

Moreno's Scientific Methodology: By, Of and For the People

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The chief methodological task of sociometry has been the revision of the experimental method so that it can be applied effectively to social phenomena. (Moreno, 2012, p. 39)

Abstract

This paper¹ is an exposition of the scientific methodology developed by Jacob Levy Moreno. It is based on an extensive reading of his writing and the discovery that the heart of his philosophy includes a research paradigm that incorporates human spontaneity and unpredictability. Six principles have been identified and formed into a working description so that research may be by the people, of the people, and for the people. The paper invites a greater consciousness of this research methodology. The author hopes that practitioners of psychodramatic methods will be encouraged to apply it in their work.

Key Words: Jacob Levy Moreno, social science, scientific methodology, principles of sociometry, psychodrama, experimental design, spontaneity.

Introduction

Early in my reading of J. L. Moreno, I was inspired to discover that he devised an approach to social science that included both the psychological depths and the empirical demands of science. Scientific innovation is a driving force in his work. Moreno devised ways to ethically and accurately investigate people. He found a way to overcome the difficulty for science that humans are unpredictable, complex, and capable of imagination that has no bounds.

Moreno's dramatic methods: role training, spontaneity training, sociodrama and psychodrama are practiced to this day (I will use the term psychodrama to cover them all). The methods have a built-in capacity for measurement, with a potential for research. However the *methodology of social science*, the research potential of the methods, is not so widely understood or implemented, at least in the English speaking traditions I am familiar with. The science he proposed is overshadowed by the therapy he devised. This is true generally and it was for me in my training. I read about

¹ This paper is based on a more detailed monograph (Logeman, 2013).

his hopes for a new science but they were not so relevant to me or to many others as we focussed on sorting out our lives. It appears this was experienced by Moreno (1978): "Everyone wants to do therapy..." (p. 695).

Moreno, scientist

Jonathan D. Moreno, in the introduction to his father's autobiography, describes Jacob Levy Moreno as "a religious prophet or a wizard or a guru ... he was all of these and a scientist." (Moreno, 2011). Scientific motivation and innovation was there at the beginning of his work. Moreno's science can't be understood without his whole philosophy and work. And his work can't be fully appreciated without grasping his scientific motivation.

Action and theatre were central to the formation of Moreno's approach and both were related to his theology and science. He wrote in the preface to *Theatre of Spontaneity*, first published in 1923, how that book "marked in my work the beginning of a new period: the transition from religious to scientific writing" (Moreno, 2010, p. 17).

Moreno's (2012) delight in the power of the stage as a research tool was evident when he wrote of this early discovery:

The theatre was a safe retreat for unsuspected revolution and offered unlimited possibilities for spontaneity research on the experimental level. Spontaneity could be tested and measured... (p. 17).

An amazing insight: theatre as a laboratory, indicating that social science has origins going back to the ancient Greeks and beyond. I have been in dramas where we enacted war and fought for peace and in those microcosms we explored what was possible. While the focus for these sessions was largely personal and group centred, I am now inspired to think how, with an additional warm-up, they could produce social research outcomes recorded to integrate new knowledge with the web of the old.

People are not objects

Moreno (2013) had an idea of the unique nature of human beings because of their autonomy and the power to create and destroy. This was an observation of the way people are and how they are different from machines. People are *conscious*. This is a profound fact: I am I, I can act, I can relate. Valuing these qualities in a person is something he shared with Martin Buber.

Moreno and Buber were contemporaries¹. Both men valued encounter. Both understood the ability to form an I-Thou relationship as a distinctly human quality. According to Buber (1972), science belongs to the I-It world. He wrote of the I-Thou relationship:

The world that appears to you in this way is unreliable, for it appears always new to you, and you cannot take it by its word. It lacks density, for everything in it permeates everything else. It lacks duration, for it comes even when not called and vanishes even when you cling to it. It cannot be surveyed: if you try to make it surveyable, you lose it. (p. 83)

Moreno, while having a similar understanding of the I-Thou relationship, believes investigation is possible without destroying the I-Thou-ness. We don't know if they ever discussed these things, however I imagine a conversation about the difference Moreno may have had with Buber that would stimulate his resolve and focus his work. I can hear them talking:

Buber: As soon as you can measure it, you have not seen it in its fullness. Connect with people and you are in a sacred space. This disappears if you step out to observe it.

