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***“Influence of the Contexts and Associative Organisation on the  
Implementación of a Follow-up System of Users’ Itineraries”***

*Jean-Pierre MULLER, Anne PERETZ*

**Jean-Pierre MULLER**

**Anne PERETZ**

Adapei de Besançon

81 rue de Dole

BP 51913

25020 Besançon cedex 7

France

aperetz@adapeibesancon.asso.fr

**Abstract:** Define and mutualise the conclusions linked to the place and influence of the contexts (external) and organisation choices (internal) on the development and implementation of an observatory of handicapped people, online system of administrative information, and of the individual process of their socio-professional integration itinerary.

## **1. PRESENTATION OF THE WORKS IN PROGRESS AND OF THEIR OBJECTIVES**

The processing of the asked question is fed within the adapei of Besançon by the observation and analysis of four experiences, either internal or led in partnership, of design and implementation of observatories of insertion itineraries of handicapped people, cooperative tools of evaluation firstly in network and then online.

These tools firstly aim at memorizing the users' situations and the actions that are linked to them and at allowing an objective observation of their characteristics, also imposed as means to quantitatively and qualitatively evaluate the itineraries evolution and the quality of the care plans, in relation with the individually determined objectives (for each user) or the collectively determined ones (for a structure, an activity sector or the whole association).

This issue, which is in the heart of the adapei of Besançon present, is being processed in several external and internal framework: legal, financial, normative, participative. The partial conclusions remain linked to the present phase of the development of a final tool called OSUA (1000 users are concerned).

## **2. PRESENTATION OF THE CHARACTERISTICS AND CONSEQUENCES OF THE (EXTERNAL) CONTEXT REQUIREMENTS**

### **2.1. Legal context: law 2005-102 called «law handicap»**

It details the framework of the equal rights and equal opportunities, of the handicapped people participation and citizenship by answering three objectives:

- Guaranteeing to the handicapped people the free choice of their own life project thanks to a compensation of the consequences of their handicap and a life income that favours an autonomous worthy life.
- Allowing them an effective participation to the social life thanks to a city organisation according to the accessibility principle.
- Putting them in the heart of the devices that concern them, by replacing an administrative logic by a service one.

Until today, that is to say three years after the adoption of this law, all the decrees linked to it are not published yet.

### **2.2. The associative policy answering the law**

#### ***2.2.1. The associative project***

To meet the law spirit, at a first global level, the adapei of Besançon drafted an associative project that details its policy, it indicates:

- values that are shared by all the structures of reception and care plans of the association as regards the users (paper and role of the handicapped person within the

Society, rights recognized to any person, citizenship, search for autonomy and equal opportunities)

- services projects, whatever the concerned activity sector, to meet needs at all the life ages and to guarantee a global individual project...
- its ambition to provide a quality performance by a dynamic management of human resources, a continuous improvement step and a commitment in research, innovation and communication
- the implemented evaluation method, whilst respecting the texts that define the persons' rights, in conformity with the law 2002-2 and with the orientations adopted in general assembly, by taking into account the users', financial backers' and staffs' satisfaction.

### ***2.2.2. The establishment project***

Moreover, in a second level that is specific to each activity sector, establishments' projects are drafted.

They are inscribed in an improvement process of the social and medico-social offer as at the external as at the internal level, by describing according to the law terms their adhesion to:

- a quality step
- a changement dynamics
- a participative step
- a prospective and strategic vision
- a global and coherent approach with the social and medico-social organisation.

### ***2.2.3. The Beneficiary Accompaniment Project (B.A.P.)***

Lastly, at the user's individual level, the association designed an accompaniment method also to meet the law orientations: any person who has a handicap and who integrates one or several structures of the adapei of Besançon, benefits from the implementation of a personnalised global accompaniment project.

Transversality and global aspect of this project require a coordination function so as to guarantee the coherence of the actions offered by the reception structure(s). Whilst taking into account the specific involvement according to the activity of each activity sector the cared person benefits from, it is the sector in charge of the social follow-up of the beneficiaries that is in charge of the coordination of the global B.A.P.

The BAP includes three main phases:

- an observation time,
- a period of project drafting,
- its implementation.

This method includes regular questioning that allow adapting the actions that were initially decided.

### **2.3. The law 2002-2**

It renovated the social and medico-social action in France and deeply transformed the organisation and functioning rules of the establishments and social services; it appeals to financing from the public community.

Its main dispositions are to:

- Guarantee the rights of the social and medico-social institutions users’;
- Adapt the mission of the social and medico-social action to the society evolutions;
- Improve the management modalities as the medico-social planification, the authorizations system as well as the coordination of the social and medico-social actors.

Indeed, the law 2002-2 determined new rules linked to the persons’ rights by reasserting the users’ preponderant stead; it wants to promote their autonomy, protection and the exercise of their citizenship.

This law, which includes 87 articles, requires many application texts, even if many dispositions are immediately applicable. Until today, that is to say almost 6 years after the law adoption, all the decrees linked to it are not published yet.

