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*The State of Sociological Practice*

## **FORDIST APPLIED RESEARCH IN THE ERA OF THE FIVE-DOLLAR DAY**

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### **ABSTRACT**

*This article provides a description of the early attempts at applied social research and research driven policies and procedures used in the assessment of the employees and the consequent rewards and punishments meted out by the Ford Motor Company during the late Progressive Era. An additional aim of this paper is to show the relevance and significance of these attempts and to examine the extent to which early Ford research can inform our applied research today. In particular, this study examines the early data collection efforts by investigators of the Ford Motor Company Sociological Department. These took place in the early part of 1914 and aimed at gathering information concerning workers' habits, family situations, financial states, home conditions, and social and economic behavior. These investigations were thorough and exhaustive. The outcome of Ford's research resulted in the classification of all company workers into four main categories used to decide who would or would not qualify for the Ford profit sharing plan. An equally important part of the mission of Ford's investigators was to guide the workers to modify their behavior to secure the profit sharing portion of the salary. This was an example of the paternal capitalistic ideology that characterized Ford Motor Company labor relations during this period. We conclude that the company emerges as one of the pioneers in the collection and utilization of applied research data, for the benefit of the company and betterment of the workers.*

This article provides a description of the early attempts at applied social research by the Ford Motor Company, beginning in 1914. An additional aim of

this paper is to show the relevance and significance of these attempts and to examine the extent to which early Ford Motor Company research informs our applied research activities today. In particular, it examines the research data generated by Ford's management policies and their application. The data collection efforts by investigators of the Ford Motor Company Sociological Department produced information on employee's personal habits, family situations, finances, and economic behavior. The company utilized this information to create a set of criteria to reward or penalize workers.<sup>1</sup>

In January 1914, Henry Ford stunned the world by announcing the now famous "five-dollar-day" plan, which effectively doubled the minimum wages paid to industrial autoworkers. Until then, the average daily wage for an unskilled worker in the automobile industry of Detroit was \$2.40 (May, 1990). The minimum wage at the Ford Motor Company stood at around \$2.70 ("Compiling of Rates," S.S. Marquis Papers, Acc. 293). Ford's announcement of the five-dollar-day angered most industrialists, who saw it as a great threat (see for example, Fitch, 1914; Abell, 1915; Marquis, 1916). It also excited workers and created a mass influx of migrants to Detroit looking for jobs at Ford. According to the five-dollar-day (or "profit sharing") plan, workers' salaries were split into two parts: the basic wage and the profit sharing portion.<sup>2</sup> The basic wage remained about the same as it was before, approximately \$2.70 per hour. The other part was designed in such a way as to maintain a minimum of \$5.00 a day for the workers.<sup>3</sup> Under the plan, workers still earned a minimum of about \$2.70 a day as base salary. If they complied with the conditions of the plan that revolved around work and family values and if they demonstrated thrifty habits, they would also qualify for an additional \$2.30 in profit sharing. Interestingly, the conditions of the plan to which the workers had to conform had more to do with personal and social characteristics than to work performance.<sup>4</sup>

Initially, participation in the profit sharing plan was limited to (1) male employees 22 and over who had "good habits" (thrift, temperance, etc.) and who took good care of their families if married and (2) men under 22, as well as women of any age, if they were the sole supporters of dependants. Initially, the plan excluded married men who were either not living with or who did not take care of their families; single men under 22 with no dependents; and women with no dependents. In time, the plan was extended to include more workers. For example, by October 1916, women (of "good habits") over the age of 22 were allowed to share in profits. Also, "in the course of time even single men of eighteen years 'known to be living wholesomely and constructively' were numbered with the other qualified groups" (Levin, 1927: 79).

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### **ESTABLISHMENT OF THE SOCIOLOGICAL DEPARTMENT**

The Ford Sociological Department was established in 1913 to promote worker welfare. It was headed by John R. Lee, arguably one of the first modern personnel managers (Nevins, 1957). Lee was recruited from Keim Mills, a Buffalo based factory, purchased in 1911 by the Ford Motor Company to manufacture automobile parts (Nevins, 1957; Lacey, 1986). A year later, in January 1914, immediately following the announcement of the five-dollar-day plan, the Sociological Department greatly increased in size and scope of its responsibility. The new Departmental responsibilities included the collection of data necessary to meet the stipulations of the profit sharing plan and its proper enforcement (Nevins, 1957).<sup>5</sup> The Sociological Department employed varying numbers of investigators (later renamed "advisors"), from an initial number of 100, to a high of 200, and then to a low of 52 (Nevins, 1957; Meyer, 1981). All the investigators were recruited from within the company itself, a practice of which Lee was very proud (Lee, 1916).<sup>6</sup>

Lee reorganized the Sociological Department in order to assess how Ford employees fared in light of the profit sharing scheme. He also sought to guide their improvement by hiring a group of employees from within the company, chosen for their "peculiar fitness for the work" (Lee, 1916: 303). Their assessment of workers included: personal habits, the fitness of their families,' housing, and neighborhood surroundings. Several thorough and exhaustive investigations were undertaken to explore these issues. The guidance offered to employees by the Sociological Department took many forms. They would, for example, advise workers on the company's conception of thrift and legal matters. These included many social and economic practices, such as treatment of one's family, consumption patterns, the purchase of real estate, and related issues. Furthermore, sociological investigators would intervene, whenever deemed necessary, and "encourage" workers to alter their behavior. For example, on one occasion, upon establishing that a worker neglected to take good care of his family, investigators withheld his profit sharing and gave it directly to his wife to meet family expenses.<sup>7</sup>

In 1914, John A. Fitch wrote an article in a social scientific journal, *The Survey*, entitled "Ford of Detroit and His Ten Million Dollar Profit Sharing Plan." In the article, he gave an insight into the everyday process of the Department's investigations.<sup>8</sup> Fitch captured the excitement at Ford: "Fifty investigators are dashing about Detroit in Ford automobiles, accompanied by interpreters and armed with long lists of employes [sic]" (Fitch, 1914: 547).

