIENT REPRESENTATIVE: FIRST-LINE INTERVENERS INVESTED WITH THE AUTHORITY OF THE CPQ AND THE SOLE INTERFACE WITH THE CLIENT

The quality of services is reflected in action, structured by the representation plan of the delegate and client representative, who are the first-line CPQ interveners. The organization and the systems invest them with the authority, means and expertise of the CPQ so that they can exercise their client service functions. A single person serves the client.

5TH PRINCIPLE: THE PROTECTION ACTIONS AFFECTING AN INCAPABLE PERSON ARE COORDINATED

The efforts to satisfy the person's needs and use his assets are in a dynamic relationship that changes over time. Accordingly, the **delegate** and the **trustee** together prepare the integrated representation plan, which becomes their framework for action.

6TH PRINCIPLE: SYNERGY DEPENDS ON KNOWING THE INFORMATION

Protection of an incapable person depends on knowledge of that person. What makes this even more critical is that several individuals interact for the good of the incapable person. That is why quality, completeness and availability of the information are the core of the service provided.

8.2. DESIGN CRITERIA FOR THE ORGANIZATION: THE VALUE FRAMEWORK

8.2.1. THE STAKEHOLDERS

To properly support the organization in its purposes and ensure that there is value produced for the stakeholders to whom the CPQ must deliver results, senior management developed a value framework. It became the reference for the design and evaluation of proposed solutions of all kinds to respond to stakeholder expectations and meet the corresponding performance criteria.

To develop the value framework for the CPQ, four stakeholders were used:

- The client, who is the incapable person under public supervision or the legal representative and tutorship council under private supervision;
- The community agencies that interact with the CPQ in implementing the CPQ service, such as ministries (Health, Justice, etc.), local governments (municipalities, various departments,) etc.;
- Public Authorities, which represents the government entity on which the CPQ depends and to which it ultimately is responsible for its actions;
- Personnel, in the CPQ employees who serve the client, is the first-line CPQ intervener in contact with the client.

8.2.2. CRITERIA ASSOCIATED WITH THE STAKEHOLDERS

The criteria selected for the stakeholders are the following:

CLIENT SERVICE

- Proximity to the client
- Vigilance – efficacy in client service
- Integrity in client service
- Adaptation to the specifics of the client

PUBLIC AUTHORITY

- Efficiency– efficacy for public authorities
- Accountability of the public authorities, including citizens
- Secure environment
- Contribution to the development of Quebec society

INTERVENERS AND COMMUNITY ORGANIZATIONS

- Credibility of those working at the interface with community organizations
- Quality of the interfaces with the community organizations
- Respect for commitments and deadlines of partner agencies
- Respect for the respective roles and responsibilities of the CPQ and the community organizations

