

## CHAPTER 2

### A Discussion of Methods

The reader who intends to use these volumes for research purposes should not proceed without some knowledge of the methods used in preparing them and the consequent limitations on their usefulness. A scholar with many years of research experience, who was consulted during the planning stage of this enterprise, predicted: "When you are all through, then you will know how you should have done it." Three years of work have emphasized the accuracy of this observation. No one had ever attempted to prepare a comprehensive index in this field. Not only the specific objectives of the study but almost all the necessary techniques had to be developed with little guidance from similar work. A great deal of experimentation and even some re-definition of objectives was necessary during the first months of work. The value of the methods finally evolved can be determined only as investigators employ these volumes in studies of trade unionism and related subjects.

The original objective was to open up the stores of data in trade union journals and convention proceedings by preparing a subject index. A logical outgrowth of this undertaking was a bibliography of the journals, proceedings, and constitutions of all important international unions. But to prepare an adequate bibliography, it was frequently necessary to trace the confusing mergers, secessions, and affiliations of these unions because they resulted in name changes of importance to a bibliographer. Experience demonstrated that such chronologies are often essential for the interpretation of bibliographical listings, and they have therefore been prepared for all unions represented in this volume. Moreover, the research assistants who were responsible for indexing inevitably acquired an intimate familiarity with the publications of the unions which were assigned to them. The indexers were therefore asked to write analytical descriptions of the publications they had covered, indicating among other things the usefulness of each union's publications as a research source. As the value of the indexers' unique knowledge of the publications became more apparent, increasing stress was placed upon these reports, and they were made the basis for the critiques of trade union publications which appear in Part II of this volume. The methods used in preparing each of these types of product—the index, the critiques

of union publications, and the chronological and bibliographical data—will be discussed in turn.

## THE INDEX

### *Development of Subject Headings*

The first step in indexing was to develop an adequate list of subject headings. This task was somewhat like that of a taxonomist who sets out to classify and describe biological specimens. The categories set up in the beginning should be both comprehensive and mutually exclusive. They should include all of the theoretical concepts of social science which are relevant to an analysis of the behavior of trade unions and trade union members. The index headings should be sufficiently numerous to achieve adequate classification of the material, but not so numerous as to involve extensive overlapping and undue difficulty in using the index. Experience indicated that there was in this case no precisely determinable optimum number of headings; the number finally adopted was based primarily on considerations of convenience rather than on any logical standard.

Three main sources were drawn upon for headings: book indexes, consultation with students of trade unionism, and the union publications themselves. The indexes of about seventy-five general works and monographs on labor, economics, history, labor legislation and related topics were examined first. Many of these were mainly lists of names with scarcely any analytical headings and only a few proved helpful. After a preliminary list of headings had been assembled, the list was circulated among people with research experience in the field of trade unionism and related fields, and a considerable number of useful additions and suggestions were received. Finally, during all of the preceding stages, much time had been spent in trial indexing—*i. e.*, sampling volumes from many different unions, attempting to classify all the material under the preliminary headings and devising new headings wherever necessary. This proved to be by far the most productive method of developing headings, and even after actual indexing had begun it was necessary constantly to revise the list of headings. Each new union indexed added a handful of terms not previously encountered, and the broadening or finer subdivision of old headings was frequently necessary. Adding new terms created no great problems, but in revising old headings much care was essential to avoid changing or subdividing an established heading in such fashion as to necessitate reclassification of a large number of index

references. The list continued to grow and undergo revision until the last union was indexed. When the project began, the list contained some two hundred headings; it now contains about fifteen hundred.

A necessary accompaniment of the development of index headings was the careful definition of those headings which were not clearly self-explanatory. These definitions will be found at the beginning of Volume II. It should be noted here that distinctions not generally recognized were sometimes necessary to demarcate two closely related headings and avoid overlapping.

