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ABSTRACT

Project 2142 was a multi-phase effort to discover and mobilize for dissemination to rural decision-makers various information and findings pertaining to the quality of life experienced by rural people. The initial research phases involved design of a conceptual framework that placed some parameters on the variety of social phenomena studied. Interview data from a sample of rural decision-makers provided input regarding planning processes and the types of project outputs that would meet their needs. The major output of the descriptive social reporting phases involved the publication of a social indicator data book including time-series statistical data for each of nine north central Iowa counties. During 1977 these data were disseminated at a series of county conferences designed to help participants obtain a clearer idea of what a needs assessment involved and how the process could be undertaken. Systematic approaches to needs assessment (including the social indicator approach), advantages and disadvantages of each approach, pros and cons of citizen involvement, and ways of using the data book in needs assessment were presented. The initial focus of social indicator modeling was a macrosociological model of the determinants of physical health status, developed and tested using data on 99 Iowa counties. Overviews of each project phase and a bibliography of project outputs were included in appendices. (NEC)

# Social Indicators for Rural Development: Descriptive Social Reporting

**Final Report**

ED187486

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Submitted to: The North Central Regional Center for Rural Development

SOCIOLOGICAL STUDIES IN SOCIAL INDICATORS
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Sociology Report No. 141

November, 1977

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# SOCIAL INDICATORS FOR RURAL DEVELOPMENT

## DESCRIPTIVE SOCIAL REPORTING

## FINAL REPORT

by

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A Report Submitted to:

The North Central Regional Center for Rural Development
in cooperation with
Iowa Agriculture and Home Economics Experiment Station, Project 2142

Sociological Studies in Social Indicators

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Sociology Report 141
Department of Sociology and Anthropology
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November, 1977

# TABLE OF CONTENTS

# PREFACE

The purpose of this report is to summarize the research activities associated with one of the major phases of Project 2142, a twenty-seven month research project of the Iowa Agriculture and Home Economics Experiment Station at Iowa State University.[1] Specific attention is devoted to the discussion of social indicators for descriptive social reporting purposes. The document also serves as an update of project activities undertaken since the publication of the last progress report in November, 1976.[2] Progress reports can prove helpful to other researchers, as statements authored by other researchers have been, and continue to be, helpful to the staff of Project 2142.

The report is organized in seven major parts. The first two sections provide the reader with an overview of the purpose, direction, and scope of sociological studies in social indicators at Iowa State University. The third, fourth, and fifth sections present details regarding the stages leading up to, and including, the social reporting phase of these studies. The sixth section briefly discusses social indicator modeling activities undertaken by project staff. The final section describes future research activities. A bibliography of project output during the past year is also included.

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[1] The project is entitled, "Social Indicator Models for Rural Development," and is jointly supported by the North Central Regional Center for Rural Development and Title V of the Rural Development Act of 1972 (Iowa Title V Program).

[2] See: Gerald E. Klonglan, Richard D. Warren, Frank A. Fear, Rodney F. Ganey, Christopher E. Marshall, and Keith A. Carter, Social Indicators for Rural Development: Strategies and Approaches. A Progress Report. Sociology Report No. 132, Department of Sociology and Anthropology, Ames, Iowa: Iowa State University.

The research undertaken as part of Project 2142 is consistent with a programmatic approach to social indicator work initially described in two reports:

Wilcox, Leslie D., K. William Wasson, Frank A. Fear, Gerald E. Klonglan, and George M. Beal
1976 Toward a Methodology for Social Indicators in Rural Development: Base Report. Sociology Report 125, Department of Sociology and Anthropology, Ames, Iowa: Iowa State University.

Klonglan, Gerald E., George M. Beal, Leslie D. Wilcox, Frank A. Fear, and K. William Wasson
1976 Toward a Methodology for Social Indicators in Rural Development: Summary Report. Sociology Report 124, Department of Sociology and Anthropology, Ames, Iowa: Iowa State University.

Many persons have provided advice and assistance to the staff of Project 2142. The following people have been especially helpful: Fred Wepprecht, former Rural Development Specialist of the Iowa Title V Program; Clarence Rice, Community Resource Development Specialist, Fort Dodge (Iowa) Area Office; Henrietta Van Maanen, Area Extension Director of the Fort Dodge (Iowa) Extension Area; John Tait, Art Johnson, and Ben Yep, Iowa State University Extension Sociologists; and Norm Moklestad and C. Lynn Habben, County Extension Directors in Humboldt and Hamilton (Iowa) Counties, respectively. We are indebted to these, and many other, persons. Their contribution is truly appreciated.

November, 1977

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# ABSTRACT

Project 2142 is a multi-phase project which began July, 1975. The general purpose of the project is to discover, and mobilize for dissemination, various information and findings pertaining to the quality of life experience by rural people. One of the central audiences of the research is rural decision-makers.

Major research activities have involved work in the areas of descriptive social reporting and social indicator modeling. The purpose of descriptive social reporting is to disseminate trend-data regarding social conditions to relevant decision-makers. Exploration of the causes of changes in quality of life is the basic focus of social indicator modeling.

Several research phases prefaced activity in these areas. The initial phase involved the design of a conceptual framework for measuring quality of life. The purpose of the framework was to place some parameters on the variety of social phenomena which should be measured as part of descriptive social reporting and social indicator modeling work. The second phase involved interviewing a sample of rural decision-makers at the county and multi-county level. The purpose of the interviews was to enlighten the project staff as to how these decision-makers typically go about the planning process. The findings of these interviews promoted a better understanding of some of the salient problems and needs experienced by rural decision-makers and, in so doing, gave the staff ideas as to how project outputs could help meet these needs.

The major output of the descriptive social reporting phase involved the publication of a social indicator data book for each of nine, north central Iowa counties. The volume included a series of time-series statistical data that could be incorporated in the decision-making process. These data were disseminated at a series of county conferences during 1977. The conference agenda focused on the issue of needs assessment. The purpose of the conference was to help participants obtain a clearer notion of what needs assessment involved and how the needs assessment process could be undertaken. A number of systematic approaches to needs assessment (including the social indicator approach) were presented to the audiences. Various advantages and disadvantages of each approach were communicated, as well as some of the pros and cons of having citizens involved in the needs assessment process. The participants were also shown how the data in the social indicator data book could be utilized for needs assessment.

Work in the descriptive social reporting phase was brought to closure with the completion of the county conferences.

The initial focus of Project 2142 in social indicator modeling was on the health sector. A macrosociological model of the determinants of physical health status was developed and tested using data on the 99 counties of Iowa. The purpose of this social indicator modeling effort was to analyze cause-effect relationships among the dependent variable, physical health status, and independent variables representing demographic and economic resources; levels of well-being in education, housing, employment, and income; and the health system factors of financial resources in the health sector, health services, and utilization of health services.

A bibliography of recent project outputs is included.

# SOCIAL INDICATORS FOR RURAL DEVELOPMENT: DESCRIPTIVE SOCIAL REPORTING

## CONTEXT OF THE RESEARCH

### ISU Program for Social Indicator Research

Social indicator work in the Department of Sociology and Anthropology at Iowa State University has followed a research paradigm first proposed in 1976 (Wilcox, et al., 1976; Klonglan, Beal, et al., 1976). The paradigm represents a frame of reference for coordinating and sequencing the phases of social indicator research. Each succeeding phase of the research depends and builds upon the previous phase. Three distinct, yet interrelated, phases were identified: social bookkeeping, descriptive social reporting, and social indicator modeling.

The initial phase of the research, social bookkeeping, has been treated in detail elsewhere (Wilcox, et al., 1976: Chapter 5). The purpose of social bookkeeping is to commence the research process via the delineation of areas of social well-being, and specific social concerns within these areas, that appear to be particularly relevant from a quality of life perspective. Once the areas and concerns have been advanced, social indicators can be identified for measurement purposes. For example, if "income" is conceptualized as an important area of well-being and "income distribution" is conceived as a relevant concern related to the level of income, then indicators of income distribution, such as the proportion of families living in poverty, could be identified.

Descriptive social reporting serves as an extension of social bookkeeping. It is widely assumed that social indicators can be used

by social policymakers to enhance the decision-making process. If this is the case, social indicator data may be used, among other ways, to measure and monitor social conditions. Data of this sort have often been published in social reports. These documents typically represent data books which include a myriad assortment of social indicator data (i.e., social statistics) measuring a broad array of well-being areas, such as health, education, housing, and income.

The variables included in social reports often involve data routinely collected as part of government monitoring schedules. U.S. Census data, for example, are common to social reports.[1] Although some factor analysis work may be classified as descriptive social reporting, little or no effort is made in most social reports to empirically interrelate the indicators measuring the same concern or indicators measuring different concerns. Emphasis upon the interrelationships among indicators is more likely to be part of social indicator modeling efforts. Two significant distinctions separate modeling from descriptive social reporting. First, theoretical considerations are more apparent in modeling; the network of relationships are usually at the forefront of the inquiry. Whereas descriptive social reporting is an exercise in clarifying "what is," social indicator modeling usually concentrates on uncovering "why it is the way it is." While both issues would seem to be important for the

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[1] Much emphasis in social indicator research has been devoted to measuring quality of life from an attitudinal perspective. A macrosociological orientation is stressed in the Iowa State work; non-attitudinal data are exclusively used.

policymaker to take into account, social indicator modeling can provide the decision-maker with a more sophisticated knowledge base. Analytic social reporting, for example, can be viewed as an extension of social indicator modeling in that the policy interpretations of modeling results would focus on explanation and prediction. The limitation inherent in descriptive social reporting is that analysis is couched in the description of social conditions only.

To summarize, the phases of the ISU social indicator research paradigm are:

(1) social bookkeeping,
(2) descriptive social reporting,
(3) social indicator modeling, and
(4) analytic social reporting.

Research goals

Descriptive social reporting and social indicator modeling have been the foci of inquiry for project staff during the past year. Discussion in this report is largely devoted to descriptive social reporting activities; modeling efforts will be extensively treated in a forthcoming volume (Fear, Warren, and Klonglan, 1977).

As indicated in the preceding progress report (Klonglan, Warren, et al., 1976), much social indicator research in general, and descriptive social reporting work in particular, has been performed at the international, national, state, and metropolitan levels. A limited amount of activity has been devoted to developing a social indicator research program for rural development purposes. The thrust of Project 2142 has been to carry out a set of research activities at the non-metropolitan level. The work discussed in this report specifically deals with the activities associated with the research undertaken in a pilot multicounty

rural development region in north-central Iowa, The projects supported by Title V of the Rural Development Act of 1972 in Iowa concentrated research activities in this multicounty region.[1]

The major goals of Project 2142 have been to:

(1) Provide regional (multicounty) and county-level decision-makers with the best possible available data which can be used to measure and monitor the well-being of people,

(2) Help local-level decision-makers effectively incorporate these data into the planning process,

(3) Provide the general public with information about their collective well-being, and

(4) Provide researchers and other interested persons with details concerning the conceptual, methodological, and applied research problems associated with achieving goals #1-3.

Research Audiences

It may be apparent from the expressed project goals that three audiences are defined as particularly relevant: the decision-making community, the general public, and the scientific community. The reason why the decision-making community is considered an important audience of the research should be clear: The most articulated purpose of social indicator research is to generate a better understanding of the processes which contribute to, and bring about, what has been commonly referred to as quality of life. In addition, the goal of Title V of the Rural Development Act of 1972 (the co-sponsor of the Project 2142) is to provide local-level decision-makers with the kinds of information and research findings that may ultimately enhance the

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[1] The research work for Project 2142 was expanded, upon the request of Cooperative Extension administrators, to include three counties outside the pilot region.

decision-making process in non-metropolitan America, and in so doing, improve quality of life.

Perhaps the designation of the general public as a research audience is less clear. But emphasis on providing policy-relevant information to policymakers can often translate into an overemphasis. Quality of life data need not be solely disseminated to persons empowered with the responsibility of making decisions affecting social policy. The general public is entitled to this information as well. The pivotal questions are: What data should be disseminated to the general public? What mechanism(s) should be used to disseminate the data? These questions are more easily raised than answered; they pertain to politically sensitive, and logistically complex, issues.

Why is the scientific community a relevant audience? It may be ironic that the question is even posed; many researchers define the scientific community as their only audience. Suffice it to say that fellow scientists are defined as an important audience for all the traditional reasons and at least one more reason. As a relatively new research domain, work in the area of social indicators has been characterized by a plethora of experimental and exploratory activities. Much of this work will not reach the traditional medium of scientific dialogue--the professional journal--for several years. But social indicator researchers have much to learn from one another, particularly in terms of the unique experiences and the strategies for solving common problems they have faced.

This report provides a medium for quickly communicating what we feel are the important considerations and decisions which went into "how we did what we did." We have learned an enormous amount from

fellow researchers who have shared their approaches with us; we hope the material presented in this report (as well as the project documents referenced in Appendix F) will prove just as helpful to others in the field.

## THE RESEARCH PROBLEM

### Quality of Life in Perspective

"Quality of life" is a contemporary topic--one of the most talked about issues in today's world. Popularity of discussion aside, the concept, "quality of life," is as complex as it is current. The dimensions of life quality are literally ubiquitous. A variety of different aspects are often included as constituting the basis of life quality--depending on who is doing the defining. Good schools, accessible health services, convenient transportation systems, satisfactory employment opportunities, and an adequate income are among the constellation of variables typifying common definitions of the term. Adding to the complexity is the fact that many broad conceptualizations often include all of these--plus many other characteristics.

Quality of life is of primary importance to most people. It is logical to assume that we all, by and large, strive for "the good life." For this reason, social policymakers at all levels of government view improved quality of life as a central policy goal; social programs are intended to provide the services which will hopefully enhance quality of life for as many people as possible. The goal is far easier articulated than achieved; decision-makers face the incessant responsibility of allocating scarce financial resources in order to optimize the satisfaction of pressing human needs. Decision-makers attempt,

first, to identify what the needs are, and then to coordinate a series of programs to meet these needs.

What are the most important needs? How can we best meet these needs? Which programs are most successful in meeting needs? These are only several of numerous questions decision-makers must answer. These questions are also posed to the scientific community as the foci of basic and applied research.

Social Indicators and Rural Development

Much of the quality of life research undertaken by social scientists has been concentrated in what is known as social indicator research. The purpose of social indicator research has been variously defined--much like the generic concept from which it takes direction (i.e., quality of life). Most scientists agree that the overall thrust of the social indicator research movement is to provide decision-makers with relevant information and research findings which can be constructively incorporated in the policymaking process. The espoused goal constitutes a major challenge.

As mentioned, most social indicator work has concerned the international, national, state, and metropolitan levels; the thrust of social indicator activity has been largely devoted to international, national, and urban development efforts. Very little work, by contrast, has been directed toward rural development. But social indicator research has something to offer rural development.

It is now widely agreed that rural development may be best conceived of as a process, the aim of the process being to make rural areas more desirable places in which to live. The abstract connotations of "more

desirable" are obvious. Perhaps a more precise conceptualization can be offered: The purpose of rural development is to provide rural people with the best possible opportunities for experiencing a satisfying way of life. The variety of dimensions which characterized quality of life are embodied in this definition. A less apparent component of the definition involves an implicit goal of rural development: the policy of balanced growth.

Balanced growth can be conceived in at least three ways. First, the rural development process should emphasize as many of the dimensions which contribute to the "good life" as possible. In other words, rural people should have the advantage of sufficient educational and employment opportunities, quality health and public safety systems, and so forth. The notion of "balanced growth" is therefore not narrow in perspective; it means, in part, that the well-being of rural people should be emphasized in all those areas typically associated with quality of life. Second, rural development is ultimately people development. This means that whatever is accomplished in the name of rural development must touch as many people as possible. Balanced growth in this vein may also be cast as equitable rural development. Rural development should not only be comprehensive in terms of the breadth of program areas undertaken (i.e., health, education, housing, etc.) but also broad in terms of the number of rural people who are served by needed programs. Third, rural development may be viewed as part of the overall scheme of balanced national growth. That is, national prosperity cannot occur unless rural areas, together with urban areas, develop on a consistent and simultaneous basis.

## Social Indicators for Rural Development

How can social indicator research contribute to rural development? This question has been a major concern of the Project 2142 staff. One answer to the query is to insure that research activities emphasize both basic and applied research orientations. The purpose of basic research should be to discover and collate information about the nature and determinants of quality of life. The purpose of applied research, on the other hand, should be to develop and implement approaches whereby the resulting information and findings may be disseminated to local leaders and other interested parties. One of the tasks confronting the research community is to provide needed answers to the questions leaders pose when they are in the planning process. The success of applied research is not only predicated on the quality of basic research, but also requires researchers to focus attention on issues that are the most pertinent for solving the planning problems facing decision-makers.

If the convergence of basic and applied research efforts qualify as a meaningful frame of reference for social indicator work, the question then becomes: What specific types of basic and applied research should researchers conduct?

There is, of course, no single correct answer; a variety of topics and approaches have been adopted by researchers. The work in the Department of Sociology and Anthropology at Iowa State University has concentrated on two specific areas: descriptive social reporting and social indicator modeling. The two segments of the research scheme are part of the context of a much larger planning concern, needs assessment.

The purpose of descriptive social reporting is to provide decision-makers with a broad range of data that measure past and present social conditions. Rather than emphasizing a complex mathematical and statistical approach to these data, the Iowa State staff has employed a very simple and descriptive data set. Although relatively simple descriptive data are not as "powerful" in terms of information value when compared to other forms of statistics, many decision-makers do not have an extensive background in working with data. Therefore, the opportunity to work with an "easy to understand" data set may provide a more comfortable entre to planning with data; there is no need to understand and learn difficult statistical formulae. The social indicators included in the data set were well within the frame of understanding for most people. In turn, the data were extracted from publicly available data sources. They include "census-type" data from numerous government sources, such as periodical reports published by state agencies.