PERSONNEL AS CPQ INTERVENERS IN CLIENT SERVICE

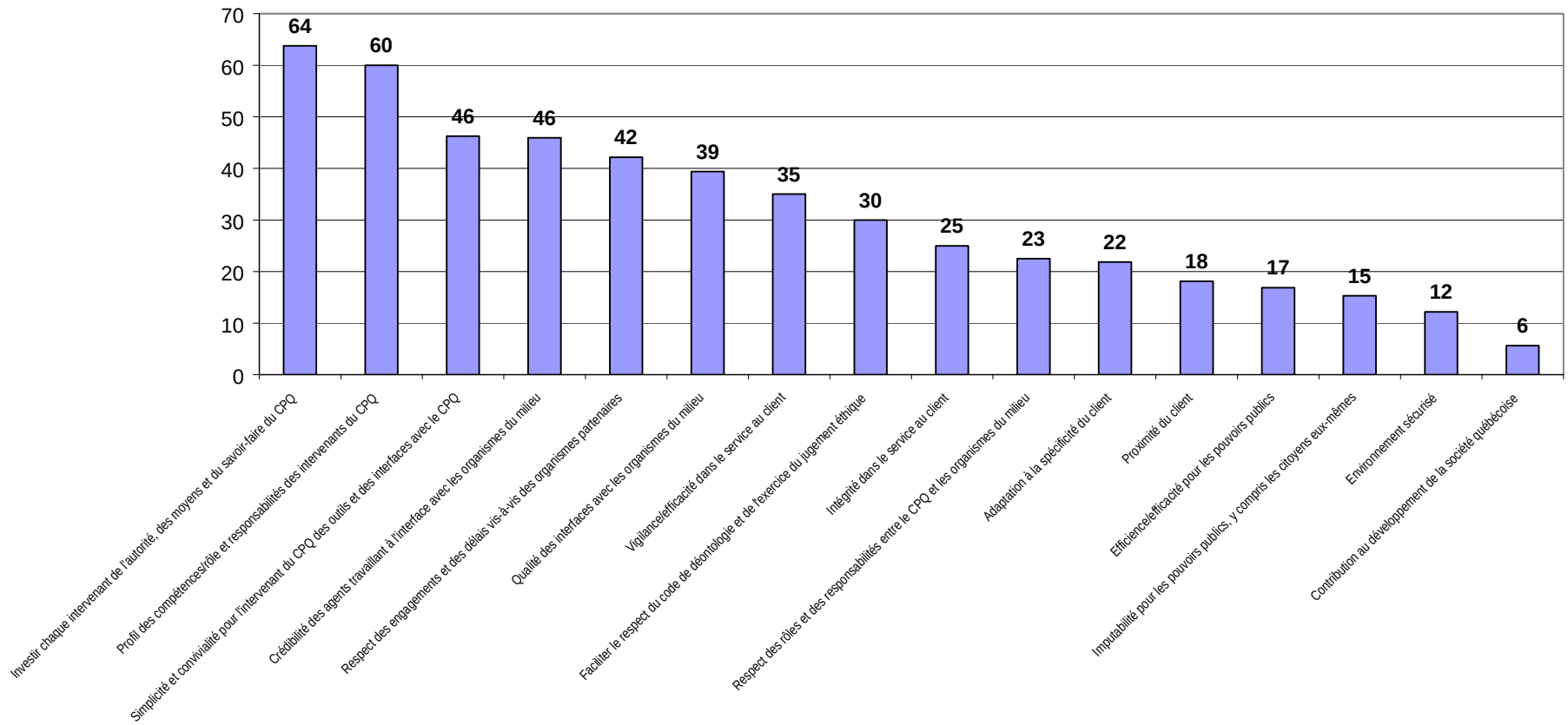
- Skills profile / roles and responsibilities of CPQ interveners in client service
- Invest each intervener with the CPQ authority, resources and expertise to exercise their client service functions (“*empowerment*”)
- Facilitate the CPQ intervener’s respect for the code of ethics and exercise of ethical judgment in client service
- Simplicity and user-friendliness of CPQ tools and interfaces for the CPQ intervener.

8.2.3. THE VALUE FRAMEWORK

The criteria ranking and weighting result in the classification illustrated on the following diagram, entitled “Value Framework – Organization”.

Référentiel de valeur - ORGANISATION

2003-03-20



9. BUSINESS PROCESSES

9.1. THE SERVICES DOMAIN

Services describes the three major and fundamental actions (or business processes) that the CPQ must execute to perform its mission and respond to the needs of its clientele. A business process is the way the CPQ delivers its products and services to its clientele or the way in which it produces one or more results to ensure the proper conduct of its affairs.

A business process can be seen as a sequence of business events, each of which has as the objective to deliver concrete results (intermediate or final) to the client or the organization. Below, the **service offering** of the Protection mission of the CPQ is presented with a brief narrative description.

A detailed description of the processes is available in a deliverable entitled “target process architecture,” which specifies the main launchers of the inputs required to start the processes and the results for the process outputs.

9.1.1. BUSINESS PROCESS 1: “LAUNCH APPROPRIATE STEPS”

In the context of process optimization, the CPQ has combined in a single business process all the activities intended to launch appropriate measures for instituting or ending protective supervision or to respond to a situation of risk for persons assumed to be or declared incapable.

The purpose of this process is to:

- Determine if it is appropriate to institute protective supervision;
- Decide if the CPQ must act in supervision;
- Intervene if appropriate following the receipt of a report, a request for consent to care or a legal proceeding;
- End jurisdiction or supervision that is in the process of being instituted.

9.1.2. BUSINESS PROCESS 2: “SUPERVISE THE REPRESENTATION OF PERSONS UNDER PRIVATE SUPERVISION”

This process consists mainly of assisting and supervising the legal representative and tutorship council in performing their representation tasks for the incapable person under a private form of protective supervision. Among others, the responsibility of the CPQ can be summarized as **making sure** that the legal representative and tutorship council know and perform their obligations to the person, **assisting** them as necessary in the performance of their obligations and **intervening** in cases of improper performance of their obligations.

