



Crafting Professional Guidelines to Help Weigh Healthy & Unhealthy Compromise in Day-to-day Decisions

D R A F T

Developing a workable set of professional guidelines is one of the practical ways to “make it real” when you commit to a mission or set of values as an organization.

Given that every industry has inherent tensions and the potential for unhealthy pressure, and almost every professional job involves the use of discretionary judgment, it is important that you and your team clarify the principles, interests, and values that will guide your professional decisions so you avoid unhealthy compromises. These are what we call “professional guidelines”. They help you and your team stay true to your core mission, giving you practical guidance when you face choices where values are in tension with each other.

Though professional guidelines are critical to any business, they are even more critical in social ventures, values-based businesses and businesses pursuing social and environmental responsibility. Your team’s dedication and faith in the mission, as well as your trusted relationships with external stakeholders, are based on your commitments to pursuing higher principles. Yet these commitments alone are not enough to “keep you honest” amidst the tensions and complexity of everyday decisions and the normal human tendency to incrementally adapt to circumstances around them.

One group that has been particularly proactive about crafting their professional guidelines is Jim Lehrer and the team at the *NewsHour*. In an era when many journalists struggle with the pressure to give short shrift to serving the public interest as well as the bottom line, Lehrer and his team at the *NewsHour* have consistently stayed the course in balancing informative, well-researched stories that credit the viewers’ intellect while running a successful show. To stay clear on what he stands for, Lehrer created his own “code”—a set of guidelines that represents his commitments as a professional. (See figure 7-1.) This simple list elegantly captures the inherent tensions in the industry and provides practical, actionable guidance on where to draw the line day to day in a way that reflects the public’s need to trust his reporting and his commitment to serve the public interest.

Jim Lehrer’s and The *NewsHour* Team’s Professional Guidelines

- Do nothing I cannot defend.
- Cover, write, and present every story with the care I would want if the story were about me.
- Assume there is at least one other side or version to every story.
- Assume the viewer is as smart and as caring and as good a person as I am.
- Assume the same about all people on whom I report.

- Assume personal lives are a private matter until a legitimate turn in the story absolutely mandates otherwise.
- Carefully separate opinion and analysis from straight news stories and clearly label everything.
- Do not use anonymous sources or blind quotes except on rare and monumental occasions. No one should ever be allowed to attack another anonymously.
- And finally, finally, I am not in the entertainment business.

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Having guidelines in place is critical to weighing healthy or unhealthy compromise in the midst of the action. Even more important, they focus your creative energies on the core commitments that enable you to create value, innovate, and maximize your impact.

For example, a small hybrid non-profit/for-profit organization faced a challenge during their startup phase. Due to some delays in getting their production processes set up, they faced a choice about whether to begin business with a less-desirable method of production. They knew they would be doing some good, because all profits went to a charitable organization. But based on their guideline that they were in business to transform production processes in a difficult industry, this would have been an unhealthy compromise for them. They opted to wait until they could open their doors with the improved processes in place.

Developing Professional Guidelines for Your Organization

1. Clarify your distinguishing commitment as an organization.

Revisit your organization's mission, vision and strategy and explore these questions as an organization:

- What exactly are you committing to with the mission, values, and strategy you have adopted?
- What inherent tensions in your industry, business, or role in the organization might make it challenging to fulfill these commitments? In other words, where would it be easy to compromise under pressure?
- What makes you different as an organization, especially in regards to how you intend to respond to these tensions?

Be prepared to uncover divergence among your leadership teams and staff. Just surfacing those differences and inviting the logic behind it can improve your thinking and help you identify what needs to be clarified to put the values into practice.

2. Craft your professional guidelines

As an organization, explore these questions:

- Given our distinguishing commitment, what principles should guide us in making tradeoffs, especially regarding the tensions in our field?
- What simple rules will allow us to sustain these core commitments and still be flexible enough to respond to all the opportunities that are consistent with them?

Craft a few short decision-making guidelines that reflect how you intend to apply your mission, values and priorities in practice, and can help you recognize healthy and unhealthy compromises. The ideal guideline helps you stay flexible and respond to the broadest possible range of opportunities while keeping your commitments to your larger responsibilities and aims real. Start where you substantially agree – then identify the areas where you differ. Use scenarios and examples, not abstract language, to clarify what you mean.

3. Operationalize your guidelines

Identify the kinds of decisions or actions where the guidelines above would apply.

- What are the critical choicepoints when you have the chance to make these commitments real? What are the moments where it would be easy to erode them?
- How can we embed those commitments in our decision-making at those times? How can you leverage everyone's ability to see when they apply?

Identify 2-3 ways to bring your guidelines to attention at those times. You might:

- Post them in a meeting room or add them to a standard agenda
- Build them into contracting arrangements, processes, audits, etc.

See if you can develop a routine that allows for surfacing issues, candid discussion, and responsible action without stalling progress.

The key is not to be perfect or raise the alarm every time you suspect there are discrepancies (unless the situation is truly a violation of your core values), but to get to work on being true to the aspirations you set for yourselves. As you refine these, you will find you become “angular” to the pressures in your industry rather than automatically opposed or completely compliant. Just having the discussion periodically will re-activate and energize the values of your organization, especially if you do so in the context of real-world scenarios or upcoming decisions.