### **Research Data Collection and Triangulation**

The investigators used three types of data collection: (1) informal, semi-structured interviews with workers and others, (2) personal observation during the interview process, and (3) verification of information through official documents. The investigations of the Department involved, in particular, visits to workers' homes and interviews with workers and members of their families. But they also conducted interviews with friends and neighbors, in attempts to cross-reference the information gathered. Fitch (1914: 547; also Meyer, 1981: 124) described the scene of a typical investigation:

Interviewer: "Does Joe Polianski live here?"

Respondent: "Yes, he lives here all right."

I: "What sort of man is Joe - pretty good fellow?"

R: "*Sure* he is a *fine* man."

I: "What does he do evenings?"

R: "Always home evenings, goes to bed early."

I: "Does he drink?"

R: "No! No! He does not drink."

I: "What does he do with his money - does he save any?"

The investigators also required that the workers provide documentary proof of their financial status. Thus, for example, "thriftiness" was established through several sources that included interviews described above, observations about home conditions and furniture, and examination of personal documents such as bank account statements, rent payment receipts, and marital and baptismal certificates. Therefore, it can be said that even before the term "triangulation" was introduced in the research literature, Ford investigators used triangulation techniques in their data collection procedures to validate the quality of the collected data.

The frequency and rigor of worker investigations varied considerably. They differed greatly between individuals, depending on how they fared in prior investigations and also from one period to another. By 1916, when Samuel Marquis took over the Sociological Department, a worker would be investigated within thirty days following his hiring. In his address to the American Bankers Association (Acc. No. 63, box 1: 44), Marquis reports that a typical visit consisted of the following. "One of the investigators going to his home, taking note of the conditions of the home, housing conditions, sanitary conditions, evidences of thrift or of the lack of thrift, right conditions in the family and all that sort of thing." Typically, investigations tended to become less frequent as time went by. After reorganization in 1917, investigations took place only once

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after a worker was hired, and thereafter only upon request from either the worker or a company official.

### **Phases of Research Data Collection**

In 1914, The Ford Motor Company was engaged in at least two major phases of data collection. The initial work of investigators of the Sociological Department was aimed at gathering information concerning workers' habits, family situations, financial state, and socio-economic behavior. This was done (1) to assess whether or not a worker was qualified to participate in profit sharing and (2) to aid workers to succeed in qualifying for profit sharing if they were not initially successful. This phase was conducted between January and April 1914. Unfortunately, no detailed records of the research conducted during this period are available either in the company archives or any of the other sources.

The second phase was initiated immediately following the first, in the spring of 1914. It lasted through the summer. There are more adequate records for this phase of data collection. Lee recorded his advice to the investigators in four documents intended to improve the quality of the data.<sup>9</sup> In these documents, Lee provided detailed instructions, mainly regarding methodology. They also contain important hints concerning the logistics of the research, workers' reactions to the first phase of the investigation, and how these issues informed the second phase. In retrospect, these documents provide an important insight into the development and application of the social research carried out by the Ford Motor Company.

The officially stated aim of the investigation was to establish workers' housing conditions. On April 15, 1914, Lee offered his investigators the following account. "Mr. Ford told me he wanted it known that his plan is for every family working for him a comfortable home, a bath tub in it, and a yard with a little garden, and ultimately, he wanted to see every employee of his owning an automobile" (Lee's First Talk: 1; see note 8 for the complete reference). Investigators used the assessment of workers' family situations to evaluate workers' habits.

Another goal of the company research efforts was to help those who did not qualify initially for profit sharing to change their habits so that they would eventually qualify. The company set up a system whereby profit sharing was withheld from a worker if he did not qualify, although a varying proportion of it could potentially be returned to him depending on his progress.<sup>10</sup> In an address to the American Bankers Association (The Ford Profit Sharing Plan, Acc. No. 63, box 1: 47), Marquis explained:

If a man is not going right we take him off profits for thirty days. If he gets straightened out at the end of thirty days, we keep [sic] back all his profits for that month. If it takes him sixty days, he only gets seventy-five percent... If it takes him ninety days he gets sixty percent... If it takes five months, he gets only twenty-five percent of his profits... and then at the end of six months if he does not make good, he is directed to go somewhere else.<sup>11</sup>

The Ford Motor Company collected research data about workers to enable the company to make decisions regarding the distribution of profit sharing and take the necessary steps for the improvement of its workforce.

The manner in which the first phase of the investigation was conducted was aggressive. Many workers experienced it as intrusive, which created some worker antipathy toward the company. In addition, investigators ran across some linguistic difficulties, as the majority of the workers at that time did not speak English. Although the company did provide investigators with interpreters during the first phase, these were too few and not of the highest competence. Often, family members, friends, or neighbors of workers under investigation would act as interpreters. This further hindered the flow of information from workers to investigators, and vice versa.