9.1.3. BUSINESS PROCESS 3: “ASSURE THE WELL-BEING OF PERSONS UNDER PUBLIC SUPERVISION”

This service consists of representing the incapable person and acting on their behalf in all facets of their life. Such representation involves making decisions and taking actions in their interest, with respect for their rights and the preservation of their autonomy. Proper representation of an incapable person requires detailed knowledge of the person and their needs. Such knowledge, which is the very core of representation, is obtained by maintaining a personalized relationship with the person, their family and their friends.

9.2. LINKS WITH CLIENTS AND THIRD PARTIES

These major administrative actions result in relating CPQ clients and the third parties who assist in providing services. These links are described in detailed work processes.

The clientele for Protection can be subdivided into five categories:

Clients				
Citizens	Incapable persons	Legal representatives	Tutorship council	Interested parties

The third parties are entities that contribute to providing services jointly with the CPQ, as partners, suppliers or delegates (community agencies, owners, public utilities, Office for Disabled Persons, cities, etc.).

In the business architecture, the third parties are subdivided into four sub-groups:

Third parties			
Family and friends	Partners	Delegates	Suppliers P/S persons

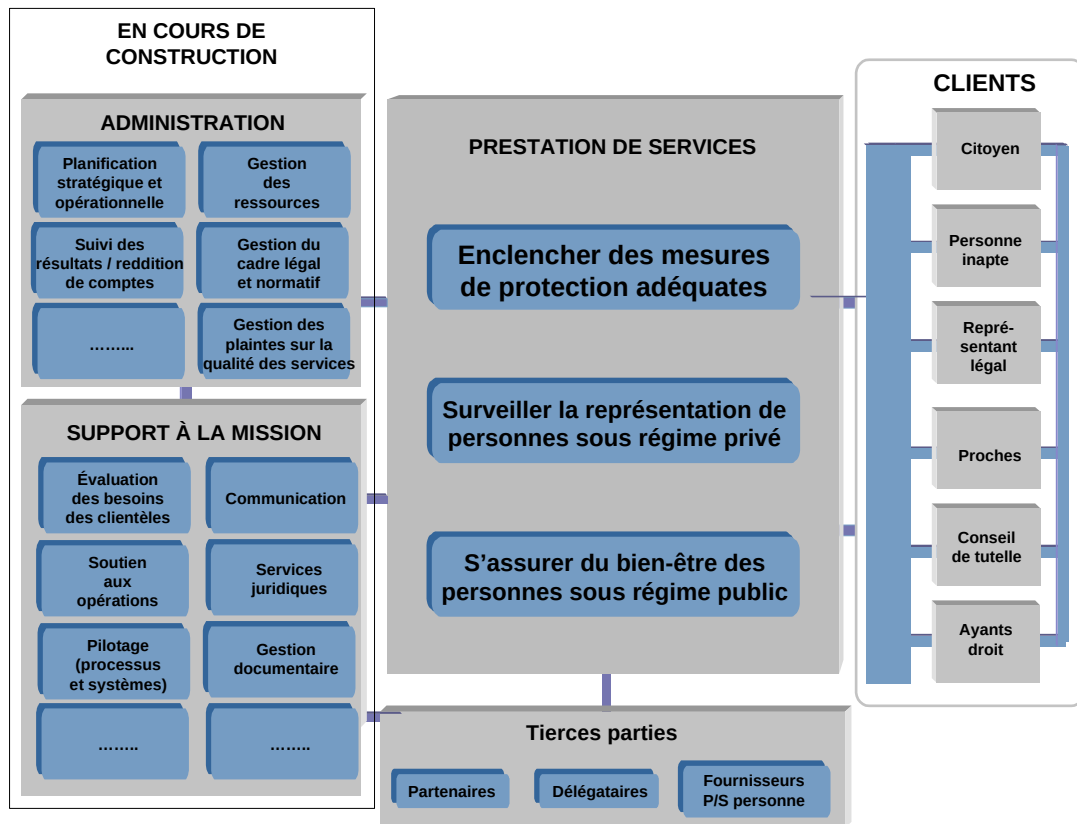
10. TARGET ORGANIZATION

10.1. BUSINESS MODEL

The “Launch appropriate steps,” “Supervise the representation of persons under private supervision” and “Assure the well-being of persons under public supervision” business processes create relationships among the clienteles, partners, delegates and suppliers. These relationships are generated by business events that launch a sequence of service activities (sometimes electronic) of two types: activity type or stage-of-life type.

