

## **Managing overall performance within metropolises or how to respond to society's values**

### **Abstract**

In the face of increasing awareness of societal and environmental issues, local authorities, who are closest to the citizens, must set an example and instill values in all the actors of the territory. In terms of SAR, it is the companies that have been the most studied in recent years. Local and regional authorities must be accountable and, in order to do so, must have better internal management. Metropolises were created since 2012 to decentralize state powers. A new organization and governance have been set up within the territories. In fact, metropolises are more or less important intercommunalities and they must operate considering the expectations of each city.

Key words: sustainable development, management tools, territorial collectivity, political will

### **Introduction**

Considering sustainable development is a concept that has attracted attention in recent years, whether in everyday life, in local authorities or in the scientific world. Economic development is becoming incompatible with the long-term protection of the planet. The term Sustainable Development appeared in 1980 among experts from the International Union for Conservation of Nature. The first real definition appeared in the Brundtland report: "development that meets the needs of the present without compromising the ability of future generations to meet their own needs" (World Commission on Environment and Development, 1987, p.51). This concept has been adopted worldwide in response to the problems of demography and global warming. Faced with increasing natural disasters, criticism of the weakness of public intervention, particularly in the United States, leads us to believe that ecology "now appears as much as a threat weighing on the world as a source of hope for the economic development required to end the crisis" (Laufer, 2008). Within the administration, "public performance management can be considered as a strategic and operational necessity, but probably not at any social and political cost" (Bartoli et al., 2011). In addition, sustainable development would be a logical continuation of public service (Rousseau, 2008), which is an ethically designed service. Indeed, the notion of public service appeared at the end of the 19th century, when the action of the State changed to invest in the economic sphere and resolve social disorders born of liberalism and market failures. Users are the main stakeholders. Sustainable development is becoming a regulatory obligation for communities because they must be accountable to the State but also to citizens. However, some communities do so voluntarily, and develop new tools in order to carry out their projects. It also appears that the very concept of sustainable development evolves over time and that the semantics change. Some agents of metropolises speak of transition. Sustainable development represents a set of constraints news. It changes the nature of local public service and provides a new framework for reflection for communities implementing sustainable development actions. The latter intervenes in accordance with public action, and has consequences on the notions of general interest and public service missions (Pwc, 2010). Some tools of territorial public management are at the service of sustainable development, in particular the Territorial Coherence Scheme (SCOT), the Territorial Climate Air Energy Plan (PCAET), the sustainable development report. The latter are a regulatory obligation and evolve with legislation. But these tools are specific to a pillar of sustainable development, and reflect the lack of a real social dimension (Leroux, 2012). This subject is all the more topical as the theme of the environment is the subject of debate. The very term sustainable development tends to disappear for more restricted notions such as the energy transition or the ecological transition. After stakeholders become aware of the issues related to sustainable development, they start to act and implement actions. We therefore live in a world of transition. Each individual has their own opinion on these concepts (Lascoumes, 1994). Thus, even if the regulations are increasingly restrictive with regard to communities, some want to go further and put forward these concepts through strong communication, by setting up public debates, by taking citizens into account in their public policies or by the desire for a label, in particular the Climate-Air-Energy label. The use of Information and Communication Technologies in communities is the essential driving force (Bertrand, 2001; Huron, Spieth, 2009). It is at the very heart of communities that it is appropriate to set an example since they are closest to the "responsible" citizen. On the other hand, the management of sustainable development actions leads to the development of very different models, particularly in the development of dashboards and the definition of the criteria to be taken into consideration (Siebauder, 2009; Huron, 2013). In the private sector, different approaches to integrating sustainable development into performance management, such as the Sustainability Balanced Scorecard. The various research studies in the literature focus on the private sector but few of them focus on the public sector, and in particular on local authorities. Our research would therefore make it possible to enrich the literature on the public sector, and in particular on local authorities. Due to the many specificities of local authorities, the implementation of fairly recent management control and the creation of metropolises since 2012, the following question should be asked: how do metropolises manage overall performance?

To answer this problem, a simple case study will be presented. Before studying the Grand-Est Region, it is appropriate to highlight the concepts of sustainable development and the steering tools, then to understand the search for legitimacy of local authorities to finally discuss the case of the Grand-Est.