An examination of Lee's advice to his investigators in the beginning of the second phase of the investigation makes it evident that the problems encountered during the first phase served as lessons for the Sociological Department. The lessons served to improve the research design and data collection of the second phase. In particular, the company utilized the collected data to improve the quality of their research and to refine the company's ideology regarding the transformation of labor relations.

Lee separated his investigators into three groups during the second phase. The first group was assigned to investigate the employees who had initially been approved by the company for profit sharing. One of the aims of this group was to make sure that such employees "dropped back into their old traits" (Lee's First Talk: 1). In his advice to the first group of investigators, Lee made it clear that agitators were to be weeded out. These "petty emperors" (Lee's First Talk: 4) were not to be allowed to share in company profits. Indeed, loyalty and obedience were strictly expected from workers.

The second group of investigators consisted of five members. It was in charge of "the class of doubtfuls." These were employees who had qualified for profit sharing following the first investigation but about whom management remained "doubtful of their being able to continue on the profit sharing basis"

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(Lee's Second Talk: 1). Lee noted that this group consisted of more single than married workers. He expected the majority to consist of "American or English-speaking men" rather than "foreign speaking fellows" (Lee's Second Talk: 2).

The third group of investigators sought to "look after and to boost the men who have not qualified on the first investigation, and to bring them around so that they will receive a share, and to bring them up so they will continue to receive it" (Lee's Third Talk: 1). This was to be done with care to avoid the antipathy generated by the first phase: "We have in our first work engendered a lot of antipathy and ill-feeling on the part of outsiders towards the Ford Motor Company, and you are going to run into a lot of people, who probably have relatives here who are not receiving the money, and they are sore, and they blame the Company for it" (Lee's Third Talk: 1). Note that the vast majority of workers included in this group consisted of "foreigners" (Lee's Third Talk: 4).

Lee cautioned his investigators that "it is going to take a great deal more tact, originality, and a lot of stick-to-itiveness to get what we want this time than it did the first time" (Lee's First Talk: 1). This was meant to prevent the company from risking "antipathy" by the workers. He urged his investigators "not [to] go into anybody's house in a way that you would not want them to come into yours" (Lee's First Talk: 5). In particular, Lee (Second Talk: 2-3) cautioned:

Now, in a general way, we are going to be up against a number of things this time that we did not have to contend with the last time. The last time the scheme was brand new, and the people were anxious to find out what they had to do, or what we wanted them to do, but now it will be entirely different. We have got to use all the diplomacy, ingenuity, courtesy and gentlemanly qualities we can muster, in order to accomplish the right results.

In the second phase of data collection, investigators were equipped with "yellow sheets" containing the results of the first investigation. "We are going to let you take the yellow sheets, just as a guide to go by, but please do not let the man you are investigating see them. Of course, if you read off the yellow sheet, thus, 'you have \$100 in the bank,' he will answer, 'Yes,' and all along down the sheet" (Lee's Second Talk: 6). Although what Lee called a "yellow sheet" was not available in the company archives, it is very likely that the contents corresponded to the "Record of Investigation" form, included in the Appendix, below. In order to "safeguard" his investigators, and also to make them look more important in the eyes of workers, Lee issued picture identification cards ("passes") to all his investigators. These were issued to protect the workers from people posing as agents of the company (Lee's First Talk, p. 4).



Whereas the first phase of data collection was oriented toward the assessment of workers, the emphasis during the second phase was to help them qualify for profit sharing. In his advice to the second group of investigators, Lee (Second Talk: 3) urged them to “go out with the idea that we are not trying to find all the flaws of the man, but to find his good points... So far, we have been out on a muck-raking campaign, to see if we could pull him down.” In his advice to the third group of investigators, Lee (Third Talk: 3) reiterated this point. “We went out the first time on the basis of finding out all the faults and bad things about the men, but this time we are not out to get these faults, but to find the good things in the men...” Lee noted that the first attempt had been aggressive and he wanted the second phase to be more diplomatic and facilitating.

Lee was very conscious of reliability issues in social research. For example, he was aware of external influences on workers during the interview process and he emphasized the importance of one-on-one interview techniques. He warned his investigators that they "can get more information from a man alone than you can when his neighbors or friends are around" (Lee's First Talk: 4). Lee was also aware of reliability issues relating to variations over periods of time, as well as variations that are cyclical in nature. For example, in his "Talk to the First Group of Investigators," Lee warned that judgment over the home conditions should be made carefully. "One may have struck it on Monday morning after Sunday's revelry, and before the house could be cleaned up, another on Tuesday morning, when everything was cleaned up nicely, and another on Saturday, when it had not been cleaned for a week" (Lee's First Talk: 2). Lee made similar comments to the other two groups of investigators.

During the second phase investigators were not only responsible for collecting data but also for disseminating information about the five-dollar-day plan. Lee advised his investigators to "impress upon the people that this Ford Profit Sharing Plan is permanent" (Lee's First Talk: 3). He also advised them to distribute especially made notices (in fourteen languages) with information relating to all the things "the Ford Motor Company is doing, and can do for him" (Lee's First Talk: 3). Lee was interested in giving due publicity to the five-dollar-day plan and to the workings of the Sociological Department. "Do not hesitate to answer all questions regarding the plan, whether asked by the employees themselves, or parties entirely outside of our organization. We are glad to have it known at large" (Lee's Second Talk: 6).

Although the company promoted the dissemination of certain kinds of data on housing and other matters, some information was to be safeguarded from the media. In particular, Lee wanted to keep information relating to ethnic

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composition of the workforce at Ford confidential. This was largely because there were more non-English speaking immigrants than English speakers working in the company. In fact, as much as 70 percent of Ford workers in Detroit were foreign-born (Meyer, 1981; Rupert, 1995). In his First Talk (3-4) referred to this explicitly.

