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1 Is it  
the truth?

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2 Is it  
fair to all  
concerned?

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3 Will it build  
goodwill  
and better  
friendships?

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4 Will it be  
beneficial  
to all  
concerned?

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Rotary International



Applying  
The 4-Way Test



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## ***Introduction***

For five decades Rotarians have been using The 4-Way Test as a practical yardstick in their business, community, and personal affairs. The 4-Way Test, you will note, does not provide answers. It asks questions which the user must answer. Thousands of Rotarians have used it and shared it with others. Millions of copies have been distributed to students and business associates. The Test has been carved into granite monuments, displayed on billboards, written into labor contracts, printed on wrapping paper and umbrellas, and has been the theme of countless essay contests and addresses.

This publication starts out by giving the history of the creation of The 4-Way Test by Herbert J. Taylor and tells how Rotary clubs around the world have promoted use of The 4-Way Test. You are invited to join other clubs in this endeavor.

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## *History of The 4-Way Test*

The 4-Way Test was conceived by Herbert J. Taylor, a Chicago Rotarian and president of Rotary International in 1954-55.

He applied The 4-Way Test to the operation of his company with remarkable results and subsequently shared it with others. The story is told best by Herbert J. Taylor in this description of how the Test came into existence and what effect it had.

“Back in 1932 I was assigned, by the creditors of the Club Aluminum Products Company, the task of saving the company from being closed out as a bankrupt organization.

“The company was a distributor of cookware and other household items. We found that the company owed its creditors more than \$400,000 in excess of its total assets. It was bankrupt but still alive.

“At that time we borrowed \$6,100 from a Chicago bank to give us a little cash on which to operate.

“While we had a good product our competitors also had fine cookware with well-advertised brand names. Our company had some fine people working for it, but our competitors also had the same. Our competitors were naturally in much stronger financial condition than we were.

“With tremendous obstacles and handicaps facing us, we felt that we must develop something in our organization which our competitors would not have in equal amount. We decided that it should be the character, dependability, and service mindedness of our personnel.

“We determined, first, to be very careful in the selection of our personnel and, second, to help them become better men and women as they progressed with our company.

“We believed that ‘In right there is might,’ and we determined to do our best to always be right.

“Our industry, as was true of scores of other industries, had a code of ethics — but the code was long, almost impossible to memorize and therefore impractical. We felt that we needed a simple measuring stick of ethics which everyone in the company could quickly memorize. We also believed that the proposed test should not tell our people what they must do, but ask them questions which would make it possible for them to find out whether their proposed plans, policies, statements, or actions were right or wrong.

“We had looked in available literature for such a short measuring stick of ethics but could not find a satisfactory one. One day in July 1932, I decided to pray about the matter. That morning I leaned over my desk and asked God to give us a simple guide to help us think, speak and do that which was right. I immediately picked up a white card and wrote out The 4-Way Test of the things we think, say, or do as follows:

“1. Is it the Truth?

“2. Is it Fair to all concerned?

“3. Will it build Goodwill and Better Friendships?

“4. Will it be Beneficial to all concerned?

“I placed the little test under the glass of my desk and determined to try it out for a few days before talking to anyone else in the company about it. I had a very discouraging experience. I almost threw it into the wastepaper basket the first day when I checked everything that passed over my desk with the first question, ‘Is it the truth?’ I never realized before how far I often was from the truth and how many untruths appeared in our company’s literature, letters, and advertising.

“After about 60 days of faithful, constant effort on my part to live up to The 4-Way Test I was thoroughly sold on its great worth and at the same time greatly humiliated, and at times, discouraged with my own performance as president of the company. I had, however, made sufficient progress in living up to The 4-Way Test to feel qualified to talk to some of my associates about it.

“I discussed it with my four department heads. You may be interested in knowing the religious faiths of these four men. One was a Roman Catholic, the second a Christian Scientist, the third an Orthodox Jew, and the fourth a Presbyterian.

“I asked each man whether or not there was anything in The 4-Way Test which was contrary to the doctrines and ideals of his particular faith. They all four agreed that truth, justice, friendliness, and helpfulness not only coincided with their religious ideals, but that if constantly applied in business they should result in greater success and progress.

“These four men agreed to use The 4-Way Test in checking proposed plans, policies, statements, and advertising of the company. Later, all employees were asked to memorize and use The 4-Way Test in their relations with others.