These events are distinct in their organizational structure, location, geographic dispersal and individuals. The following diagram shows the various high-level components of the business model in relation to its clients, support and administrative functions and the third parties involved in delivering the service.

BUSINESS MODEL
PROTECTION MISSION
CPQ

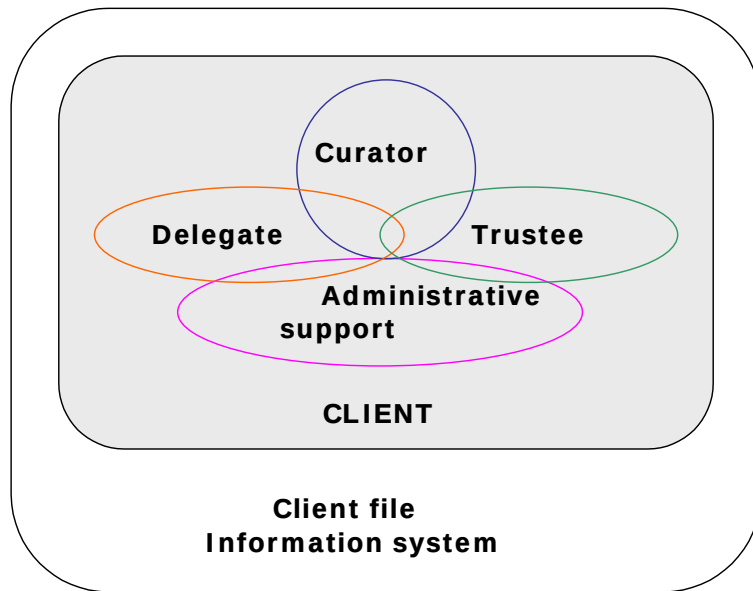


10.2. THE ORGANIZATIONAL MODEL AND MAIN ADMINISTRATIVE FUNCTIONS

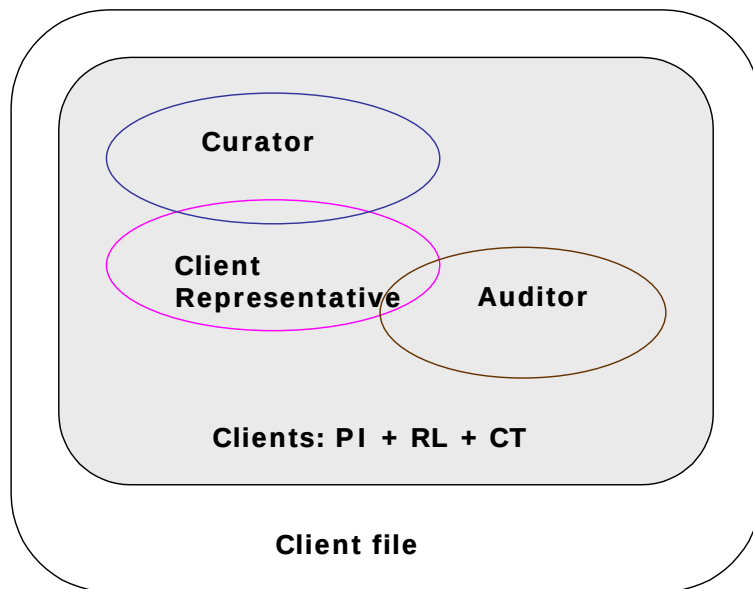
Based on the previous statements, the proposed solution can be represented by various levels of intervention.

10.2.1. FIRST LEVEL OF INTERVENTION

SERVICE TO THE PUBLIC



SERVICE TO PRIVATE



Once the judgment has been obtained, the first level of intervention represents the first level of interveners with the client. In the case of public forms of protective supervision, the client is the incapable person and their immediate friends and family, while for private forms, the clients are the incapable person, their legal representative and the tutorship council.