### **3. THE EVALUATION OBLIGATION AND NEED**

These two laws, as well as the political choices of the association, imply a systematisation of the individual evaluation of the users’ itineraries or of the institutional practices, of the financial management of the establishments but also of the person’s real needs...

A «National Guide of the Internal Evaluation» was drafted by the French National Commission of the Social and Medico-Social Evaluation; it details that by January, the 1<sup>st</sup> 2009 the establishments should produce the results of their internal evaluation, and by January, 1<sup>st</sup> 2011 the results of an external evaluation.

Four missions of the association are evoked, they represent the fields to be internally evaluated and which heart is then detailed through 15 functions to deal with, what shows the depth and the complexity of the system to be implemented to reach an evaluation that is useful to get the objectives determined by the laws. They are the following elements:

- the establishments projects (in relation with the identified needs, the assigned missions, the project stead in its institutional organisation)
- the relations establishment/environment (integration in the territorial context, opening towards the environment, accessibility)
- the organisation of the establishment means (human resources, work organisation, environment, financial resources, information system)

- the beneficiaries' right and the provided performances (rights respect, users' and representatives' participation, personnalisation of the intervention, users' security and risks management).

Until today, and since the beginning of 2007, the works of the National Commission have been continued by a French National Agency, also called "Well-treatment Agency", more organised than the initial Commission.

It did not provide its complementary recommendations as regards the elements to be evaluated.

#### **4. PRESENTATION OF THE CHARACTERISTICS AND CONSEQUENCES OF THE (INTERNAL) ASSOCIATIVE POLITICAL CHOICES**

##### **4.1. Quality step and certification ISO 9001 version 2000**

To meet these constraints, the association made the strategic decision to internally implement a quality step on the basis of the reference ISO 9001: 2000, that aims at giving an organisation pattern of the resources, activities and means to continuously improve the users' and professionals' reception and care plans conditions and at giving to the wardship organizations a better visibility of the led actions.

The drafting of a quality step facilitates the evolution of the association in its environment by allowing it organising its policy based on evaluation, actions coordination and competences transfer in a common framework.

The certification ISO 9001 has been got for all the association since January 2007, thanks to the obtention of a certificate for each activity sector (6 sum-total).

As regards the systems organisation, the norm lists fields in natural relation with those that are imposed by the laws 2002-2 and 2005-102, especially in the framework of the internal evaluation obligation.

The need to have a global tool to gather and process data about the users is confirmed at this stage.

##### **4.2. Users, association professionals and external partners active participation**

If the association vocation is to bring the necessary help to the mentally handicapped people with the support of their family or representative, of a governing body made up by friends and parents, of professionals, the global quality step is the element that allows meeting these internal requirements that respect the legislative framework and more particularly the law 2005-102.

It demonstrates the association political will to include these actors in the association performances, functioning and innovation.

To manage this, a coordination, a decision body and a group of referents coming from all the association structures were created, they are in charge of leading the projects.

The strong involvement of these actors in the formation and personal reflexion at all the association levels allows leading to the formalisation of common or specific processes adapted to the practices reality and will be used as a basis for the internal evaluation.

This global and participative approach guarantees at the same time the respect of the handicapped people specificities and the reflexion cohesion at all the association levels.

The diffusion of the information about the projects progress in this direction (quality step and tools to gather and process data about the users and the led actions), and the users' formation are also essential resources in the implementation of these management tools.

#### **4.3. A management method of the association structures through actions budgetisation under Pluri-Annual Contract of Means and Objectives (PACMO) on a 5-year term**

The law 2002-2 introduces this new strategic tool of contractualisation between the reception structures of the handicapped people and the public financing organizations; it allows determining a global pluri-annual budget within a same association.

The PACMO is based on the associative and establishments projects, but also on the users' individualised projects that integrate the needs evaluation, the implemented means, the follow-up and adjustment modalities.

On these preliminaries, since January 2008 the PACMO will offer a visibility during several years to the adapei of Besançon, by determining in advance and on the middle and long term:

- Financial commitments,
- Quality objectives,
- Users' care plans criteria,
- Functioning modalities,
- Development prospects that take into account the cared people evolution, and consequently the association activities, the staff qualification, means...

The evolutions linked to legislation that are presently taking place, even in the medico-social sector in France, directly influence:

- the mode of users' care
- the institutions and associations management
- the relation with the control and ratemaking authorities, from a a priori control mode to a a posteriori one that is linked to the got results.

At these two levels, the evaluation step has become incontrovertible in relation with the determined objectives and from now on concerns all the association actors.

The implementation of a global tool to gather and process data about the users is confirmed as a necessary element to allow meeting these legal requirements.

## **5. CAPITALISATION, DEVELOPMENT, MODELLING OF THESE CONTEXTS IN OSUA (TOOL TO FOLLOW-UP THE ADAPEI USERS)**

The links between legislation, the ISO norm and the associative policy are incontestable as regards the individual and institutional evaluation, but also the need to formalise the led actions at all the levels and to manage the data that are linked to them, with the active participation of actors at all the association levels.