“The checking of advertising copy against The 4-Way Test resulted in the elimination of statements, the truth of which could not be proved. All superlatives such as the words *better*, *best*, *greatest*, and *finest* disappeared from our advertisements. As a result, the public gradually placed more confidence in what we stated in our advertisements and bought more of our products.

“The constant use of The 4-Way Test caused us to change our policies covering relations with competitors. We eliminated all adverse or detrimental comments on our competitors’ products from our advertisements and literature.

“When we found an opportunity to speak well of our competitors, we did so. Thus we gained the confidence and friendship of our competitors.

“The application of The 4-Way Test to our relations with our own personnel and that of our suppliers and customers helped us to win their friendship and goodwill. We have learned that the friendship and confidence of those with whom we associate is essential to permanent success in business.

“Through over twenty years of sincere effort on the part of our personnel, we have been making progress toward reaching the ideals expressed in The 4-Way Test. We have been rewarded with a steady increase in sales, profits, and earnings of our personnel. From a bankrupt condition in 1932 our company within a period of some twenty years had paid its debts in full, had paid its stockholders over one million dollars in dividends, and had a value of over two

million dollars. All these rewards have come from a cash investment of only \$6,100, The 4-Way Test, and some good hard-working people who have faith in God and high ideals.

“Intangible dividends from the use of The 4-Way Test have been even greater than the financial ones. We have enjoyed a constant increase in the goodwill, friendship, and confidence of our customers, our competitors, and the public — and what is even more valuable, a great improvement in the moral character of our own personnel.

“We have found that you cannot apply The 4-Way Test continuously 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. You thus become a better father, a better friend, and a better citizen.”

**A Vocational Service program** — In January 1943, the Rotary International Board of Directors agreed that The 4-Way Test should be brought to the attention of Rotary clubs. It became a part of the Vocational Service ideal and has been published in various forms and in many languages by RI.

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### *The Test goes to school*

“As the twig is bent, so grows the tree” is an old saying with considerable truth in it, as volumes of writing in modern psychology have proved. Because this is true, Rotarians have always shown a deep interest in young people. Introducing The 4-Way Test to them in their schools has proved an effective way to spread the ideal of Rotary.

In 1952 a pilot study to introduce the Test in schools was conducted in Kenosha, Wisconsin, U.S.A. The results of that study and other efforts in schools around the world show that by following a few simple steps a Rotary club can conduct a successful program, and since then hundreds of clubs in many countries have done so.

Here is an approach that has been found to be effective:

1. The Vocational Service and youth committees of the club meet to consider the feasibility of introducing The 4-Way Test to the local schools. Assign to members of the committee the tasks of estimating the cost of the project, developing tentative plans for contacts with a selected target school, awards for any contests, and gathering other information needed to present the idea.
2. If the two committees decide that the project is feasible, the committee chairperson should seek the endorsement of the club’s board of directors. The board should be presented with the details of the time and cost involved and what results can be expected.
3. Once the club has resolved to undertake the project, the school authorities must be approached for approval. They should be told of Rotary’s interest in vocational and youth service. The beginnings of the Test and its use in business and schools and social life should be explained.

If a faculty member of the school is already a member of your Rotary club, have him or her become involved in formulating and executing the plan for the Test among the entire faculty of the school and student leaders.

4. With permission of the school authorities, set up a meeting with a representative group of the faculty. This might include the heads of departments, the athletic coaches, and the faculty advisors of the school newspaper, and other student activities. Explain the project to them and work out a strategy for selling it to all members of the school community.

You probably will find a wide range of response from individuals at this meeting. Encourage objections and be prepared to adapt the project to the particular interests represented. Some will be more keen about the project than others. Those who are should be asked to undertake special responsibilities as the plan is developed.

5. The success of the project depends on the boys and girls accepting The 4-Way Test. If it comes to them as something from the teachers or imported from outside, there is a chance they will resent it or resist it. The best approach, therefore, would be to win the support of those students who are recognized leaders.

Call a meeting of the student governing body or of a group of popular individuals whose names have been supplied by the faculty. Explain the Test and its benefits to these students, relating it to their dealings with people in school, at home, in their social life, and in their future careers.

6. After you have made friends for the Test among student leaders, approach the entire faculty of the school. Explain that this project is something their pupils wish to try. Teachers can help them in many ways, and The 4-Way Test should help the teachers in their problems of discipline and understanding.

Stress that no criticism of the teachers is intended and present them with The 4-Way Test plaque to be placed on their desks and to which they can refer on appropriate occasions.

