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The Navigation Wheel

Abstract: *When people encounter moral dilemmas at work and have to decide on a course of action, they can respond intuitively or analytically. From the analytic toolbox, they can pick up utilitarian and duty ethics considerations, and the principles of equality and publicity. This chapter adds content to the toolbox by introducing the Navigation Wheel, a figure designed to put ethical considerations into a context where the dimensions of law, identity, morality, reputation, and economy also matter. The Navigation Wheel can assist the decision-maker in keeping track of these six dimensions of the available alternatives. The priority of these dimensions are open to discussion in each separate case.*

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Moral dilemmas call for a careful consideration of options before a decision takes place. Ethics offer analytic tools to engage in a systematic analysis of the alternative courses of action. We have seen that the two main traditions of ethics emphasize different and conflicting aspects of the situation in which the decision is taking place. Duty ethics focuses on respect and human dignity, while utilitarianism instructs the decision-maker to maximize utility and promote the common good, even at the expense of using other people merely as means to do so. We have also seen that the principles of equality and publicity provide guidance for evaluation of the alternatives. Application can take place from a duty ethics perspective, and from a utilitarian one, but also from a perspective that is more or less neutral with regard to the tension between those theories. The decision-maker can consider whether there is a morally relevant difference between option A and option B, without being committed to a particular ethical theory.

This chapter adds to the decision-makers toolbox by introducing the Navigation Wheel, a figure designed by Einar Øverenget and myself (Kvalnes and Øverenget, 2012) to be the central component in ethics training in organizations. We have applied the Navigation Wheel in ethics seminars and courses in a range of different organizations, in the private and the public sectors, and in organizations of different shapes and sizes. The formative idea has been to supply the participants with a simple tool to use in practical settings where they face moral dilemmas and other challenging decision-situations:

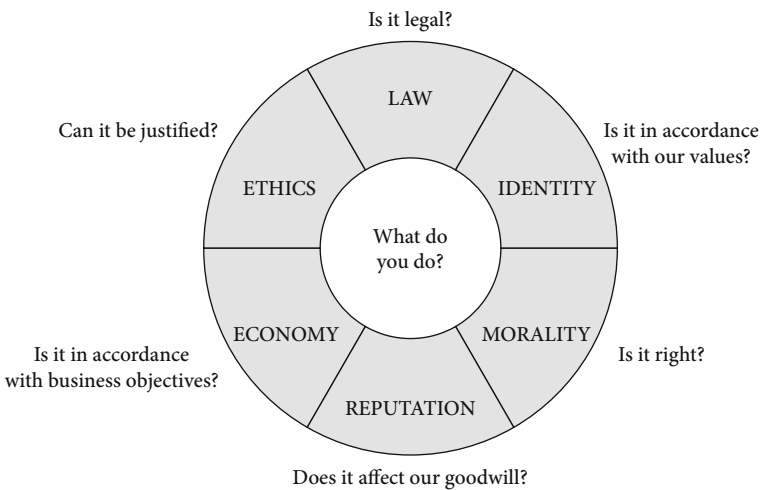


FIGURE 6.1 *The Navigation Wheel*

The set of questions presented in the Navigation Wheel belongs to a family of such analytic sets, from the simple ones such as Blanchard and Peale's (1988): "Is it legal, is it fair, can I defend it?", or Rion's (1990) "Why is this bothering me? – Who else matters? – Is it my problem? – What is the ethical concern? – What do others think? – Am I being true to myself?" More complex approaches are described in van Luijk's eight-question list (1994), the eight-step list of Laczniak and Murphy (1985), the 12-step list of Nash (1989), and the 10-step list from the Markkula-center (2007).

The decision-maker can address the questions in the Navigation Wheel to each alternative, in no particular order. It is also an open issue how to weight and prioritize them. Should ethical considerations trump economical ones, or vice versa? Is morality and doing the right thing more important than reputation? What should one do if the choice is between going economically bankrupt or compromise one's values and go bankrupt with regard to identity? The Navigation Wheel does not build on a particular theory of how to settle such issues. The presentation I give of the six questions below does not indicate, then, that the decision-maker should give them a particular ranking or address them in a particular order.

