



Learning and Transformation

RESOURCES FOR CONVERSATIONS
FROM THE TEXAS METHODIST FOUNDATION

DOING THE MATH OF MISSION: FRUITS, FAITHFULNESS AND METRICS

Monograph 5- **BE CAREFUL WHAT YOU MEASURE**

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The *metrics monographs* are a series of five monographs addressing the mission of the Texas Methodist Foundation to support conversations on the purpose of ministry:

1. "Counting Resources and Measuring Ministry" (Released February 2013)
2. "Getting to the Why: Turning Intentions Into Outcomes" (Released April 2013)
3. "Phronesis and the Task of Figuring It Out for Ourselves" (Released August 2013)
4. "Counts, Measures and Conversations: Using Metrics for Fruitfulness" (Released September 2013)
5. "Be Careful What You Measure" (Released October 2013)

The Strategic Direction of TMF: The Texas Methodist Foundation will help the Church become more purposeful and more clearly focused on her God-appointed mission through the integration of financial and leadership resources.

Our Intent: The invitation of the Texas Methodist Foundation is for you to use this monograph to support conversations of learning among leaders within your church or conference.

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BE CAREFUL WHAT YOU MEASURE

Monograph #5 in a series of five Metrics Monographs on *Doing the Math of Mission: Fruits, Faithfulness and Metrics*

BY GIL RENDLE

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In this country the roll of church members is longer than ever before. More than one hundred and fifteen million people are at least paper members of some church or synagogue. This represents an increase of 100 percent although the population has increased by only 31 percent.

The numerical growth should not be overemphasized. We must not be tempted to confuse spiritual power and large numbers. Jumboism, as someone has called it, is an utterly fallacious standard for measuring positive power.ⁱ

Martin Luther King Jr., 1963

Martin Luther King's warning of jumboism was in the midst of the 1960s, a time in which joining organizations, including the church, was at its cultural height. Denominational growth was a cultural trend that had people watching church numbers because they were all going up. And yet, King warned that numbers were not the standard for measuring the impact of faith. Now in the 21st century, we are worried about depletion because our numbers have been dwindling for decades. The warning remains. Our numbers matter deeply. But they are not the standard for measuring the impact of faith. How do we find the balance between measures and purpose? How do we continue to steer our way between our current Scylla and Charybdis to find a way ahead that will not draw us into a false institutionalism driven by too much attention to numbers nor draw us into a false complacency from giving numbers too little attention which produces an absence of accountability?

The argument in these metrics monographs has been pretty straightforward:

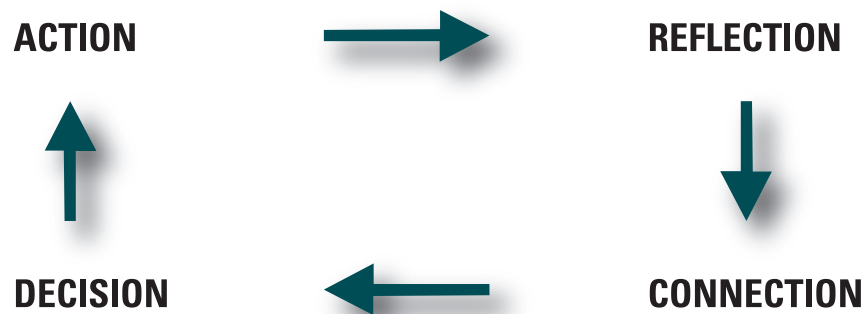
1. You get what you pay attention to. If you don't make choices about what is important and measure your progress toward your goals, nothing changes.
2. Counting in the church, by itself, is about resources and activities, not about purpose. We must gather, measure and redirect our resources for the difference we are called to make. But there must be more than attention to resources and activities.
3. Faithfulness and fruitfulness require an intentional purpose that names a difference we feel called to address but is commonly difficult to quantify. Purpose is stated in intentional outcomes, which require measurements instead of counts.
4. Measurements, assessing progress toward outcomes, requires new tools and new strategies.
5. We are in a learning mode. Metrics, as a discipline, is new to the church. We are in the process of building new tools, and like any craftsman, learning to use new tools risks injury until the capacity of the tool and the skill of the craftsman are brought together. As we begin, we need to be aware of necessary cautions to new tools.