Moreno: I'm with you when you say to connect with a person you need to meet, to encounter the person. That is different from the world of things. But, Martin, we *can* measure the relationship with people AND remain in the I-Thou world. We can create encounters and make the experience of measuring the relationships part of the encounter.

Buber: You can't convince me that it can be done. Once you are an observer, the encounter is over. Thou becomes an It, an object.

Moreno: It can be done, but with great difficulty. The world is not ready for encounters that are conscious, observed and measured. New theory, education and practice are required for this venture. Observation would not be at a distance but right there in the relationship. A method will need to be created; a method for investigating the I-Thou. A sociometry. Using the physical and biological sciences with people, you and I agree, would not be in the sacred realm of authentic meeting.

¹ Zerka Moreno (2007) published an item, *Moreno's Influence on Martin Buber*, in the Psychodrama Network News. She highlighted the importance of psychodrama as a means of creating encounter. The opening paragraph follows: "Dr. Robert Waldl from Vienna, who presented at both the New York and Miami conferences, has discovered that J. L. Moreno influenced Martin Buber in his ideas of The Encounter. Moreno started his publications from 1914 onwards under the title series *Einladung zu einer Begegnung*, or *Invitations to an Encounter*, predating Buber's *Ich und Du*, or *I and Thou* by nine years. A transcript with illustrations is published on Adam Blatner's website (Wald, 2010) and includes links to the thesis (in German)." (p. 6)

Buber: True encounter is hard enough and rare enough now. People are new in every moment.

Moreno: Yes. It will be a science of the here and now. People will participate in its creation. They are creators, like God, and they can consciously create something new. When people warm up together, to understand something, to create something, in spontaneity they will investigate and transform themselves at the same time. I'm going to make this happen; it is the only way we shall survive.

Buber: But is it ethical to have an agenda like this for other people?

Moreno: The new science will include participants' true motivations; what moves people to action. If spontaneity can be maintained it will be a democratic science and ethical in its foundations.

Moreno developed a way to measure relationships by incorporating mutual *conscious investigation* into the encounter. He called it sociometry. It embraced the ever-changing nature of people and in-the-moment nature of relationships.

Sociometry adds a research component to organizational or personal development. This is summed up succinctly in Moreno's (1978) seminal work *Who Shall Survive?* This quote is a key to understanding the whole book:

What, precisely, is sociometry?... It is the sociometric revision of the scientific method of the social sciences that will gradually make such a thing as a science of society possible. It gives its subjects research status by changing them from subjects into participating and evaluating actors; a social science becomes sociometric to the degree in which it gives the members of the group research status and the degree in which it is able to measure their activities; it goes to work with actual or prospective groups and develops procedures which can be used in actual situations. It puts an equally strong emphasis upon group dynamics and group action as upon measurement and evaluation. (p. 18)

The titles of some of his other writings also indicate his focus on science. The journal he founded was called *Sociometry: A Journal of Inter-Personal Relations and Experimental Design*¹. His book, *Sociometry, Experimental Method and the Science of Society; An Approach to a New Political Orientation* (Moreno,

¹ The journal changed to that name in 1951 (Vol XIV, 1) to "pay increased attention to the area of research with which sociometry has identified itself from the very beginning—the area of experimental design in the social sciences. Because of the growing need for deepening our knowledge in this area and in order to emphasize our desire to be of service we have broadened the title of this journal." – editorial

1951), is a treatise on method written to establish a new way of doing social science.