The scope of much descriptive social reporting is admittedly narrow. Little effort is usually made to interrelate social indicators. Therefore, the analyst cannot readily consider changes in social conditions from a cause-effect perspective. In other words, decision-makers are only given an accurate assessment of how social conditions have changed over time via descriptive social reporting; they are not given an answer to the question of what has caused conditions to change. That concern is part of social indicator modeling.

The purpose of social indicator modeling is to explore relationships within a set (or system) of social indicators. The exploration typically involves a focus on cause-effect relationships--if and to what extent

they occur--within some policy-relevant sector or sectors of society such as health, education, or housing. Without the ability to understand the relative affect certain factors have on pre-established goals or objectives, it would appear the policymaker is somewhat limited in his ability to direct social change in optimally desired directions. Social indicator modeling may provide the decision-maker with this type of information--and in so doing--provide a more sophisticated knowledge base than is possible via descriptive social reporting.

## INITIAL PHASES OF THE RESEARCH

We have established that the contours of the research involve basic and applied activities focused on social indicators for needs assessment. We also suggested that basic and applied efforts would pertain specifically to descriptive social reporting and social indicator modeling efforts. But the initial phases of the research were preparatory in nature and did not deal specifically with either descriptive social reporting or social indicator modeling. The purpose of the initial phases was to lay the foundation for the descriptive social reporting and social indicator modeling work that would follow.

### Designing a Conceptual Framework

One of the most apparent problems facing social indicator researchers can be succinctly phrased: What aspects should be measured via social indicators? Our brief analysis of the complex nature of quality of life should give some reasons to believe that the question is not easily answered. Quite obviously, not all aspects can be measured; the problem is how to arrive at the most theoretically and policy-relevant aspects which require measurement. One way to organize thinking in

this area is to construct a conceptual framework. The utility of such a framework is that, once completed, the researcher will have developed a general outline of the categories of variables that should be measured.

Conceptual frameworks in social indicator work can run the risk of oversimplification. Emphasis may be exclusively placed on measuring the level of well-being in policy-relevant sectors without measuring the various factors which may influence the level of well-being. There is at least one pragmatic reason for this emphasis; data on the status or level of social conditions are usually more accessible to researchers than other types of data.

The conceptual framework developed by the Iowa State staff included two basic features. The first feature involved identification of the areas of well-being that should be measured. Eight areas were identified: health, education, housing, public safety, income, employment, the physical environment, and leisure and recreation. Once these areas were decided upon, the next major question could be stated and resolved: What characteristics of these areas should be measured? Four specific components of the areas were considered as especially important from a measurement perspective: the availability and allocation of financial resources, the structure of services, the utilization of available services, and the level of well-being. The first three components represent factors which, more or less, can be manipulated by social policymakers in order to enhance the quality of life experienced by people in any particular well-being area. Well-being is measured by the final of the four components.

Although policymakers may manipulate various factors in their

attempt to affect quality of life in a positive way, there are various factors which are difficult, if not impossible, to manipulate that may influence the level of well-being experienced by people. We refer to these factors as constituting the resource base. The resource base involves the second feature of the framework. These resources pertain to a variety of unique factors which fundamentally characterize a geographical area. Three dimensions of the resource base appear to be of particular significance: the human (demographic) resource dimension, the geographical/physical resource dimension, and the economic resource dimension.

The conceptual framework is treated in more detail in Appendix A.

Interviews with Local-level Decision-makers

The problem facing many scientists involved in policy research is the fact that unless a fairly basic understanding of the policy process is obtained, it is unlikely that research results will contribute to problem-solving social policy. Even if an understanding of the dynamics of decision-making is present, another issue is pertinent: What are the major problems facing decision-makers as they engage in policymaking?

Such issues are important for researchers to take into account. With respect to the success of Project 2142, the research staff also felt we needed to discern whether the rural decision-makers to whom we would ultimately present our research outputs had used census-type data for planning purposes. We also wanted to know how often they had used this type of data, who typically made the data available for their use, and what specific variables were defined as most useful to them.

The design of the research was such that the descriptive social reporting activities would focus on providing secondary data to rural decision-makers in a nine-county region in north central Iowa. Six of these counties constituted the pilot rural development area for the Iowa Title V program. Prior to the actual commencement of descriptive social reporting work, the staff decided to get answers to some of the questions posed above. A sample of decision-makers at the multi-county regional level were interviewed. County-level decision-makers were also interviewed in one of the nine counties. The purpose of the interviews was to obtain a better understanding of how these planners typically went about the decision-making process and to identify some of the salient problems and needs with which they were often faced. The information would serve the important purpose of helping us design the outputs of descriptive social reporting in order to better meet the needs of those who would consume the data. Over thirty decision-makers were interviewed.

The content and review of findings resulting from the interviews are discussed in Appendix B.

## DESCRIPTIVE SOCIAL REPORTING: DESIGN

Perhaps no other area of social indicator research has experienced the popularity associated with descriptive social reporting. Nearly two hundred volumes containing social indicator data for descriptive social reporting purposes--often referred to as social reports--have been published in the United States during the past decade. Numerous social reports have also been published in such countries as Canada, the

United Kingdom, and France. The goal of the Project 2142 was to publish a series of social reports--one for each of the nine counties in the pilot research area. Before this goal could be accomplished, several basic problems had to be solved.

Selection of Social Indicators

The conceptual framework designed as part of the initial phase of the research was helpful to the extent that it placed some parameters on the types of phenomena we should measure. But the framework did not specify what social indicators to include in the social reports.

The interview data provided the staff with some insights as to which types of variables were useful, and not so useful, to some decision-makers in the pilot region. Other references to consult in deciding what social indicators should be published are social reports published by other groups. Although the data in these reports were not organized according to the framework developed by project staff, a content analysis of about thirty existing reports was helpful in establishing which indicators had been used in the past to measure certain social phenomena.

Six major criteria were used in the indicator selection process:

(1) Was the indicator identified as being useful for planning by any of the interviewed decision-makers?

(2) Was the indicator frequently mentioned in other social reports?

(3) Did the indicator seem to possess face validity (i.e., Does the indicator measure the general concept it purports to measure)?

(4) Are the data for the indicator available at the Iowa county level?

(5) If data were available, were the data timely (i.e., The data should be as up-to-date as possible, preferably of the post-1970 variety)?

(6) If data were available and timely, could the data be portrayed in a time-series (i.e., Data should be available for at least two time periods so as to permit the analysis of change over time)?

Data for approximately 350 social indicators met several or all of the above criteria. Data on these variables were mobilized for each of the nine counties in the pilot region. Data were also collected on all 99 Iowa counties for nearly 125 selected variables. The latter data set would be employed for social indicator modeling purposes.

Construction of Social Reports

There are almost as many social report designs as there are social reports. Many social reports differ in terms of the format by which data are portrayed, the number of indicators presented, the extent to which the data are analyzed, and the degree to which policy implications are drawn.

Our decision was to construct a fairly lengthy data book--voluminous by many standards--which presented multiple social indicators for each segment of the conceptual framework briefly outlined earlier. Each report included an introductory chapter and eleven data chapters--one chapter for each area of well-being (eight in all) and one chapter for each dimension of the resource base (three in all). The data in each chapter was internally organized according to other features of the framework, such as data on financial resources, the availability of services, the utilization of services, and the status of well-being for each area of well-being.[1]

The introductory chapter placed the data reported in the volume in context. A brief discussion concerned the issue of quality of life

[1]The table of contents from one of the reports is presented in Appendix C.

and how social indicators could be a useful component in effective planning. The conceptual framework was introduced to the reader in verbal and schematic form. Careful attention was also given to how the data were organized for presentation and how the data were presented in tabular form.

The decision regarding table design was one of the most difficult the staff faced. One basic table format was selected, with three variations of the design used in the report. The design was intended to make the data easy to read and understand. Time-series data were presented in all three variations with the county compared to at least one other enumeration unit in all three. In the first variation, the county was compared to the state. This design was most useful for presenting central tendency data, such as "median family income." The remaining design variations included data for the county, multi-county region, and the state. Aggregate data were presented for all three units; mean and median county values were also presented for the multi-county region and the state.

One major feature differentiated the latter two design variations: Percent change figures were calculated for between-year comparisons in both variations designs (as well as the first variation). However, many of the tables representing financial resource data included another dimension which we labeled as change in proportion. These data are important because revenue obtained, or the dollars allocated, in service areas can increase dramatically over time. Analysis of change via percent change figures may be deceptive in that important considerations are masked. Revenue or allocations may have indeed increased, yet

this may be due to inflation or other factors, so overall budgets would have correspondingly increased. Thus, an important question may be raised: To what extent has the revenue or allocation increased in proportion to the overall increase in the budgets from which these dollars came?

Data for about 220 social indicators were presented in each of the social reports. No attempt was made to analyze these data or consider the policy implications arising from changes in conditions over time.[1]

## DESCRIPTIVE SOCIAL REPORTING: DISSEMINATION

We have mentioned that getting secondary data into the hands of rural decision-makers and the general public is only the first step in the process of incorporating social indicators into the planning process. The feasibility of achieving the expressed goal involves at least one additional activity: Rural residents should be shown how the utilization of these data can facilitate the planning process.

### Basic Questions Pertaining to Dissemination

Since our intent was to stress the use of social indicators for needs assessment, the staff began constructing a dissemination model containing the specifics of how we would disseminate the social reports in a needs assessment context. A formal definition of the concept dissemination model was of the first order. Our definition read:

> A dissemination model represents a detailed account of the specific information and services made available via basic research which will be provided to audiences in the field.

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[1] The introductory chapter, including a graphic presentation of the table design variations, is presented in Appendix C.

This conceptualization led us to envision four critical questions to be answered as we explored the best mechanisms for providing outputs of the project in an applied setting.

(1) Who will be recipients of the information and services?
(Dissemination for Whom?)

(2) What information and services will be provided the recipients?
(Dissemination of What?)

(3) How will information and services be provided to the recipients?
(Dissemination through What?)

(4) Who will provide the information and services to the recipients?
(Dissemination by Whom?)

In anticipation of the dissemination process, the staff provided data to decision-makers prior to the construction of the social reports. During a three month period--approximately six months prior to the major dissemination effort--the project staff, in conjunction with multi-county Cooperative Extension specialists, began responding to requests for information and services on the part of decision-makers in the pilot area.[1] These requests came before, and during, the process of interviewing the decision-makers in the field. Requests typically involved the mobilization of secondary data which was then presented to the decision-makers. Project staff were responsible for mobilizing and organizing the data for presentation; extension personnel joined the

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[1] The Extension specialists included a regional Community Resource Development Specialist and Rural Development Specialist of the Iowa Title V program. These specialists played a vital role in the development and implementation of project activities. For a complete discussion of the role of field and state-level extension specialists in the scheme of project activities, see Fear, 1977a.

project staff during the dissemination process. Data analysis and policy implications were usually discussed with the client during the data presentation. Such experiences were useful in constructing and disseminating the social reports.

Dissemination via the County Conference: Purpose and Agenda

The experience of responding to requests for information and services (what we referred to as "information requests") provided a beneficial learning experience for the research-extension staff; it certainly facilitated planning for the major dissemination effort.

The decision was made to emphasize a series of county conferences as the primary means to disseminate the bulk of the information generated by the research staff. One conference was to be held in each of the nine counties in the pilot region. The conferences were defined as rather intensive in nature; a six-hour agenda was planned. Members of the project staff, an Extension sociologist, and the Extension Community Resource Development Specialist for the pilot region conducted the conferences.

The purpose of the conference was to consider the topic of needs assessment from a comrephensive perspective. Four major segments were included in the agenda:

(1) an overview of the needs assessment process;

(2) a review of three systematic approaches (the survey, key informant, and public forum approaches) to needs assessment;

(3) a look at needs assessment using the social indicators approach; and

(4) a review of sources of assistance beyond the workshop.

In more specific terms, the strategy was to accomplish at least 10 major activities during the conference:

(1) Help the participants obtain a clearer understanding of needs assessment.

(2) Consider the importance of needs assessment in the overall scheme of the planning process.

(3) Discuss the role of citizen input in the needs assessment process.

(4) Present some of the "pros" and "cons" of having citizens involved in the needs assessment process.

(5) Present four systematic approaches to needs assessment; consider the major advantages and disadvantages associated with each approach.

(6) Distribute the county social report.

(7) Indicate how the report was organized and what kinds of data were included in the volume.

(8) Show conference participants how the data in the report can be used for assessing needs.

(9) Indicate how those in attendance might solve some of their planning needs by using the services, knowledge, and expertise offered by the U.S.D.A.-I.S.U. Cooperative Extension Service.

(10) Evaluation of the conference by participants (so as to strengthen future programs).

A workbook that included some of the key ideas, concepts, and approaches discussed during the conference was prepared and presented to the audience.[1]

The conference was pretested in one of the nine counties. After revisions were made in the conference program, the remainder of the workshops were conducted approximately eight months later.

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[1]The conference agenda may be found in Appendix D, Part A. The workbook is presented in Appendix D, Part B.

Some of the material presented at the conference was introduced to participants through the use of somewhat non-traditional techniques. Three portions of the conference agenda are cases in point.

Prior to the discussion of the role of citizen input in the needs assessment process, conference participants were asked to complete a ten-item questionnaire (see Appendix D, Part A). The statements dealt with their attitudes and past behavior regarding citizen involvement in the planning process. The completed questionnaires were then scored by project staff, and the results were fed back to the participants later in the conference. Each participant then had an opportunity to see how his or her total score compared with other members of the group. An item analysis provided the frame of reference for a meaningful discussion of each of the ten statements.

The reader has been introduced to the conceptual framework used to organize the data in the social report. This framework could have been shared with conference participants by using the traditional "lecture" format. Since this portion of the program was of extreme importance to the overall success of the conference, the staff sought an innovative way to communicate the ideas included in the framework without unduly boring and/or confusing the audience. In preparation for the conference pre-test, the staff collaborated with the Extension staff to create a fictional short story about a young decision-maker who was introduced to the intricacies of the planning process by a wise, old planner during a dream. The short story was adapted into script form, and an audio tape was prepared for presentation at the initial conference. The tape ran 22 minutes. Since response to the idea by the pre-test audience was favorable, the staff took the idea one step further. The staff, in

conjunction with audio and graphic experts, produced a ten minute audio-visual program which was presented at the remaining conferences. While the "story line" of the script had not changed, the content of the story was condensed. A series of cartoons (representing an artist's conception of activity undertaken in the story) helped the audience focus on the interaction between the naive and wise decision-maker in a lighthearted, yet poignant, way.[1]

As previously mentioned, the problem of incorporating social indicator data in the planning process involves more than the delivery of needed information to decision-makers. Many planners also require some background as to how these data may be utilized. The approach developed by project staff involved training the audience in a multistep process for planning with data. Emphasis was on using the data for needs assessment purposes.

Following the audio-visual program and a brief review of how the social report was constructed, the staff took the participants through a series of steps, using a prepared example as illustration, which had them:

(1) Articulate what they felt the needs were;

(2) Review the data in the social report to see what information could be analyzed which had bearing on the identified problem;

(3) Remove relevant time-series data from the report;

(4) Make some interpretative judgments with regard to what the data for each of these variables were indicating in terms of social change; and

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[1] The script is not included in the conference workbook reprinted in Appendix D. Copies will be made available upon request.

(5) Make an overall interpretation about social conditions based upon the analysis of the data as a whole.[1]

The staff then communicated to the audience some of the problems associated with using the social indicator approach for planning.

## SOCIAL INDICATOR MODELING

Although the major purpose of this report is to discuss the descriptive social reporting phase of Project 2142, social indicator modeling is another important phase in the overall social indicator research program at Iowa State University. An overview of the initial work in the modeling area will be briefly discussed in this section. The discussion is consistent with the introduction to social indicator modeling presented in Klonglan, Warren, et al. (1976) and represents a synposis of Fear (1977c) and Fear, Warren, and Klonglan (1977, forthcoming).

Earlier in this report we suggested that social indicator modeling may be viewed, at least in terms of one perspective, as an arena for analyzing cause-effect relationships occurring within one or more policy-relevant sectors of society. The initial focus of our social indicator modeling work dealt with the health sector. The county was the research unit of analysis (N = 99).[2] A macro-sociological model of the determinants of physical health status was developed and tested.

The original model is consistent in scope and orientation with the conceptual framework upon which the descriptive social reporting work

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[1] An outline of the multistep approach is presented in Appendix D, Part B.

[2] The cases were the 99 counties in the state of Iowa.

was based. The model included ten major variables. Two variables measured factors which may influence the level of health experienced by an aggregate of people, but which are difficult for health planners to manipulate. The factors included basic demographic and economic features. Four variables involved the level of well-being in important sectors of society which are difficult for health planners to manipulate, but may also influence health status. These variables are the level of well-being in education, housing, employment, and income. The last set of variables measured health system factors, variables which health planners can manipulate in order to enhance the level of health status. Health system factors included: The allocation of financial resources in the health sector, the structure of health services, and the utilization of health services. The tenth variable in the model was the ultimate dependent variable--physical health status.

A relatively new technique was employed in the measurement process. Rather than using a single indicator or index to measure the concepts in the model, multiple indicators were employed. The multiple indicator approach permits the measurement of multiple dimensions of a complex concept without converting the indicators into a summary measure. A total of 77 indicators were used to measure the ten concepts. A series of empirical criteria were used as a means for selecting the two best indicators to measure each concept. A model building approach was then employed to evaluate the original model. Based upon the results of the theory building, the original model was moderately revised. The revised model was then tested using two different testing procedures.

