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Mairi Maclean , Gareth Shaw, Charles Harvey,  
and Gary Stringer

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## Methodological Openness in Business History Research: Looking Afresh at the British Interwar Management Movement

Much thought has been accorded to the evolving nature of business history. It is only relatively recently, however, that attempts have been made to articulate methodological issues in a more epistemologically explicit and reflexive fashion. This article contributes to this burgeoning agenda by examining the methodology underpinning an intensive archival study of the British interwar management movement (1918–1939), a major force in British management education between the wars. We explicate the methodology employed and question what this material tells us about the interwar management movement, in terms of its determination to modernize management, encourage openness between firms, and extend a new spirit of partnership. We show that the interwar management movement was characterized by organized cooperation and methodological openness. Our main contribution is to demonstrate that interpretations themselves can become entrenched and prone to inertia, inviting us to revisit these periodically and, if appropriate, recast them.

**Keywords:** British interwar management movement, business history, digital archives, methodology, Rowntree business lectures

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Much thought has been accorded to the evolving nature of business history. Attention has turned to how the discipline might best develop in the twenty-first century, notably by publishing research that addresses important questions with an impact that reaches beyond the specialism.<sup>1</sup> Doing so should enable business historians to demonstrate why “history matters,” thereby building a stronger scholarly community.<sup>2</sup> We live in a time when history is being openly contested, so the value of this opportunity for business historians to demonstrate that their research is impactful by addressing the “grand challenges” of the age is beyond question.<sup>3</sup>

An essential element of this debate has been how business history and theory can be better integrated to produce contextually informed theoretical narratives, wherein historical specificities are informed by theoretical insights.<sup>4</sup> In defining business history as the study of “the origins, growth and performance of business as an institution,” Mira Wilkins highlighted the need for an “analytic framework, a theoretical context,” since business history “must ultimately conceptualize, sort out the detail, and define the broad issues.”<sup>5</sup> This debate has gathered momentum in recent years, and in many respects what Peter Clark and Michael Rowlinson termed the “historic turn” in organizational research is now well on its way to being accomplished.<sup>6</sup>

A second and increasingly prominent strand of this debate concerns methodology. It is noteworthy that the editors of the *Business History*

<sup>1</sup> Walter A. Friedman and Geoffrey Jones, “Business History: Time for Debate,” *Business History Review* 85, no. 1 (Spring 2011): 1–8; Mairi Maclean, Charles Harvey, and Stewart R. Clegg, “Organization Theory in Business and Management History: Present Status and Future Prospects,” *Business History Review* 85, no. 3 (Autumn 2017): 457–81; Scott Taylor, Emma Bell, and Bill Cooke, “Business History and the Historiographical Operation,” *Management and Organizational History* 4 (May 2009): 151–66.

<sup>2</sup> Friedman and Jones, “Time for Debate,” 1; Geoffrey Jones and Taryn Khanna, “Bringing History (Back) into International Business,” *Journal of International Business Studies* 37 (July 2006): 453–68, 453.

<sup>3</sup> Geoffrey M. Hodgson, *Conceptualizing Capitalism: Institutions, Evolution, Future* (Chicago, 2015).

<sup>4</sup> Paul C. Godfrey, John Hassard, Ellen S. O’Connor, Michael Rowlinson, and Martin Ruef, “What Is Organizational History? Towards a Creative Synthesis of History and Organization Studies,” *Academy of Management Review* 41 (Oct. 2016): 590–608; Matthias Kipping and Behlül Üsdiken, “History in Organization and Management Theory: More Than Meets the Eye,” *Academy of Management Annals* 8 (2014): 535–88; Mairi Maclean, Charles Harvey, and Stewart R. Clegg, “Conceptualizing Historical Organization Studies,” *Academy of Management Review* 41 (Oct. 2016): 609–32; Mairi Maclean, Stewart R. Clegg, Roy Suddaby, and Charles Harvey, eds., *Historical Organization Studies: Theory and Applications* (London, 2021).

<sup>5</sup> Mira Wilkins, “Business History as a Discipline,” *Business and Economic History* 17 (1988): 1–7, 5, 3, 4.

<sup>6</sup> Peter Clark and Michael Rowlinson, “The Treatment of History in Organization Studies: Towards an ‘Historic Turn,’” *Business History* 46 (July 2004): 331–52.

Review identify “inadequate methodology—or the lack of an agreed methodology”—as a fundamental issue underpinning what they term “the subject’s perennial identity crisis.”<sup>7</sup> As they observe, while Alfred D. Chandler’s “greatest contribution to the field was to put in place a respectable methodology that, for a time, was widely accepted,” ongoing criticism of his work has since overshadowed his methodological achievements.<sup>8</sup> Methodology has taken a back seat in much business historical research. It is only relatively recently that attempts have been made to articulate methodological issues in a more epistemologically explicit fashion, recognizing perhaps that methodological openness is a prerequisite for publication in mainstream organization journals.<sup>9</sup> Providing details of research methods that others might follow, as recounted, for example, by Rowlinson with respect to his exploration of the Cadbury archive, are not yet the norm.<sup>10</sup> However, greater methodological openness is exactly what is needed to engage successfully in “historical truth telling” and demonstrate the unique contribution business history can make to understanding the grand challenges of the present.<sup>11</sup> Andrew Smith and Maki Umemura argue that while business historians have begun to debate methodological issues, acknowledging the importance of methodological rigor in reaching a wider audience, the field has yet to embrace research transparency.<sup>12</sup> While some business historians

<sup>7</sup> Walter A. Friedman and Geoffrey Jones, “Debating Methodology in Business History,” *Business History Review* 85, no. 3 (Autumn 2017): 443–55, 443.

<sup>8</sup> Friedman and Jones, 443. Alfred D. Chandler, Jr., *Strategy and Structure: Chapters in the History of the American Industrial Enterprise* (Cambridge, MA, 1962); *The Visible Hand: The Managerial Revolution in American Business* (Cambridge, MA, 1977); and, with Takashi Hakino, *Scale and Scope: The Dynamics of Industrial Capitalism* (Cambridge, MA, 1990). See Marcelo Bucheli, Joseph T. Mahoney, and Paul M. Vaaler, “Chandler’s Living History: The Visible Hand of Vertical Integration in Nineteenth Century America Viewed under a Twenty-First Century Transaction Cost Lens,” *Journal of Management Studies* 47 (July 2010): 859–83, 861.

<sup>9</sup> Stephanie Decker, Matthias Kipping, and R. Daniel Wadhvani, “New Business Histories! Plurality in Business History Research Methods,” *Business History* 57 (2015): 30–40; Kenneth Lipartito, “Historical Sources and Data,” in *Organizations in Time: History, Theory, Methods*, eds. Marcelo Bucheli and R. Daniel Wadhvani (Oxford, 2014), 284–304; Andrew Perchard, Niall G. MacKenzie, Stephanie Decker, and Giovanni Favero, “Clío in the Business School: Historical Approaches in Strategy, International Business and Entrepreneurship,” *Business History* 59 (2017): 904–27; JoAnne Yates, “Understanding Historical Methods in Organization Studies,” in Bucheli and Wadhvani, *Organizations in Time*, 265–83.

<sup>10</sup> Michael Rowlinson, “Historical Research Methods,” in *Research in Organizations: Foundations and Methods of Inquiry*, eds. Richard A. Swanson and Elwood F. Holton III (San Francisco, 2005), 295–311.

<sup>11</sup> Mary O’Sullivan and Margaret Graham, “Guest Editors’ Introduction: Moving Forward by Looking Backward: Business History and Management Studies,” *Journal of Management Studies* 47 (July 2010): 775–90, 776; Andrew M. Pettigrew, “Longitudinal Field Research on Change: Theory and Practice,” *Organization Science* 1 (Aug. 1990): 267–92.

