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In the midst of the Great Depression,

a Chicago businessman stares bankruptcy in the face. Behind on payments, creditors knocking on the door, he knows that the fate of his 250 employees and their families rests on his shoulders, and he's running out of time, answers, and cash. Business and the economy aren't going

to be improving, so he turns to his Christian faith for guidance and comes up with 24 words, which he hopes will change the future of his company. He runs these words, his "test," past co-workers of different religions to make sure they don't contradict their faiths. The company adopts this ethical test as an official policy for conducting business. Within a few years, all debts are paid off, and the Club Aluminum Products Company is paying stockholders huge dividends. The application of The Four-Way Test helped Club Aluminum win the friendship and goodwill of its customers and vendors, and proved essential to the businessman's success.

An active Rotarian beginning in the early 1920s, Herbert J. Taylor


brought his test to the Rotary Club of Chicago. Years later, it was officially adopted by Rotary International and became part of the organization's vocational service ideals.

In his story "Is It the Truth?" (page 46), Paul Engleman looks back on the origins of The Four-Way Test and interviews Taylor's daughter Ramona, his grandson, and other family members for their personal recollections.

For decades, The Four-Way Test has been used around the world in schools and businesses as an effective way to measure ethical conduct and develop respect and understanding among people. Rotary clubs have sponsored essay contests and enlisted the assistance of other civic organizations to

introduce the test into their communities. But perhaps more than anything else, the ethical standard represented by the test is the single most important link from Rotarian to Rotarian. Whether you're American or Japanese, age 30 or 80, the club president or a newly inducted member, it underscores our commitment to business and personal integrity.

"We have found that you cannot constantly apply The Four-Way Test to all your relations with others eight hours each day in business without getting into the habit of doing it in your home, social and community life," wrote Taylor during his year as RI president, 1954-55. "You thus become a better father, a better friend, and a better citizen."



Vince Aversano
Editor in chief

The story of how Herbert J. Taylor
survived the Depression and went on
to make the world a better place

IS IT THE TRUTH?

BY PAUL ENGLEMAN

IT IS A STORY SO FAMILIAR TO MOST ROTARIANS that it has evolved beyond lore and become assimilated into the genetic code of the organization. In 1932, Herbert J. Taylor, the newly appointed president of a nearly bankrupt Chicago cookware company, believing his employees were in need of an "ethical yardstick," wrote four questions on a small white piece of paper:

Is it the TRUTH? Is it FAIR to all concerned? Will it build GOODWILL and BETTER FRIENDSHIPS? Will it be BENEFICIAL to all concerned?

When Taylor penned what came to be known as The Four-Way Test, the country was in the grip of the Great Depression, and there was widespread distrust of banks and corporations after the stock market crash



three years earlier. At the Club Aluminum Products Company, a new and expensive type of cookware was being sold with rapidly declining success by door-to-door salesmen using high-pressure tactics. Although Taylor instituted additional measures, such as establishing distribution channels through retail stores and offering free trials and affordable payment plans, he came to believe that applying his test to Club's advertising and sales methods was the key factor that led to the company's remarkable return to profitability.

Before implementing the test as a company policy, Taylor consulted four managers – a Roman Catholic, a Christian Scientist, an Orthodox Jew, and a Presbyterian – to make sure nothing in it conflicted with "their religious or moral beliefs." He came to see the test as useful beyond business, writing in his autobiography, "Anyone who checks his thoughts, his words and deeds against The Four-Way Test before he expresses himself or takes action is almost certain to do the right thing."

In the 54 years since Taylor graced the cover of *Newsweek* magazine as president of Rotary International during its 50th anniversary year, The Four-Way Test has stayed front and center in Rotary circles, with many club members reciting it before meetings and applying it to personal and professional challenges. But in the midst of another economic crisis and a period marked by corporate greed and scandal, this seems an appropriate time to renew acquaintances with one of the key figures in the history of Rotary.

Perhaps the most important thing to understand about Herbert Taylor is that while he worked hard to promote The Four-Way Test – primarily through Rotary, but also through speaking engagements, radio broadcasts, and youth organizations – he did not claim credit for its authorship. Taylor was a deeply religious man who believed the test came to him through prayer. He believed that "God has a plan

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for all of us" and that his willingness to accept that idea led to the positive accomplishments of his life, including his association with Rotary. He viewed Rotary as "a maker of friendships, a builder of men and communities and a creator of goodwill and friendship between the peoples of the world."

Taylor's association with Rotary began in the early 1920s, when he helped organize a club in Pauls Valley, Okla., where he had moved from Chicago with his young wife, Gloria Forbrich, after serving in World War I as a naval officer and, before that, a YMCA volunteer in France. Born in 1893, he grew up in Pickford, Mich., a town of 300 in the Upper Peninsula. His father pretty much ran the town, starting up the telephone and electric companies while operating a bank, a lumber supply company, and a dairy, so Taylor was comfortable with small-town life and commerce. He also was willing to work hard, as he had shown while he was a student at Northwestern University. There Taylor had four

jobs: selling typewriters, selling ad space for the yearbook, working for a telegraph company, and writing sports stories for two Chicago newspapers. (He would use the telegraph to wire his stories before the regular reporters turned theirs in.)