Results of the multiple indicator model test suggested that the aggregate level of education was the best predictor of positive changes in health status. Health system factors, such as the structure of health services (e.g., the number of physicians), had a negligible effect on health status.

The table of contents of the volume in which the above is discussed in more detail is presented in Appendix E.

## FUTURE RESEARCH DIRECTIONS

The major thrust of the descriptive social reporting phase of the research was brought to closure with the completion of the county conferences. As indicated, the work described in this report represented a pilot effort; evaluation of the project (undertaken while this volume was in preparation) will provide a fertile background for the development of future research goals in the area of descriptive social reporting.

The social indicator modeling work has just begun. As discussed earlier, the initial focus of our social indicator modeling work dealt with the health sector. However, the concern with quality of life involves many other sectors, such as education, employment, and public safety. Thus, future social indicator modeling efforts will analyze cause-effect relationships within and among other areas of well-being; the result will be cross-sector analysis rather than the usual sector analysis.

Emphasis at this time has stressed the explanation of changes in social conditions from a cause-effect perspective. Although explanation is critically important, another aspect of the problem may be even more significant--particularly from the vantagepoint of the policymaker.

Reference is made to prediction. One variation of the modeling approach--viz., social forecasting--may be a policy-relevant means by which to communicate potential future states to decision-makers when a variety of different assumptions are made concerning other important social variables. Computer simulation techniques will be used as the primary methodological vehicle for the social forecasting efforts.

The problems inhibiting successful social indicator modeling, as in many other scientific research areas, are theoretical and methodological in orientation. An overemphasis may have been given to the solution of methodological problems confronting the social indicator researcher. Perhaps this is due, in part, to the fact that methodological difficulties are easier to resolve when compared to complex theoretical issues. But it can be argued that the contribution of social indicator research will only be as great as the strength of the conceptual systems upon which that research is based. And the significance of theory is not defined as such strictly from a "scientific" perspective; it is of vital importance for policymaking. The results of model testing, irrespective of the sophistication of the testing techniques used, will yield relatively meaningless information if the model is inferior. It is imperative that social indicator models adequately represent processes occurring in social and cultural systems that pertain to the problems facing policymakers. Therefore, the concern for developing stronger theoretical frameworks for social indication will be an integral part of future research efforts.

# APPENDIX A

## OVERVIEW OF THE CONCEPTUAL FRAMEWORK

(From; Klonglan, Warren, et al., 1976:10-13)

When discussing the measurement issue earlier in this report, we mentioned that one of the key problems facing researchers was knowing what to measure. It is evident from our description of Project 2142 that the research is designed to enhance the social policy process at the local level. Therefore, the answer to the question of what to measure should be approached from a policy perspective. We viewed the process of establishing what to measure as a conceptual or theoretical problem.

The conceptual process began by identifying a set of quality of life areas or sectors (which we refer to as areas of social well-being) that are commensurate with what is commonly conceived in the literature as embodying the basis of social well-being. The well-being areas are distinctive in that decision-makers are often in a position to "do something about" the problems facing people in these areas via social policy. We identified eight such areas:

| | |
|---|---|
| Health | Employment |
| Education | Leisure and Recreation |
| Public Safety | Housing |
| Income | Physical Environment |

Once these areas were identified, another question was raised: What are some of the things decision-makers can do to help improve the level of well-being experienced by people in the eight identified well-being areas? The staff identified three major types of activities. We refer to each activity or factor as a component in the conceptual framework.

1. The Financial Resources Component--Measures the amount of dollars available to decision-makers (local level in our case) that can be spent on the provision of services to people in each well-being area. Also measures how these dollars are allocated (expended) in terms of purchasing specific types of services.

2. The Structure of Services Component--Measures the number of services in each well-being area. These services include the service personnel and service facilities provided by programs.

3. The Utilization of Services Component--Measures the extent to which the services made available via expended dollars are being utilized. Also measures the accessibility people have to these services and the equitableness by which these services are utilized by relevant sociodemographic groups (e.g., racial minorities).

The three identified components in the framework measure broad factors which may contribute to the level of well-being. Measurement of the level of experienced well-being is the focus of the fourth component of the framework:

4. The Status of Social Well-Being Component--Measures the level of well-being experienced by people in terms of the criterion of "well-offness" or quality of living, i.e., how healthy, well-educated, well-housed, etc., people are.

The conceptualization done up to this point helped identify several key factors involved in the well-being process. Yet the conceptual framework was not sufficient due to a perceived lack of breadth. For example, a set of fundamental resources, available in varying degrees, characterized every geopolitical unit (such as a community, state, or nation) from a demographic, ecological, and economic perspective. The project staff noted that although many of these basic resources are either unmanipulable or, at best, very difficult to manipulate by decision-makers, they may affect the level of well-being people experience.

These considerations led to an expansion of the framework. A set of factors, referred to as the resource base, were added to the framework. Three dimensions of the resource base are described below:

1. The Human Resource Dimension--Measures various aspects of the population including population composition, population distribution, population change, and family structure.

2. The Geographical/Physical Dimension--Measures such aspects as amount and type of natural resources, climatic conditions, and how the land is organized (i.e., land use).

3. The Economic Dimension--Measures various factors which can affect the vitality of an economy. These factors are often associated with one or more sectors of the economic base. These sectors include the government sector, transportation and communication sector, agricultural sector, and commercial-industrial sector.

# APPENDIX B

## OVERVIEW OF THE INTERVIEWS WITH LOCAL-LEVEL DECISION-MAKERS

(From: Fear, 1977a:30-34)

### Sample

Non-probability "purposive" design

Interview the administrative chief, director, coordinator, etc., in every decision-making organization at the multicounty level in the Iowa Title V area and in one of the pilot counties.

How identify organizations?:

--Began by developing an inventory of organizations by area of well-being (in the conceptual framework) from the organizations identified in the Iowa Title V "Community Resource Development Directory" prepared by the Mid-Iowa Development Association in 1975.

--Asked the area Extension Community Resource Development Specialist (CRDS) and the Iowa Title V rural development specialist to independently develop a list of organizations at the multicounty level for each well-being area.

--Asked the County Extension Director (CED) in the selected pilot county to develop a list of organizations by well-being area for his county.

The initial list of organizations at the multicounty and county level was compiled from the above sources. We then employed a "snowball" approach during the interview process. Multicounty and county-level interviewees were asked to identify other decision-making organizations for their respective jurisdictional area (i.e., multicounty area or county).

N=33

### Content of Schedule

The interview schedule was fairly extensive in terms of breadth of coverage. The schedule was 39 pages in length and covered seven major topic areas. The schedule was designed by the research staff in close cooperation with the field extension staff (CRDS and Iowa Title V rural development specialist in particular, with some input provided by the CED in the selected pilot county). An average interview took between 1 1/2 - 2 hours to complete.

Ideas for the content of the schedule were drawn from the work of Krausz (1975)[1] in his study of the various kinds of rural development plans undertaken by local government officials in Illinois.

Seven areas of inquiry were included in the schedule:

1. On the decision-making structure:

   --What decision-making organizations, agencies, councils, and boards, other than your own, exist in your county (or multi-county area) for your area of concern (e.g., health)?

   --Which of the decision-making organizations, etc., you identified are likely to be discontinued in the near future? Why?

   --What new decision-making organizations, etc. are likely to emerge in the near future in your area of concern (e.g., health)?

2. On the parameters of the decision-making activities undertaken by your organization

   --In what areas of decision-making does your organization get involved (e.g., planning for health services, administering income maintenance programs, etc.)?

   --For each of these areas, what programs are currently underway? Which programs were designed by your organization? Which programs are only administered by your organization?

   --What new decision-making areas, not currently a focus of your organization, are likely to be a focus of activity in the near future (e.g., recruiting health manpower)? Why?

3. On needs-assessment

   --How does your organization typically come to the conclusion that a need exists which may require action by your organization?

   --How are needs ranked on a priority basis?

   --Do personnel in your organization typically consult with persons outside the organization when it comes to needs-assessment? If they do, with whom are they likely to consult (names of persons, organizational affiliation, positions in organizations)?

   --Are state and federal agencies very helpful to your organization when it comes to needs-assessment?

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[1] Krausz, N. G. P.
1975 Developing Local Government Action Programs for Rural Development. Champaign-Urbana, Illinois: Illinois Agriculture Experiment Station (Agricultural Economics Research Report No. 136).

--What do you think the role of researchers should be with regard to helping decision-makers such as yourself engage in needs-assessment?

4. On developing plans and programs

--Take a plan or program recently developed by your organization. Identify the key steps (phases) undertaken by your organization during the process leading to the implementation of the plan or program.

--What people outside your organization (names, organizational affiliation, positions in organization) participated in the planning process leading to implementation? At what point in the program development process did they become involved? Why?

5. On evaluating programs

--How often does your organization evaluate implemented programs in order to establish how successful they have been in meeting the needs which people have?

--How does your organization define "evaluation"?

--If your organization does not engage in evaluation, what are some of the reasons why?

--How essential do you believe evaluation is for telling you something of value that can be used in planning for future programs? Should "scientific" program evaluation be "built into" program proposals? Why or why not?

6. On the use of data in the planning process

--How often have you used statistics in the planning process?

--What are some of the reasons why you have used statistics? How valuable have these statistics been?

--Do you have a preference for objective (non-perceptual, census-type) or subjective (perceptual, survey-type) statistical data? Why or why not? In what ways have you used objective and subjective statistics in the past?

--Where have you obtained the data you have used in the past (what persons and organizations)?

--Do you believe researchers should provide you with statistical data for planning purposes?

7. Access to information sources

--Researchers requested the opportunity to inspect the reports, data books, data files, etc. on hand which the decision-maker had used in the past as data sources for planning purposes.

## Brief review of findings of particular relevance

1. On needs-assessment

A large percentage of respondents agreed that:

--We as decision-makers need better ways to find out what the general public feels important needs are.

--While better statistics are important for assessing needs accurately:
We need to make better use of available data. State-level agencies are not very helpful in providing data for needs-assessment.

--Researchers should help decision-makers find better ways to assess needs, provide data for needs-assessment purposes, and help decision-makers use these data in the needs-assessment process.

2. On evaluating programs

--Many decision-makers are engaging in "soft" evaluation; only a few are required to perform a "formal" evaluation.

--The overwhelming majority of those decision-makers who had engaged in evaluation felt it provided meaningful information.

--Many decision-makers thought researchers would be making a valuable contribution if they could devise a simplified format ("guide") for program evaluation that could be used at the local level by local people to evaluate programs.

3. On the use of data in the planning process

--Slightly more than half of the decision-makers interviewed had used statistical data in the past for decision-making purposes.

--The overwhelming majority felt that researchers should provide statistical data to decision-makers.

--Most decision-makers felt they should work with researchers prior to the provision of statistical data.

--About a quarter of those who had used statistical data in the past for planning purposes had used objective and subjective statistics about equally.

--There appeared to be no preference for objective over subjective measures, although about a fifth of the respondents felt objective measures were more useful for decision-making purposes.

Implications of results for future project activities

1. Paucity of data was evident at the local level for decision-making purposes.

2. Fewer-decision makers than we expected had experience in using data for planning process.

3. There was a real concern shown by decision-makers about needs-assessment and how data may be employed in the needs-assessment process. Perhaps an even more serious problem was the expressed desire to know what impact programs had made.

# APPENDIX C

## TABLE OF CONTENTS AND INTRODUCTORY CHAPTER OF COUNTY SOCIAL REPORTS

(From: Ganey, Fear, et al., 1977a: i-vi;1-17)

A SOCIAL REPORT
FOR
CALHOUN COUNTY:
SOCIAL INDICATORS FOR RURAL DEVELOPMENT

Prepared by:

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Project 2142
Iowa Agriculture and Home Economics Experiment Station
Iowa State University

Sociology Report 134A
Department of Sociology and Anthropology
Iowa State University
Ames, Iowa 50011

Fall, 1977

TABLE OF CONTENTS

## PREFACE

This social report is part of a research effort undertaken at Iowa State University in association with the Cooperative Extension Service (USDA and ISU). The research was conducted as part of the Title V program of the Rural Development Act of 1972.

A social report provides basic information concerning the quality of life experienced by people. The variety of statistics found in this report were included because they "indicate" something important about the quality of life in Calhoun County. Thus, these statistics are labeled "social indicators" because they measure important social concerns associated with quality of life such as health, education, employment, income, leisure, public safety, environment, and housing in Calhoun County. The data for most of these indicators are presented for several points in time so that changes that have occurred can be discovered.

This social report resulted from interaction among researchers and decision makers. However, the indicators found in the report should not be interpreted as being "the" indicators that will be used forever. Constant interaction between researchers and decision makers is necessary to provide the best indicators possible. Social reporting should be an evolving process between decision makers and researchers. This is one of the major reasons why the report is being distributed to many potential users during a workshop session. During the course of the workshop, decision makers will learn how the report was prepared, and why specific indicators were selected for inclusion in the report. They will also see how the data in the report can be used for planning, particularly during the needs-assessment stages of the planning process.

The need for social reports has been expressed on the part of many federal and state officials because massive amounts of information are being collected by innumerable government agencies, but much of this information is rarely organized in a usable form applicable to the planning process. This report is an attempt to organize policy-relevant information for Calhoun County. While many social reports have been published at the federal, state, and metropolitan levels, very few county-level social reports have been constructed. This report was developed in order to provide policy-relevant information at the county level.

The plan of this report is as follows. In Chapter 1, the construction and organization of this report is discussed. Chapters 2 through 12 contain the social indicators of the quality of life in Calhoun County. Each of these chapters will focus on a different area of social concern.

CHAPTER 1:

# INTRODUCTION

## THE PUBLIC CONCERN ABOUT QUALITY OF LIFE

Quality of life is a contemporary topic. The findings of countless opinion polls strongly suggest that the average American is vitally concerned about such public issues as environmental conditions, energy conservation and development, and population growth. Moreover, Americans in the 1970's have been faced with inflation, high rates of unemployment, and skyrocketing health care delivery and housing costs. Many people have started to ask whether we can achieve and maintain a high quality of life. A number of Americans believe that our quality of life has declined because of a decrease in the production and consumption of some of the "good things" of American life. It is apparent that America no longer possesses unlimited resources. Consequently, most of us understand that to secure a high quality of life, "trade offs" are necessary, but difficult, in the very complex situation of modern America. For example, the national thrust for energy conservation and independence often clashes with a personal desire for lower transportation costs.

*The burden of improving the quality of life is often squarely placed on the shoulders of public decision makers.* These decision makers are faced with the responsibility of developing, implementing, and evaluating the social plans and programs needed to insure well-being for all people.

While much attention is focused on the social problems confronting the nation as a whole, a variety of critical problems face people at the local level. For example, how may scarce resources be best allocated to improve health care delivery and housing conditions in the local community? State and federal decision makers often cannot help alleviate many of these problems as directly, or as well, as local-level decision makers. Local-level decision makers, being closest to these problems, have the potential to effectively act upon pressing social problems.

*The purpose of this report is to provide a basis for assisting local-level decision makers, particularly at the county level in the planning process.* In the remainder of this chapter, we shall explain more about the research, the content of the report, and how this report can be used by Calhoun County decision makers.

## WHAT THIS REPORT IS ABOUT: EFFECTIVE PLANNING AND SOCIAL INDICATORS

A major concern shared by decision makers at all levels is the ability to isolate the key problems facing the people to whom they are responsible. One of the many ways decision makers can obtain an understanding of what some of these key problems are is to analyze their jurisdictional area. One form of information is statistics that "indicate" the social well-being or quality of life experienced by people in the area.

For many years, economists have measured economic conditions through a set of economic indicators. However, the concern for improving our quality of life goes beyond what simply economic indicators can tell us. In addition to economic indicators, decision makers need social indicators of broader social conditions such as health, education, leisure, public safety, environment, and housing. Thus, the information provided by a set of economic indicators alone is not enough to assess the quality of life experienced by people. This belief is found in the goal of "balanced rural development." Balanced rural development refers to the notion that the quality of life experienced by people concerns more than is reflected by economic indicators of income and employment. Thus, a set of social indicators provides information beyond what is provided by economic indicators and hopefully, may be useful in improving the broad social conditions mentioned above.

During the past decade, researchers have been working on identifying a set of indicators that measure these broader aspects of quality of life. These social indicators are statistics that measure the noneconomic, as well as the economic, features associated with the quality of life experienced by people. Social indicators, therefore, measure well-being in a variety of generally recognized public concern areas. These concerns might include how healthy people are, how well-housed people are, and how safe people are from criminal activity.

Social indicator data have been used by decision makers at the national level as a basis for obtaining a keener awareness and understanding about how well-off people are and, in addition, how our quality of life has changed over a period of time. Data of this type have become a valuable asset in the social policy-planning process, especially when decision makers are trying to assess what major needs people have.

Whereas a great deal of attention has been devoted to developing social indicators at the national level, very little effort has been directed toward developing social indicators at the local level. Yet social indicators can help solve the problem of a lack of information experienced by many local-level decision makers due to the lack of access to data sources. Furthermore, social indicators can be a valuable tool in the process of effective planning since these data can provide the basis for an accurate and objective view of social conditions.

What types of indicators were selected for this social report on Calhoun County? We shall address this question in the next section.

## APPROACHES TO MEASURING WELL-BEING

Researchers, attempting to assist decision makers by providing data, must provide the type of data that is relavant to the policy-planning process. In order to come to an understanding about what policy-related indicators should be developed fo

Calhoun County, the research staff began by asking an important question: What are the major social policy areas in which decisions are made that affect well-being? We have referred to some of these policy areas in the previous section.