Out of the 8,000 men working here, there are 73 that did not know what they were 1,829 Americans, 1,812 Poles, 1,465 Russians, 522 Rumanians, 366 Germans, and 137 Servians. So you can see that the foreign element predominates. This information, the newspapers are crazy to get, and it has taken all the ingenuity I can get, outside of lying, to keep it from them.<sup>12</sup>

Because most immigrant workers at the time did not speak English, interpreters were assigned to each investigator. Lee was conscious of the importance of good interpretation. He promised his investigators better interpreters so as to avoid the kinds of misunderstandings that were generated during the first phase (Lee's Second Talk: 6).

We found that our interpreters, lots of times, on the first investigation were not on the level, or were not qualified to interpret, but Mr. Henkel is going to be careful this time to select men we can depend upon – men who are a little older, and who have a knowledge of interpreting a little better. I believe a great many of the men were deprived of their share of the profits by mistakes in the interpretation. We want to be more careful this time and see that we go out pretty well equipped.

Near the end of the second phase of investigation, on July 7, 1914, Lee cautioned his investigators about the dangers of "delving into strictly personal things" (Lee's Talk, July 7: 1). The workers had complained about the nature and repetitiveness of the questions being asked by investigators. In response, he noted that the need for asking demographic type of questions had receded since the information was already in the hands of the company. Instead of asking many questions, Lee prompted his men: "I WANT YOU TO DO MORE SELF-OBSERVATION. You all ought to be keen judges of human nature, and you ought to be able to tell from outward appearances whether people are getting ahead, or standing still, or going back" (Lee's Talk on July 7: 2). Indeed, by the 1920s house visits by investigators had largely been a thing of the past. Instead, "spotters" carried some of the functions of the sociological investigators who covertly observed workers to assess their personal and public demeanor and habits rather than interviewing them.

### Utilization of Data

The Sociological Department was established to meet the specific and immediate needs of the Ford Motor Company. But its importance extended far beyond the immediate environment of the Company. The Department codified and applied a set of values and behavioral guidelines (benchmarks) that created a dichotomy between what we now call the “deserving” and “undeserving” poor. This cognitive distinction between “good and bad” workers was developed during Ford’s day. It was intended to establish a way to distinguish between workers who were eligible for the profit sharing portion of their salary and those who were partially or entirely not eligible at all.

Those deemed ineligible for profit sharing were categorized as “unworthy” and fired from the company. The Sociological Department's investigators had reported them as unthrifty, intemperate, and non-compliant. Workers were expected to prove their thrifty habits by buying a car, and “decent” housing.<sup>13</sup> That is, thrift meant abstaining from alcohol, saving money for a house and car, managing finances well enough to support a “middle class” living, and in general working hard for God, country, and family.<sup>14</sup>

The outcome of this research resulted in the classification of all workers into four main categories (Lee, 1916: 303): Employees who were “firmly established in the ways of thrift and who would carry out the spirit of the plan.”

1. Employees who “had never had a chance, but were willing to grasp the opportunity.”
2. Employees who qualified for profit sharing, but about whom investigators had doubts as to the strength of their character.
3. Employees who did not or could not qualify.

Employees classified in the first group were enlisted in the profit sharing plan and were rarely bothered by investigators. This group included almost all of Ford’s “white American” workers. Investigators directed further inquiries to the last three groups, mainly consisting of newly arrived, non-English speaking, Southern and Eastern European immigrants living in Detroit’s ethnic neighborhoods. Employees of the second group could expect visits as often as considered to be necessary “in the judgment of the investigation department” (Lee, 1916: 303). The goal of this policy was to ensure that the behavior of these workers conformed to the behavioral guidelines of the Sociological Department. Employees in the third group were treated similarly, although “some detailed plans had to be laid for them” (Lee, 1916: 303). Employees in the fourth group were considered problematic and were given assistance to

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overcome their "inadequacies." If they did not modify their behavior appropriately, they were considered undeserving and were ultimately fired.<sup>15</sup>

Following the first phase of investigations, during the first quarter of 1914, 60 percent of the workers qualified for profit sharing (Lee's Second Talk: 5). By mid-1914, at the end of the second phase of investigations, about 69 percent of the workforce qualified for profit sharing. Eight-seven percent qualified by the end of the year. By 1916, about 90 percent of the workers qualified for profit sharing (Lee, 1916).<sup>16</sup>

Henry Ford himself presented his profit sharing plan as the "ultimate solution" to the labor problem. He arrived at this conclusion in January 1914, just a few weeks after the introduction of the five-dollar-day. On two occasions he referred to the "striking results" of the plan: increased efficiency and the development of personal character (Fitch, 1914: 550). As an illustration, Ford cited an increase in the productivity of the motor assembly department, where production rose from 85 units per hour before the introduction of the plan to 105 units after the plan was introduced. Concerning the development of personal character, Ford cited a "remarkable epidemic of house cleaning" among workers, as observed by the sociological investigators. Ford considered this to be an indication of the beneficial effects of the profit sharing plan. "When a man gets a higher wage he will not only be a better workman, but he will be a better man and will carry the influence home to his family" (in Fitch, 1914: 550).

