

Taylorism and the Mutual-Gains Strategy

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Through the interwar years, disciples of Frederick W. Taylor built and sustained an alliance with organized labor that centered on the development of what has become known as the mutual-gains enterprise. This article examines this association, tracing its origins and evolution. In the process it challenges the tendency, common within the industrial relations community, to equate Taylor and Taylorism with authoritarianism and the exclusion of workers from the management process.

THE ALLIANCE SUSTAINED BY ORGANIZED LABOR and the disciples of Frederick Winslow Taylor through the interwar years has been documented extensively (Slichter, 1941; McKelvey, 1952; Nadworny, 1955; Derber, 1970; Jacoby, 1983). Despite the ready availability of this literature, most industrial relations analysts continue to equate Taylorism with antiunionism, mechanistic job tasks, and the exclusion of employees from workplace decision making. This perspective appears, for example, in the recent "mutual gains" literature that promotes a productivity-centered industrial relations strategy that involves unions and managers working together to eliminate obstacles to greater efficiency and to strive for a significant mutual payoff (Cohen-Rosenthal and Burton, 1986; Kochan and Osterman, 1994). Indeed, a number of advocates of this strategy have asserted that its success requires an explicit rejection of Taylorism (Best, 1990; Jurgens, Malsch, and Dohse, 1993; Kochan, Katz, and McKersie, 1994). This hypothesis is refuted in this article, which argues that Taylor and his inner circle advocated policies closely resembling those proposed by the mutual-gains theorists. The article focuses on

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developments in the Taylor Society, a body founded by Taylor's inner circle that had as its primary purpose the development and diffusion of his philosophy of management. It begins by examining the evolution of Taylor's ideas and the continuity of his thought with that of his disciples in the Taylor Society, proceeds to outline the evolution of the union-Taylorist alliance, and concludes with some observations as to what we might glean from the interwar attempt to promote the mutual gains strategy.

Taylor and Taylorism

Taylor remained forever constant in his belief both that management must be based on scientific principles, rather than on rule of thumb, and that the benefits of his system of management would flow to both employer and worker. However, his notion of what was required to facilitate the attainment of these goals underwent a process of continuous evolution (Kelly, 1982). Through much of his career he believed that a rigorous commitment to measurement and scientific method was the key to effective management. Measurement and scientific method were tools that he applied to such issues as plant layout, the improvement of machinery, cost accounting, and the "labor question." By 1901, his never-ending battle with "financiers" who insisted that science must remain subordinate to profits convinced him that a third factor was critical if management was to be developed as a science. This third factor was the independence of the technician, an individual who must strive to be an expert of the highest order and a professional who could be trusted to make rational, nonpartisan, and informed decisions. As a consequence of this belief, Taylor henceforth refused to accept payment for his services and became highly vocal in his criticism of worker organizations and capitalists who were willing to restrict the independence of the technician to further personal gain. This was a development that was received sympathetically by antimonopoly Progressives who, particularly after the Eastern Rates case of 1910, applauded both Taylor's commitment to science and his criticism of the restriction of output by the unions and the "trusts." In so doing, however, Progressives also expressed concern that Taylor's attempt to concentrate workplace knowledge in the hands of management was providing the employer with a knowledge monopoly that the latter was bound to misuse.

Taylor's response to this charge was to stress the mutual benefits inherent in his approach to management. This is apparent when he observes that the "principal object of management should be to secure the

maximum prosperity for the employer, coupled with the maximum prosperity for each employee.” He also insisted that misuse of scientific management could not occur because central to his system was “friendly cooperation” between worker and manager. That this response was not perceived to be an effective reply was made clear by both Progressives and organized labor. As a result, through the last years of his life Taylor gave increasing attention to the problem of how the power of the various industrial actors could be balanced in a manner that would enable management to be accorded the space it needed to develop as both a science and a profession.

Taylor’s claim that his system of management would benefit both worker and employer was accompanied by a call for the partners in production to work together to enhance the output of the firm. The pursuit of mutual benefits and cooperation as regards the enhancement of production amounts to a mutual-gains approach to industrial relations as the notion is understood by analysts such as Cohen-Rosenthal and Burton, and Kochan and Osterman. That Taylor advanced a mutual-gains program is seldom recognized because it is thought that he believed that the primary contribution workers could and should make to productivity enhancement was to do as they were told. However, while this depiction predominates, it has not gone unchallenged. There is a range of views on Taylor and Taylorism that can be divided into three basic sets. The least developed category ignores the evolution of Taylor’s ideas and equates Taylorism with systematic work design. Thus Wright (1995, p. 26) defines scientific management as a work design system distinguished by “‘scientific’ work measurement and job analysis techniques.” This view has the virtue that it highlights the quantification and precision that were so important to Taylor. However, it lacks refinement because it fails to acknowledge both the breadth of Taylor’s work and the fact that in the first half of the century Taylor was but one of many management theorists who urged the need for work measurement and job analysis. As a result of their failure to heed the latter fact, advocates of the technique-centered perspective invariably fail to differentiate Taylor’s use of these tools from their use by other management theorists. Indeed, these scholars often collapse liberal systemizers, such as Morris Cooke, in together with conservatives such as Henry Ford and fascists such as Charles Bedaux, with all being simply categorized as scientific managers or Taylorists.