Eight policy-related areas of well-being

There are a number of policy areas that affect well-being. However, there is a fairly high degree of agreement that eight areas are of particular significance in American society. These areas are:

| | |
|---|---|
| Health | Income |
| Education | Employment |
| Public Safety | Environment |
| Housing | Leisure and Recreation |

Therefore, in attempting to enhance our quality of life through balanced rural development, important questions about these various areas of social well-being must be answered. For example:

1. Health: How healthy are our people?
2. Public Safety: How safe are our people?
3. Education: How well-educated are our people?
4. Employment: How many people are employed, unemployed, or underemployed?
5. Income: How able are our people to obtain a sufficient living income?
6. Housing: How adequate is our housing?
7. Leisure: Do our people have adequate resources for leisure activities?
8. Environment: How clean and safe is our air, streams, lakes, and rivers?

Types of indicators measuring key factors in the well-being areas

It is reasonable to assume that the next important step would be to identify a key set of social indicators for these eight well-being areas. But from a planning perspective, what types of information about each of these areas are needed? First, it is important to accurately measure the level or "status" of well-being. This will give decision makers information about current social conditions, such as how many people are unemployed, how many people are dying from cancer, and how many people are living in substandard housing.

A second very important question from a policy viewpoint is: What factors contribute to the level of well-being experienced by people? As we mentioned before, decision makers in a position to positively affect well-being have varying degrees of control over some of the key factors that contribute to our quality of life. What are some of these key factors? Three basic factors are: financial resources, services, and the efficient utilization of services. It should be noted these factors are closely related.

The most important factor of these three factors is services. Through the implementation of services, via social programs, decision-makers can help people meet some of their basic needs, such as health care. We usually think of services as coming in two forms: (1) the personnel who provide services (e.g., physicians) and (2) the facilities in which these services are offered (e.g., hospitals).

Yet it is impossible to implement new services, or maintain existing services without financial resources (e.g., money). Decision makers must have a sufficient amount of money at their disposal in order to provide the critical services which people require to satisfy their needs. Unfortunately, money is a scare resource. Therefore, the dollars available to decision makers must be judiciously and rationally allocated in order to provide services that help meet priority needs.

Furthermore, no matter how many financial resources are used to provide services, people must utilize services if these services are to positively affect well-being. One of the major problems facing decision makers in this regard is to insure that available services are efficiently utilized. This not only means utilization rates need to be carefully monitored, but also that services should be easily accessible to people in terms of both cost of the service and distance from the service. In addition, decision makers should know whether the people who need services the most (e.g., the economically disadvantaged) are actually using the available services.

Figure 1 provides a summary of our discussion. The three policy-relevant factors we considered as contributing to the level of well-being--financial resources, services, and the utilization of services--are illustrated. The evaluation of the level of well-being may help decision makers decide how available dollars can best be allocated. Thus, Figure 1 on page 6 depicts a decision-making framework that may be useful in the policy process. In summary, this decision-making framework contains the four basic factors of (1) financial resources, (2) services, (3) utilization of services, and (4) level of well-being.

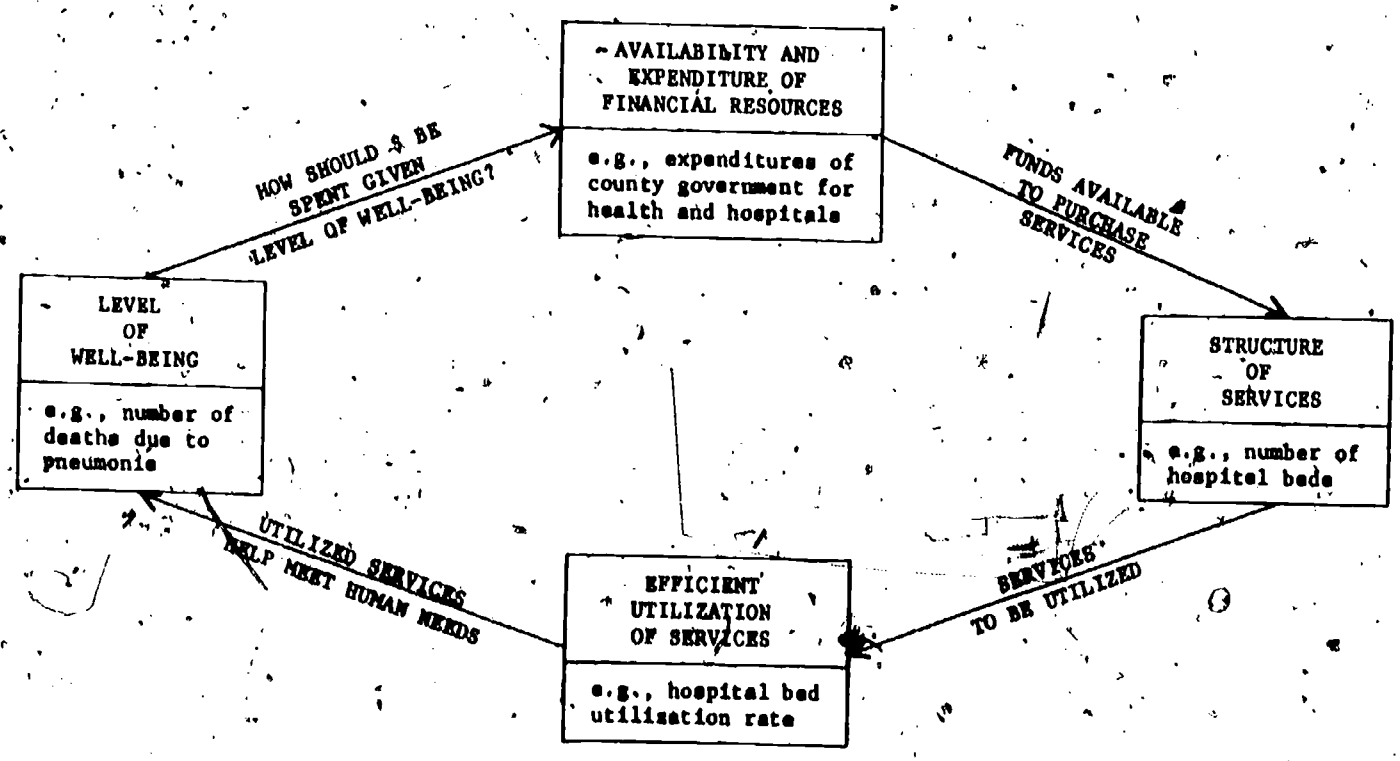
As mentioned, the research staff believes that social indicators for the eight well-being areas identified in the last section should be made available to decision makers. The four policy-related factors discussed in this section represent the types of indicators that should be made available in each of these areas. An example of an indicator measuring each factor for the health area is presented in Figure 1.

## Factors affecting well-being usually beyond the control of decision makers: the resource base

The three factors (financial resources, services, and utilization of services) considered in the previous section that contribute to the fourth factor (level of well-being) are, in varying degrees, under the decision maker's control. For example, a decision maker may decide to initiate, maintain, or terminate certain services.

Figure 1. Policy-related factors contributing to the level of well-being

Areas of well-being: Health,* Education, Public Safety, Housing, Employment, Income, Physical Environment, and Leisure and Recreation




* The health area is used as the basis for the different examples presented in each box.

*On the other hand, there are some factors thought to affect the level of well-being that are beyond the decision maker's control.* These factors may be considered basic socioeconomic and geographical variables that fundamentally characterize a political unit, such as a county. We view these as constituting a resource base. There are essentially three broad types of resources, as depicted in Figure 2 on page 8, that can be included in the resource base: human resources, geographical/physical resources, and economic resources.

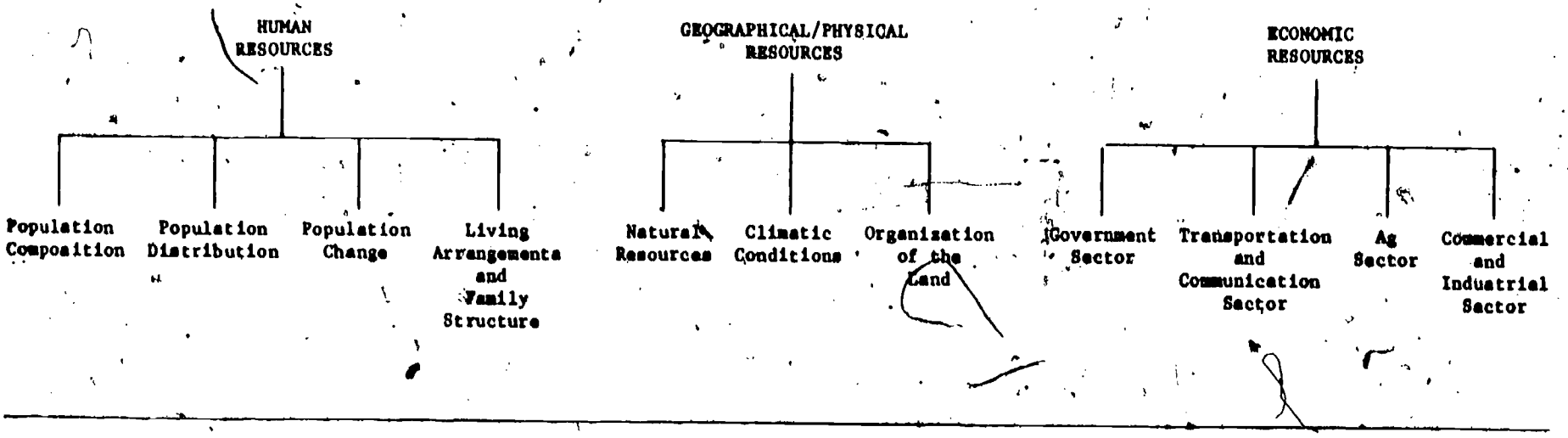
Human resources refer to a variety of important population-related conditions. Some of the variables associated with human resources are (1) the composition of the population (e.g., by age and sex), (2) the distribution of the population (e.g., the urban/rural distribution), (3) the change in population size, and (4) changes in living arrangements and family structure (e.g., trends in the number of marital dissolutions). Geographical/physical resources involve basic features of the land, such as the number of acres devoted to agriculture, the amount of available natural resources (e.g., forest lands, mineral deposits, etc.), and climatic conditions. Economic resources relate to the vitality of the economy as reflected in the following economic sectors: (1) government sector, (2) transportation and communication sector, (3) agricultural sector, and (4) commercial and industrial sector.

Dramatic changes in these basic resources, such as a significant increase in the number of people moving out of a locale, can effect well-being. Yet public decision makers cannot directly effect changes in out-migration. Since factors that constitute the resource base may effect our quality of life, decision makers should be aware of the changing conditions involving human, geographical/physical, and economic resources. Therefore, the research staff has identified social indicators that measure the resource base, as well as the eight areas of well-being. Many indicators of the resource base will be presented in this report.

## HOW THE SOCIAL INDICATORS IN THIS REPORT ARE ORGANIZED

There will be a number of chapters following this introductory section that include a select set of social indicators. Each chapter will focus on a different section of the decision-making framework introduced in the preceding section. In other words, there will be three chapters representing the resource base--one chapter for each major type of resource--human, geographical/physical, and economic. There will also be one chapter for each of the eight well-being areas. The social indicators presented for each of these eight areas will be organized according to the four factors associated with quality of life discussed earlier (availability and expenditure of financial resources, the structure of services, utilization of services, and the level of well-being).

Figure 2. The resource base



Each chapter will begin by providing a list of the specific indicators presented in that chapter.

## ABOUT THE DATA PRESENTED IN THIS REPORT

Decision makers and researchers alike have often argued that better use should be made of existing data. Massive amounts of social data are being collected by various agencies and organizations. However, much of these data are rarely organized in a useable form for making decisions and are rarely made available to decision makers and other people who could use the information. *One of the purposes of this report is to organize and disseminate social information that decision makers can use in their daily activities.*

Rather than collecting new data through surveys, the data presented in the report were derived from reports published by a wide variety of governmental and private agencies and organizations. Securing data from these sources is valuable from another perspective: data collected by agencies and organizations are often likely to be collected on a regularly scheduled basis. Many agencies, such as the U.S. Department of Commerce, have collected the same type of data for a number of years. This often means that comparable data can be mobilized and analyzed that cover a span of time, rather than for only one point in time.

Therefore, we have attempted to present only data which cover at least two points in time so that the reader can view the data with an eye toward analyzing social change. However, we do present some data for only one time period. Data for only one time period has been presented either because it was relevant or it was the only data available for a given factor. When more current data are published by various agencies, these data can be merged with the data published in this report for an even more recent evaluation of social change. This can provide an opportunity for publishing updated reports of this kind.

## HOW THE DATA ARE PRESENTED: TABLE DESIGNS

The data in this report will be presented in table form, and all tables have the same basic format. Data for each indicator will be presented in one of three alternative table designs, depending on the type of variable under consideration. All three table designs are similar in three basic ways: 1) most data are presented for at least two points in time; 2) data are presented for at least two different geographical units (e.g., county and state); and 3) if possible, computations are presented for analyzing social change. You may wish to refer to Tables 1-3 printed on the following pages as we discuss the specifics of the respective designs.

Table Design 1

Table 1 on page 11 presents data according to the first design. Median family income figures are presented for one county and the state for three points in time (1950, 1960, and 1970). With respect to social change, the percent change figures between time periods are also presented. Data on percent change permit the reader to see the change in median family income over a span of time. The data in Table 1 may be used for comparative purposes. One can view the changes that have taken place in Calhoun County, as well as compare the changes that have occurred in Calhoun County to changes at the state level. From this perspective, the reader may notice that the gap between the median family income level for Calhoun County and Iowa was actually greater in 1970 than in 1950.

Table Design 2

Table 2 on page 12 is a more complex version of Table 1. The focus of Table 2 is on the number of Aid to Dependent Children (ADC) cases. Data are again presented for multiple time periods, five consecutive time periods (1971-75) in this case. The major change in Table 2 as compared to Table 1 is the addition of a multicounty unit, the Iowa Title V rural development region, of which Calhoun County is a part.* The total number of ADC cases are presented for Calhoun County, the region as a whole, and the state of Iowa as a whole. You may notice that additional information is also provided for the region and the state.

In order to compare the number of ADC cases in Calhoun County with the region and the state, the reader may wish to inspect the number of Calhoun County cases with the mean county value for the region and state. The mean values represent the average number of cases per county in the region and the state, respectively.

The median (midpoint) county value for the region is also presented. The median value is often a more accurate figure than the mean, particularly when you are dealing with a small number of geographical units, as we are here, with only six counties comprising the region. The median may be more accurate than the mean because it is less affected by extreme (very large or very small) values. For example, if we wanted to calculate the median number of ADC cases for the region, we would rank-order the

*The six-county region includes Hamilton, Humboldt, Calhoun, Webster, Wright, and Pocahontas counties. The region is identical to Region 5 of the Governor's Office for Planning and Programming.

Table 1. Median family income.

| Governmental Unit | Year 1950 | Year 1960 | Year 1970 | Analysis of Social Change: Percent Change 1950-60 | Analysis of Social Change: Percent Change 1960-70 |
|---|---|---|---|---|---|
| Calhoun County | $3,007 | $4,244 | $7,741 | +41.1% | +82.4% |
| Iowa | 3,068 | 5,069 | 9,018 | +65.2% | +77.9% |

Source: U.S. Department of Commerce.

Table 2. Number of Aid to Dependent Children cases[a,b]

| Governmental Unit | Year | | | | | Analysis of Social Change: Percent Change | | | |
|---|---|---|---|---|---|---|---|---|---|
| | 1971 | 1972 | 1973 | 1974 | 1975 | 1971-72 | 1972-73 | 1973-74 | 1974-75 |
| Calhoun County | 63 | 75 | 84 | 85 | 93 | +19.0% | +12.0% | +1.2% | +9.4% |
| Total for Title V Area | 967 | 1,058 | 974 | 997 | 1,109 | +9.4% | -7.9% | +2.4% | +11.2% |
| Mean County Value | 161.2 | 176.3 | 162.3 | 166.2 | 184.8 | | | | |
| Median County Value | 81.0 | 93.5 | 95 | 93 | 105.5 | | | | |
| Total for Iowa | 21,898 | 24,357 | 24,030 | 24,263 | 27,918 | +11.2% | -1.3% | +1.0% | +15.1% |
| Mean County Value | 221.2 | 246.0 | 242.7 | 245.1 | 282 | | | | |

[a] Data are for fiscal year ending June 30.

[b] Cases continued to next year for 1971-74 and ending cases for 1975.

Source: Iowa Department of Social Services.

counties according to the number of cases for a particular year. For 1974, the number of ADC cases were: Webster, 609; Hamilton, 117; Wright, 101; Calhoun, 85; Pocahontas, 50; and Humboldt, 35. The median (midpoint or midrange) county value for the region in 1974 is 93 (the average of the Wright and Calhoun County values). The mean county value, on the other hand, is 166. In our example, the mean value for 1974 is affected by the higher number of ADC cases reported for Webster County, as compared to the other counties.

The "analysis of social change" design of Table 2 is the same as Table 1. The reader will note that the only change involves the addition of percent change figures for the six-county region. No percent change figures are calculated for mean county values since these figures change by the same percent as the aggregate figures. Calculation of percent change for the mean county values would be the same as for the aggregate figures within rounding error.

Table Design 3

Table 3 on page 14 is the most complex design of the three alternatives, but has the most information value. As an example of table design 3, Table 3 is identical to Table 2 in the breadth of time covered (1971-75) and number of governmental units considered (Calhoun County, the six-county Title V region, and the state of Iowa). There are two major differences, however.

