
Human resource management — Organizational culture metrics cluster

*Management des ressources humaines — Indicateurs de mesure de la
culture d'entreprise*

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Contents

	Page
Foreword	iv
Introduction	v
1 Scope	1
2 Normative references	1
3 Terms and definitions	1
4 Engagement, satisfaction and commitment metric	1
4.1 General	1
4.2 Purpose	2
4.3 Formula	2
4.3.1 What to measure	2
4.3.2 Choice of tools	3
4.3.3 Choice of questions	3
4.4 Contextual factors	5
4.5 Predictive factors	5
5 Retention rate metric	5
5.1 General	5
5.2 Purpose	5
5.3 Formula and analytics	6
5.3.1 General	6
5.3.2 Culture and data collection groupings	6
5.3.3 Culture and causal analysis	6
5.4 Contextual factors	7
5.5 Predictive factors	7
Annex A (informative) Basic corporate culture survey (maturity stages 1 and 2)	9
Annex B (informative) Developing corporate culture statements in a mature organization (maturity stages 3 and 4)	12
Annex C (informative) Culture and HR metrics	13
Bibliography	15

Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular, the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see www.iso.org/patents).

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For an explanation of the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT), see www.iso.org/iso/foreword.html.

This document was prepared by Technical Committee ISO/TC 260, *Human resource management*.

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at www.iso.org/members.html.

Introduction

ISO 30414 highlights guidelines on the following core human capital reporting areas or “clusters”:

- compliance and ethics;
- costs;
- diversity;
- leadership;
- organizational culture;
- organizational health, safety and well-being;
- productivity;
- recruitment, mobility and turnover;
- skills and capabilities;
- succession planning;
- workforce availability.

This document deals specifically with the cluster of metrics in the organizational culture area.

An organization's workforce includes permanent employees, casuals, contingent workers and all workers who fall within the reporting organization's governance and leadership structure. Where possible and practical, reporting and metrics should include the breakdown by type of worker. There should be both aggregated measures that assess the overall assessment of culture across the whole workforce and breakdowns that link metrics to factors that can be acted upon to influence changes in culture. For example, outsourced workers can operate within a different leadership or governance structure yet have an influence on the overall performance of one or more different business units.

All such people are contributing components of overall human capital yet can also be part of a supplier, distributor or other third-party contracted organization. Assessment of culture in this situation can be assessed as part of supply chain, supplier performance evaluations or both. Such reporting of culture falls outside the scope of this document.

Each organization should document the worker categories that make up the workforce pertinent to its activity and ensure this definition is reviewed and updated regularly. For example, worker categories can include employees and casuals for a period then additional contractors or outsourced labour will possibly be required. This would necessitate changes to the definition, metric and reporting of these worker categories.

Breakdowns and analysis of data can include:

- subsidiary, division, department or cost centre hierarchy;
- geographic location;
- workforce category or grouping;
- position or level (e.g. management, supervisory, front line);
- function (e.g. technical specialization);
- tenure or length of service;
- values or culture orientation at time of assessment.

Organizations need to understand the drivers of a committed and engaged workforce and ensure that the metrics and groupings selected can be linked to a causal relationship with factors that can be addressed to change current performance. Some examples include:

- lack of clearly defined organisational purpose can create conflicting priorities;
- lack of clearly defined or understood values can cause inconsistent behaviour;
- inconsistent supervisory direction can cause lower engagement;
- inadequate hiring practices can introduce employees who do not share organizational values;
- poor departmental safety records can impact employee retention.

The metrics that indicate key aspects of corporate culture are defined in ISO 30414 as follows:

- engagement, satisfaction and commitment;
- retention rate.

This document describes the following components for each of the above metrics:

- general description;
- purpose;
- formula;
- contextual factors;
- predictive factors.

Metrics relative to organizational culture can be considered an ongoing and evolving area and organizations should strive to continually develop their understanding of their culture and link metrics within the culture cluster to key components that driver the overall level of a high-performance culture.