A second body of literature is characterized by its awareness of the need to distinguish between schools of management thought. This literature differentiates, for example, between the ideas of Taylor and Henry

Ford, both of whom embraced work measurement and job analysis. In its less sophisticated form, recognition is limited to asserting that the two men diverged in the degree to which they degraded labor. However, others have recognized that while Ford sought to systematically deskill workers, being convinced that his employees should “learn their jobs within a few hours or a few days” (Ford, 1922, p. 79), this was not true of Taylor. Rather, this body of scholars acknowledges that Taylor in fact insisted that scientific management requires of managers that they systematically train, assist, and teach workers so that each can perform “the highest grade of work for which his natural abilities fit him, and it further means giving him, when possible, this class of work to do” (Taylor, 1911a, p. 9). Where the latter group of scholars primarily fault Taylor is in relation to his supposed exclusion of workers from workplace decision making. A third body of literature denies this claim, arguing that Taylor’s system required interactive communication and hence allowed for intellectual input both from worker and manager. Management trains and supplies employees with the information they need to do their jobs, but managers in turn must listen to workers’ views and react with respect to the information received (Hathaway, 1917, p. 17; Schachter, 1989, pp. 44–45).

One piece of evidence that proponents of the participative view of Taylor can point to is the interwar alliance between the Taylor Society and organized labor. It has been replied, however, that while the alliance shows that Taylor’s followers were capable of embracing unionism, this was not true of Taylor himself. Thus Cohen-Rosenthal and Burton (1993, p. 15) assert that while “Frederick Winslow Taylor had little patience for unions, his followers learned the value unions bring to creating a better workplace.” Those who argue for this two-stage evolution of Taylorism dismiss as mendacity Taylor’s often repeated claim that he was willing to work with unions that rejected output restrictions and accepted efficiency wages. Nadworny (1955) has built the most detailed case to support this accusation in *Scientific Management and the Unions 1900–1932*. He bases his claim on his reading of Taylor’s private papers, Taylor’s last public statement on unions, and the study *Scientific Management and Labor* that was published by Robert Hoxie in 1915. However, an examination of Nadworny’s case reveals that he advanced his claim with excessive confidence. The papers cited do reveal that Taylor never moderated his opposition to compulsory unionism or accepted that all employment and production issues should be decided by bargaining. However, the documents do not justify the assertion that Taylor believed that there was no place in his approach to management for unions or collective bargaining. Rather, they suggest that in his last years Taylor concluded that while

he could not collaborate with “warlike” unions, he could work with unionists willing to embrace a mutual-gains strategy.

A similar conclusion is reached if Taylor’s last public address on unions is examined, this being a statement on which Nadworny placed great emphasis. The background to Taylor’s address and a close reading of the declaration make it clear that Nadworny’s interpretation is unduly selective. The 1914 address capped off a year that saw Taylor, his colleagues, and the union movement begin sounding out the possibility of a rapprochement. In January, Taylor’s friend Charles McCarthy convinced the Federal Industrial Relations Commission to undertake a study of scientific management in relation to labor (Nyland, 1996). Immediately prior to the commission hearings, Taylor provided A. J. Portenar, of the Typographical Union, with a tour of plants he had rationalized, and the following month (April) the members of the Taylor Society debated the relationship between organized labor and scientific management.

The debate was opened by Morris Cooke, an engineer described by Jacoby (1983, p. 21) as Taylor’s “favored disciple” and who Layton (1986, pp. 152–157) notes was the source of Taylor’s ideas as to how democracy and efficiency could be reconciled. Over the previous decade Cooke had worked closely with Taylor in his struggle against corruption in the engineering profession and the misuse of monopoly power by public utilities. He also had a major input in the writing of the *Principles of Scientific Management*, his contribution being sufficient to cause Taylor to offer him an equal share of the royalties. In the process of the society’s debate on the labor question, it was made clear that those present believed that union hostility to scientific management was one of the “big problems” that had to be resolved. Cooke suggested that it was the duty of society members to better acquaint themselves with labor’s goals, a suggestion that was accepted by the members present, as was the need to make a greater effort to educate labor on the objectives of scientific management. Shipley, a former union activist, told the meeting that when he had first heard of scientific management he had been deeply cynical and only modified his views when he came in direct contact with Taylor’s inner circle. He added “that if those interested in scientific management would meet with labor in their forums and freely discuss the subject with them on their own ground the advancement of management principles would proceed rapidly in the labor camp” (Taylor Society Minutes, April 4, 1914).

Taylor attended the society’s April meeting and 10 days later addressed the Industrial Relations Commission. When so doing, he took care to emphasize that he was a “union man” and had never encouraged workers to leave their unions or discriminated against unionists. He also agreed

that in dealing with older forms of management, unions must remain fighting organizations and that while combative bodies were not required under scientific management, he was convinced that productivity-focused unions had a primary role to play. He concluded:

I never look for the unions to go out. I am heartily in favor of combinations of men. I do not look for a great modification in the principles of unions as they now exist; they are of necessity largely now fighting organizations; I look for educational institutions, for mutual and helpful institutions; I look for great modifications, but never for the abolition of them. I simply look for a change, that the union shall conform itself to this new idea, the idea of a standard that is over all of us, and a set of laws that will be over all sides [Taylor, 1916, p. 810].

When giving his testimony, Taylor was urged to explain who decided if, after investigation of the laws governing a given issue, there remained an honest difference of opinion between manager and worker. When formerly challenged on this critical issue, he had tended to ignore the power relation between employee and employer and had asserted that in such a case the employee could simply refuse to obey the employer's instructions. Having been made very much aware by labor that this reply was inadequate, Taylor, on this occasion, conceded that an alternative to individual employee action was needed. Possibly influenced by his recent acquaintance with the Australian compulsory arbitration system, he suggested that one possible solution would be the establishment of an independent tribunal "to which you could refer these things. . . . I look forward to the day when the United States government will furnish a tribunal of that sort" (Taylor, 1916, p. 806).

Taylor's comments to the commission extended the placatory overtures he had made repeatedly over the previous 3 years. However, what made the occasion unique was the response of the unions. While remaining wary and critical of the Taylorists, all but one of the unionists who subsequently testified indicated that organized labor was now willing to explore Taylor's apparent desire for a rapprochement. This development was taken furthest by the secretary-treasurer of the AFL Metal Trades Department, who asserted that "if the engineers had made any attempt to explain their system to the unions and to win their cooperation, much of the opposition would have melted away" (McKelvey, 1952, p. 21).