<sup>12</sup> Andrew Smith and Maki Umemura, “Prospects for a Transparency Revolution in the Field of Business History,” *Business History* 61 (2019): 919–41; Jones and Khanna, “Bringing History (Back).”

have interpreted the move toward greater methodological openness as threatening, such an endeavor might nevertheless enhance their interaction with scholars across the humanities and social sciences.<sup>13</sup>

This article contributes to this developing agenda. It does so by examining the methodology underpinning an intensive archival study of the British interwar management movement (1918–1939). The interwar management movement was a major force in management education in Britain between the wars. Orchestrated by a network of leading businesspeople, foremost among whom was Quaker industrialist and social reformer Benjamin Seebohm Rowntree, it represented a concerted effort to bring new ideas directly to British firms to improve their problem-solving capacities at a time of economic turbulence. Unusually, in a business environment hitherto typified by secrecy and lack of trust, the movement was founded on principles of organized cooperation, mutual service, and the free interchange of information. The sociopolitical conjuncture of the day was characterized by severe economic fluctuations, industrial unrest, and bouts of mass unemployment, most notably during the long depression of 1929 to 1933. This exercise in collective, peer-to-peer practical learning to improve British management was therefore pragmatically motivated.<sup>14</sup>

The purpose of this article is twofold, focusing on both methodology and historical interpretation. Methodologically, our aim is to introduce a large volume of recently recovered and newly available archival material to a new audience. We explicate the methodology used to develop our digital archive, passing on our experience to interested scholars. Interpretively, our aim is to question what this material tells us about the British interwar management movement, challenging long-held suppositions with respect to the determination to modernize management, encourage openness between firms, and extend a new spirit of partnership. Our intention is to establish the scale and scope of interest in progressive management theory and practice in interwar Britain. Our main contribution is to demonstrate that interpretations themselves can become calcified and suffer from inertia and that it is important to peel away what may result in a “thick crust of narrative interpretations,” to set the record straight.<sup>15</sup> There is also a moral obligation for doing so,

<sup>13</sup> Kevin Daniel Tennent, “Management and Business History—A Reflexive Research Agenda for the 2020s,” *Journal of Management History* 27 (2021): 80–98.

<sup>14</sup> Mairi Maclean, Gareth Shaw, Charles Harvey, and Alan Booth, “Management Learning in Historical Perspective: Rediscovering Rowntree and the British Interwar Management Movement,” *Academy of Management Learning & Education* 19 (Mar. 2020): 1–20.

<sup>15</sup> Michael Rowlinson and John Hassard, “The Invention of Corporate Culture: A History of the Histories of Cadbury,” *Human Relations* 46 (Mar. 1993): 299–326, 302.

in terms of giving the actors involved the credit they are due. By making our material readily available, others can independently read and interpret the sources to verify or challenge the revisionist interpretation we favor.

Our article proceeds as follows. First, we review the literature on methodology in business history research, particularly concerning the use of archives, and introduce the interwar management movement and the interpretations it has inspired. Next, we explain the methodological steps we followed in recovering the interwar management movement material and making it available to others. We then investigate the interwar management movement in greater depth, including the impetus to modernize British management, the organized cooperation that permeated the movement, and the move toward greater industrial democracy. Finally, we discuss our findings, assess their implications for theory, and consider the limitations of our research alongside the possibilities for further research.

### Methodological Openness and the British Interwar Management Movement

*Bringing archives into the open.* According to the *Oxford English Dictionary*, an archive is “a collection of historical documents or records providing information about a place, institution, or group of people.” Archival research methods have long been favored by business historians as their primary fieldwork method *par excellence*, in recognition of the fact that in the study of organizational change, organizational processes leave behind evidentiary traces.<sup>16</sup> Max Weber observed that the modern corporation rests on written texts in the form of countless files produced by organizations.<sup>17</sup> As Karl Weick asserted, organizations are systems of “talk,” with most organizational realities being founded on narration.<sup>18</sup> The documentary legacy organizations leave behind represents the action-oriented “embodiments of sedimented, accumulated talk,” both the meaningful and the mundane.<sup>19</sup>

It is only relatively recently that business historians have begun to better explicate their historical methodology, which has often tended to remain implicit.<sup>20</sup> This fuller articulation of historical, especially

<sup>16</sup> Pettigrew, “Longitudinal Field Research”; Michael R. Hill, *Archival Strategies and Techniques* (London, 1993).

<sup>17</sup> Max Weber, *Economy and Society: An Outline of Interpretive Sociology* (Berkeley, CA, 1968), 957.

<sup>18</sup> Karl Weick, *Sensemaking in Organizations* (London, 1995), 127.

<sup>19</sup> Marc J. Ventresca and John W. Mohr, “Archival Research Methods,” in *The Blackwell Companion to Organizations*, ed. Joel A. C. Baum (Oxford, 2002), 805–28, 806.

<sup>20</sup> Stephanie Decker, “The Silence of the Archives: Business History, Post-colonialism and Archival Ethnography,” *Management & Organizational History* 8 (2013): 155–73.

archival, methods is paying dividends as business historians extend their reach to engage a wider audience in organization studies. It is also a *sine qua non* to demonstrate the robust primary research that employs “creative and rigorous methodologies” in fashioning broader generalizations from empirical insights, as demanded by the editors of the present journal.<sup>21</sup> Notable organization theorists, including Philip Selznick and Alfred Kieser, have used archives in their own seminal works.<sup>22</sup> Yet even today, some organizational scholars remain skeptical about the intrinsic value of using archives as sources of data.<sup>23</sup> This reinforces the need for business historians to explain fully the methodologies they follow, to show that the exploration of archives allows them to dig deeper into their chosen topics and thereby “learn things that cannot be found by turning over the topsoil of present day human experience as reflected in current theory.”<sup>24</sup>

Archives have been described as institutions implicated in the production of knowledge.<sup>25</sup> Jacques Derrida points to the importance of archives for the preservation of collective memory.<sup>26</sup> This highlights the nature of archives as a “cornerstone of a free and informed society,” like libraries, providing information available to all.<sup>27</sup> Archives represent a distinctive resource that affords a valuable means of access to organizations, events, and individuals from former times, offering a window on the rich details of previous organizational existences.

Despite these benefits, archival sources are not self-explanatory, since they do not speak for themselves, necessitating interpretation. As Stefan Schwarzkopf argues, they allow “certain things to be seen, always at an angle, while most parts are blocked off to the gaze.”<sup>28</sup> Archives require the researcher to take something from them and impose an analytic structure on their corpus of material—what Hayden

<sup>21</sup> Friedman and Jones, “Time for Debate,” 2.

<sup>22</sup> Philip Selznick, *TVA and the Grass Roots* (Berkeley, CA, 1949); Alfred Kieser, “From Freemasons to Industrious Patriots: Organizing and Disciplining in 18th Century Germany,” *Organization Studies* 19 (Jan. 1998): 47–71.

<sup>23</sup> Andrew Popp and Susanna Fellman, “Power, Archives and the Making of Rhetorical Organizational History: A Stakeholder Perspective,” *Organization Studies* 41 (Nov. 2019): 1531–49.

<sup>24</sup> Lipartito, “Historical Sources,” 285. See Amon Barros, Adéle de Toledo Carneiro, and Sergio Wanderley, “Organizational Archives and Historical Narratives,” *Qualitative Research in Organizations and Management* 14 (2019): 280–94.

<sup>25</sup> Popp and Fellman, “Power, Archives,” 1534.

<sup>26</sup> Jacques Derrida, *Archive Fever: A Freudian Impression* (Chicago, 1995), 4.

<sup>27</sup> Manoff, “Theories of the Archive,” 19; Charles Harvey, Mairi Maclean, Jillian Gordon, and Eleanor Shaw, “Andrew Carnegie and the Foundations of Contemporary Entrepreneurial Philanthropy,” *Business History* 53 (2011): 424–48.

<sup>28</sup> Stefan Schwarzkopf, “What Is an Archive—And Where Is It? Why Business Historians Need a Constructive Theory of the Archive,” *Business Archives* 105 (Nov. 2012): 1–9, 3.

White refers to as “explanation by emplotment.”<sup>29</sup> Some things can be discounted, and others not. Hence, there is always an element of selectivity, in terms of both sources contained within an archive and the subsequent crafting of an analytic narrative.<sup>30</sup> The task for the researcher is therefore one of wayfinding: to find one’s way through the material surveyed in order to produce and evaluate a narrative, itself a form of synthesis.<sup>31</sup> Considered thus, it is not simply a matter of writing history; it is about using archives to generate organizational theory, for the purposes of theorizing organizations.<sup>32</sup> Since archives are by definition often large, unwieldy sources of information that require analysis and narrative to be legible, this is not always straightforward.<sup>33</sup>

One of the issues here concerns the longstanding tension between the case-based interpretative work prized in business history, temporally and contextually embedded, and the broader theorizing prevalent in the social sciences and favored by organization theorists. Business history has long faced this tension. One thing that distinguishes business history as a field distinct from organization studies is that even if organization scholars do use history, the objectives tend to be different, in terms of understanding the situated nature of a richly empirical focal case (for business historians) as opposed to generating broader theory (for organization theorists). For the former, the analysis of rich empirical cases generates new insights, whereas for the latter, it is crafting a novel theoretical contribution that matters most. It is often assumed that history does not have theory, which calls for further debate on the nature of historical theory, including who is permitted to have theory and who is not.<sup>34</sup> Being cognizant of these differing goals is important when seeking to use archival methods to generate theory.

The impetus for greater methodological transparency is therefore also about articulating the unique contributions that business historical research can make. Kathleen Eisenhardt famously elucidated how case

<sup>29</sup> Hayden White, *Metahistory: The Historical Imagination in Nineteenth-Century Europe* (Baltimore, 1973), 7.