Under the law, the responsibility for the protection of incapable persons and their property belongs to the Curator personally. However, given the number of clients and the nature of the daily activities, for those with public supervision, the Public Curator delegates first-line activities to two principal interveners “**delegate**” and “**trustee**”. They constitute a pair that shares the actions, with the “well-being of the person” assigned to the delegate and “protection of the assets” to the trustee.

These two functions are complementary because the assets must serve to ensure the physical well-being of the individual within his means. As can be seen in the functional model shown above, joint and fundamental activities are associated with this pair. They are:

- Knowledge of the person and their assets; and
- Preparation of the representation plan accompanied by the annual budget.

To relieve these important interveners from administrative tasks and enable them to concentrate on their basic duties, they receive **administrative support**, with the responsibility, among others, to take care of:

- The payment of invoices;
- Response to questions about the client file;
- etc.

All the first-line interveners use a complete and accessible client file, which is the primary requirement of the information systems. The pair must also be “empowered with resources and expertise ...”; that is why they must also be supported with instruments and systematization.

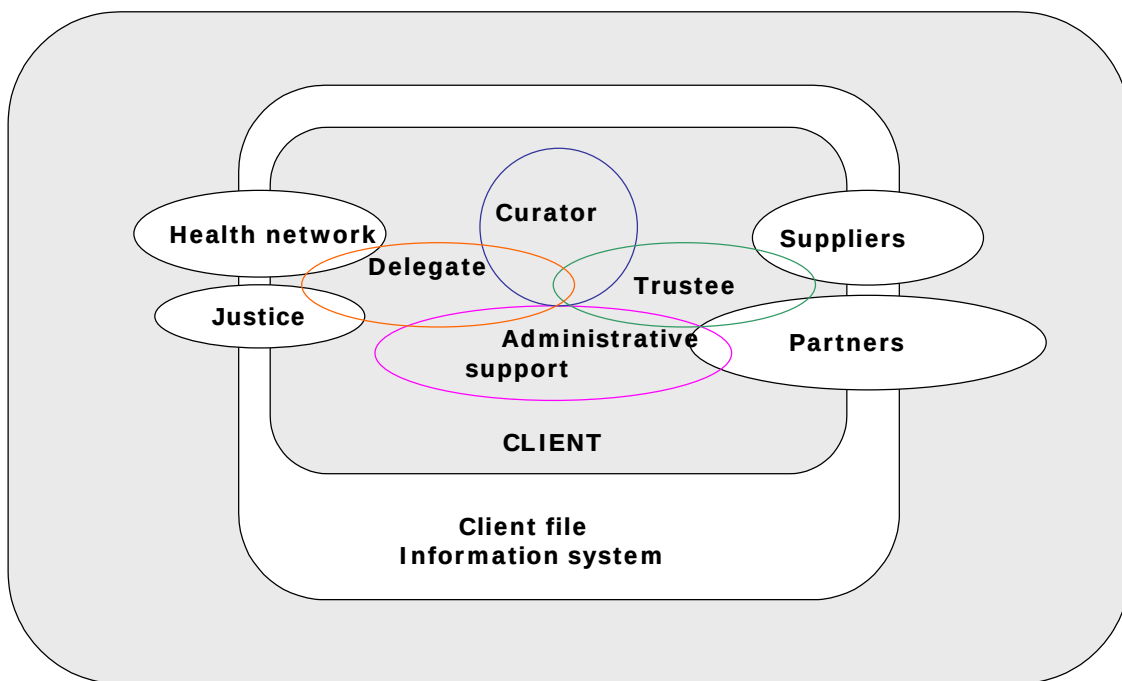
This first level is fundamental and represents the core of the reform. In fact, it expresses the first criteria of the reference value, by:

- investing each intervener with the authority, means and expertise of the CPQ;
- allocating the roles and responsibilities by competence;
- making CPQ tools and interfaces simple and user-friendly.

10.2.2. SECOND LEVEL OF INTERVENTION FOR PUBLIC FORMS OF SUPERVISION

This value criterion provides the link with the second level of intervention that relates the CPQ interveners and third parties. It directly concerns the interface with the community, a strategic function of the service offering.

INTERFACE WITH THE COMMUNITY



In fact, there are community agencies around these interveners, supplying input in some cases for the CPQ (e.g.: DG report, consent to care request), or partners in providing health care services (CLSC social worker) or income (RRQ). However, they receive outputs from the CPQ process (e.g.: payments for housing, cheques for personal expenses, etc.).