Lee was aware of the undercurrents of conflict and exploitation in urban ethnic enclaves. He tried to disengage the workers from ethnic ghettos, thus decreasing any competing influences on his workers such as ethnic *padrones*.<sup>17</sup> Through its training programs, the Sociological Department sought to end the "bondage" of immigrant workers. The emphasis on immigrant assimilation through education was important in two ways. First, Ford training programs aimed at transforming foreigners into "good American citizens." Second, they aimed at producing good workers, who were trained not only in the English language but also in loyalty, compliance, and personal and work habits.

Detroit in the mid-1910s witnessed a massive Americanization campaign for its foreign workforce. In line with the Detroit campaign, the Americanization efforts at Ford extended to the instruction of English via the Ford English School. Hill (1919: 633) called the school, "one of the most extensive and best organized efforts yet made by an industry for the Americanization of its foreign-born labor." Most employers encouraged attendance at evening schools set up to accommodate immigrants who wanted to learn English. However, they did not require it, nor did they organize

company-owned schools for their own workforce. In contrast, this is exactly what the Ford Motor Company did.

Under the auspices of the Sociological Department, YMCA associate Dr. Peter Roberts, an Episcopalian minister, created The Ford School for the English Language (Lee, 1916; Hooker, 1997). Lee was “the leading authority” on teaching English to immigrants (Mason, 1916: 200).<sup>18</sup> Roberts was William Graham Sumner's student. Has was clearly acquainted with the writings of Lester Ward, whom Roberts (1904, 1970; 1912, 1970) cited in his works.

The Ford Americanization program served as a model for Detroit's campaign, as well as for the immigrant assimilation campaign undertaken by the National Americanization Day Committee (Hooker, 1997). In his advice to all three groups of investigators, Lee emphasized the importance of a departmental project about to be initiated. This was the now famous Ford English School, aimed at: “trying to emancipate these foreigners you run up against” (Lee's Second Talk: 3-4). The school, which opened in My, adopted the “Roberts system” of instruction 1914 (Levin, 1927; Nevins, 1957). The initial class was to be comprised of “about 200 foreigners” (Lee's Third Talk: 2).<sup>19</sup> The company planned for one class that would meet four days per week between 4:30 and 6:00 PM (after the end of the first daily shift). Classes were to be taught by Ford employees. Eventually the program expanded to three daily sessions, one each at the end the three work shifts.

The Ford English School curriculum has both practical and applied components. The school gave foreigners instruction in reading, writing, and speaking simple English, the work arranged in 72 lessons completed in 36 weeks. The reading concerned itself with such matters as “care of body, bathing, clean teeth, daily helps in and about the factory, including safety first and first aid, matters of civil government of state and nation, how to obtain citizenship papers, etc.” It offered a diploma to its graduates signed by officers of the company and the Educational Department, which was also accepted by the United States district officials at Detroit as entitling holders to first [naturalization] papers without further examination (Levin, 1927: 85).

The school closed in 1922, after fulfilling its purpose. World War I and restrictive legislation practically ended the immigration waves from Europe. By then, labor turnover had diminished; and the existing workforce was Americanized, at least to the point at which members could understand and speak English.

#### **APPLIED SOCIOLOGY AND FORD APPLIED RESEARCH**

During the early years of the development of their discipline, most American sociologists were interested in the utilization of social knowledge as a means for social improvement and reform. Neither Albion Small, nor Lester

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Ward, nor many of their colleagues were professionally trained in sociology (Lasslett, 1991; also see Bannister, 1987; Coser, 1978). Indeed, Ward, a Progressive Era reformer, was an “autodidactic” sociologist (Ross, 1991: 92), and a botanist and zoologist by training. Albion Small was a Baptist minister.

Lester Ward was the first president and the acknowledged founder of American sociology). He wrote his classic “Applied Sociology: A Treatise on the Conscious Improvement of Society by Society” in 1906. In that work he declared: “the purpose of applied sociology is to harmonize achievement with improvement” (Ward, 1906: 21). Ward equated *achievement* with *civilization* and used the term *improvement* to denote the state or “condition” of humanity in general. In short, achievement related to the state of technology, science, and knowledge in general, whereas improvement related to living conditions (including education) of the population at large. It is evident that Ward’s *pure sociology* was meant to be “ethically and politically neutral,” but *applied sociology* was “concerned with the means of changing society” (Bannister, 1987: 27).

By 1915, two traditions had developed in sociology and social research in the U.S. (Bulmer, 1998). One was a tradition of abstract sociological theory, distinct from empirical work. The other was “a tradition in empirical social inquiry toward fact gathering either in a spirit of disinterested inquiry or more commonly in the context of social reform...” (Bulmer, 1998: 79). Although hardly comprised of “disinterested inquiry,” the Ford research investigations clearly resemble the tradition of applied research, That is, used data for social reform and application toward the “betterment” of the company workforce.

In the 1920s American sociologists began to “observe strict neutrality in matters of ethics and public policy,” asserting that “sociology itself passes no moral judgment... and sets up no ethical standards for human conduct” (Bannister, 1987: 3). In the ensuing decades, this meant that “basic research and theory had to come first, they should take priority over activism” (Lipset, 1994: 205).

Judging by standards subsequently developed, and accepted today as the norm, the applied sociological research undertaken by the Ford Motor Company lacked a well-articulated theoretical basis. In effect, the Ford research program was more informed by instrumental and ideological interests than by theoretical premises or guidelines. The efforts of Henry Ford and his managers were guided by a paternalistic, capitalistic ideology and the by an interest in the application of the tools of research toward the improvement of the economic position of Ford. The research was, and was meant to be, beneficial to the interests of the company. After all, as Lee (1916: 310) stated, “The Ford Motor

Company have done [sic] all this work with their own men; there has been no theory used... we have employed no minds trained in philanthropy or sociology, or any other knowledge gained through books or university courses.”