THREE CAUTIONS WHILE BUILDING AND USING OUR NEW TOOLS

There are few straight lines in the wilderness. There are times when the way ahead seems quite clear – the pillar of fire appeared in the desert to clearly mark the way the Israelites were to travel. However, there are also times when the way is uncertain, unknown or dangerous – and, in those moments, the Israelites “pitched tent” and waited. I can only believe that the Israelites waited actively, which, when steps are uncertain, is what we are called to do. Waiting is a time of preparation. While they pitched tent, they tested their way forward. Surely they talked with one another, sent scouts to peer over the next horizon, prayed, studied text, rested, rehearsed their purpose and goals, rehearsed what they had already learned, wondered and watched. They reflected on where they were, how far they had come, and what were the necessary next steps. The wilderness is a mix of brave movement and also critical reflection.

In every new endeavor there has to be a time of pausing and testing. New insights and ideas must be tested and put into context by experience. One of the basic models of adult learning is referred to as the “adult learning cycle” and reflects this need for pausing and testing which allows for adjusting the way forward:



Inherent in this model of learning is the testing by which we try something (ACTION) and then we reflect on how it went (REFLECTION). Is the result what we expected? Were there any surprises? What did we learn? We then connect our reflections to our larger life experience (CONNECTION) and ask, is that how we understand the world? Have we seen this before? How else have we seen this work? Who do we know that has had similar or different experience? Which leads us to a decision of what to do next (DECISION) which then leads us to our next step (ACTION, again).

Without taking time to “pitch tent,” without allowing intentional pauses during which we raise questions and cautions, review, reflect, connect, and otherwise test the new ways forward, we can easily over commit to less than helpful paths. When it comes to counting and measuring there are areas of caution we must test and, based on what we find, be willing to change our directions and learn better ways. At this point there are three basic areas of caution we can be watchful for as we build new tools, initiate new practices of using metrics, and define new criteria of accountability. The areas of caution that we need to explore are:

- Short-sightedness
- Motivation
- Productivity (the appropriateness of measures)

There is a body of literature in each of these areas that can guide our efforts by identifying the pitfalls.



SHORT-SIGHTEDNESS

The first caution has to do with short-sightedness – paying too much attention, and being overly sensitive, to immediate changes so that one loses sight of long-term purpose. In this sense, “short-sightedness” is looking too near so that what is still far off goes uncared for. This is the risk of the United Methodist Church overly attending to the metrics of vital congregations by measuring only short-term increases in numbers of people and dollars (and the other counts of resources and activities), while losing sight of the purpose of a vital congregation to change people’s lives and transform the world. The risk here is that short-sightedness will capture us in a new institutionalism of organizational measures without leading us to disciple making.

Edwards Deming was introduced in the first of these metric monographs as the person who helped transform Japanese manufacturing following World War II. I have been using his basic model of inputs – throughputs – outcomes throughout these monographs. While working in the US Department of Agriculture, Deming was introduced to the work of Walter Shewhart who developed a process to bring industrial processes into what was referred to as “statistical control.” The real value of statistical control was that it enabled leaders to know where to place their attention, when to act, and – importantly – when not to act or overreactⁱⁱ Understanding the idea of statistical control became increasingly important in the 1980s, as industry began to pay close attention to “quality” as an essential element of global market competition.

By the early 1980s, Deming published his book, *Out of Crisis*, in which he identified what he called the “seven deadly diseases” that stood in the way of good management. The first two of these deadly diseases were “lack of constancy of purpose” and the “emphasis on short-term profits.”ⁱⁱⁱ He contended strongly that when corporations pursued quarterly dividends and short-term profits (the quick counts) as the basic measures of performance, they were risking their companies by not attending to their purpose. Constancy of purpose, the ability to continuously plan for the improvement of a company’s products and services, was more important and life-giving, as opposed to short term measures that took attention away from the purpose of the organization. Quoting a Japanese colleague, Dr. Yoshi Tsurumi, he wrote:

Part of America’s industrial problems is the aim of its corporate managers. Most American executives think they are in the business to make money, rather than products and service.... The Japanese corporate credo, on the other hand, is that a company should become the world’s most efficient provider of whatever product and service it offers. Once it becomes the world leader and continues to offer good products, profits follow.^{iv}

The caution here, for the United Methodist Church, is that we will need to find our balance between benchmarks and fruitfulness, between the short-term “end-of-quarter” evidence of vitality that comes from counting our resources and activities and our long-term purpose of changing lives and transforming the world.