Consequently, the point is to mutualise the action for the users' well-being, to analyse the results and to forecast the consequences on the future care plans, on the basis of a unic work method and of a same complete and global tool to gather and process the information.

Since 2006, the annual quality outline plan of the adapei of Besançon has indicated all the elements that compose this step and its dynamic logic, by taking into account on the one hand:

- The association users' needs and expectations (users and families, public powers, control authorities and wardship organizations, professionals, activity sectors, partners)
- And the associative quality policy,

And on the other hand, elements that are logical consequences:

- The processes of resources management, of performances execution, of practices improvement to meet the needs and the policy,
- The regularly determined objectives for each of them,
- The indicators that allow emphasizing the got results in relation with the determined objectives,

...and this way, for the following period, improving the processes, determining new objectives, or even making the associative policy evolve...

From these organised data, dashboards per activity will be implemented, and then tuned, what required a quantitative and qualitative processing of the gathered information.

They will allow the follow-up of the activity and of the association evolution as an answer to all the association users' needs and expectations evolution, including of the users as regard their individualised life project and of the control authorities in the framework of the legal internal evaluation and of the PACMO.

OSUA, tool to gather data linked to the association users' follow-up and to the led actions is presently being written and meets all the listed frameworks and needs; it allows: memorising data and actions, exchanging information, producing individual and collective, quantitative and qualitative balances on which the professionnals will base their analysis of the users' and structures situation, and even the association one.

OSUA appears to be an associative tool that allows meeting at the same time the requirements of the laws 2002-2 and 2005-102 (individual evaluation for each user's

itinerary and collective evaluation for each entity that constitutes the association), the financial indicators of the PACMO follow-up and the quality indicators of the performances offered by the association to each user.

## **6. TAKING INTO ACCOUNT OF THESE ELEMENTS IN THE KNOWLEDGE ORGANISATION AND MANAGEMENT AND OF THE PROFESSIONALS' INVOLVEMENT, AND METHODOLOGICAL CONSEQUENCES**

### **6.1. Relations between the known evaluation elements and the OSUA tool**

The OSUA project has mobilised since 2005 a referents team and a steering committee represented by the association directions of the activity sectors on these issues, in a participative way.

As regards the form, we thought about formalising the links between the contextual requirements already quoted, the users' accompaniment practices and the actions evaluation ones and the architecture of the OSUA tool, during the 31 meetings that took place during a 2-year period.

The idea was to use a methodology of constant coming and going between the sectors ground practices, their modelling during meetings and work groups, the reference to the legislative and ratemaking framework and their transmission to the organization in charge of the writing.

In parallel, a transversal work had and still has to be made with all the association staff, on the basis of a written communication plan, that has a dimension:

- Of information, to make the staff knowing this future tool they will use and the context in which it is inscribed
- Of training, to use traditional data-processing tools
- Since the end of 2007, in relation with the finalisation of the tool writing, of training to use OSUA.

All these exchange occasions allow drafting a tool in relation with the reality of the accompaniment practices on the one hand and with the contextual requirements and constraints already evoked on the other hand.

### **6.2. Methodological consequences on the project progress**

During the 24 months of the OSUA project and all the almost six years that passed from the publication of the law 2002-02 and of its first degrees long, it is easy to pick out these coming and going in all directions between:

- The evolutions of the legal requirements, according to the decrees publication,
- The accompaniment practices according to the sectors specificities,
- The evolution of the financing and control devices of the structures and activities,
- The normative framework ISO 9001,

- The training and involvement of the project actors,
- The writing of the OSUA tool.

In this very changing framework, it seems impossible to lead a project according to a logic based on objectives defined as unchangeable since the beginning.

The political outlines of the association remain stable, the point is: from all the association users' needs and expectations defining actions that seem "unimportant" on the shorter or longer term, but which results, in relation with the determined punctual objectives, will impose to draw again the initially contemplated answers.

In this logic, the association should work according to a continual strategic positioning, towards the continuous improvement system it decided to implement.

Should not we speak of project management according to a "sub-objectives" logic, in a context that is so closely linked to the evolution of the users' needs and expectations that has become structural?

The design and development methodology of the OSUA tool is tributary of this contextual functioning, that always implies to question the bases of the decisions that were validated during the previous steps of the project and that can not be considered as definitive any more.

Another consequence of this functioning is the difficulty for the association and the project coordinators to formalise and model a methodology of project management, whereas the context remains unpredictable.

## **CONCLUSION**

The legal and normative requirements, the natural evolution of the cared people, the bridges to changes, the continuous improvement step, are elements we should take into account before any integration project of a tool like OSUA, as they provoke regular questioning that often oblige to make form corrections on the decisions that were previously made.

At this development stage of the project, the gathering work of the external requirements the association is tributary to is not totally finished. Presently, it is too early for the Adapei of Besançon to comment the results that are implied by the choice of the management tool of the data about users.