The Company used applied research and implemented the information produced to achieve the personal and social transformation of its workforce. This provides an interesting case study of how the principles of human or societal engineering were employed by early twentieth-century industrial corporations. The research conducted by the Ford Motor Company was clearly intended to change one group in a society, namely the company employees. It was meant to make them better workers, better citizens, and better family providers. The beneficiary, however, was the Ford Motor Company.

The aim and object of Mr. Ford’s profit sharing plan is to uplift the community; make for better manhood and character of his employees; to raise their morals and better their surroundings and modes of living; foster habits of thrift; to make pensions and sick benefit unnecessary; to provide for the rainy day which everyone is liable to encounter and to generate and fix their minds such ideas of right living as go to make better American citizens. The plan as outlined by Mr. Ford is unique, in that it not only creates a desire for the better things, but it also gives a man the wherewith to get them (Acc. 293, S.S. Marquis Papers: 1).

For the Ford Motor Company, the creation of a “desire for the better things,” was not enough to uplift its workforce. On the contrary, creating wants without providing the means to achieve them could prove subversive and could stimulate discontent. Similarly, providing a monetary incentive, such as the profit sharing system, without guidance on using the newly found wealth could provide a dangerous facilitation of “bad habits” among workers. Therefore, Ford’s profit sharing system was designed to promote both a set of goals and the means to achieve them. In short, the company attempted to avoid the goals-means inconsistency for its workers, an issue that was introduced to sociologists and discussed by Robert K. Merton (1938). Indeed, it was not until two decades after Ford initiated his research program that Merton modified the Durkheimian concept of anomie to indicate a state of inconsistency between socially accepted goals and institutionalized means.

Yet Ford clearly implemented policies based on these principles to ensure the efficiency and stability of the workforce. He provided an attractive set of goals (uplifting to middle-class, buying a house and a car, and so on) and enforced a set of acceptable standards that facilitated the achievement of those goals. Ford emphasized Americanization, provided the required means to achieve it, and established a reward structure to guide the workers. The

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Company guided or “engineered” its workers toward adopting a conformist stance in support of the company’s profit-sharing guidelines.

Ford’s sociological project consisted of an effort at engineering the production of a stable and efficient workforce. The need for a stable workforce was in response to problems created by the extremely high rates of labor turnover. Approximately one half of the Detroit automotive workforce did not speak English, which further reduced the industry's efficiency. Efficiency was a buzzword among industrialists and employers in general during the 1910s, and it still is. In the minds of Henry Ford and his managers, it required industrious characters, happy families, temperance, and other behavioral and social traits.<sup>20</sup>

### CONCLUDING REMARKS

The historical moment of the Ford Sociological Department is of interest to social science, and in general, for many reasons. It can be seen as a pioneering effort in applied sociology. But beyond any reflexive implications for social science, the importance of the Department is also a result of the fact that it developed many of the processes that became central to the brand of capitalism that Gramsci (1972) called *fordismus*. It laid the foundations for what came to be called “Fordism,” and “welfare capitalism” (Foster, 1987). The Sociological Department established training programs intended to transform the newly arrived immigrants that comprised the bulk of Ford's workforce at that time into better citizens and workers.<sup>21</sup> Its activities during this period provide us with a classic example of human engineering, as it was then understood.


Seen in the context of human engineering, Ford’s sociological project became somewhat redundant once its primary goal was essentially fulfilled. In this respect, the project was a success. This conclusion contrasts with a more traditional perspective represented by Nevins (1957). He saw it, instead, as a failed humanitarian effort. Once shed of its welfare traits, it was succeeded by an even stricter regime. However, it is noteworthy that some thirty years after the introduction of the five-dollar day, Henry Ford II, in collaboration with union leader Walter Reuther, reinvigorated the efforts of the Ford Motor Company in its human engineering program. Indeed, as late as October 1945, Walter Reuther declared that “it is time [that] management realized that human engineering is just as important as mechanical engineering” (Lewis, 1976: 432).<sup>22</sup>

Despite the paternalistic capitalistic ideology characterizing the Ford Motor Company research, it is an interesting forerunner of the research methods and techniques that remain common. S.S. Marquis called the Ford sociological project, “a great experiment in applied Christianity in industry” (Kellogg, 1928:



555). We have argued here that it was also a great experiment in applied sociological research in industry. These unique efforts of the Ford Motor Company deserve clearer recognition in the applied sociological literature.

APPENDIX

Form 509  SPECIMEN No. E-9029

RECORD OF INVESTIGATION Name Stanislaw Dancz

Date (factory) 2-1-14 Date (home) 2-10-14 Dept.

Date of 1st lease Same

Date hired 1-28-14 Address 9011 John R. St., Merid. Yes Spoken English No Nationality Lithuanian

Religion Catholic Age 42 Date of Birth Jan. 2-1872 Naturalized No

Lived in Detroit How Long 6 years In U.S. 4 years No. of Children 5 Ages 11, 9, 8, 6 and 4 years

No. in School 3 No. Working None Earn Per week No. Persons Dependent Six

Name of Dependent	To What Extent	Total	Relationship	Wife	Age	Address
Hory			Wife		40	Same
Steva			Son		11	
Yevill			Son		9	
Antony			Son		8	
Vladislava			Daughter		6	
Miko			Son		4	

Own Home Lot No Location Value Rent or Rents Per Month \$20.00

Buying Home Lot No Cash Contract Value Amt. Paid Location

Mortgage Reported Contract Date None Reason

Name of Bank U.S. Postal Savings Pass Book No. 36219 Balance \$890.00 Location Detroit P.O.