Organizational culture is a reflection of the way an organization operates and deals with the creation of a work environment that defines, supports and creates the expected behaviours of the workforce. The outcome of an effective culture is a workplace that encourages engagement, involvement, commitment, innovation and those attributes that support the corporate vision and purpose.

Human resource management — Organizational culture metrics cluster

1 Scope

This document describes the elements of organizational culture and provides the formula for comparable measures for internal and external reporting.

This document also highlights issues that need to be considered when interpreting the organizational culture data, especially when deciding on appropriate interventions internally and when reporting these to external stakeholders (e.g. regulators, investors).

2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO 30400:2016, *Human resource management — Vocabulary*

3 Terms and definitions

For the purposes of this document, the terms and definitions given in ISO 30400 apply.

ISO and IEC maintain terminological databases for use in standardization at the following addresses:

- ISO Online browsing platform: available at <https://www.iso.org/obp>
- IEC Electropedia: available at <http://www.electropedia.org/>

4 Engagement, satisfaction and commitment metric

4.1 General

Engagement, satisfaction and commitment are part of the terminology for assessing the degree to which human capital in an organization is operating at the optimum potential. An important outcome of the environment which is created within an organization by many contributing factors should be a high level of alignment between people's actions and desired organizational outcomes. Factors influencing an effective culture include the organization's vision, values, norms, behaviours, beliefs, habits, rewards, recognition and feedback and employee engagement.

National, regional, local and organizational cultures are often unique, and terminology can differ. Those developing metrics in this area should ensure that the data collection and measurement approaches being used reflect these differences while creating relevant feedback on the alignment between human capital and organizational purpose, strategy and values.

ISO 30414:2018, 4.7.6, 1), defines an “engaged employee” as an individual who is fully absorbed by and enthusiastic about his or her work and takes positive action to further the organization's reputation and interests. Engaged employees are in many cases also enthusiastic about opportunities for development, collaboration and progression.

ISO 10018 indicates that engagement occurs when people are fully engaged in the activities of the organization and experience more personal fulfilment. The organization consequently conducts its

activities more effectively. It defines engagement as the level of satisfaction that people have in activities such as communication, learning and management. See also ISO 56000.

Approaches to metrics that measure culture develop as an organization matures in its approach to human resource management. Initial surveys use questions related to general employee satisfaction. More mature organizations assess satisfaction against expectations of values and behaviour that have been defined and stated as organizational values.

4.2 Purpose

One key outcome of an effective organizational culture is a high level of employee engagement and this metric is necessary to gain insight into the level of employee engagement in their work. Engagement, satisfaction and commitment mean different things to different countries and cultures. Awareness of international context and comparability is important.

The organizational culture should provide the motivation for employee engagement; this can be defined as values and attitudes that drive individuals to commit to organizational and individual objectives and reflects a willingness to deliver maximum performance. Increasing workforce motivation is associated with increasing the value of human capital. Results from this metric provide internal users with information to enhance levels of employee engagement. External users can use this information to assess management's performance in the effective use of human capital both from an operating perspective and in terms of sustaining competitive advantage from the workforce as an investment.

4.3 Formula

4.3.1 What to measure

Corporate culture is often referred to as “the way things are done around here”. In any organization, “what is done” is a combination of its purpose (mission or vision) and its values (principles that guide behaviour). Understanding purpose, and one's own role in achieving the desired organizational outcomes, is a key driver to corporate performance and human satisfaction. Understanding values is the key driver in guiding all areas of personal behaviour, including compliance with laws as well as abiding by required codes of ethics and conduct.

Any system of metrics for assessing culture should address both purpose and values; the depth of questions asked should determine whether the guiding information has been established and communicated and forms the basis of actual practice. A critical factor for choosing what to measure depends upon the understanding and maturity of the organization in determining its own unique culture. This can be understood as assessing the level of the maturity of culture, as demonstrated in [Table 1](#).