Table 3 reports the amount of federal and state dollars available for county benefit expenses and administrative expenses associated with distributing benefits. Data in the Table do not report the total amount of dollars available for the purposes specified. The total amount would include local contributions. However, the figures in parenthesis reported for each geographical unit by year express the percent of the total amount of dollars for benefit payments contributed by federal and state sources. For example, of the dollars available to Caloun County in 1971 for benefits, and the administrative expenses thereof, came from federal and state sources. This figure increased to by 1975.

Table 3 also contains information beyond percent change that can be used for the analysis of social change. As in Tables 1 and 2, percent change columns are presented in Table 3; however, an additional set of columns are included in Table 3 under the "analysis of social change" section. We refer to these new figures as "change in proportion."

Comparative analysis of the percent change and change in proportion figures can provide some useful findings. For example, we find from Table 3 that between 1973 and 1974 the amount of dollars provided by federal and state services for benefit programs in Calhoun County decreased by 15.4%. However, we can raise another important question: Has the contribution made by federal and state funds to the total amount of funds available in Calhoun County decreased at the same rate?

Table 3. Federal and state funds for county benefit payments and administrative expenses[c,d]

| Governmental Unit | Year 1971 | 1972 | 1973 | 1974 | 1975 | Analysis of Social Change: Percent Change 71-72 | 72-73 | 73-74 | 74-75 | Change in Proportion[b] 71-72 | 72-73 | 73-74 | 74-75 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Calhoun County | $ 507,616 (92.0%)[a] | $ 549,991 (92.3%) | $ 463,674 (90.6%) | $ 392,045 (92.7%) | $ 510,653 (98.8%) | +8.3% | -15.7% | -15.4% | +30.3% | +0.3% | -1.7% | +2.1% | +6.1% |
| Total for Title V Area | 4,939,920 (88.7%) | 5,432,823 (89.0%) | 4,689,254 (87.8%) | 4,043,015 (91.9%) | 5,444,276 (99.5%) | +10.0% | -13.7% | -13.0% | +34.7% | +0.3% | -1.2% | +4.1% | +7.6% |
| Mean County Value | 823,320 | 905,471 | 781,542 | 673,836 | 907,379 | | | | | | | | |
| Median County Value | 551,364 | 607,275 | 519,986 | 409,407 | 529,742 | | | | | | | | |
| Total for Iowa | 107,696,391 (87.9%) | 117,571,885 (88.1%) | 109,248,429 (87.3%) | 134,421,309 (94.0%) | 181,820,925 (99.7%) | +9.2% | -7.1% | +23.0% | +35.3% | +0.2% | -0.8% | +6.7% | +5.7% |
| Mean County Value | 1,087,842 | 1,187,595 | 1,103,519 | 1,357,791 | 1,836,575 | | | | | | | | |

[a] Figures in parentheses represent the federal and state funds for county benefit payments and administrative expenses as a percent of the total funds for county benefit payments and administrative expenses.

[b] Change in proportion represents the change in the amount of federal and state funds adjusted for change in the total funds for county benefit payments and administrative expenses.

[c] Dollar figures represent funds for the respective fiscal year ending June 30.

[d] State total includes dollars allocated to the district offices of the Department of Social Services.

Source: Iowa Department of Social Services.

Data reported for "change in proportion" show that the contribution of federal and state funds to the total amount of funds available actually increased by 2.1% between 1973-74.

"Change in proportion" figures make a more accurate evaluation of percent change figures possible. This contribution is particularly useful when analyzing budget figures. In a time when budgets often increase at rapid rates due to inflation and other factors, it is not unusual to find a 50% or perhaps 100% increase in the dollars allocated for certain services over a short time span. However, one should view these figures in proper perspective and ask whether this increase in allocation actually means a greater proportion of the total budget is expended for the service or services under scrutiny. Analysis of the "change in proportion" figures for the data presented in the report will make this type of judgment possible.

## LIMITATIONS OF THIS REPORT

The major limitation of the report relates to problems associated with data. Three interrelated problems appear significant: 1) the problem of obtaining the most recent data possible; 2) the problem of data comparability; and 3) the problem of mobilizing data from a wide variety of sources.

### Mobilizing recent data

We mentioned that data for this report were taken from a variety of public and private sources. These sources include reports published by the U.S. Census Bureau and annual reports filed by state agencies. The major problem confronted in this regard is that the period of time between data collection, publication, and circulation is often very lengthy. This problem is particularly acute when dealing with federal agency reports.

Since the process of collecting and publishing data on a regularly scheduled basis can be extremely expensive, various agencies of the federal government often provide important data that are rarely collected on a routine basis by other groups. For example, many key variables measuring the social and economic characteristics of the population are collected only once every ten years through the decennial census. However, most of the data collected in the 1970 census were not widely available until 1972. An even more significant question can be raised: How useful are 1970 data to decision makers in 1977? This problem is not reserved to the general census. For example, data for the 1974 U.S. Census of Agriculture were not available until late 1976, and the 1974 report on "County Business Patterns" for Iowa counties will not be distributed until 1977.

The above discussion is not an indictment against federal

data collection and processing agencies--it takes a great amount of time to carefully prepare data for wide distribution. It is only meant to alert the reader to a serious problem. Decision makers should have the most recent data possible at their disposal. Unfortunately, the luxury of having a variety of current data for decision-making purposes is, in most cases, unlikely to become a reality for some time to come.

Data comparability

Organizations often change the definition of variables for which they collect data. For example, the definition of what constitutes a "farm unit" in 1950 was changed in 1960 by the U.S. Census Bureau. Consequently, if one wants to know how much change has occurred in the number of farm units or in the number of rural farm families between 1950 and 1960, it would not be appropriate to compare 1950 with 1960 data if the definitions of "farm unit" are different for the two points in time.

Another source of difficulty regarding data comparability occurs when data collection agencies redefine variables by merging similar variables. For example, data reported in 1971 on "federal funds for county benefit payments" and "state funds for county benefit payments" were merged in 1972 to create a new variable--"federal and state funds for county benefit payments" in the Department of Social Services "Annual Report." This again creates problems when one is trying to mobilize comparable data over time.

One final data comparability problem must be discussed. If two or more agencies collect the "same" type of data, one must insure that the definitions of the variables for which you are seeking data are identical. Otherwise, the data are not comparable. For example, suppose one is trying to collect data on "taxable payrolls of industries at the county level" for two points in time. Data are reported by Agency A involving the amount of the taxable payrolls in 1974, but Agency A will not publish data for this variable again until 1979. In the meantime, we discover Agency B also publishes data on taxable payrolls for 1975. At least two definitional questions must be resolved before the data can be considered comparable: 1) Do both agencies define "taxable payroll" in the same manner, and 2) Do both agencies derive their taxable payroll figures from the same industries?

Quite obviously, when data are not comparable over time, the depth and breadth of the data base will suffer as a consequence. Furthermore, much high-quality data may have to be dropped altogether.

Data not obtained

The reader has probably recognized that a great deal of data is required in order to measure quality of life in the way discussed in this report. Perhaps the reader also realizes that no single agency collects and processes all the data needed to measure well-being from the policy perspective we have outlined in this report. This means that the staff had to become acquainted

with the types of data provided by a truly wide variety of agencies and organizations.

The staff has tried to become as knowledgeable as possible regarding what federal, state, and private agencies publish what data and how often these data are published. We were ably assisted in this search by staff of the "Government Documents" section of the Iowa State University library.

However, there may be sources of very useful data which we were not able to locate. For example, we were not able to find much data regarding the accessibility (in terms of cost and distance) of services, and the degree to which services are utilized by all socioeconomic groups in the population. Such data may be very important in analyzing the utilization of the services which are offered. In many instances, data available for the community level were not available for the county level. Therefore, these data could not be presented in the report. Also, data may be available that would be more appropriate indicators than those reported for sections of this report. Therefore, if you know of such data that we were unable to obtain, we would appreciate hearing from you regarding the location of these data.

## A SOURCE OF ADDITIONAL ASSISTANCE

Obviously the data presented in this report will not satisfy all the information needs Calhoun County decision makers face. However, not all the data mobilized by the research staff appear in the following chapters. A considerable amount of additional data for Calhoun County are on file in the project research office in Ames.

Perhaps you may be faced with the need for social data that are similar in kind to the data presented in this report but are not specifically published in this volume. If you are confronted with this problem, contact your county extension director, Mr. John L. Creswell. Describe to him the kinds of data you need. Mr. Creswell, working with Mr. Clarence Rice (your regional Extension Community Resource Development Specialist), will inform the staff of your request. The staff will check their data files and see if the data on hand can help solve your information problem.

We realize we cannot satisfy everyone's information needs in one report, but we would like to help you obtain the information, not included in this report, that you do need. By providing this service, we feel we will be helping you obtain as much information as possible in carrying out your responsibilities. This service will hopefully make a contribution to the task of improving the quality of life in Calhoun County.

# APPENDIX D

## AGENDA FOR COUNTY CONFERENCES

### PART A

1. Flyer publicizing conference (Humboldt County, Iowa).

2. Where do you stand? Questionnaire (see text for explanation, p. 22). (Questionnaire adapted from: Mushkatel, 1974).

3. Conference evaluation questionnaire

### PART B

1. Conference workbook (Ideas for workbook were adapted, in part, from the work of: Mushkatel, 1974 , Voland and Hobgood, 1975 , and Warheit, et al. (1975) ).

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Mushkatel, Al
1974 Styles of Decision Making. Collegeville, Minnesota: Center for the Study of Local Government, St. John's University.

Voland, Maurice E. and Thomas N. Hobgood
1975 Social and Economic Indicators for Planning. Raleigh, North Carolina: The North Carolina Agricultural Extension Service.

Warheit, George J., Roger A. Bell, and John J. Schwab
1975 Planning for change: Needs Assessment Approaches. Gainesville, Florida: Department of Psychiatry, University of Florida.

# APPENDIX D

## AGENDA FOR COUNTY CONFERENCES

### PART A

1. Publicity flyer
2. Where do you stand? (questionnaire)
3. Conference evaluation questionnaire

## About the Conference Agenda

The burden of improving the quality of life is often squarely placed on the shoulders of public decision makers. Each county's decision makers are faced with the responsibility of developing, implementing, and evaluating the social plans and programs needed to insure well-being for all people in the county.

While much attention is focused on social problems confronting the nation as a whole, a variety of critical problems face people at the local level. For example, how may scarce resources be allocated to improve health care delivery or housing conditions in the county and its communities? What mix of resources and programs will best solve problems related to income opportunities, education, leisure activities, public safety and in our environment? State and federal decision makers often cannot help alleviate many of these problems as directly, or as well, as local-level decision makers. Local-level decision makers, being closest to these problems, have the potential to effectively act upon pressing social problems.

The day's agenda was developed to provide a basis for assisting local-level decision makers, particularly at the community, county, and multi-county levels, in the planning process.

Emphasis will be on familiarizing conference participants with those essential steps involved in identifying local needs, determining priorities among needs, and assigning resources and developing programs which will improve quality of life in your county. Essentially, how to utilize the planning process in local decision making.

**AND JUSTICE FOR ALL**

Programs and activities of Cooperative Extension Service are available to all potential clientele without regard to race color sex or national origin Anyone who feels discriminated against should send a complaint within 180 days to the Secretary of Agriculture Washington D C 20250

# Conference

# For a Better Tomorrow in CALHOUN COUNTY

**a program from:**

Iowa State University
EXTENSION SERVICE

D-3

**November 28, 1977**
**Amvets Club, 511 Court St.**
**Rockwell City**
**Registration 9:00 a.m.**
**Program 9:30 a.m.-3:30 p.m.**

70

THIS IS YOUR INVITATION . . . to attend the Conference for a Better Tomorrow in Calhoun County.

Planning for the conference was done by the Calhoun County Extension staff, Extension Area Office personnel, and members of the Iowa State University Sociology faculty.

The conference is designed to be appropriate for those responsible for policy and decision-making for their governmental unit, agency, or organization.

Persons in leadership positions in all aspects of Calhoun County life have been invited to attend.

The program format will be a combination of instruction and group activities, with ample opportunity for discussion and questions and answers. The meeting will be informal and is meant to be a learning experience for all involved.

Registration fee of $4.25 includes all materials and the noon meal and may be paid in advance or at registration the day of the conference.

## PROGRAM

9:00 - 9:30 a.m.: Registration and Coffee.

9:30 - 9:35: Welcome and Introductions.
John Creswell
County Extension Director
Calhoun County

9:35 - 10:00: Overview and Explanation of purposes of the Conference
Frank A. Fear
Social Indicators for Rural Development,
Project Coordinator,
Sociology Department,
Iowa State University

10:00 - 11:00: An Overview of the Needs Assessment Process.
What is needs assessment?
How important is citizen participation?
Frank A. Fear
Sociology Department
Iowa State University

11:00 - 12:00: Three Systematic Approaches to Needs Assessment.
-Survey Approach
-Key Informant Approach
-Public Forum Approach
Ben Yep, Extension Sociologist
Sociology Department,
Iowa State University
Ames

12:00 - 12:45: Lunch

12:45 - 1:00: A Final Look at Citizen Involvement: The Decision-Maker's Perspective.
Frank Fear
Sociology Department,
Iowa State University
Ames

1:00 - 2:45: Looking at Needs Assessment Using the Social Indicator Approach.

Social Indicators Defined. A Social Report for Calhoun County.
-How the report was developed
-Some findings from the report
-Using the report in needs assessment.
Keith Carter
Erik Andersen
Chris Marshall
Sociology Department,
Iowa State University
Ames

2:45 - 3:00: Sources of Assistance Beyond the Workshop.
-Kinds of assistance offered
-Who to contact
Clarence E. Rice
Area Extension Office
Fort Dodge

3:00 - 3:15: Evaluation

3:15 - 3:30: Open Discussion

3:30: Adjourn

No. _____

# NEEDS-ASSESSMENT AND CITIZEN INPUT: WHERE DO YOU STAND?

A series of 10 statements appear on this worksheet. We would like you to read each statement and select the response option below each statement which best "sums up" your feelings about the statement. Simply place a checkmark in the blank next to the option which best describes your feelings. Your answers will remain confidential.

We'll talk about how to score the statements and what the total score for the 10 statements means later in the conference.

1. I believe citizens <u>can</u> comprehend and understand the problems I face as a decision maker.

   (a) _____ Strongly disagree
   (b) _____ Disagree
   (c) _____ Agree
   (d) _____ Strongly agree

2. I have confidence in the <u>ability of citizens</u> to make complex decisions similar to the ones I make as a decision maker.

   (a) _____ I have <u>no</u> confidence.
   (b) _____ I have <u>limited</u> confidence.
   (c) _____ I have <u>substantial</u> but <u>not complete</u> confidence.
   (d) _____ I have <u>complete</u> confidence.

3. I believe that most citizens are generally <u>very concerned</u> about the affairs of local government.

   (a) _____ Strongly disagree
   (b) _____ Disagree
   (c) _____ Agree
   (d) _____ Strongly agree

4. Citizen input is a <u>valuable source of information</u> to be used in the decision making process.

   (a) _____ Strongly agree
   (b) _____ Agree
   (c) _____ Disagree
   (d) _____ Strongly disagree

(OVER PLEASE)

Total Score ☐

5. I believe citizens' involvement in decision making is critical since it promotes a feeling of trust in elected and appointed decision makers.

(a) _____ Strongly agree
(b) _____ Agree
(c) _____ Disagree
(d) _____ Strongly disagree

☐

6. I think citizen involvement in the decision making process takes too much time.

(a) _____ Strongly disagree
(b) _____ Disagree
(c) _____ Agree
(d) _____ Strongly agree

☐

7. In solving community (or county) problems:

(a) _____ I usually try to get ideas and opinions of citizens.
(b) _____ I sometimes try to get ideas and opinions of citizens.
(c) _____ I always try to get ideas and opinions of citizens.
(d) _____ I rarely try to get ideas and opinions of citizens.

☐

8. The amount of time I spend with citizens discussing community (or county) problems can be characterized as:

(a) _____ A moderate amount of time
(b) _____ Very little time
(c) _____ A great amount of time
(d) _____ No time at all

☐

9. In setting or ordering goals for the community (county), I involve citizens:

(a) _____ Not at all
(b) _____ Very little
(c) _____ A moderate amount
(d) _____ A great deal

☐

10. I allow citizens to influence my decisions:

(a) _____ A great deal
(b) _____ A moderate amount
(c) _____ Very little
(d) _____ Not at all

☐

*Planning for a Better Tomorrow in Humboldt County*

NO. _____

# EVALUATION OF CONFERENCE

One of the best ways to effectively plan for future conferences is to have participants--such as yourself--tell us how you feel about what this conference had to offer. With this in mind, we would like you to answer several questions that will give us an idea of what you see as the strengths and weaknesses of the conference.

Please indicate the extent to which you agree or disagree with each of the following statements by circling the response option which best expresses your feelings.

The response options are:

STRONGLY AGREE
AGREE
SOMEWHAT AGREE
UNDECIDED
SOMEWHAT DISAGREE
DISAGREE
STRONGLY DISAGREE

Thank you.