## **1. Status of steering tools: towards an integration of sustainable development concepts in the performance of organizations?**

### **1.1 The definition of performance: existence of different representations**

Currently, all organizations, whether public or private, are looking for what is called performance. For some, it is a rather financial performance (companies), for others a performance referring to the achievement of objectives that must serve a general interest (public organizations), and finally a performance integrating the principles of sustainable development, called overall performance.

Different definitions of performance exist but the one retained is that of public performance which was established by different authors from different models. Thus, public performance can be defined as "the capacity of a public organization to control its human, financial and organizational resources, in order to produce an adapted offer of public services, in quality and quantity, meeting the needs of its stakeholders and generating sustainable effects on its territory" (Carassus et al., 2011). For these same authors, this public performance is not currently framed by common practices. Thus, depending on the definition that the agent gives to performance, the management tool will not be identical. This definition highlights the consideration of "sustainable effects on its territory", which can be linked to the definition of sustainable development in the Brundtland report of 1987. The consideration of sustainable development in local authorities is therefore entirely linked to the search for satisfaction with public services. Overall performance can be defined as "the combination of financial performance, social performance and societal performance" (Germain, Trébucq, 2004).

It is also important to be able to define the management of an organization. Management can be defined as "a management approach that seeks to permanently link strategy and operational action, based on three complementary components:

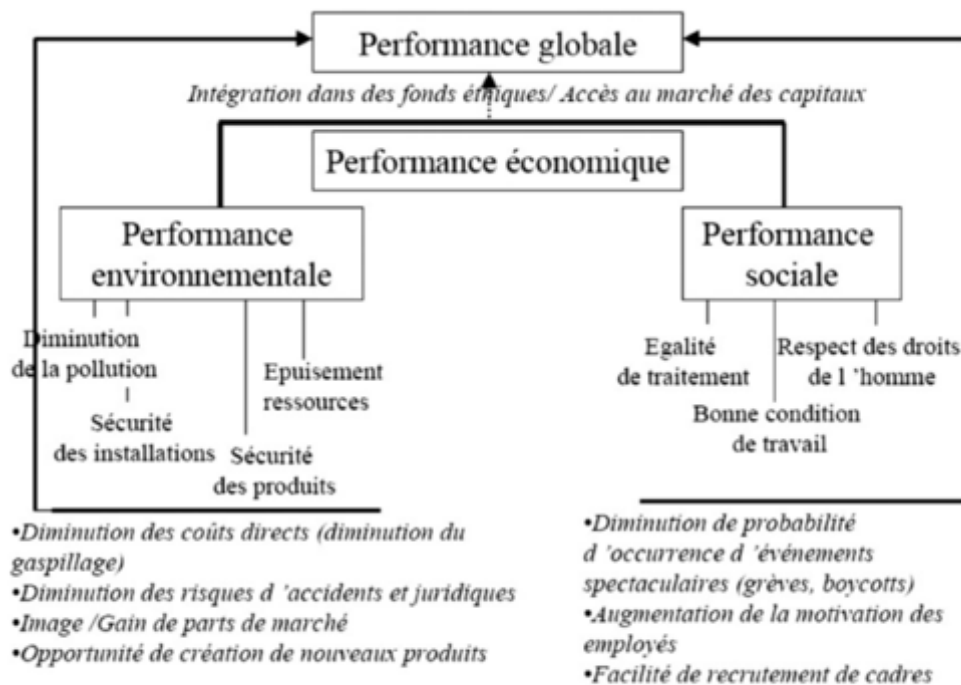
- The deployment of the strategy in the form of action plans including the regular development of coordinated plans to lead the company and ensure the implementation of its strategy
- The construction and updating of a network of performance indicators to measure the results of the actions, in line with the strategic orientations
- The monitoring and feedback of the implementation of this strategy, of these action plans, based on a performance measurement system and on a set of practices and methods of analysis and resolution of problems, animation and coordination" (Demeestère, Lorino and Mottis, 2006, p.12).

Steering is the essential driving force of the organization. It allows to point out the disruptive elements but also to follow the actions and projects of the company. Once these elements have been analyzed, it will be easier to make a corrective decision. To be able to steer an organization, it is necessary to seek to define what one wants to obtain: financial performance or overall performance.