Taking the unionists at their word, Taylor immediately put into practice Shipley's suggestion that scientific managers should be willing to enter the forums of organized labor. At the end of April he accepted an invitation to address the Wisconsin Federation of Labor, where he reiterated that he was not opposed to unions and that his management system was designed to benefit the worker. Following his speech, he was denounced

by a long-time antagonist who called on the Wisconsin board to condemn scientific management. This demand was refused, the board electing instead to simply withhold recommendation for the system, an outcome Taylor saw as less than satisfactory but which Nadworny correctly notes was in fact a major victory for the Taylorists.

The following month, the ongoing union-Taylorist search for common ground saw the Taylor Society devote part of its May meeting to the "methods of enlisting the co-operation of labor in the movement for scientific management." Such efforts were continued through the following months and in September were rewarded when Gompers informed Hoxie that he had come to the conclusion that "the great obstacle to any . . . agreement by employers and employees upon scientific management has been the refusal of the employers to recognize the union" and that if this issue were resolved, it was probable the Taylor system could be transformed from an "injurious" to a "beneficial" program (Gompers to Hoxie cited in Nadworny, 1955, p. 89). Taylor, in turn, advised Hoxie that while he remained convinced that scientific management could render "collective bargaining and trade unionism unnecessary as means of protection to workers," he welcomed the "cooperation of unionism" in the development of management science (Taylor in Hoxie, 1915, p. 147).

This brings us to Taylor's last public statement on labor, which was delivered a month after Gompers' letter was sent to Hoxie. In his analysis of the statement, Nadworny notes correctly that Taylor continued to reject the notion that all issues relating to employment should be decided by collective bargaining (Nadworny, 1955, p. 77). However, in so doing, he ignores the fact that Taylor also stated that he welcomed the chance to collaborate with unionists who accepted the need for increased output and an efficiency wage. Also ignored is Taylor's reply to the charge that he denied unions a place in the management process. Here Taylor proposed a new means of containing the ability of employers to misuse the techniques associated with scientific management. He asserted that this danger could be overcome by having the appointment and hence the control of efficiency engineers undertaken jointly by employer and union. Indeed, he stated: "Any company that has any sense at all would be delighted to have the union appoint an expert and the company would be willing to pay the wages" (Taylor, 1914, p. 3). He concluded his address by asserting

If the unions will take up the education of their members, it will be a step in the right direction. They will have to take this step before we can cooperate with them. Instead of preparing for war they must try to promote working conditions which render possible higher wages. The unions have done an immense amount of good. Unions have made better working conditions. They have stopped great injustices in the trades and for that they deserve commendation. Because a man

points out that they are doing a few things that are wrong it does not mean that he does not tolerate anything that they are doing [Taylor, 1914, p. 3].

The final factor used by Nadworny to justify his charge that Taylor remained implacably antiunion is the Hoxie report of 1915. This is a study that Nadworny assumes is a balanced account of Taylor's activities in industry. It is held to be balanced because it is believed the Taylorists were represented on Hoxie's investigating committee by Robert Valentine, an individual whom Nadworny accords primary credit for initiating the subsequent union-Taylorist alliance. However, the value of this aspect of Nadworny's case has been undermined recently by the revelation that Valentine had no practical experience of scientific management and was appointed to Hoxie's committee over Taylor's express opposition. It also has been revealed that it was not Valentine who initiated the union-Taylorist alliance, this honor belonging rather to Louis Brandeis, C. B. Thompson, and Robert Wolf. All these Taylorists worked for a rapprochement between organized labor and scientific management for several years before Valentine made his appearance. Taylor's desire to build a bridge to the unions is also evident in the fact that even after it became apparent that Hoxie was going to submit a hostile report, he urged his disciples to cooperate with Hoxie's committee for as long as there remained the chance that cooperation might diminish the hostility of even one unionist. Finally, Hoxie's report is diminished by the fact that when it was published, it was widely judged a biased document and was so poorly received that Hoxie committed suicide (Nyland, 1996).

Taylor died in March 1915. Consequently, whether he would have taken the rapprochement between organized labor and scientific management to the extent that eventually developed is unknown. However, given the direction in which Taylor's thought had evolved, it cannot be accepted that the Taylor Society members who built the alliance were "second generation" activists who pioneered a variant of scientific management that he would necessarily have rejected. A number of the technicians who helped develop the alliance worked closely with Taylor for many years. Sanford Thompson, for example, first became Taylor's close associate and disciple in 1890 and remained with him till his death. Thompson's views are important because in 1915 he joined with Louis Brandeis, then arbitrator of the joint union-employer board that managed the "Protocols of Peace" governing industrial relations in the New York textile industry. Brandeis saw the protocols as a vehicle for introducing "joint control and with joint control a joint responsibility for the conduct of the industry" (cited in Fraser, 1991, p. 83). In pursuit of this goal, Brandeis convinced the Waist Manufacturers' Association and the International Ladies

Garment Workers Union (ILGWU) to jointly appoint Valentine as an impartial director of a Board of Protocol Standards. This body was asked to study production practices and recommend procedures that would increase efficiency and safeguard employment since Valentine did not have adequate technical expertise, he asked Thompson to oversee this aspect of the project (Nadworny, 1955, p. 99). Hence, within months of Taylor avowing his support for joint union-management governance of scientific management, his proposal was put into practice by a “first generation” disciple.