LAW: Is it legal? This question can involve national as well as international law. If the answer to this question is "no", then any professional person has a strong reason to refrain from performing this action. The laws of a given society may not be perfectly matched with the decision-makers personal morality, and even be at odds with the more or less common morality of ordinary citizens. Nevertheless, an employee in an organization is bound by those laws and owes it to his or her employer to stay within the realm of the legal options.

Civil disobedience is normally something that a person can choose to perform as an individual, not as the employee of an organization. There can nevertheless be cases where we have sympathy with someone who decides to break the law at work. Consider the following case, where the leader of a nursing home faces a dilemma: On a hot summer's day, she receives an offer of fresh mackerel from a local fisherman. She sees this as a chance to arrange a grill party for the residents, where she can serve them excellent local fish, straight from the sea. However, the law on the matter is clear. The residents at the nursing home should only receive food from registered food suppliers. Legal mackerel is controlled, processed, and packaged the standard way, and arrive at the residents' plates

as grey and harmless matter. In this situation, the nursing home leader can decide to take a chance and break the law, since she is convinced that the illegal fish will contribute to a far better culinary experience for the residents than the legal alternative. Her staff can check the fish for bone and harmful materials, and make sure that it will be safe to serve it. It is nevertheless a risk to take. We can see it as an example of good moral luck if there are no negative incidents at the table during the grill party.

One interesting and important asymmetry with regard to the legal aspect is that the illegality of an action provides a reason to refrain, while the legality does not provide a corresponding reason to act in that particular way. There are plenty of legal actions open to a person, that it for other reasons would be unwise to perform. You cannot respond convincingly to the question “How could you do such a thing?” the claim “Because it was legal”. Decision-makers should be aware of this asymmetry of the legal, but many fail to do so. Consider a situation where a communication advisor participates in a public debate about her country’s dominant diary producer, who had come under criticism for trying to squeeze smaller competitors out of the market. She argues that the company has done nothing wrong, and protests intensely against talk of boycotting its products in support of the smaller diary product companies. “I love this company”, she declares in a television debate. What she fails to mention in the debate is that the company she defends also is a customer of her communication bureau. She appears to be a concerned citizen participating in a public debate on her own behalf, but is actually promoting the views of her own customer. When challenged on this issue, she can defend herself by saying that what she has done is legal. There is no law against hiding your professional ties to an organization in a public debate. With a response of this kind, she fails to understand that her critics are not questioning the legality of her participation, but rather its wisdom. More precisely, they raise doubts about the ethical dimension of her initiative in the debate.

We can also revisit Ben and the reference dilemma in order to illustrate the use of the Navigation Wheel. According to Norwegian national law, it is illegal to wilfully mislead a prospective new employer and lie about a person’s social competence in such a situation. You are not legally required to tell everything you consider relevant, but you risk prosecution for lying. Some of the participants in our courses have said that they always give honest answers when they are reference persons, but that they leave it to the questioner to identify the significant issues.

If an employee is somewhat lacking in social skills, and the questioner only inquire about technical skills, then that is his responsibility. You are not legally required to bring attention to issues that the questioner has overlooked or seems to consider irrelevant.

IDENTITY: Is it in accordance with our values? There can be two aspects of the question of identity. I have had ethics sessions with people who are part of particular professions, with their own strong identities. Accountants worldwide identify with the values of integrity and objectivity, while practitioners in health institutions have a long tradition for caring and placing the patient's interest in the forefront. A parallel identity issue concerns the organization's own identity. Since Collins and Porras (1996) documented the significance of core values for stable commercial flourishing, there has been a growing interest in the maintenance of identity. Companies like Sony, Disney, Volvo, and Nike have succeeded in staying loyal to their own core values, and thus managed to establish an easily recognizable identity that they have benefitted from commercially.