To ensure that the actions are effective, daily interactions with the community agencies result in the necessity of:

- Negotiating agreements;
- Maintaining good relations;
- Tracking the client file;
- Harmonizing practices;
- Exchanging information, documents and services, etc.

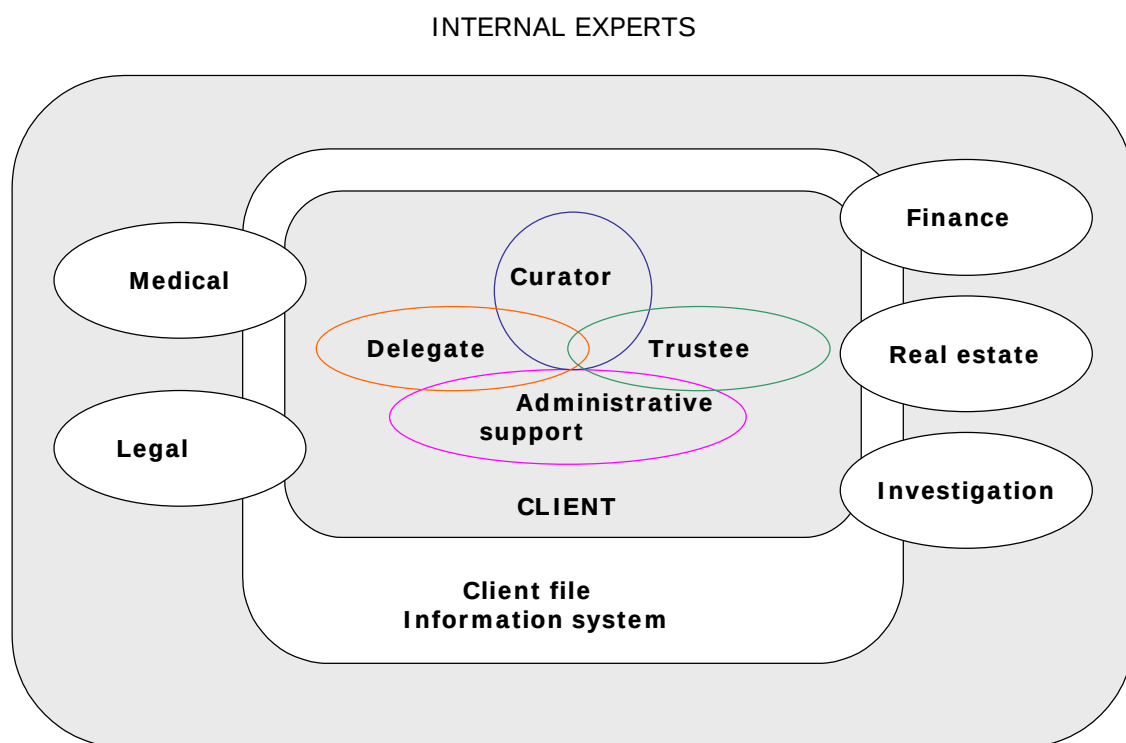
These constitute links that must be systematized so that the CPQ can transfer its internal synergy outside the organization and thus benefit from the support potential available from other ministries and community organizations.

10.2.3. THE THIRD LEVEL OF INTERVENTION

The two previous levels constitute the nucleus of the first-line intervention with the client, but a third level of expert intervention assists the first pair by providing advanced expertise for solving specific problems and providing decision assistance in cases where the management structure does not offer the needed framework.

Thus, if the first-line interveners are properly aligned with their basic function and well equipped to perform better, they will be:

- Credible agents with the community organizations;
- Quality interfaces because properly equipped;
- Respectful of commitments and deadlines that concern them.