As I have argued in a number of places, vital congregations are resources – they are nouns. We need vital congregations because they will continue to be the place of community in which disciples are formed. We cannot reasonably think that we will be able to perform our mission of disciple making without healthy, vital congregations. But vital congregations are not the difference we are trying to make. “Constancy of purpose” requires us to always remember that what we are called to produce are disciples of Jesus Christ and a changed world. Vital congregations must always be seen in service to disciple making. In other words, vital congregations are a necessary “proximate outcome” that we must master in our changed mission field in



order that we can learn to address our final missional purpose of disciples and a transformed world. At every point we need to rehearse and be directed by our purpose of making disciples and changing the world, while we focus on vital congregations. Our risk is that we will mistake our vital congregation benchmarks and our annual conference dashboards for the purpose of our leadership, and we will react too quickly to the small changes that give evidence to neither fruitfulness nor failure.

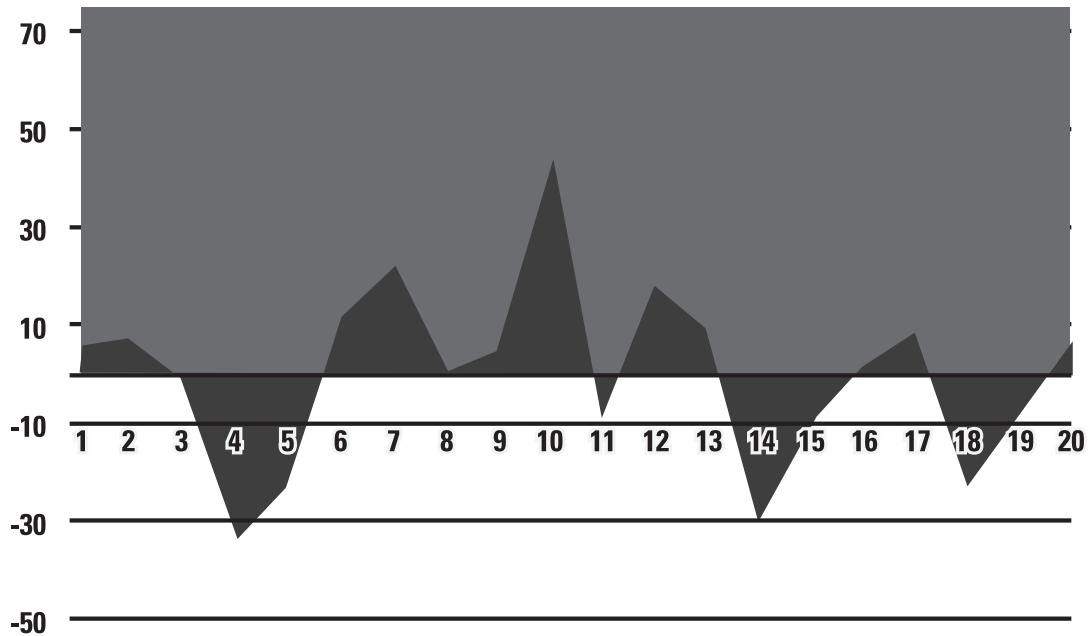
As I have argued, it is absolutely essential that we use benchmarks and dashboards to do our counting, because without them, we cannot achieve the vital congregations we need for our mission. We cannot sidestep counting simply because it doesn't fully measure what we are finally called to do. Our challenge at the moment, as a denomination, is how to keep alive the conversation and the necessary learning about making disciples, while we are redirecting our resources to produce more vital congregations. How do we keep our counts and measures balanced appropriately in our conversations and efforts, so that we don't mistake short-term measures as our real purpose?