### **1.2 Sustainable development: the new framework for steering the organization**

"Sustainable development can therefore be part of a "strategic-operational" steering framework pursuing a dual objective: on the one hand, to ensure that the sustainable development strategy, as defined and displayed by the general management, is translated into concrete and daily actions, at the very heart of the processes; on the other hand, in a learning approach, to capitalize on feedback" (Naro G. and Noguera F., 2008). To successfully carry out public policies of Corporate Social Responsibility (CSR), i.e. integrating environmental

and social aspects, governance is also an important pillar. Sustainable development in local authorities is increasingly in demand, particularly in municipalities, since this concern is becoming essential on the electoral level (Charlot-Valdieu and Outrequin, 1999). It would make it possible to legitimize the governance of local authorities as well as democracy. Governance can be defined as the "combination of elective democracy, citizen participation and rational approaches to decision-making based on indicators and evaluations" (Brodhag, 1997, p. 31). "Sustainable urban development projects can now be seen as political projects of societal change, of evolving terms of analysis and of democratic renewal" (Brodach et Goffi, 2005). Local authorities must respond to the various stakeholders, and in particular residents. "The issue of sustainable development tends to establish a relationship with populations that is similar to a translation process (Callon, 1986). The constructed problematization expresses the search for a system of alliances in which populations are stakeholders in their entirety" (Rumpala, 2008, p.6). A new performance is then to be considered, namely overall performance, integrating the environmental and social dimensions that can impact economic performance, as specified in the figure below:



Source : Reynaud, 2003

Overall performance can therefore be an advantage for the organization that implements it. The integration of sustainable development within organizations is reflected in the notion of CSR (Corporate Social Responsibility). CSR is increasingly used, particularly with the ISO 26000 standard, which defines it as: "the impacts of its decisions and activities on society and the environment resulting in ethical and transparent behavior that:

- Contributes to sustainable development, including the health and well-being of society
- Takes into account the expectations of stakeholders

- Complies with the laws in force while being consistent with international standards of behavior
- Is integrated into the entire organization and implemented in its relationships" (ISO-DIS 26000, October 8, 2009)

There are management tools that integrate the concepts of sustainable development and Corporate Social Responsibility (CSR), but these are tools from the private sphere. They are either accounting approach tools, reporting tools or dashboards that link strategy and operations. The most widely used is the Balanced Scorecard by Kaplan and Norton (1998, 2001). From this model comes that of the Sustainability Balanced Scorecard SBSC (Epstein, Wisner, 2001; Bieker, 2002; Figge et al., 2002) and the Total Balanced Scorecard (Supizet, 2002), advocating the integration of environmental and social issues within a fifth pillar or within the four main pillars of the Balanced Scorecard. The different tools can be summarized in the table below:

Table 1: Steering tools integrating sustainable development into the private sphere

<b>Forms of integration</b>	<b>Limits</b>
The external vision: <ul style="list-style-type: none"> <li>• Communicate</li> <li>• Report</li> <li>• Rating, labels and ISO 26000 standards (Christophe, 2009)</li> </ul>	No reporting standardization (Capron, Quairel, 2009); Two visions of social responsibility: American and European (Bartolomeo 2000; Moquet, 2010)
The accounting approach: <ul style="list-style-type: none"> <li>• Social accounting (Capron, 2009)</li> <li>• Environmental accounting (Christophe, 1995)</li> <li>• Triple Bottom Line (Elkington, 1997)</li> </ul>	No long-term management (Capron, Quairel, 2010); Only financial measurement (Hubbard, 2009; Quairel, 2006)
The approach using a set of indicators: <ul style="list-style-type: none"> <li>• the Sustainability Balanced Scorecard (Hockerts 2001, Bieker, 2002; Epstein, Wisner, 2001; Figge et al., 2002)</li> <li>• the Total Balanced Scorecard (Supizet, 2002)</li> </ul>	Too partial integration (Germain, Gates, 2010); Solely economic measurement (Mousli, 2010); Problem of choosing indicators (Boulanger, 2004)

Source : the author

This table presents tools from the private sphere and with limitations, in particular the fact that they do not integrate all the pillars of sustainable development. Some tools have already been used in the public sphere, including the Sustainability Balanced Scorecard (Ory, 2018) within the university but also several studies on the use of the BSC in communities.