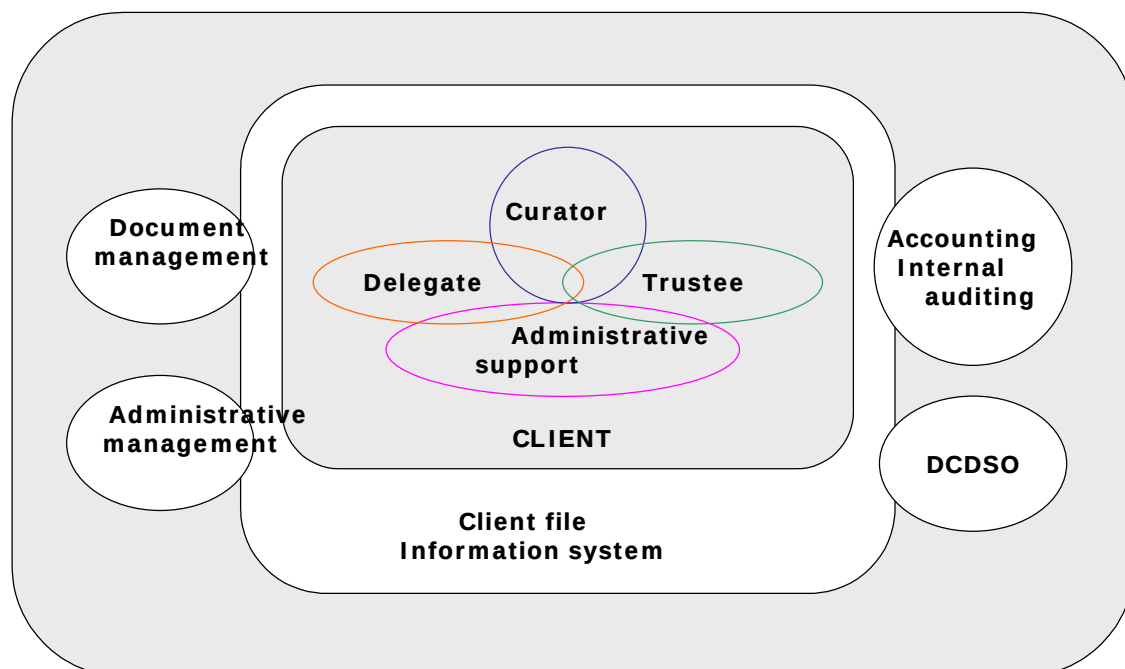
This results in vigilance and efficiency in client service. The successful implementation of the organizational or business model must enable the interveners to act in full integrity with clear and acknowledged support, respect for the distribution of internal and external roles, adaptation to the specifics of the client and by doing so, be properly distributed by client type. The result will be a sense of proximity for the client.

10.2.4. THE FOURTH LEVEL OF INTERVENTION

To support all these client service activities, tools and operational support must be provided by a fourth level, which involves internal management actions.

These include final accounting to government bodies and tracking the efficiency of the new organization, as indicated from the benefits analysis and the value of such a model.

INTERNAL MANAGEMENT MODEL TO SUPPORT THE MISSION



10.2.5. COMPLEMENT TO SERVICES FOR PRIVATE SUPERVISION

As illustrated on the first level, in the case of private supervision, the model is simple and reflects a first-line intervention by the CPQ that is much more flexible compared to public supervision. However, greater vigilance is required in the intake phase to prevent abuse and also reduce the number of supervisions instituted that do not need to be.

As for the solutions identified in the “institution of supervision” phase, the issues involve receiving documents (inputs) in virtual mode and the convergence of all CPQ intervention launchers in the “Launch” business process. This concept thus offers a broader vision of intake. Preparing files for all intervention requests not involving supervision (reports, consent to care, etc.) is a key element in increasing efficiency, should supervision be instituted later.

As for ending jurisdiction, this process requires a special skills profile, involving accounting and financial analysis skills.

11. CONCLUSION

In step 1, Value Management and the functional model have enabled the managers to:

- o Share their vision;
- o Reorient the organization;
- o Translate objectives into actions;
- o Mobilize personnel.

In step 2, bringing into perspective client needs, the CPQ Act and Civil Code requirements, the Protection mission and the definition of design criteria that result from the organizational values has made it possible to develop a value framework to orient the choices of organizational concepts. They basically concern:

- The description and rigorous implementation of the roles of delegates/trustees and support;
- Optimization of the DAP;
- Batch processing of certain transactions;
- Systematization of expenses and collections;
- Systematization of community relations.

The proposed organizational model applies whatever type of organization is in place and adapts to its context because it focuses on client service provided by well supported interveners. It is thus flexible in application and can be adapted to regional peculiarities.

The value management approach has enabled CPQ managers to move toward the most optimal solution, given the context and constraints prevailing during the analysis.

For the future, the transfer and learning that occurred during project execution have resulted in making the CPQ equipped and able to adapt the solution to reflect changes that will affect the organization, depending on how the environment with which it interacts develops.