<sup>30</sup> Naomi R. Lamoreaux, “Rethinking Microhistory: A Comment,” *Journal of the Early Republic* 26 (Winter 2006): 555–61.

<sup>31</sup> Hayden White, *The Content of the Form: Narrative Discourse and Historical Representation* (Baltimore, 1987).

<sup>32</sup> Michel de Certeau, *The Writing of History* (New York, 1988).

<sup>33</sup> Susanna Fellman and Andrew Popp, “Lost in the Archive: The Business Historian in Distress,” in *Coping with Excess: How Organizations, Communities and Individuals Manage Overflows*, ed. Barbara Czarniawska and Orvar Löfgren (Cheltenham, 2013), 216–43.

<sup>34</sup> Andrew B. Hargadon and R. Daniel Wadhvani, “Theorizing with Microhistory,” *Academy of Management Review* (advance online publication 14 June 2022), <https://doi.org/10.5465/amr.2019.0176>.

studies might be used to generate theory.<sup>35</sup> Yet, as Eero Vaara and Juha-Antti Lamberg argue, the historical elements of strategic processes are poorly understood.<sup>36</sup> Different historical periods have their own social, economic, and business dynamics.<sup>37</sup> Our study of the interwar management movement is a case in point: a complex, turbulent time when the sociopolitical context loomed large and British industry needed a big idea. Business historians are uniquely positioned to draw inferences founded on deep historical understanding of the situated sociohistorical environments in which individuals and events are located, emphasizing context-specific embeddedness in the generation of conceptual conclusions.<sup>38</sup> As Daniel Raff observes, moments of key strategic decision making make better sense when grounded in their sociopolitical environments, whereby fine-grained microhistorical detail illuminates the macro-level “big picture of what is to be explained.”<sup>39</sup> Enhancing methodological reflexivity is therefore about becoming more comfortable with the language of historical theorizing.

The push for methodological openness has gained momentum from the movement for open access, whereby published material is made freely available to all, promoting inclusion of the wider public, on the basis that public good should come from public funding. Consistent with the move toward greater methodological reflexivity and visibility, improving research transparency is also about increasing the credibility and external validity of the research process, building trust in readers that “what you see is what you get.”<sup>40</sup> This underlines the importance of openness about actual processes followed, as well as the explicit articulation of these.<sup>41</sup> Society has witnessed a broader “digital transition” in recent years, of which the trend toward the digitization of archival resources forms an integral part.<sup>42</sup> This presents both opportunities

<sup>35</sup> Kathleen M. Eisenhardt, “Building Theories from Case Study Research,” *Academy of Management Review* 14 (Oct. 1989): 532–50.

<sup>36</sup> Eero Vaara and Juha-Antti Lamberg, “Taking Historical Embeddedness Seriously: Three Historical Approaches to Advance Strategy Process and Practice Research,” *Academy of Management Review* 41 (Oct. 2016): 633–57.

<sup>37</sup> O’Sullivan and Graham, “Guest Editors’ Introduction.”

<sup>38</sup> Kipping and Üsdiken, “History in Organization and Management Theory.”

<sup>39</sup> Daniel M. G. Raff, “How to Do Things with Time,” *Enterprise & Society* 14 (Sept. 2013): 435–66, 441.

<sup>40</sup> Tennent, “Management and Business History”; Yates, “Understanding Historical Methods,” 281; Herman Aguinis, Ravi S. Ramani, and Nawaf Alabduljader, “What You See Is What You Get? Enhancing Methodological Transparency in Management Research,” *Academy of Management Annals* 12 (Jan. 2018): 83–110.

<sup>41</sup> Andreas Schwab and William H. Starbuck, “A Call for Openness in Research: How to Turn Covert Practices into Helpful Tools,” *Academy of Management Learning & Education* 16 (Mar. 2017): 125–41.

<sup>42</sup> Adam Nix and Stephanie Decker, “Using Digital Sources: The Future of Business History?,” *Business History* (2021): 1–24.

for business historians, given their deeply rooted familiarity with archives, and challenges. Challenges include the costs of making data digitally available, which can be considerable; hence, the opening of archives must be balanced with funding considerations. The labor-intensive nature of the task needs to be considered. There are issues of access and of the ownership of copyright on the part of individual archives, whose agreement is needed for the publication of original sources. Sharing material online implies a certain loss of control. There is the risk that software selected for use may not fulfill the needs of a particular research project and may even become obsolete.<sup>43</sup> Concerns for the sustainability of data archiving are also relevant, particularly for digital archives, as the potential exists for digitized resources simply to disappear.<sup>44</sup> Addressing these challenges requires financial support, which institutions cannot always afford. This may cause problems for academics who choose to move universities.<sup>45</sup> On the plus side, however, digital formats can give original sources renewed voice, offering fresh insight into prior organizational life.<sup>46</sup> This is especially the case when a digital archive is created with materials from multiple repositories or is enhanced by oral history interviews.<sup>47</sup> When original interview recordings still exist, digitization can offer the experience of hearing the interviewee speak at first hand, not just *in propria persona* but literally in his or her own voice, complete with accent, timbre, intonation, and hesitations. Recovering voices from the past in this way affords a potentially priceless window on former organizational realities.<sup>48</sup>

*Exploring the British interwar management movement.* There were three main strands to the British interwar management movement. First, following the Quaker Employer Conference convened by prominent industrialists Edward Cadbury and Seebohm Rowntree in April 1918, which sought to initiate a new way of doing business, Seebohm Rowntree organized a second series of meetings: the Rowntree business lectures.<sup>49</sup> The Rowntree lectures aimed in a novel fashion to bring together employers and employees from different levels of the organizational hierarchy, alongside speakers from various walks of life, to debate

<sup>43</sup> Charles Harvey and Jon Press, *Databases in Historical Research* (New York, 1996), 257–60.

<sup>44</sup> Manoff, “Theories of the Archive.”

<sup>45</sup> Smith and Umemura, “Prospects for a Transparency Revolution.”

<sup>46</sup> Nix and Decker, “Using Digital Sources,” 17.

<sup>47</sup> Paul Thompson, *The Voice of the Past: Oral History* (Oxford, 2000).

<sup>48</sup> Valeria Giacomini and Geoffrey Jones, “Drivers of Philanthropic Foundations in Emerging Markets: Family, Values and Spirituality,” *Journal of Business Ethics* (2021): 1–20.

<sup>49</sup> Karen Tibbals, “Quaker Employer Conference of 1918,” in *Quakers, Business and Corporate Responsibility*, eds. Nicholas Burton and Richard Turnbull (Cham, Switzerland, 2019): 61–77.

the thorny issues facing industry. Second, Rowntree returned from a visit to the United States in 1921 with the idea that industrialists in different parts of the United Kingdom should meet regularly in groups of ten to fifteen to explore and find solutions to the problems before them. This initiative engendered the Management Research Groups (MRGs), formed as a vehicle for the interchange of ideas, collecting and disseminating information, and debating business issues.<sup>50</sup> The third element concerned directors' dinner discussions, at first by invite only but later open to all.

While the Cadbury conferences have been studied extensively, alongside Cadbury management practice, far less is known about the Rowntree business lectures and MRGs, which have been relatively overlooked.<sup>51</sup> The little attention they have attracted has tended to be critical and disparaging.<sup>52</sup> John Child points to "industry's indifference to the development of new ideas and concepts" between the wars.<sup>53</sup> John Wilson stresses that, far from espousing new approaches to management, British businessmen of the era resisted new approaches, with little sign of any "wholesale change in attitudes towards organisation and management."<sup>54</sup> The British management movement has been described as limited to "relatively few intellectuals" and beyond the purview of most practicing managers.<sup>55</sup> Richard Whitley and his colleagues assert that its members "found themselves preaching to a largely unresponsive audience."<sup>56</sup> Conversely, André Spicer, Zahira Jaser, and Caroline Wiertz suggest that the movement "highlighted the ethic of professionalism, managers' wider responsibilities, and their contribution to the well-being of the wider communities."<sup>57</sup> The weight of opinion, however, is that British interwar management was generally backward, short-termist, and dominated by rule-of-thumb techniques,

<sup>50</sup> Shirley P. Keeble, "Management Research Groups," *Business Archives* 47 (1981): 44–47.

<sup>51</sup> John Child and Chris Smith, "The Context and Process of Organizational Transformation—Cadbury Limited in Its Sector," *Journal of Management Studies* 24 (Nov. 1987): 565–93; Rowlinson and Hassard, "Invention of Corporate Culture."