Beyond this overall performance, it would also be a question for communities of creating value for the common good and therefore of being Sustainability Business 3.0 and of thinking about how the community can provide services in order to resolve the environmental pressures of society (Dyllick and Muff, 2016). The common good refers "to the notion of exchange and induces reciprocity, while signifying an idea of burden" (Drogou, 2017). The territory itself is therefore part of it since the inhabitants are taxpayers who pay taxes to meet

the needs of the territories and to transform them. Politics must respond to the general interest, that is to say to make life better in the territory. There is thus a certain reciprocity. The question then arises as to the existence of steering tools in local authorities. Is sustainable development integrated into the strategy of these structures? If so, how is sustainable development managed? Is there a dashboard? If so, how is it produced and used?

## **2. Case study methodology**

### **2.1 Data collection methodology**

To address our problem, a qualitative case study was conducted, particularly because there is little data in the public sector literature. The case study was chosen in order to understand and describe a phenomenon that has not yet been studied much. "If the researcher wishes to describe a phenomenon in all its complexity, using a so-called "comprehensive" approach, taking into account a large number of factors, then the case method is ideal" (Giroux, 2003, p. 43).

Semi-directed interviews were conducted using an interview guide, grouping together the questions to ask the interviewer. These questions cover the themes relevant to the problem, and can come from intuition and observation. Semi-directed interviews allow us to give the respondent a certain amount of freedom (Gavard-Perret et al., 2011, p.92). The interview guide includes around thirty questions relating to the three parts of the literature review: existence or not of management tools, do they come from the private sphere or are they developed by agents of the metropolises, do they fall under a legal obligation or the will of politicians. A content analysis was carried out. According to Gavard-Perret et al. (2011), content analysis allows to compare the responses in terms of centers of interest of different groups (in particular here hierarchical superiors and subordinates). It groups together three main stages: pre-analysis, exploitation of the material and processing of the results allowing inference and interpretation (Bardin 1997). Content analysis is based on units of "meaning", referring here to the meaning of a word or group of words according to the meaning given in the immediate context in which it is mobilized (Allard-Poesi; 2003). Content analysis is thematic in nature, allowing the counting of items or themes, allowing the opinions expressed to be highlighted (Bardin, 1997). Content analysis is both qualitative and quantitative, allowing the triangulation of analysis methods (Miles and Huberman, 2003). The use of NVivo 12 software saved time in coding. Major themes recur in each interview: communication of actions, stakeholder opinion, management control system and dashboards. These are descriptive codes that "do not suggest any interpretation, but simply the attribution of a class of phenomena to a segment of text" (Huberman, Miles, 2003).

### **2.2 The Grand-Est Region: what about the Marne department**

The Grand-Est Region is made up of 10 departments from Nogent-sur-Seine to Strasbourg over 57,441 km<sup>2</sup>, 5 metropolitan areas (Nancy, Strasbourg, Reims, Metz, Mulhouse), urban communities and 5,121 municipalities. The metropolis is a Public Establishment for Intercommunal Cooperation (EPCI), created by law n°2010-1563 of 16 December 2010, on the reform of local authorities. It is the 2nd largest industrial region in France with 6 Regional Natural Parks covering 15% of the territory and 27 Regional Nature Reserves (RNR).

The interviews lasted between 45 minutes and an hour, with 6 people in charge of these issues within the Greater Reims metropolitan area, but also within the Châlons-en Champagne (2)

urban community, Epernay, the DREAL and the ADEME of the Grand-Est. It was complex to interview management controllers, either because in small municipalities management control is not present, or because the agents in charge of these issues refuse to answer.

### 3. Results and discussion: sustainable local authorities

#### 3.1 Results

Sustainable development has been an innovative, unifying concept since the implementation of its principles cannot be done without the awareness of all actors in society, including citizens. Local authorities therefore become teachers of these principles. This has been possible thanks to new technologies and communication. Indeed, according to Berhault (2010), "citizens of the 21st century have the opportunity to participate in the creation of a more sustainable world. The Internet and new digital technologies can provide what is too often lacking in territorial approaches: cooperation, efficiency and pooling".

For all those interviewed, sustainable development is a cross-cutting policy.