1. The conference was well-organized.

Strongly Agree | Agree | Somewhat Agree | Undecided | Somewhat Disagree | Disagree | Strongly Disagree

2. The purposes of the conference were never clearly specified.

Strongly Agree | Agree | Somewhat Agree | Undecided | Somewhat Disagree | Disagree | Strongly Disagree

3. The length of the conference was just about right.

| Strongly Agree | Agree | Somewhat Agree | Undecided | Somewhat Disagree | Disagree | Strongly Disagree |
|---|---|---|---|---|---|---|

(If you have circled the options *Somewhat Disagree*, *Disagree*, or *Strongly Disagree*, please checkmark one of the following:

The conference was:

_____ too long.

_____ too short.)

4. The various segments of the conference seemed to be unrelated to each other.

| Strongly Agree | Agree | Somewhat Agree | Undecided | Somewhat Disagree | Disagree | Strongly Disagree |
|---|---|---|---|---|---|---|

5. The material presented during the conference was presented in an understandable way.

| Strongly Agree | Agree | Somewhat Agree | Undecided | Somewhat Disagree | Disagree | Strongly Disagree |
|---|---|---|---|---|---|---|

6. Too much material was presented during the conference.

| Strongly Agree | Agree | Somewhat Agree | Undecided | Somewhat Disagree | Disagree | Strongly Disagree |
|---|---|---|---|---|---|---|

7. The amount of time reserved for audience discussion was just about right.

| Strongly Agree | Agree | Somewhat Agree | Undecided | Somewhat Disagree | Disagree | Strongly Disagree |
|---|---|---|---|---|---|---|

8. Some of the conference material was too abstract.

| Strongly Agree | Agree | Somewhat Agree | Undecided | Somewhat Disagree | Disagree | Strongly Disagree |
|---|---|---|---|---|---|---|

(If you have circled *Strongly Agree*, *Agree*, or *Somewhat Agree*, please specify what material you felt was too abstract:

_____

_____

_____

_____.)

9. Completing the 10 statements on citizen involvement (Where do I stand?) offered a good learning experience.

| Strongly Agree | Agree | Somewhat Agree | Undecided | Somewhat Disagree | Disagree | Strongly Disagree |
|---|---|---|---|---|---|---|

10. The time spent discussing the involvement of citizens in the planning process offered a good learning experience.

| Strongly Agree | Agree | Somewhat Agree | Undecided | Somewhat Disagree | Disagree | Strongly Disagree |
|---|---|---|---|---|---|---|

11. The segment where the survey, key informant, and public forum approaches were discussed offered a good learning experience.

| Strongly Agree | Agree | Somewhat Agree | Undecided | Somewhat Disagree | Disagree | Strongly Disagree |
|---|---|---|---|---|---|---|

12. The amount of time devoted to discussing the survey, key informant, and public forum approaches was just about right.

| Strongly Agree | Agree | Somewhat Agree | Undecided | Somewhat Disagree | Disagree | Strongly Disagree |
|---|---|---|---|---|---|---|

(If you have circled *Somewhat Disagree*, *Disagree*, or *Strongly Disagree*, please checkmark one of the following:

____ Delete the discussion of these approaches from future conferences.

____ More time should be spent discussing these approaches in future conferences.

13. The social indicator approach is nothing different from what I have been doing in the past.

| Strongly Agree | Agree | Somewhat Agree | Undecided | Somewhat Disagree | Disagree | Strongly Disagree |
|---|---|---|---|---|---|---|

14. The audio/visual segment of the program offered a good learning experience.

| Strongly Agree | Agree | Somewhat Agree | Undecided | Somewhat Disagree | Disagree | Strongly Disagree |
|---|---|---|---|---|---|---|

(If you circled *Strongly Agree*, *Agree*, or *Somewhat Agree*, please explain why you feel this way:

_____

_____

_____

_____.)

15. The "three step" approach for using social indicator data for needs-assessment was confusing to me.

| Strongly Agree | Agree | Somewhat Agree | Undecided | Somewhat Disagree | Disagree | Strongly Disagree |
|---|---|---|---|---|---|---|

(If you circled *Strongly Agree*, *Agree*, or *Somewhat Agree*, please explain why you feel this way:

_____

_____

_____

_____.)

16. The Social Report distributed during the conference looks like a useful document for planning purposes.

| Strongly Agree | Agree | Somewhat Agree | Undecided | Somewhat Disagree | Disagree | Strongly Disagree |
|---|---|---|---|---|---|---|

Please explain why you feel this way:

_____

_____

_____

_____.

17. I would encourage decision makers in other counties to attend a conference like this one.

| Strongly Agree | Agree | Somewhat Agree | Undecided | Somewhat Disagree | Disagree | Strongly Disagree |
|---|---|---|---|---|---|---|

18. The general public should be encouraged to attend a conference like this one.

| Strongly Agree | Agree | Somewhat Agree | Undecided | Somewhat Disagree | Disagree | Strongly Disagree |
|---|---|---|---|---|---|---|

19. The ISU-USDA Cooperative Extension Service is a good organization to turn to if you need help solving a problem encountered during the planning process.

| Strongly Agree | Agree | Somewhat Agree | Undecided | Somewhat Disagree | Disagree | Strongly Disagree |
|---|---|---|---|---|---|---|

20. Decision makers need to learn how to get effective citizen participation in the planning process.

| Strongly Agree | Agree | Somewhat Agree | Undecided | Somewhat Disagree | Disagree | Strongly Disagree |
|---|---|---|---|---|---|---|

We would like to ask you three final questions.

21. If you plan to use the Social Report for planning purposes in the future, how do you plan to use it? If you do not plan to use the report, go to question #22.

_____

_____

_____

_____

22. With regard to the assistance offered by the research-extension staff beyond the conference, I:

_____ Probably will not seek assistance.

_____ Probably will seek assistance.

_____ Am not sure whether I will seek assistance.

23. Some people feel the Cooperative Extension Service can often provide help in solving problems encountered during the planning process. In the past, I have:

_____ Never contacted the Cooperative Extension Service for help.

_____ Occasionally contacted the Cooperative Extension Service for help.

_____ Frequently contacted the Cooperative Extension Service for help.

Any additional comments will be appreciated.

Thank you.

# APPENDIX D

## AGENDA FOR COUNTY CONFERENCES

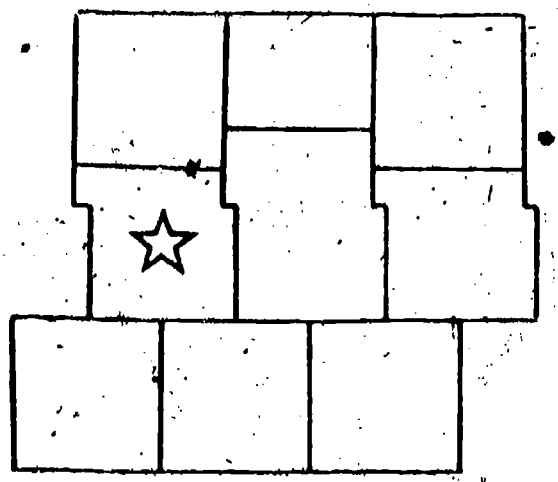
## PART B

## CONFERENCE WORKBOOK

# CONFERENCE

# FOR A BETTER TOMORROW

# IN CALHOUN COUNTY



## CONFERENCE WORKBOOK


Prepared by: Frank Fear, Chris Marshall, Keith Carter, Erik Andersen

In Cooperation with: John Tait, Ben Yep, and Clarence Rice
ISU-USDA Cooperative Extension Service

SOCIOLOGICAL STUDIES IN SOCIAL INDICATORS
Program Co-Directors: Gerald E. Klonglan, Richard D. Warren, and George M. Beal
Project Coordinator: Frank A. Fear (Agriculture and Home Economics Experiment Station Project 2142, Iowa State University)

DEPARTMENT OF SOCIOLOGY AND ANTHROPOLOGY ..... IOWA STATE UNIVERSITY of Science and Technology, Ames, Iowa 50011



Sociology Report No. 133B

November, 1977

SEGMENT 1

# AN OVERVIEW

# OF THE

# NEEDS-ASSESSMENT PROCESS

## TABLE OF CONTENTS



All the materials used during today's conference were made available through funds provided by Title V of the Rural Development Act of 1972.



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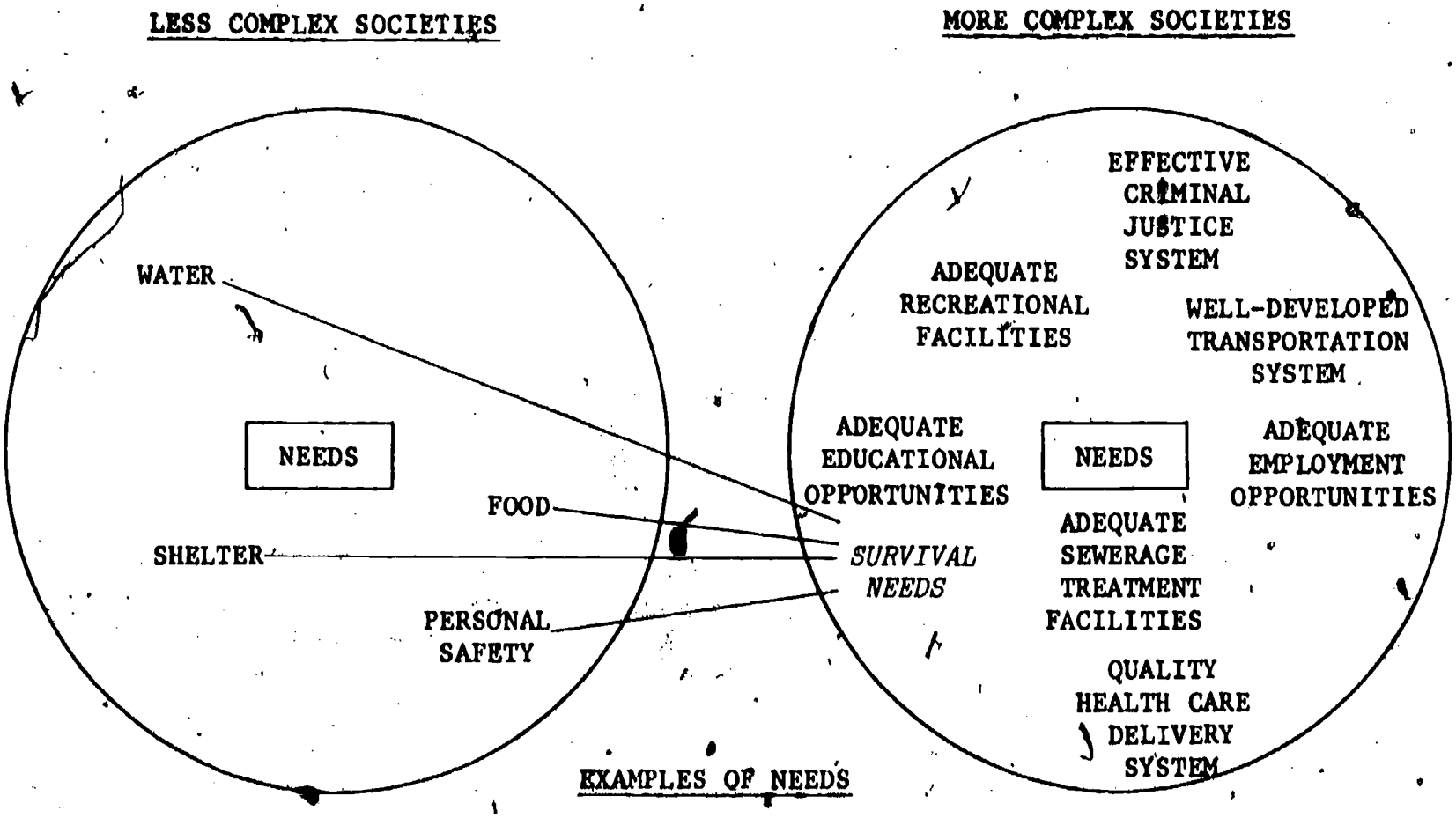
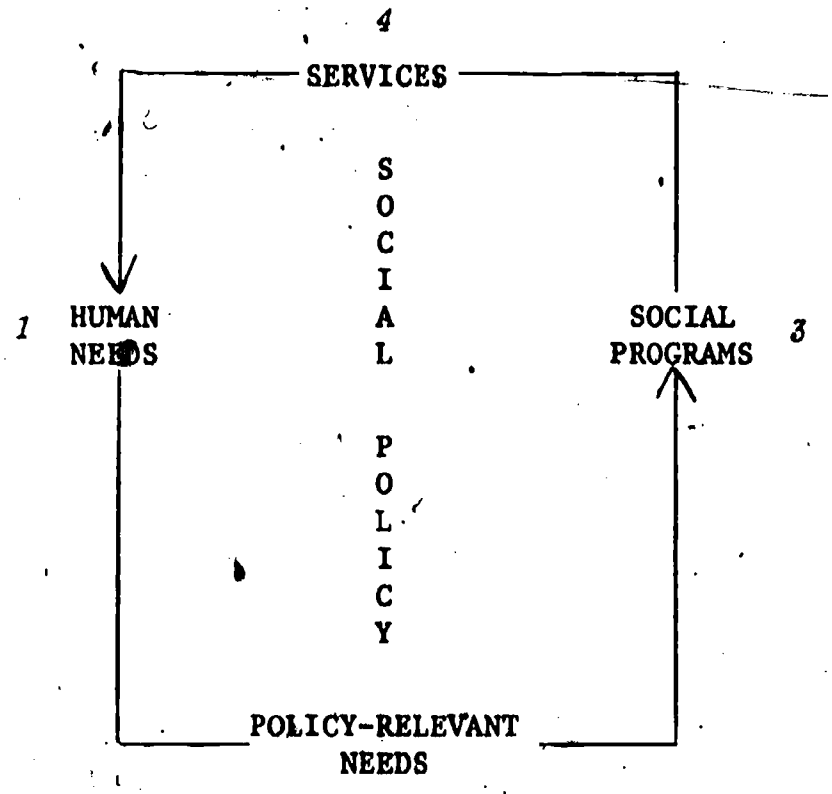
# THE IMPORTANCE OF HUMAN NEEDS IN THE POLICYMAKING PROCESS

A Basic Feature of the Human Condition: People have a variety of *needs* which must be satisfied if they are to improve their level of living.




Key Consideration: As societies grow in size and become more complex in nature, individuals are less able, on an *individual basis*, to meet their diversified needs. In other words, as persons seek to raise their level of living, they depend more and more upon *services* provided to them by other persons.

Elected and appointed officials are given the responsibility of providing services which help individuals satisfy their needs. *Government* is often viewed as performing the primary function of helping people meet needs.




So in a very real way, the *initial step* in formulating a program is to *establish the need* for services, whether these services involve housing units for low-income families or construction of a new sewer system. And prior to the allocation of dollars for services, decision makers are often required to *demonstrate* and *document* the need for these services.

# DEFINING NEEDS-ASSESSMENT

What is needs-assessment?

Let's take a few minutes to *define* needs-assessment. Gather in a small group (3 or 4 persons). Conduct a brief "brainstorming" session and try to arrive at a consensus definition of needs-assessment. What are the *key words* (central ideas) conveyed in your definition and the group definition? What key words are included in the definitions developed by other people?

Your definition:

Other definitions: 1.

2.

# ONE DEFINITION OF NEEDS-ASSESSMENT

NEEDS-ASSESSMENT IS:

THE *SYSTEMATIC PROCESS* WHEREBY *policy-relevant needs* ARE *documented.*

KEY WORDS IN DEFINITION:

| | |
|---|---|
| SYSTEMATIC | Because it should reflect an *organized* and *methodical* approach. |
| PROCESS | Because it should follow a *clearly* defined set of *steps* or *stages*. |
| POLICY-RELEVANT NEEDS | Because it should focus on uncovering needs we can do something about more or less directly through *social policy*. |
| DOCUMENTED | Because there should be *logical* and *objectively* defensible reasons why needs are identified as needs. |

# THE PLACE OF NEEDS-ASSESSMENT IN THE PLANNING PROCESS

What is planning?

Planning is the *process* of *delineating* a proposed *schedule of activities and endeavors* based upon *careful scrutiny and interpretation* of the existing *situation.*

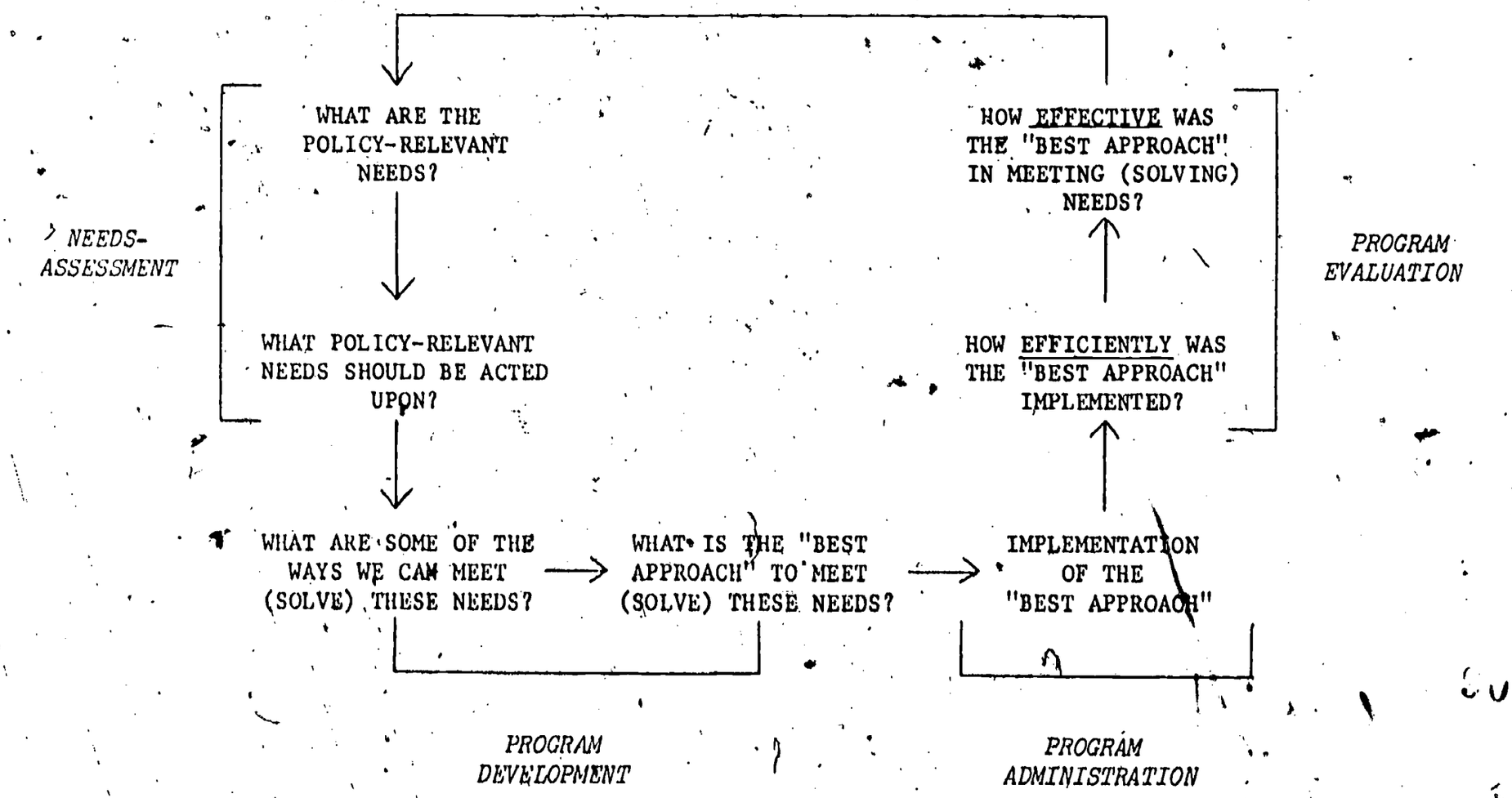
(From: MIDAS COG Brochure)

What are the central phases or stages of the planning process?