How does the identity question affect the circumstances of a business manager Ben, who is the reference-person for an employee he would like to get rid of? I have presented the dilemma in one financial services organization where one of the core values is "team spirit". The participants found that the concept strongly discourages the alternative of being dishonest to a questioner from the same organization. What then about the circumstances where the employee has applied for a job with a competitor? It seems that a situation where he moves on will enhance team spirit. Taken in isolation, then, this value seems to favour being economical with the truth.

Values in the sense described here are not identical to moral values. "Team spirit" can belong to the characteristics of an organization, and come into conflict with moral concerns. It can thus become an issue for consideration whether identity should trump morality, or vice versa. Something may have to give, and it can be a business manager's responsibility to decide which.

MORALITY: Is it right? When considering the moral aspect of a situation, a person's convictions and beliefs about right and wrong set the framework. They can, to a greater or lesser extent be common beliefs shared with other people who have grown up in a similar culture, under similar circumstances, and they affect the moral intuition or gut feeling the person has with regard with what should and should not be done in the concrete situation.

Is it morally acceptable for a reference person to lie about a person's part in conflicts at work? Could we define it as a white lie? Most of the participants in the ethical training sessions I facilitate conclude that the answer is no. From the point of view of morality, they argue, the lying option is clearly unacceptable. Honesty is a central tenet in society as we know it, making it disrespectful to tell lies. As indicated above, some claim that they will not tell a lie, but refrain from bringing attention to dark issues not addressed by the questioner. In arguing that way, they rely on a distinction between what is active and what is passive, favoured by thinkers in the tradition of duty ethics. They are bringing their moral convictions and commitments in touch with ethical theory. From this perspective, you are mainly accountable for the things you actively do and not so much for what you refrain from doing. A utilitarian will challenge this stance, and claim that the active – passive distinction is morally irrelevant. Consequences count, whether they come about through acts of commission or omission. The outcome of Ben's reluctance to convey relevant information about the employee can be that he receives a job offer on false premises. Ben could have stopped it, and he is morally accountable for his decision to keep quiet, according to the utilitarian.

The morality part of the Navigation Wheel is primarily a place to test moral intuitions about the case at hand, and not to engage in ethical analysis, but as the example illustrates, once we articulate a moral standpoint or hear about other people's gut feelings regarding a particular case, it is easy to become engaged in argumentation using ethical concepts.

REPUTATION: Does it affect our goodwill? One of the main conclusions I draw after many years of conducting ethics training with business people is that they are deeply and supremely concerned about their reputation. They consider it a necessary asset in order to reach strategic and economical goals. It takes years to build good reputation, but it can be lost very quickly, is a commonly held view in business communities.

Business leaders will protect their reputation even if that demands admitting to wrongdoing in cases where they have in fact acted responsibly and wisely. When the oil company Shell made plans to dispose of the redundant oil storage facility Brent Spar, they consulted environment specialists. The advice they got was that the safest option, both from an environmental and from an industrial health and security perspective, was to dispose of the construction in deep Atlantic waters. British authorities accepted the plan as the Best Practicable Environmental Option (Zyglidopoulos, 2002, pp. 141–143). The activist

group Greenpeace protested, and started a campaign leading to widespread boycott of Shell service stations in European countries. In the end, Shell decided to abandon the plan, in order to save reputation and avoid economic disruption. The company claimed that they needed to identify a better storage plan, although their own studies showed that deep-sea disposal outside Scotland was optimal from an environmental perspective. Later, Greenpeace had to acknowledge that the organization had grossly overestimated the environmental damage of the proposed disposal of Brent Spar. By that time, however, they had won the fight with Shell, and the media was only mildly interested in Greenpeace's use of false numbers (Shell International, 2008). Bowie and Dunfee (2002) have questioned the wisdom of giving in to pressure in order to save reputation in such cases.

In ethical training, my general approach is that each person and each working environment must decide how to rank the questions in the Navigation Wheel. However, I do point to some disadvantages of giving top priority to reputation. For one, succumbing to media pressure can have a negative effect on internal morale. Insurance companies sometimes give in to such pressure and hand out money to customers who are not entitled to it. They choose this option rather than attempt to correct what they see as the distorted picture painted in the press. For the companies' employees such capitulation can be a bitter blow to their motivation.