Table 1 — Suggested stages of cultural maturity

Stage	Cultural maturity	Explanation	Approach to cultural assessment and measurement
1	Undeveloped	No purpose, values or statement exists defining expected culture.	Questions based on general workforce satisfaction indicators.
2	Early	Desired culture has been developed and gaps assessed between desired culture, behaviour or values and existing reality.	Questions based on a mix of traditional satisfaction indicators and desired culture versus actual performance.
3	Developing	Desired culture embedded in hiring programs, orientation, leadership development, policies and procedures, performance feedback, compensation and all other aspects of “how we do business”.	Questions specifically related to key aspects of organizations' own expectations versus actual experience by employees within specific activities.

Table 1 (continued)

Stage	Cultural maturity	Explanation	Approach to cultural assessment and measurement
4	Mature	Culture understood and applied where strategic and business planning are aligned for equality between human capital and operational outcomes. Human behaviours are clearly aligned with operational goals.	Portfolio of multiple tools to assess holistic culture such as surveys or other means based on desired performance, leadership 360° assessments, client input, supplier input and others.

See [Annex A](#) for culture questions that can be used in an organization at levels 1 or 2 of maturity. [Annex B](#) and [Figure B.1](#) provide further consideration of how culture can be developed as a central aspect of strategic planning that guides organizational behaviour as a key aspect of strategic vision. The outcome of this thinking should guide questions for developing surveys at levels 3 and 4 of maturity. [Annex C](#) provides suggestions and ideas to develop specific culture questions.

4.3.2 Choice of tools

The most common instrument to obtain findings on employee engagement is an employee survey as a basis for generating an overall (high level aggregated) index ([Table 2](#)). The use of employee surveys or other similar tools can vary depending on business model, environment or size of an organization. In cases where organizations are not able to conduct employee surveys, other systematic evaluations can be used. Any instrument used (e.g. survey or evaluation) should guarantee and safeguard the anonymity of the employees.

With respect to leadership and motivation issues, it has to be ensured that any questionnaire which helps to collect basic data on an organization's people commitment or job satisfaction across several countries uses a terminology that has the same connotations and meaning in all these countries. Otherwise, data will not be completely comparable at an international level.

Table 2 — Example of reporting on engagement index

	2018	2017	2016
Europe	84	83	80
Asia/Pacific	86	85	81
North America	81	81	76
Average engagement index (scale between 0 and 100)	84	83	79

Aggregated results of focus groups can also be used to provide input to the level of employee engagement, satisfaction or commitment; these can provide the basis for identification of effective and non-effective drivers of employee motivation.

External input can also be obtained to provide third-party perspectives of employee commitment and engagement. In service organizations such as financial services, customer information can be extremely valuable in providing independent results. Customer input can be critical in assessing culture; as an example, questions about “how easy we are to deal with as a supplier” or “how helpful our organization is in problem solving” can provide insight into the culture as seen by others.

For internal assessments of organizational culture, tools such as 360° surveys (where those in leadership positions are evaluated by superiors, peers and subordinates) can also be very helpful in providing an understanding on how well organizational (behavioural) values are being demonstrated by those in leadership positions.

4.3.3 Choice of questions

In order to build a meaningful link between levels of employee engagement and organizational culture, questions selected should link to known drivers of employee behaviour, attitudes and beliefs which

result in motivation and engagement. The questions asked and the results obtained should enable users to identify the potential cause of lower performance so that action can be taken to eliminate such cause.

Questions related to purpose tend to be task-related and ensure linkage between the organization's intended product or service outcomes and the individual's contribution to activities to ensure these outcomes are achieved. Examples include:

- Does the organization have a clearly stated purpose?
- Have the organization's plans for achievement of its purpose been communicated to you?
- Is your specific role in achieving the organization's purpose clearly defined?
- Do you have access to the tools or equipment needed to do your job?
- Is there regular feedback on actual results versus plans?
- Does feedback reflect leadership recognition of employee contribution?
- Can you suggest changes and improvements to your work?
- Are suggestions for improvement heard and, where practical, implemented?
- Are suggestions that you make taken seriously and implemented, where practical?
- Do you believe that your workload is fair and reasonable?