Connected to Deming's deadly diseases is the mistake of "running a company on visible figures alone."^v The danger is that we become too sensitive to our benchmarks and dashboards, assuming they measure immediate evidence of progress toward our goals. In our anxiety, we are tempted to become oversensitive to changes in our counts. In part, this is why Deming's method of statistical control was an important tool. Understanding the natural behavior of an industry or an organization enabled leaders to know where to pay attention and invest themselves, but also when not to act – when not to get too excited and make mistakes. The statistical model introduced "upper and lower limits of control" between which any change or variation produced is simply the nature of the organization, and is not the product of efforts made by the leaders. It is a matter of understanding the standard deviation of normal variance.

Consider a real life example in which leaders of a church I was asked to work with, intentionally set a long-term goal for membership growth in their community, which was experiencing demographic and housing growth. Despite their long history of efforts toward a goal of growth, a review of their membership over a 20-year period showed there had been no real change. Interestingly (and perhaps diabolically!), in the 20 years covered by the data we examined, this congregation received 666 new members. In that same period of time the congregation lost 666 members – for a net change of 0. A part of my work with this congregation was to help them understand their data and to help them address their goal of growth. Naturally, given their continual goal and their lack of any net change after 20 years, the leaders were both frustrated and very anxious about their numbers. One of the first steps in our work was to understand the **natural performance** of their congregation in a community that was growing (new people coming in) but was also highly mobile as young professionals changed jobs (people going out).



Below is a graph of the membership change in this congregation over the 20-year period. Note that the highest net annual gain in membership was +44, which can be seen in year ten. The largest loss of members, -34, can be seen in year four. The 20-year history of this church was a continuous oscillation of ups and downs of membership until the total gain matched the total loss.



Particularly important, the leaders talked about their congregation as if it was a roller coaster of “good years” and “bad years.” They evaluated their experience and wanted to know what went wrong in bad years and what they did right in good years. They were, in fact, oversensitive and trying too hard to guess what to do next. The reality is that their congregation, in the community in which it was located, was “built” to receive up to 50 new members per year and to lose up to 50 members per year, **no matter what they did** under current conditions. While they worried about good and bad years, what they were actually looking at was the normal variation of an established system that was doing no more than reflecting its environment. This was a primary insight of Deming’s focus on statistical control. (Statistically, in the case of this congregation, the mean change was 33.3 people per year; the standard deviation was 5.7; the upper and lower control limits of variation was 50.6 – all meaning that in any given year this congregation could receive 50 new members or lose 50 members simply because of where it was and how it fit into its community.)

The reality was that the congregation went through multiple pastoral changes in the 20-year period prompted by their concerns about increasing growth, and they sent multiple leaders to multiple continuing education events about church growth trying to achieve their goal. Their over-attention to counting members pulled their attention away from their purpose as a church in their community. The conversation that was missing was what difference this congregation felt called to make in people’s lives and in their community that would want them to engage new people and the mission field around them – and would make people want to engage with them. Their over-sensitivity to annual shifts in membership numbers framed a short-sightedness that made leaders anxious and over-functioning. What was lost was the balance required by attention to purpose – the longer-termed focus on the difference they were called to make.



Churches that count members too closely, and annual conferences that announce progress or set-backs only because there is a slight shift of annual statistics, run the risk of “performance-anxiety” instead of constancy of purpose. Of course, we want to see confirmation of our efforts by watching numbers grow. However, it is not the annual shifts that will confirm our efforts, unless the shifts become a trend over time and exceed the normal limits of the congregational or annual conference systems that we already have. It will still take us a number of years for our denomination to confirm we are on the right path. In the meantime, we will need to carefully and continually rehearse our purpose at each step we take or else our constant counting will hide our need to measure progress toward our disciple making purpose.