7. The stage is now set for the approach to the student body as a whole. It has been proved effective, however, to display The 4-Way Test posters in the classrooms and corridors of the school for about a week before this meeting occurs.
8. Whoever makes the explanation of The 4-Way Test to the assembly of the entire school has an important assignment. Informality, the light touch, simple sincerity, and, above all, brevity, are important.

Selecting the person to make the talk may involve consideration of who is most likely to arouse respect and interest. It might be a well-known alumnus of the school.



After the talk, distribute stickers carrying The 4-Way Test for students to place in their notebooks.

9. Follow through! It is not enough to introduce The 4-Way Test with a great deal of fanfare and then let it drop. Young people do not accept things without question. If the result of all your effort is that nothing happens, they are likely to take a cynical attitude toward The 4-Way Test and your club.

You can contribute to helping the students get involved in applying The 4-Way Test by offering a number of stimulating programs. These might include popular projects which have been put into effect by many clubs, a few of which are cited below.

**A speech contest.** The Rotary Club of Colombo North, Western Province, Sri Lanka, held two contests on the subject of “The 4-Way Test as a Way of Life” — one for students and one for the public, particularly working adults. Prizes included medals, cash awards, certificates, and gift pens. Judges were non-Rotarians drawn from the ranks of lawyers, parliamentarians, and public administrators.

**An essay contest.** The Rotary Club of Berri, South Australia, sponsored an essay contest on “How Can I Use The 4-Way Test in My Life?” and “Is The 4-Way Test Realistic in Australia?” Four hundred entries were received.

**A poster contest.** The Rotary Club of Ipoh, Perak, Malaysia, attracted 36 entries from secondary schools in its area with its poster contest. Six prizes were awarded based on color composition, general design, neatness, originality, and creativeness in bringing out the full effect of The 4-Way Test.

Have the **manual training class** or **art class** of the school make frames for The 4-Way Test posters displayed in classrooms and corridors. This was done by the Rotary Club of Savannah, Georgia, U.S.A., which takes a special interest in the local school’s manual training.

**Skits.** Students can write and act in skits on The 4-Way Test presented at a school assembly. The skits are valuable in persuading the student body to accept The 4-Way Test as their own rather than regarding it as a stuffy recipe of their elders.

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### ***Taking the Test to town***

The most dramatic instance of application of The 4-Way Test has been in introducing it to an entire community. Many of these community projects have been in conjunction with the introduction of the Test to schools, either concurrently or as a follow-up. Having introduced the Test to the young people, it is a logical step to go on and introduce it to their parents and the rest of the adult community.

The Rotary Club of Daytona Beach, Florida, U.S.A., inspired by a story of how The 4-Way Test was introduced to students in Kenosha, Wisconsin,

launched a similar program aimed at Daytona Beach schools with 4,000 students. In the words of the president of the club at that time: "The program worked so well that soon parents all over the city were asking about 'this 4-Way Test thing' their children all seemed to be learning in school. That's when some of us thought maybe we should take it to the whole town."

After procuring information from RI on how the Test had been applied in other places, the Daytona Beach club enlisted other civic and service groups in town to help.

Many ways were employed to get the message of The 4-Way Test across to the townspeople. Newspaper, radio and television advertisements, billboards, and posters were employed. The clergy based sermons on the principle inherent in the Test. Windshield stickers were distributed to motorists and cards with the Test were delivered to private homes.

After a year, statistics indicated The 4-Way Test was effective. Traffic accidents were down five percent and traffic injuries declined 20 percent. Juvenile delinquency declined, too. The year prior to introduction of the Test, 375 youngsters had been sent to detention homes. The year of the Test, the number declined to 184, a fact which educators in the city attributed to the influence of the Test. The Better Business Affairs office in the city reported that fewer complaints that came to it had to be settled in the courts.

The Daytona Beach project is just one variation of many successful efforts by clubs to introduce the Test to the community.

In Pittsburgh, Pennsylvania, U.S.A., a past district governor convinced negotiating labor (trade) union officials to incorporate the Test into a road haulage agreement.

Rotarians in Mwanza, Tanzania, displayed the Test on a prominent sign outside the busy modern Mwanza Hotel.

In Cape Town, Cape Province, South Africa, Rotarians secured government consent to introduce the Test in all schools of Cape Province and prepared 1,000 special kits in English and Afrikaans.