### *Classifying the Data*

After a reasonably adequate set of categories had been obtained, the difficult task of fitting items into these categories was begun. Even though the majority of items were easily, almost mechanically, classified, some cases required exacting analysis, and there were always a few which defied classification under any existing heading. Research into the practices and terminology of an industry was frequently required. For example, the Bricklayers' Union at one time discussed "tuckpointing" at some length. Investigation disclosed that tuckpointing was a form of dilution of skill and should therefore be classified under "technological change—dilution of skill—tuckpointing". The unions in the glass and paper industries, among others, use a great deal of technical language which required translation into the terminology of the index headings. In another case, members of a local union had (during the prohibition era) set up a speakeasy in the local meeting hall. After due consideration, this was classified under "auxiliary activities of unions, not officially sponsored." When an unclassifiable item was encountered, a description of it was written and filed in a "miscellaneous box"; this box was culled periodically by devising new headings where several similar unclassifiable items had been found.

An even more perplexing problem was to determine what material should be included in the index and what should be left out. There were two possible extremes: to index everything encountered in the publications, sentence by sentence where necessary; or to index only those subjects which were discussed voluminously in a particular union. After some experimentation, it was decided to eliminate completely certain types of material, and to index all other items only if they were at least five hundred words in length (or, in rare cases, four hundred words). This procedure is admittedly arbitrary, but some quantitative standard was essential

because it proved quite impossible to set any objective qualitative standards. A sampling of many union publications showed that a large proportion of editorials and letters from members were between five hundred and one thousand words in length, and that relatively few items of any significance were less than five hundred words long. A limit as high as one thousand words would therefore have excluded much material of considerable value, while a limit as low as two hundred and fifty words would have admitted a great many trivial items. The five hundred word limit does make it necessary, however, to caution the user of the index that the fact that there are no index references to a particular subject does not necessarily mean that the subject has never been mentioned.

Certain types of material were eliminated from indexing because they appeared to be of practically no value for research purposes. The excluded categories are:

(1) Material reprinted or summarized from another source, and strictly factual accounts of national affairs or the affairs of other unions. Some union journals rely heavily on matter reprinted from other labor periodicals, from magazines and newspapers, or from reports of government agencies. Although in a few cases—particularly in the case of local newspaper stories—this secondary material would be of some use, the arguments against indexing it are cogent. In addition to the fact that most investigators would prefer the original source, much material would have to be indexed several times over if reprints were included. Unions sometimes include in their publications statements submitted to government agencies and congressional committees; unless such material had been published as part of a government report, it was not considered secondary and was therefore indexed.

(2) Convention resolutions and constitutional amendments, unless accompanied by four or five hundred words of discussion. Because this material is so voluminous—some unions publish separate volumes of convention resolutions and proposed constitutional changes—and in many cases indicates only the opinion of a single individual, all of it was excluded from indexing unless it provoked a fair amount of discussion on the convention floor.

(3) Pointless, trivial, rambling, or otherwise useless material. This exclusion was narrowly construed, to eliminate only material which was so badly written as to be incomprehensible, discussions touching quite briefly on a number of unrelated topics, brief obitu-

aries, descriptions of picnics and other social affairs, and other material of like nature.

(4) Factual or technical material not directly related to unionism. This includes the sections in many union journals devoted to technical instruction: for example, courses in the problems of practical carpentry, or series of articles on the structure of locomotives. Such material also appears frequently in the correspondence sections of journals.

(5) Fiction, travelogues, or other matter included only for its entertainment value.

(6) Foreign language sections of official journals.

(7) In general, material contributed by persons outside the labor movement. An example of this material is a long series of articles on the general subject of churches and labor, written by a retired minister, which appeared in a large number of union journals over a period of years. Speeches to union conventions by mayors and other "official greeters," and also by bearers of fraternal greetings from other unions, were excluded; but a speech by a government official to a union convention on a subject of concern to the union was indexed.

This list is not absolutely comprehensive, and there are a few exceptions under each heading. In general, however, unless an item clearly fell under one of the preceding headings, it was indexed if it met the five hundred word standard.