In some national and organizational cultures, questions related to levels of employee engagement with organizational purpose are less relevant and can either be avoided or weighted to be a lower proportion of the overall results. When deciding on questions to ask, the level of engagement in purpose-related questions should align with the levels of employee involvement established in the values statement.

Questions related to values determine the behavioural environment that the organization expects its workforce to operate within. Such values should typically permeate every aspect of interaction among and between members of the workforce, between all departments, between all levels and, ideally, between the workforce and third parties. Organizational values provide the basis for the actions taken by the workforce while they are carrying out their tasks. Typically, effective cultures seek engagement through areas such as communications, collaboration, cooperation and the building of trust. Examples include:

- Does the organization have a clearly stated set of behavioural values?
- Do these stated values guide decision-making?
- Does my immediate supervisor consistently apply these values?
- Do I observe these values guiding my relationship with other departments?
- Does the organization demonstrate these values in external relationships?

Value-related questions should be driven by the objectives stated. High engagement comes when the workforce knows, understands and observes stated expectations in action. Low engagement, together with low test and commitment, comes where surveys or other means demonstrate a gap between stated and actual behaviours.

A final series of questions should be asked to determine satisfaction with areas such as compensation, incentives and bonus schemes and employee benefits. While these are limited in terms of motivation, they can have a significant impact on negative attitudes.

4.4 Contextual factors

Cultures are unique both in terms of where an organization operates – its national or regional locations – as well as the industry within which it operates. Assessments of culture through employee engagement should consider such realities.

The size and structure of an organization can often impact culture. International and multinational organizations often have a mix of corporate and national cultures. Public organizations have different cultures to private organizations. Owner-operated organizations often have a different culture to a publicly owned organization. Mature organizations have different cultures to new, entrepreneurial organizations. Metrics to assess engagement as a measure of culture should be created and structured within the reality of the unique environment of the organization.

Organizations also undergo changes in culture when significant events occur. These should be taken into account when assessing culture over time. Such changes can include economic downturns, mergers and amalgamations, significant changes in corporate purpose and changes in ownership.

Levels of existing management credibility, together with an existing level of employee engagement, can also have significant impact on results. Design and administration of both metrics and approaches to data collection and evaluation should strive for a high participation rate to ensure balanced results with as little bias as possible.

4.5 Predictive factors

Planning for and forecasting changes in culture is often hard as these changes are significantly impacted by human emotions. Where actual results are low, improvements can take time due to factors such as lack of trust in existing management or changes in leadership.

Loss of engagement and reductions in an effective culture are also often associated with any process of change, such as new IT systems, new policies or changes in legislation that impact the business. Understanding the current drivers of engagement and metrics relative to their performance can allow the organization to plan for preventive action when such changes are anticipated.

5 Retention rate metric

5.1 General

Retention rate is one of several indicators related to corporate culture as it can reflect the level of overall workforce satisfaction and is often referred to as the stability index. Retention rates should provide an adequate understanding of overall changes between the start and end of a given period as well as underlying details to enable causal analysis.

Detailed discussion, development and application of metrics related to both retention and turnover are discussed in ISO/TS 30421¹⁾. This document explains in detail why an in-depth understanding of the overall levels of both turnover and retention is important, but also the more critical importance of understanding the impacts and root causes of change.

5.2 Purpose

Adopting a metric for retention rate provides an indicator of how effective the work environment or culture is in retaining the desired workforce. Given that some level of turnover and loss of employees is inevitable for personal or career development reasons, a positive culture should provide members of the workforce with an incentive to stay within the organization.

1) Under preparation. Stage at the time of publication: ISO/PRF TS 30421:2021.

5.3 Formula and analytics

5.3.1 General

Detailed methods of data collection, analysis and reporting for both retention rates and turnover are provided in ISO/TS 30421. The effectiveness of linking these metrics as part of the holistic assessment of organizational culture depends upon the analytics provided.