To celebrate its 20th anniversary the Rotary Club of Kagamigahara, Gifu, Japan erected flagpoles in front of its city sports complex and inscribed the Test at the base of the poles.

A 4-Way Test sign has been erected at a busy crossroads in Port of Spain, Trinidad & Tobago.

**A 4-Way Test week** — Some clubs have not been satisfied with confining their introduction of The 4-Way Test to the community to a single occasion. They have established an annual 4-Way Test week.

The Rotary clubs in the Greater Los Angeles, California, U.S.A., area have such a week, during which they publicize the Test through advertisements in local newspapers, editorials, 10-, 20-, and 30-second commercials on radio and television, and the posting of billboards in the area. The Rotary Club of Houston, Texas, U.S.A., makes extensive use of billboards for its annual 4-Way Test week.

**Blueprint for a community program** — The steps to be taken for a community introduction of the Test are:

1. A meeting of the Vocational Service and Community Service committees is called. If the community program is planned as part of the school introduction, then this meeting will also include the youth activities committee. These committees will assess the feasibility and desirability of such a project, determine the cost and effort required, and assign members of the committees various tasks in connection with such a program.
2. The chairpersons of the committees approach the board of directors of the club with their plan, detailing all that would be involved, and get board approval to launch the effort.
3. Since broad community support is desirable, various civic and service groups and clubs in town are approached. The Test is described to them and the success of similar efforts in other towns is outlined.
4. Explore the possible uses of the various media: newspapers, radio, television, billboards, posters, bumper stickers, etc. Enlist the help of Rotarians or non-Rotarians who are in the advertising or public relations business and approach the various media to see if they will consent to carry 4-Way Test messages as a public service. In some countries the broadcast stations and newspapers provide free time and space for this purpose and billboard sign operators are willing to contribute the use of a certain number of their boards for a good cause.
5. Mailings can be utilized. The various organizations cooperating in the campaign can send letters to their members explaining The 4-Way Test and asking them to cooperate. A mailing can be made to the residents of the town. Perhaps someone experienced in direct mail promotion can be enlisted to volunteer his or her time and experience.
6. Keep a record of the results of the introduction of The 4-Way Test to the community. Comparative statistics on crime, traffic accidents, juvenile delinquency before and after the introduction of the Test offer concrete evidence of the effectiveness of the program. This in turn serves as a stimulus to continue using The 4-Way Test.

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### ***The Test is everyone's business***

Here are five ways in which you can use The 4-Way Test in your business:

#### **I. Use The 4-Way Test in self-evaluation.**

The 4-Way Test helps Rotarians evaluate themselves and their service to society. It can help them analyze the way they do things.

Applying the question “Is it the truth?” to business procedures can uncover important inconsistencies. By applying the other questions of The 4-Way Test to their work, Rotarians may discover the need for fundamental changes.

## **II. Shaping policy and planning decisions.**

Application of The 4-Way Test in business decisions keeps an executive’s sights on the needs of others as well as his or her own. Although business leaders may sometimes assume that what is good for the company is good for everyone, the opposite approach may be more successful. People more readily embrace a policy they believe has benefits for them.

## **III. Analyzing problems.**

Since the early days of Rotary, club members have exchanged ideas and experiences. This helped improve their business and professional knowledge and helped them become aware of the human contradictions and ethical problems which everyone in business must face. From such searching and exchanges came The 4-Way Test and the first Rotary motto, “He Profits Most Who Serves Best.”

An informal and helpful approach to problem solving is the case study approach as the basis for discussion. Discussion of these problems produces a lively exchange of opinion which both informs and inspires the participants. Hundreds of Rotary clubs have used case studies in club meetings.

## **IV. Sharing Rotary’s ideals with associates.**

Case studies not only offer a basis for Rotary club programs but they provide Rotarians with material for discussions with associates. In this way, they can share the ideal of Vocational Service with non-Rotarians.

A Rotarian operating a watch service in Sweden felt his employees needed a code of conduct. Instead of drawing up a code himself, he asked his employees to meet in small groups to discuss the problems they encountered on the job. Out of these discussions came suggestions later adopted at the industry’s national conference. In the same way, Rotarians can show associates how to use The 4-Way Test in solving day-to-day problems.

## **V. Business relations conferences.**

In a business relations conference, which can last a day or longer, Rotarians may discuss the latest issues and trends with experts or with local businesspeople who may or may not be Rotarians. The conference can consider ways to attract customers to local businesses and to keep them from trading elsewhere. Each suggestion can be evaluated in the light of The 4-Way Test.