Name of Life Insurance Co. None What Kind Amount Premium Per Year

Saving for No object Family Dr. None Address

Recreation None Habits Smokes. Drinks occasionally.

Home Conditions Poor. Crowded. Sixteen rooms occupied by twentyfive people, nineteen men, one woman and five children.

Neighborhood Manufacturing section.

Remarks Man's wife is working her life out caring for boarder. Children neglected.

I DISAPPROVE.

Information Secured From Whom Mrs. Mary Dancz - Wife and Observations Investigator's Name R. Roe AB

Approved for Show in Div. by JLO Date Filed 5/14/14 File No. 38 Size 61

Remarks

From Ford Times, vol. 8, no. 2, November 1914; p. 81.

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### NOTES

<sup>1</sup> In the conception and operationalization of labor relations, Henry Ford and his managers operated under their own version of scientific management ideology. These were combined with an insistence on open-shop policies, which lasted until 1941. The open-shop ideology, which preceded the ideology of scientific management, aimed at safeguarding the absolute authority of employers over their workforce and against labor unions. Ford's open-shop and scientific management policies were enforced -- not merely encouraged, by a Franklinian type of thrift (Nevins, 1957). Scientific management, which originated in Frederick Taylor's (1911; 1967) now famous work, aimed at exercising that authority in an efficient manner, and in light of the increasing complexity of organizations (Bendix, 1956). It involved the de-skilling of labor through simplification of work and the centralization of decision-making power to the management level (see Rupert, 1995).

<sup>2</sup> Company management maintained that profit sharing was a gift to the workers and not remuneration for services rendered. Marquis was emphatic on the issue: "There is no connection whatever between the employe's [sic] labor and share of profits given him. His work in the factory; his efficiency and length of service; his steadfastness and loyalty are not taken into consideration in determining whether or not he is qualified to receive them" ("Share of Profits - Wages," S.S. Marquis Papers, Acc. 293: 2). In fact, the so-called profit sharing plan was only indirectly linked to actual company profits. As Levin stated, profit sharing in 1914 "was not absolutely contingent on the earning of a definite sum by the company" (Levin, 1927: 78).

<sup>3</sup> Thus, the profit sharing portion gained by workers making \$2.50 was larger than that gained by employees already making \$4.50 a day. This is illustrated in the following table of hourly rates and corresponding profit sharing rates ("Compiling of Rates," S.S. Marquis Papers, Acc. 293):

Rate per Hour (\$)	Profit-Sharing Rate per Hour (\$)	Total Income per Hour (\$)	Total Income per Day (\$)
.80	.07 ½	.87 ½	7.00
.73	.11 3/8	.84 3/8	6.75
.68	.13 ¼	.81 ¼	6.50
.61	.17 1/8	.78 1/8	6.25

.54	.21	.75	6.00
.48	.23 $\frac{7}{8}$	.71 $\frac{7}{8}$	5.75
.43	.25 $\frac{3}{4}$	.68 $\frac{3}{4}$	5.50
.38	.27 $\frac{5}{8}$	.65 $\frac{5}{8}$	5.25
.34	.28 $\frac{1}{2}$	.62 $\frac{1}{2}$	5.00

<sup>4</sup> Marquis (1916: 914) argued, “We have made the discovery at the Ford that the family is also the basis of right economic and industrial conditions. The welfare of the factory, no less than the welfare of the state and church, depends upon the home.”

<sup>5</sup> One of the concerns of the day was that a sharp increase in the wages of workers would have a “bad effect” on the workers (“The Ford Profit-Sharing Plan,” S.S. Marquis Papers, Acc. 293: 9). It was believed that workers were not necessarily able to handle the raise. It was feared that it could fuel the expression of what were seen as unsociable acts, such as drinking and gambling. Marquis himself believed that this would be true had it not been for the services offered by the Sociological Department workers (“The Ford Profit-Sharing Plan,” S.S. Marquis Papers, Acc. 293: 9).

<sup>6</sup> To all appearances, the Ford Motor Company Sociological Department did not resemble academic sociological departments of today. It did not employ trained sociologists. Rather, as Lee (1916) boasted, all of the employees of the Department were recruited from within the organization. Nevertheless, the adoption of the term “sociological” implies some connection to the sociological ideas and discourse that were circulating in the 1910s. The actual degree to which there were substantial links between the Ford Sociological Department and the field of sociology remains an unanswered empirical question. Ford’s sociological project can be seen as an early attempt at “applied sociology” in the sense that it was client-driven. In addition, it attempted to apply a set of ideological and social scientific models to existing social relations in order to modify them. The term *sociology* was coined by Auguste Comte to denote a new science (the “queen of sciences”) that would explain (as well as predict and manage) social behavior. A reading of the various biographies of Henry Ford (and particularly the one authored by Marquis) indicates a link between “sociology” and a concern for human/social welfare.

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<sup>7</sup> Ford's sociological project generated both favorable and unfavorable views among scholars. Some saw it as Ford's humanitarian movement: a benevolent, if intrusive, paternalism (for example, see Nevins, 1957; Sward, 1948). This outlook probably originated with Marquis (1916; 1923). For an early critical comment, see Levin (1927). For more contemporary critical examinations of Ford's sociological project see Meyer (1981), Roediger (1988), and Rupert (1995). For an examination of how the popular press of the day received the announcement of the five-dollar-day, see Lewis (1976).