A Simplified Model

| | |
|---|---|
| Phase 1 | Needs-Assessment |
| Phase 2 | Program Development |
| Phase 3 | Program Administration |
| Phase 4 | Program Evaluation |

# SIMPLIFIED OVERVIEW OF THE PLANNING PROCESS



## HOW VALUABLE IS CITIZEN INPUT FOR NEEDS-ASSESSMENT?

In your own mind (perhaps based upon experiences you have had), what are some of the *advantages* (pros) and *disadvantages* (cons) of having citizens involved during the needs-assessment process?

| PROS | CONS |
|---|---|
| 1. Citizens have a good grasp of what the real needs are. | 1. It is too time consuming to work with citizens during the planning process. |
| 2. | 2. |
| 3. | 3. |
| 4. | 4. |
| 5. | 5. |

# WHAT ARE SOME OF THE "DON'TS" WHICH WORK AGAINST EFFECTIVE CITIZEN INVOLVEMENT?

As you see it (perhaps based upon experiences you have had), what are some things to *avoid* (approaches or strategies to avoid) when working with citizens during the planning process (particularly during the needs-assessment phase)?

1. Citizens untrained in sampling techniques and survey methodology "poll" other citizens "on the issues."

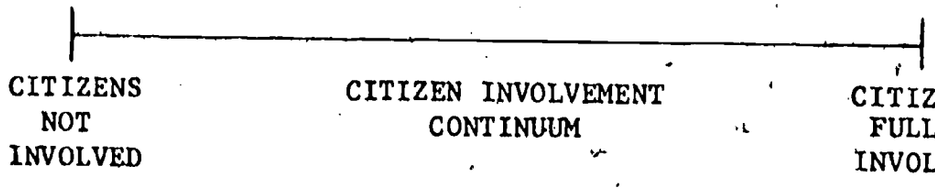
2.

3.

4.

5.

# FOUR DIFFERENT WAYS DECISION MAKERS OFTEN VIEW THE ROLE OF CITIZENS IN THE NEEDS-ASSESSMENT PROCESS




The 4 approaches vary on the above continuum:

1. Non-Involvement Approach -- Decision makers do not actively seek or use citizen input and involvement. (e.g., Location of a new superhighway in "Smithton.")

2. Approval-Seeking Approach -- Citizens respond to (evaluate) proposals generated by decision makers. (e.g. Land use in "Oakfield.")

3. Advisory Approach -- Citizens serve as advisors (may sit on advisory boards). Citizens also serve as counselors. (e.g., The water shortage in "Cosgrove.")

4. Participatory Approach -- Decision makers give citizens the power to draft proposals of need. Citizens have the responsibility of specifying what needs should be attacked through programs. The citizens become "decision makers." (e.g., Combating juvenile delinquency in "Bear Creek.")

SOME PROS AND CONS

OF THE

*NON-INVOLVEMENT APPROACH* TO CITIZEN INVOLVEMENT

**Decision makers do not actively seek or use citizen input and involvement.**

| PROS | CONS |
|---|---|
| 1. Perhaps citizens do not have the expertise to know what the needs really are. | 1. Elected and/or appointed officials may never be truly aware of what citizens feel the real problems and needs are. |
| 2. Makes for more efficient decision making because citizens do not drain the time and resources of decision makers. | 2. There is a decreased likelihood that eventual programs will be widely accepted if citizens do not have some say in the planning process. |
| 3. Decisions are made that are good for the whole community (county), not just for those who may have vested interests in seeing that certain programs are initiated, maintained, or terminated. | 3. There is a good chance citizens will become apathetic due to lack of involvement. |
| 4. Decisions should be made by decision makers, not the public. Decision makers were elected or appointed to carry out specific responsibilities. | |

SOME PROS AND CONS

OF THE

*APPROVAL-SEEKING APPROACH* TO CITIZEN INVOLVEMENT

**Citizens respond to (evaulate) proposals generated by decision makers.**

---

| PROS | CONS |
|---|---|
| 1. The presence of a citizen group may positively affect the perceptions of the public and result in a feeling that their views "count." | 1. This approach does not really take advantage of the potential offered by citizen input. |
| 2. Decision makers often can count on the citizen group to support eventual programs. | 2. There is a question whether citizens and officials ever develop a good rapport so as to be able to understand each other. |
| 3. Citizens are unlikely to take up much valuable staff time. | 3. The involved citizens may be viewed by other citizens as "tools" of elected or appointed officials. |

---

SOME PROS AND CONS

OF THE

*ADVISORY APPROACH* TO CITIZEN INVOLVEMENT

**Citizens serve as advisors. Citizens also serve as counselors.**

---

PROS

1. Local officials can begin to really take advantage of citizen interest.

2. Citizens begin to feel they can influence policy.

3. Better and more representative policies may occur as a result of citizen's groups providing continuing input to decision makers.

4. Helps create an atmosphere of trust between the public and decision makers because citizens can begin to "dialogue" with decision makers as policy is developed.

5. Should promote the receptivity of ideas generated by citizens on the part of decision makers and vice versa.

CONS

1. Increased demands made by citizens on elected and/or appointed officials may result in inefficient decision making.

2. Some citizens (not serving in an advisory capacity) may view the involved citizens as unrepresentative of the general public.

3. Officials may be accused of delegating personal responsibilities to citizens.

---

SOME PROS AND CONS

OF THE

*PARTICIPATORY APPROACH* TO CITIZEN INVOLVEMENT

**Decision makers give citizens the power to draft proposals of need. Citizens have the responsibility of specifying what needs should be attached through programs. The citizens become decision makers.**

---

PROS

1. Final decisions leading to plans and programs might be better received on the part of the general public because residents of the community (county) were intimately involved in the planning process.

2. The citizen's group should be a source of great support for decision makers.

3. Reaffirms the idea that decision makers are responsive to the ideas of citizens.

4. Often helps create civic pride and an increased sense of community because of the "joint" action of decision makers and citizens to solve problems.

CONS

1. Increased costs and staff time may contribute to inefficient decision making.

2. Involved citizens may be viewed by others as a "lobby group."

3. If involved citizens are irresponsible and/or ill-informed, their contribution to officials may be of little value.





10

D-30

SEGMENT 2

THREE

SYSTEMATIC APPROACHES

TO

NEEDS-ASSESSMENT

## TECHNIQUE 1

*THE ATTITUDE SURVEY APPROACH:* WHAT DOES IT INVOLVE?

**Purpose:** To elicit information from a wide range of community residents concerning issues pertaining to their well-being via their responses to specific questions included in an interview schedule or questionnaire.

**Approach:** Information (data) is gathered through the means of a carefully developed instrument administered to individuals identified via a sampling procedure.

**Basic Requirements:** At least some training or experience in the construction of survey instruments is recommended.

At least some training or experience in sampling techniques is recommended.

**Some Types of Surveys:** Personal (face-to-face) interviews

Telephone interviews

Mailed questionnaires

**Examples:** A good example of a well-designed survey using the mailed questionnaire approach is the study undertaken by Dr. Willis Goudy as part of the Iowa Title V program.

## TECHNIQUE 1

## ADVANTAGES AND DISADVANTAGES OF THE ATTITUDE SURVEY APPROACH

| ADVANTAGES | DISADVANTAGES |
|---|---|
| 1. Perhaps the best approach for eliciting the attitudes of a broad range of individuals. | 1. This approach is often the most costly of all approches. |
| 2. The data obtained is usually valid and reliable. | 2. Individuals are often hesitant to answer questions. Individuals who do answer questions often answer them in the most desirable way (i.e., perhaps their answers represent what they think the authors of the survey want to hear, not necessarily how the respondents really feel. This is a particular problem with interviews.) |
| 3. Elicits information from individuals who may be the recipients of services initiated as a result of the findings. It therefore elicits information from individuals who are usually in a good position to critique present services. | 3. Surveys are often "one shot" affairs. For example, persons responding to a health needs survey in 1975 may not be resurveyed in 1976, 1977, etc. |
| 4. Responding to survey questions often gives individuals a feeling they have a voice in the planning process. | 4. Individuals' attitudes can change rapidly. Attitudes can change due to a variety of "intervening factors" (e.g., popularity of President Nixon in November, 1972 and popularity in the spring of 1973). |
| 5. An excellent technique to use in conjunction with other systematic needs-assessment techniques. | |

## TECHNIQUE 2

*THE KEY INFORMANT APPROACH:* WHAT DOES IT INVOLVE?

**Purpose:** To elicit information from those community residents who, because of their professional training and/or affiliation with particular organizations, agencies, or associations, are in a prime position to know what the needs facing the community are likely to be.

**Approach:** A brief interview schedule or questionnaire is developed by one or more sponsoring organizations, agencies, or associations, and administered to community residents identified as "*key informants.*" The data derived from these schedules can be used by the sponsoring group to obtain a more comprehensive viewpoint of what the needs facing the public are. After the data from the questionnaires or interviews are collected and organized, the sponsoring group may want to "feed back" the findings of the survey to the key informants who participated. In this way, the sponsoring group may obtain additional insights into public needs.

**Types of key informants:**

Elected officials (e.g., mayors, councilpersons, etc.)

Key persons in institutional areas of the community (religious leaders, bankers, public safety officials, school administrators, hospital administrators, etc.)

Agency administrators (e.g., social service department)

Leaders of public service organizations (e.g., Chamber of Commerce, American Cancer Society, etc.)

Professionals in specific service areas (e.g., physicians, lawyers, school faculty, etc.)

**How to implement the Key Informant Approach:**

(A synopsis)

1. Compile a list of "key informants" by name.
2. Decide how you want to elicit information from these key informants--via questionnaires or interviews (perhaps both).
3. Construct a brief questionnaire and/or interview schedule which can be used to obtain the information you need.
4. Gather data. (Discussed below)
5. Organize data.
6. Interpret data. (Discussed on p. 9)
7. Schedule a meeting with your key informants. Present the findings of your study to them. Compare your interpretations of the data to their interpretations of the data.

---

**How to develop the data collection instrument:**

(A synopsis)

The instrument should consist of at least 4 types of questions:

1. Background information on the respondent.
2. Perceptions (attitudes) concerning the well-being of the public pertaining to the specific issue(s) at hand (e.g., mental health).
3. Perceptions (attitudes) concerning <u>what is currently being done</u> about meeting <u>these needs</u>.
4. Ideas as to <u>what should be done</u> about meeting needs that are not currently being met.

KEY INFORMANT APPROACH--continued

How to interpret the data:

(A synopsis)

1. Since the data were obtained for specific reasons, the data should be organized for analysis in the same manner. That is, the responses of the key informants should be organized in terms of what they think the important needs are, what is currently being done (if anything) to meet these needs, and what (if anything) should be done to meet needs not currently being met.

2. Analyze the data from a "vested interest" perspective. In other words, ask yourself:

   --Are the needs identified by the key informants the same as what my organization, agency, or association considers as needs?

   --What is my organization, agency, or association doing to meet these needs?

   --What can my organization, agency, or association do that we are not presently doing to help meet identified needs?

3. Schedule a group meeting with all the key informants and "feed back" the findings as organized in #1 above. Compare their interpretations with the ones you've arrived at by going through the process outlined in #2 above.

## TECHNIQUE 2

## ADVANTAGES AND DISADVANTAGES OF THE KEY INFORMANT APPROACH

| ADVANTAGES | DISADVANTAGES |
|---|---|
| 1. Offers one of the easiest and least expensive ways to systematically assess needs. | 1. The information derived from this technique may represent a "biased perspective": information is typically elicited from "providers of services" (as opposed to the "consumers" of services). |
| 2. May help initiate (or strengthen) the lines of communication among service organizations, agencies, and associations. | 2. The information derived from key informants often represents the perspectives (and biases) of the organization, agencies, and associations with which these informants are associated. |
| 3. Discussion of the findings with the key informants promotes insights for all concerned. | 3. A group meeting held to "feed back" the findings of the study to the key informants may only work to rigidify a "provider" bias in terms of clarifying what the real needs are. |
| 4. The data collection instruments are usually easier to construct than those associated with the Attitude Survey Approach. | 4. Some of the weaknesses associated with the Attitude Survey also apply to the Key Informant Approach where persons are also asked to complete questionnaires or respond to interviews. |

## TECHNIQUE 3

### *THE PUBLIC FORUM APPROACH:* WHAT DOES IT INVOLVE?

**Purpose:** To elicit information from a wide range of community residents concerning issues pertaining to their well-being and perceived needs via group discussions taking place at a series of public meetings.

**Approach:** One or more organizations, agencies, or associations sponsor a series of public meetings (forums) during which time the participants discuss what some of the needs facing the community are, what some of the priority needs are, and what can be done about these priority needs.

**Who should attend forums?:** Open invitation (encourage all members of the community to attend)

Special invitation to "key informants," such as those types previously considered under the Key Informant Approach

**How to implement the Public Forum Approach:**

1. Develop a list of discussion questions that will serve as the basis for group discussion. Start the process of preparing the discussion questions by thinking very broadly. Such questions as:

   What are the most important needs facing our community?

   Why are these important needs?

   What have we done to help meet these needs in the past?

   Where have we failed in the past in our attempt to meet these needs?

   are broad enough, yet pertinent, so that most community residents (and those participating at the forums) should feel free to address the issues without too much difficulty.

2. Select a strategically located place for the initial meeting. Try to select a meeting place that you feel will be conducive to the open interchange of ideas. Large assembly halls, for example, are not usually the most appropriate settings for open discussion. Also, select a site that is geographically and socially acceptable to all segments of the population.

3. Publicize the purpose, date, and place at which the forum will be held. Use the media as much as possible.

4. The group sponsoring the initial forum should take the initiative in conducting the first meeting. A person representing the group should be responsible for communicating the purpose of the forum to those present and what the meeting hopes to accomplish. Another person representing the sponsoring group should be responsible for recording the ideas and suggestions of those present at the meeting.

5. After stating the purpose, objective, and "ground rules" for the initial forum, the discussion leader should pose the questions prepared in advance to the audience. Encourage the open discussion and interchange of ideas.

6. If the participants are on the right track, you'll find that recommendations for topics to consider and/or directions to consider for the next meeting will "come from the floor." Whether or not this occurs, the convener should make sure an "ad hoc" committee of participants is organized to plan for the next meeting.

7. Make sure the recorder gets the names of all the participants so they may be personally contacted prior to the next forum.

8. Recognize that unlike the other needs-assessment approaches discussed thus far, you'll probably need to "play it by ear" more with the Public Forum Approach. Be well prepared for the initial meeting. Then let the participants join with you in planning for future meetings. Your goal is to learn from them by permitting them to get involved in the needs-assessment process. And the Public Forum Approach really is a process, not a "one shot" affair.

## TECHNIQUE 3

## ADVANTAGES AND DISADVANTAGES OF THE PUBLIC FORUM APPROACH

### ADVANTAGES

1. Offers a good way to elicit opinions from a wide range of the citizenry (like the Attitude Survey Approach).
2. Provides an opportunity for citizens to actively participate in the needs-assessment process (usually to a greater degree than via the Attitude Survey Approach).
3. Participants in the forums may offer able assistance to decision makers after the needs-assessment process is completed.
4. Often contributes to enhancing the lines of communication between the "providers" and "consumers" of services.
5. Perhaps the least expensive of all the systematic needs-assessment approaches. It is also one of the easiest to implement.

### DISADVANTAGES

1. The burden will be squarely on the sponsoring organizations, agencies, or associations as to encourage participation.
2. Participants in the forums may actually represent a variety of "vested interest" groups.
3. Participants in forums may use the sessions as a vehicle to publicize their grievances ("gripes") about the sponsoring group.
4. The forums may bring about unrealistic expectations in the minds of the participants in terms of what "providers" can do to help meet needs.