MOTIVATION

Short-sightedness also has a negative effect on motivating people to pursue the purposeful leadership the church needs to address its mission. An inappropriate use of metrics has its negative effect on the passion leaders have for their work. Drawing again from the cautions of Deming:

One of the main effects of evaluation of performance is nourishment of short-term performance. A [person] must have something to show. [His or her] superior is forced into numerics. It is easy to count. Counts relieve management of the necessity to contrive a measure with meaning. Unfortunately, people that are measured by counting are deprived of pride of workmanship.^{vi}

Pride of workmanship comes from a sense that one has fulfilled the purpose of one’s task. From the contractor who can stand back and look at the studding that he knows will more than adequately support the wall that is needed for a home, to the craftsman who can stand back and look at the wood that she has formed into a table that has as much character as function, to the investment advisor who can sit back knowing that his advice to the client will not just generate income but will also provide security and piece of mind, to the pastor who knows that bringing a person to a commitment of participation or membership is a step toward forming a faith that can transform just living into having life, there is a purpose behind our tasks. To remove the purpose is to diminish the task. The carpenter who doesn’t understand that the wall belongs to a home can easily be drawn into using inferior materials or spacing the studs wider than the standard 16” because it can save money and materials. Purpose comes from a sense that there is a “call” to the work we do – a reason beyond the work itself. Without a call, there are only tasks. And a call and a task seek different rewards.

Consider the conversation that is mounting in the church as we try to describe the kind of leadership we believe we need for the future in our changed mission field. We speak of wanting people who are entrepreneurial, agile and missional. An undue reliance on counting resources of people and dollars, without also giving attention to measuring progress toward making disciples and making a difference in our communities and world, can undermine the motivation, passion and creativity of a leader’s (clergy and lay) call to the purpose of an entrepreneurial, missional ministry that seeks to find traction in our changed mission field.



Daniel Pink identifies three main drivers that power behavior and have a direct impact on our motivation for doing something. Like versions of software in which later releases are more complex and powerful than earlier versions, he identifies the three drivers as increasingly complex and important:^{vii}

- Version 1.0– biological drivers of survival, hunger and thirst
- Version 2.0– rewards and punishments delivered by the environment (based on two simple ideas: rewarding an activity will get you more of it; punishing an activity will get you less of it.)
- Version 3.0– the intrinsic reward of performance of a meaningful task

We most commonly think of rewards as carrots and sticks – version 2.0. Positive rewards motivate, and so we assume that rewarding congregations and leaders that post good metrics should get us even more good metrics as we seek to change. Lack of good metrics receives the “stick” of not being rewarded, of not receiving attention, or of receiving negative attention. So we find conferences bringing pastors and leaders of congregations that have increased their numbers up on the stage at an annual conference session to recognize (and reward) their good work. Or we find bishops and district superintendents holding public gatherings of those church leaders whose congregations have not fulfilled their apportionment commitment as a negative reward (the “stick” of drawing attention to their lack of covenant commitment). The hope is to reward the behavior we want and to replace the behavior we don’t want. In a North American church world in which the biological drivers of 1.0 have largely been cared for, we have turned our attention to the 2.0 drivers of rewards and punishments to shape the response we believe the mission field calls for. To an extent, this is appropriate. If a system gets what it pays attention to, then we need to help our leaders pay attention to the results that we believe will advance our ministry in the mission field, and we need to address the results that don’t advance our ministry.

Honoring those who are making progress, as well as calling attention to those who are not fulfilling commitments, in an effort of accountability is vital and important to setting the direction of an organization. The real story of motivation, however, is significantly more complex than that, particularly as it relates to ministry, which is highly connected to the human and community conditions of the unique and immediate setting of the people and mission field involved.

To understand this complexity, Pink provides the distinction between “algorithmic and heuristic” work.

An algorithmic task is one in which you follow a set of established instructions down a single pathway to one conclusion. That is, there is an algorithm for solving it. A heuristic task is the opposite. Precisely because no algorithm exists for it, you have to experiment with possibilities and devise a novel solution.^{viii}



Given this distinction, it is easy to see that ministry is a heuristic task. There is no single set of behaviors, no standardized set of steps that will produce a person committed to Christ. The path of discipleship is a wandering search through stages of understanding and commitment, not a checklist of activities to be completed.