This is not to deny that reputation matters. Ben has good reasons to be concerned with the effect on his reputation in the aftermath of his efforts as a reference-person. However, such considerations often take the attention away from the identity and morality dimensions of the options, and instead focus on appearance. I once encountered a company whose identity and values statement on their webpage said: "We want to be perceived as an honest company". The focus, then, was not on actually being honest, but on maintaining an image of being an organization with that quality. The language of reputation had taken over from, or been confused with, the language of values. If the claim accurately expresses the dominant attitude in the company, we can expect that the motivation for honesty is shallow and frail. It only emerges when there is a chance of scoring reputation points, and not when public attention is absent.

Reputation can of course be a genuine and legitimate concern for the decision-maker. As noted in the discussion of the case where Professor

Clare faces the option of keeping an iPad given to her by a student, other people's perceptions can be crucial. The professor can be convinced that the student gave her the iPad to express gratitude, and not to cash in any improper advantage later. She would be wise, however, to take into account not only what she takes to be the reality of the case, but also how it may reasonably appear to relevant others. Her reputation amongst students may suffer significantly if the iPad story reaches them, and this gives her a good reason not to keep it.

ECONOMY: Is it in accordance with business objectives? The inclusion on economy as one of the dimensions to take into consideration in ethical analysis raises eyebrows. Why is the question concerning business objectives addressed at all, when the topic of the day is moral dilemmas? It seems that economy and ethics belong to different spheres, and that profitability is not an issue to bring up in the ethical training in organizations.

Many of the most significant moral dilemmas do involve the balancing of economic considerations with other dimensions of the situation. As noted earlier, the choice under a given set of circumstances can be between going economically bankrupt or bankrupt with regard to identity. There may be legal and profitable options available, which are at odds with the basic values a company traditionally has stood for. By choosing such an option, the company in a significant sense ceases to be the unit it has been. It may keep its name and address, but the break with one or more core values means that the identity is different now. A transformation has taken place.

With regard to Ben and his options in the reference dilemma, he can have short term as well as long term economical concerns. In the short term, results may improve if he keeps his lips tight about the employee's involvement in social conflicts. The working environment will probably respond with relief, and gain new energy with the removal of the cause of so much frustration. In the long term, however, this risky enterprise may backfire on the unit as a whole, and disrupt its ability to perform profitably. The economic dimension of a moral dilemma, then, warrants a consideration of short term and long terms benefits.

ETHICS: Can it be justified? This question invites a consideration of the alternatives in the light of ethical theories and principles from earlier chapters. The decision maker can compare and analyse the available options from a utilitarian or a duty ethics perspective, and by applying the principle of equality and the principle of publicity.

In the discussion and analysis of a particular dilemma, the focus can be on all six of the dimensions addressed in the Navigation Wheel, or it can be on the tension between the answers we receive to two or more of the questions. The decision-maker can face a choice of giving primacy of economy (here we have a potentially profitable business option) or identity (it is not really us to act that way). The dilemma can be to prioritize between ethics (according to the principle of equality we can do this) and reputation (it may nevertheless harm our public image), or between law (it is illegal) and morality (I believe it is the right thing to do), and so on.

The main purpose of the Navigation Wheel is to assist the decision-maker in his or her efforts to analyse the available options and keep track of the relevant dimensions of the situation. Is a person who has participated in ethics training and become familiar with the Navigation Wheel better equipped to deal with moral dilemmas and work, and less likely to engage in serious moral wrongdoing? Organizations who hire me to conduct ethical training obviously hope so, but I think there are limitations to what we can achieve simply by making people familiar with tools of ethical analysis. If all it took to establish responsible conduct in organizations was ethical tools, this book could have ended here, with the presentation of the Navigation Wheel as the final analytic device to apply when facing moral dilemmas. Instead, it continues, to attend to how even people with excellent analytic skills, well trained in the use of the three versions of the categorical imperative and in other ethical principles, can become involved in moral wrongdoing at work. Even the ancient idea that tough moral decisions can be safely left to people of particularly strong and stable moral character, will come under critical scrutiny in the remaining chapters.



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