### *Reference Forms*

A more technical problem of indexing was the development of reference forms. Early experience with the material indicated that it could be divided for this purpose into three main categories: single items, series of single items, and recurrent material. Although each required some specialized treatment, the same basic reference form was used for all. The technical details of these reference forms are explained in Volume II and need not be repeated here. It should be pointed out, however, that brevity was an important consideration because of the large number of references involved. This dictated the adoption of code numbers to be used in place of the names of unions, and the use of initials for various types of publications—J for journals, P for proceedings, Pres R for presidents' reports, and so on.

A single item, as indicated above, was defined as a connected discussion of five hundred words or more in length. The single-item reference form was designed to give the precise location of

the item, but the nature of the material made it impossible to indicate whether a particular reference was to an editorial, article, letter, speech, report, or something else. In too many cases it would have been impossible to draw the line between editorials and articles, reports and speeches, and so on. The elements of the single-item reference therefore are: 1, the code number for the union; 2, the symbol for the publication; 3, the volume number; 4, the date; 5, the page reference; and (rarely) 6, a word or two to identify or classify the items more accurately. Thus this type of reference reads as follows:

**K6: J—17 Jan 1938 pp 56-58.**

Indexing experience soon revealed a marked tendency in both journals and convention proceedings toward series of items on a particular subject, extending over several months or even over a period of years. For example, several unions debated at great length the merits of particular types of benefit plans. In these cases, individual index references soon accumulated in burdensome numbers. A form of combination reference was therefore worked out to cover such cases. This was called a "blanket reference." It has been used to indicate the weeks or months (in the case of journals) or the years (in the case of convention proceedings) in which considerable numbers of single items on the specified subject can be found, without indicating the pages on which the items occur. After some experimentation with attempts to locate items with the aid of reference forms lacking specific page citations, the quantitative standards for the use of this form explained in Volume II were developed. It is true that the abbreviated blanket reference is somewhat less convenient for the user than a more specific reference; but without this device the size of the index would have been greatly increased without any proportionate increase in convenience for the user. In the blanket reference not only the page numbers but also the volume numbers are omitted because the reference frequently overlaps two or more volumes. Thus a blanket reference reads:

**K6: J—Jan-Aug 1938.**

The recurrent material includes all items appearing regularly under approximately the same heading and in the same form over a period of time. Some of these recurring items deal with a single subject only, such as texts of collective bargaining agreements or the status of union benefit funds, and some deal with a heterogeneous assortment of topics under such headings as "News from Locals" or "The Labor Movement in Review." The homogeneous

recurrent material was simply indexed under an existing subject heading, using an adaptation of the blanket reference plus the symbol "re" to indicate that it was recurrent material. A brief description of the item was usually included also. Thus the recurrent item reference (without the description) reads:

**KG: J**—Sep 1918-June 1936 re.

The heterogenous recurring items have been classified as well as possible and they will be found, with complete descriptions of each, in Volume II.

### *Indexing Procedure*

The usual practice in indexing was to assign all the publications of a union to one research assistant, and also to assign related unions to the same person. The process of indexing did not require careful reading, except when the occasional hard-to-classify item was encountered. Indexers were instructed to skim instead of reading, examining each article, editorial, letter, speech or other item only long enough to identify its subject matter and write a reference on a 3 x 5 index card. Some of the indexers became sufficiently skilled in this technique to index a volume of 750 pages, from which 150 references might be harvested, in three or four hours.

In classifying items for the index, interpretation was held to a minimum. When Harry Bridges was called a communist in the publications, the item was indexed under "communists" without any attempt to determine the truth of the allegation. When the railroad brotherhoods argued for full-crew laws on grounds of public safety, the arguments were indexed under "full-crew laws"; when such laws were criticized as being designed merely to increase employment, the criticism was indexed under both "full-crew laws" and "make-work rules and policies." Moreover, except for the general rules governing the inclusion of material described above, material was not selected or rejected for indexing on the basis of its apparent quality. Much material has therefore been indexed which is probably of little value for any conceivable purpose; but this had to be so unless we were to substitute the indexer's judgment concerning the value of material for the judgment of the user of the index. The object was to locate for the investigator all the material which might prove valuable for his purposes, but to leave to him, as far as possible, the task of sifting, evaluating, and interpreting the material. In spite of all efforts to keep the index a neutral scientific instrument, however, the results which the

investigator can obtain have doubtless been conditioned to some extent by our techniques and our system of classification.