"From 2008, the emergence of cross-cutting public policy with a global view of sustainable development in all policies, which implies very structured work and cross-cutting action plans" (comments of the PCAET mission manager of Grand-Reims). The development of a PCAET (Territorial Climate Air Energy Plan) is mandatory for any inter-municipal authority with its own tax system of more than 20,000 inhabitants (EPCI "obliged"), and is also proposed to smaller inter-municipal authorities (this is called a voluntary PCAET). It is possible under certain conditions to produce a PCAET on the scale of a Territorial Coherence Scheme (SCoT), or even to integrate the PCAET into a SCoT. The other mandatory document is the sustainable development report. The sustainable development report was also developed by choosing the inputs. The question of the neutrality of this report should then be asked.

Conversely, "Agenda 21 is a voluntary approach" (comments of the ADEME climate plan referent). "The State is increasingly forcing local authorities to enter and plan their environmental actions within the European framework).

Here are the results presented through the different themes of the questionnaire:

Table 2: measurement of overall performance within the metropolis

Indicator	Citation	Item	Comment
Steering tools from the public. Use of a spreadsheet. Setting up an indicator	"The tool used is the PCAET" "Use of green budgets or climate budgets, set up by I4CE, but difficult to quantify at the moment" "125 indicators for the PCAET" "Some are mandatory, others are not" "The indicators that are more internal to the community are integrated into the RDD"	6	A steering has been set up. However, there is no dashboard model used, moreover the private models, such as the Sustainability Balanced Scorecard is not known to local authority agents. The PCAET is an action plan with indicators to be filled in if the local authority is monitored by ADEME. However, another decision-making tool must be built. Some indicators are built

	<p>"The PCAET allows you to highlight"</p> <p>"decision-making tool built with a colleague because there is a certain transversality. It is an Excel tool with the source of the indicators to know who to contact to collect them and how to calculate them"</p> <p>"The Climate Air Energy label imposes certain indicators"</p>		<p>by the agents with the help of a Scientific Committee for Greater Reims.</p>
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source: the author

Impact indicators exist (Châlons en Champagne) but they are difficult to collect and Grand-Reims is working to implement them.

The indicators are used in decision-making (Grand-Reims and Châlons-en-Champagne). For the budget, "there are choices to be made and the arbitration is still focused on the economic weight but the budget analysis is done through an environmental prism" (Châlons-en-Champagne). The budget is also becoming within the Grand-Reims metropolis the green budget developed by the I4CE, the Institute of Economics for Climate. It involves examining the budget through the prism of climate to make decisions and direct spending. Biodiversity has also been integrated into this methodology since 2022. It is an evaluation tool that was co-constructed with metropolises and regions, in particular so that it can be applied at all levels, from the Region to the municipality.

Within the Grand-Est Region, another system has been set up in partnership with ADEME under the name of Climaxion. Climaxion is a unique program that supports communities, businesses, associations, social landlords, building professionals and individuals in their eco-responsible approaches. This transition must contribute to achieving the objectives of the Regional Plan for Development, Sustainable Development and Territorial Equality (SRADDET), which reinforces over time the orientations already undertaken by setting the objective of becoming a positive energy and low carbon region by 2050. This program is broken down into 8 components:

- Energy efficiency and environmental quality of buildings
- Renewable and recovered energies
- Circular economy and waste management
- Sustainable territories
- Sustainable mobility
- Agriculture, viticulture, forestry-wood
- Sustainable tourism

- Brownfield management (ADEME)

“For the social component, we are more in social justice, equity, access to resources for all and financing the transition” (ADEME project manager).

Even if actions exist, “culturally, in the Grand-Est Region we are less advanced than Nantes Pays de la Loire” (comments of the DREAL project manager). In addition to funding management tools, training, the willingness of agents and politicians, CSR would also be linked to the culture of the territories. "Agents do not really understand why there is this or that indicator". It is an engineering problem. "It is not in their culture to have a systemic vision". "For me, everything that is sustainable development must be at the top of the organization chart" (DREAL project manager), which is in line with the integrated CSR strategy. "The Sustainable Development Goals are not necessarily used. Communities are too focused on energy" (DREAL). For Greater Reims, a GHG assessment is mandatory from 50,000 inhabitants. A second obligation outside the PCAET is the PPA (Partnership Development Project), with the creation of an observatory. "A software exists, the Open PCAET but we have not chosen this type of tool for the budget and in relation to the organization of the observatory" (PCAET Grand-Reims project manager).