<sup>8</sup> It is interesting to note that *The Survey* was so called in honor of the Pittsburg Survey. Paul Kellogg, who conducted the Pittsburgh Survey, was by then the editor of the journal.

<sup>9</sup> These four documents are part of the S.S. Marquis Papers collection in the company archives (Acc. Number 940, Box 17). The documents consist of the following: Mr. Lee's Talk to First Group of Investigators, April 15<sup>th</sup>, 1914 (referenced here as Lee's First Talk); Mr. Lee's Talk to Second Group of Investigators, April 16<sup>th</sup>, 1914 (referenced here as Lee's Second Talk); Mr. Lee's Talk to Third Group of Investigators, April 17<sup>th</sup>, 1914 (referenced here as Lee's Third Talk); Mr. Lee's Talk to Investigators on July 7<sup>th</sup>, 1914 (referenced here as Lee's Talk on July 7).

<sup>10</sup> The term "he" is used here as the vast majority of the workers were men. Actually, the ideal worker for Ford was a *family* man.

<sup>11</sup> Note that when Marquis said "we keep back all his profits for that month," he actually meant "give back." (also see Levin, 1927: 79). Profits withheld from workers went in a charity fund (Marquis, Address to American Bankers Association, Acc. No. 63, box. 1). This fund aimed at helping employees and their families in times of need.

<sup>12</sup> Please note that the spelling of various ethnicities and nationalities in company discourse differs from the one we are accustomed to today (i.e. "Servians" instead of "Serbs"). Furthermore, some nationalities mentioned in company discourse, are no longer used (e.g., Bohemians). These refer to ethnic groups (within then existing European empires) rather than the national groups that we are familiar with today. The company claimed that workers' nationalities and ethnicities were self-reported, and, therefore, the differences

in spelling may be the result of lack of literacy or differences in usage at that time.

<sup>13</sup> According to the Sociological Department, decent housing meant housing in Dearborn neighborhoods. Ford politically controlled Dearborn, and police and other officials, sometimes curbed union activities following direct intervention by Henry Ford. Workers were usually urged to seek the advice of Sociological Department officers prior to purchasing land or housing. Thus they were channeled to one of the family owned, or affiliated real-estate companies.

<sup>14</sup> At this time, Henry Ford did not favor any system of financial credit for his employees, but instead promoted the idea of saving.

<sup>15</sup> Paradoxically, the first group to be fired after the establishment of the Sociological Department consisted of 700 Eastern Orthodox workers. They missed work because they were celebrating Christmas according to the Orthodox calendar, which differs from the calendar used by Protestants and Roman Catholics. It seems that immigrant assimilation did not always proceed with positive reinforcement.

<sup>16</sup> "There are about 40 per cent of the employees who have been disapproved, and of these, probably 20 per cent are under age, and would not qualify anyhow, but we want this bunch to get just as many of these foreigners into the fold in the least possible space of time" (Lee's Third Talk: 4).

<sup>17</sup> Lee (1916) commented on Detroit's "petty empires," headed by ethnic *padrones*. "Of course, it is to the interest of such men that these foreigners shall know nothing of the English language, of American ways and customs, or of local values, as these are things which would liberate them from the bondage (and it is nothing more or less) under which they have unconsciously been placed" (305-306).

<sup>18</sup> It is not clear whether Roberts was actually head of the school or if he only helped in setting it up (the school also used his textbooks). A passage in Hooker (1997) states that Roberts actually ran the Ford English School But no other reference was found in company discourse or public literature to suggest that Roberts actually headed the school. According to Lee (1916: 306), "We sought out Dr. Roberts – he came to Detroit, and there was organized the plan

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for giving all non-English-speaking employes [sic] a good basic knowledge of the English language through this system.”

<sup>19</sup> Roberts used his own, then famous, method for teaching English to immigrants, called the Roberts Method. It was based on the Berlitz system of learning English.

<sup>20</sup> During the early Twentieth-Century, applied sociology was in its infancy. It wasn't until 1906 that Lester Ward published his “Applied Sociology,” which became perhaps the most influential work in early American applied social science. “Applied sociology” was seen as a synonym of the term “human engineering” (a term that was favored by psychologists), or “societal engineering” (a term favored by sociologists), or merely “engineering.” “Once admit the conception of value into sociological study, and it becomes an applied science; a kind of Human Engineering, standing to Anthropology somewhat as Education stands to Psychology” (Myres, 1923: 165). Societal engineering was also called societal *telesis* (Giddings, 1924). Franklin Giddings (1924) argued that although societal telesis, or societal engineering have been “thought and talked about enough to have acquired a name,” it is a profession that has “hardly yet established” (13). This, in retrospect, points out the pioneering significance of the early Ford Motor Company's human engineering efforts.

<sup>21</sup> In its wider sense, “Fordism” refers to the large institutional structure initially developed and applied in the Ford Motor Company starting in the 1910s, and partially featuring characteristics such as “scientific management, the modern regulatory environment, Keynesianism, and the ‘welfare state’” (in Foster, 1987: 14).

<sup>22</sup> The term “human engineering” did not originate with Walter Reuther, as is implied in Lewis (1976) and Lacey (1986). Rather it was in use by psychologists and other social scientists since the early twentieth century (see, for example, Myres, 1923).

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