<sup>52</sup> Edward Brech, Andrew Thomson, and John F. Wilson, *Lyndall Urwick, Management Pioneer: A Biography* (Oxford, 2010), 38–40; John F. Wilson and Andrew Thomson, *The Making of Modern Management: British Management in Historical Perspective* (Oxford, 2006), 182.

<sup>53</sup> John Child, *British Management Thought: A Critical Analysis* (London, 1969), 103.

<sup>54</sup> John F. Wilson, *British Business History, 1720–1994* (Manchester, 1995), 156, 157.

<sup>55</sup> Wilson and Thomson, *Making of Modern Management*, 181.

<sup>56</sup> Richard Whitley, A. B. Thomas, and Jane Marceau, *Masters of Business: The Making of a New Elite?* (London, 1981), 32, cited in Wilson and Thomson, *Making of Modern Management*, 181.

<sup>57</sup> André Spicer, Zahira Jaser, and Caroline Wiertz, "The Future of the Business School: Finding Hope in Alternative Pasts," *Academy of Management Learning & Education* 20 (Sept. 2021): 459–66.

displaying little appetite for new ideas.<sup>58</sup> Yet the fact that the MRGs stayed the course, with some continuing into the 1970s and others surviving as independent local associations in the twenty-first century, implies an alternative assessment.<sup>59</sup>

## Methodology

*Research process.* Our project on the British interwar management movement proved to be intensively archival in nature. Over a period of three years, from 2016 to 2019, the research team collected material from numerous archives: the Alfred Gillett Trust; Bodleian Library, University of Oxford; Borthwick Institute for Archives, University of York; Bristol Archives; British Library; London Metropolitan Archives; London School of Economics (LSE) Special Collections; Modern Record Office, University of Warwick; National Archives; Nottinghamshire Archives; Suffolk Records Office; Unilever Art, Archives and Record Management; University of Reading Special Collections; and Walgreens Boots Alliance Heritage. Many were visited repeatedly as we tracked down missing lectures. Our search strategy was comprehensive, in that we tried to locate all the lecture material available. We managed to find material from thirty-eight out of a possible forty-two conferences. Additionally, to explore how far delegates implemented what they learned in their own firms, we collected documents concerning the movement's impact on firms such as Boots, British Xylonite, Clarks, Dunlop, Lyons, Rowntree's, and Imperial Tobacco. This proved more challenging and is currently ongoing. One reason for this is the ever-present danger of records being destroyed, a problem highlighted by Harry Ward, secretary of MRG 1 and chief executive of the MRG national organization from 1935, in a series of audiotapes we recovered by happenstance from the LSE. Recorded in 1979 by Shirley Keeble at the Business History Unit, these tapes, as far as we know, had never been transcribed nor exploited in any previous project.<sup>60</sup> We obtained permission from the LSE to bring them to the Digital Humanities Hub at the University of Exeter, where they were digitized. The recordings are available on our project website (<https://rowntree.exeter.ac.uk>) as transcripts and audio files, the latter enabling others to hear Ward's spoken words, consonant with our intention of sharing an experience with other researchers. On the destruction of documentary records, Ward reflects, "companies who have done very careful studies commonly

<sup>58</sup> Chandler, *Scale and Scope*.

<sup>59</sup> Brech, Thomson, and Wilson, *Lyndall Urwick*, 40.

<sup>60</sup> Wilson and Thomson, *Making of Modern Management*.

scrapped the studies and they are not available even to the people in the same companies. . . . This is one of the real difficulties.”<sup>61</sup> This sentiment resonates with business historians who regularly encounter similar issues in their own research.<sup>62</sup>

The experience of visiting a paper-based archive has changed considerably in recent years, such that scholars increasingly come to photograph documents rather than to photocopy or to read them. This was the case with our project, where the need to systematically capture large numbers of texts exceeded the capacity of researchers to read, note, and analyze the material *in situ*. Rowlinson records his experience of “poring over documents in the Cadbury library” as a doctoral researcher.<sup>63</sup> There is an evident tension between capturing material and interrogating it. Photographing documents—initially using a high-specification Olympus camera but later, and equally effectively, an iPhone—proved a time- and cost-saving solution. It also helped in preventing damage to files and individual documents. Rowlinson draws attention to the manner in which documents in the Cadbury archive were kept.<sup>64</sup> Much of the material we found was in a fragile condition, which honed our motivation to collect and preserve it, to prevent it from being lost to history, while taking good care of the originals.

Our objective was to make the Rowntree lectures and other materials available to scholars and interested parties through an online electronic archive created using the open-source content management system Omeka. A guiding principle of our study was format authenticity.<sup>65</sup> Faithfulness to the original document, unaltered by the research team other than to manually edit typographical errors arising from the use of optical character recognition (OCR) software, was for us an important ethical principle. The free-to-use, public-facing website we have created features collections of lectures from the conferences, MRG annual reports and bulletins, details of directors’ dinner discussions, transcripts and audio files of retrospective interviews with Harry Ward, biopics of individual actors, and a timeline of events, all in an interactive, searchable format. The public-access website will be managed for at least ten years, and longer depending on demand, and the digital archive curated in perpetuity. We continue to add to it as and when material relevant to our project is located.

<sup>61</sup> Harry Ward, personal interview by Shirley Keeble, 1979. Available online at University of Exeter, accessed 18 Nov. 2022, <https://rowntree.exeter.ac.uk/>.

<sup>62</sup> Schwarzkopf, “What Is an Archive,” 4.

<sup>63</sup> Rowlinson, “Historical Research Methods,” 301.

<sup>64</sup> Rowlinson, 302.

<sup>65</sup> Nix and Decker, “Using Digital Sources,” 5.

In terms of attributing to actors involved in the movement the credit they deserve, identifying individuals was sometimes tricky, especially since the lectures drew on speakers from varying backgrounds and levels of organizational hierarchies, not all of whom were well known. There is an important principle here, as Ward discerned: “In justice to many people, I ought to record names of many whose names will never appear publicly anywhere else. . . . Remarkable men have done remarkable jobs and their work has not been pursued.”<sup>66</sup> It is often said that powerful people feature disproportionately in archives, which are criticized for focusing on so-called great men and their actions.<sup>67</sup> The involvement of individuals from different organizational levels was novel at the time and something that Rowntree had learned from his wartime service in the Ministry of Munitions. As Ward expressed it, “When I called meetings on office work some companies would send wages clerks and others would send a managing director.”<sup>68</sup> The movement features a wide cast of participants, for whom we sought to write biographical portraits. Taken together, these portraits comprise a collective biography of key actors, uncovering collaborative networks informed by the principle of “thinking together,” a concept that participants themselves used long before it was fashionable in the communities of practice literature.<sup>69</sup> As the Master of Balliol College, Alexander Dunlop Lindsay, stated in 1925, “The mind profits more by genuine serious discussion, in a suitable environment, where there is leisure, a sense of fellowship, and a determination to ‘thrash things out.’ We are beginning to understand something of the technique of thinking together.”<sup>70</sup>

*The Rowntree lectures.* The Rowntree lecture series commenced in April 1919 and ran approximately biannually until the start of World War II. The conferences were held at Blackpool, Durham, Scarborough, and York before settling in 1922 on Balliol College, Oxford, as a regular venue. As war beckoned, they moved to Lady Margaret Hall, with the final conference being held in Holywell Manor, Oxfordshire, in January 1940.<sup>71</sup>

<sup>66</sup> Ward, interview.

<sup>67</sup> Hill, *Archival Strategies*, 17. See Mairi Maclean, Charles Harvey, and Roy Suddaby, “Institutional Biography and the Institutionalization of a New Organizational Template: Building the Global Branded Hotel Chain,” *Business History* (advance online publication, 10 Feb. 2022), <https://doi.org/10.1080/00076791.2022.2031988>.

<sup>68</sup> Ward, interview.

<sup>69</sup> Igor Pyrko, Viktor Dörfler, and Colin Eden, “Thinking Together: What Makes Communities of Practice Work,” *Human Relations* 70 (Apr. 2017): 389–409.

<sup>70</sup> Alexander Dunlop Lindsay, “Concluding Lecture,” *Lecture Conference for Works Directors, Managers, Foremen, Forewomen held at Balliol College, Oxford* (16–20 Apr. 1925).

<sup>71</sup> “Editorial,” *British Management Review* 4 (1940): 3–4, 3.