### THE CRITIQUES

Despite the speed of the work, each indexer inevitably accumulated much information on the general character of his union's publications and acquired considerable insight into the affairs of the union. Shortly after work on the first unions had been completed, each indexer was asked to write a brief critique of the publications of the union on which he had worked. As these critiques accumulated, their value as an aid to the use of trade union materials became increasingly apparent, and greater emphasis was therefore laid on careful preparation of them as a major part of the project. Begun as memoranda of approximately a thousand words, differing widely from each other in content, the critiques were soon lengthened and uniform standards for them were established.

Every effort was made to avoid value judgments in describing the publications. Some of the publications are of very low quality, while others are obviously well-edited and highly valuable as source material. It proved unprofitable, however, to try to compare the value judgments of a number of different people working on quite heterogenous material, and it was decided to describe the publications as completely as possible in objective terms and allow the reader to draw his own conclusions about their quality. The critiques set forth in detail the evidence from which one may conclude that the publications under review are "bad" or "good," "worthless" or "valuable," but without explicitly stating the conclusion. Similarly the reports express no judgments on the policies, controversies, personalities and events described.

In general, the critiques contain four main types of information. They describe the general nature of the publications—the relative importance of editorials, letters, articles, secondary material and other components at various times; the important events in the history of the union—strikes, internal fights, secessions, organizing campaigns and the like—which may be reflected in the publications; factors in the government or structure of the union which have affected its publications, *e. g.*, the use of initiative and referendum, which often stimulates extensive debate on policy issues in the union journal; and the objectives and problems most voluminously discussed in the publications.

The analyses will be found to vary considerably in content and style, for two chief reasons. They are based on reports by fourteen members of the indexing staff and, although these reports have been substantially edited and in most cases completely rewritten by the authors, some differences of individual approach remain in the final product. Much of the diversity, however, results from variation in the publications described. The critiques are not intended to be brief histories of the unions treated, but in some cases a union's publications are so infused with the life and philosophy of the organization that an adequate summary of the publications is necessarily a sketch of the union's history as well. The IWW is an example. At the opposite extreme, the journal and convention proceedings of the union may reveal practically nothing of what is happening to it or of the problems it faces. This is particularly true of some of the building trades unions. In still other cases, the published material yields much discussion of major issues before the union but relatively little of the union's history. Although indexers occasionally consulted secondary works for assistance in indexing difficult items and in untangling a union's history, the critiques are based exclusively on the publications indexed and thus reflect the inadequacies, biases, or gaps of the original material.

The critiques will probably prove useful primarily as a guide to subjects of research. A student considering a study of a particular union will find the appropriate critique helpful in estimating the usefulness of the union's publications; where his choice is not definitely fixed, the critiques may help him to determine which of several unions will best repay investigation. Again, reading a considerable number of the critiques will suggest many generalizing studies of the types described in Chapter 1. In the actual conduct of an investigation, the critiques and the index references will tend to complement each other. When the index contains many items on a certain subject in a particular union, the critique of that union's publications will usually provide a connected discussion of the context in which the items appear and the general nature of the material. Conversely, the reader can go from the critique, which locates material in a general fashion, to the specific references contained in the index.

### THE BIBLIOGRAPHICAL GUIDE

The aspect of the project yet to be described is the bibliographical guide, which together with the critiques constitutes Part

II of this volume. We have found about 275 national or international unions which have published at least one complete volume of an official journal or two convention proceedings. For each of these unions, the guide provides a chronology of its history, including the dates of organization, name changes, mergers, absorptions, secessions, affiliations, and the present name and address, if the union is still in existence; a list of the union's published convention proceedings and constitutions; and the dates of publication of the union's official journal, together with name changes, suspensions and irregularities in volume numbering. For all unions indexed the guide includes a list of editors of the official journal, with the dates of their service.