With heuristic work, with ministry, goals that people set for themselves and that are connected to mastery of their call, produce great commitment and effort and are judged to be worth sacrifice – motivation version 3.0. However, goals imposed by others have the dangerous effects of narrowing focus, minimizing creativity, decreasing cooperation and supporting short-term thinking that loses sight of purpose.^{ix}

Motivation for the heuristic work of ministry (3.0) depends upon staying connected to the meaning of our work – staying connected to the Gospel good news that promises life as more than just living, staying connected to values of community that seek to break boundaries and address suffering. Yes, we must do our counting and we must recognize those whose “counts” are growing and address those whose “counts” do not contribute to vitality. A system gets what it pays attention to, and we must pay attention.

However, vitality and faithfulness also deeply depend upon continued attention and connection to purpose. Rewards and punishments (2.0), without continued calls to and reminders of purpose (3.0), will not provide either fruitfulness or faithfulness. To move ahead will require continued and increased attention to the other critical steps of heuristic motivation that we are now discovering and using in our changed mission field wilderness:

- Annual conference gatherings that are more focused on worship, spiritual renewal and remembering the purpose of ministry, instead of being focused on regulations, resources or decision making
- Clergy self-directed peer learning groups as continuing professional development where clergy can remember their call, risk their vulnerability and seek to master their call in the company of other seekers, rather than receiving additional information and skills from continuing education “experts” who may or may not be helpful to their setting of ministry
- Small group covenant gatherings of laity where relationships, study, and mission help them form as people of faith, rather than reliance only on committee meetings that plan action or classes that teach about a faith that may or may not challenge people to learn a new way of living
- Governance meetings (at both the conference and local church levels) that incorporate study, prayer and reflection into the discernment and decision making tasks, so that actions are not separated from, but rather informed by, our purpose

One of the great cautions of this moment in our church, when we turn to metrics, is the necessity of finding the right balance between drawing attention to and rewarding not only actions and behaviors, but intent and purpose, as well. We need to learn how to appropriately reward behaviors by attending to our counts, while we also learn how to appropriately reinforce our passion by underscoring and supporting those things that connect us to our purpose.



PRODUCTIVITY (the appropriateness of measures)

And so we come to the third of the cautions – taking care to be sure that our measures are appropriate to, and help to actually produce the outcome that we are after. Here it would seem that the primary rule is not to be too rigid in our metrics.

In their exploration of practical wisdom, Schwartz and Sharpe use the idea of “bending the rule.” In the early days of temple and cathedral construction, “a normal, straight-edged ruler was of little use to the masons who were carving round columns from slabs of stone and needed to measure the circumference of the columns. Unless, you bent the ruler. Which is exactly what the masons did. They fashioned a flexible ruler out of lead, a forerunner to today’s tape measure.”^x Practical wisdom requires knowing how to bend the rule to fit the circumstance. Rigid tools do not help. Rigidity to inappropriate or insensitive measures does not help. Observation and experimentation is needed to learn how to bend the rule in the right direction.

Consider how rigid and insensitive measures impact the performance of other professions beyond ministry. We tend to be well aware of this problem in education where effectiveness is measured by standardized testing of students on material determined to be important to master at each age level. We know that “teaching to the test” overlooks the development of skills and narrows the scope of a child’s learning to the subjects and content on which they will be tested. Evaluating teaching by standardized tests supports memorization as the primary means of learning. Indeed, there was a day in which memorization was an essential tool of the educated person since information was housed in books that resided in libraries, which were often unavailable to people as they worked. However, today information is everywhere and universally accessible to educated people because of the Internet. Memorization, the dominant skill that is being measured by standardized tests, is a poor substitute to the skills of critical thinking that our children need to learn in order to be able to effectively sift through too much information, that is too available, in order to make good decisions and produce clear outcomes. Standardized tests are necessary tools of measure. But to actually address our concerns of whether we are educating our children, we will need to move well beyond rigid measures and bend the rule, so that we are more confident that our metrics are actually appropriate to our intended outcomes.