A third form of science

Moreno thought scientific methods devised for the physical sciences were not applicable to humans. Moreno was part of a movement against a long tradition of positivistic science that invalidated introspection as a way of knowing. He wrote that John Stuart Mill, who advanced the experimental method in science, “came to the exasperating conclusion that the experimental method cannot be applied to the social sciences, their subject matter being too complex” (Moreno, 1978, p. 71). Alongside the observational sciences and the physical sciences, Moreno insisted that sociometry is the third form of science; a science of humankind (see Moreno, 1978, pp. 358-359). A bold claim!

The experimental method in the social sciences was handicapped as long as it tried to follow the physical model; it really got under way in the first half of the twentieth century under the leadership of sociometry...
(Moreno, 1951, p. 13)

Moreno (1978) acknowledged his scientific methodology for investigating people was incomplete, and a “worldwide project – a scheme well-nigh Utopian in concept” (p. 121). In the many decades since Moreno proposed that a social science was possible there have been advances in sociology and psychological research. I invite psychodramatic practitioners to revisit the scientific methodology and values that Moreno proposed. To what extent is research sociometry applied? Can sociometric experiments lead us forward in understanding and advancing society? Those who grasp the power of Moreno’s work for therapy and social reparation are in a good position to also create groups specifically for a scientific purpose.

I identify and offer six principles distilled from Moreno’s writing to encapsulate his social science methodology.

Six principles of sociometry as a research methodology

“Sociometric procedure is not a rigid set of rules, it has to be modified and adapted to any group situation as it arises” (Moreno, 2012, p. 27). The researcher needs to be spontaneous and work with what emerges as the research proceeds.

The psychodramatic methods all include investigation, assessment and experimentation. For the methods to make a contribution to science, to become research, requires an *additional conscious focus* to contribute to human knowledge. For those familiar with dramatic methods this is a small but significant step. Moreno is explicit in how this is achieved and the following six principles summarise his approach.

Table 1. Six Principles of Moreno's Research Methodology

1. Warm-up

The researcher and the participants become informed, ready, willing and able to participate in a research project

2. Action in the here and now

Participation is done in action, in the moment. Learning is experiential

3. Gradual inclusion of extraneous material

Group process attends to the discrepancy between the overt and the underlying motivations

4. Co-action

Participants in the group become researchers, and the researcher becomes a participant

5. Adequate motivation to create change

Participants feel that the experiment is in their own cause

6. Collaborative recording and publishing

Recording and publishing is designed and integrated into the project by participants

1. Warm-up to research

What determines the extent to which a group is an experimental research project? The main factor is the warm-up. The researcher and the participants consciously embrace a research project by coming together for that purpose.

"The theory of sociometric testing requires that the participants in the situation are drawn to one another by one or more criteria" (Moreno, 1978, p. 99). If the warm-up includes research, then participants will embrace a research purpose.

Example: A few years ago in Christchurch a group of psychodrama practitioners met with the aim of trying out different ways of naming roles and seeing what were the most useful ways in their professional practice. The aim of the meeting was to develop role theory, and the warm-up led to a collaborative day. We concluded that short descriptions of roles were often more effective than the traditional adjective plus a noun.

2. Action in the here and now

Zerka Moreno said in her session at the Oxford international conference in 1994, "Dr Moreno created psychodrama because language is not the high road to the psyche, but movement is. From the earliest moments our actions communicate throughout a non-verbal period of life. Action is prior to

language" (Holmes, Karp, & Watson, 1994, p. 78). Moreno (1978) has a "Rule of universal participation in action" (p. 62). By being in the action the researcher gains something: "he is having experience, experience *in situ*; he is learning" (p. 62). Research, when in action and in the moment, evokes spontaneity: "Spontaneity operates in the present, now and here..." (p. 42).

Example: Various ways of doubling are described in psychodrama literature. In a training group, doubling was explored in action. Trainees gained a lived experience of a variety of processes. They reported on their learnings. This is a form of action research.