The lectures combined public policy discussions with practical demonstrations of new managerial methods. In all, approximately 280 papers were delivered by around two hundred lecturers, with delegates sent from about 450 companies. All conferences from April 1920 onward provide lists of firms attending (varying from 33 companies to more than 70 at times of crisis), with around six delegates representing each company. Many participating firms came from Yorkshire, Lancashire, and the Midlands, until the move to Balliol College made the conferences more accessible to southern firms. A core of Quaker firms consistently supported the conferences, including chocolate manufacturers Rowntree, Cadbury, and Fry, biscuit maker Huntley and Palmer, household-product manufacturer Reckitt & Sons, shoemakers C. & J. Clark, and clothmaker Fox Brothers of Somerset. The declared intent of the lecture series was to inform participating managers, foremen, and forewomen about new organizational methods and approaches. World War I had generated “irresistible pressure for the reorganization and reorientation of society” on a more equitable basis, fomenting worker unrest and demands for industrial democracy.<sup>72</sup> A core objective was therefore to allow employers to hear the labor perspective, to discover what the workers wanted, indicating a new receptivity to different viewpoints. To this end, the conferences attracted a wide range of speakers from assorted backgrounds, including artists, businesspeople, economists, foremen, forewomen, historians, industrial psychologists, musicians, organizational theorists, politicians, supervisors, unionists, and works managers. Renowned business scholars of the day were invited to speak, including Boston industrialist Henry Dennison, theorist Mary Parker Follett, and industrial psychologist Elton Mayo, alongside British business academics like George Allen, professor of commerce at the University of Hull.

What quickly came to dominate in the early lectures was Rowntree’s vision. In a lecture delivered in March 1920, before he visited the United States, Rowntree set out the principles of industrial administration as he saw it—effectively explaining how best to manage. Managers, he insisted, should be educated, see the world systematically, begin their training on the shopfloor, and read widely. He furnished a reading list for managers. Notably, he believed an understanding of history to be essential for works managers and directors: “A man of that type should read industrial history, factory legislation, the history of Trade Unionism, and so forth.”<sup>73</sup> The emphasis in this early lecture on the importance of

<sup>72</sup> Arthur Marwick, *The Deluge: British Society and the First World War* (London, 1965), 289; W. Jett Lauck, *Political and Industrial Democracy, 1776–1926* (New York, 1926).

<sup>73</sup> B. Seeborn Rowntree, “Training for Industrial Administration,” *Lecture Conference for Works Directors, Managers, Foremen, Forewomen, Durham* (19–22 Mar. 1920).

getting together in “study circles” and site visits to factories to see “what other people were doing” effectively mapped out the terrain for what became the MRGs.<sup>74</sup>

*Management Research Groups.* The MRGs drew inspiration from Henry Dennison’s Manufacturers’ Research Association, formed in Boston, Massachusetts, in 1922, at which managers of a dozen noncompeting organizations (including Harvard University) met regularly to debate issues of concern on a confidential basis. The MRGs began in June 1926 at a meeting convened by Rowntree at the Euston Hotel, London. Here Rowntree, together with Eric Geddes of Dunlop Rubber, C. F. Merriam of British Xylonite, and management pioneer Lyndall Urwick, resolved to introduce Dennison’s concept to Britain, resulting in the creation of the large-firm London-based MRG 1.<sup>75</sup> In a lecture delivered in April 1927, Dennison outlined his initiative: “It is that manufacturers, and business men [*sic*] and merchants, too, should get together and exchange, with open minds, and sound analytical judgments, the information and experience which they possess as individuals.”<sup>76</sup>

Dennison’s lecture triggered an enthusiastic, rapid response, such that firms quickly jumped on the bandwagon. MRG 2, intended for firms with workforces of five hundred to two thousand, MRG 3 for companies with fewer than five hundred employees, and MRG 4 for small firms were all established in 1927. By late 1928, seven groups were in existence.<sup>77</sup> Altogether, nine groups were formed (MRG 3 being split into two parts: 3 and 3A).<sup>78</sup> MRGs 2 through 8 were geographically dispersed, with proximity deemed beneficial. MRG 3 served London and the West of England, MRG 3A the West Midlands, and MRG 5 the Northeast, while MRG 6 served Manchester, Liverpool, and Lancashire. The composition of the groups was complicated, dynamic, and prone to fluctuate, with some groups being closed and relocating elsewhere. The turbulent nature of the interwar years saw member firms come and go, as some resigned while others were co-opted, as a result of business failures, acquisitions, or lack of managerial capacity, with managers often becoming involved when they perceived benefit to their companies. The MRGs eschewed uniformity, doubtless to avoid group think, with an ideal size

<sup>74</sup> Rowntree.

<sup>75</sup> Keith Gries, *Sir Eric Geddes: Business and Government in War and Peace* (Manchester, 1989), 133.

<sup>76</sup> Henry S. Dennison, “How Manufacturers Can Co-operate with Each Other to Secure Maximum Efficiency,” *Lecture Conference for Works Directors, Managers, Foremen, Forewomen held at Balliol College, Oxford* (3 Mar.–4 Apr. 1927).

<sup>77</sup> Management Research Groups (hereafter, MRG), *First Annual Report, 1st January–31st December 1927*.

<sup>78</sup> MRG, *Second Annual Report, 1st January–31st December 1928*.

of ten to fifteen firms to enable meaningful exchange. Each group created a variety of subcommittees.<sup>79</sup> The first subgroup, of power plant engineers, was formed in 1928, and by 1929 MRG 1 had as many as nine separate subgroups.

The MRGs were not a repository of knowledge but are best conceived as a gateway to new methods, a means of finding out, an exercise in peer-to-peer collective learning strongly situated in the firm. Site visits to factories and, later, offices typically took place in the morning, commencing with “a general outline of the business, emphasizing two aspects: the features of their management most likely to be of use to others and points upon which help was sought.”<sup>80</sup> This was followed by the visit itself and then discussion in the afternoon. Although their preoccupations were often rather technical in nature, perusal of the documentary record lends a microhistorical perspective that complements the bigger, macro-level picture emanating from the lectures. Their minutes reveal choices made by individual actors unfolding in real time, “on the ground.”<sup>81</sup> The discussions featured a network intensity that served them well. In this sense they represented preliminary communities of practice long before the term was coined, whereby learning is interwoven with daily activities and “essentially social and based on direct contact with other individuals, books, articles or tools.”<sup>82</sup> As Rowntree noted, “I came to learn rather than to teach.”<sup>83</sup> As communities of practice, the MRGs shed light on the circulation of management knowledge in the interwar years.

The directors’ dinners began in 1931, when MRG 1 held dinner discussions with attendance limited to directors and business leaders. Their popularity was such that they were quickly made available to other groups. Normally held at the Waldorf Hotel, London, near the MRG central office, the customary format was for dinner to be followed by a lecture, often by a guest speaker, and discussion. In many ways they became mini versions of the conferences but with little of the discussion being systematically recorded.

### Modernizing British Management

As Matthias Kipping, Daniel Wadhvani, and Marcelo Bucheli observe, historical sources were created to address specific questions

<sup>79</sup> MRG, *Third Annual Report, 1st January–31st December 1929*.

<sup>80</sup> MRG, *Third Annual Report*.

<sup>81</sup> Lamoreaux, “Rethinking Microhistory,” 555.

<sup>82</sup> Jean Lave and Etienne Wenger, *Situated Learning: Legitimate Peripheral Participation* (Cambridge, UK, 1991); Davide Nicolini, Igor Pyrko, Omid Omidvar, and Agness Spannelli, “Understanding Communities of Practice: Taking Stock and Moving Forward,” *Academy of Management Annals* 16 (July 2022): 680–718, 688.

<sup>83</sup> Rowntree, “Training for Industrial Administration.”

devised not by researchers but rather “by actors driven by agendas determined by a context that differs from the one of the researcher.”<sup>84</sup> There is no substitute for the underlying historical methodology that underpins the analysis and interpretation of historical sources, entailing sequencing (constructing a chronological order of events), contextualizing (situating events in their sociohistorical contexts), exploring (establishing causal relations between actors, processes, events, and consequences), and (re)interpreting (uncovering significance by critically evaluating a particular case).<sup>85</sup> The search function of our online repository identifies recurrent words or phrases, yielding insight into the preoccupations of participating managers, which in turn can give rise to analytical categories.<sup>86</sup> Words such as “waste” and “service,” for example, appear frequently. In the last bulletin we collected of MRG 1, from December 1939, “war” features strongly as firms understandably sought to help in the delivery of war allowance schemes and gas-proof air raid shelters.<sup>87</sup>

As we read and analyzed our material, preliminary themes began to emerge, including the importance of practical peer-to-peer learning located in the firm, the facilitation of knowledge transfer, and the nature of industry as a human service mindful of the “human needs of labour.”<sup>88</sup> At the fore, however, was the theme of modernizing management through management education and knowledge exchange. Two further prominent themes concerned, first, the need to organize cooperation through sharing experience and discussing issues together and, second, the impetus to democratize industry, balancing human and business needs by extending a degree of partnership to employees.