The foregoing examination of the evidence suggests that Nadworny’s assertion that Taylor remained implacable in his insistence that scientific management had no place for unions has not been supported adequately. Rather, the evidence warrants the conclusion that while Taylor’s position on unions remains somewhat ambiguous, his ideas evolved in the direction of being more supportive of organized labor in the last years of his life and that he did seek to find some means by which organized labor could have a voice in the management of the workplace. As he came to appreciate the degree of hostility his ideas had generated within the labor movement, he responded by striving to find some means by which his commitment to scientific method and his desire for “friendly cooperation” between worker and manager could be reconciled when it was necessary to deal collectively with employees. Given this response, the positing of a sharp break between Taylor and those of his disciples who subsequently promoted the mutual-gains strategy appears unjustified. Hence Taylor deserves recognition as an early or at least a protoadvocate of the mutual-gains strategy, and the participative view of what might be considered “late Taylorism” appears justified.

The Union-Taylorist Alliance

If Taylor’s last observation on unions help explain the rapid post-1914 development of the union-Taylorist alliance, of equal importance was the role played by the state during World War I. Seeking to encourage enthusiasm for the war effort, the federal government promoted the notion that the United States was fighting a “Great War for Democracy.” In so doing, it gave legitimacy to new forms of industrial democracy, a notion that was embraced by labor to an extent that was unprecedented. This enthusiasm was shared by Taylor Society members, many of whom took employment with the government through the war period and consequently joined unionists on the many tripartite production committees established by the Wilson administration. Seeking to extend this collaboration, Morris

Cooke and other “first generation” society members urged the government to extend the incorporation of the unions into the management of the war effort. These solicitations were well received by the AFL and by independent unionists such as Sidney Hillman. The unionists’ positive view of these efforts was further boosted by the support the Taylorists gave to a minimum wage, collective bargaining, the 8-hour day, and equal pay for equal work. The general trend of this period is best captured by Fraser, who observes

During the war Cooke and the Taylor Society drifted steadily to the left. The Society’s formal conception of the industrial polity became increasingly syndicalist, envisioning the democratic integration of functional groups in a rationalized production system. Society members were enamored of the wartime shop committee system, seeing in these committees schools of worker self-management [Fraser, 1991, p. 133].

Immediately after the war, the Taylor Society cemented its union links by joining with labor in launching a major productivity campaign. Important steps in this campaign were the AFL’s 1918 call for worker production committees in all large firms; the 1919 publication of *Labor, Its Grievances, Protests and Demands*, in which the AFL urged “cooperation between the scientists of industry and the representatives of organized workers”; the Taylor Society’s endorsement of the 1919 coal and steel strikes; Cooke’s appearance at the first International Labor Office Congress as Gompers’ technical adviser; and the 1920 publication of *Labor, Management and Production*, which called on unions, technicians, and employers to unite in a crusade against waste and which was edited by Gompers and Cooke together with Fred Miller of the Taylor Society.

So began the union-Taylorist campaign to develop a mutual-gains model of industrial relations based on science and a participative form of collective bargaining. The essence of the strategy was captured by William Green, Gompers’ successor as head of the AFL, in a 1925 address to the Taylor Society:

Many of our older concepts are giving way. . . . Management is understanding more and more that economies in production can be brought about through the cooperation of labor and the establishment of high standards rather than through the autocratic control and exploitation of labor. Labor is understanding more and more that high wages and tolerable conditions of employment can be brought about through excellency in service, the promotion of efficiency and the elimination of waste [Green, 1925, p. 245].

Such declarations by organized labor were reciprocated by Taylor Society members who through the interwar years repeatedly voiced support for collective bargaining and for labor’s right to a significant place in all areas of management. In embracing the mutual-gains program, however,

the society remained committed to Taylor's belief in scientific method, and hence, while Cooke was ardent in his support for collective bargaining, he remained true to his mentor in refusing to accept that all aspects of the employment relationship could and should be decided by bargaining power. Optimal hours of work and worker fatigue, for example, were issues he accepted as influenced by factors that exist independently of social relations and bargaining power. These material issues needed to be recognized and melded with collective bargaining, a process that required the "light and science" only the technician could contribute. Indeed, in classic Taylor tradition, Cooke told the AFL in 1927 that it must accept that bargaining power could not be the sole factor determining employment conditions and urged the unions to recognize the need to employ economists, statisticians, and other technicians. The employment of these individuals was needed, he insisted, because "even the safeguarding of individual rights and human freedom itself may have become largely a technical issue" (Jacoby, 1983, p. 24).

The Taylor Society was unrivaled in interwar U.S. management circles in the extent to which it supported liberal management thought and practice. As Harris notes,

The Taylorites were perhaps the most interesting, certainly the most articulate, managerial advocates of a less horny-handed approach to everyday industrial relations in the teens and twenties. In the readiness some of them showed to work with and through existing trade unions and to integrate them into their plans for maximizing enterprise-level efficiency and pursuing interfirm rationalization and industry planning, they were unique [Harris, 1993, pp. 58–59].

The liberalism of the society is reflected in the firms that were its corporate members, the list including progressive U.S. enterprises such as Kodak and Macy's and British firms such as Cadburys and Rowntree. The society's liberalism is also indicated by the academics who became members in the 1920s. Those of special interest to industrial relations analysts include C. Canby Balderstone, J. Douglas Brown, Nathaniel Burleigh, Herman Feldman, George Taylor, Ordway Tead, Joseph Willits, and Mary Parker Follett.

However, while Taylor Society members were as one in their support of liberal management, there was divergence in their thought. For example, Henry Dennison, the 1919 president, supported collective bargaining but could not accept that workers must belong to independent unions. In his own firm he encouraged a company union founded on a mutual-gains relationship that was both highly participative and produced decided win-win outcomes. Cooke, by contrast, while accepting that company unionism was not always an instrument for preventing workers gaining true

representation, concluded that too often this was the case. Hence he insisted on the need for multifirm bargaining and independent, national unions. This debate continued through the 1920s, culminating in December 1928 when Cooke gave a presidential address to the society in which he denounced company unionism and urged members to accept that independent unionism was a “deep social need” that society members should strive to extend. In so doing, he also observed:

If we should come to look upon some organization of the workers, such as labor unions, as a deep social need, might it not develop that practices, however otherwise enlightened they may be, which withdraw any group of employees from the support of such organizations, may become anti-social? If such proves to be the case, any employer setting up working standards, even *above* those demanded by labor organizations, and resisting the effective organization of his employees, may in fact be acting without a due regard for this deep social need [Cooke, 1929, p. 3].