3. Gradual inclusion of extraneous material

A group may meet for an agreed specific research purpose, yet they will raise matters that are not directly related to the task in hand. Moreno (1978) speaks of the "Rule of 'gradual' inclusion of all extraneous criteria" and "the slow dialectic process of the sociometric experiment" (p. 63). He also speaks of a "rule of dynamic difference". This term is used to describe contrast of the formal agenda and the private aspirations (p. 62). The quality of research depends on the dynamics being revealed through group process and the relationships having high authenticity. In a sociometric research group, there will be personal discovery and relationship building as the actual experiences of group members are incorporated with the stated purpose of the group.

Example: A group of executives had the task of planning for the succession of the CEO. There was resistance to what appeared to some to be an obvious choice. The task became easier once the history of an error of professional judgment was revealed.

4. Co-action

Gene Eliasoph, one of the first psychodrama practitioners, tells how in 1954 he heard Moreno say, "We are all patients in this group, and we are therapists as well for one another. I will learn from you and you will learn from me, and who knows, we may be the first group to fly to the moon!" (Nicholas & Eliasoph, 2002). Moreno (1954) was speaking of therapy here. The same principle of co-action applies to research methodology:

The actor must become an observer of himself and an actor towards the observer. And the observer must become an actor towards the observed and an observer of himself; one must co-act with the other, a meeting is taking place. ... The methodological problem ... is to bring the act into the observer and the observer into the act. (pp. 358-359)

"The safest way to be in the warming up process yourself is to become a member of the group" (Moreno, 1978, p. 62).

In this setting, the researcher becomes a participant and the participants become researchers. There is mutuality. This is an encounter and role-

reversal. Each becomes the other "...each is carrying on his 'own experiment'" (p. 62) "...a social science becomes sociometric to the degree in which it gives the members of the group research status" (p. 18). Moreno speaks of being in *two groups at once*; one personal, the other a group of researchers (see pp. 62-63). He is talking about two aspects of the same group. An analogy is a psychodrama training group, where the training purpose, i.e. learning the method, is held strongly as people do personal work. In a training group members are also in *two groups at once*. People will take on different roles in the group at different times.

Example: A group of trainers plan to meet to explore the best way to work with relationships using the psychodramatic method and to develop the curriculum. The group devises how they will proceed as part of the group process, including experiments in their own life with their spouses and partners. These trainers become researchers at the same time as they are exploring relationships in their own lives.

5. Adequate motivation to create change

The first two sentences of *Who Shall Survive?* (Moreno, 1978) elucidate the connections between knowledge, unity and change:

A truly therapeutic procedure cannot have less an objective than the whole of mankind. But no adequate therapy can be prescribed as long as mankind is not a unity in some fashion and as long as its organization remains unknown. (p. 3)

For Moreno (1978) the purpose of knowing is to make changes that can be both universalised to all of humanity and also deeply personal.

In order to give every member adequate motivation to participate spontaneously, every participant should feel about the experiment that "it is his own cause, and not for the one who promotes the idea—the tester, the employer, or any other power agent." ... This should not be an experiment of nature without the conscious participation of the actors, but one consciously and systematically created and projected by the total group. (pp. 62-63)

Research can be motivated by external conditions, such as the researchers' desire to secure recognition and funding by the state or insurance companies. Moreno uses strong words when describing the neglect of the motivations of the people to be studied. The task of sociometry is "to correct the most flagrant error of methodical insight which has made social research trivial and confusing, while deteriorating its outlook" (Moreno, 2012, pp. 38-39). The researcher needs to enable participants to become conscious of their motivations. Moreno encourages a full encounter that is maintained at the same time as there is investigation of the relationships.

Example: The ‘citizen scientist’ movement where ordinary people take control of their health data, for example, making it public and running their own experiments about themselves, for themselves¹. The spirit of this movement where people unite to research common needs can inspire psychodramatic research.

6. Collaborative recording and publishing

Science includes the integration of new knowledge with the web of the old (Kelly, 2010). The purpose of science is to contribute to knowledge, hence the recording and publication of findings is an important step in a research project.