5.3.2 Culture and data collection groupings

In addition to an overall organizational retention rate, it is important to understand the metrics by sub-categories that can have an impact on both the causes for losses and the criticality of the impact on the business. Leadership has a significant role in developing and sustaining an effective culture, thus any analysis of retention levels should be aligned with the organizational structure and reporting framework. The types of underlying information can include:

- overall retention rates by country, company, subsidiary or division;
- retention rates by division or department;
- retention rates by job category (skilled or semi-skilled);
- retention rate by years of service;
- other breakdown analytics that are organization-relevant.

Expectations of human behaviour that form a core aspect of organizational culture are deployed and reinforced by the relationships that exist between and among employees. Employees observe and experience these expectations through the reality of daily interactions with other people, especially those who they report to. Retention levels can be lower in certain divisions or departments, possibly indicating leadership issues in those areas.

5.3.3 Culture and causal analysis

It is also important to understand the reasons for the losses that contribute to a lower retention rate. These can be positive or negative and can lead to different action being taken. Losses can be caused by:

- employees lost during probationary or training period (possibly indicates hiring issues);
- losses by length of service (if losses occur after probation, but within one or two years of hiring, this possibly indicates that professed culture is not what is being experienced);
- employees terminated “for cause” (possibly with a sub-analysis of reasons);
- employee transfers from or to other departments exhibiting differing retention rates;
- employees promoted internally (within the organization but outside the base of the starting group);
- voluntary or mandatory losses due to retirement.

Sustaining a desired organizational culture is a key challenge that depends upon consistency between word and deed. Understanding details of why losses of staff are occurring, especially after initial probationary periods, can reveal conflicts that only arise as an employee gains greater experience of how consistent an organization is, in how it operates over time and in different circumstances.

5.4 Contextual factors

Retention rates and levels of expected turnover should be understood within an overall context. There are several factors that should be considered when planning, establishing, interpreting and responding to retention results. These include external situations such as:

- the type of industry (emerging, stable or declining);
- maturity of the industry, technology or sector;
- the industry sector (especially when focusing on retention of critical skills);
- overall local employment situation;
- overall economic environment (growing, declining, recession);
- changing public perception of the industry and social conduct;
- reputation or brand status of the company within the market or industry.

Internal factors can exist as a subset within the overall external factors and can include:

- strategic levels of normal retention (e.g. for state of growth, industry as established by the board or others);
- compensation range relative to industry norm;
- stability of organization (mergers, acquisitions, amalgamations);
- changes in leadership at one or more levels within the organization;
- average tenure or age of the workforce.

Supporting techniques, such as industry benchmarking and information available from employer organizations and trade groups, can help determine the ranges within which retention is acceptable.

5.5 Predictive factors

Changes in retention should remain within an acceptable controlled range; periodic increases or decreases can occur for contextual reasons and can be considered in setting target levels and planning for responding to potential changes. Factors that should be considered include prediction of periodic changes in the above contextual areas and also as a result of impacts on overall culture and changes due to complexities of human behaviour. Failure to plan for and respond to potential events that lead to a worsening of retention will have an impact on total workforce motivation, possibly escalating the loss of staff.

In addition to the above contextual events, leadership should pay attention to factors that are possibly linked to increased workforce stress and feelings of uncertainty, increased job risk and frustration. These can include:

- business plans that involve internal reorganizations;
- changes in departmental leadership (including new internal or external supervision);
- societal issues, such as increasing traffic congestion or lack of public transport;
- introduction of new equipment, resulting in work process changes;
- introduction of new IT systems (requiring reskilling as well as changes to performance feedback information);
- lack of clear succession planning action plans and communications;

— periods when increased workload is required, e.g. seasonal, promotional, new product launches.

Retention of human capital has become a critical factor in sustaining competitive advantage as well as operational capacity. Effective prediction of the impact of task changes on the workforce is an important aspect of integrating the resources provided by human capital with all other capitals.

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Annex A (informative)

Basic corporate culture survey (maturity stages 1 and 2)

A.1 Using an employee survey to assess health of corporate culture

The following survey contains examples of basic or generic culture statements. It is typically used before a corporate culture has been clearly identified, codified and embedded into work practices, behaviour and decision-making.