Reproducing The 4-Way Test in the following business communications is a good way to introduce it to your associates.

*Letterheads and calling cards.* The 4-Way Test should carry some statements such as “We try to measure all our policies, decisions and relations with others by The 4-Way Test. . . .” Those you deal with are thus invited to use the same standard.

*Enclosures.* A brief note telling how the company uses the Test in all dealings can be put in pay envelopes and in letters to customers, suppliers and competitors. A pocket-sized folder giving the story of The 4-Way Test (PA2-515-EN) in Herb Taylor’s own words is available from the RI office serving your club.

*Advertising.* Billboards and posters display The 4-Way Test in public places. Several Rotary clubs in India have had the Test flashed on local motion picture theater screens.

In accordance with RI policy, companies or individuals may reproduce The 4-Way Test in ads telling of their desire to be guided by it. The Test may not be distorted or related to any product or service offered in the ad. Several clubs have run ads listing all businesses in the community which have adopted the Test. Awards are given for the best letters on how these firms put the Test to work.

*Editorial comment.* Newspapers and company publications may comment on the Test, telling of its origin, its wide use, and how it is applied.

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### ***Members meet the Test***

Within the club, at regular meetings and at special events, The 4-Way Test can be presented conveniently to members and to guests.

Posters, desk plaques, pocket folders, pens, pencils, and many other items of a relatively inexpensive nature can be presented.

A question-and-answer period can be planned as part of a meeting in which members are asked to recite one or all of the four questions of The 4-Way Test. Some clubs fine members a small sum for not knowing the Test, donating the money to The Rotary Foundation or other worthwhile club projects.

The Rotary Club of St. Peters, Australia, presented desk plaques with The 4-Way Test to all non-Rotarian guest speakers. The Hollywood, Florida, U.S.A., club gave speakers fountain pens with The 4-Way Test printed on them.

In Matsue, Shimane, Japan, the Rotary club posted The 4-Way Test in the workplaces of club members.

The Rotary Club of New York, New York, U.S.A., regularly gave The 4-Way Test awards to businesspeople who have exemplified high ethical behavior in their vocations.

Desk plaques have been formally presented by clubs and districts to members of national and state legislatures and city councils in several countries.

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### ***Policy governing reproduction of The 4-Way Test***

The RI Board of Directors has established a policy governing the reproduction of the Test, which has been translated into more than 100 languages. The policy appears in the *Manual of Procedure* (EX3-035-EN).

All reproductions of The 4-Way Test should be in the following form:

### ***The 4-Way Test***

Of the things we think, say or do —

1. Is it the **Truth**?
2. Is it **Fair** to all concerned?
3. Will it build **Goodwill** and **Better Friendships**?
4. Will it be **Beneficial** to all concerned?

The sole purpose of any reproduction or use of The 4-Way Test should be the development and maintenance of high ethical standards in human relations. Any reproduction should not be a direct part of any advertisement intended to increase sales or profits; it may, however, be worked into a letterhead or other piece of literature, if done in a way to explain that a sincere attempt is being made to have all the human relations of the firm, organization, or institution conducted along the lines of The 4-Way Test.

When The 4-Way Test is reproduced in connection with anything to be distributed by a Rotary club or clubs, the reproduction should be followed by reference that appropriately associates the club or clubs with the attempt being made to promote the conduct of all human relations along the lines of The 4-Way Test.

The 4-Way Test should not be referred to as a “code” in any sense.

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### ***How to order 4-Way Test items***

Materials to help promote club, school, or community 4-Way Test projects include pocket folders and desk plaques that may be ordered through the RI office serving your area. See the “Catalog” (CD3-019-EN) for Rotary’s 4-Way Test materials with prices. In addition, a wide range of items — including auto decals and car tags, bookcovers, promotion kits and guides, paper weights, pens and pencils, T-shirts, and informative literature — may be ordered through The 4-Way Test Association, Inc., 4211 Carmichael Rd., Montgomery, AL 36106, U.S.A.

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## *The Object of Rotary*

The Object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and, in particular, to encourage and foster:

**First.** The development of acquaintance as an opportunity for service;

**Second.** High ethical standards in business and professions; the recognition of the worthiness of all useful occupations; and the dignifying of each Rotarian's occupation as an opportunity to serve society;

**Third.** The application of the ideal of service in each Rotarian's personal, business, and community life;

**Fourth.** The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.



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