We chose to present our analyzed material in a data display table, in the manner recommended by Dennis Gioia, Kevin Corley, and Aimee Hamilton.<sup>89</sup> The “Gioia method” has gained ground recently, becoming almost *de rigueur* in qualitative organization studies, and is now used by

<sup>84</sup> Matthias Kipping, R. Daniel Wadhvani, and Marcelo Bucheli, “Analyzing and Interpreting Historical Sources: A Basic Methodology,” in *Organizations in Time*, eds. Bucheli and Wadhvani 305–29, 313.

<sup>85</sup> Mairi Maclean, Charles Harvey, Tom McGovern, and Gareth Shaw, “Elite Solidarity, Social Responsibility, and the Contested Origins of Britain’s First Business Schools,” *Academy of Management Learning and Education* (advance online publication 25 Feb. 2022), <https://journals.aom.org/doi/10.5465/amle.2021.0229>.

<sup>86</sup> Andrew Smith, Nicholas D. Wong, Anders Ravn Sørensen, Ian Jones, and Diego M. Coraiola, “Historical Narratives and the Defense of Stigmatized Industries,” *Journal of Management Inquiry* (Oct. 2022): 386–404.

<sup>87</sup> MRG 1, Bulletin, 18 Dec. 1939.

<sup>88</sup> B. Seebohm Rowntree, *The Human Needs of Labour* (London, 1918); *Industrial Unrest: A Way Out* (London, 1922).

<sup>89</sup> Dennis A. Gioia, Kevin G. Corley, and Aimee L. Hamilton, “Seeking Qualitative Rigor in Inductive Research: Notes on the Gioia Methodology,” *Organizational Research Methods* 16 (Jan. 2013): 15–31.

some business historians.<sup>90</sup> The method entails thematic analysis, representing a content analysis technique that picks up on the themes that feature most prominently in the data. The aim is to fashion a hierarchical code tree that builds up constructs step-by-step through a process of gradual abstraction from the source data. Data display tables encapsulate the essence of empirical material while explicating how illustrative quotations generate subthemes or second-order categories, which in turn generate overarching aggregate themes (see Table 1). As such, the Gioia method is representative of the contents of any given body of data and the steps taken to analyze it. It more readily makes its claims and themes explicit, in a format more easily understood in organization studies and in the social sciences more broadly. Hence, it does not displace a narrative approach, such as is deployed elsewhere in our article, but enriches and complements it; the connections between the primary source material and the findings require the interpretive act of the historian to make them legible.

*Modernizing management.* The need to modernize management was summarized by Rowntree in his lecture of March 1920, when he outlined the challenges facing industry: “The state of things, of course, was always bad, but before the war it was more or less possible to tolerate it. We cannot tolerate it today. We cannot afford to do so.”<sup>91</sup> Dennison agreed, urging “all the really progressive employers in Great Britain” to get together and leave their “jealousies and rivalries outside the door”; he argued in his 1927 address, “The only thing that is worthwhile for us as employers is to find out whatever in our enterprise is not so good as it ought to be, and then to make it better.”<sup>92</sup>

To modernize management, participant managers were keen to make “authoritative statements on management subjects.”<sup>93</sup> There was an important self-help aspect to this, one of participants working things out for themselves while formulating definitions of management terms that may also benefit others.<sup>94</sup> To this end a British Terminology Committee was established, such that by 1931, a “large number of definitions [had] been collected by members of the Committee and [had] been sent to authorities in the various fields of management for criticism and modification.”<sup>95</sup>

<sup>90</sup> See Smith et al., “Historical Narratives,” 7, 8; Maclean, Harvey, and Suddaby, “Institutional Biography,” 10.

<sup>91</sup> Rowntree, “Training for Industrial Administration.” See also William Wallace, “A Review of the Industrial Situation in Britain, with Suggestions for Meeting Present Difficulties,” *Lecture Conference for Works Director, Managers, Foremen, Forewomen held at Balliol College, Oxford* (25–29 Sept. 1930).

<sup>92</sup> Dennison, “How Manufacturers Can Co-operate.”

<sup>93</sup> MRG, *Fourth Annual Report, 1st January–31st December 1930*.

<sup>94</sup> MRG, *Fifth Annual Report, 1st January–31st December 1931*.

<sup>95</sup> MRG, *Fifth Annual Report*.

*Table 1*  
Data, Categories, and Aggregate Themes

<i>Illustrative first-order quotations</i>	<i>Second-order categories</i>	<i>Aggregate themes</i>
<ul style="list-style-type: none"> <li>• “The loss of potential wealth due to bad administrative methods is tremendous.”<sup>a</sup></li> <li>• “Two general meetings of all Groups were held . . . to promote the study, development and practical application . . . of the science of business management.”<sup>b</sup></li> </ul>	Educating managers	Modernizing management
<ul style="list-style-type: none"> <li>• “There should be a flow of new ideas and new knowledge . . . to enable existing industries to be run more effectively and to result in the foundation of new industries.”<sup>c</sup></li> <li>• “Management Research Groups had been founded in 1926 and were doing a quite remarkable job of getting managers together to discuss their problems.”<sup>d</sup></li> </ul>	Exchanging knowledge	
<ul style="list-style-type: none"> <li>• “Those firms . . . have not advanced so far as they could have done if they had pooled their isolated experiences.”<sup>e</sup></li> <li>• “We have reaped considerable benefit from the intercourse afforded by the Group.”<sup>f</sup></li> </ul>	Sharing experience	Organizing cooperation
<ul style="list-style-type: none"> <li>• “The point of view of the expert . . . will not accomplish much unless we ourselves have leisure and opportunity for talk and discussing together.”<sup>g</sup></li> <li>• “In the first year or two, we all forgot to keep things to ourselves; we got excited in talking matters over!”<sup>e</sup></li> </ul>	Discussing together	

- “A completely new conception of the position and outlook of labour is permeating the mind of the whole nation.”<sup>h</sup>
- “If we desire to secure something so valuable as real industrial peace, we must be prepared to pay for it.”<sup>i</sup>
- “No section of men during the past 4 years has rendered greater service and received less consideration than [foremen].”<sup>j</sup>
- “The most pressing claim of the workman at the present time is . . . for partnership in industry.”<sup>k</sup>

Reconceiving labor

*Democratizing  
industry*

Extending  
partnership

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<sup>a</sup>B. Seebohm Rowntree, “Training for Industrial Administration,” *Lecture Conference for Works Directors, Managers, Foremen, Forewomen, Durham* (19–22 Mar. 1920), 8.

<sup>b</sup>MRG, *Third Annual Report, 1st January–31st December 1929*, 6.

<sup>c</sup>William Wallace, “A Review of the Industrial Situation in Britain, with Suggestions for Meeting Present Difficulties,” *Lecture Conference for Works Director, Managers, Foremen, Forewomen held at Balliol College, Oxford* (25–29 Sep. 1930), 15.

<sup>d</sup>Harry Ward, personal interview by Shirley Keeble, 1979, see Harry Ward collection, tape 1, page 3, The Rowntree Business Lectures and the Interwar British Management Movement, accessed 8 Dec. 2022, <https://rowntree.exeter.ac.uk/>.

<sup>e</sup>Henry S. Dennison, “How Manufacturers Can Co-operate with Each Other to Secure Maximum Efficiency,” *Lecture Conference for Works Directors, Managers, Foremen, Forewomen held at Balliol College, Oxford* (3 Mar.–4 Apr. 1927), 9.

<sup>f</sup>MRG, *First Annual Report, 1st January–31st December 1927*, 16.

<sup>g</sup>Alexander Dunlop Lindsay, “Concluding Lecture,” *Lecture Conference for Works Directors, Managers, Foremen, Forewomen held at Balliol College, Oxford* (16–20 Apr. 1925), 37.

<sup>h</sup>J. N. Mercer, “Oversight from the Workers’ Standpoint,” *Report of Lectures given at the Lecture School for Works Managers, Foremen, Forewomen* (24–28 Apr. 1919), 12.

<sup>i</sup>B. Seebohm Rowntree, *Industrial Unrest: A Way Out* (London, 1922), 11.

<sup>j</sup>Dempster Smith, “The Functions of Works Managers and Foremen in the Past and in the Future,” *Report of Lectures given at the Lecture School for Works Managers, Foremen, Forewomen at the Manor Hotel, Scarborough* (24–28 Apr. 1919), 3.

<sup>k</sup>Sydney Webb LLB, “The New Spirit in Industry,” *Lecture Conference for Works Directors, Managers, Foremen, Forewomen held at Balliol College, Oxford* (15–19 Apr. 1920), 9.