When it became clear that Cooke had the support of the annual conference, Dennison stormed out of the meeting and henceforth had little to do with the society. The organization, having expressed its position, remained firm and, indeed, the following year deferred its annual conference in support of independent unionists who were striking against the introduction of the authoritarian system of industrial rationalization developed by Charles Bedaux.

While the 1920s mutual-gains campaign drew support from the AFL, independent unions, and the Taylor Society, it elicited interest from only a very small minority of employers. The latter generally insisted that decisions relating to investment, production, and even employment conditions must remain their prerogative. In short, few employers refused to concede to organized labor a place in management preferring to continue with traditional forms of organization or, if accepting of the need for systemization, choosing an approach more closely aligned to that advocated by Ford than Taylor. This response confirmed Cooke in his belief that without the pressure that only independent unions were able to exert, employers would not give serious consideration to the mutual-gains model.

A small minority of enterprises, however, did experiment with the mutual-gains strategy, though the firms that did so tended to be either unionized enterprises, in difficult economic circumstances, or firms managed by individuals ideologically committed to industrial democracy. One such company was the Baltimore and Ohio Railroad, whose “B&O plan” was begun in 1924 by Otto Beyer of the Taylor Society. The plan centered on joint shop committees that discussed production methods, waste elimination, health and safety, and scheduling. It proved highly successful in enhancing the competitiveness of the firm and as a consequence

was emulated by a number of other railroads (Cohen-Rosenthal and Burton, 1993, p. 16). Experiments with the mutual-gains strategy also occurred in the coal industry, where it was assisted by Mary van Kleeck, a Taylor Society executive member and an advocate of the socialization of the mining industry under consumer and worker control.

The most significant experiments with the mutual-gains model, however, took place in the garment industry, where Sidney Hillman and the Amalgamated Clothing Workers Union developed a relationship with the Taylor Society that was fundamental to the union's attempt to extend the realm of collective bargaining. Hillman also collaborated with William Leiserson and other members of the Wisconsin school of industrial relations through the 1920s and in so doing capitalized on their commitment to collective bargaining. However, what Hillman and his Taylorist allies refused to embrace was the Wisconsin school's belief that union-management cooperation ought to be confined to bargaining over such issues as job security, employment conditions, and the preservation of due process. Within these parameters, the Wisconsinites defended workers' freedom without question. What they denied was that bargaining should embrace investment; technical questions involving the layout and deployment of machines, materials, and workers; or personnel issues having to do with selecting, transferring, and promoting employees. These issues they considered the prerogative of management. The union refused to recognize such limits on union-management cooperation and, with technical assistance provided by the Taylor Society, strove to expand union involvement in workplace decision making at every level. As a result, a mutual-gains model was established in the garment trade that enabled the union to participate in rate setting, influence the appointment of foremen, finance weak enterprises, negotiate the introduction of new technology, and plan the development and marketing of new lines (Lichtenstein, 1993, p. 117).

Many Taylor Society members participated in the development of the mutual-gains model in the garment trade. Morris Cooke, for example, was a member of the Cleveland Board of Referees, a body under joint control of the unions and employers and also was final umpire in disputes over production standards. However, the best known Taylor Society member associated with the mutual-gains model in the garment industry, as far as industrial relations scholars are concerned, was George Taylor of the Wharton School. In his position as permanent arbitrator in the Philadelphia hosiery industry, Taylor assisted the establishment of an encompassing model of arbitrated industrial relations that became widely known and admired and which Lichtenstein (1993, p. 120) has observed came in the 1930s to enjoy "a social and ideological weight that cannot be overestimated."

Depression and Revival

Taylor Society members played a significant role in virtually all the important mutual-gains experiments of the 1920s, and at the end of the decade were confident that the model would be extended throughout industry. However, with the onset of the depression, employers abandoned most of these experiments in favor of adversarial policies that they believed would enable immediate survival of their enterprises. This was a major setback for the mutual-gains campaign but was not its demise. Through the period of the early New Deal the Taylor Society campaigned together with Senator La Follette and Sidney Hillman to have the federal government enact legislation that would strengthen the scope of bargaining beyond that eventually conceded by the Wagner Act. When these efforts proved unsuccessful, they turned their attention to maximizing what could be gained from the new act and the revival of unionism that began from 1935.

Noteworthy in the new effort was the Taylorists' 1937 annual conference. By now the Taylor Society had become the Society for the Advancement of Management (SAM) due to its amalgamation with the Society of Industrial Engineers. Cooke addressed the conference and reiterated his support for the mutual-gains model, noting that for 20 years he had argued that all participants in industry must be actively involved in every aspect of management. Similarly, Henry Metcalf insisted that it should be an industrial principle that "every functional group involved in carrying out a policy be represented in deliberations where the policy and the general methods of its execution are decided" (Metcalf, 1938, p. 42). He also advised that if industry wanted "genuine co-operation from all members of a working group, it has now become plain that a price must be paid—the price of admitting them as more nearly equal partners in the conduct of the enterprise" (Metcalf, 1938, p. 40).

The 1937 conference clearly demonstrated the continued commitment of the Taylorists to the mutual-gains model and in so doing makes clear why, when they saw the chance, these activists sought to again put into practice what Trombley (1954, p. 182) has termed the "old scientific management theories." An important step in the new campaign was Cooke's 1938 publication of a paper in the *Federationist* entitled, "Preparedness Plus: Democracy Knocks at Industry's Door." Cooke argued that the threat posed by fascism required the United States to prepare for the possibility of war. He also warned that this need would lead employers to the claim that war preparation required a lowering of labor standards. This danger, he believed, was best countered by insisting that unions must be allowed to play a significant role in management of the preparedness

program. He was aware that employers remained opposed to that “which we shall call—for want of a better name—Labor-Management Collaboration for Increased Production” but predicted that this opposition would diminish as organization and legislation further strengthened union rights (Cooke, 1938, p. 140).