If we looked at the profession of law, we can see the same dilemma. A common measure used widely in law offices is the “billable hour.” A lawyer’s productivity is measured by money generated by his or her billable hours, usually accounted for in six-minute segments so a lawyer can reasonably estimate the time spent on a client’s questions or problems measured by tenths of each hour. Billing is connected to performance because most law firms recognize and reward performance of individual lawyers by volume of income brought to the firm. While the billable hour is a clear and honest measure of work done, it can be a questionable measure of fulfilled purpose. If the purpose of a lawyer is to give “good counsel” to a client, then rigid adherence only to billable hours may be a misdirection of intent. Billable hours, by itself, may encourage a lawyer to poorly serve a client, not by giving poor counsel, but by making counsel overly complex and demanding because it leads to higher revenue. At its worst, billable hours makes the lawyer’s supervisor, or the law firm itself, the “client” that the lawyer serves since productivity is measured by income, rather than service of good counsel to the customer.



One can easily go on to medicine where effectiveness is determined by insurance payments to the physician, measured by time spent, diagnoses determined, and tests and services provided. The measures are rigid and physicians find themselves shaping their practice to meet the measures. So it is that physicians routinely (unconsciously) begin to make diagnoses of a patient's problem within the first 15 seconds of a visit because payment is based on volume of patients seen in a day. Similarly, because payment is determined by diagnosis and time, physicians so measured will tend to settle on known diagnoses quickly because they fit an insurance provider's diagnostic screen, and the physician has little encouragement to spend time listening to the stories of the patient's life where real clues to illness may be hiding, and little encouragement to consider less "diagnosable" causes to a patient's complaint.

In each case, the rigid measures used within a profession direct the professional's work in a way that may not easily bend itself to the profession's purpose. Keep in mind, once again, that this does not suggest that there is no place for such metrics. It does suggest that the wrong, or the rigid use of measures that do not fully include the purpose of the practice, are not enough.

As argued in this series of monographs, limiting our metrics to the rigid counting of resources and activities is insufficient and, by itself, may be misdirecting. Our categories of counts in the church are insensitive. We count members at a time when people are not looking for membership in organizations. We count professions of faith in a way that can encourage congregations to think of this step as a final mark of discipleship rather than an entry point. We need to include counting, but move beyond the limits of only counting, in order to experiment with measures that will guide us to the real changes that we believe we are called to make.

The opening of this monograph began with a 1963 quote from Martin Luther King that warned of over attention to numbers and size. From the last half of the 20th century into the beginning of the 21st century, attention to size has dominated. Some claimed, at an earlier time, that our numbers indicated the importance of the church; some now point to the numbers as evidence of the irrelevance of the church. Some are hopeful; some are critical. Whatever the size of the church, its purpose is not diminished. In the same sermon, King went on to say, "Many continue to knock at the door of the church at midnight, even after the church has so bitterly disappointed them, because they know that the bread of life is there."^{xi} First, and above all, if we are true to our purpose as the holders of the bread of life, and if we learn to offer this bread to the new cultural mission field around us, then constancy of purpose will care for our counts and measures. Learning to count and learning to measure are simply tools we use to hold ourselves accountable to the purpose upon which we are to stand.



Endnotes

- ⁱ Martin Luther King, from the sermon "A Knock at Midnight". Found in *Strength to Love* (Minneapolis: Fortress Press, 2010) 56.
- ⁱⁱ Mary Walton, *The Deming Management Method* (New York: Perigee Books, 1986). See chapter 1 for a biographical summary of Edwards Deming.
- ⁱⁱⁱ W. Edwards Deming, *Out of Crisis* (Cambridge: Massachusetts Institute of Technology Center for Advanced Engineering Study, 1982) 97-99.
- ^{iv} *Ibid.*, 99.
- ^v *Ibid.*, 121.
- ^{vi} *Ibid.*, 105.
- ^{vii} Daniel Pink, *Drive: The Surprising Truth about What Motivates Us* (New York: Riverhead Books, 2009) 2.
- ^{viii} *Ibid.*, 27.
- ^{ix} *Ibid.* 48.
- ^x Barry Schwartz and Kenneth Sharpe, *Practical Wisdom: The right Way to do the Right Thing* (New York: Riverhead books, 2010) 28.
- ^{xi} King, 61.