Testimonials from member firms attest to the value they derived from meetings and discussions. A manager representing Arthur H. Lee & Sons Ltd. from Birkenhead made this point: “While we have received valuable help on many points through our contact with other group members . . . I feel that the stimulus of discussion and friendly criticism is still more valuable.”<sup>96</sup> The movement was not simply a “talking shop” concerned with definitions. As J. A. Crabtree of Crabtree & Co. Ltd., Walsall, expressed it, “the work of the Group does not finish at the meetings. Those only mark its commencement.”<sup>97</sup> In this regard, Ward provides a salient example of the concrete measures emerging from the movement’s activities. Here, he describes a meeting of MRG 1 in 1940, when the introduction of PAYE (Pay as You Earn), a new way of deducting income tax directly from salaries, was first broached:

This was a remarkable meeting of great historic importance. Chambers [secretary of the Inland Revenue] wanted to be quite assured that he was on the right lines and that his proposal would be acceptable to industry before the announcement was made public. . . . No Inspector of Taxes had, of course, heard anything about the PAYE proposals, consequently those attending our meeting in September 1940 were able to tell their local tax inspectors what was coming to them, and this increased their standing with the Tax Inspector. . . . [This] was one of the very remarkable meetings held by Management Research Group No 1.<sup>98</sup>

*Organizing cooperation.* The principle of coming together to discuss vital issues from differing viewpoints was fundamental to the movement. As Lindsay, Master of Balliol, expressed it, “we arrive at truth most readily by rubbing together in friendly question and answer.”<sup>99</sup> Seed funding provided by Rowntree in 1926 to kickstart the MRGs—when “the Joseph Rowntree Social Service Trust placed £500 at the disposal of the Hon. Secretary for development purposes . . . to furnish and equip the central office when this opened”—were indicative of this “new spirit [for] partnership in industry” that infused the movement.<sup>100</sup> There was a strong proselytizing element to this, as the MRG annual report for 1931 made clear: “if the idea of co-operation in the discussion and solution of management problems by manufacturers, and the exchange of information on management matters, is valuable, we

<sup>96</sup> MRG, *First Annual Report*.

<sup>97</sup> MRG, *First Annual Report*.

<sup>98</sup> Ward, interview.

<sup>99</sup> Lindsay, “Concluding Lecture.”

<sup>100</sup> MRG, *First Annual Report*; Sydney Webb LLB, “The New Spirit in Industry,” *Lecture Conference for Works Directors, Managers, Foremen, Forewomen held at Balliol College, Oxford* (15–19 Apr. 1920).

want to see the advantages shared by an ever widening circle of British industrialists.”<sup>101</sup>

Accompanying this “combinatorial logic,” members displayed remarkable methodological openness, with the annual report for 1935 commenting, “The readiness of members to show their methods, equipment etc. to each other is a tremendous asset, for demonstration is always more illuminating than description.”<sup>102</sup> Collaborative networks served as channels for the exchange of new approaches.<sup>103</sup> The effect was to build a “community of interests,” sweeping aside customary barriers between firms: “The boundaries of Groups have been broken down when discussing certain aspects of organisation common to all or most companies.”<sup>104</sup> The Rowntree and MRG material thus provides a sense of individual members being embedded in wider affiliations of firms. This extended even to the sharing of confidential information, as one MRG bulletin explained: “As the result of a suggestion made by Mr G. B. Williamson, Chief Engineer of the Dunlop Rubber Co. Ltd., a number of Companies have forwarded confidential data which may lead to some basis of overall comparison of maintenance costs amongst different Companies.”<sup>105</sup>

Research undertaken by the groups was not always successful. Yet even when things did not proceed as planned, there is evidence that members found such exercises beneficial, because they illuminated practices requiring improvement. An investigation into indirect factory labor costs, entailing a full examination of figures supplied by member firms, was curtailed when its results were felt to be insufficiently valuable to warrant continuation. As the 1931 annual report clarifies, “The Committee, however, were unanimously of the opinion that although the enquiry was barren of result, the investigation necessary to compile the figures required had brought to light many practices which could be improved, and which, without the enquiry, would have remained hidden.”<sup>106</sup>

What is noticeable in studying the MRG documentation is the degree of cross-fertilization apparent between members, with some members attending meetings arranged for other groups. Key participants emerge as boundary spanners. Ward himself interacted with pivotal actors from the worlds of business and politics, observing that while residing at the Reform Club in London, “each morning I was joined

<sup>101</sup> MRG, *Fifth Annual Report*.

<sup>102</sup> Ventresca and Mohr, “Archival Research Methods,” 813; MRG, *Ninth Annual Report, 1st January–31st December 1935*.

<sup>103</sup> Child and Smith, “Context and Process,” 571.

<sup>104</sup> MRG, *Sixth Annual Report, 1st January–31st December 1932*; MRG, *Ninth Annual Report*.

<sup>105</sup> MRG, *Management Research Groups Bulletin* 22 (Nov. 1935).

<sup>106</sup> MRG, *Fifth Annual Report*.

[for breakfast] by five or six managing directors and chairmen of our largest companies, so I was kept in the closest touch with industrial thinking.”<sup>107</sup> The minutes of the MRG annual general meeting for 1937 refer to the “many members who had collated and duplicated information for the benefit of members as a whole, and who had invited members to use their premises for meetings,” attesting to the “very real cooperation amongst Group Members.”<sup>108</sup>

*Democratizing industry.* The interwar years were a time when the democratic responsibilities of employers were being hotly debated. Some lecturers argued that the principle of partnership facilitated by organized cooperation could quell worker unrest and promote greater industrial democracy. As Sydney Webb insisted in 1920, “it is by the combination of the conception of partnership among all those concerned in each enterprise . . . that we can safely make the transition from Autocracy to Democracy, which alone will allay Labour Unrest.”<sup>109</sup> Including foremen and forewomen at conferences was critical, Dempster Smith alleged, no section of the population “during the past four years [having] rendered greater service and received less consideration than they.”<sup>110</sup> Hence, working together was a vital means of democratizing the industrial system, as the Master of Balliol College asserted: “the industrial democracy of the future will be most speedily and most securely established when men who are inspired by the democratic ideals of the abstract theorist . . . really work in unison with those men who devote themselves to the concrete working out of the countless problems of management and of cooperation that modern industry presents.”<sup>111</sup>

The management movement was not all about power and privilege. From the beginning, dissenting voices were admitted to the conferences, since managers needed to hear workers’ views. The movement was born in crisis avoidance and addressing worker unrest was fundamental to its mission. Yet, as J. N. Mercer argued at the inaugural conference of April 1919, the roots of industrial unrest ran deep: “We all know that Labour Unrest is not merely a war-time phenomenon. Its causes lie deeper, and will not be removed unless there is a radical change in the organisation of industry.”<sup>112</sup>

<sup>107</sup> Ward, interview.

<sup>108</sup> MRG, *Management Research Groups Annual General Meeting* (Feb. 1937).

<sup>109</sup> Webb, “New Spirit.”

<sup>110</sup> Dempster Smith, “The Functions of Works Managers and Foremen in the Past and in the Future,” *Report of Lectures given at the Lecture School for Works Managers, Foremen, Forewomen at the Manor Hotel, Scarborough* (24–28 Apr. 1919).

<sup>111</sup> Lindsay, “Concluding Lecture.”

<sup>112</sup> J. N. Mercer, “Oversight from the Workers’ Standpoint,” *Report of Lectures given at the Lecture School for Works Managers, Foremen, Forewomen* (24–28 Apr. 1919).

There is evidence that some progressive employers involved in the movement did not always practice what they preached. Rowntree served as labor director in the family firm, yet some of his own employees did not earn what he himself specified as a living minimum wage.<sup>113</sup> Documents collected from the Borthwick Institute reveal that labor standards at the Cocoa Works factory in York were sometimes found wanting. For example, although conference speakers condemned “blind-alley employment,” alluding to the practice of letting boys go once they reached adulthood, this was commonplace at the Rowntree factory.<sup>114</sup> There is also a question mark over the treatment of women workers. One undated letter signed by E. Brown of the Packing Room identifies a so-called Gestapo Room as one reason why women workers reputedly tended not to stay long at Rowntree’s. The letter reads, “on the fifth floor, known as the Gestapo Room, the one thing that is omitted from that room is the whip, to be given to Teachers Rose Grady and Joyce Lancaster. . . . [I]f a bit more tact and politeness were used by Personnel, the workers would stay.”<sup>115</sup>

This brief allusion to the questionable treatment of women workers is left rather vague and unclear in the documentary record, exemplifying Schwarzkopf’s point that archives allow things to be seen only partially. Radical change to the organization of industry, however, was not necessarily what employers wanted, having profited from the *status quo*. As Friedman and Jones argue, the “relationship between business and democracy is contentious.”<sup>116</sup> Yet improving industrial democracy made sound business sense, since it might defuse industrial unrest enough to avoid engendering the conditions under which unionism and socialism might thrive, keeping the threat of state intervention and nationalization at bay.<sup>117</sup>

<sup>113</sup> Rowntree, *Human Needs*, 11. On the macro context of interwar Britain and demands for industrial democracy, see Lauck, *Political and Industrial Democracy*, 130–48; Marwick, *Deluge*. Regarding the contradictions between management practitioners’ theory and practice, see Mairi Maclean, Gareth Shaw, and Charles Harvey, “Business as Service? Human Relations and the British Interwar Management Movement,” *Human Relations* 75 (Aug. 2022): 1585–1614.