Cooke’s paper attracted the attention of union leaders, with a positive response coming from the AFL, which, through 1938–1939, published a series of articles calling for an expanded role for unions in the management process. Officials of the Committee for Industrial Organization (CIO) also took up the call, with particular enthusiasm being shown by Sidney Hillman, Clint Golden of the Steel Workers Organizing Committee, and Philip Murray of the United Mine Workers of America. The willingness of the garment unions to reactivate the mutual-gains program reflects the success they had achieved with the model in the 1920s. That it was embraced by the steel and coal unions also reflects the long-term association the leaders of these unions had with the program. Clint Golden had been active in the garment industry and was associated with the B&O plan in the 1920s, whereas Murray had an extended involvement with similar plans in the coal industry. Murray, who was soon to head the CIO, was especially impressed by Morris Cooke, and in 1940 they co-authored *Organized Labor and Production*, in which unions were urged to struggle for a greater part in the management both of industry and of the national economy. Their message has been well summarized by Jacoby: “Cooke and Murray advocated ‘tapping labor’s brains,’ by which they meant making organized labor an active participant in determining production procedures and administrative policies designed to increase the output and distribution of goods and services” (Jacoby, 1985, p. 103).

The Murray-Cooke program subsequently was adopted by the CIO, and this despite the fact that it was made clear that what was being proposed was Taylorism. That this was the case was highlighted in their book, where it is asserted that the “union-management cooperative movement” was a logical extension of Taylor’s desire for friendly relations between managers and workers (Cooke and Murray, 1940, p. 137). This observation was supplemented in a dialogue between the authors that constitutes their conclusion. Murray conceded that scientific management, as practiced by Cooke and his colleagues, had great appeal but lamented that “under the guise of ‘scientific management’ a good many practices have been put into effect which were less scientific than extortionate” (Cooke and Murray, 1940, p. 261). How, he asked, were workers to distinguish scientific managers from “efficiency engineers” who were mere agents of the employer? Repeating the message he had voiced for a quarter century, Cooke replied:

The obvious, simple, direct, step is for organized labor, progressive employers, and professionally minded engineers to get together to put management engineering by whatever name you call it on the dissecting table, and as a result of such laboratory work put on record so that everybody can understand, the anatomy, physiology and pathology of management engineering. You should have in mind that there is already a rich literature of Scientific Management easily available. A reading of the Bulletin of the Taylor Society affords quite an education as to the best in management [Cooke in Cooke and Murray, 1940, p. 263].

The ability to distinguish between Taylorists and corrupt “efficiency engineers” was not unique to the leadership of the CIO. In his 1939 volume *Labor and Democracy*, William Green denounced “so-called scientific management experts” who imposed “speed-up methods” that “placed an intolerable work load on employees, destroyed craft skills, and gave no just reward for increased productivity.” However, he added:

Scientific management techniques . . . when they give full consideration to the human element and are installed under joint supervision of management and organized workers, may be of much benefit in eliminating waste, improving work conditions and increasing efficiency. Labor has a very definite stake in efficient management, for unless the production process is conducted as economically as is possible without working injustice on any employee, and unless costs decrease and efficiency improves, we cannot hope to produce the income which will give us higher living standards [Green, 1939, p. 113].

Finally Golden, who published eight papers in SAM’s journal in the 1940s, reports that he collaborated with the Taylorists because unlike most management theorists, “Taylor and his disciples were . . . critics in a real sense.” That is, they were critics willing to advance views highly unpopular with employers. Moreover, they did so even though this meant that the “Taylor Society and its leaders stood in brazen opposition to the dominant currents of industrial thought” (Golden, in Nadworny, 1955, 146).

By 1940 the revived mutual-gains campaign was very much underway. The topic “joint management-union production studies” had been a major theme of SAM’s 1938 conference. Ordway Tead gave a keynote address in which he reviewed the history of Taylorist support for the mutual-gains model and asserted that the emerging revival of collective bargaining made possible by the Wagner Act was setting the stage for the development of real cooperation, greater productivity, and enhanced industrial harmony (Tead, 1939, p. 72). That Tead’s enthusiasm was shared by SAM’s membership is indicated by the fact that first-generation Taylorists retained control of the organization’s journal through to 1949. However, it is also clear the society remained characterized by diversity and that at least part of the membership had a sympathy for the Wisconsin school’s more limited conception of collective bargaining and industrial

democracy. The stark contrast between the two views was made manifest at SAM's 1940 conference, at which Clint Golden detailed the old guard Taylorists' understanding of what the mutual-gains model demanded of capital, whereas Clayton Hill outlined the more limited form of collective bargaining that he thought management might be brought to concede. In his list, Golden demanded that management discard its pretension of infallibility, allow labor to participate as an equal partner in the productive processes, stop blaming its failures on labor, government, or anybody else, and accept bona fide labor unions and genuine collective-bargaining procedures completely and in good faith (Golden, 1941, p. 7).

In reply, Hill outlined the perspective of the "advanced managers" to which he belonged, by which he meant those managers willing to bargain with independent unions. Such individuals believe that workers have the right to choose their representatives, be informed on important management actions that affect them, be paid wages as high as the market permits, and bargain collectively. However, they insist that bargaining must be confined to employment conditions and be conducted in a "reasonable" manner. Hill noted that many employers were resistant to even this limited form of union-management cooperation. Nevertheless, he also was aware that in his home town of Detroit the program he described was being perceived by key industry leaders as an acceptable compromise given the rise of mass unionism. Indeed, not long after Hill gave his address, General Motors institutionalized the form of bargaining he advocated, with a SAM member playing a key role in its consolidation.