D-40

SEGMENT 3

LOOKING AT NEEDS-ASSESSMENT
USING THE
SOCIAL INDICATORS APPROACH

## TECHNIQUE 4

## THE SOCIAL INDICATOR APPROACH: WHAT DOES IT INVOLVE?

**Purpose:**

To obtain insights about the well-being of people through the analysis of non-attitudinal statistical data.

**Approach:**

The organization(s), agency(ies), or association(s) engaged in the needs-assessment process, look(s) to available statistical data as the source of information. These data may come from such sources as the U.S. Census or reports of state agencies. An attempt is usually made to identify key variables (e.g., mean (average) family income) that have information value from a needs-assessment perspective (i.e., data pertaining to these variables can tell you something about the well-being of people). It is desirable that the data for these variables represent more than one point in time (e.g., mean family income in 1960 and 1970) so that some evaluation can be made about the changing nature of well-being.

**How to implement the Social Indicator Approach:**

It is often a very difficult and time-consuming process to collect the types of non-attitudinal statistical data which are useful for needs-assessment.

- IN ORDER TO FACILITATE THE IMPLEMENTATION OF THE SOCIAL INDICATOR APPROACH FOR NEEDS-ASSESSMENT, THE RESEARCH STAFF HAS PREPARED A SOCIAL REPORT FOR YOUR COUNTY.

This report includes a wide variety of non-attitudinal statistical data that you may want to use for needs-assessment.

Before we circulate the report, however, let's take some time to consider an important question: What types of things about well-being should the data in the report cover?

The research staff spent a considerable amount of time considering this question. The data in the report should measure important things about the well-being of people in your county. But what things?

Let's have a little fun as we try to answer this question by listening to, and watching, a brief audio-visual program. The topics covered in the program are pertinent because they relate to the material included in the Social Report.

# OVERVIEW OF THE SOCIAL REPORT

Please turn to Chapter 1 of the Social Report.

Listed below are some of the important issues you should be aware of before the data in the report are used for planning purposes. The issues are discussed in Chapter 1. We shall briefly discuss these issues with you today.

1. The *areas of well-being* for which data are presented.
2. The *areas of the resource base* for which data are presented.
3. How the *data are organized*.
4. How the *data are presented* (table designs).
5. *Limitations* (weaknesses) of the report.

D-241

# HOW TO IMPLEMENT THE SOCIAL INDICATOR APPROACH FOR NEEDS-ASSESSMENT:

## A THREE STEP PROCESS

---

STEP 1

1. In what *area of well-being* are you concerned (for example, health)?

2. What is your *specific focus of interest within that area* (for example, the need for additional medical services)?

3. *What would you like to know about your county* to help you decide (or assess) whether this need exists? Depending on the issue under scrutiny, you may want to focus your interest on:

   --The resource base (for example, the population composition by age)

   --The level of well-being (for example, death by causes)

   --Available (existing) services (for example, the number of hospital beds, number of doctors) and utilization of services (for example, the number of hospital admissions, number of patients served)

   --Financial resources (for example, dollars allocated by the county government for health)

4. *Refer to the Social Report.* The first page of Chapters 2-12 presents a list of the indicators included in the respective chapter. For example, if your area of concern is health, you'll want to turn to the first page of the Health Chapter (p. 152) and look specifically at the indicators included in that chapter.

5. *Make a list of the page numbers* where you have found social indicator data which may be used to measure what you want to know about your county.

STEP 2

1. *Write out the title of the table* for each indicator you have selected in #5 of Step 1.

2. For each indicator, *pull the appropriate data out of the report.* Organize the raw data and percent change data for each indicator.

3. What are your findings? *Make an assessment* of what the data seem to be suggesting. Pay particular attention to:

   --The conditions that the data describe

   --The direction of change (Are things getting better or worse?)

   --The intensity of change (How much better or worse do things appear to be?)

   --How your county compares with the multicounty region and/or state in terms of conditions and changes in conditions.

STEP 3

1. *Make a list of the findings* you derived from the analysis of data (from #3 of Step 2).

2. *Look at all the findings* from a comprehensive perspective. Write down what your overall interpretations of these findings (for example: Do we need more doctors or do we need a larger hospital?).

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PRACTICING THE SOCIAL INDICATOR APPROACH FOR NEEDS-ASSESSMENT

STEP 1

AREA OF WELL-BEING

SPECIFIC FOCUS WITHIN AREA

| FIRST: WHAT DO YOU WANT TO KNOW? | THEN: PAGE IN REPORT WHERE APPROPRIATE SOCIAL INDICATOR DATA ARE PUBLISHED |
|---|---|
| ABOUT THE RESOURCE BASE | MEASURING THE RESOURCE BASE |
| ABOUT THE LEVEL OF WELL-BEING | MEASURING THE LEVEL OF WELL-BEING |

(STEP 1--continued)

ABOUT AVAILABLE SERVICES

MEASURING AVAILABLE SERVICES

ABOUT FINANCIAL RESOURCES

MEASURING FINANCIAL RESOURCES

PRACTICING THE SOCIAL INDICATOR APPROACH FOR NEEDS-ASSESSMENT

## STEP 2

| FIRST: SELECTED SOCIAL INDICATORS (FROM STEP 1) | SECOND: DATA FOR THESE SOCIAL INDICATORS | | | | THIRD: FINDINGS |
|---|---|---|---|---|---|
| | | RAW DATA | | % Change (or Change in Proportion) | |
| | Year: | | | | |
| 1. | County: | | | | |
| | State: | | | | |
| | Year: | | | | |
| 2. | County: | | | | |
| | State: | | | | |
| | Year: | | | | |
| 3. | County: | | | | |
| | State: | | | | |

(STEP 2--continued)

| SELECTED SOCIAL INDICATORS (FROM STEP 1) | | DATA FOR THESE SOCIAL INDICATORS | | | FINDINGS |
|---|---|---|---|---|---|
| | | RAW DATA | | % Change (or Change in Proportion) | |
| 4. | Year: | | | | |
| | County: | | | | |
| | State: | | | | |
| 5. | Year: | | | | |
| | County: | | | | |
| | State: | | | | |
| 6. | Year: | | | | |
| | County: | | | | |
| | State: | | | | |
| 7. | Year: | | | | |
| | County: | | | | |
| | State: | | | | |
| 8. | Year: | | | | |
| | County: | | | | |
| | State: | | | | |

D-49

# PRACTICING THE SOCIAL INDICATOR APPROACH FOR NEEDS-ASSESSMENT

## STEP 3

**FIRST: FINDINGS (FROM STEP 2)**

**THEN: OVERALL INTERPRETATIONS**

1.

2.

3.

(STEP 3--continued)

| FINDINGS (FROM STEP 2) | OVERALL INTERPRETATIONS |
| --- | --- |
| 4. | |
| 5. | |
| 6. | |
| 7. | |
| 8. | |

# ADVANTAGES AND DISADVANTAGES OF THE SOCIAL INDICATOR APPROACH

## ADVANTAGES

1. Needs-assessment performed via the Social Indicator Approach can be relatively quickly performed.

2. The Social Indicator Approach makes good use of already existing statistical data.

3. Social indicator data offers a good basis for public enlightenment and discussion.

4. The Social Indicator Approach offers one of the easiest ways to monitor well-being (i.e., chart well-being over time).

5. The Social Indicator Approach offers one of the best ways to compare the level of well-being of different geo-political units (e.g., county vs. state).

6. The Social Indicator Approach is a good approach to complement other needs-assessment techniques (e.g., the Key Informant Approach).

7. The Social Indicator Approach can provide non-attitudinal data that can be compared with attitudinal data (via the Attitude Survey Approach) for needs-assessment purposes.

## DISADVANTAGES

1. What are <u>good</u> indicators and <u>bad</u> indicators?

2. Most of the available data may be relatively dated.

3. Extreme caution must be exercised when merging data from different sources in order to measure the <u>same</u> indicator.

4. One can perform the Social Indicator Approach without ever obtaining the perceptions of what the people think the needs are.

5. Caution must be exercised when interpreting data.

SEGMENT 4

## SOURCES OF ASSISTANCE BEYOND THE WORKSHOP

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Refer to p. 17 of the Social Report. The text on p. 17 describes how you may obtain assistance from the extension-research staff beyond this workshop. The kinds of assistance we can offer include:

1. Clarification or further explanation of the data published in the Social Report.

2. Help in utilizing the data published in the Social Report for needs-assessment purposes.

3. Possible provision of additional social indicator data (not published in the Social Report) that may be useful for assessing needs.

4. Response to ideas or questions you might have concerning how to go about the needs-assessment process.

If you would like to take advantage of any of the kinds of assistance mentioned above, contact your County Extension Director. Mr. Clarence Rice (your Extension Community Resource Development Specialist in Fort Dodge) and/or the Extension-research staff in Ames will respond to your request.

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## APPENDIX

### HOW TO INTERPRET THE TEN STATEMENTS ON CITIZEN PARTICIPATION

1. The statements measure <u>two</u> broad aspects of your orientation toward involving citizens in the decision making process:

| | |
|---|---|
| Statements #1-6 | Measure your *attitudes* concerning the involvement of citizens in the decision making process. |
| Statements #7-10 | Measure your *past behavior* concerning the extent to which you have involved citizens in the decision making process. |

2. <u>Your score for each statement</u> is based on which of the four options you have selected. The options are weighted according to the following format:

   1 = Oriented toward a *low* level of citizen involvement.

   3 = Oriented toward a *moderate* level of citizen involvement.

   5 = Oriented toward a *moderately high* level of citizen involvement.

   7 = Oriented toward a *high* level of citizen involvement.

Your score for each statement is located in the [ ] to the right of each statement.

(Compare to CITIZEN INVOLVEMENT CONTINUUM)

3. <u>Your total (composite) score</u> for the 10 statements can range from:

10 points TO 70 points

Oriented toward a <u>low level</u> of citizen involvement

Oriented toward a <u>high level</u> of citizen involvement

(Compare to CITIZEN INVOLVEMENT CONTINUUM)

4. You can compare your total (composite) score to the total (composite) scores of other persons in the audience. You can base your comparisons on three statistics:

| | |
|---|---|
| RANGE | Where your score "falls" on the distribution of actual scores on the 10-70 point scale. |
| MEAN SCORE | How your total (composite) score compares with the average total (composite) score for all audience members. |
| MEDIAN SCORE | How your total (composite) score compares with the mid-point score for all audience members. |

5. You can compare your score for each statement with how others in the audience responded to each statement by an:

| | |
|---|---|
| ITEM ANALYSIS | What percent of the audience selected each option for each statement? What percent of the audience selected the same option for each statement that you did? |

## REFERENCES

The ideas, approaches, and techniques discussed or reflected in this workbook were drawn from a variety of sources. For a complete listing of the references used as background, see:


Marshall, Chris, Keith Carter, Frank Fear, Rodney Ganey, and Erik Andersen
1978 Needs-Assessment for Social Planning: Approaches and Techniques. Monticello, Illinois: Council of Planning Librarians.


There are, of course, several documents that were more important than others. The following volumes qualify in that category:


Warheit, G. J., R. A. Ball, J. J. Schwab
1975 Planning for Change: Needs-Assessment Approaches. Gainesville, Florida: Department of Psychiatry, University of Florida.

Voland, M. E. and T. N. Hobgood
1975 Social and Economic Indicators for Planning. Raleigh, North Carolina: The North Carolina Agricultural Extension Service.

Mushkatel, A.
1974 Styles of Decisionmaking. Collegeville, Minnesota: Center for the Study of Local Government.

# APPENDIX E

## TABLE OF CONTENTS

## OF

## INITIAL SOCIAL INDICATOR MODELING REPORT

(From: Fear, 1977c:ii-vi)

# TABLE OF CONTENTS

# APPENDIX F

## BIBLIOGRAPHY OF PROJECT OUTPUT

(November, 1976 - September, 1977)

A. General Background Reports


1. Fear, Frank
   1977a "Disseminating social indicator data for local-level decision making: The Iowa State experience." Seminar paper delivered at the Pennsylvania State University (January).

2. Klonglan, Gerald, Richard Warren, Frank Fear, Rodney Ganey, Chris Marshall, and Keith Carter
   1976 Social Indicators for Rural Development: Strategies and Approaches. A Progress Report. Sociology Report No. 132, Department of Sociology and Anthropology, Ames, Iowa: Iowa State University (November).

3. Marshall, Chris, Keith Carter, Frank Fear, Rodney Ganey, and Erik Andersen
   1977 Needs Assessment for Social Planning: Approaches and Ideas. (A Bibliography) Accepted for publication by Council of Planning Librarians (September).

4. Marshall, Chris, Gerald Klonglan, Richard Warren, Keith Carter, Frank Fear, and Rodney Ganey
   1977 "Social indicator research at Iowa State University: Progress and directions." Paper delivered at the annual meeting of the Rural Sociological Society, University of Wisconsin, Madison (August).


B. Social Reports at the Iowa County Level


1. Carter, Keith, Rodney Ganey, Frank Fear, and Chris Marshall
   1977a A Social Report for Humboldt County: Social Indicators for Rural Development. Sociology Report No. 133, Department of Sociology and Anthropology, Ames, Iowa: Iowa State University (March).

2. 1977b A Social Report for Webster County: Social Indicators for Rural Development. Sociology Report No. 134D, Department of Sociology and Anthropology, Ames, Iowa: Iowa State University (Fall).

3. 1977c A Social Report for Greene County: Social Indicators for Rural Development. Sociology Report No. 134H, Department of Sociology and Anthropology, Ames, Iowa: Iowa State University (Fall).

4. Fear, Frank, Chris Marshall, Keith Carter, and Rodney Ganey
1977a A Social Report for Hamilton County: Social Indicators for Rural Development. Sociology Report No. 134B, Department of Sociology and Anthropology, Ames, Iowa: Iowa State University (Fall).

5. 1977b A Social Report for Boone County: Social Indicators for Rural Development. Sociology Report No. 134F, Department of Sociology and Anthropology, Ames, Iowa: Iowa State University (Fall).

6. Ganey, Rodney, Frank Fear, Chris Marshall, and Keith Carter
1977a A Social Report for Calhoun County: Social Indicators for Rural Development. Sociology Report No. 134A, Department of Sociology and Anthropology, Ames, Iowa: Iowa State University (Fall).

7. 1977b A Social Report for Wright County: Social Indicators for Rural Development. Sociology Report No. 134E, Department of Sociology and Anthropology, Ames, Iowa: Iowa State University (Fall).

8. Marshall, Chris, Keith Carter, Rodney Ganey, and Frank Fear
1977a A Social Report for Pocahontas County: Social Indicators for Rural Development. Sociology Report No. 134C, Department of Sociology and Anthropology, Ames, Iowa: Iowa State University (Fall).

9. 1977b A Social Report for Carroll County: Social Indicators for Rural Development. Sociology Report No. 134G, Department of Sociology and Anthropology, Ames, Iowa: Iowa State University (Fall).

C. Conference Workbooks and Discussion Packages

1. Carter, Keith, Chris Marshall, Frank Fear, and Erik Andersen
1977a Conference for a Better Tomorrow in Pocahontas County. Conference Workbook. Sociology Report No. 133D, Department of Sociology and Anthropology, Ames, Iowa: Iowa State University (November).

2. 1977b Conference for a Better Tomorrow in Boone County. Conference Workbook. Sociology Report No. 133G, Department of Sociology and Anthropology, Ames, Iowa: Iowa State University (December).

3. Fear, Frank
1977b What are the needs facing Eagles Grove, Iowa? Data book prepared for the Department of Social Services, The Archdiocese of Dubuque, Iowa (April).

4. Fear, Frank, Chris Marshall, Keith Carter, and Rodney Ganey
1977 Conference for a Better Tomorrow in Humboldt County. Conference Workbook. Sociology Report No. 133A, Department of Sociology and Anthropology, Ames, Iowa: Iowa State University (March).

5. Fear, Frank, Chris Marshall, Keith Carter, and Erik Andersen
1977a Conference for a Better Tomorrow in Calhoun County. Conference Workbook. Sociology Report No. 133B, Department of Sociology and Anthropology, Ames, Iowa: Iowa State University (November).

6. 1977b Conference for a Better Tomorrow in Webster County. Conference Workbook. Sociology Report No. 133E, Department of Sociology and Anthropology, Ames, Iowa: Iowa State University (December).

7. 1977c Conference for a Better Tomorrow in Carroll County. Conference Workbook. Sociology Report No. 133H, Department of Sociology and Anthropology, Ames, Iowa: Iowa State University (December).

8. 1977d Conference for a Better Tomorrow in Greene County. Conference Workbook. Sociology Report No. 133I, Department of Sociology and Anthropology, Ames, Iowa: Iowa State University (December).

9. Marshall, Chris, Frank Fear, Keith Carter, and Erik Andersen
1977a "Needs assessment for a better tomorrow." Presentation made to the Municipal Clerks Institute, Iowa State University (July).

10. 1977b Conference for a Better Tomorrow in Hamilton County. Conference Workbook. Sociology Report No. 133C, Department of Sociology and Anthropology, Ames, Iowa: Iowa State University (December).

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1977c "Exploratory social indicator modeling and testing using multiple indicators within a block-recursive system: A study of the macrosociological determinants of health status." Unpublished doctoral dissertation, Department of Sociology and Anthropology, Iowa State University, Ames (September).

2. Ganey, Rodney F.
1977 "Social system analysis: An evaluation of the learning system paradigm." Unpublished master's thesis, Department of Sociology and Anthropology, Iowa State University, Ames (November).

Forthcoming

Fear, Frank A., Richard D. Warren, and Gerald E. Klonglan
1977 Social Indicators for Rural Development: Social Indicator Modeling. Sociology Report, Department of Sociology and Anthropology, Iowa State University, Ames.