<sup>114</sup> Lord Eustace Percy, “Primary Purpose of Business Management: A Cabinet Minister’s View,” *British Management Review* 1 (1936): 135–44, 137–8; Cocoa Works, *Labour Policy and Practice* (1935), sec. III (“Employment”).

<sup>115</sup> Undated letter from E. Brown, Packing Room, Rowntree’s, York. [Available at Borthwick Institute for Archives.]

<sup>116</sup> Friedman and Jones, “Time for Debate,” 7.

<sup>117</sup> John S. Hassard, “Rethinking the Hawthorne Studies: The Western Electric Research in Its Social, Political and Historical Context,” *Human Relations* 65 (Nov. 2012): 1431–61; Andrew Perchard and Keith Gildart, “Managerial Ideology and Identity in the Nationalised British Coal Industry,” *Economic and Industrial Democracy* (advance online publication 3 Feb. 2022), <https://doi.org/10.1177/0143831X211069413>.

## Discussion and Conclusion

In this study of the British interwar management movement, we have attempted to pass on an experience to other scholars and interested parties by making our project material available through a public-facing free-to-use website, surmising that other researchers will use it if they know it is there. We have also sought to help preserve this material for posterity, believing that if it were not assembled and captured, it might be lost. As Ward expressed it, “These records are very important and of course cannot be replaced and give an idea of how Management Research worked and the very close touch with the companies who were members.”<sup>118</sup> Archival materials can provide partial or conflicting evidence from which to derive an interpretation, triggering different insights about the nature and development of organizational events and processes. Method and theory development are intertwined in the crafting of an analytical narrative. While creating digital archives is a crucial step, we recognize that this makes the interpretive work of the historian, in sifting through the masses of data, even more important. The historian’s own analytical lens understandably affects his or her interpretation of the material under scrutiny. Our main contribution in this article is thus to show that interpretations themselves can become embedded and prone to inertia over time, inviting us to revisit these periodically and, if appropriate, to recast them.

We show that the British interwar management movement was characterized by organized cooperation and a methodological openness that we have sought to emulate in our own project. We demonstrate that it displayed greater interest in new management ideas and methods, and a greater willingness to share these with others, than the received critical view of British interwar management implies. When challenging a settled narrative, sharing project data can be helpful, especially if this provides a solid empirical basis for a new interpretation. Transparency of process is attracting increasing attention in business historical research.<sup>119</sup> By making our data freely available, providing a research resource that other scholars can consult, they may form their own views about the dynamism of British management during the interwar years.

The dynamic relational networks that our material illuminates help to map managerial horizons in interwar Britain. These reveal actors connected in overlapping circles of cooperation and knowledge exchange. They emerge as more forward looking and ambitious than commonly

<sup>118</sup> Ward, interview.

<sup>119</sup> Lipartito, “Historical Sources,” 303.

assumed, displaying a deep concern for planning, forecasting, and the projection of a long-term view. They engage more actively with new techniques and currents of thought than is traditionally supposed, exemplifying “the channels for a new outlook to infuse into the mainstream of organizational awareness.”<sup>120</sup> Action, as Raff points out, is “deeply historicized,” inspiring us through archival research to “uncover that history.”<sup>121</sup> Historical perspective requires that scholars situate actors and their sources in the relevant context, “with interests, identities, mentality, and actions shaped by their place in historical time.”<sup>122</sup> Our study of the interwar management movement puts firms and actors back into the historical context in which they were operating. The micro-level perspective offered by the MRGs is complemented by the macro-level context afforded by the lecture material, providing fine-grained detail and the broader sweep of events and enabling us to capture the “inside and outside” of our story.<sup>123</sup> The lectures and MRGs attracted their peak attendance in times of difficulty, with MRG membership reaching 121 firms in 1931 when Britain was mired in recession. The MRGs provided a gateway service, sending out life rafts to firms in need of assistance. Capitalism is singularly evolutionary in character, and the reporting of discussions at meetings and lectures reveals the unfolding of choices almost in real time.<sup>124</sup> Studying the records of the MRGs, lectures, and dinners provides glimpses of an evolving continual reality playing out over the interwar period. History is sometimes criticized for an in-built bias toward survivorship. At a time when many firms went bust, perusal of these records can shed light on some of those that fell by the wayside.

The novelty of the Rowntree conferences in being open to different organizational levels meant that, for once, managers were exposed to the contrasting perspectives of workers, foremen, and forewomen at a time when they needed to hear their thoughts. Delegates such as J. N. Mercer and Jimmy Mallon actively represent the workers’ viewpoint.<sup>125</sup> Some of the most interesting parts of these conferences occur in the ensuing discussions, when contrasting views are voiced from the floor and the opinions of delegates who did not give speeches are heard. In one discussion in 1921, Mr. G. Warren, secretary of a works committee in Sheffield, explains his views on cooperation between workers and

<sup>120</sup> Child and Smith, “Context and Process,” 586.

<sup>121</sup> Raff, “How to Do Things with Time,” 452.

<sup>122</sup> Kipping, Wadhvani, and Bucheli, “Analyzing and Interpreting,” 320.

<sup>123</sup> Lamoreaux, “Rethinking Microhistory,” 588.

<sup>124</sup> O’Sullivan and Graham, “Guest Editors’ Introduction,” 778.

<sup>125</sup> Mercer, “Oversight from the Workers’ Standpoint;” J. J. Mallon, “Industrial Peace,” *Lecture Conference for Works Director, Managers, Foremen, Forewomen held at Balliol College, Oxford* (10–13 Apr. 1924).

managers: “Two years ago . . . when the management asked the workers for anything, they hung back as if they were going to be burnt. When the workers made a proposal, the management did likewise. But eventually we all realised we must come to an understanding. . . . If there is suspicion in the shops . . . I hope employers will thrash out the whole matter with the workers, man to man [sic].”<sup>126</sup>

Alongside faithfulness to the original document, an important principle in conducting our study was our desire to give those involved the credit they are due, acknowledging many of those “whose names will never appear publicly anywhere else,” as Ward put it.<sup>127</sup> Some individuals and events are unfairly overlooked in history.<sup>128</sup> To recover them from the oubliettes of history requires the motivation and perseverance to do so, through painstaking archival research.<sup>129</sup> The recordings of interviews with Ward, which we transcribed and digitized, bear witness and give voice to a past that has been relatively neglected and critiqued. In these audio files, Ward reflects in 1979 on the prior organizational world of the 1920s and 1930s, bringing it to life for the listener in a form of “living history.”<sup>130</sup>

A fundamental question regarding our project material concerns the extent to which firms that attended the lectures and meetings implemented what they learned, and whether they were doing better than non-participating firms. This forms a limitation of our current study and represents an avenue for further research. Some illustrations are nevertheless warranted. Lever Brothers Ltd. claimed to welcome “the facilities offered by the Group to exchange data and experience with large concerns in other trades. We regard this as a safeguard against the danger of allowing our methods to become rigid or stereotyped.” The Bradford Dyers’ Association Ltd. added that “we are satisfied that the information made available to us through our membership of the Group and the facilities it has afforded for comparing our practice and sharing knowledge with other large firms has justified our initial hopes.”<sup>131</sup>

Exploration of the British management movement reveals the unexpected methodological openness and interconnectivity of interwar business life, demonstrating that managers participating in the movement

<sup>126</sup> *Lecture Conference for Works Director, Managers, Foremen, Forewomen held at York* (11–13 Feb. 1921).

<sup>127</sup> Ward, interview.

<sup>128</sup> Taylor, Bell, and Cooke, “Business History,” 164.

<sup>129</sup> Michael Weatherburn, “*Human Relations’* Invented Traditions: Sociotechnical Research and Worker Motivation at the Interwar Rowntree Cocoa Works,” *Human Relations* 73 (July 2021): 899–923.

<sup>130</sup> Bucheli, Mahoney, and Vaaler, “Chandler’s Living History.”

<sup>131</sup> MRG, “Some Members’ Testimony to the Practical Utility of the Management Research Group Idea” (1938).

were willing to share their knowledge and experience with others. Our study highlights the circulation of business knowledge in interwar Britain and uncovers changing repertoires of action across a range of events, businesses, and actors. In so doing, it invites us to reconsider the received critical view of British management in the years between the wars.

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