In 1940, George Taylor was appointed umpire of the newly signed UAW-GM contract. At the time, this development must have appeared a great opportunity to extend the mutual-gains model. Optimism that the model would be extended was common not only within SAM, the AFL, and the CIO but also in wider industrial relations circles. For example, Sumner Slichter in 1941 devoted some two hundred pages of *Union Policies and Industrial Management* to an examination of the history of union-management cooperative schemes for increasing production, quality improvement, and cost reduction. Slichter was aware that such schemes tended to have a high mortality rate and had been embraced by only a small number of employers. He argued nevertheless that one "... may predict with considerable confidence ... that the policy will be pursued more extensively in the future than in the past" because the "economic case for the policy is very strong" (Slichter, 1941, p. 564).

The hope that unionization of the automobile industry would assist the growth of the mutual gains model was, of course, not realized. As in the 1920s, it tended to be small, unionized enterprises experiencing difficult

times that took up the mutual-gains option. As Lichtenstein (1993, p. 123) notes, while GM took much from the bargaining model that George Taylor had helped develop in the garment industry, the company was very selective as to the parts of the garment program it adopted. As a consequence, the company institutionalized a form of union-management cooperation closer to the model advocated by the Wisconsin school than that favored by SAM, and it was this model that was subsequently widely emulated through industry. Lichtenstein (1993, p. 131) has explained why this was so:

General Motors had a very different conception of how the grievance system and umpire machinery might function. The company, which had closely observed the way in which Taylor handled disputes in the hosiery industry, wanted to avoid the freewheeling, all-inclusive style pioneered there. The largest corporation in the world had no need for the kind of economic tutelage so often meted out by those industrial relations "fixers" who had pioneered in the economically chaotic clothing trade.

In short, GM rejected "joint management" and instead institutionalized that amalgam of work practices, formalized grievance procedures, limited seniority, and constrained bargaining that subsequently became known as "New Deal Industrial Relations."

While the GM-Wisconsin model may not have been that which George Taylor and the UAW would have chosen, both came in time to see it as the best that could be achieved. This process of acceptance was assisted by the War Labor Board, which through World War II defined the scope of collective bargaining in terms that sustained managerial prerogative. The board insisted that unions must not interfere in the "rights of management in the matter of hiring, transfer, or promotion of any employees and in the general management of the plant" (Atleson, 1993, p. 166). Through the war period the need to placate labor ensured that the vehemence with which employers and the board insisted on this policy was somewhat muted. Indeed, the war saw the creation of thousands of "joint management-labor committees" whose function was to maximize the production of the needs of war. The CIO and SAM hoped that these bodies would prove a first step toward the implementation of the Murray-Cooke program, even though they were primarily confined to small enterprises (Harris, 1982; Jacoby, 1985). However, employers remained determined that the war production committees would not create inroads into management's freedom to manage. As Jacoby (1985, p. 119) has observed, "powerful firms were not about to risk a loss of that freedom for the sake of an uncertain increase in wartime morale and productivity." Moreover, as peace approached, employers became increasingly strident in insisting

that unions acknowledge that control of production and investment was the employers' prerogative.

The latter was not a demand employers won with ease. At President Truman's 1945 National Labor Management Conference, the AFL and the CIO conceded that effective management was vital to efficiency, progress, and job creation but also insisted that union participation in the management process was a dynamic subject and that the erection of rigid boundaries would restrict flexibility and promote conflict (Derber, 1970, pp. 398–399). Within the workplace, the right to participate in the management process, along the lines advocated by Murray and Cooke, became a key issue in the postwar strike wave, and through to 1951 the CIO repeatedly called for an expansion of labor-management committees, industry councils, and tripartite national planning. The promotion of these demands was led by those CIO leaders closely associated with the Taylorists, such as Clint Golden, Solomon Barkin, and Philip Murray (Harris, 1982), and was supported by what Derber (1970, p. 379) has described as “a sophisticated journal of industrial engineers and personnel leaders.” The body that produced this journal was of course SAM, which through to the end of the 1940s campaigned for the mutual-gains policy despite the fact that the organization as a consequence became increasingly estranged from other management bodies.

The 1940s campaign to save the mutual gains program has been documented by Harris (1982) and Jacoby (1985), though in so doing they neglect to highlight the role played by the Taylorists. What they do report is that it was a campaign that from 1947 was opposed not only by employers but also by the state, which, with the oncoming Cold War, became increasingly sympathetic to claims that the mutual-gains demand was part of a strategy of “creeping socialism.” Confronted by this alliance of capital and state, the union campaign withered, and by 1949 the mutual-gains model was a rarity and the GM-Wisconsin model of union-management cooperation was firmly institutionalized.

Thus a collective-bargaining model that conceded to employers the sole right to decide production and investment policy became the norm. Though subsequently undermined by the rise of unitarism, the model remained dominant both in practice and in the industrial relations literature until the 1970s, when the decline of U.S. global competitiveness made a reappraisal of accepted practices and ideas a critical necessity. However, by this time the experimentation of the interwar years and the Taylorists' role in these experiments were long forgotten. Hence, when influential analysts such as Braverman equated the GM-Wisconsin model

of labor relations and production with Taylorism, there were very few who knew otherwise.

Conclusion

This article has demonstrated that through the period 1910–1950 the Taylor Society advanced policies that closely mirrored those promoted by modern mutual-gains analysts. In so doing it has refuted the claim that to successfully develop the mutual-gains strategy it is necessary to reject Taylorism. The article also has refuted the assertion that scientific management can be equated with the exclusion of workers from decision making in the workplace. It is true that Taylor only gave close attention to mollifying organized labor when the trade union and Progressive movements forced on him their deep concern that his methods would leave workers without a voice. Nevertheless, the fact remains that when he and his disciples did respond to this charge, it was in a manner that was uncompromisingly democratic. Where the overwhelming majority of employers and rationalizers sought to use systemization as a device for marginalizing unions and rendering workers mute, Taylor proposed the joint appointment of technicians and the establishment of an independent government tribunal to which workers could appeal to resolve their grievances. These are rather more democratic solutions than many of the instruments promoted by modern mutual-gains theorists.