In Oklahoma, Taylor sold insurance and brokered oil leases. One of his most memorable sales came about when he attempted to purchase an oil lease from a farmer who, moments earlier, had been served with divorce papers by the local sheriff. Taylor drove the man to a neighboring farm where his wife and children were staying and sold the couple on the idea of marital reconciliation while getting both of their signatures on a lease agreement.

After five years in Oklahoma, the Taylors returned to Gloria's hometown, Chicago, where he joined the local Rotary club and took an executive post with the Jewel Tea Company. By 1928, he was a vice president of the company and the father of two daughters, Beverly and Ramona.

In the early 1930s, around the time Taylor was giving up his steady position at Jewel to save Club Aluminum, he and Gloria set up a storefront mission with a bread line and soup kitchen that drew hundreds of people. That led to the establishment of the Christian Workers Foundation, one of several youth organizations to which Taylor devoted his time. In 1939, he became president of the Rotary Club of Chicago and later held the posts of district governor and director before becoming a vice president of Rotary International in 1945.

In 1941, with the nation gearing up for World War II, the government curtailed all domestic aluminum use, effectively shutting down Club Aluminum except for selling off existing inventory. Taylor launched a new product, flameproof glass coffee makers, and hired Japanese workers, whose national loyalty was being called into question. Taylor himself was called to Washington, D.C., to serve as one of the nation's "dollar-a-year" men – business executives who worked for the government to help drive the economy. He became vice chairman of the War Department's



Photos from Herbert Taylor's life: 1) In 1916, at Northwestern University; 2) Herbert and Gloria (sitting) with daughters Ramona and Beverly; 3) The cover of *Newsweek* in 1955; 4) June 1919, Herbert and Gloria marry; 5) Rotary's golden anniversary, the Taylors with Ramona, Beverly, and their husbands; 6) Herbert with a copy of *The Four-Way Test*; 7) Pickford, Mich., Herbert and Gloria at his birthplace; 8) The cover of *Guideposts* magazine in 1955; 9) The family gathered on Herbert and Gloria's 30th wedding anniversary.

A BRIEF HISTORY OF THE GOLDEN RULE

Before Herbert Taylor, there was only The One-Way Test

C. 1440 BC

"Thou shalt not avenge
nor bear any grudge
against the children of
thy people, but you shall love
thy neighbor as thyself:
I am the LORD."

Leviticus 19:18

551-479

"What you do
not wish for yourself,
do not do to others."

Confucius

485-405

"Hurt not others
in ways that you yourself
would find hurtful."

Buddha (Udanavarga 5:18)

470-399

"Do not do to others
that which would anger you
if others did it to you."

Socrates

C. 427-347

"May I do to others
as I would that they
should do unto me."

Plato

384-322

"We should behave to
others as we wish others
to behave to us."

Aristotle

AD 5-30

"Therefore all things
whatsoever ye would that men
should do to you, do ye
even so to them: for this is the
law of the prophets."

Matthew 7:12

100

"What you would avoid
suffering yourself, seek not
to impose on others."

Epictetus

570-632

"None of you will have faith
until one desires for his brother
what he desires for himself."

Muhammad

1724-1804

"Act as if the maxim of thy
action were to become by thy will
a universal law of nature."

Immanuel Kant

1817-1882

"Absolutely speaking,
Do unto others as you would that
they should do unto you is by
no means a golden rule,
but the best of current silver.
An honest man would have but
little occasion for it. It is golden
not to have any rule at all."

Henry David Thoreau

1856-1959

"Do not do unto others
as you would that they
should do unto you. Their
tastes may not be the same."

George Bernard Shaw

Price Adjustment Board, a group that had no actual authority but could appeal to the patriotism of manufacturers to not overcharge the government. He resigned in 1943 over differences in certain "principles and policies," but not before delivering an address to manufacturers in which he said his group had uncovered about \$2.8 billion in "excessive profits." A "fair profit," Taylor told the audience, was "that profit which the contractor would be willing to announce to the men who have left his plant and are serving in the armed forces."

Around the time Taylor was lecturing manufacturers about ethics, an RI Board member asked for, and received, his permission for Rotary to use The Four-Way Test to promote high ethical standards. That, Taylor writes in his autobiography, was when "things really started to happen." By 1954, when he became RI president and formally presented the organization with the copyright of the 24 words, the test was already in wide use around the world. On the occasion of Rotary's golden anniversary, the test traveled with the Taylors as they promoted goodwill and friendship in 38 countries and earned plaudits from *Newsweek*, which saluted the organization for having "broken through the barriers of race, religion and language as government and church have seldom been able to do."

A model of self-discipline who abstained from alcohol, wore a suit and tie even while at home, and memorized the Sermon on the Mount and recited it to himself daily, Herbert Taylor was, nonetheless, "not an intimidating guy." So says G. Robert Lockhart, 82, an active member of the Rotary Club of Wolfeboro, N.H., nearly 60 years after his father-in-law recruited him for the organization.