### *Chronologies*

The chronology of the unions is functionally related to the bibliographical data. In many instances the bibliography could not be understood without, for example, a list of the various names under which an international union has existed at different times. Similarly, knowledge of mergers, secessions, and absorptions is essential in tracing down a series of convention proceedings or constitutions. The need for such information became apparent at an early stage in the preparation of the bibliographies, and it was compiled originally for the use of the staff. It is published here in the belief that it will prove generally useful as reference material.

The historical information was drawn from numerous sources. Three editions of the Bureau of Labor Statistics publication, *Handbook of American Trade Unions*, proved useful on many points. The proceedings of the fiftieth annual convention of the American Federation of Labor, held in 1932, contains a list of all unions ever affiliated with that body, with the date of organization, the date of affiliation with the AFL, and (in some cases) the date of suspension, expulsion, or withdrawal from the AFL. The catalogues of the libraries of Johns Hopkins University, the United States Department of Labor and the John Crerar Library in Chicago were consulted. An unpublished manuscript, "Chronology of National Trade Unions", prepared about 1915 by T. W. Glocker, was also used with the permission of the author. For some of the older unions, the *Report of the Industrial Commissioner on Labor Organizations* (1901) provided helpful material. Finally, histories of the labor movement or of particular unions were indispensable. In the numerous cases in which two or more of these sources were in conflict, the conflict was resolved by going to the union publica-

tions wherever possible or by addressing inquiries to the officers of the union involved. When, despite all this, it finally proved impossible to verify a date or name, the most likely was used, followed by a question mark in brackets.

### *Bibliographical Listings*

The bibliographical listings are based upon the collections of trade union proceedings, constitutions, and journals in the U. S. Department of Labor Library, the John Crerar Library, the Wisconsin Historical Society Library,<sup>1</sup> and the Johns Hopkins University Library. Any volume of convention proceedings which is given unqualified listing, or any constitution listed, has been found in one of the four libraries or, in a few instances, at the union's headquarters. Where proceedings are listed in brackets, this indicates that a convention was held in the year listed, but no published proceedings have been found. If it is known that no proceedings were published, the convention is not listed. Officers' reports to conventions have been listed only when they are not published as an integral part of the convention proceedings.

The words "annual," "biennial," etc., have been used in the listings to show when certain volumes were published, and this usage does not always agree with the wording actually found on the material. Some unions use a dual system of numbering—*e. g.*, "28th consecutive and 4th biennial," "3rd regular and 1st constitutional," "12th national and 6th triennial"; some start numbering all over again after changing the frequency of conventions, so that one will be the 5th biennial and the next the 1st triennial; others start renumbering after important mergers; and some occasionally term conventions "annual", "biennial", etc., without regard to the number of years which have actually elapsed between conventions. To have followed such usages in the listings would have served only to confuse the reader. For the same reason, the term "proceedings" has been used regardless of the title given to the document by the union, and "convention" has similarly been used without regard to the union's terminology. In the listings of constitutions, each date given is the date of adoption or revision, unless starred (\*), in which case it is the date on which the constitution became effective and is the only date on the material.

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1. In this library only the catalogue cards for convention proceedings and constitutions could be checked. Union journals are catalogued under the city of publication rather than the name of the union, and the journals themselves are not filed in such a way as to be readily accessible.

In the case of journals, a listing does not necessarily mean that every issue of the publication has been found in one of the four libraries, because serial numbering is *prima facie* evidence of regular publication. Once the date of founding is established, successive volume numbers can be taken as good evidence of the publication of the intervening volumes unless suspension or irregularities in enumeration have been discovered. Wherever irregularities or suspensions have been found, they are noted in the bibliography. Such notes will be found rather frequently, because many unions are casual in their numbering procedure, repeating or skipping volume numbers without any break in the continuity of the publication, and because hard times frequently overtake union publications and force temporary suspensions. Occasionally, too, as with the International Brotherhood of Electrical Workers from 1908 to 1914, a union will be split into two factions each of which claims the official union name, and which publish two journals with identical names.