There are more publishing options available today than in Moreno’s lifetime. It is possible to innovate effective, inclusive recording and publishing that is of benefit to participants. It is increasingly easy to publish text, audio and video on the Internet and such data is more accessible and can be discussed online. Media transformation impacts the nature of science. Moreno advocated for the integration of recording into the group process:

Recorders, observers, and analysts are made natural parts of the group process: they are given a function of immediate usefulness for every participant. (Moreno, 2012, p. 43)

Example: A group of trainees collaboratively identify the principles involved in creating a group-centred warm-up and share the written summary with other trainees and trainers. Simple recording and allocation of writing tasks, such as editor, can lead to anything from handouts to flyers, articles and books. Sharing knowledge for posterity is an aspect of the scientific journey.

Integrating the six principles: A research methodology

These six principles outline Moreno’s philosophy of experimental design and form the basis of sociometry as a research methodology. The phrase, ‘near sociometric’ is used knowing that these aspirations can’t always be attained (Moreno, 1978, p. 102). The phrase, ‘maximum spontaneous participation’ (Moreno, 2012, p. 25) sums up the integration of these principles concisely.

These principles have been incorporated into other research modalities to varying degrees. Action research, for example, has its origins in what Moreno calls a secession in the development of sociometry by the followers

¹ The Wall Street Journal of 20th May 2015 illustrates how the power of citizen science can threaten those in power.

of Kurt Lewin. He described this in a paper in 1953 that was reprinted in the following year in the Preludes to *Who Shall Survive?* (Moreno 1978, pp. xcvi-cviii). Now more than sixty years later, Action Research has developed collaborative research methods. Psychodramatists and action research practitioners can learn from each other. The *Handbook of Action Research* (Heron & Reason, 2001), especially Chapter 16: The Practice of Co-operative Inquiry: Research With Rather Than On People, is an example of this.

It is understandable how research might be overlooked when the experimental method used includes deeply respectful encounters that are therapeutic. The potential for publishing results can be lost in the dramas of the moment. Awareness of the six principles may assist experimentation to be conscious and explicit.

Turning the tables: Morenian methods in the physical sciences

With extraordinary belief in the power of his methods, Moreno (1978) predicted his third science, sociometric research, would impact on the physical and biological sciences:

By the third millennium or thereabout a new position will crystallize. It will be a reversal of the old. ... Indeed, the leadership in scientific method and discovery which has been for nearly two and a half thousand years in the hands of physicists will pass to social scientists, and just as the social sciences were dependent upon the physical sciences for hypothesis and methods, the social sciences will some day help the physical sciences to understand and run the physical universe. (p. 31)

We are now in that third millennium. We know that physics has undergone paradigm shifts into quantum realms. Even at levels far less abstruse than the quantum, enactment on a stage can assist in the physical sciences. Consider this description of Richard Feynman, pioneer of particle physics, showing the power of role reversal, in this case with an electron:

Feynman's essential insight was to place himself once again in the electron, to see what the electron would see at light speed. He would see at light speed. He would see the protons flashing toward him—and they were therefore flattened relativistically into pancakes. (Gleick, 2011, loc. 7016)

As a psychodramatist who is tuning in with Moreno, I can see a glimpse of the possibilities. Our first task is to bring the principles and practice of sociometric research more consciously and fully into our own psychodramatic work, where it is already present to a remarkable but underdeveloped degree.

Conclusion

In this article, I have attempted to explicate the essence of Moreno's wide-ranging writing on scientific methodology by identifying six principles of sociometry. My hope is that this brief summation will lead practitioners, trainers and trainees in the psychodramatic methods to:

- study and evaluate the sociometric literature
- engage in work that has an explicit research purpose using the six principles
- on occasions, add an explicit research component to everyday psychodramatic work
- develop research that is deeply aligned with the motivations of the participants
- be more conscious of the research aspect of the term 'sociometry'.

Moreno was a visionary. He dreamt that his scientific methodology would enable people to collaborate; that together they would go beyond the surface structures of the group and reach levels of ethical spontaneity, unleash creativity, and channel deep motivations into action. The possibility exists that sociometry is a key to the survival of humanity.

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