Lockhart recalls that when he made clear his intentions to marry Taylor's daughter Ramona, "he made no big demands about my vocational ambitions. He had a very friendly outlook. He treated everybody that way. I loved the man. I couldn't have had a greater father-in-law."

"He was always optimistic," says Ramona of her father. "I can't remember him being pessimistic about anything. He never raised his voice. He had a gentle spirit."

She recalls that although he suffered from chronic headaches, a result of a rare disease called brucellosis, or undulant fever, he rarely complained. Even after losing his ability to speak after a stroke in 1975, she says, he remained cheerful during the final three years of his life. During that time, he was cared for by his wife, who lived to be 100. In her parents' heyday in Rotary, Ramona says, Gloria was affectionately known as "Herb's costume jewelry." In 1999 at her birthday celebration, she received Paul Harris Fellow Recognition.

Ramona and her sister, Beverly, heard about The Four-Way Test all the time. "He talked about it to the point where, when he told us we had to do something, we would ask, 'Is it fair to all concerned?' We were always teasing him about it."

Ramona's nephew, Allen Mathis III, lived near his grandfather in Park Ridge, Ill., and spent considerable time with him growing up. "He was soft-spoken and had a quiet manner," he recalls. "To me, he wasn't a take-charge type of person. He was very low-key. When I learned about all that he had accomplished, I was surprised."

Now living in Alabama, Mathis, a member of the Rotary Club of Sylacauga, considers Taylor the greatest influence on his life and regularly speaks to groups about The Four-Way Test. Along with his sister, Caryl Cusick, a former Rotarian in Florida, Mathis manages The Four-Way Test Association, a nonprofit organization established by their grandfather in 1959. While they work alongside Rotary to preserve and promote the test, crafted nearly 80 years ago, Ramona points out that it is not her father's only legacy.

"Club Aluminum," she says. "I've been cooking in it for years now. It was advertised that it would last a lifetime — it has for us." ■

Paul Engleman is a freelance writer based in Chicago.

TESTING, ONE, TWO, THREE

Honoring business leaders who live The Four-Way Test

Businesses that ignore the principles outlined in The Four-Way Test don't have much trouble getting noticed. Cook the books, set up a shady Ponzi scheme, or get caught cheating on your taxes, and you're front-page news. But what about companies that abide by the test, quietly practicing truthfulness, fairness, and goodwill every day?

Ethics awards can help even the score. Presented by Rotary clubs and districts, sometimes in cooperation with local business schools or other like-minded organizations, the awards recognize professionals who adhere to high ethical standards in their businesses and communities. They also shine a light on Rotary's litmus test for ethical conduct.

Rotary clubs in Tallahassee, Fla., USA, which have given out a joint award for nine years, saw interest soar in 2009. A record 15 business owners were nominated by Rotarians and others in the community. "When you see so much publicity about businesses that aren't being ethical, people are anxious to see something positive — to know that there are businesses that are doing it right and being successful at the same time," says Michael Forsthoefel, a member of the Rotary Club of Tallahassee who cochaired the Ethics in Business Award committee for his club and seven others.

Club membership is not a requirement for winning, but making a profit is (except for nominees who run philanthropies). The main criterion on the Tallahassee award nomination form: "Adheres to the high ethical standards of honesty, integrity, and consistency in dealing with employees, contractors, and customers, while positively enhancing the well-being of the firm's stakeholders, providing jobs, opportunity, and profits." Nominees also must benefit the community, serve as a business leader or innovator, and adhere to The Four-Way Test.

"When people see a successful business that uses The Four-Way Test, they may look at their own business practices and ask, 'What can I do to be more like this?'" Forsthoefel says.

The 2009 award went to Bill Rutherford, the CEO of the architectural firm Clemons, Rutherford & Associates. Students from the Florida State University College of Business research the nominees, and Rotarians serve as judges. The award ceremony, held at the Tallahassee civic center, features a keynote speaker such as former U.S. Senator Bob Graham and former Florida Governor Bob Martinez.

The nominees honored at the 2009 event included an accountant who discovered and handled an embezzlement case and a podiatrist who routinely provides uncompensated emergency and follow-up care for patients who can't afford insurance.

Bud Carlson, a member of the Rotary Club of Tallahassee Northside who nominated Rutherford, describes how the architect provides his employees with generous benefits. "But his caring for their well-being goes far beyond benefits," he continues. "On many occasions, he has personally helped employees in their time of need." Rutherford's volunteer commitments are lengthy and wide ranging, from serving on an architectural oversight committee in Washington, D.C., to buying new shirts for all the boys at the Florida Sheriffs Boys Ranch in Live Oak last year.

Yet in the midst of this hectic schedule, he recently spent more than an hour talking to a prospective architecture student he'd never met before. Carlson, who sat in, relates: "He emphasized to the student that to be successful, he must approach life — not just architecture — with passion, honesty, and excellence. I am sure [Rutherford's] words will stay with him for life." — M. KATHLEEN PRATT

Get more ideas on promoting The Four-Way Test at www.rotary.org/rotarian. Learn more about the Tallahassee program at www.ethicsinbusinessaward.org.