Provide your response and belief for each statement.

		Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
1	Our organization has a clear purpose					
2	I understand how my job supports our purpose					
3	Our company has clear behavioural values					
4	I am fairly compensated for my work					
5	I have clear direction for my work					
6	I have the tools and equipment for my work					
7	Workloads are usually reasonable					
8	Our stated values guide decision-making					
9	I am valued for my contribution					
10	I am trusted to perform my work					
11	Internal communications are effective					
12	Collaboration is supported					
13	I am treated fairly by the organization					
14	Employee suggestions are encouraged					
15	Employee suggestions are implemented					
16	People cooperate in our organization					
17	People are willing to help each other					
18	People have the opportunity to develop					
19	Learning and development are encouraged					
20	I trust my supervisor					
21	I trust senior organizational leadership					
22	This organization operates ethically					
23	Employees are recognized for good work					
24	Stress is well managed in our workplace					
25	Our organization is socially responsible					
	Total results					

Response	Score
Strongly agree	5
Agree	4
Neither agree nor disagree	3
Disagree	2
Strongly disagree	1

Each question is scored. The total score is divided by 125 to create an overall percentage result.

A.2 Explanatory notes

A.2.1 General

This basic survey example uses generic statements built around behaviours and beliefs that can exist within an organization; these can be used in situations where a defined set of values have not yet been developed or promulgated throughout an organization and reflect the early stages of cultural maturity – probably levels 1 and 2. As work on developing culture as an aspect of strategy is undertaken, moving the organization to a level 3 or 4 maturity, the statements will be driven by the desired and stated behaviours and values. This approach is covered in [Annex B](#).

A.2.2 Foundations of culture

There are two foundational aspects to developing an effective organizational culture. First, the clarity of the purpose of the organization relative to the products or services that it provides. If this is clearly stated, widely shared, understood and committed to by all employees, then there is a high probability that their individual tasks will be effectively focused and aligned on ensuring the desired outcomes.

Second, the clarity of expected human behaviour among and between everyone involved should be clearly stated, explained, understood, reinforced and constantly demonstrated, especially through the actions of those in leadership positions. These are often stated in a set of organizational values that are intended to guide the behaviour behind treatment and interaction of people. This should promote engagement, commitment, effective communication, cooperation and collaboration. It should also set a foundation for both ethical and socially responsible conduct.

A.2.3 Statements for cultural maturity stages 1 and 2

There are 25 statements in the example questionnaire that include a suggested selection of items that can be asked to develop an initial understanding of the current state of an organization's culture. These have been selected as follows:

Statements 1 and 2	To determine if a purpose statement exists.
Statement 3	To determine if a statement of values exists.
Statements 4 to 7	To assess an initial employee perspective on purpose (their reality).
Statements 8 to 19	To assess initial employee perspective of behavioural values.
Statements 20 to 25	To assess the employee view on leadership alignment with stated values.

Those developing surveys have wide latitude to develop their own statements. However, it is important when assessing the current status of culture in the early stages that statements cover these five aspects.

A.2.4 What do I do with the results?

Building and sustaining an effective culture takes time and should be developed one step at a time. Once the survey and the scoring have been completed, look for the two or three lowest scoring statements and start by focusing on these. As an example:

- If the survey reveals low or mixed results on statement 2, the further development of a values statement should be considered.
- If the survey reveals that statement 19 scores low, then understanding why becomes important so it can be improved.

In all cases the results of a survey such as this should be used as the basis for discussions with employees using approaches such as focus groups, town hall meetings and working groups. Discussions can take place to identify the underlying root causes and start to develop initiatives to improve the problems as seen by the employees.

The value of the survey can only come from using it as a tool to discover issues and then to take action to understand and improve or resolve these challenges. Once an organization has established clear statements of purpose and values, and these have been widely shared, then the statements in a survey can be modified to focus more on the reality of implementation.