At the beginning, the concept of sustainable development was a way to mobilize the stakeholders of the territory (Capron and Quairel, 2006), but the metropolis was able to set up tools and initiatives to manage overall performance. Politics and agents co-construct public policies. Each community, whether small or large, can participate in the dissemination of sustainable development projects. There is a real desire for co-construction within Grand-Reims, with a steering committee and a scientific committee where other public bodies such as ATMO (air quality observatory) and the Urban Planning Agency participate. This participatory management makes it possible to work towards improving a sustainable and ethical territory, which is in line with the very definition of public performance (Carassus et al., 2014).

### **3.2 Summary and discussion**

Within the Grand-Est Region, a co-construction of the CSR was launched, particularly within the Grand-Reims. Many actions were implemented to raise awareness among stakeholders in the metropolis. An observatory was created with the support of various stakeholders including scientists. Sustainable development was a concept used to mobilize stakeholders. To respond to the invectives of public policies, this concept gives way to the concept of "transition", particularly the climate and low-carbon transition. The Reims metropolis has been able to integrate sustainable development as a strategy (Noguera, 2008) of the metropolis, which is still under construction, but the indicators will be taken for decisions. Moreover, a climate budget has been constructed. However, we cannot explicitly know the nature of the budget calculation, nor the cost. Concerning dashboards, the Sustainability Balanced Scorecard (Epstein, Wisner, 2001; Bieker, 2002; Figge et al., 2002) is not known, nor are the private sector tools since the indicators are developed by the agents or they are those from the Climat Air Energie label or ADEME, which is a tool set up for communities and not companies. The indicators are both qualitative and quantitative as recommended by Kaplan and Norton in their BSC model. Some impact indicators exist but they are not yet well developed and used.

Budgetary and monitoring indicators exist but not necessarily on behavior change (Grand-Reims Project Manager). However, it is difficult for agents to fill in these indicators if there are too many of them and there is no tool model for reporting the indicators.

Stakeholder involvement is an advantage in this metropolis, which is consistent with the words of Bartoli et al. (2011). This would then be the evolution of public management in order to improve the links between individuals. A territory is not made up only of the metropolis but also of other municipalities, businesses, citizens, public bodies such as ADEME, DREAL, the Urban Planning Agency. All stakeholders are then in interaction, in order to co-construct a sustainable territory, via observatories, indicator collection software, particularly in Epernay. Moreover, the municipalities are not forced by the metropolis but rather highlighted when they use good practices in terms of sustainable development.

## **Conclusion**

Sustainable development is becoming a concept that is increasingly taken into account within local authorities, in order to legitimize themselves and communicate with citizens. However, some communities have a real desire to manage overall performance, particularly since sustainable development would be the logical continuation of public service (Rousseau, 2008), a statement echoed by the Sustainable Development Manager of the city of Rezé: "The only performance that can be evaluated is through impact indicators, what is sought is to raise awareness and change citizens. There is no performance objective but rather a general interest objective". These statements echo those of some researchers criticizing New Public Management (Bouckaert and Pollitt, 2011; Drechsler, 2005).

In the Greater Reims Region, sustainable development tends to be used strategically by implementing real management through budgets, costs, and indicators, even if these do not come directly from the private sector. These are tools co-constructed between agents, politicians and public bodies such as ADEME and research institutes. There is also a participatory management system allowing the consideration of citizens' opinions on major projects in the territory (Epernay) with the creation of a citizens' collective. It is indeed important to be able to integrate citizens into decision-making. Each public policy has its own indicators and some relate to sustainable development. It appears that this concept is not defined in the same way from one agent to another, which could pose a problem in the construction of tools. However, our case study cannot be generalized to all metropolises or all local authorities, in particular because the issues are different from one territory to another. Taking sustainable development into account depends on the politicians and agents who initiate the various projects and indicators. This case study could be supplemented by other studies of metropolises. Furthermore, it would be possible to question management controllers in order to highlight their mastery of these issues and whether certain indicators would ultimately not be linked to the concept of sustainable development without knowing it. The fact that few controllers responded to us may come from the fact that the two skills must be linked: skills related to monitoring sustainable development (calculation of the carbon footprint for example) and those related to management control (Renaud, 2014).

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