A third point highlighted by this article is the fact that the sharp divide traditionally drawn between Taylor and those of his disciples who subsequently developed the mutual-gains model has been inadequately substantiated in the literature. Given that this is the case, it should be concluded that Nadworny's claim that Taylor remained implacably anti-union was advanced with undue confidence, that Taylor's views on unions are open to multiple interpretations, and that his thought appears to have evolved in the direction of being more open to and supportive of organized labor.

This article also has highlighted the fact that the mutual-gains strategy has a long and rich history in the United States. This is a history that is known to few industrial relations scholars and thus is very much underexplored. Correcting this situation is important, for over the last two decades employee participation in workplace decision making has become common in U.S. industry (Kochan and Osterman, 1994; Ichniowski, et al., 1996, p. 300). Much of this activity has been in nonunionized enterprises, but unions are nevertheless more open to the mutual-gains strategy than at any time since the 1940s. This is an important development not least

because there is much evidence that productivity-centered forms of worker-manager cooperation achieve greatest success in unionized firms (Adler, 1993; Bluestone and Bluestone, 1993). However, there is great uncertainty as to the long-term viability of these efforts.

Writing in 1983, Jacoby observed correctly that despite the fact that there are striking similarities between the interwar and more recent experiments with the mutual-gains strategy, it is risky to draw lessons from the earlier experience. Nevertheless, he advanced some useful insights that bear reconsideration by those now grappling with these concerns. His first conclusion was that interest in this strategy tends to be stimulated when unionized firms face an increased in nonunionized competition or when they experience a prolonged decline in their profitability. This hypothesis has been confirmed by this article, which has shown that it was primarily enterprises in difficult economic straits and unions in danger of losing their membership that experimented with the mutual-gains strategy both in the 1920s and in the late depression years. However, while Jacoby's observation has validity, it is important that it not be over-generalized, for it can give the impression that the mutual-gains strategy is a refuge into which unions flee only when their "natural" inclination to embrace adversarialism is thwarted by a hostile economic environment.

If one concludes that this is the case, it makes sense for employers to undermine the viability of unions when and if they get the chance. What this study has shown, by contrast, is that the interwar union involvement with mutual gains originated not in the 1920s when labor was under attack and union membership was in serious decline. Rather its genesis is located in World War I and the immediate postwar years, when labor was at its peak in terms of membership and militancy and was deeply inspired by the possibilities perceived as inherent in the notion of industrial democracy. This fact suggests that the mutual-gains strategy is not simply an aberrant product of union weakness and employer desperation. Rather, it is a strategy that can be an outcome of either increased insecurity or a desire for an enriched industrial democracy and may well be sustained in periods of economic prosperity.

A second conclusion advanced by Jacoby is that there is only an "intermediate range" in which economic stress tends to induce unions and employers to explore the mutual-gains option. The notion of intermediacy suggests the existence of a floor below which the mutual-gains model will cease to function effectively. In support of this notion, Jacoby notes that a dramatic decline in the economic fortune of nations often has driven employers and unions from this intermediate range with the consequent collapse of productivity-centered collaboration. Again, this study

supports his observation, it having been shown that the onset of the depression ended most of the 1920s mutual-gains experiments. This is a fact that has important implications for present attempts to revive the strategy and may well explain why many of the reportedly successful initiatives of the 1980s were abandoned when market conditions and international competition generated a serious threat to the profitability of many firms in the early 1990s.

However, what the study also has revealed is the significance of a factor only implicit in Jacoby's use of the term *intermediate range*. This is the fact that the term implies a ceiling as well as a floor and suggests that if firms are freed of serious market, union, and/or political challenge, many will abandon the mutual-gains strategy as quickly as others are prone to do in difficult times. Thus in the late 1940s, a period when U.S. industry was virtually unchallenged in the global economy, we witness an intense and vehement employer campaign in support of the "right to manage." Similarly, while the drop in competitiveness and profitability led many employers to take up the mutual-gains option in the 1970s and 1980s, the fact that many of these same firms regained international market share in the 1990s appears to have been a significant factor undermining their enthusiasm for the strategy (Kochan and Osterman, 1994). Given the evidence of Ichniowski and coworkers (1996) that U.S. employer support for employee participation in decision making, while widespread, has little depth, this response is not surprising. It is a reminder, moreover, of Cooke's observation of the need for strong independent unions who are able and willing to exert the influence on managers that is required to deter them from embracing the path of adversarialism.

The last of Jacoby's conclusions that warrants comment is his claim that the development of the mutual-gains model was greatly facilitated by the involvement of outside experts. The intermediate social position of these intellectuals enhanced their capacity to reassure workers and managers that experimenting with the strategy would be to their mutual advantage. This article has provided new support for the hypothesis that intellectuals can contribute much to the development of the mutual-gains model. Certainly the fact that both labor and business enjoyed the assistance of Taylor Society intellectuals was a critical factor in facilitating their capacity to further the development of the strategy. Likewise, the abandonment of the strategy by intellectuals in the late 1940s helped ensure that the mutual-gains message promoted by Taylor, Cooke, Tead, and others remained undeveloped for many decades. A call for contemporary theorists to play a more positive role in the promotion of the mutual-gains enterprise has been made by Kochan and Osterman, who observe

that to do so scholars will need to "broaden their analytical lens." They insist that an important element required to achieve this broadening is the abandonment of any conceptual commitment to Taylorism. What this article has shown, on the contrary, is that this analytical task needs to incorporate a broader understanding of the history of Taylor and his disciples.

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