When the same union has had different official organs at different periods in its history, this fact is reported simply as a name change of the organ. In all cases the dates indicate when the name change became effective. The expression "1941+" in these listings means at least to the end of 1941. No changes in name or editorship effective after that date have been noted except in a few cases to eliminate possible confusion. Changes in editorship, noted for all journals indexed, have been taken from the material. In some cases, of course, an officer of the international union is officially listed as the editor of the journal when he serves merely in a nominal capacity, delegating control of the publication to an unnamed subordinate. The listings of the editors must be read with that qualification in mind. They have been included because some of the famous figures in the labor movement have been editors of journals, and because frequently a change in editorship has resulted in a major change in the journal.

The specific holdings of the four libraries represented in the bibliography have not been indicated. This would be a partial duplication of the function of the *Union List of Serials*,<sup>2</sup> which gives that information for practically all of the important libraries in the United States and Canada. That reference work should be used in connection with the present volume by those who wish to know the location of specific pieces of material.

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2. *Union List of Serials in the Libraries of the United States and Canada*, ed. Winifred Gregory (2nd ed.; New York: H. W. Wilson Company, 1943).

## INTERPRETATION OF BIBLIOGRAPHICAL LISTINGS: SUMMARY

1. *Name of union*: The name is that given on official publications of the union.
2. *Address*: Address is that of the official headquarters or mailing address of the union or, if the union has no headquarters, the address of the president or secretary of the union.
3. *Question Marks*: A questioned date means that no definite date could be ascertained, and the date given is the most likely. A questioned item with no date signifies that no basis existed for estimating the date.
4. *Use of (q. v.)*: A union followed by (q. v.) is one which is mentioned elsewhere in Volume I, Part II, and can be located by reference to the detailed list of unions which appears at the end of Volume I.
5. *Code Number*: Code numbers (A1, A2, etc.) are those used in Volumes II and III to identify index references to the publications of a particular union. Code numbers are given, therefore, only for unions which were indexed.
6. *Proceedings*: Both the date and number of each convention have been given wherever they could be ascertained.

Brackets enclosing numbers and dates of proceedings (e. g., [5th, 1873]) indicate that it is known that a convention was held in that year but it is not known whether proceedings were published. If it is known that proceedings were not published, the convention is not listed. Omission of a convention may also mean that no information was available concerning the date of the convention, or whether any was held. Conventions have been numbered consecutively, and the numbering used here does not necessarily agree with that used on the publications. The phrase "*with journal*" indicates that the proceedings were published either in an issue of the journal, in instalments running through several issues of the journal, as an entire regular or special issue of the journal, or as a supplement to the journal. Unless otherwise noted, the proceedings appeared in an issue or issues of the journal published relatively soon after the convention was held.

7. *Reports*: Only those officers' reports which were printed separately from the proceedings are listed. Omission of a date does not indicate that no reports were published that year, but only that no reports were published separately from the proceedings that year. Separate pagination of reports has been taken as *prima facie* evidence that the reports were published separately. "With journal" indicates that the reports were published in the journal in one of the ways noted under "Proceedings."

If reports are listed as "Officers," all officers' reports were published together. If a report is listed for president, secretary, editor, etc., each was published as separate report.

Semi-annual, quarterly, and monthly reports have not been listed.

8. *Constitutions*: Dates given are those of adoption unless marked with an asterisk, in which case the date listed is the one on which the constitution became effective and is the only date on the constitution.
9. *Journal*: Publication places are indicated opposite "published as"; the last place listed is that in which the journal was last published, or in which it was being published at the end of 1941.

1941+ indicates the name of the journal or editor at the end of 1941.

Names of journals are those given on the title pages of the journal unless otherwise noted.

Three dots (...) preceding or following the words "Journal," "Magazine," etc., signify that the complete and exact name of the union formed the remainder of the title.

10. *Terms and abbreviations used*:

ann.....	annual
bien.....	biennial
trien.....	triennial
quad.....	quadrennial
quin.....	quinquennial
conv.....	convention
spec.....	special
v. and vs.....	volume and volumes
no. and nos.....	number and numbers
NS.....	new series (new volume enumeration) begun